Revolutionizing Human Services Software

System Administrator

v 7.2● June 24, 2019

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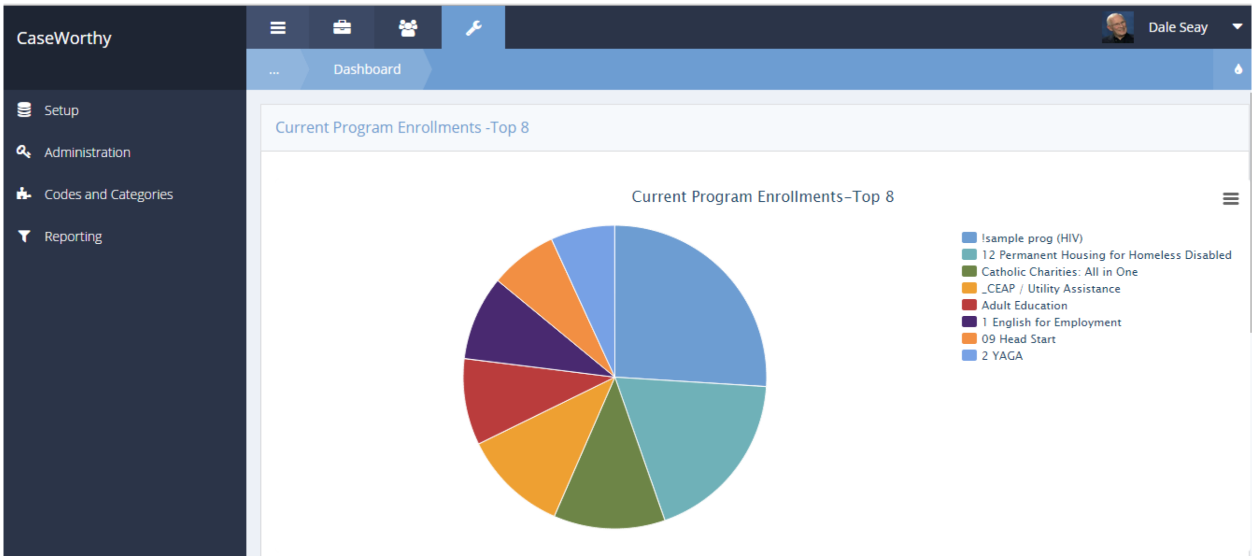
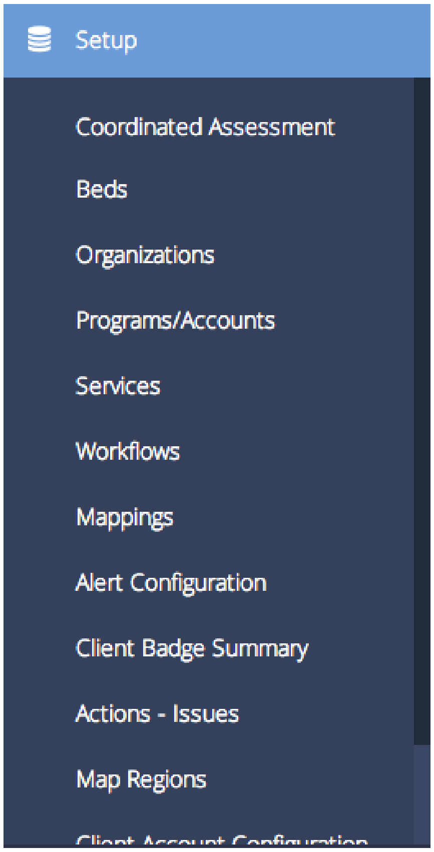
Administration Tab

The Administration tab is the area from which System Administrators access the forms and tools necessary to set up and maintain the system. There are four menu groups on this Tab; Setup, Administration, Codes and Categories, and Reporting.



Setup Menu

The Setup menu hosts the links to the necessary forms to create organizations, providers, programs, accounts, services and workflows. Additionally, there are features that allow for system mapping, managing batch processes and configuring alerts. Note that scrolling is necessary to view the complete list of items in this menu.

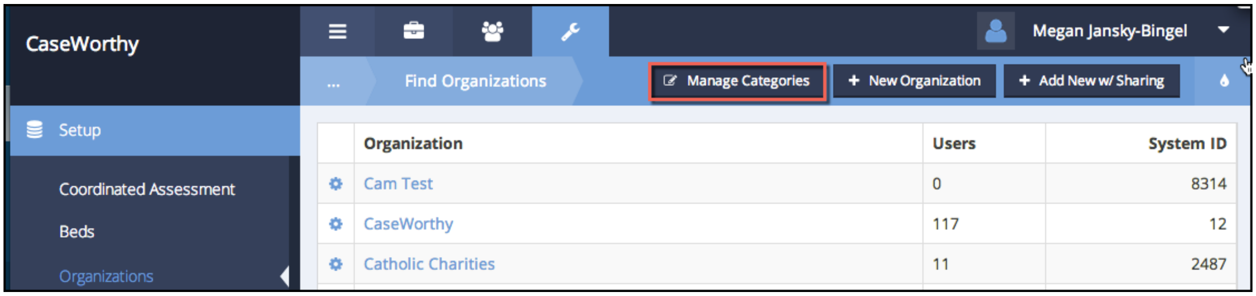


Organizations

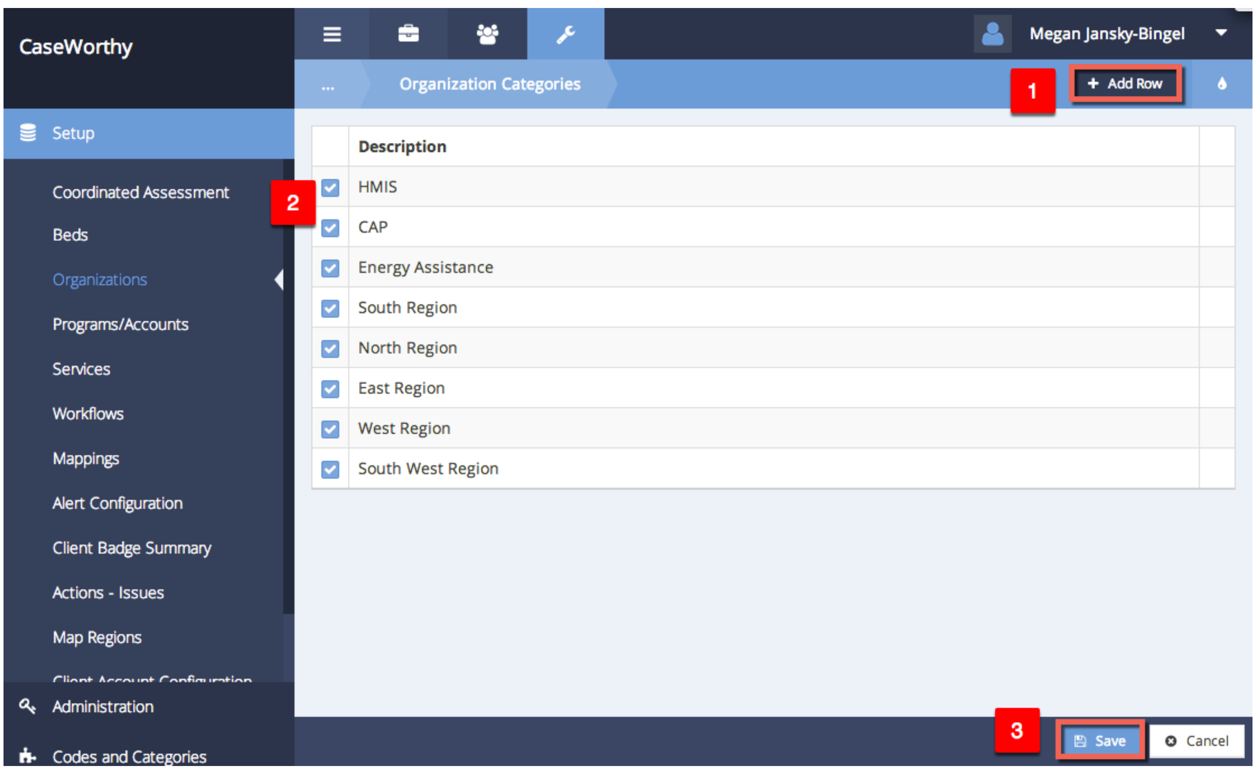
(Administration>Setup>Organizations)

In CaseWorthy™, organizations refer to the agencies to which programs belong. Typically, there is an organization set up for each agency that has users entering program and client related data into the system. Typically, a "generic" organization is created to host the records of external providers that accept referrals from the programs within the system. Organizations can be set up to share or not share with other organizations within the system. Information sharing can be one-way or two-way. Organizations can be filtered by category in certain reports and queries, so each organization has the option to designate a category.

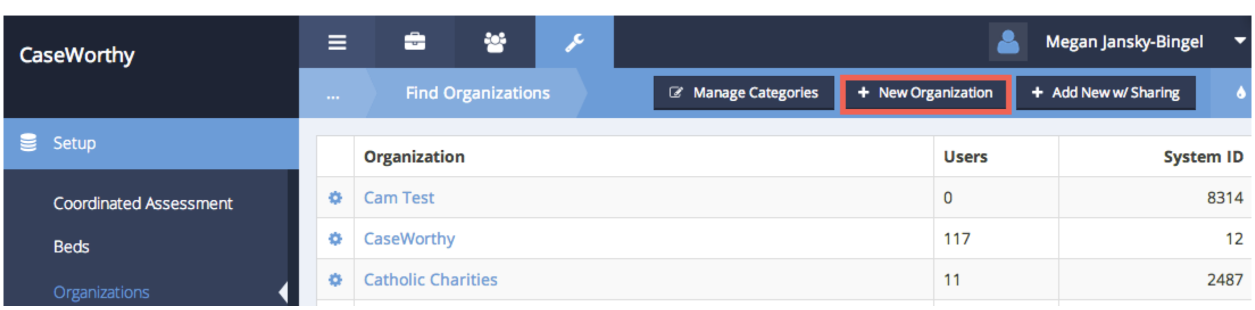
To create or manage categories select the Manage Categories button on the top right of the form.



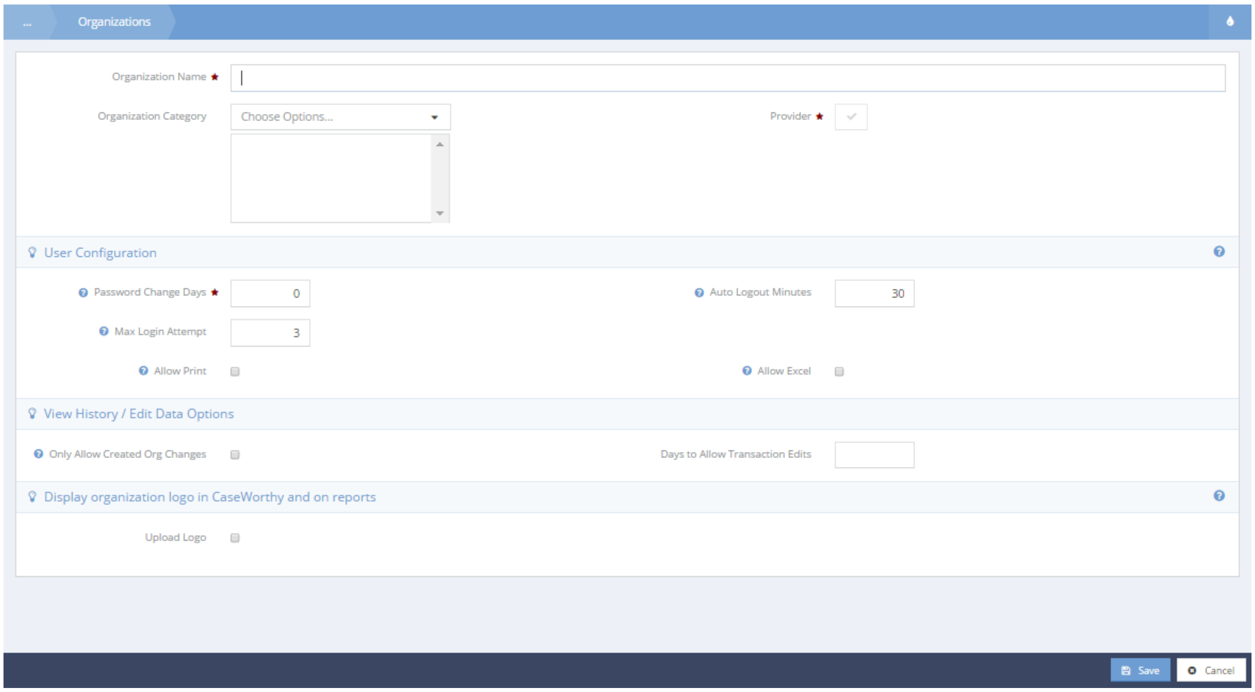
The Organization Categories form appears. Click the + Add Row button to add rows to the form. Enter the desired Category description(s). When all desired Categories have been entered, click the Save button on the bottom right side of the form.



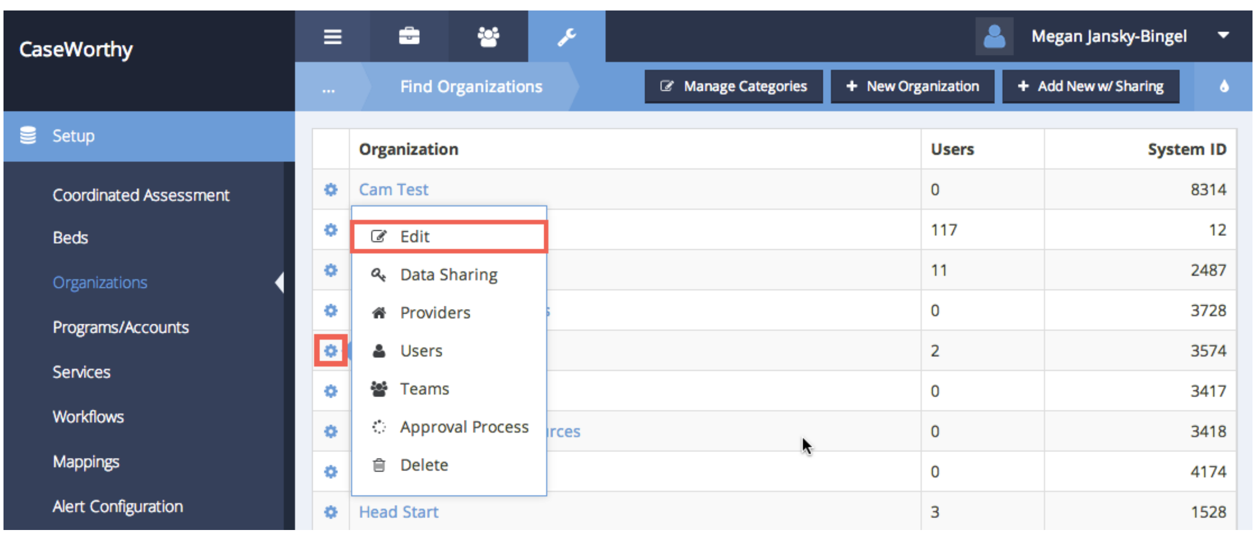
The system navigates back to the Organization summary form. To create a new organization, click the + New Organization button on the top right of the Organization summary form.



Enter all relevant and required information. Required fields are identified by a star * icon. The form cannot be saved until data has been entered. Hover over the help icon for instructions or further information about the fields displayed below the blue section break. Click the Save button on the bottom right of the form when finished.



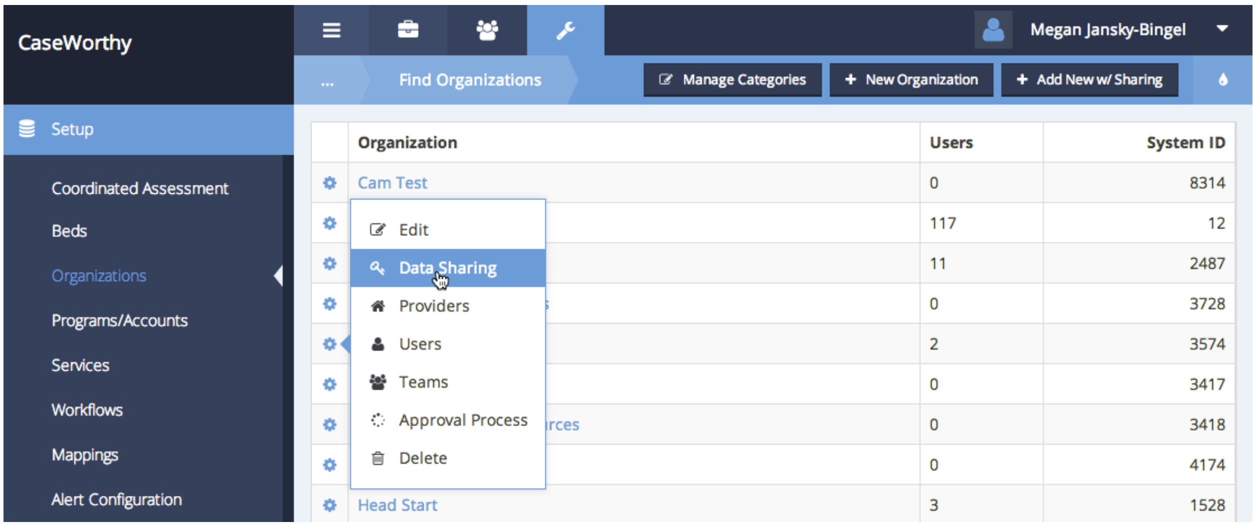
The system returns the user to the Organization summary form. Click on the action gear to view organization details or edit the Setup options.



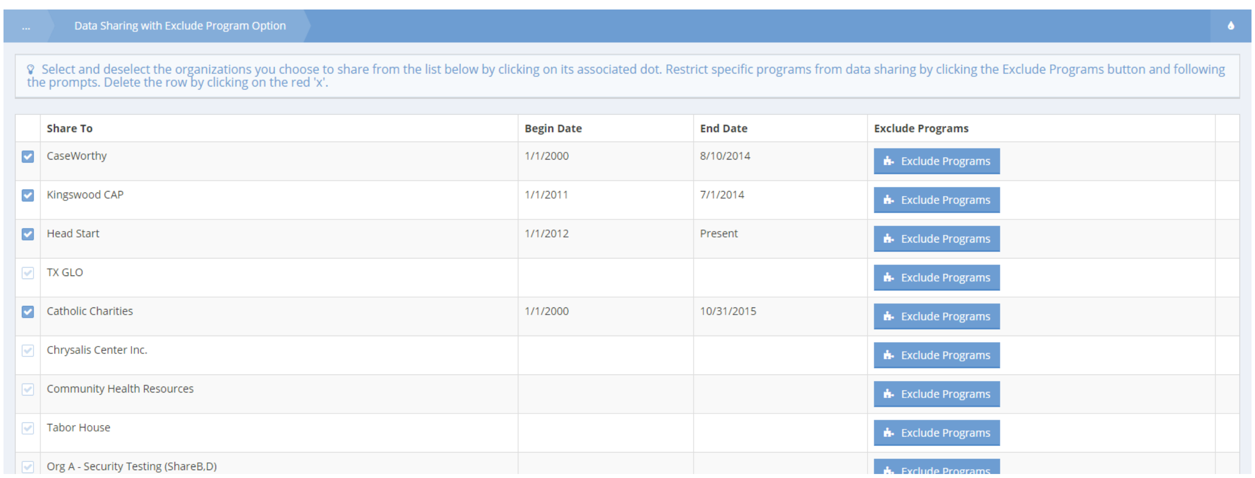
Data Sharing

(Administration>Setup>Organizations>Data Sharing)

Organizations can opt how to share data with other organizations. To set up sharing, click on the action gear and select "Data Sharing" from the pop up menu that displays.

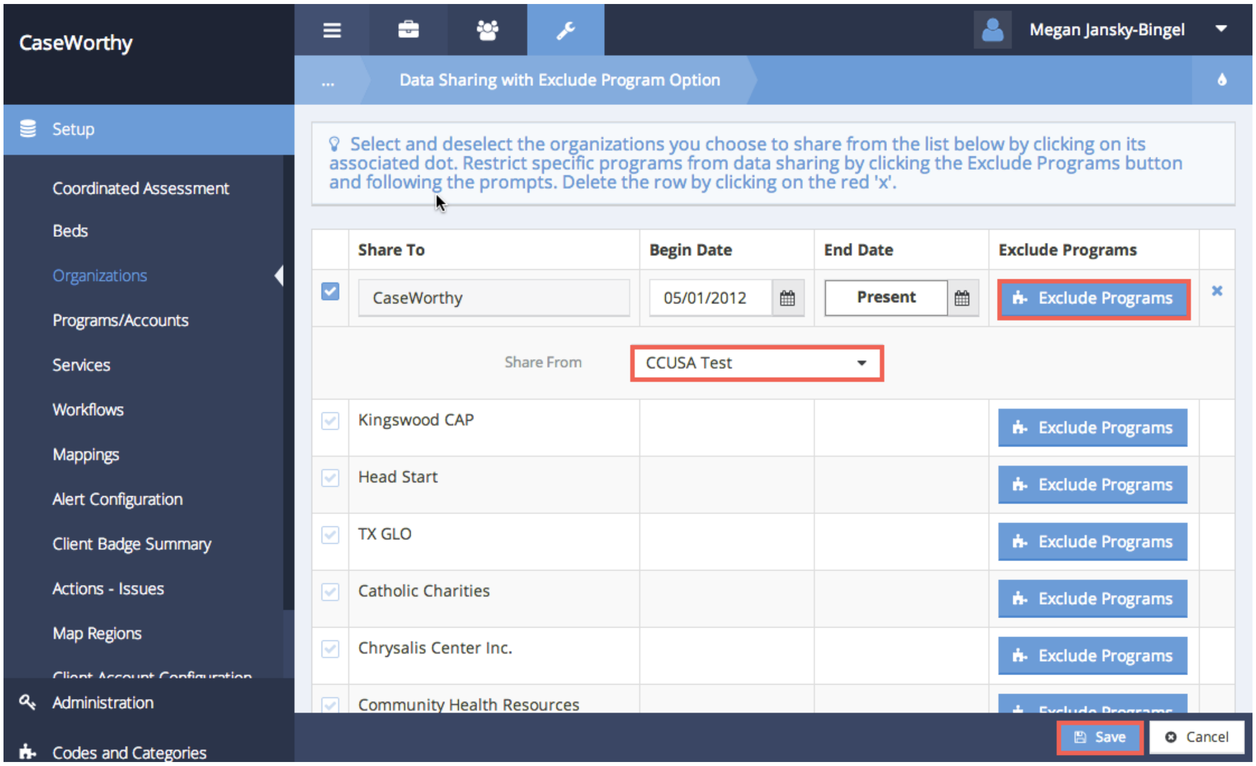


The Data Sharing with Exclude Program Option form displays.



Click on the clear checkbox next to the name of an organization. Use the drop-down list to indicate the name of the organization that shares to the selected organization. If the sharing options are not time limited, enter 12/31/9999 in the end date field.

If the organization wants to create certain program exceptions, such as those dealing with domestic violence issues, HIV/AIDS, Immigration, or other programs that deal with sensitive client information, use the Exclude Programs button to identify programs that should not be included in the sharing of data.



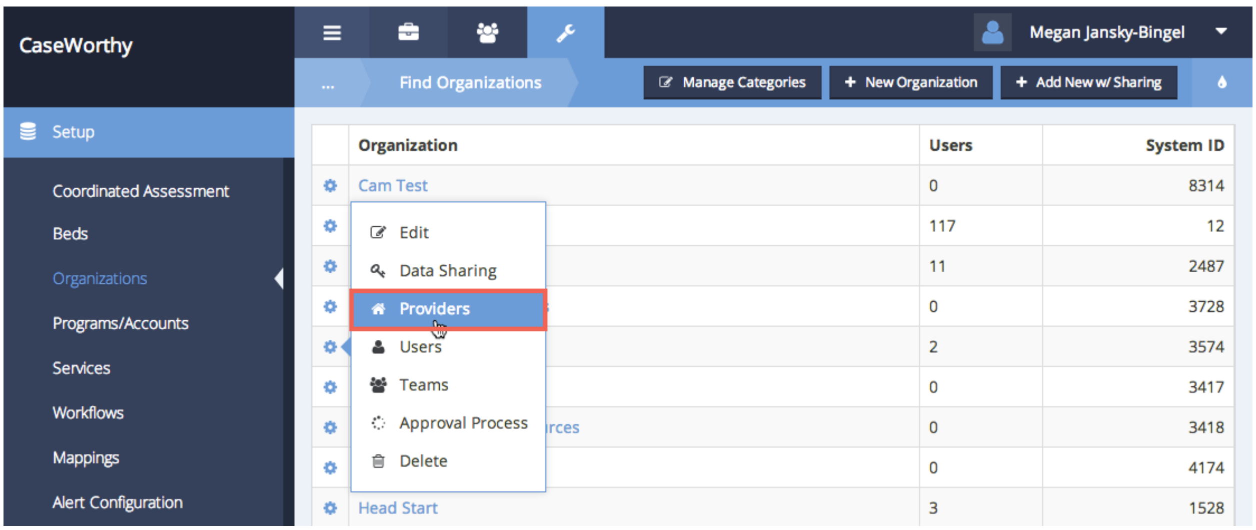
Click the Save button on the bottom right of the form when finished.

Provider Setup

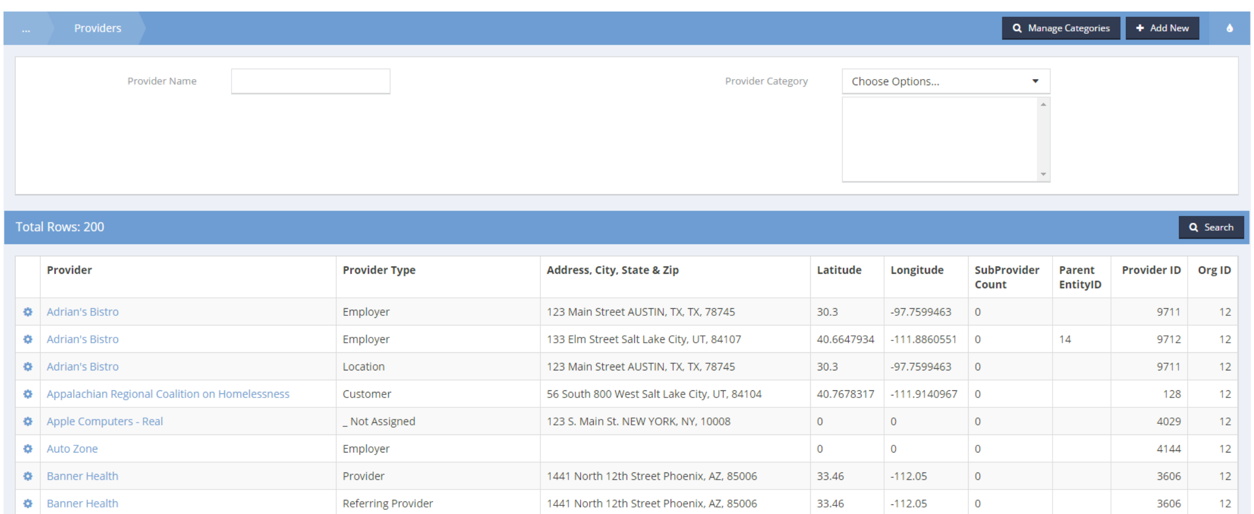
(Administration>Setup>Organizations>Providers)

Within CaseWorthy™, providers are defined as distinct sites. An organization may have more than one location and certain programs can be provided at multiple locations. By creating records for each location, it can then be associated to a client's program enrollment - making it easy to track and report on program data based on the location where it was provided.

From the Organization summary form, click on the desired organization's action gear and select "Providers" from the pop up menu that displays.

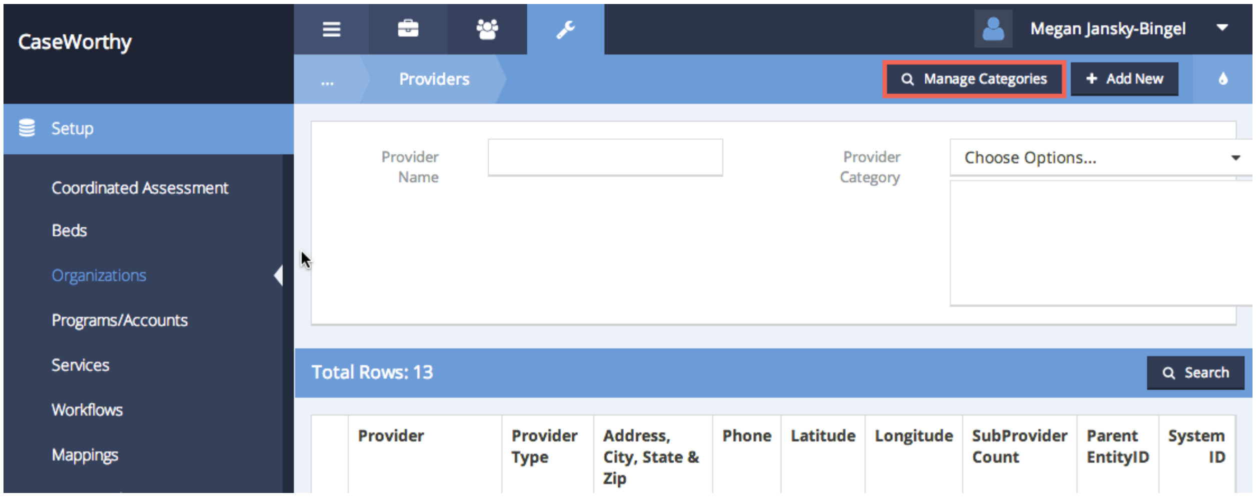


The Providers summary form displays a list of providers.

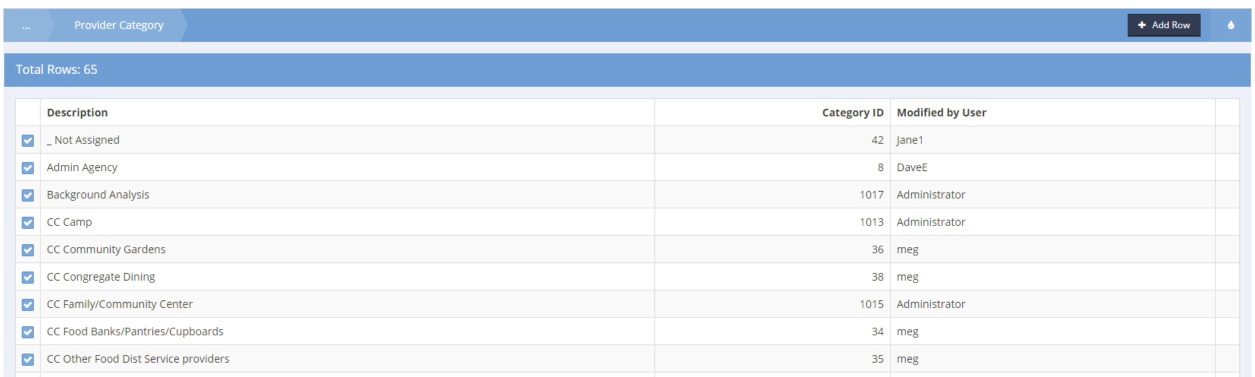


Providers can be filtered by category in certain reports and queries, so each provider *must have* a category designated. For internal providers, various sites within the organization, simply log the category as "provider".

The system ships with numerous provider categories entered. To create or manage categories select the Manage Categories button on the top right of the form.



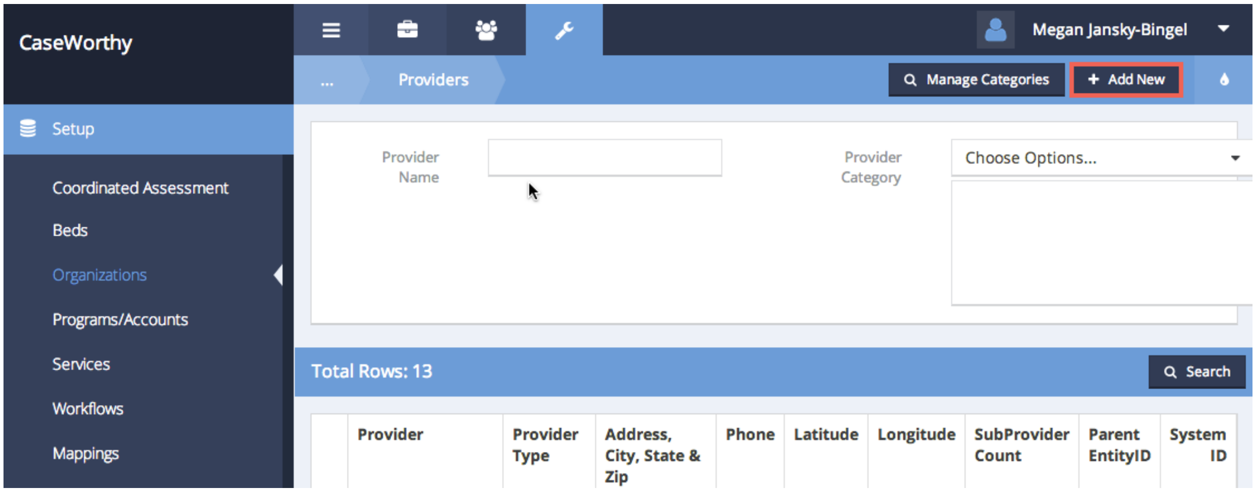
The Provider Category form displays. Click the Add Row button.



A new, expanded row appears.

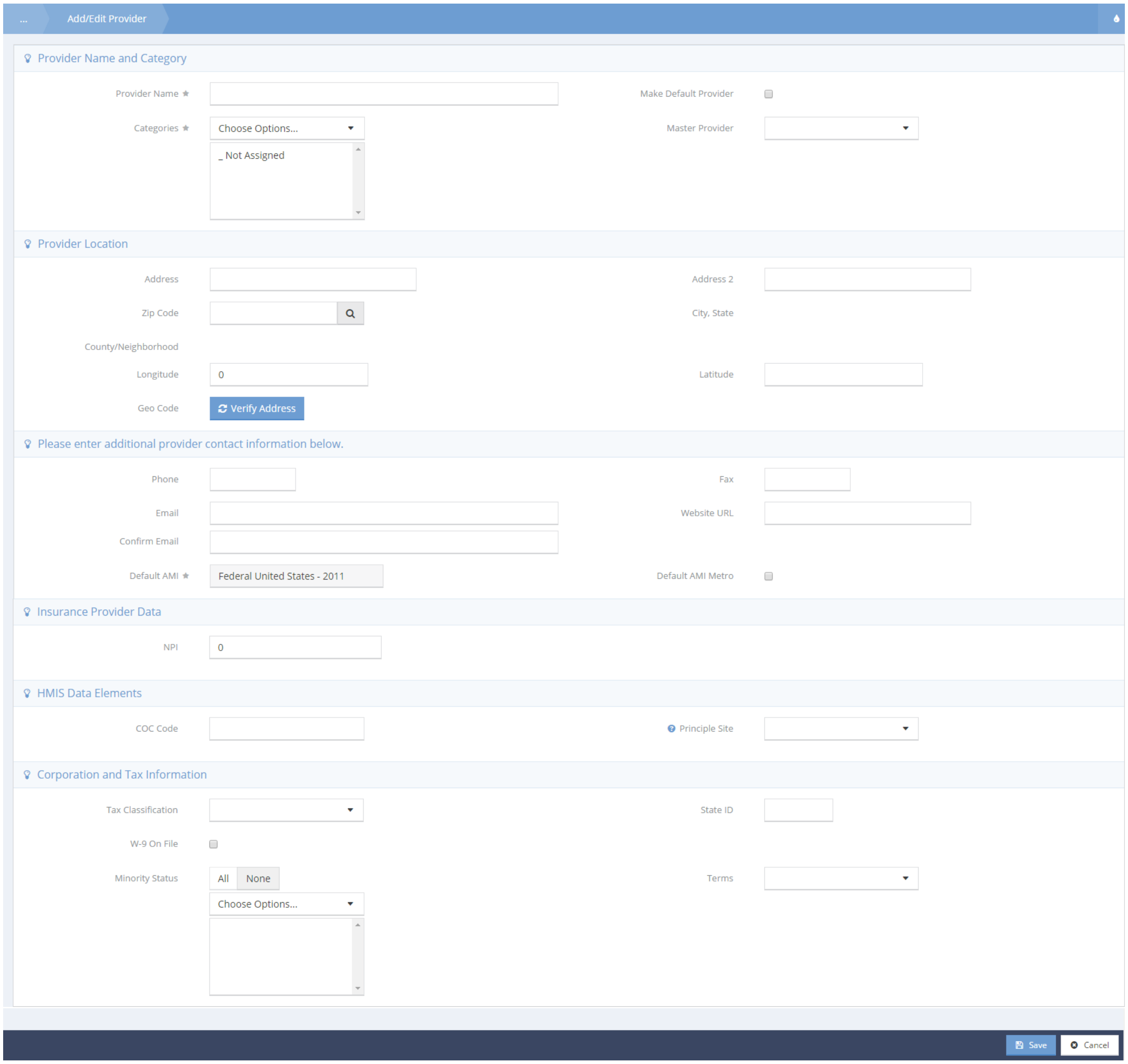
Enter the desired category description. Repeat the process if adding more than one category. When finished, click the Save button on the bottom right side of the form.

The Providers summary form displays.



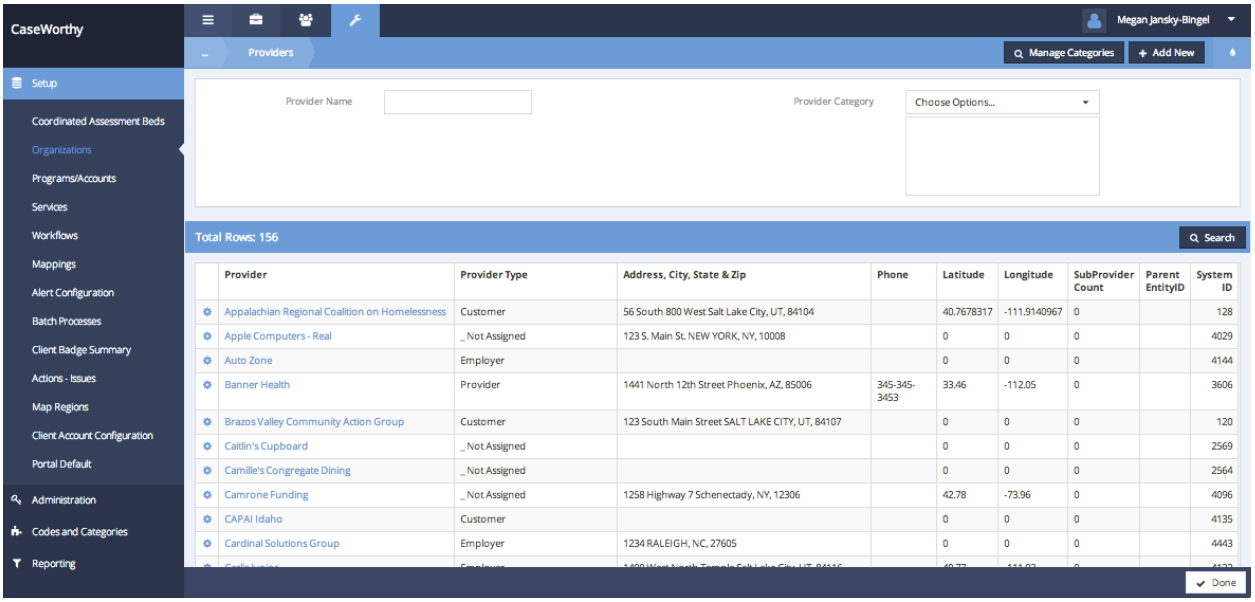
To add a new provider, click the + Add New button on the top right side of the form.

The Add/Edit Provider form displays.



Complete all relevant and required information. Using the Geo-Code can help with determining distance from a client's address to the provider location. When entering data for external or referral providers, the corporation and tax information section may be beneficial. If the provider is an HMIS provider, add the Continuum of Care code and indicate in the Principle Site drop down box whether it is the principle site. When all desired data has been entered, click the Save button on the bottom right of the form.

The Providers summary form displays.

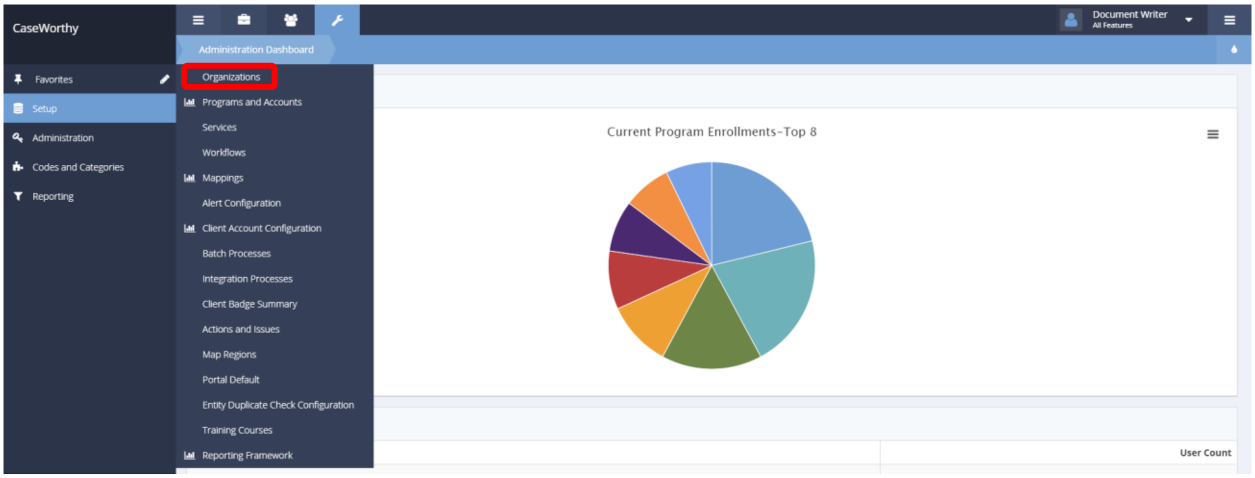


Click ✔ Done on the bottom right side of the form. The Organization summary form renders.

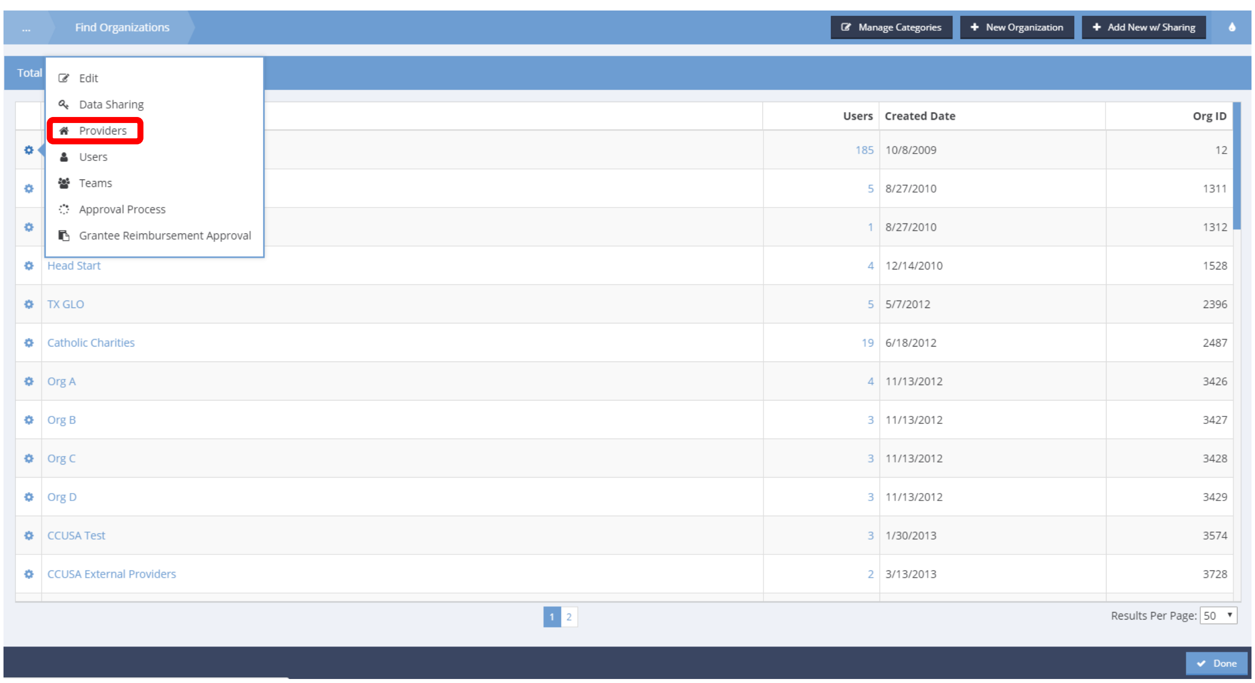
Resource Usage Manage Facility

Objective: Schedule usage of facilities and manage those usages.

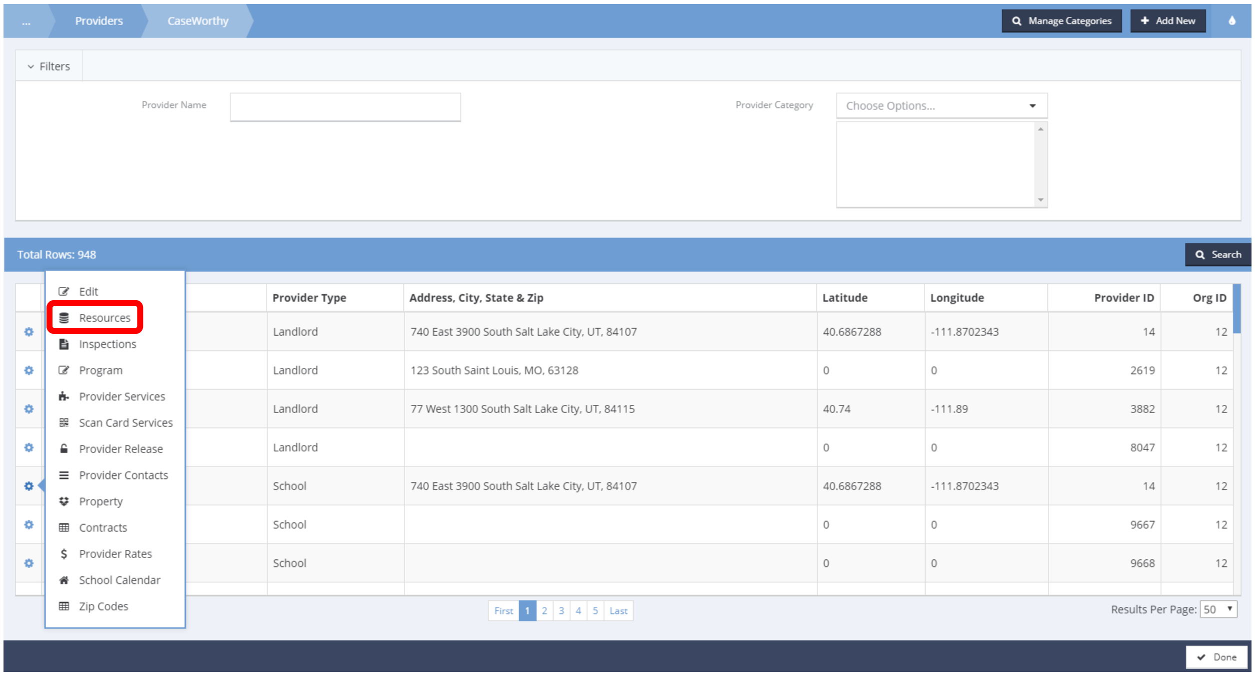
Navigation: Administration>Setup>Organizations>Providers>Resources>...Manage Facility>Resource Usage Manage Facility



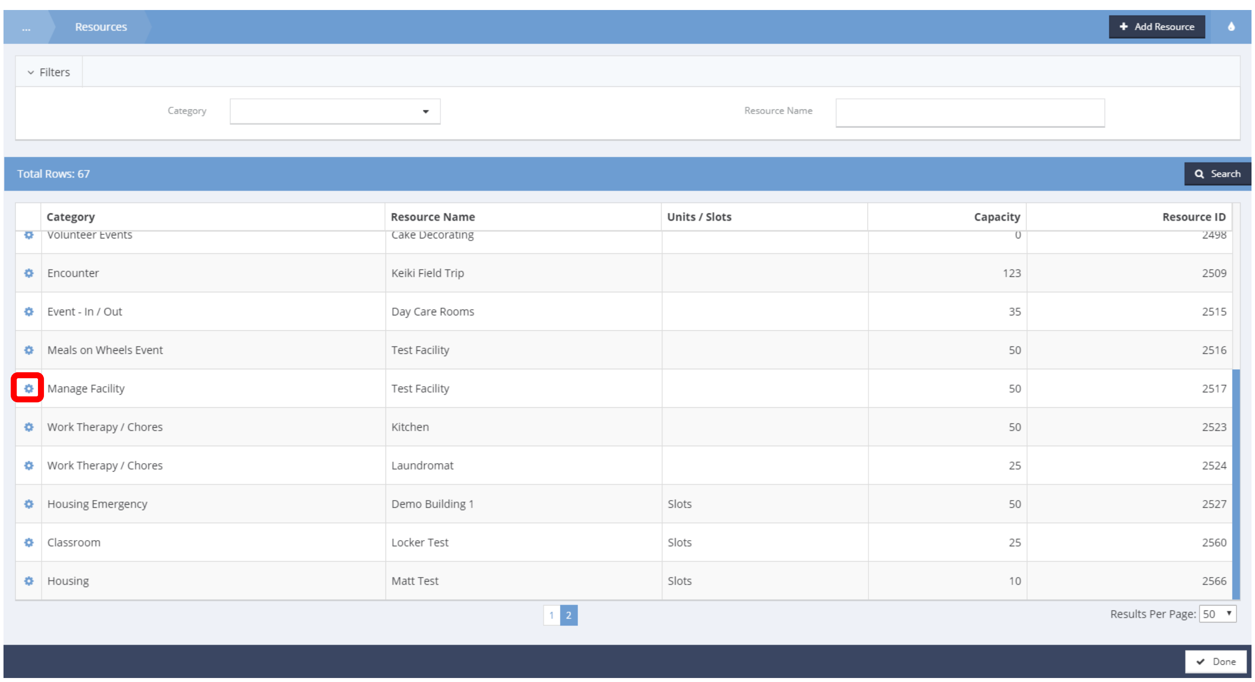
Under the Administration tab, select Setup. A pop-up menu appears. Select Organizations. The Find Organizations form appears.



Click the action gear icon next to a desired organization. Select Providers from the pop-up menu that appears. The Providers form appears.

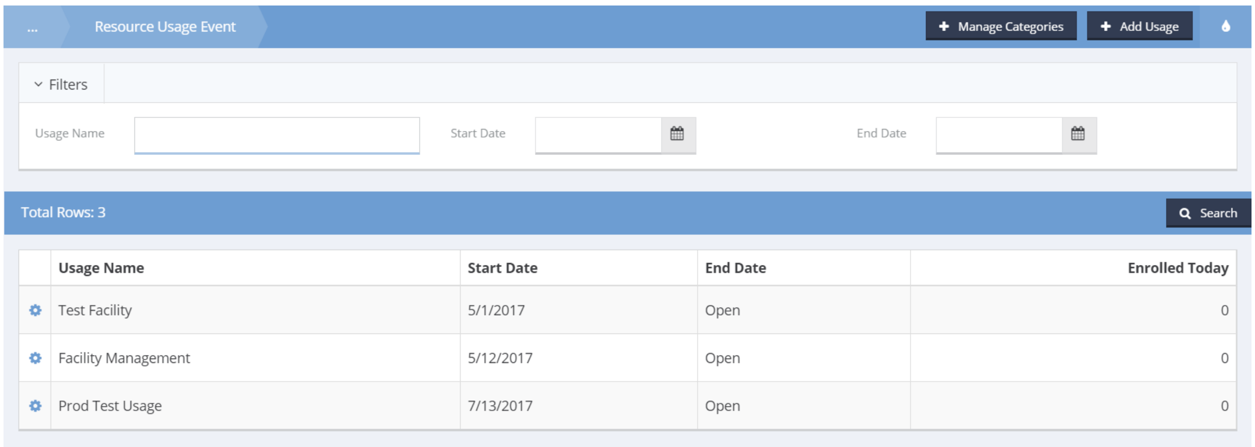


Click the action gear icon next to a desired provider. A pop-up menu appears. Select Resources from the pop-up menu. The resources form appears.

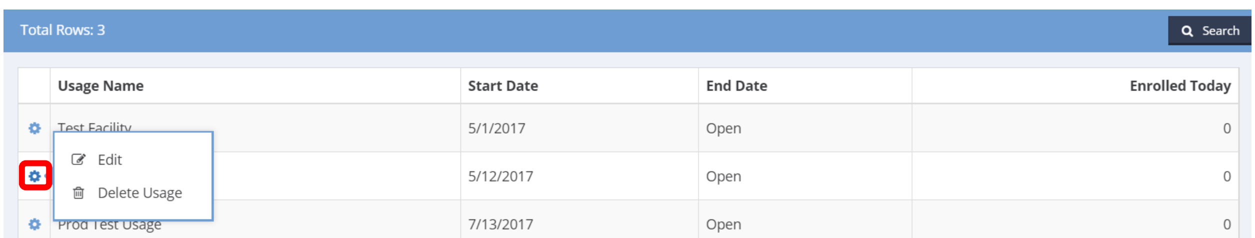


If the Manage Facility resource usage has been added, it appears on this form. Click the action gear icon next to Manage Facility. A pop-up menu appears.

Select Manage Facility from the pop-up menu. The Resource Usage Event form displays showing a list of all associated usages.

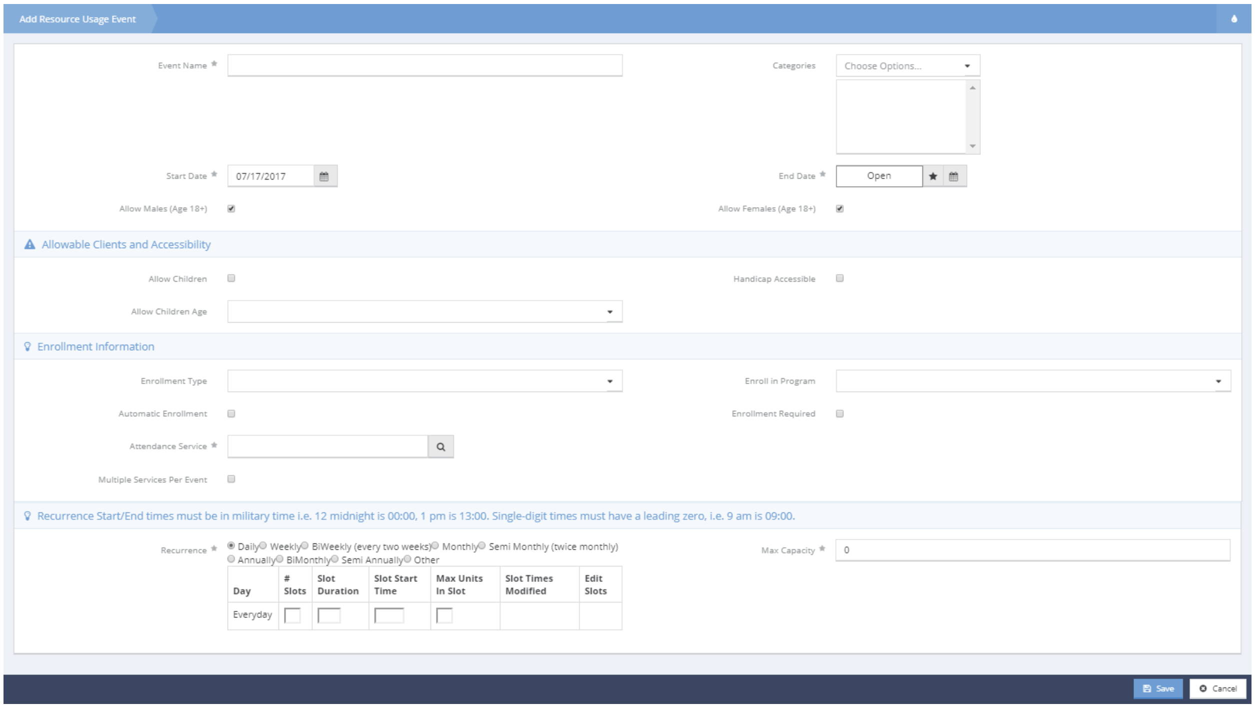


Search for a usage by using the top half of the form to filter through the usages.

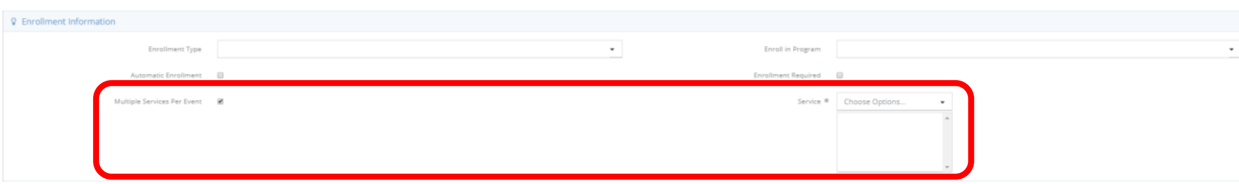


To edit or delete a usage, click the action gear icon and select Edit from the pop-up menu. To add a new resource usage, click the Add Usage button at the top of the form.

The Add Resource Usage Event form appears.



Fill in any required and desired information. Upon selecting Multiple Services Per Event under the Enrollment Information section, a new, drop-down menu box field appears in the section to allow selection of service options.



Click the 

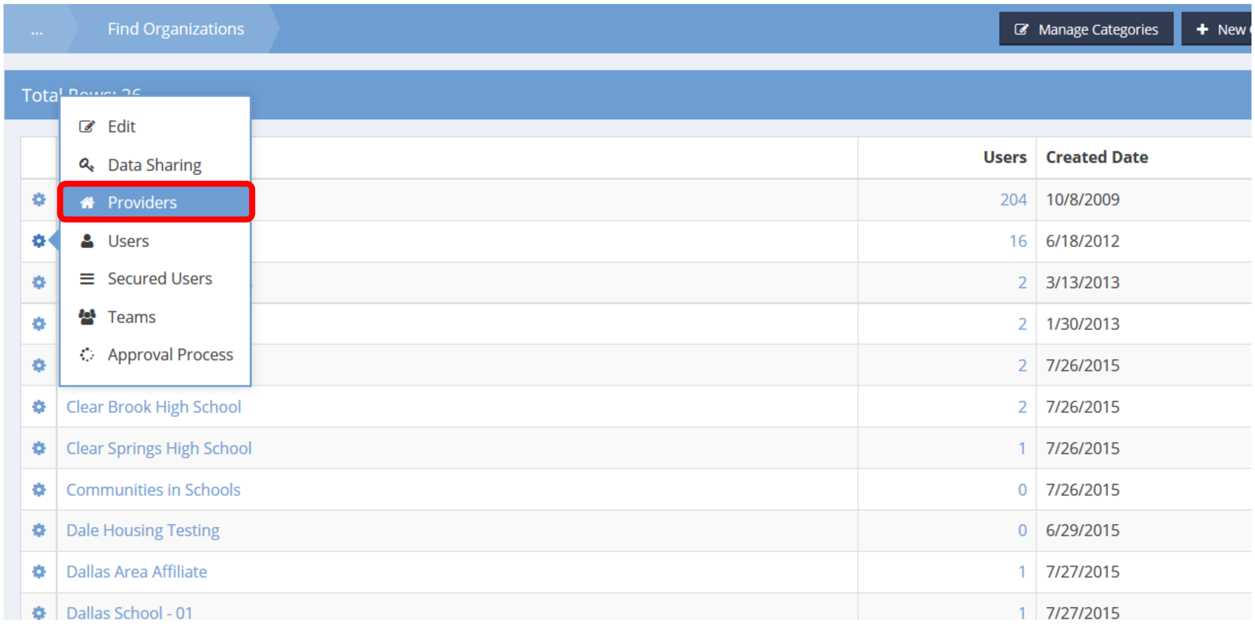
buton to save the form. Click the

button to exit the form and return to the Resource Usage Event form.

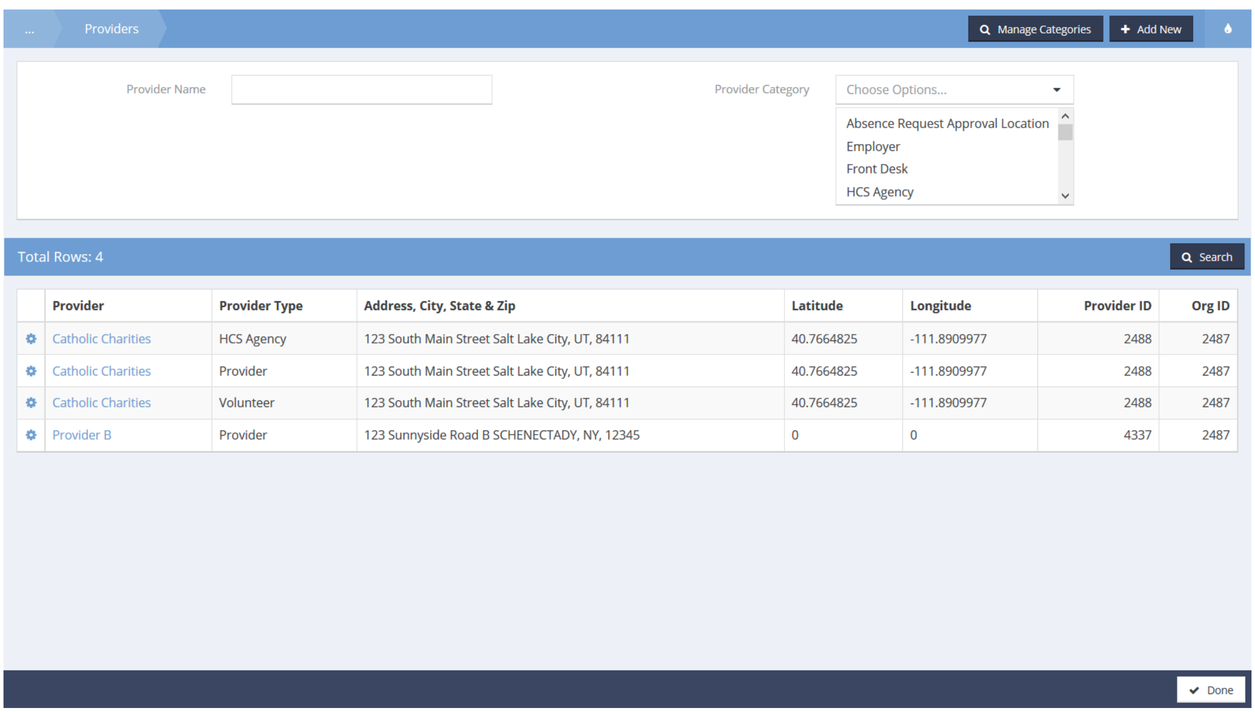
Scattered Site Housing

Click on the action gear icon associated with the desired organization.

Select Providers from the menu options.

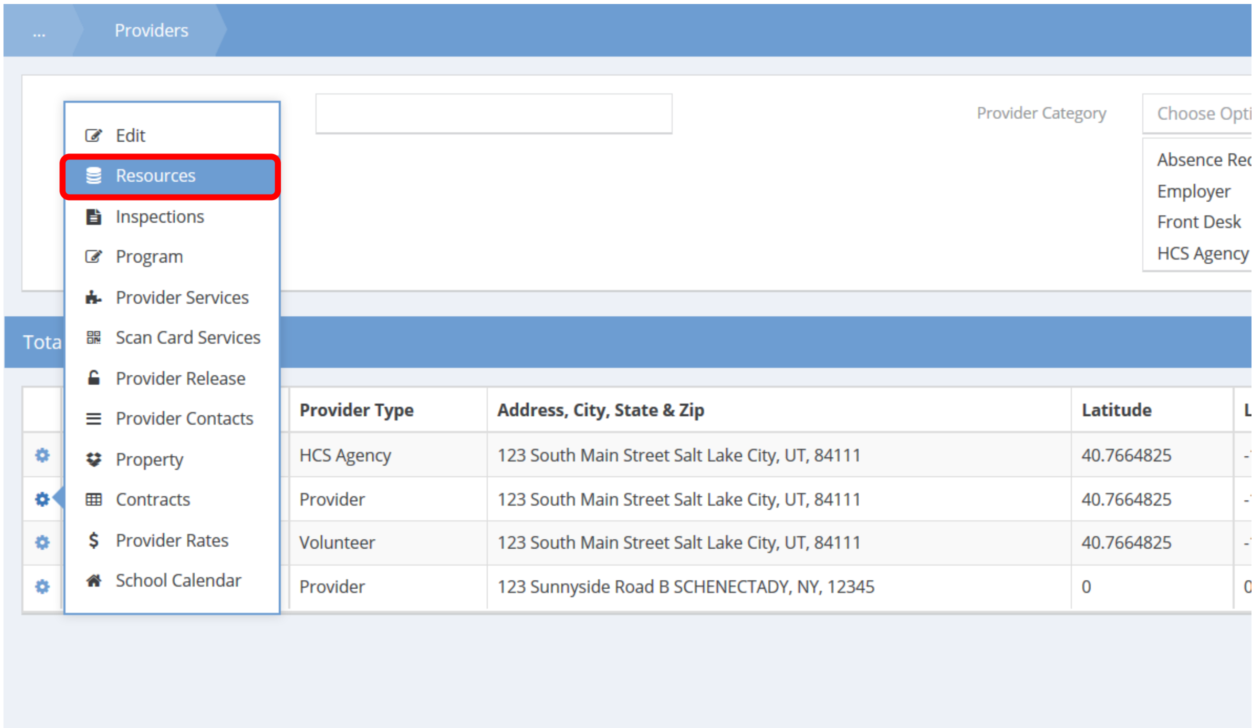


The Providers form displays.

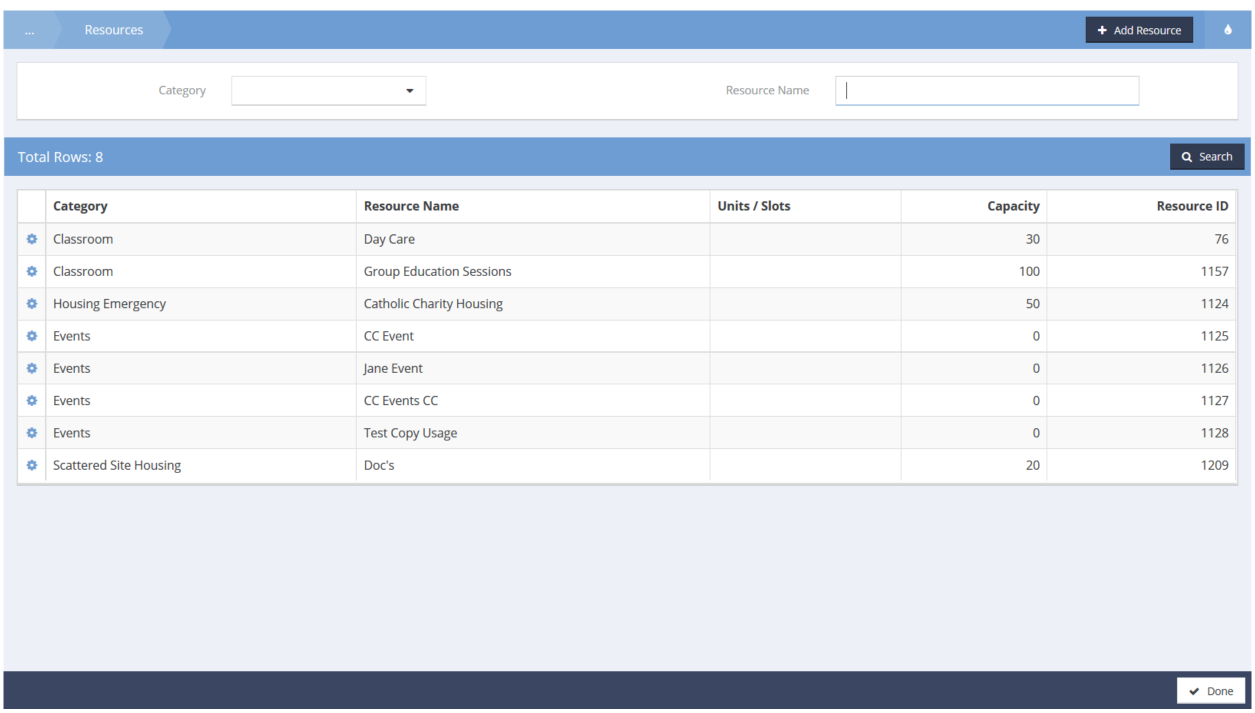


Click on the action gear  icon associated with the desired provider.

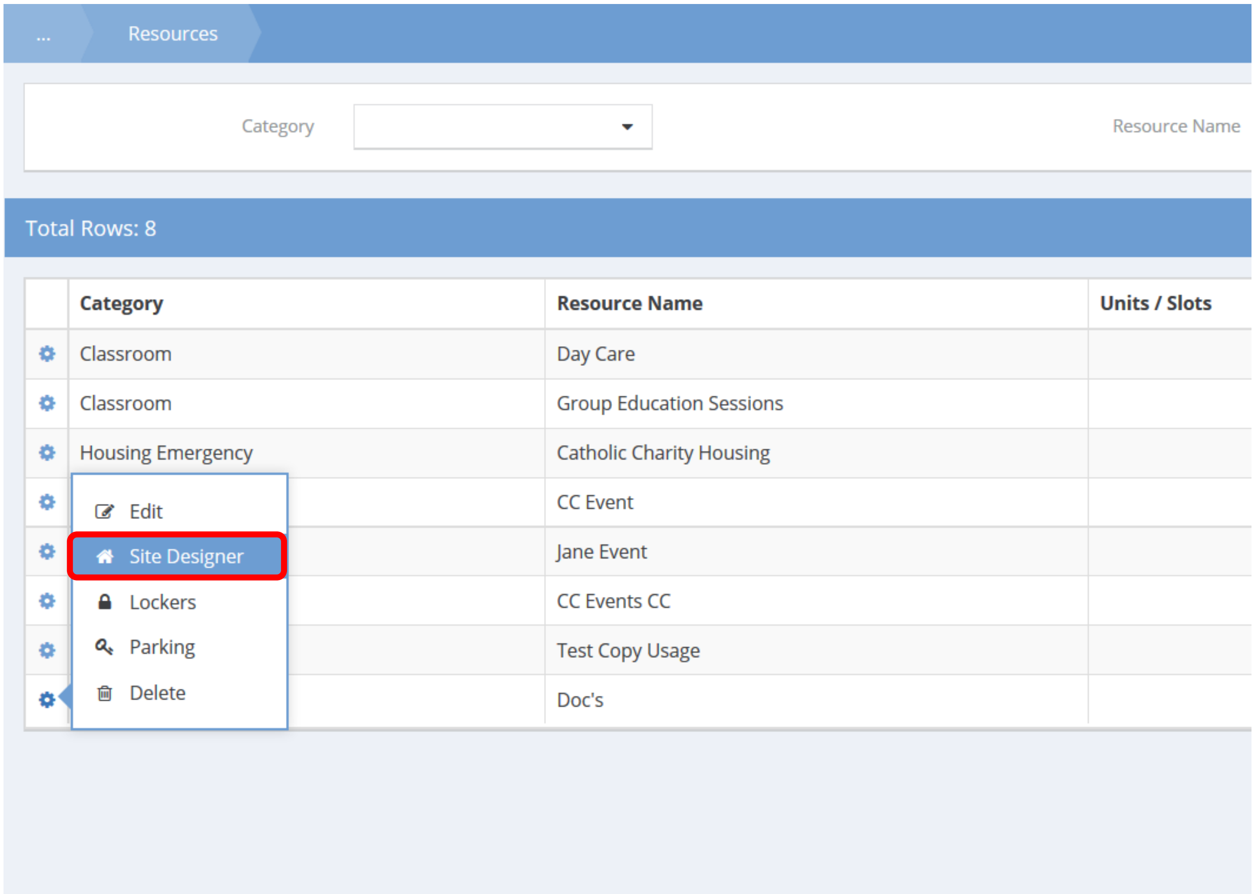
Select Resources from the menu options.



The Resources form displays.



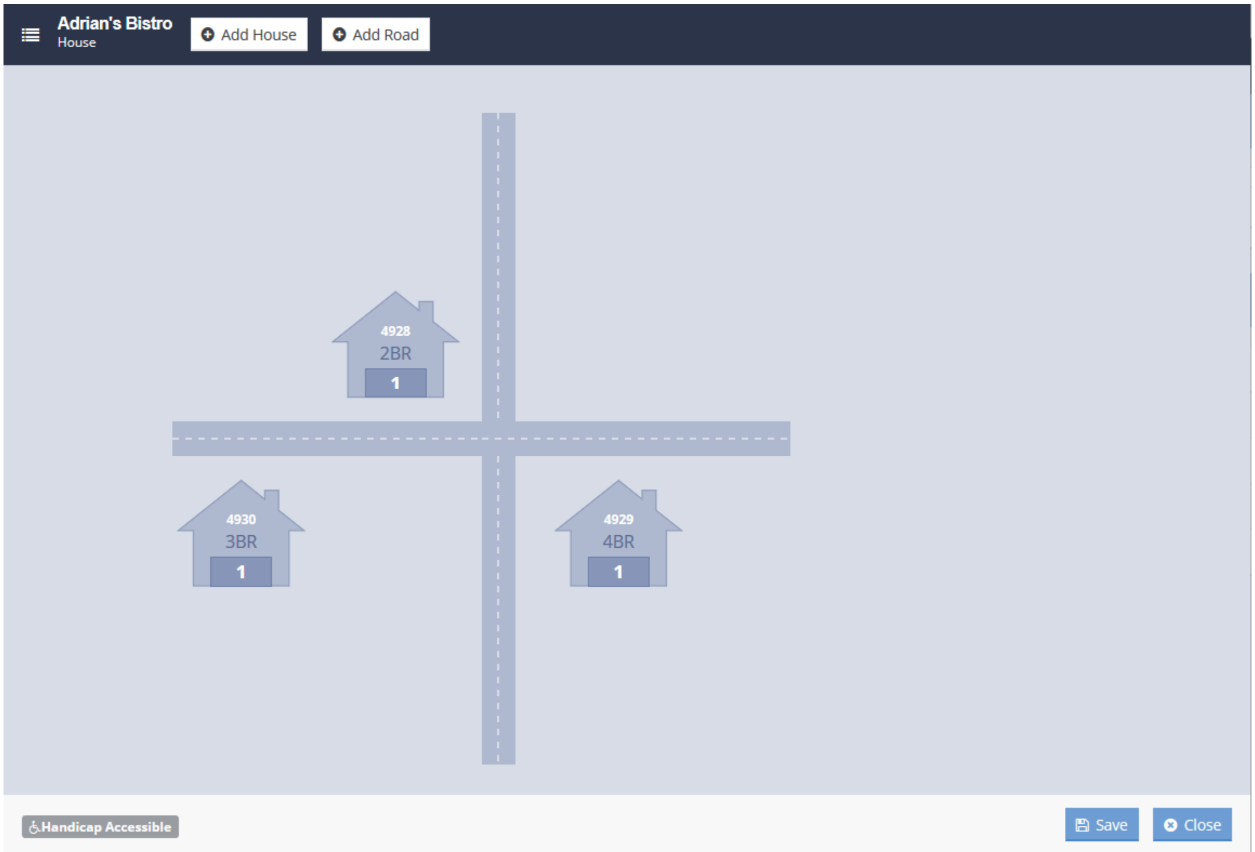
Click on the action gear icon associated with the Scattered Site Housing category and select Site Designer from the menu options.



The Scattered Site Housing Designer form displays in a new pop-up window.

To add a house click the Add House button and click and drag the desired house to the desired position on the site designer screen. The same can be done to add a road after clicking the Add Road button.

Once on the site designer screen, the houses and roads can be moved to any desired location by clicking and dragging.

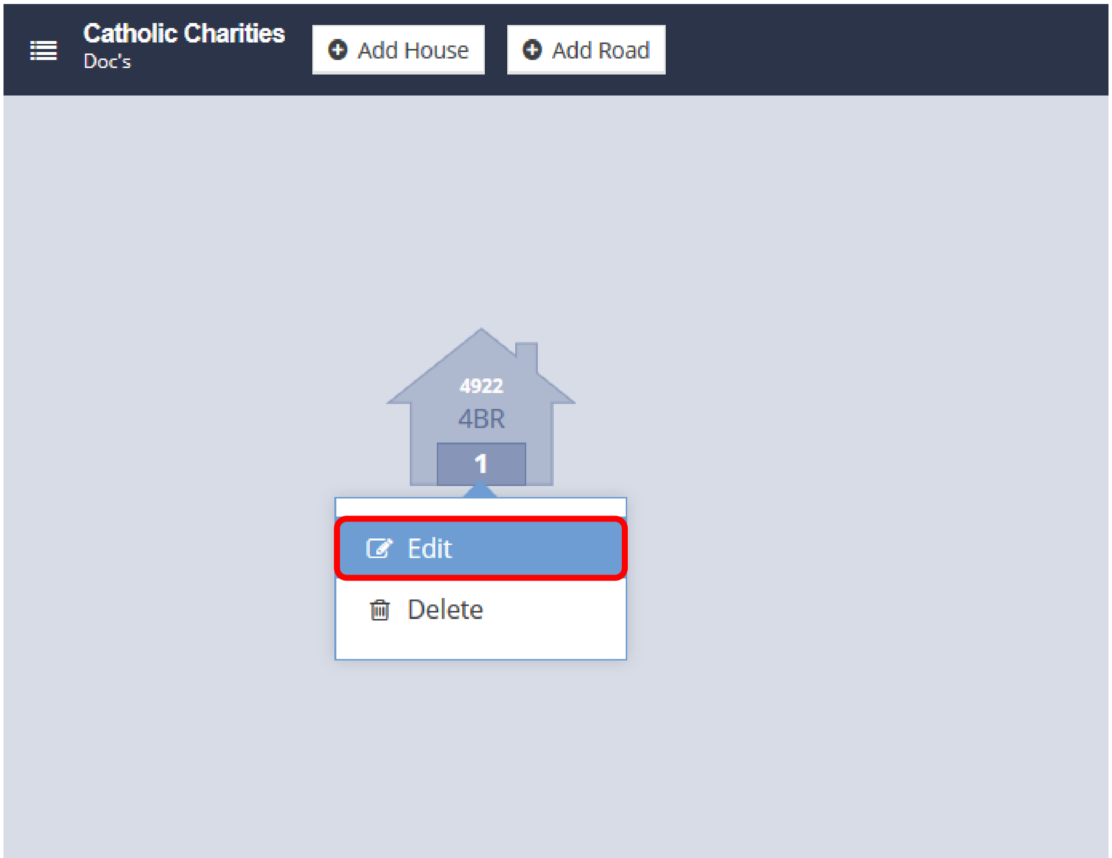


To delete or extend a road, click the desired road and select from the menu options.

Note: Extending a road extends the road until it hits a stopping point, whether that be another road, a house, or the edge of the screen.

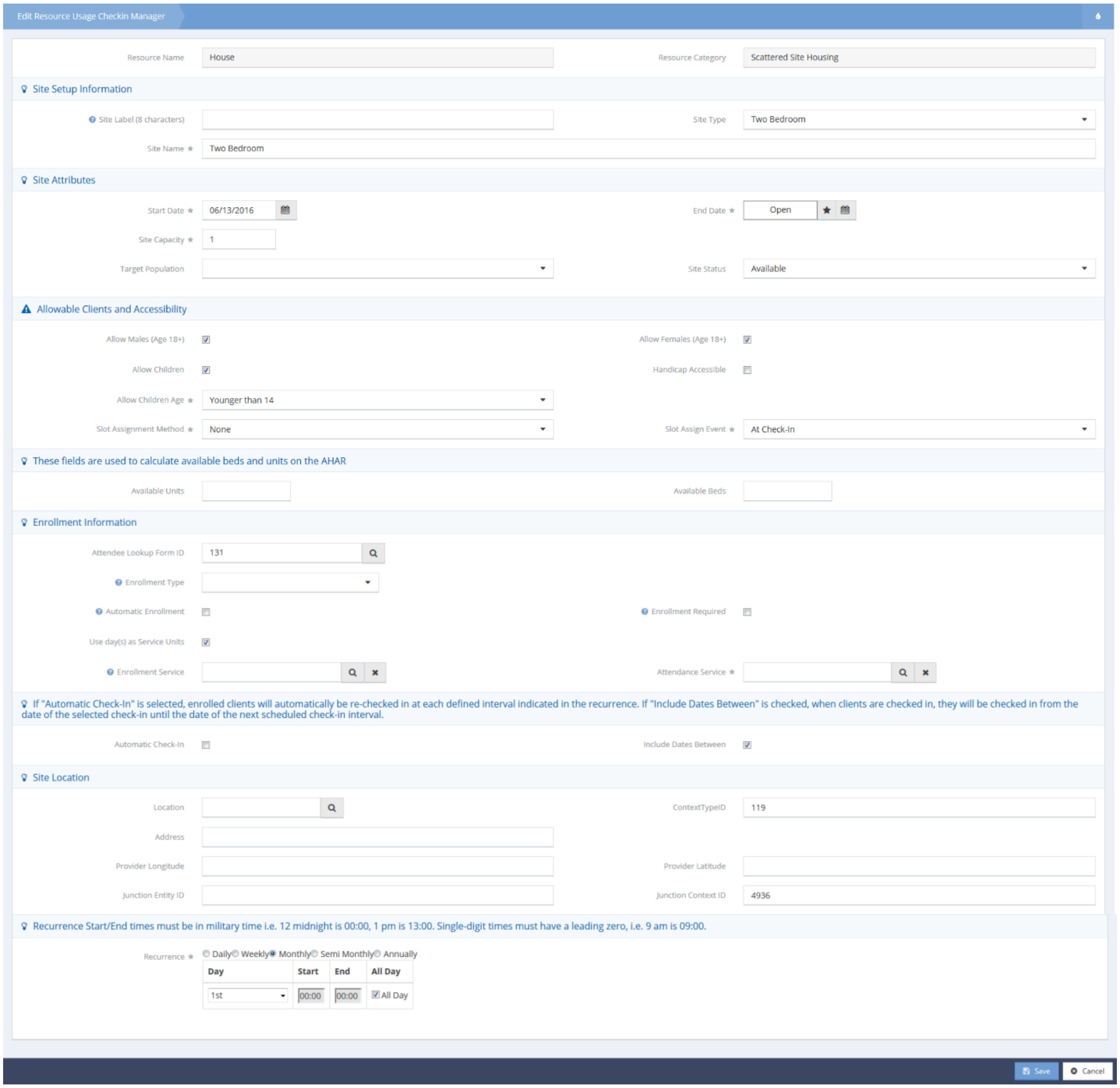
To edit the name of a house, click the numbers listed above the bedroom count and begin typing. To edit the Check-In feature for a house, or to delete, click on an exisiting house and select the appropriate option from the menu.

Select Edit from the menu options.



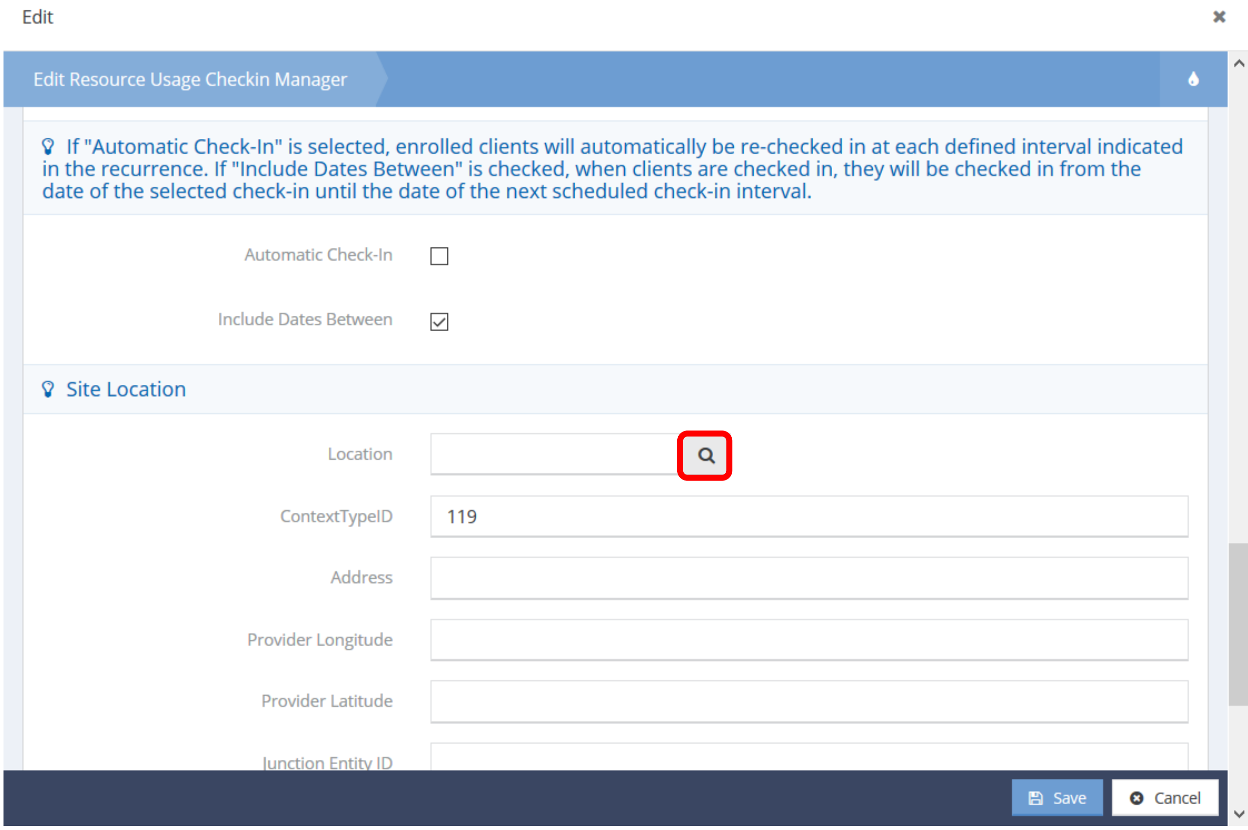
The Edit Resource Usage CheckIn Manager form displays in a new pop-up window.

The Edit Resource Usage CheckIn Manager form displays in a new pop-up window.

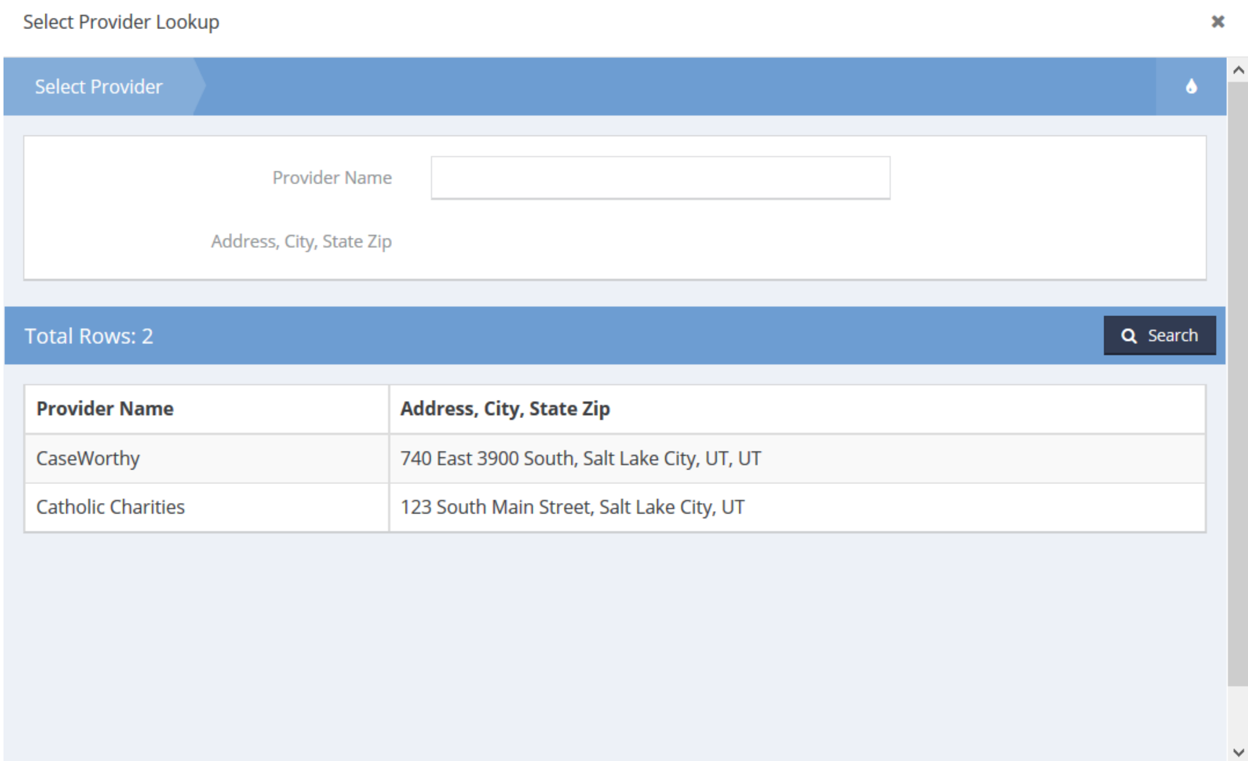


Enter information into required fields: Site Name, Start Date, End Date, Site Capacity, Allow Children Age, Slot Assignment Method, Slot Assignment Event, Attendence Service, and Recurrence. Fill remaining fields as desired.

To add location click on the magnifying glass  icon associated with the Location dialog box located in the Site Location portion of the form.



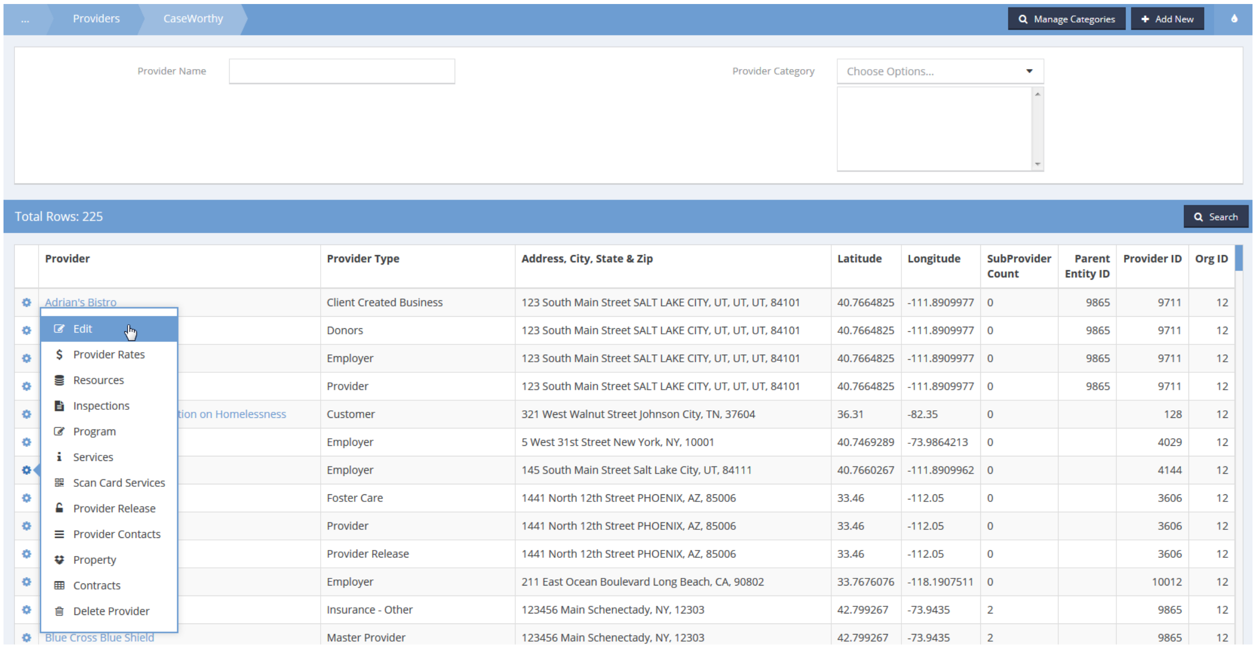
The Select Provider form displays.



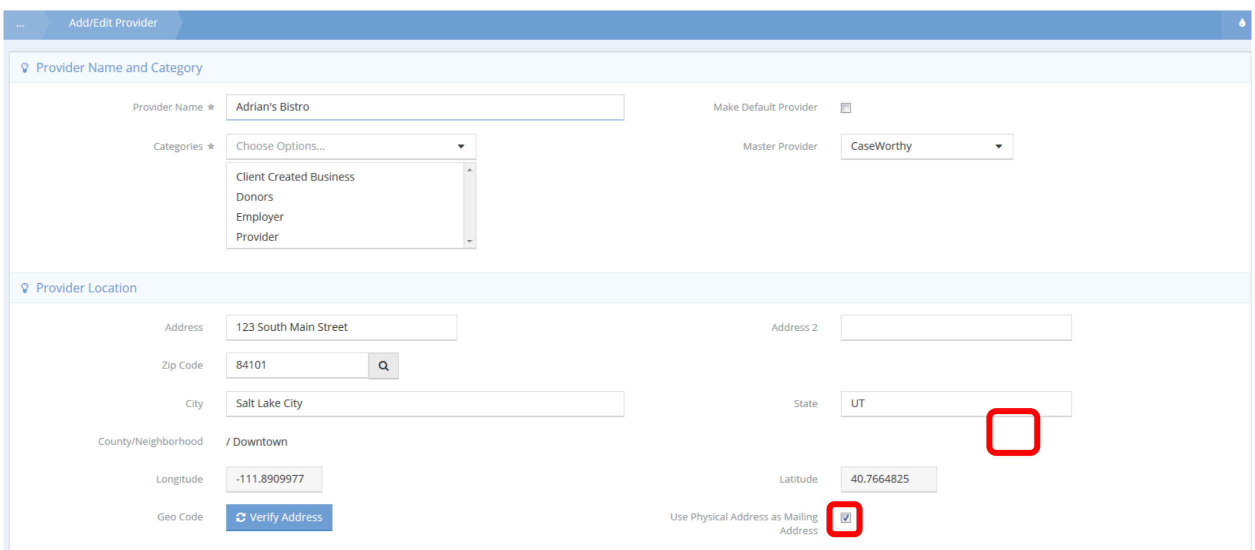
Lookup or select a provider name. The window closes upon selection. Fill remaining fields of the Edit Resource Usage CheckIn Manager form and click the Save button to save and exit. The Scattered Site Housing Designer form displays once again. Click the Save button to save. Click the Close button when finished.

Provider Mailing Address

(Administration>Setup>Organizations>Providers)

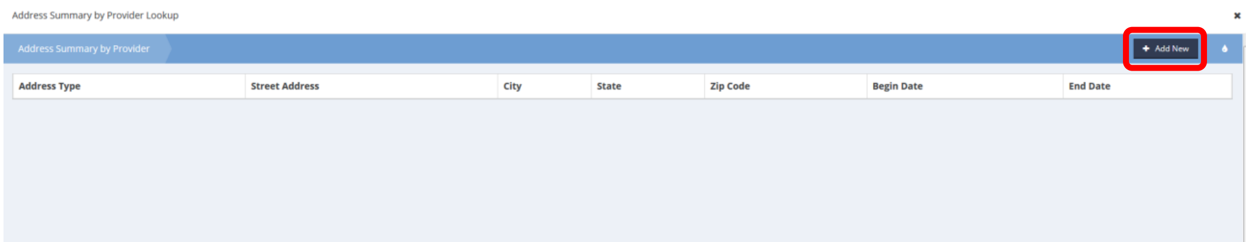


On the desired provider, click the action gear icon and click Edit. The Add/Edit Provider form displays.



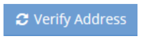
Uncheck the “Use Physical Address as Mailing Address” checkbox. A new field, “Add Mailing Address”, appears.

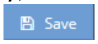
Click the magnifying glass lookup icon for Add Mailing Address. The Address Summary by Provider form displays.



Click the Add New button.

The Provider Mailing Address form displays.

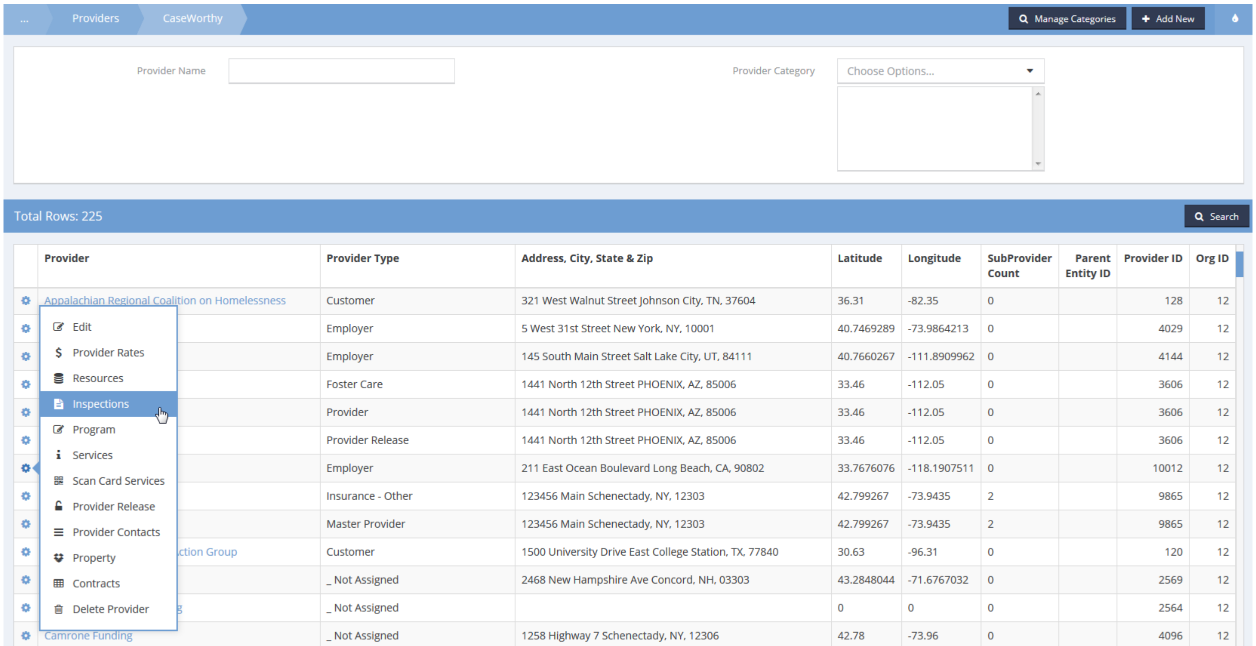
Enter an address, zip code, city, and State. Click the 

button and select the correct address in the pop up window. Click the 

button when finished.

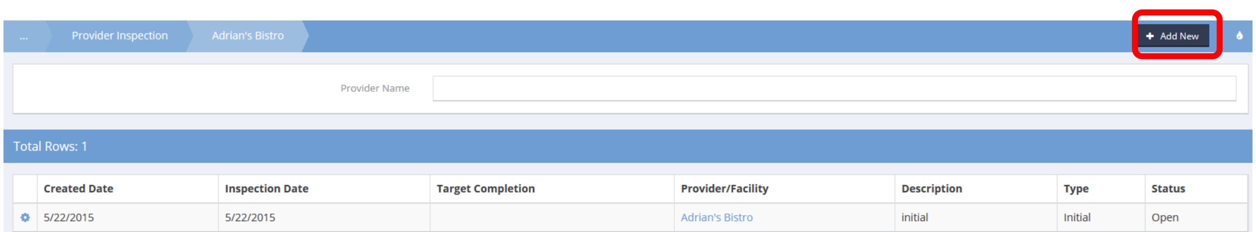
Provider Inspections

(Administration>Setup>Organizations>Providers)



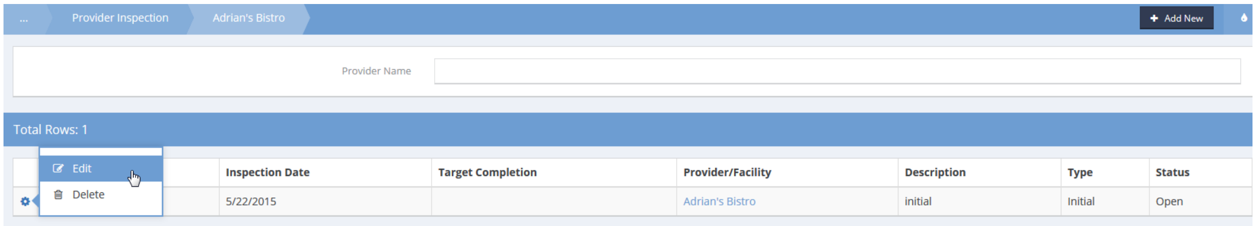
Click the action gear icon and select Inspections from the pop up menu that appears.

The Provider Inspection summary form displays.



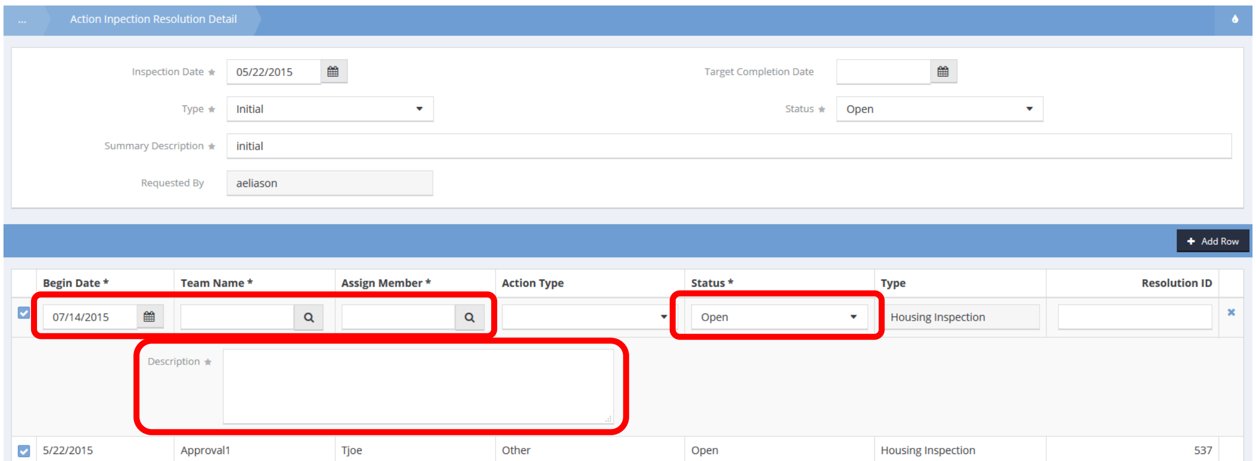
To create a new inspection, click the Add New button. The Provider Inspection (Input) form displays.

Enter an inspection date, select a type from the drop-down list, select a status and enter a description. Click Save when finished.



To edit an existing inspection, click the action gear  icon and click Edit.

The Action Inspection Resolution Detail form displays.

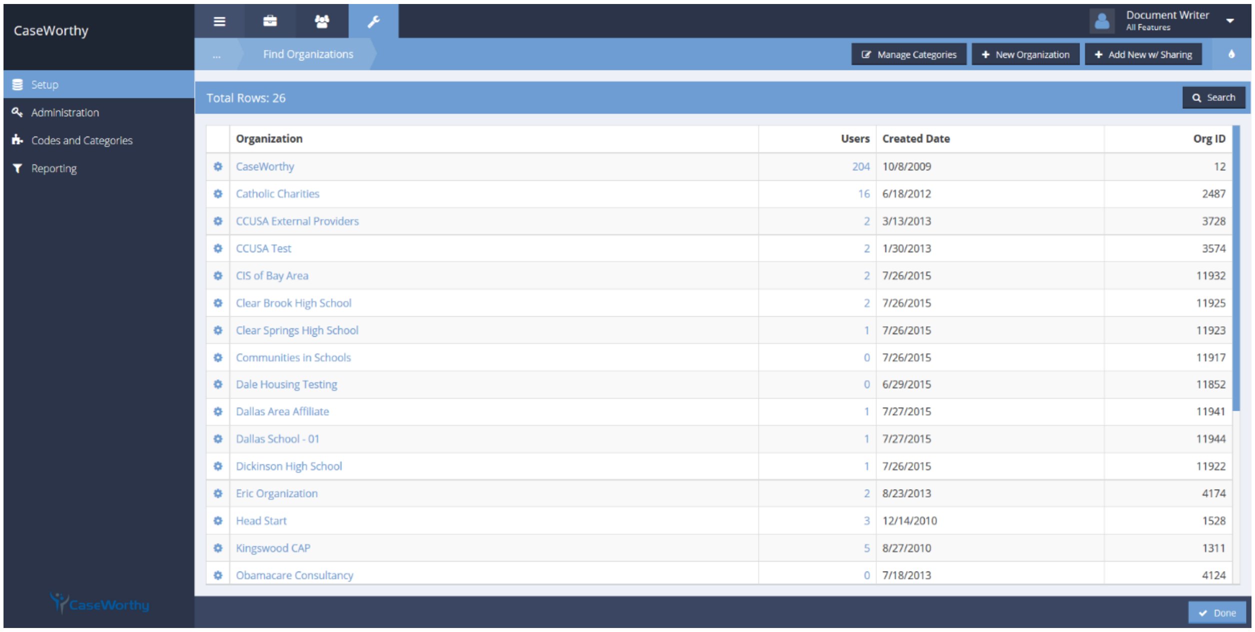


Make any desired changes. In the spreadsheet, click Add Row to create a new action. Select a team name, assign a member, select a status, enter a description and select an action type if desired. Click Save when finished.

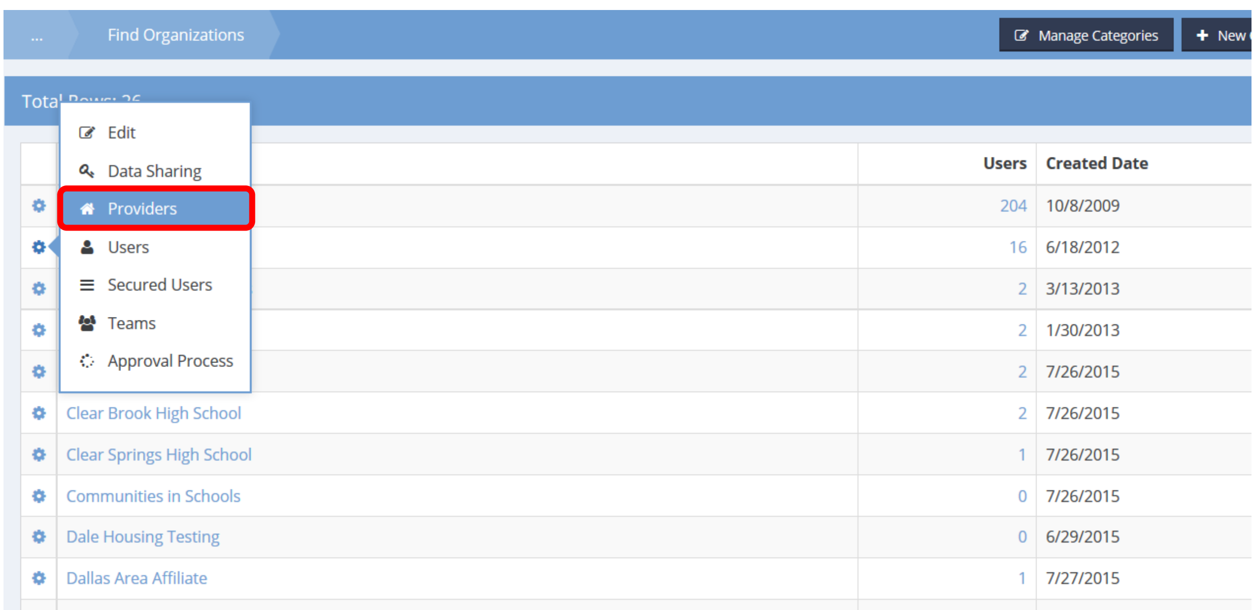
Provider Services

Objective: View services with a referral/service request usage type linked to a specific provider and view, edit, or add poverty billing/billing rate details.

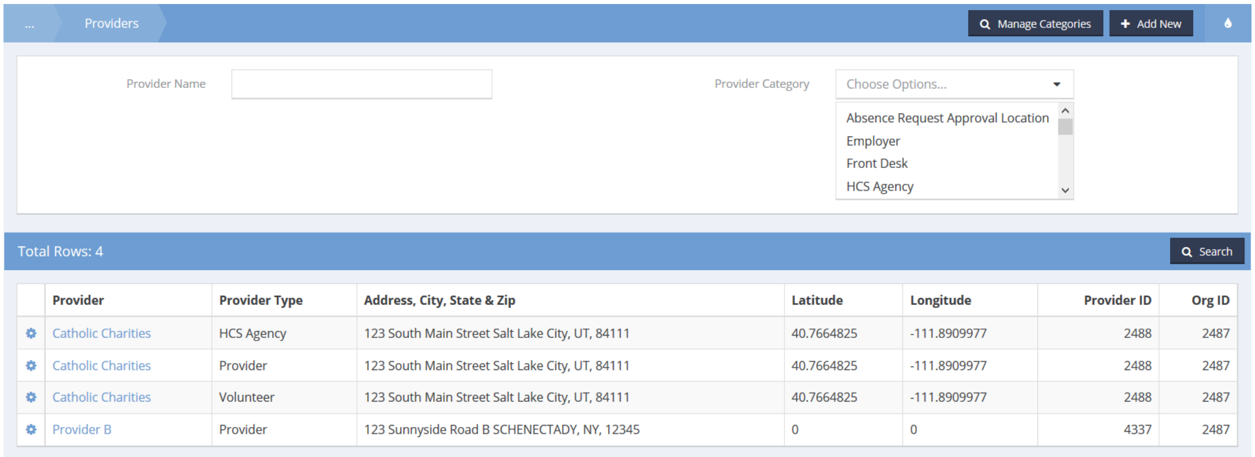
Navigation: Administration>Setup>Organizations



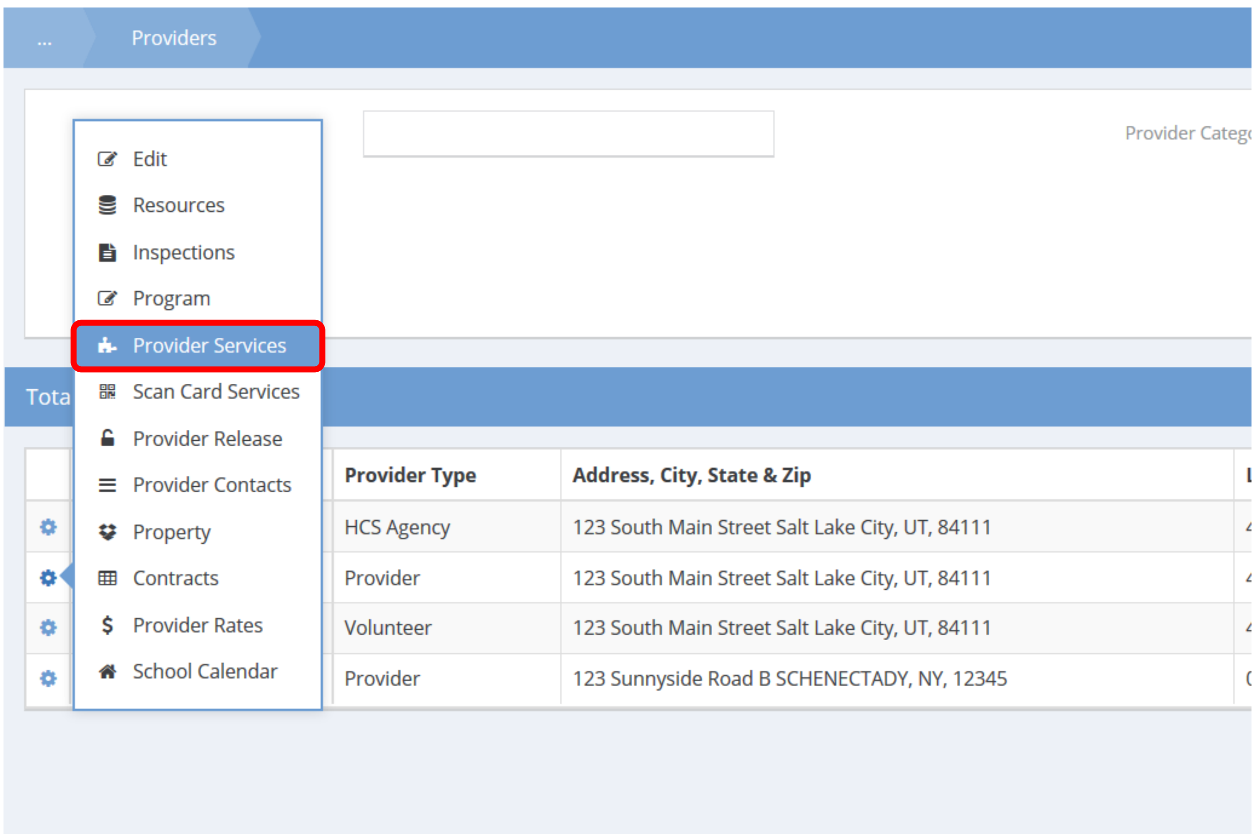
Click on the action gear icon associated with the desired organization. Select Providers from the menu options.



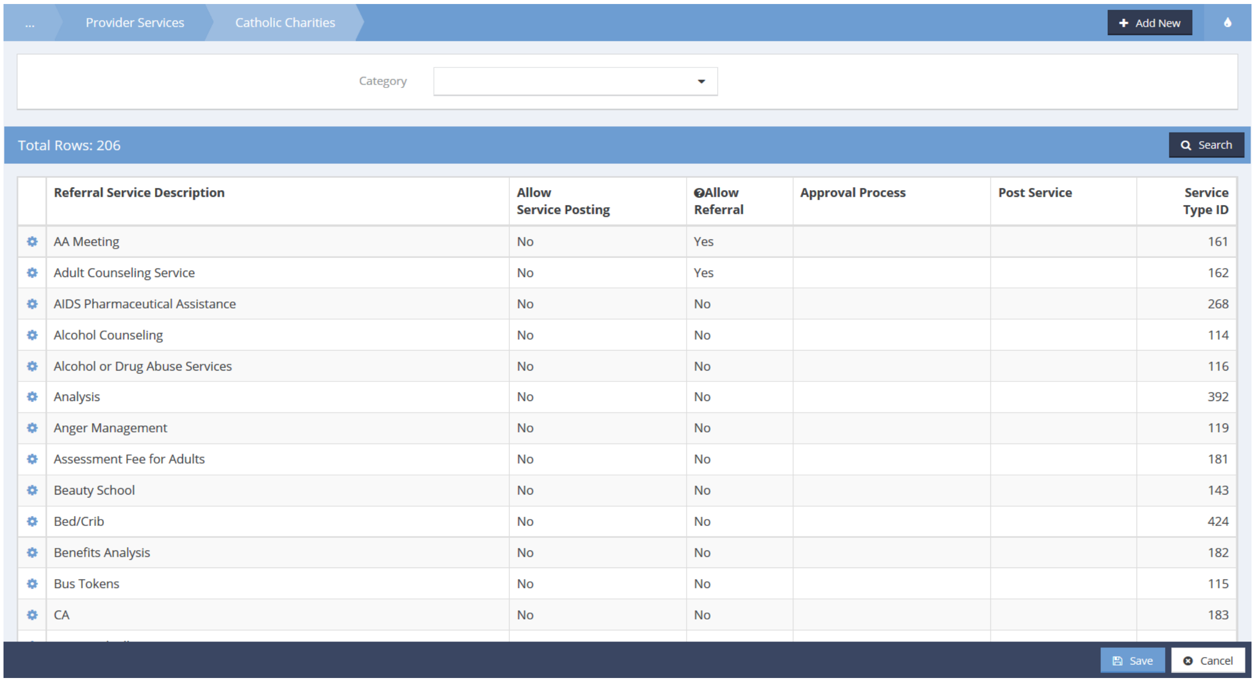
The Providers form displays.



Click on the action gear icon associated with the desired provider and select Provider Services from the menu options.

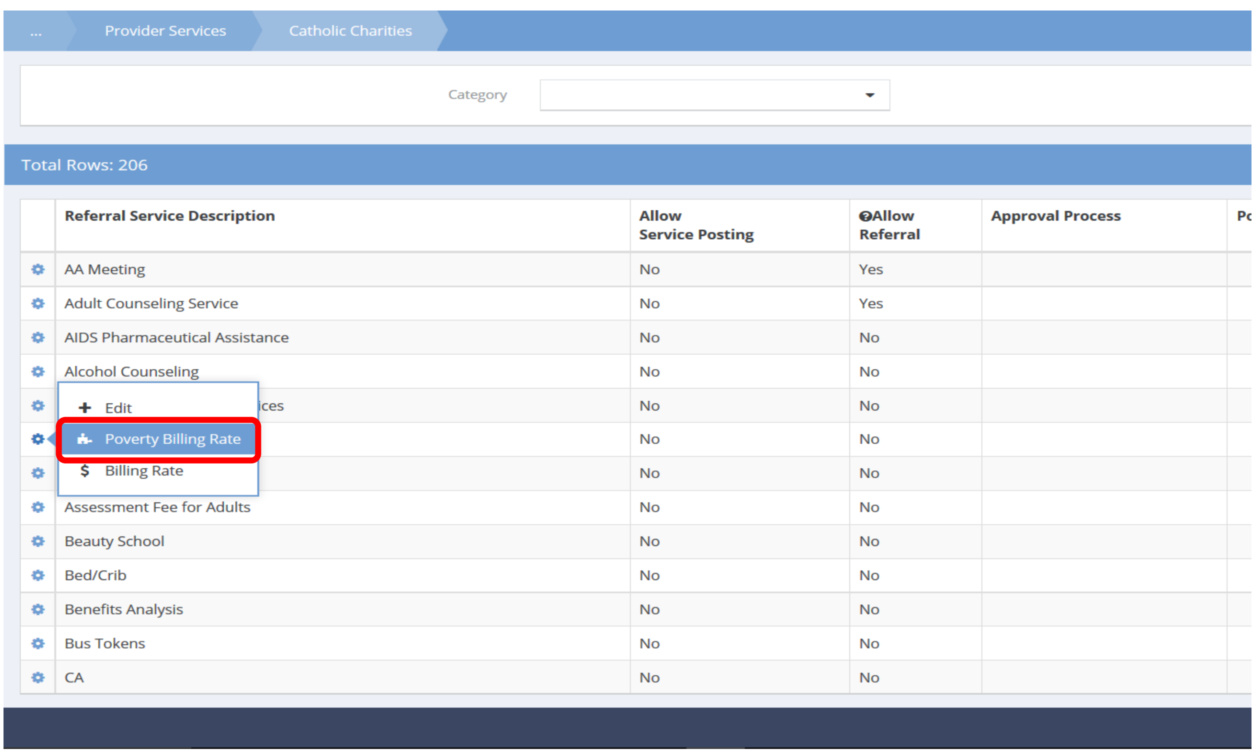


The Provider Services form displays.



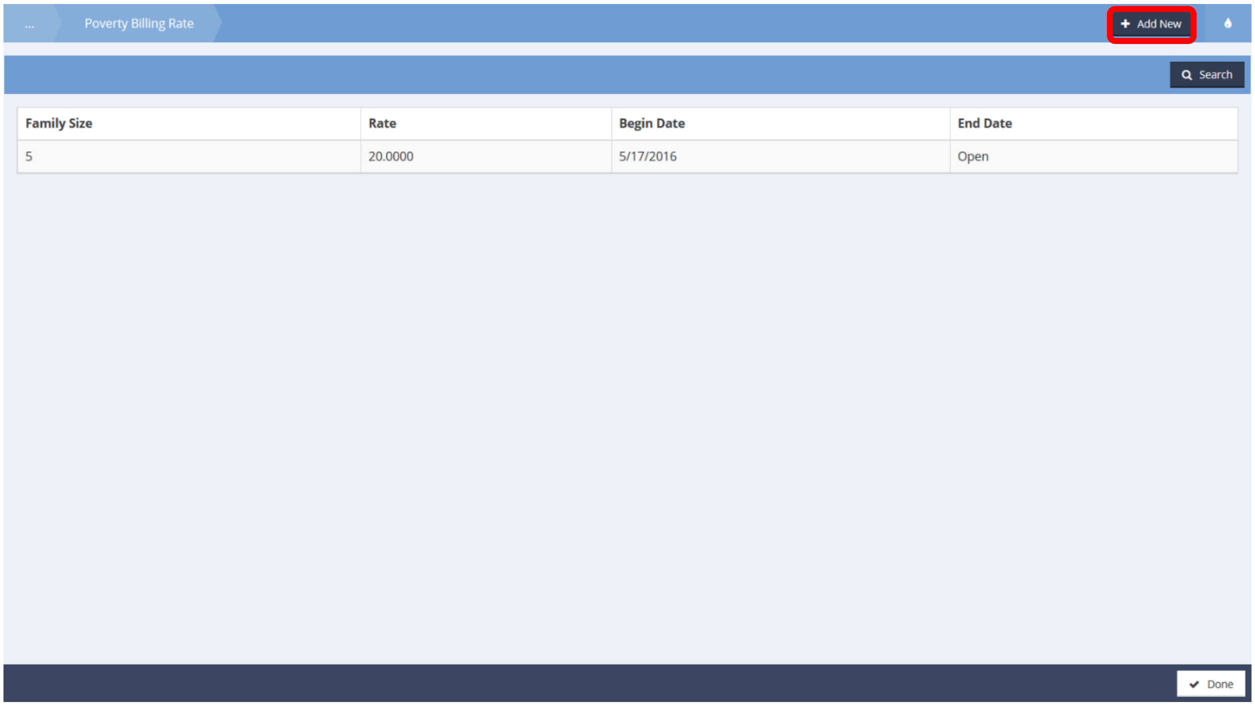
	Referral Service Description	Allow Service Posting	Allow Referral	Approval Process	Post Service	Service Type ID
	AA Meeting	No	Yes			161
	Adult Counseling Service	No	Yes			162
	AIDS Pharmaceutical Assistance	No	No			268
	Alcohol Counseling	No	No			114
	Alcohol or Drug Abuse Services	No	No			116
	Analysis	No	No			392
	Anger Management	No	No			119
	Assessment Fee for Adults	No	No			181
	Beauty School	No	No			143
	Bed/Crib	No	No			424
	Benefits Analysis	No	No			182
	Bus Tokens	No	No			115
	CA	No	No			183

Click on the action gear icon associated with the desired service and select Poverty Billing Rate from the menu options.



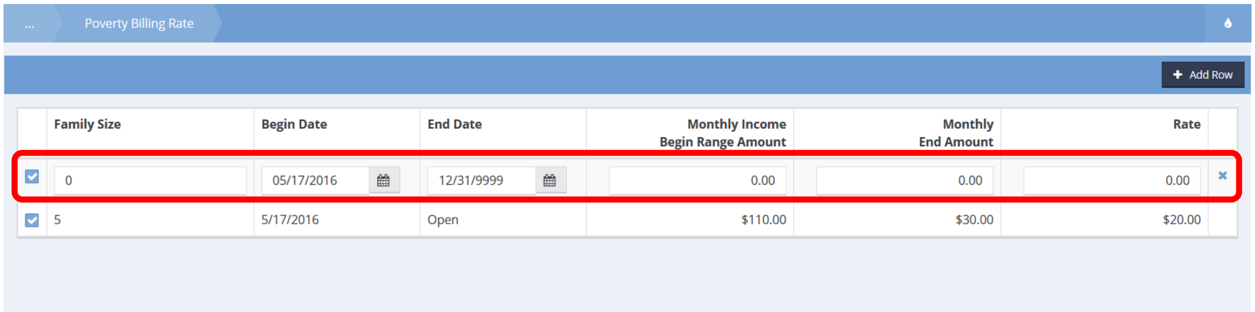
	Referral Service Description	Allow Service Posting	Allow Referral	Approval Process	Pc
	AA Meeting	No	Yes		
	Adult Counseling Service	No	Yes		
	AIDS Pharmaceutical Assistance	No	No		
	Alcohol Counseling	No	No		
	ces	No	No		
		No	No		
		No	No		
	Assessment Fee for Adults	No	No		
	Beauty School	No	No		
	Bed/Crib	No	No		
	Benefits Analysis	No	No		
	Bus Tokens	No	No		
	CA	No	No		

The Poverty Billing Rate form displays.

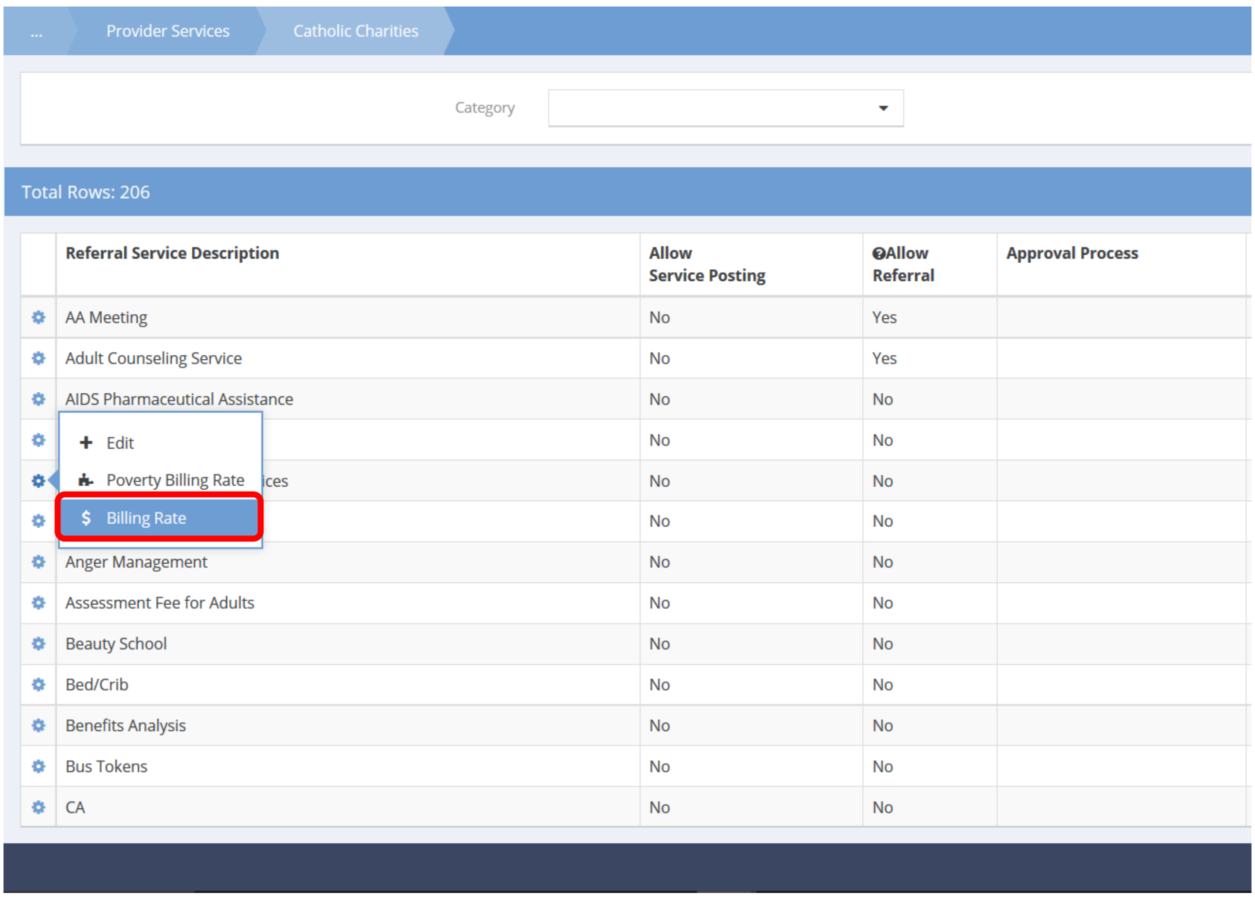


To add a new bill, simply click on the + Add New button. The Poverty Billing Rate Add form displays.

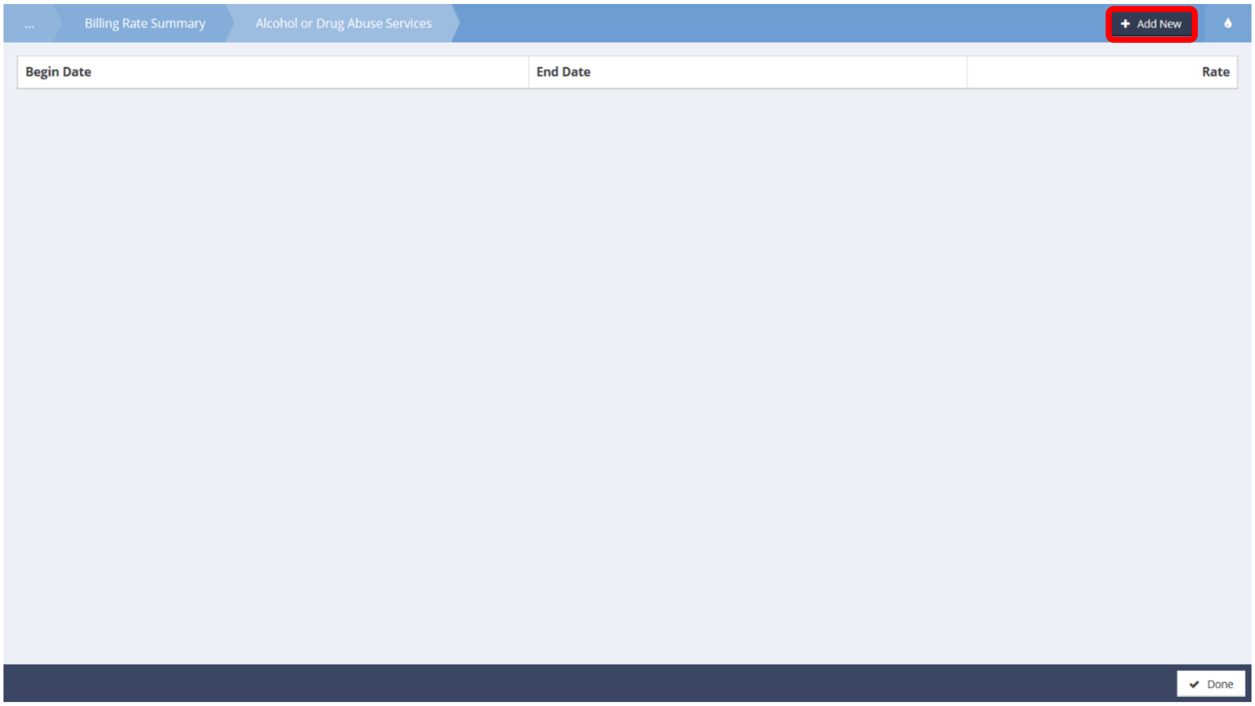
Existing entries display. Click the blue checkbox icon to edit or delete entry. Click on the + Add Row button to add a new entry. A new line appears.



Fill accordingly and click the Save button to save and exit. To view the billing rate summary, simply select Billing Rate from the menu options located on the Provider Services form.

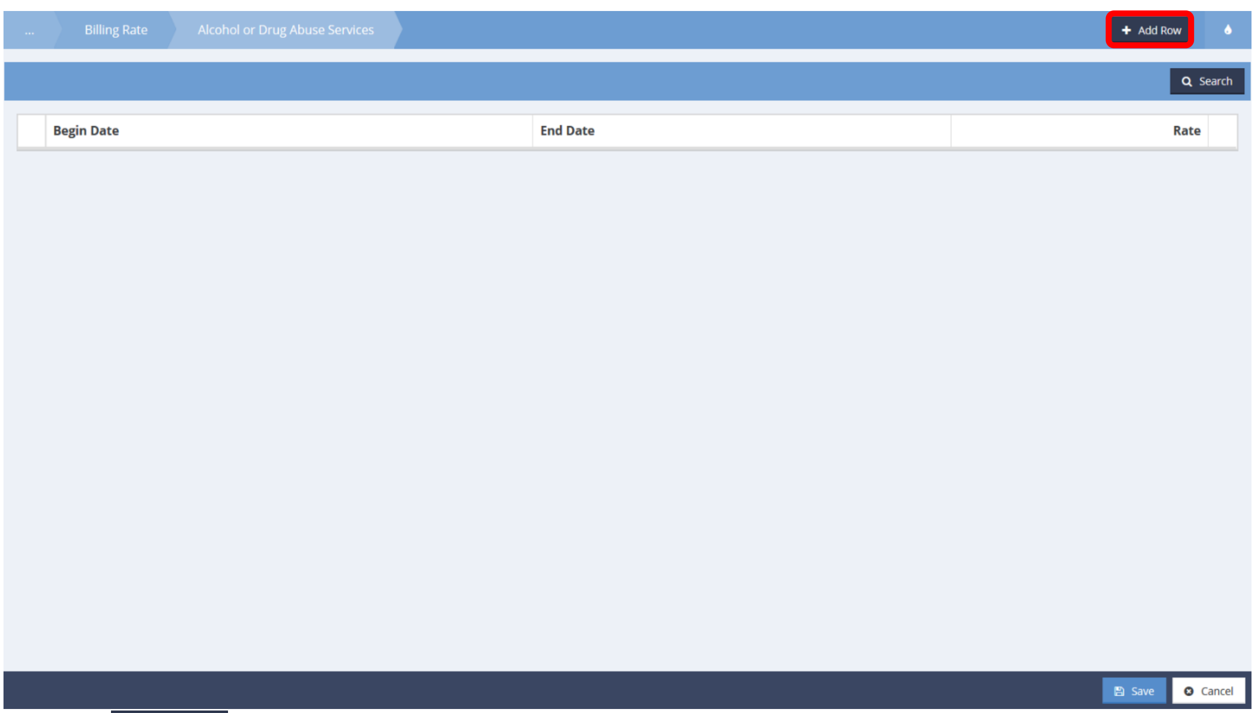


The Billing Rate Summary form displays.

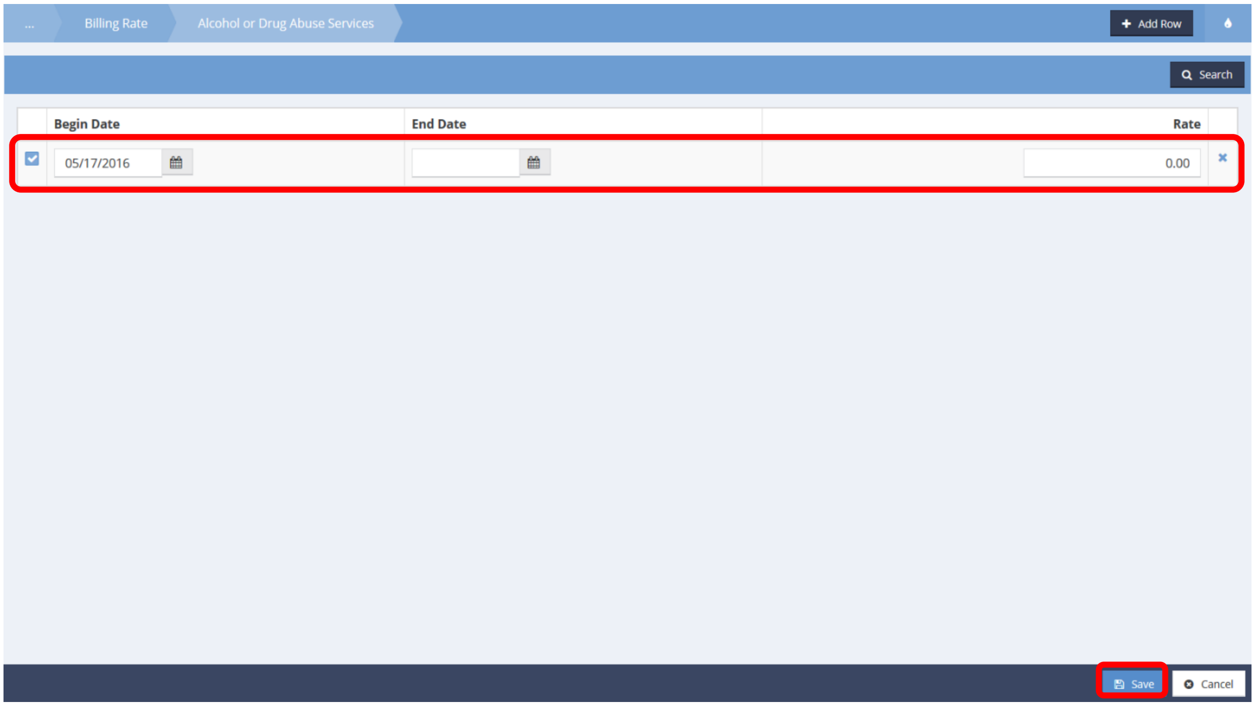


To add a billing rate, simply click on the + Add New button.

The Billing Rate form displays.



Click the + Add Row button to add another entry.



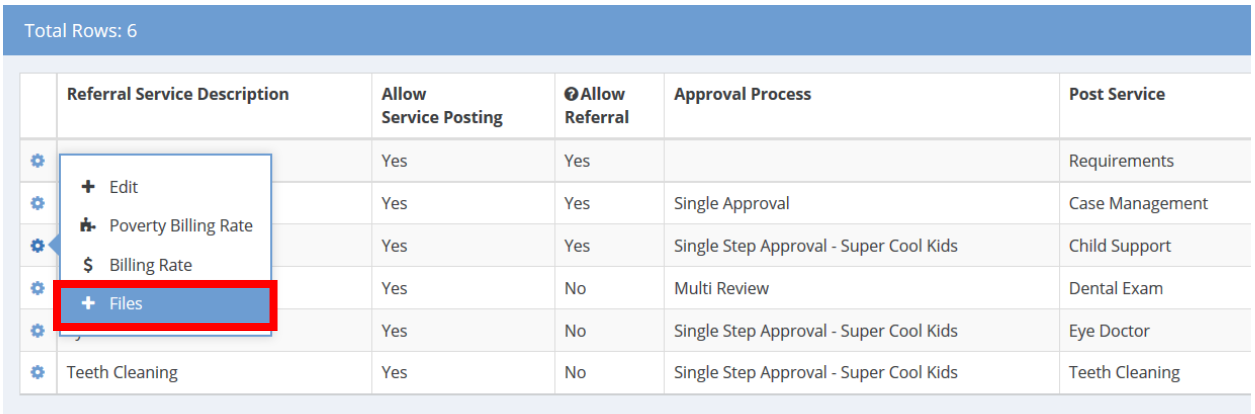
Enter information accordingly and click the Save button to save and exit.

Provider Service Files

Objective: Upload provider service files/documents.

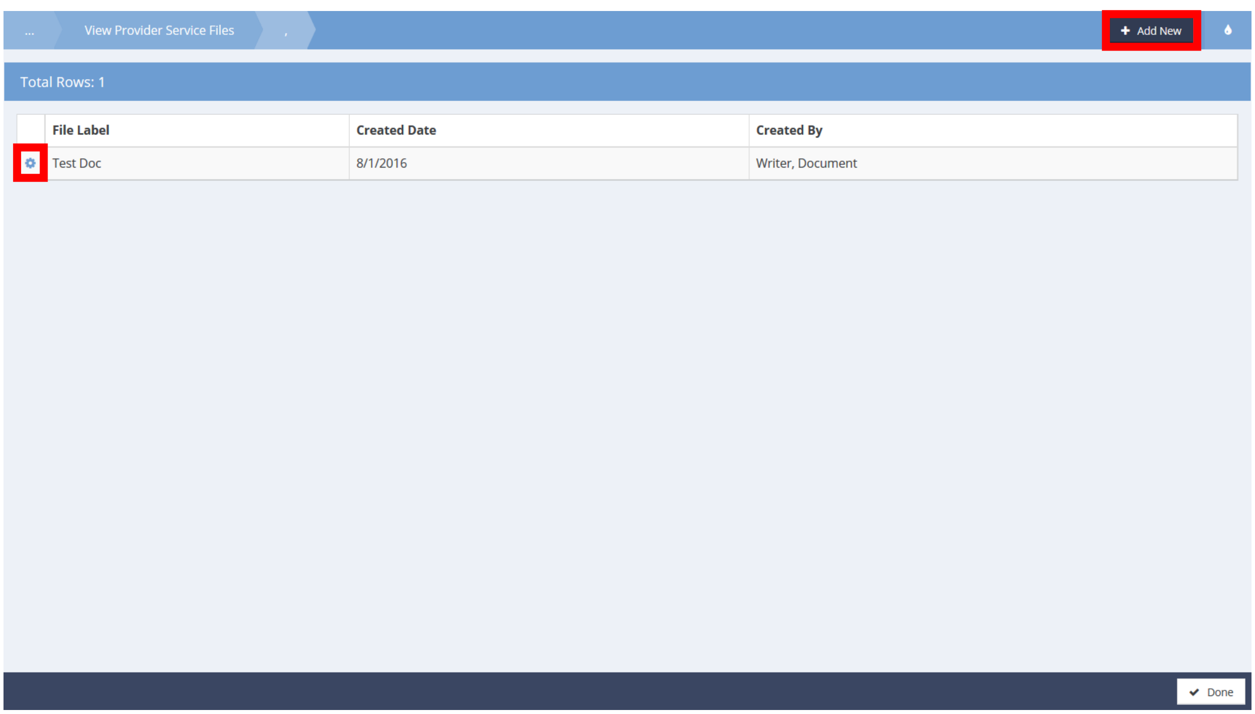
Navigation: Administration>Setup>Organizations

From the Provider Services form, click the action gear icon associated with the desired service. Select Files from the menu options.


Total Rows: 6

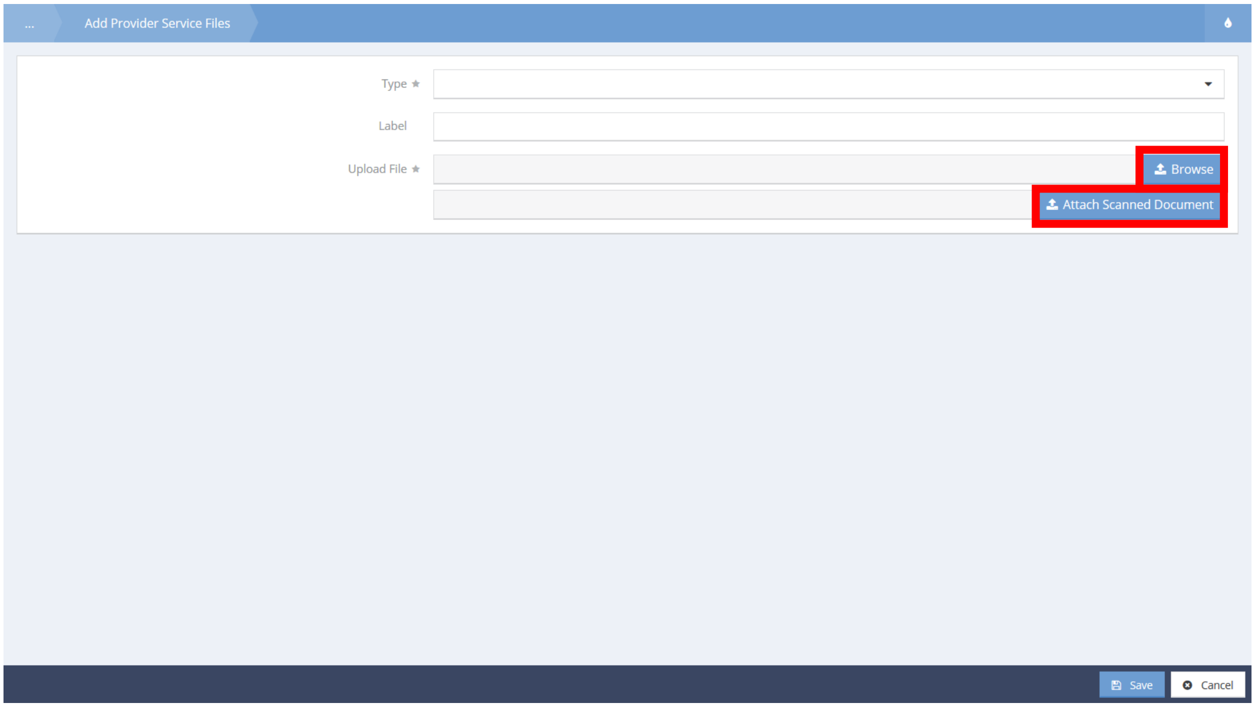
	Referral Service Description	Allow Service Posting	Allow Referral	Approval Process	Post Service
		Yes	Yes		Requirements
		Yes	Yes	Single Approval	Case Management
		Yes	Yes	Single Step Approval - Super Cool Kids	Child Support
		Yes	No	Multi Review	Dental Exam
		Yes	No	Single Step Approval - Super Cool Kids	Eye Doctor
	Teeth Cleaning	Yes	No	Single Step Approval - Super Cool Kids	Teeth Cleaning

The View Provider Service Files form displays.



Existing documents display. Click the action gear icon associated with the desired document to view the document or delete it. To add a new document, click the Add New button.

The Add Provider Service Files form displays.

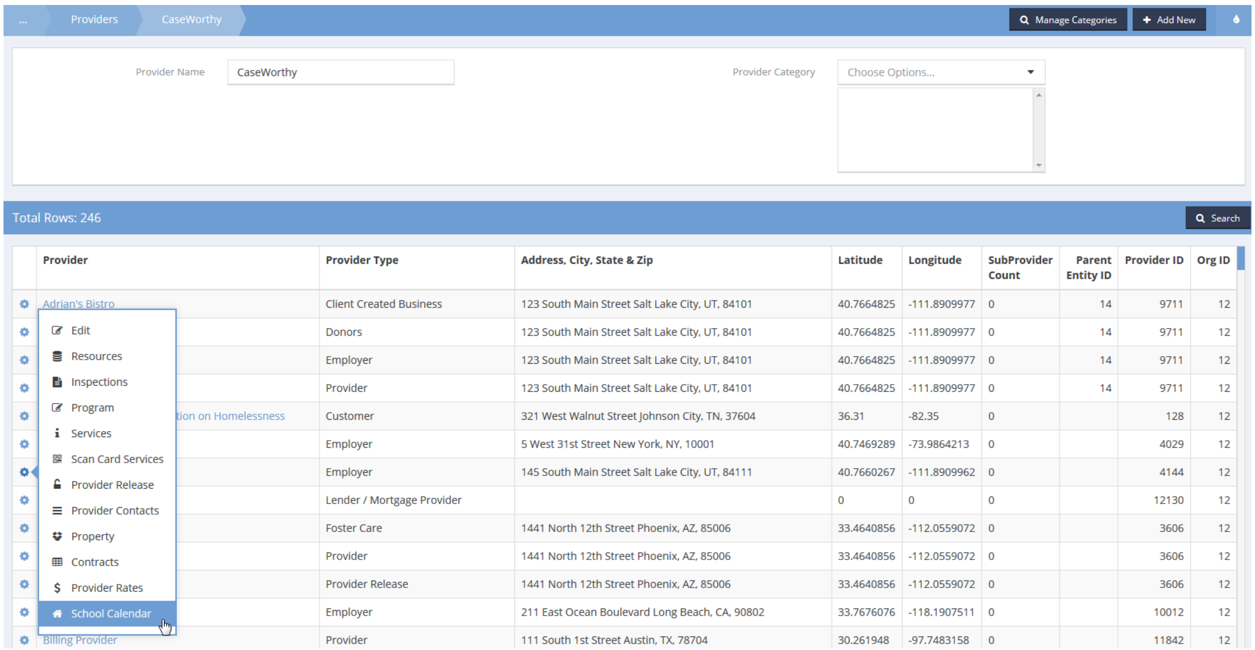


Select a Type from the drop-down list, add a label if desired. Click the Browse button to select a document to upload. Or, click the attached scanned document button to add a scanned document. Click the Save button to save and return to the View Provider Service Files form. Click the Done button on that form when finished.

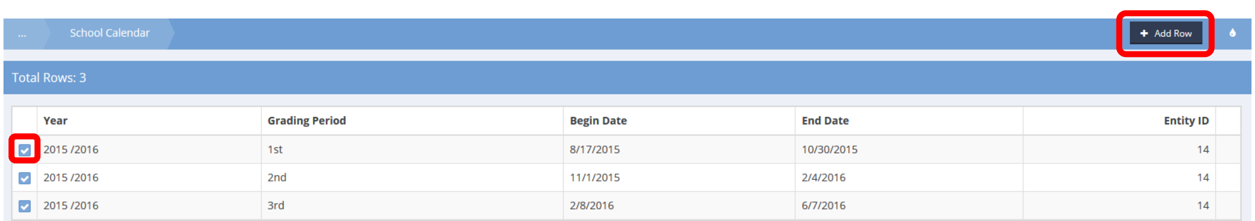
School Calendar

Objective: Create or edit school calendar for a provider.

From the Providers form, click the action gear associated with the desired provider and select School Calendar from the pop up menu that appears.

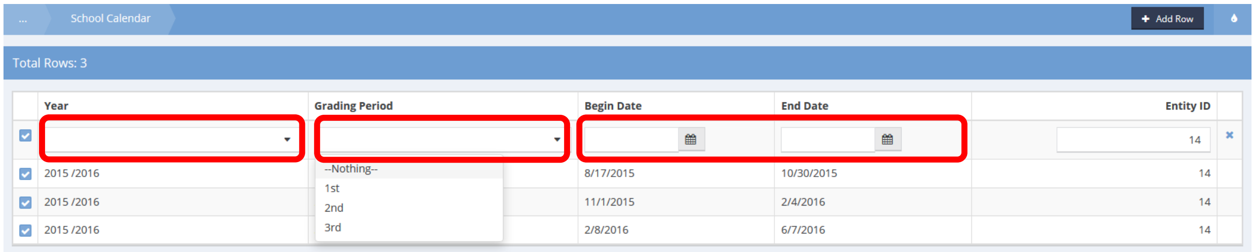


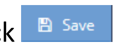
The School Calendar form displays.



To edit an existing item, click the blue checkbox icon to expand the row. To create a new item, click the **+ Add Row** button.

A new, expanded row appears.

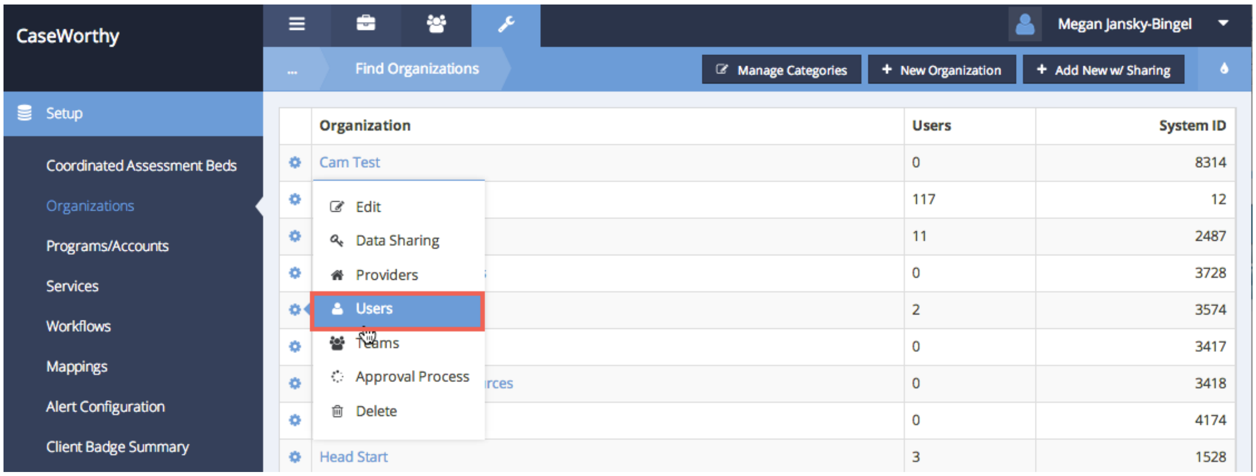


Enter a date range and select a year and grading period from the drop-down lists. Click  when finished.

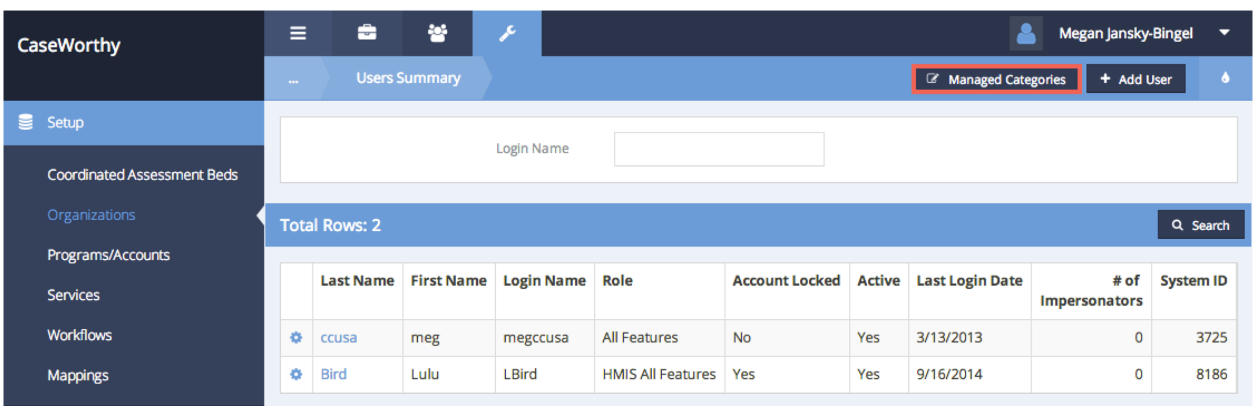
User Setup

(Administration>Setup>Organizations)

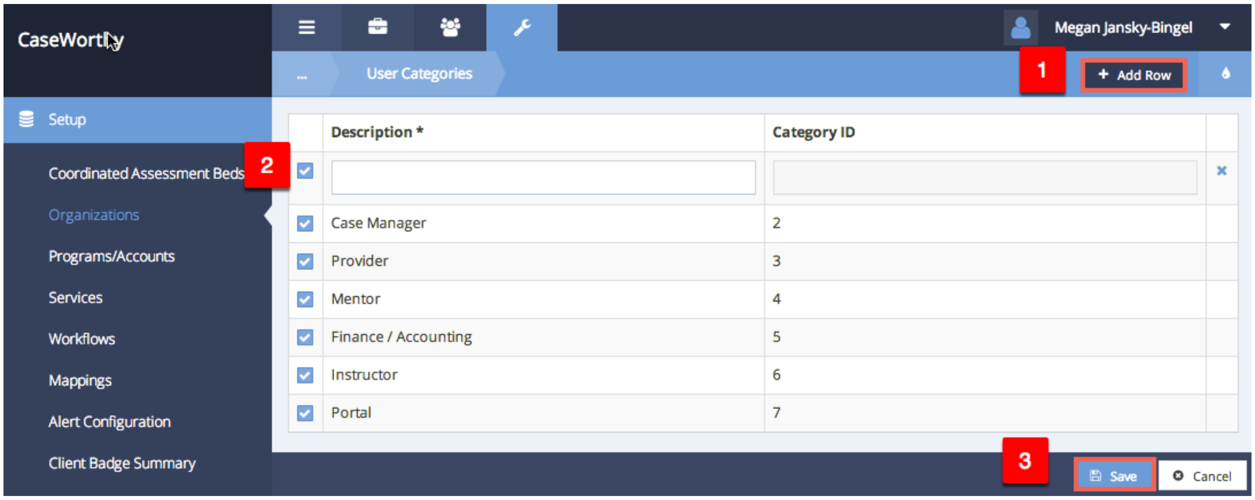
To add users associated with the organization, click on the action gear and select “Users” from the pop up menu that appears.



The User summary form displays. Users can be associated with categories. To create new or manage existing user categories, click on the Manage Categories button on the top right of the form.

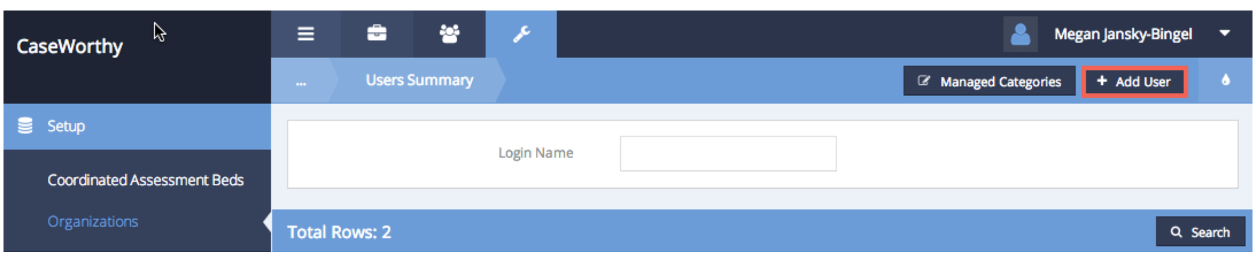


The User Categories form appears.

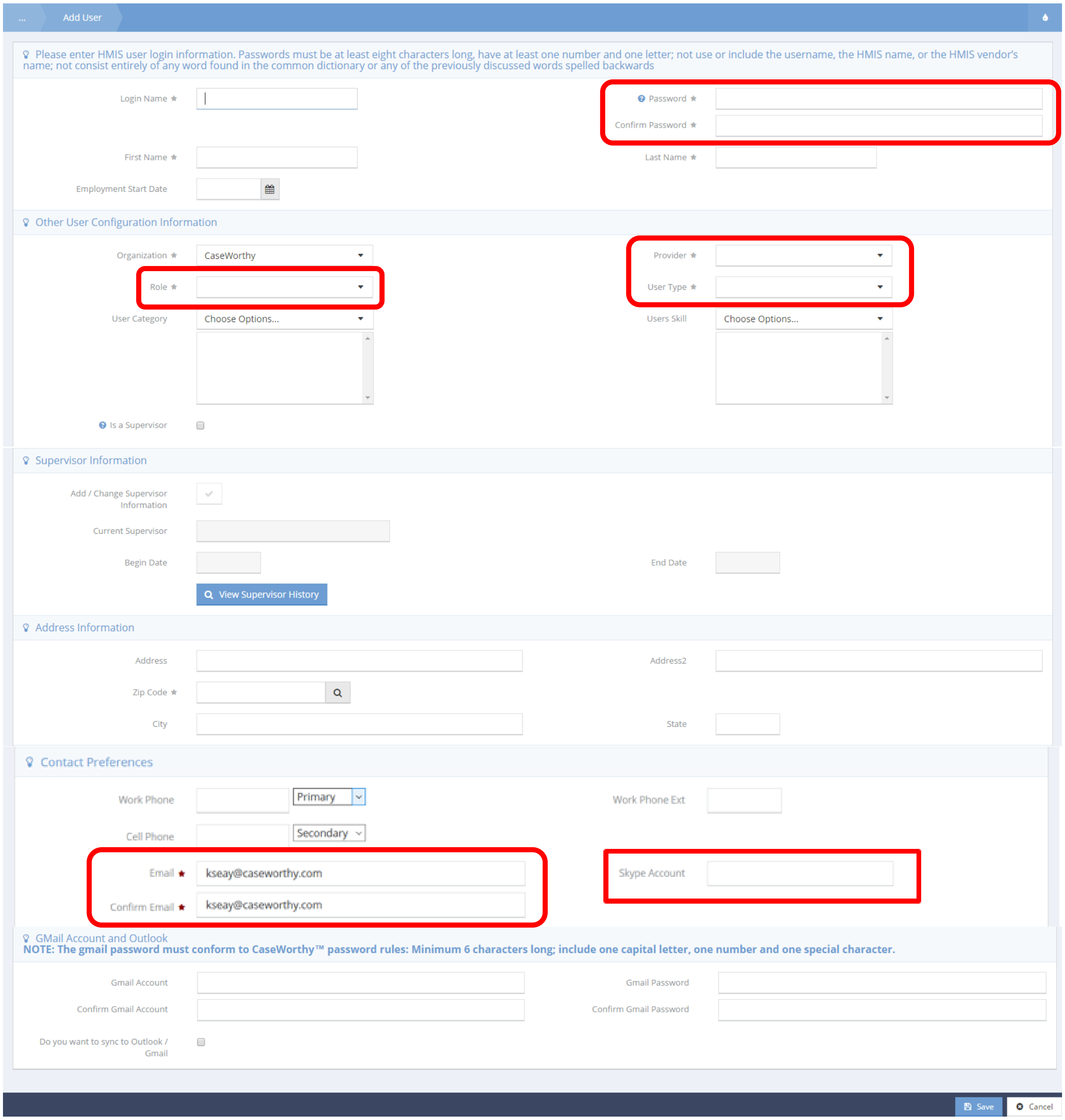


Click the + Add Row button to add rows to the form. A new, expanded row appears.

Enter any desired category descriptions. When all desired categories have been entered, click the Save button on the bottom right side of the form. The Users Summary form displays. To add a new user, click the + Add User button on the top right.

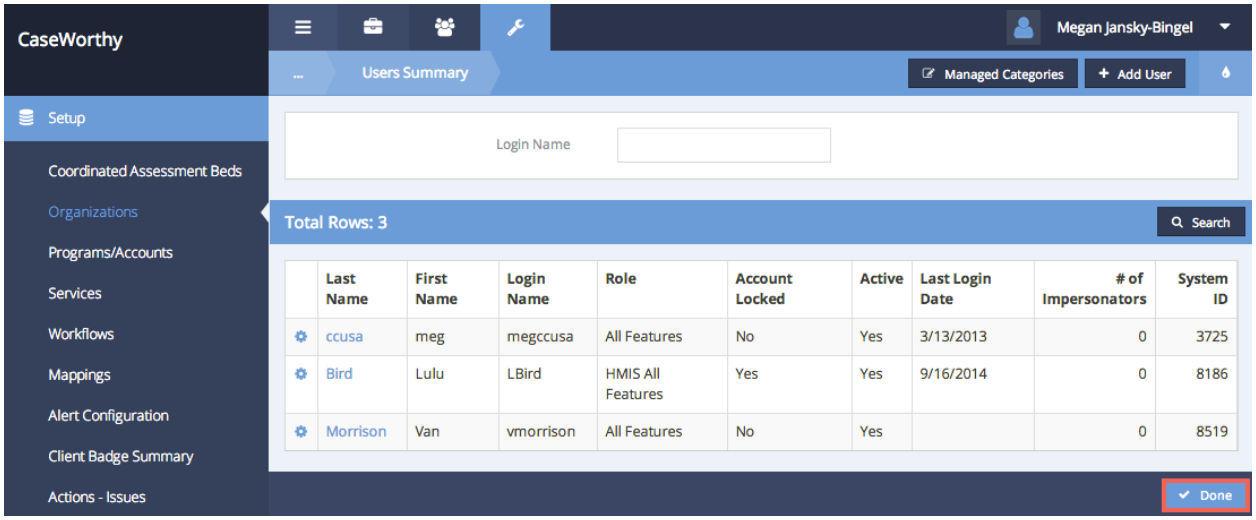


The Add User form displays. Enter all relevant and required information.



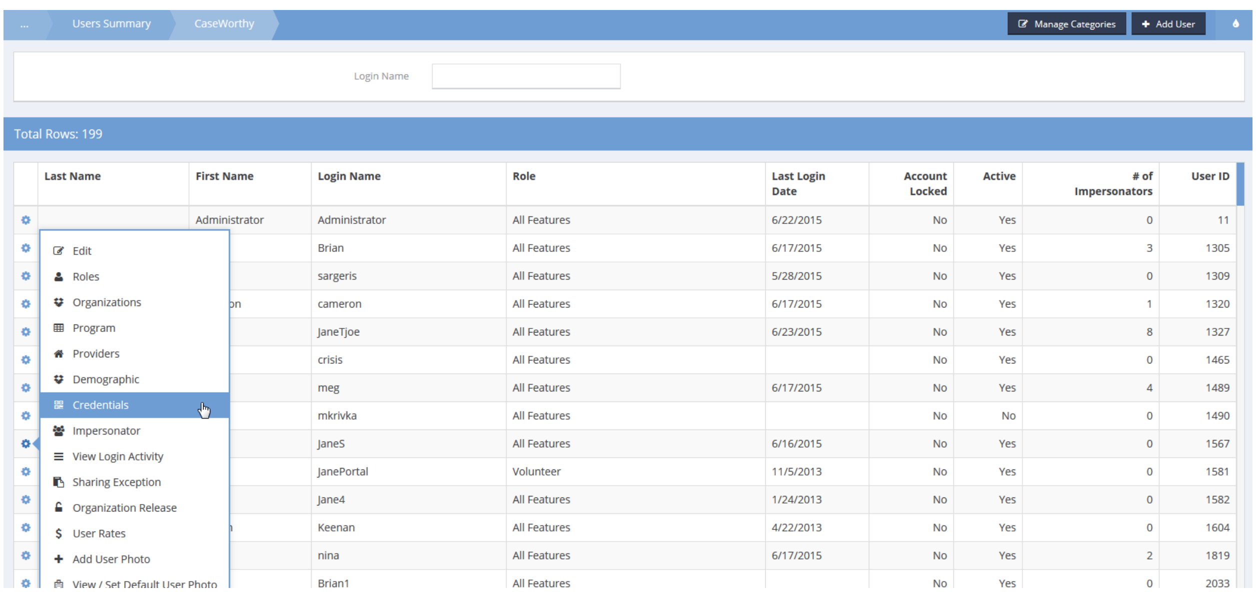
Be sure to follow the criteria at the top of the page for setting up a system password. Default password standards require that passwords be between 6 and 20 characters long; include one capital letter, include one number and one special character. i.e. (!@#$%^&*{(}\[/]. HMIS Password Standards are visible in the screen shot above. Use the Provider field to indicate the user's primary location. Use the Role drop down list to set up the user's default role. Most users are assigned to the Authenticated User type. Only System Administrators should be allowed to Alter Any Role. It is optional to identify user categories and skills. Supervisor and contact information, including Skype Account, is also optional, with the exception of the user email. Click the Save button on the bottom right of the form after all desired data has been entered.

The User summary form displays. Click Done on the bottom right side of the form. The Organization summary form presents.

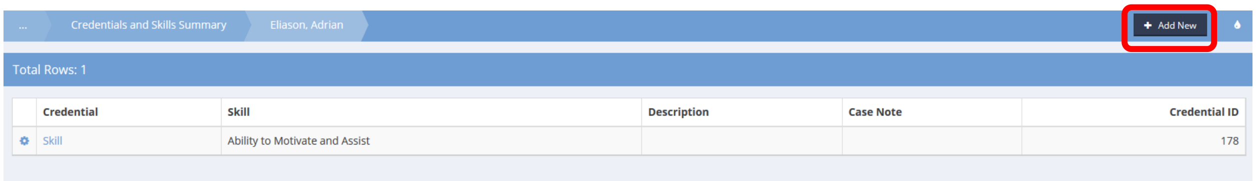


User Credentials and Skills

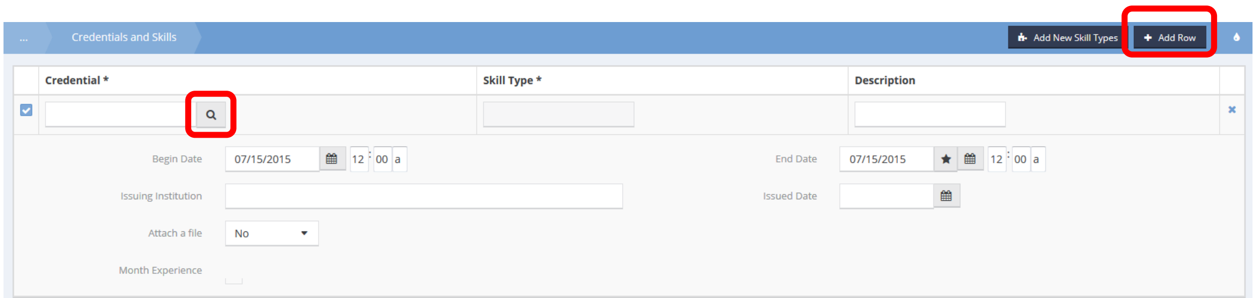
(Administration>Setup>Organizations>Users)



On the desired user, click the action gear icon and click Credentials. The Credentials and Skills Summary form displays.

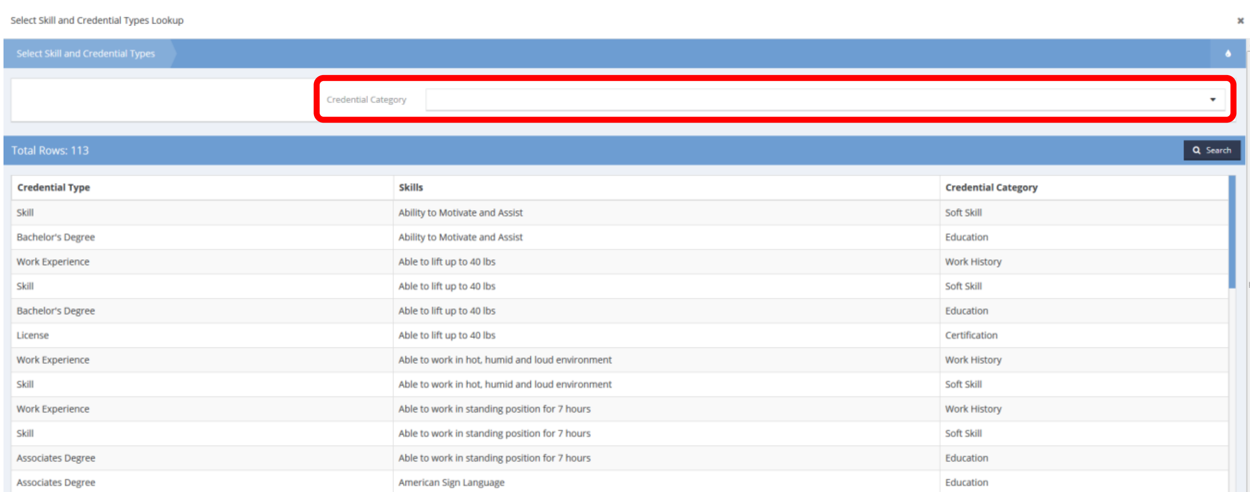


To add a new skill, click the Add New button. The Credentials and Skill form displays.

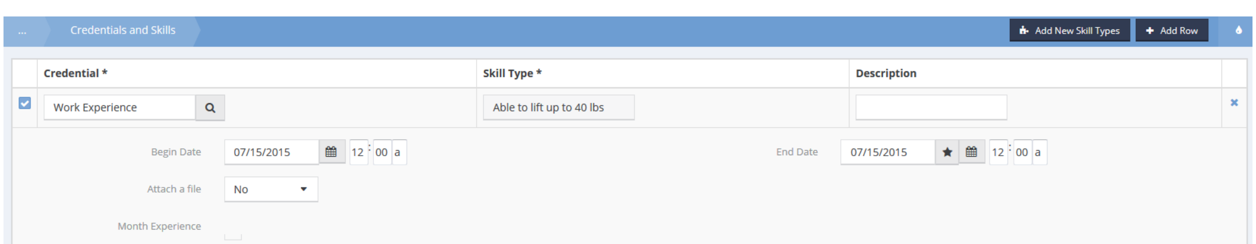


To add multiple items, click the Add Row button. Click the magnifying glass lookup icon to add a credential.

The Select Skill and Credential Types Lookup form displays.

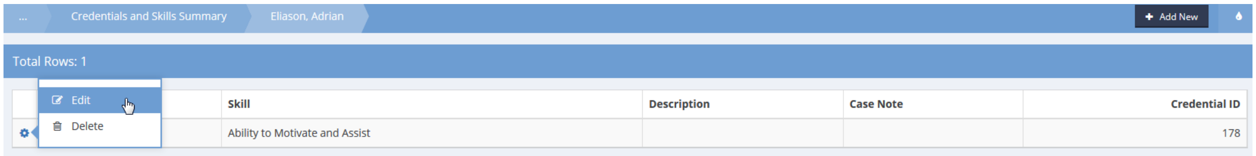


Use the category drop down list to filter the list and click the desired skill once located.



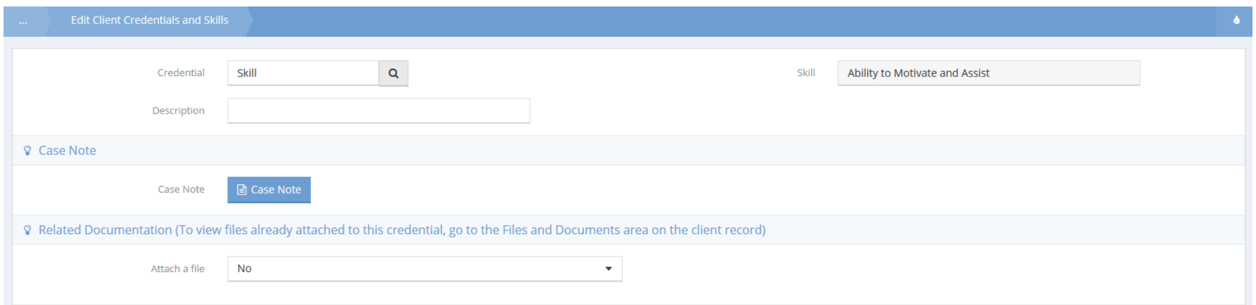
The form updates with the selected skill. Enter any other relevant information and click 

when finished.



To edit an existing skill, click the action gear  icon and click Edit.

The Edit Client Credentials and Skill form displays.



Make any desired changes and click 

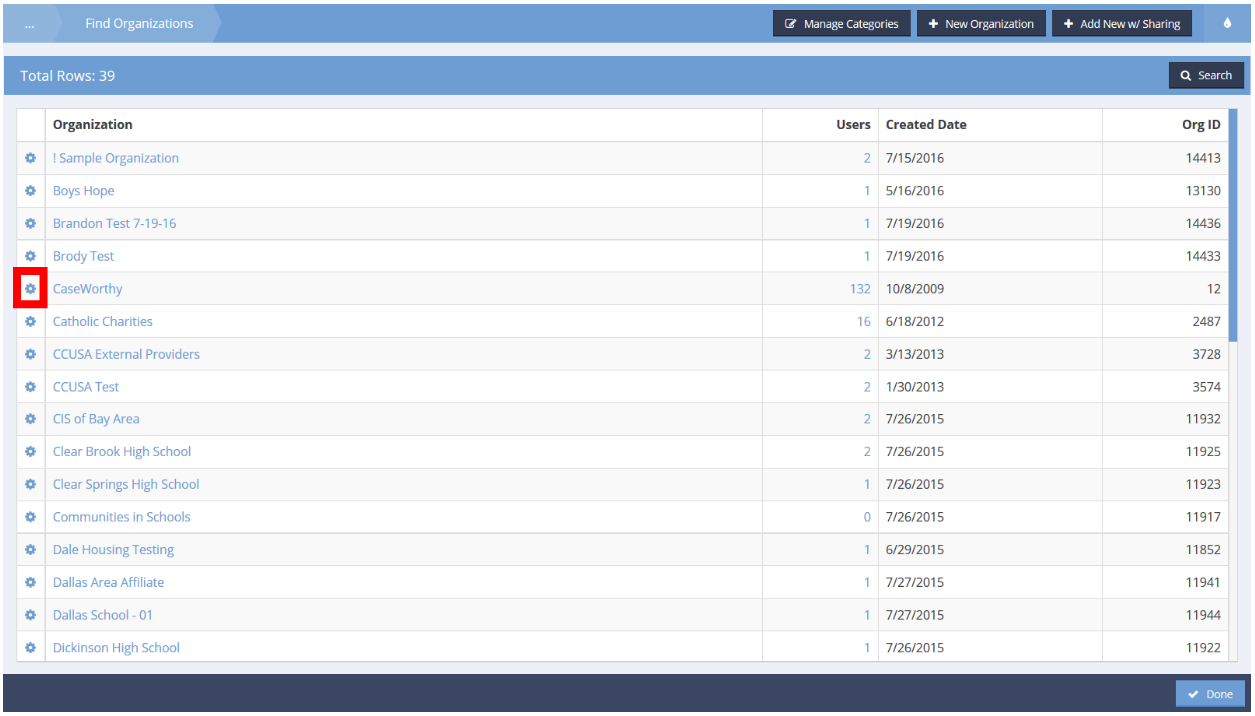
when finished.

Sharing Exception

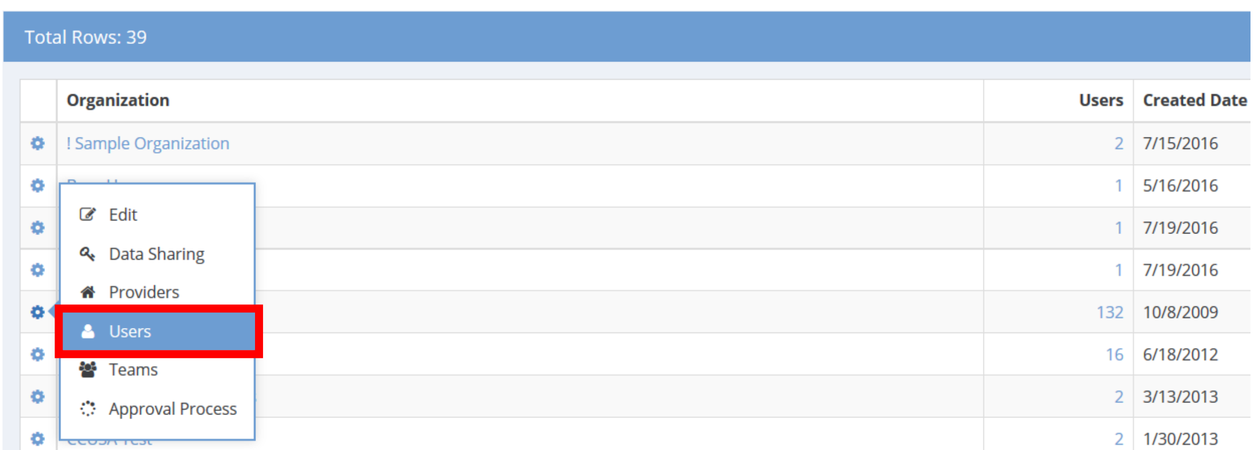
Objective: Manage organization sharing by User.

Navigation: Administration>Setup>Organizations

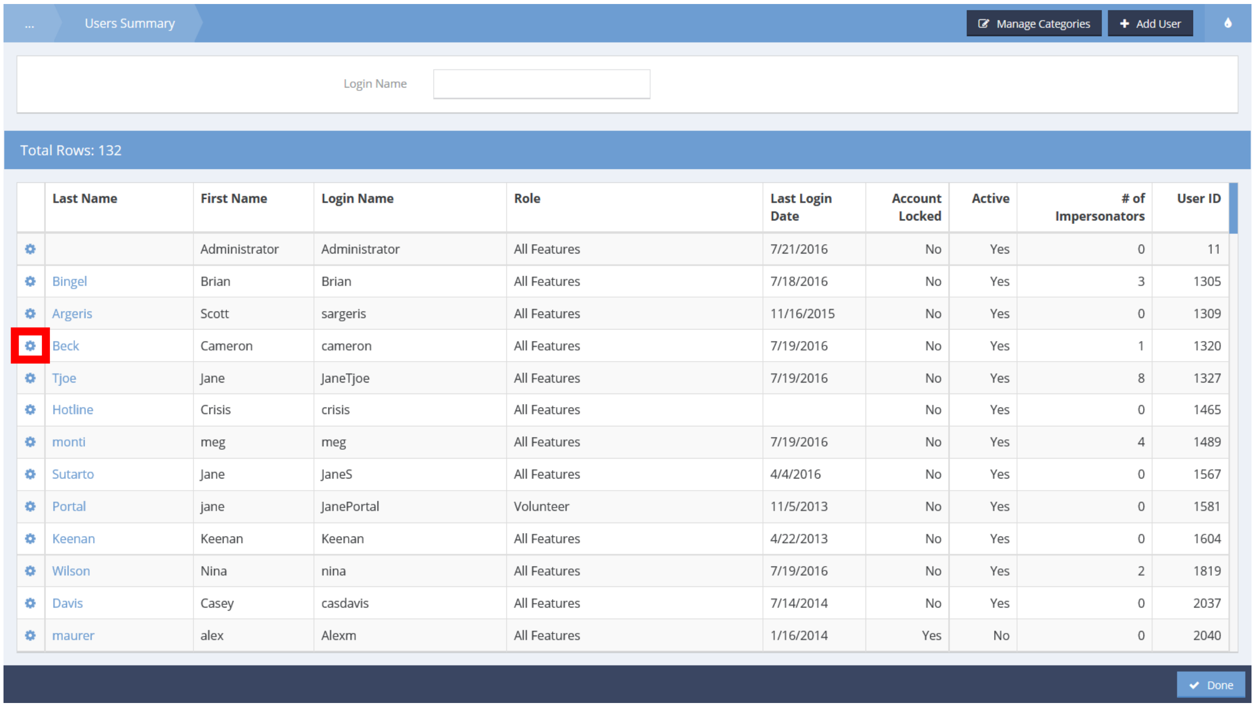
The find organizations form displays.



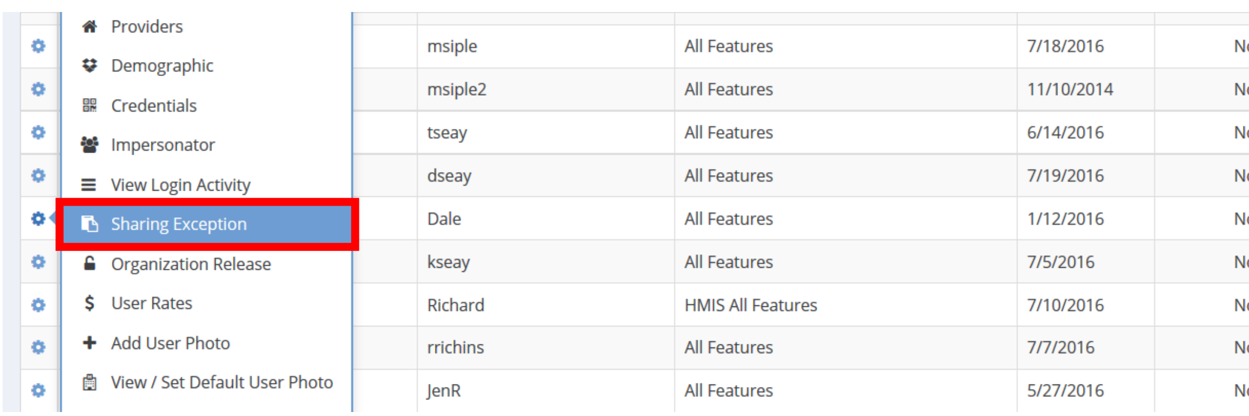
Click the action gear icon associated with the desired organization. Select Users from the menu options.



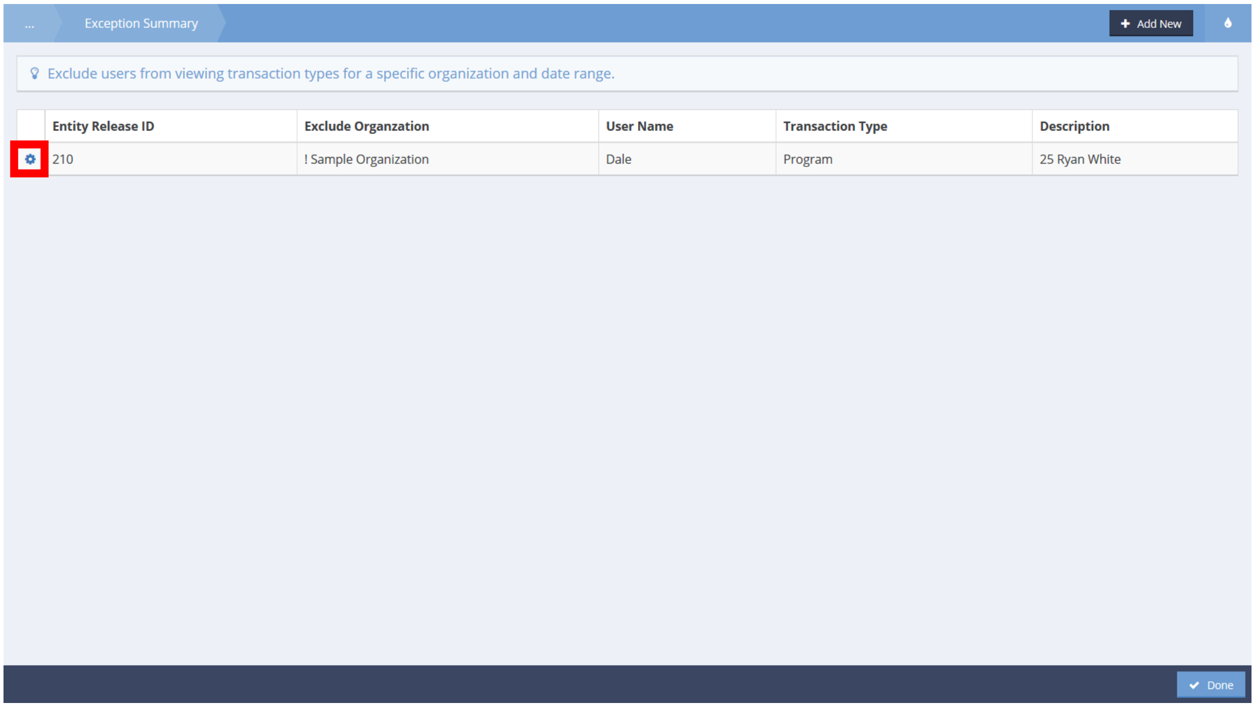
The Users Summary form displays.



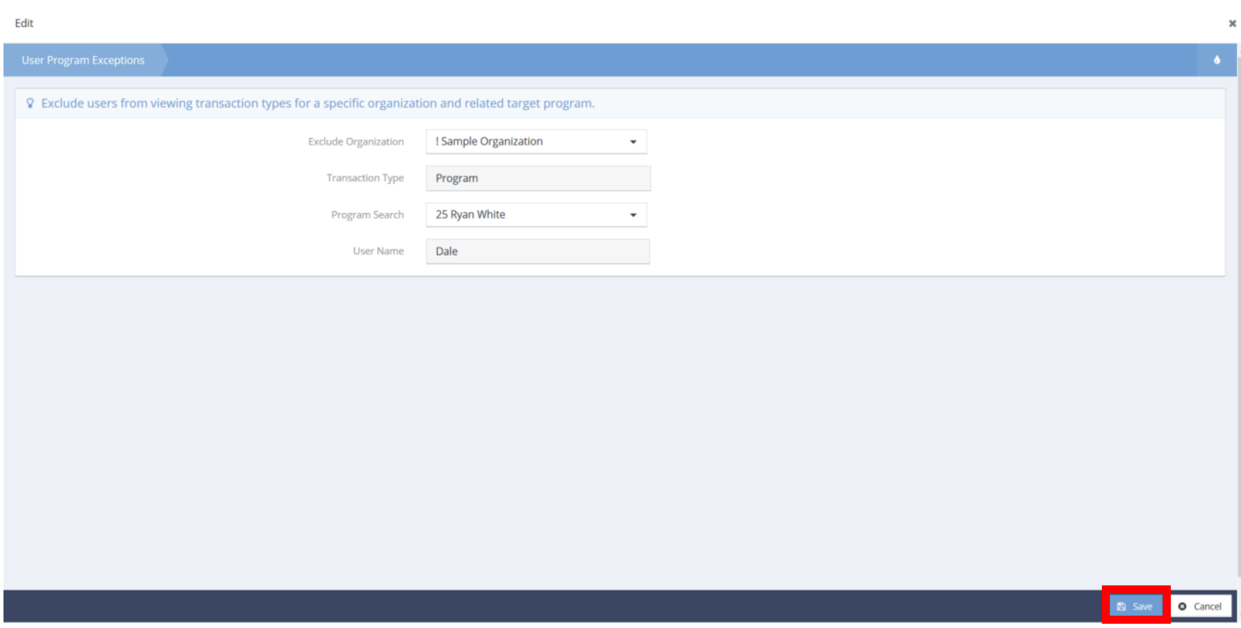
Click the action gear icon associated with the desired user. Select Sharing Exception from the menu options.



The Exception Summary form displays.



Click the action gear icon associated with the desired exception and select Edit from the menu options. The User Program Exceptions form displays in a new pop-up window.



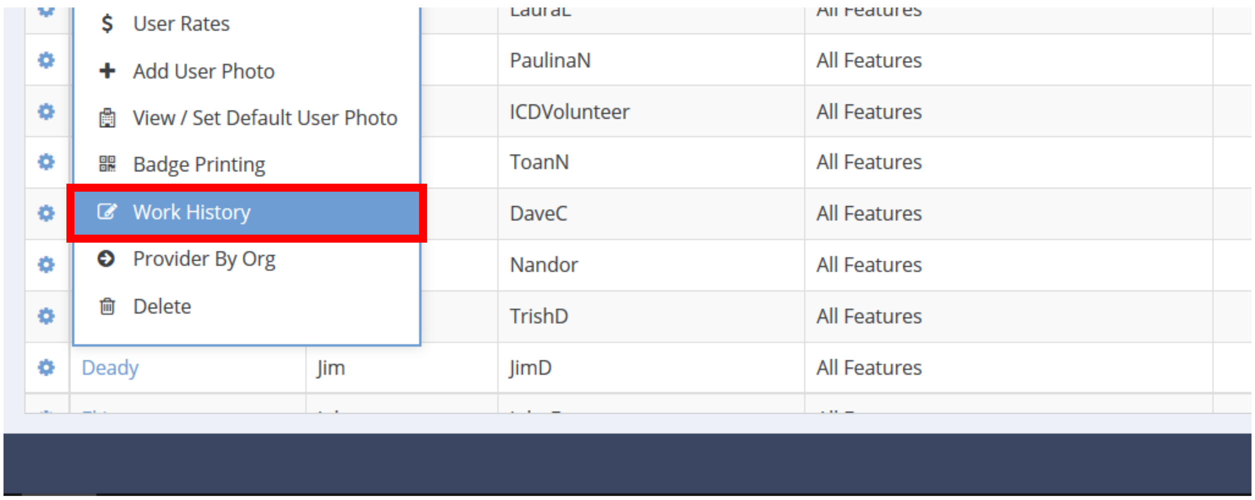
Edit the Organization being excluded from that user's access, name and/or provider if desired. Click the **Save** button to save and exit.

Work History

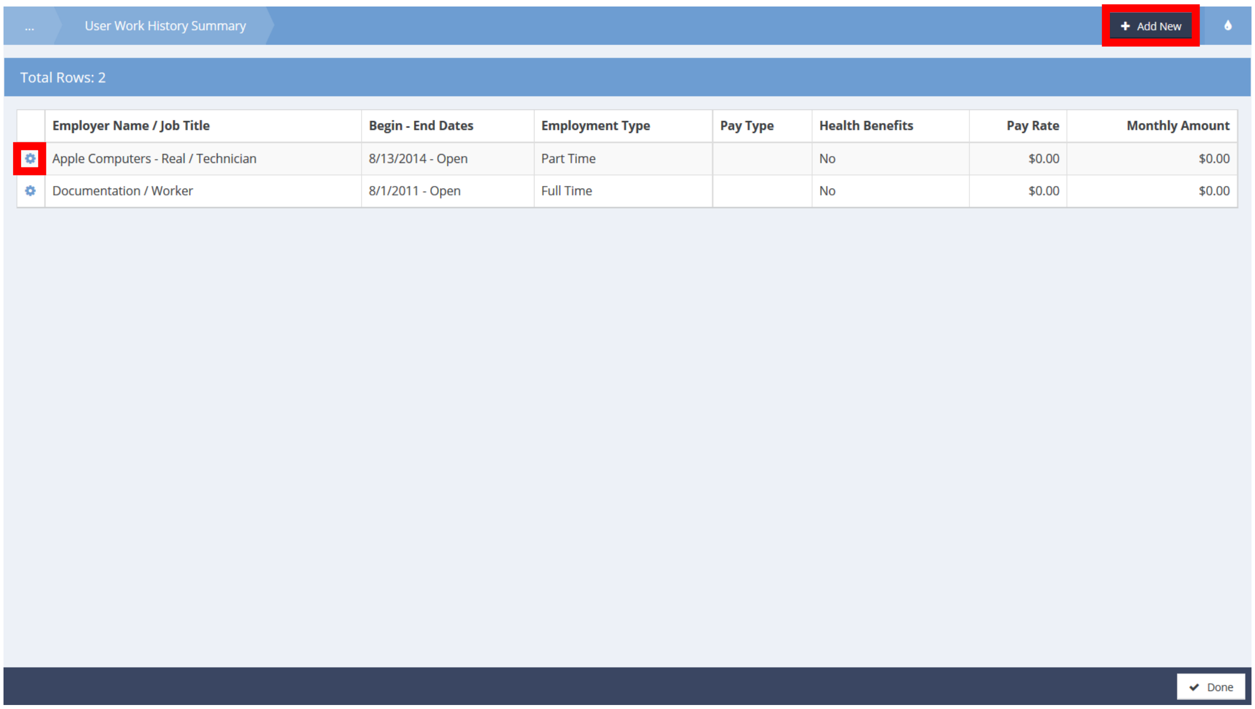
Objective: Input and edit User work history.

Navigation: Administration>Setup>Organizations>Users

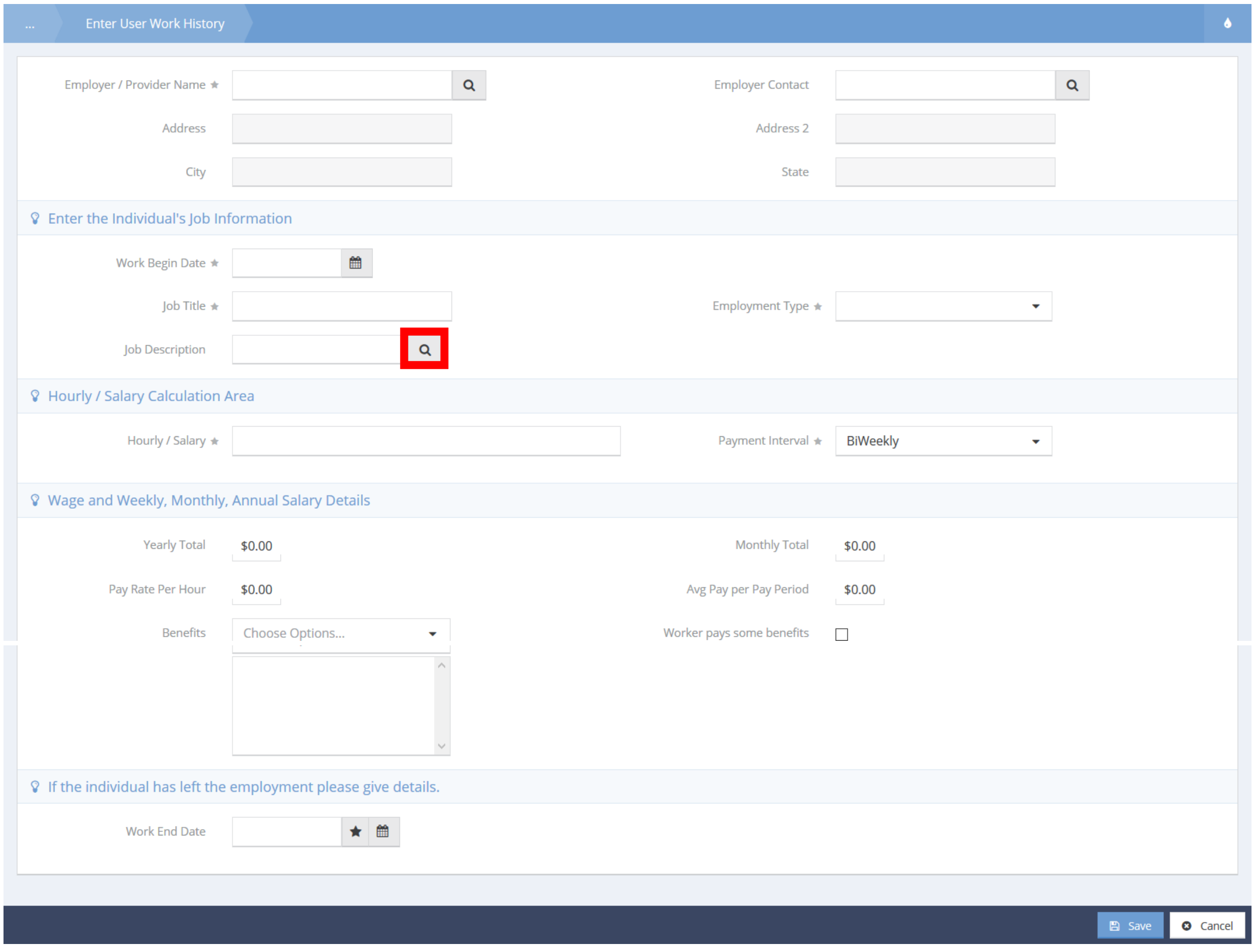
Select Work History from the menu options from the Users Summary form action gear icon.

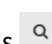


The User Work History form displays.

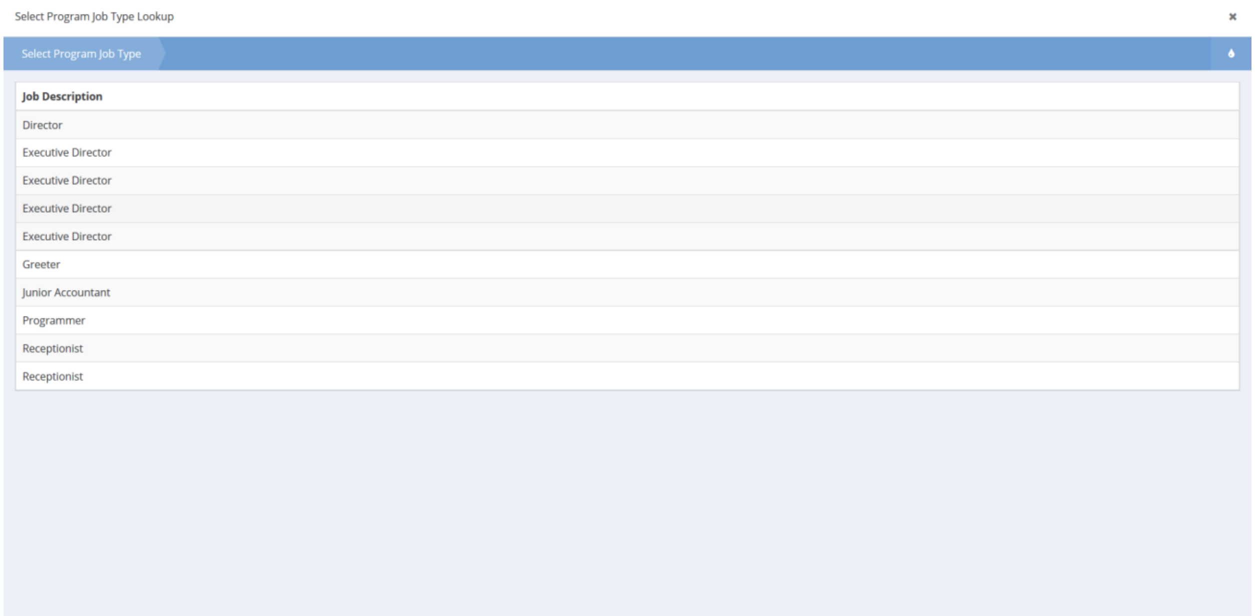


Click the action gear icon to Edit, view Work History Journal, or Delete. To add a new work history entry, click the Add New button.



Select an employer, work begin date, job title, employment type, salary, payment interval and enter information to any remaining fields as desired. To select a job description, click the magnifying glass  icon.

The Select Program Job Type form displays in a new pop-up window.



Select a job description. The form closes upon selection. Click the 

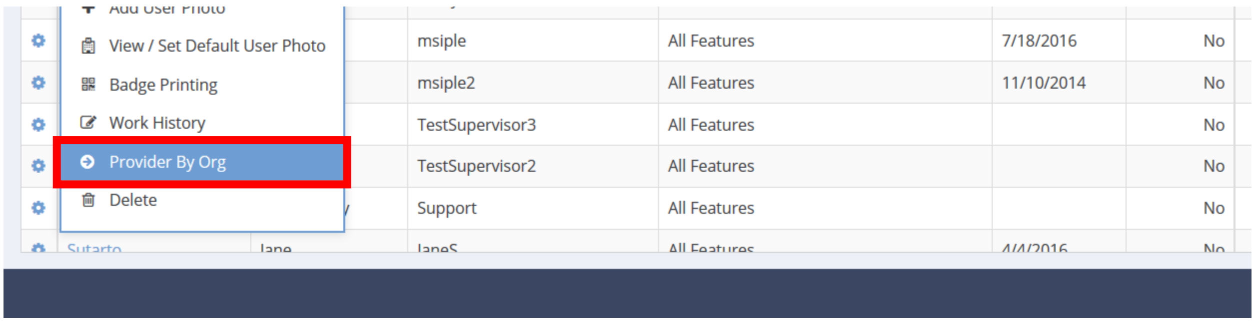
button to save and exit.

Provider By Org

Objective: View providers linked to user specific organizations.

Navigation: Administration>Setup>Organizations>Users

Select Provider by Org from the action gear menu from the Users Summary form.



The Find Provider by all User Org displays.

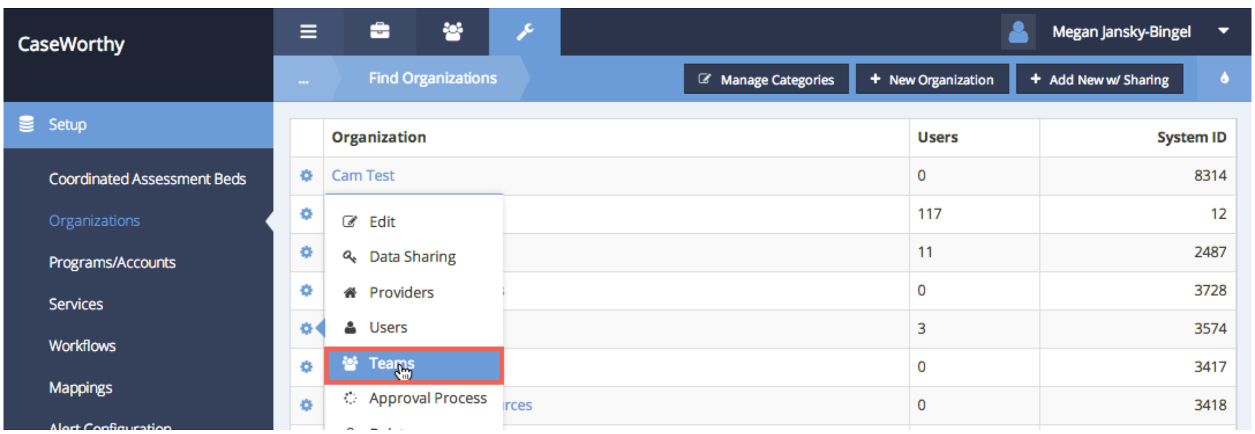
Providers under organizations the user is associated with, display. Click the Save button to save and exit.

Teams

(Administration>Setup>Organizations>Users)

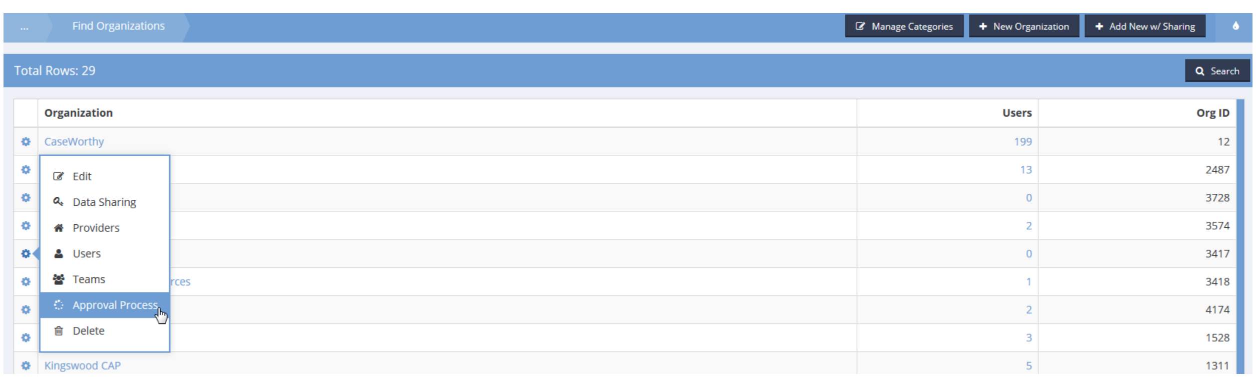
Teams can be used for two primary purposes in CaseWorthy™ – as approval groups or as task-oriented groups. When a team is linked to an approval process, it becomes an approval group, which gives members the authority to approve certain actions within the system such as payments, incident reports, services, etc. To link a team to a process and create an approval group, see the Approval Processes section of this manual.

Teams can be used to create groups of users who can be assigned to certain tasks, such as housing or employment follow-ups, mentoring teams, drug testing, etc. To create a team, select the action gear next to the organization's name and click on "Teams" in the drop-down menu. This brings the user to the Teams form, from which teams and team members can be added or edited. This functionality can also be accessed by selecting Programs/Accounts from the side bar menu. A complete description is found in the Approval Groups/Teams section of this manual.

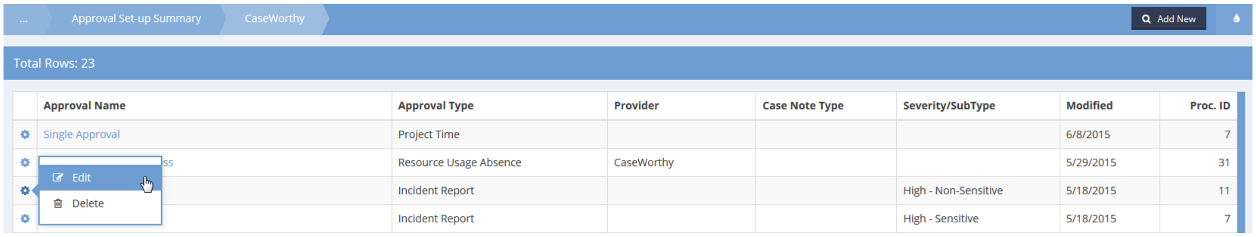


Approval Process Edit

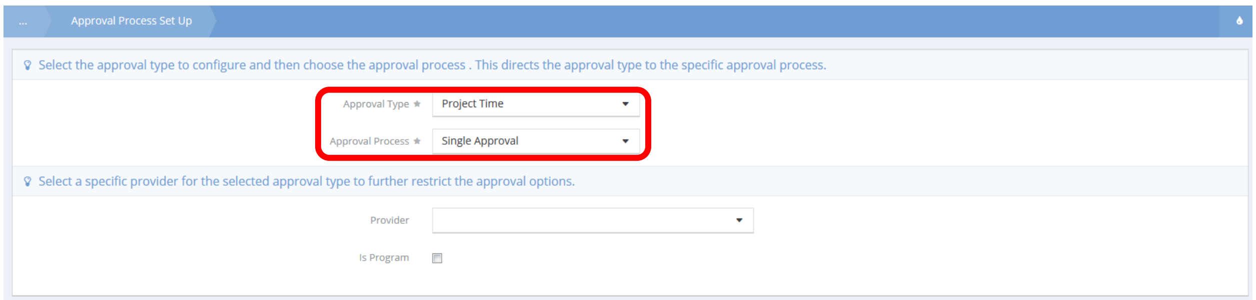
(Administration>Setup>Organizations)



On the desired organization, click the action gear icon and click Approval Process. The Approval Set up Summary form displays.



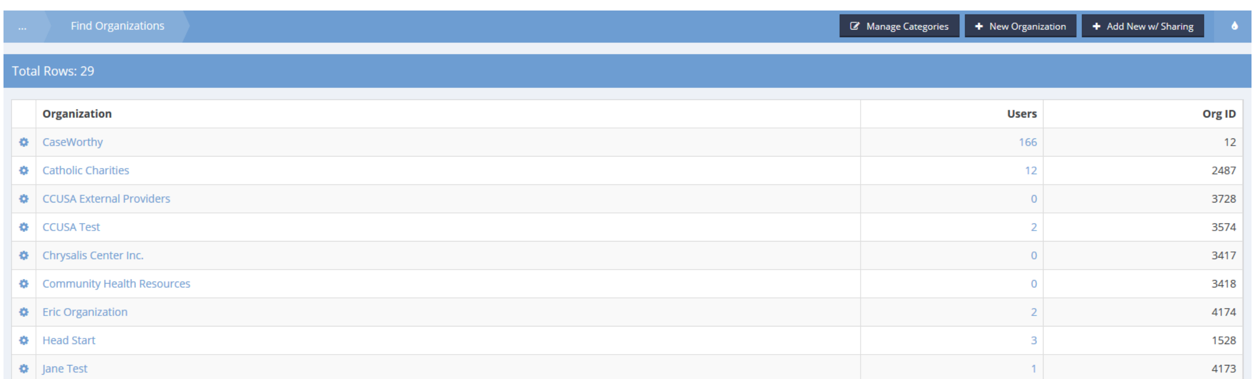
On the desired approval name, click the action gear icon and click Edit. The Approval Process Set Up form displays.



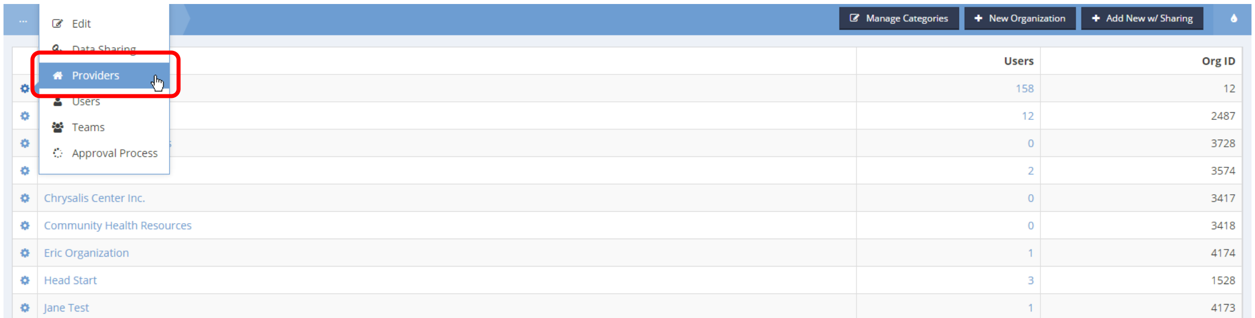
Select a new approval type or process from the drop-down lists. Select a specific provider if desired. Click Save when finished.

Seasonal and Overflow Bed Setup

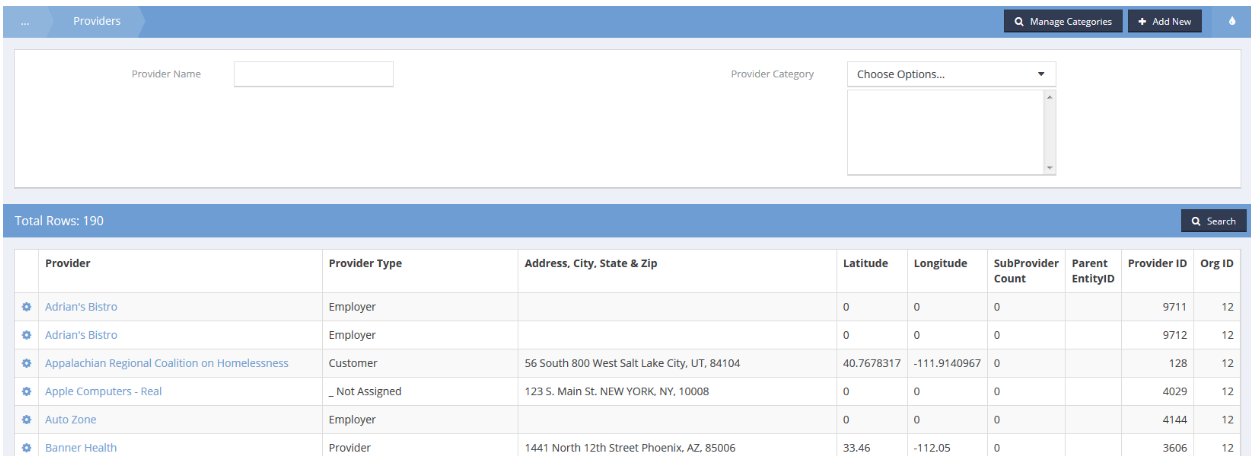
(Administration>Setup>Organizations)



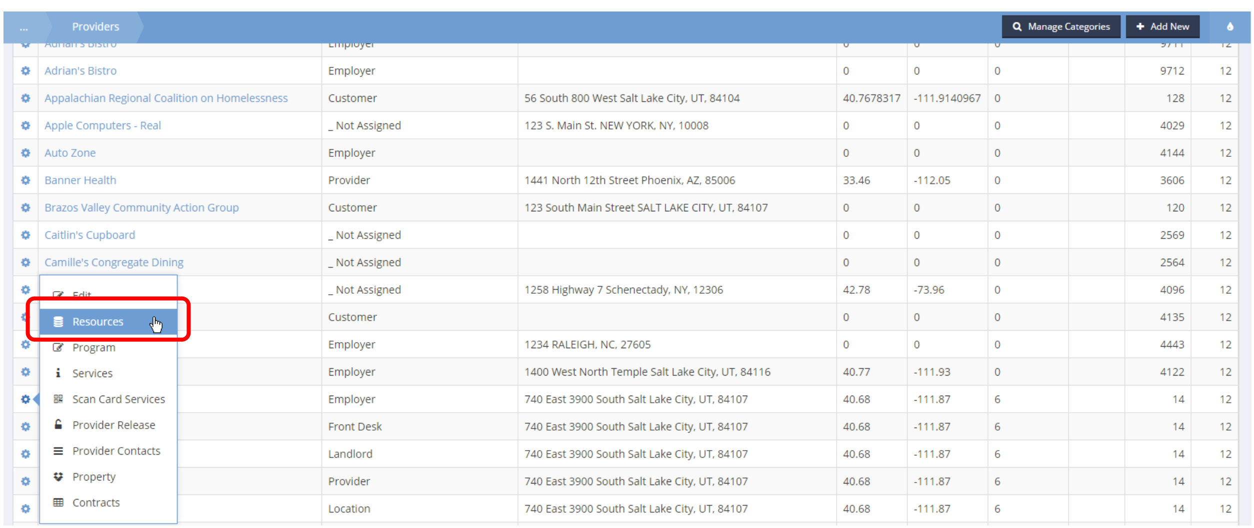
On the Find Organizations form, click the action gear icon associated with the desired organization and select Providers from the pop up menu that appears.



The Providers form displays.



Click the action gear icon associated with the desired provider and select Resources from the pop up menu that appears.



The Resources form displays.

... Resources

Add Resource

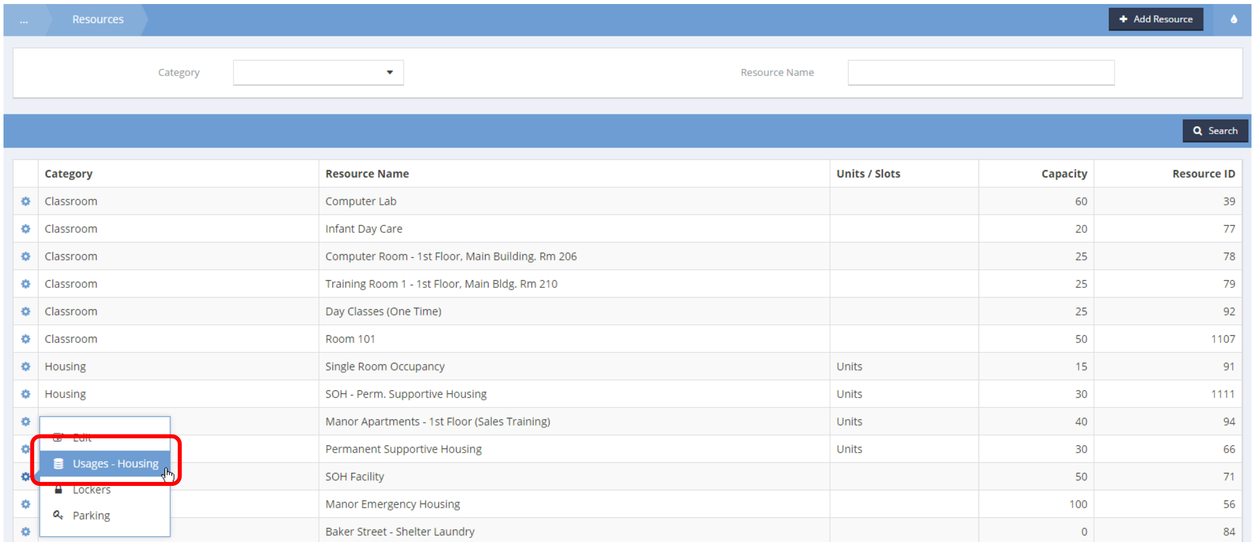
Category

Resource Name

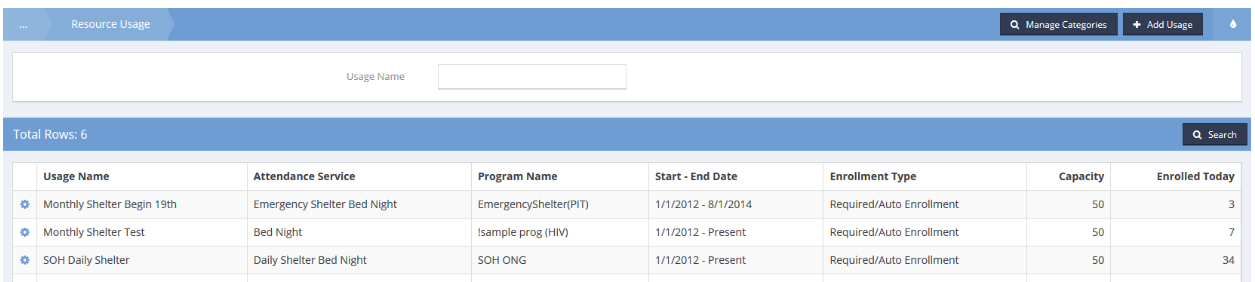
Search

	Category	Resource Name	Units / Slots	Capacity	Resource ID
	Classroom	Computer Lab		60	39
	Classroom	Infant Day Care		20	77
	Classroom	Computer Room - 1st Floor, Main Building, Rm 206		25	78
	Classroom	Training Room 1 - 1st Floor, Main Bldg, Rm 210		25	79
	Classroom	Day Classes (One Time)		25	92
	Classroom	Room 101		50	1107
	Housing	Single Room Occupancy	Units	15	91
	Housing	SOH - Perm. Supportive Housing	Units	30	1111
	Housing	Manor Apartments - 1st Floor (Sales Training)	Units	40	94
	Housing	Permanent Supportive Housing	Units	30	66
	Housing Emergency	SOH Facility		50	71
	Housing Emergency	Manor Emergency Housing		100	56

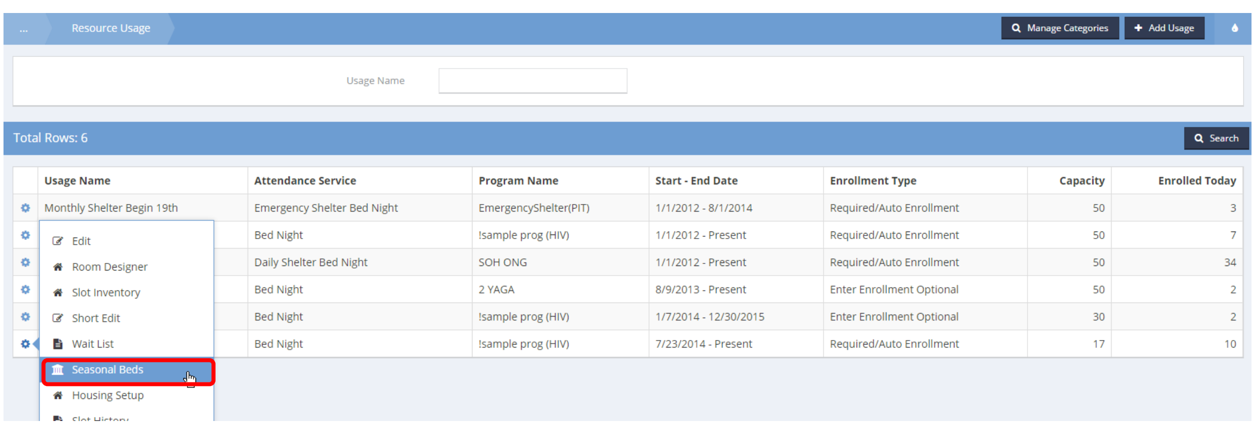
Click the action gear icon associated with the desired resource and select Usages – Housing from the pop up menu that appears.



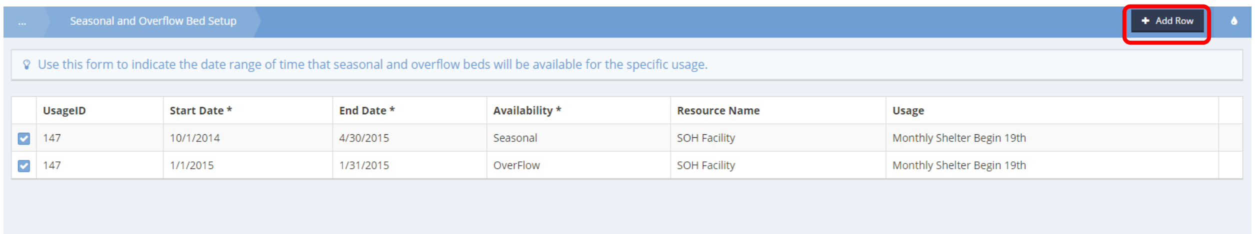
The Resource Usage form displays.



Click the action gear icon associated with the desired resource usage and select Seasonal Beds from the pop up menu that appears.



The Seasonal and Overflow Bed Setup form displays.



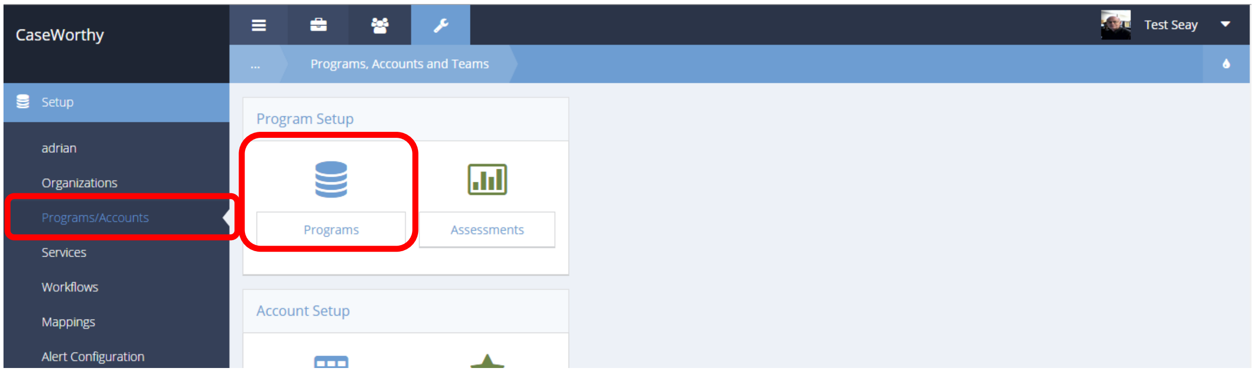
	UsageID	Start Date *	End Date *	Availability *	Resource Name	Usage
☑	147	10/1/2014	4/30/2015	Seasonal	SOH Facility	Monthly Shelter Begin 19th
☑	147	1/1/2015	1/31/2015	OverFlow	SOH Facility	Monthly Shelter Begin 19th

Click the **+ Add Row** button. A new, expanded row displays. Set a start date, end date, and availability. Click **Save** when finished.

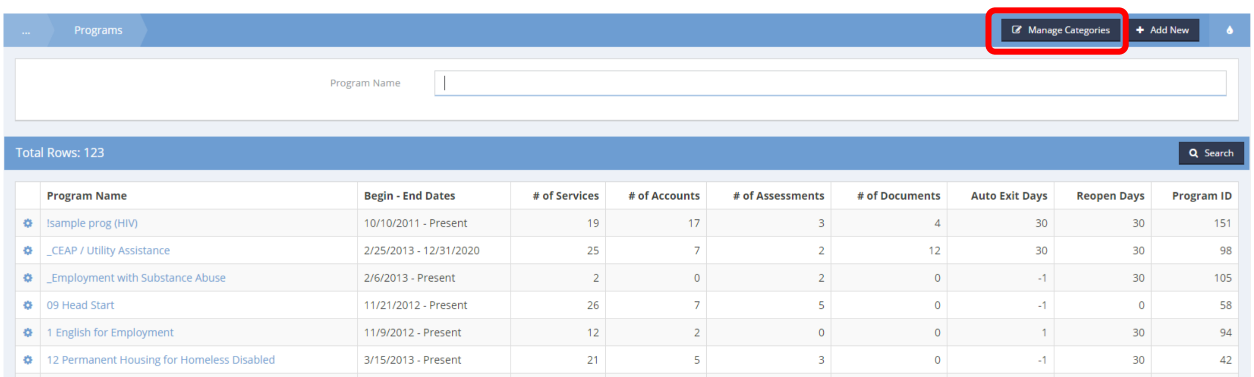
Programs

(Administration >Programs/Accounts>Programs)

Programs are the vehicles by which clients receive services. To add, edit or manage programs, click on "Programs/Accounts" in the Setup menu then select the "Programs" icon on the dashboard.

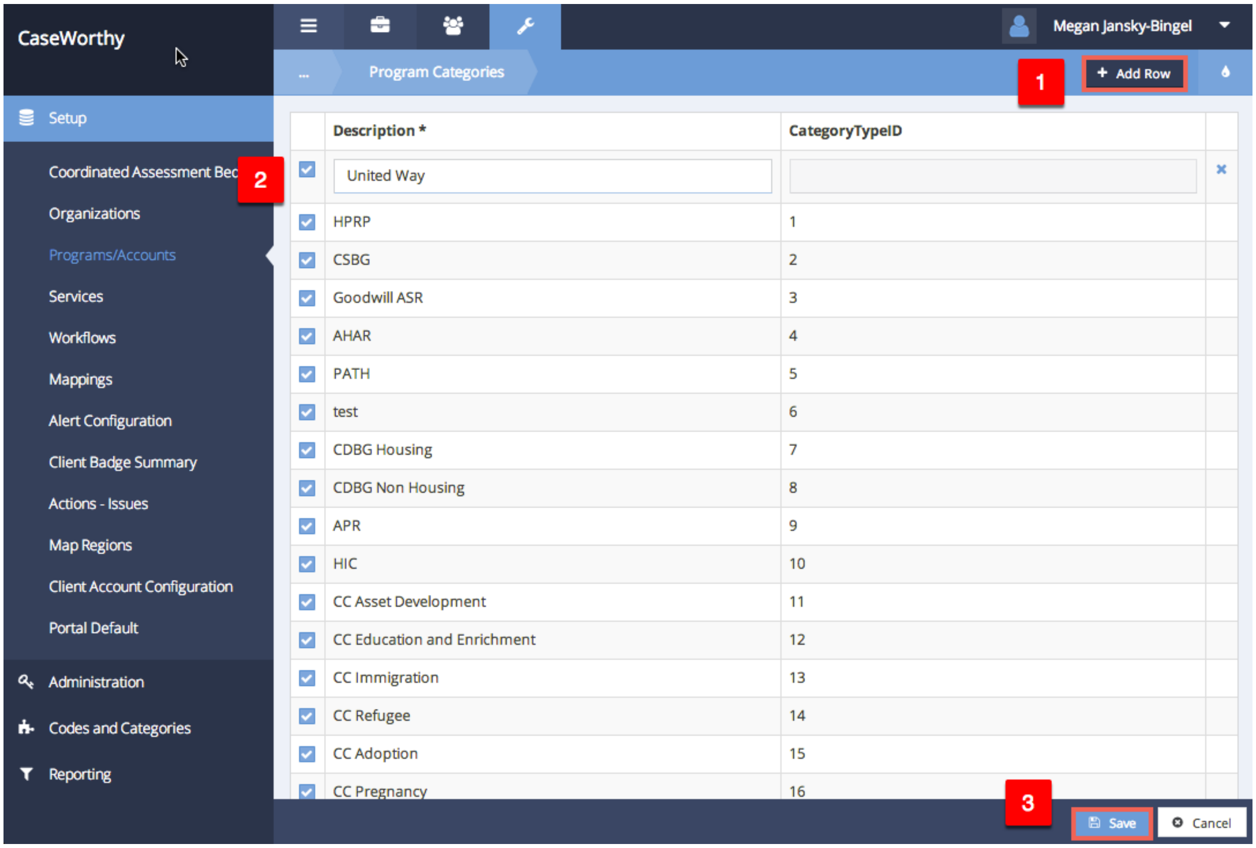


The Programs summary form displays.

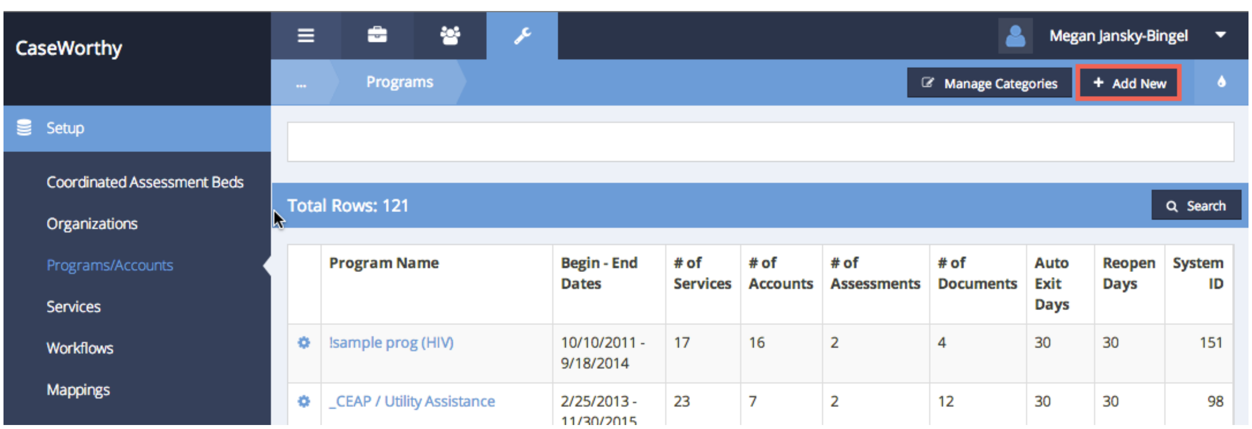


Programs are filtered by categories in various reports and queries in the system. Every program *must be* associated with a program category. To add or edit program categories, click on the Manage Categories button on the top right.

The Program Categories form appears. Click the + Add Row button to add rows to the form. A new row expands. Enter any desired category descriptions.

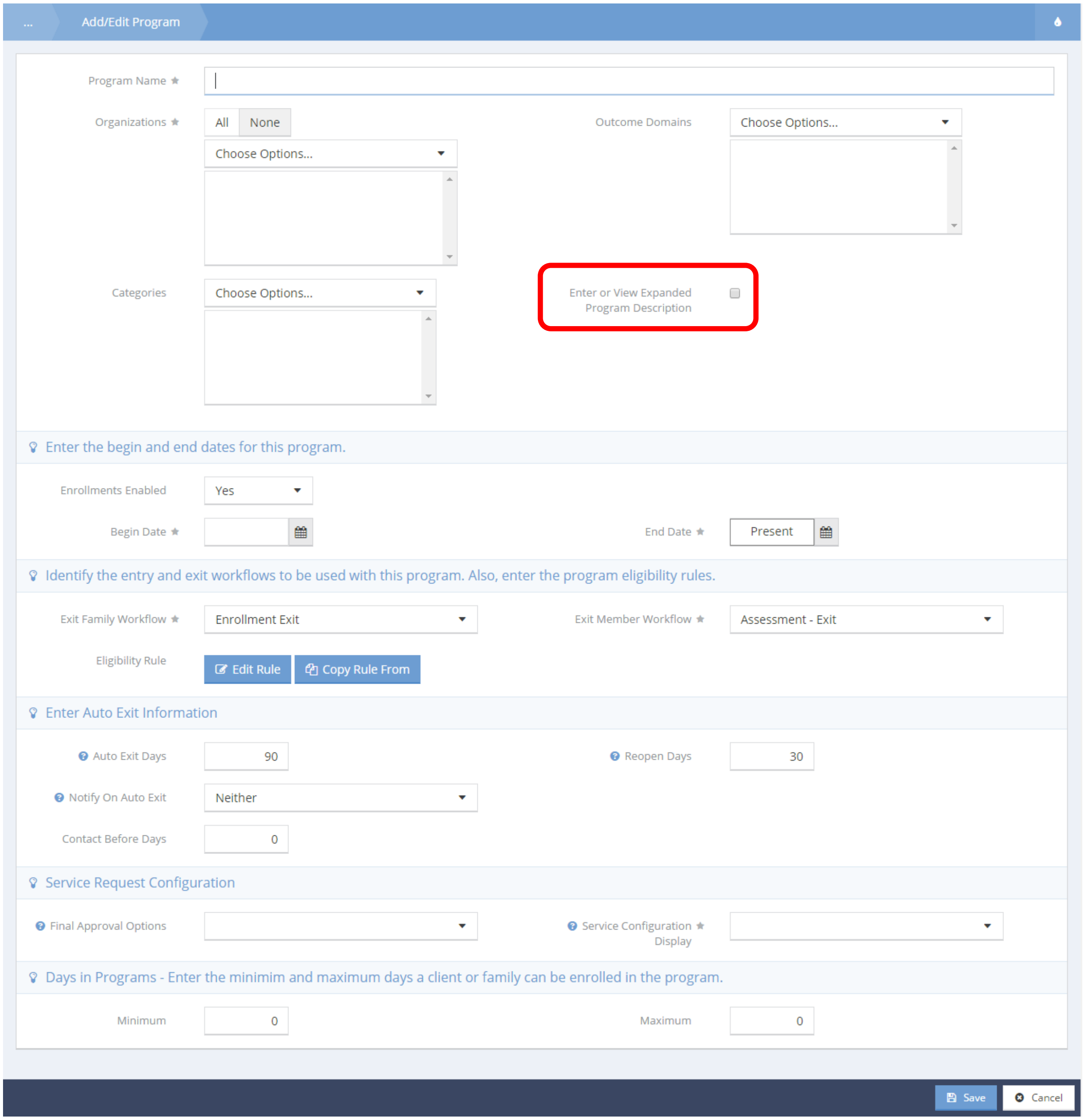


When all desired categories have been entered, click the Save button on the bottom right side of the form. The Program summary form re-appears.



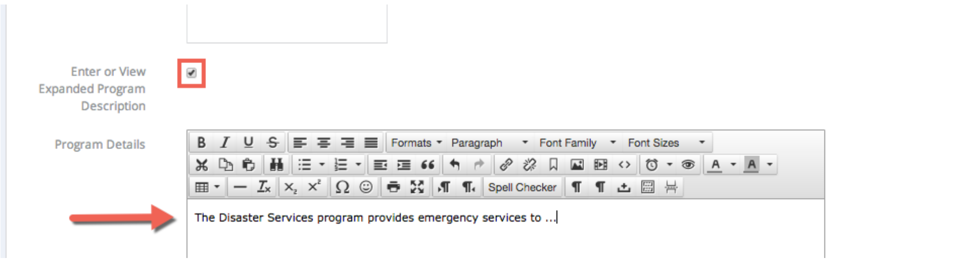
To add a new program, click the + Add New button on the top right.

The Add/Edit Program form displays.

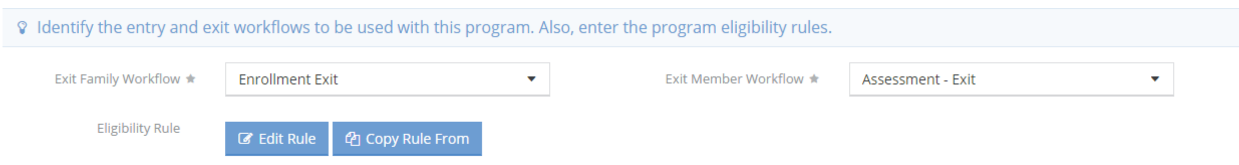


Enter all relevant and required information.

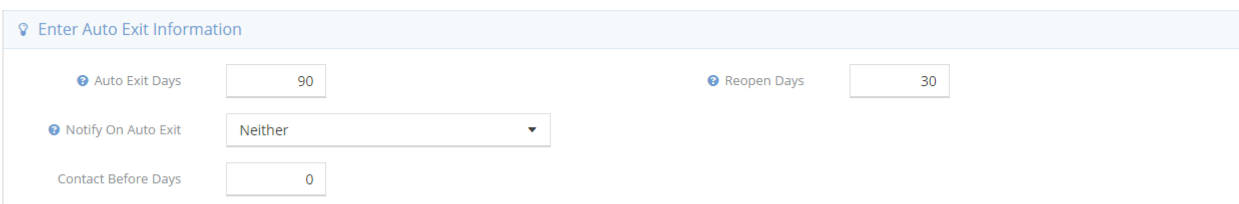
To enter a program description, which can be displayed on the Client Eligibility Determination form, click the Expanded Program Description check box and type text into the Program Details field.



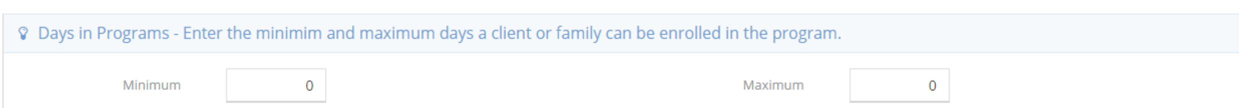
Family and Member workflows are defaulted in and only need to be set if opting for a custom exit workflow.



Auto Exit Days: If the client does not receive any services within the number of days set, the client is automatically exited from the program. To disable automated program exit, enter -1.



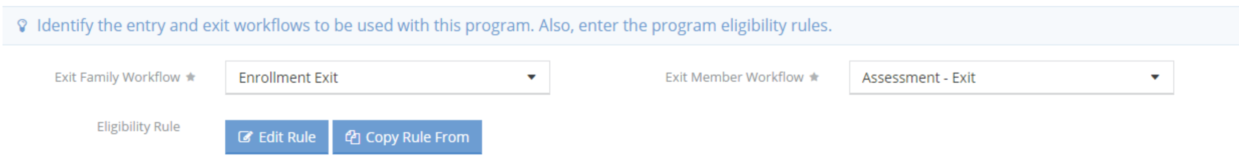
Reopen Days: If a client has exited the program and returns within the time set in this field, users are instructed to re-open the recent enrollment rather than create a new record. To disable the reopen function, enter -1.



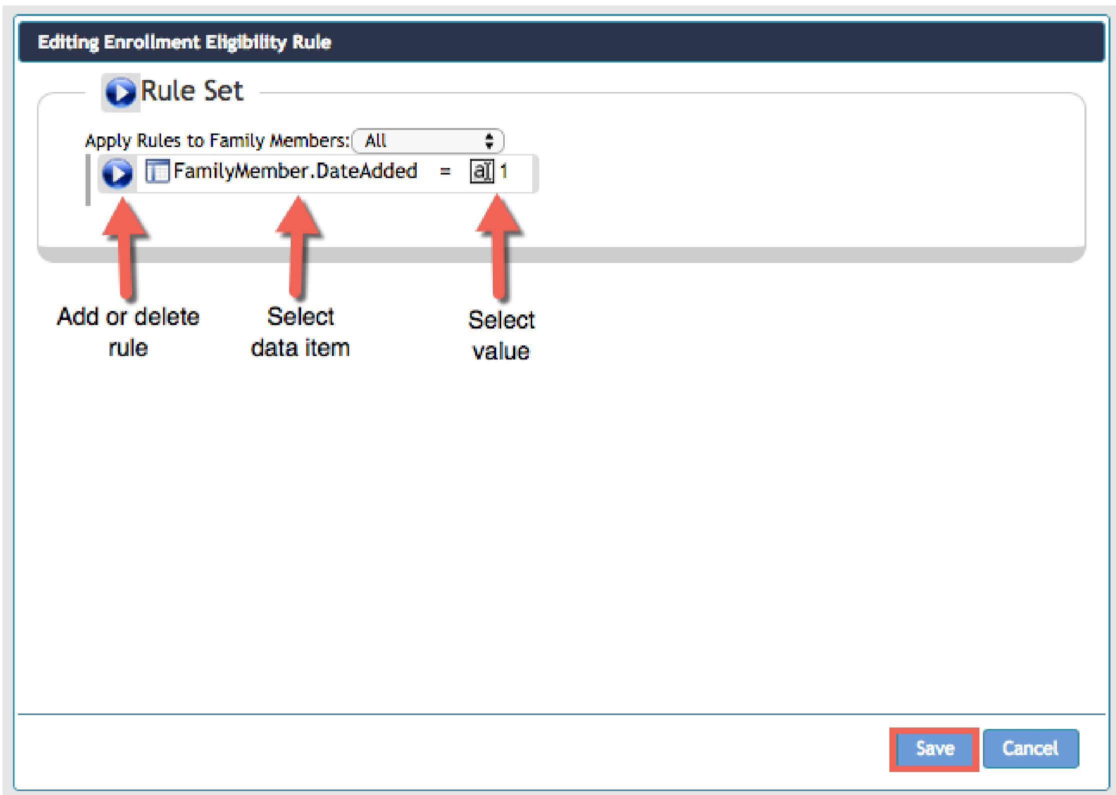
Minimum/Maximum: Enter a number of days in these fields if there is a minimum-maximum time range a client is allowed to be enrolled in the program.
Click the Save button on the bottom right of the form when all desired data has been entered.

Eligibility Rule

To add Eligibility Criteria, click the Edit Rule button on the Program setup form.



The Editing Enrollment Eligibility Rule pop up form displays in a new window.

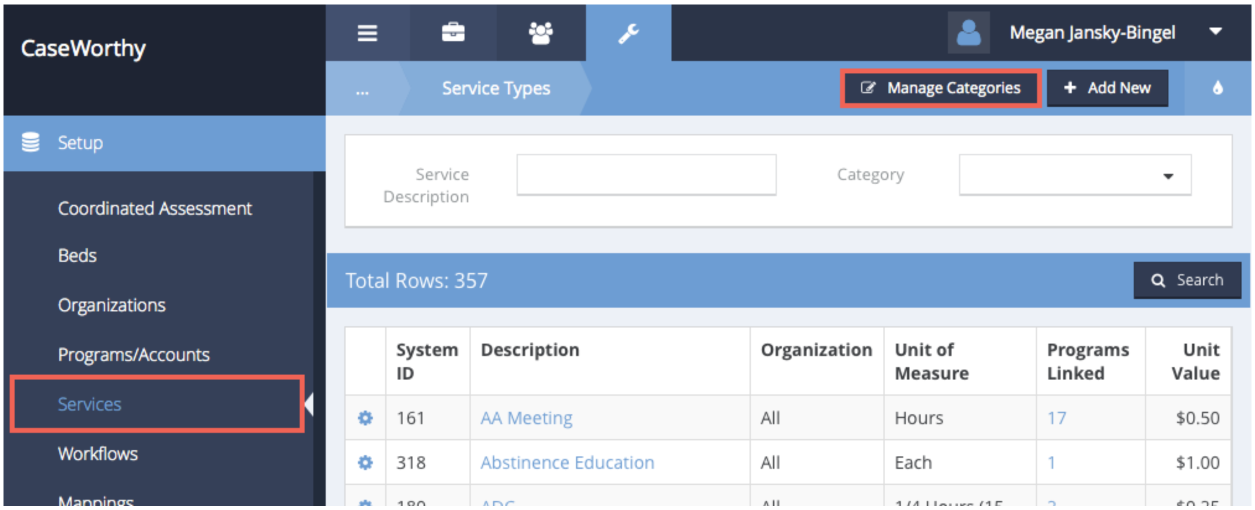


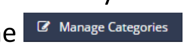
Enter rule sets as necessary. Define the family members the rule applies to and add criteria by defining data points and allowable conditions.

Services Setup

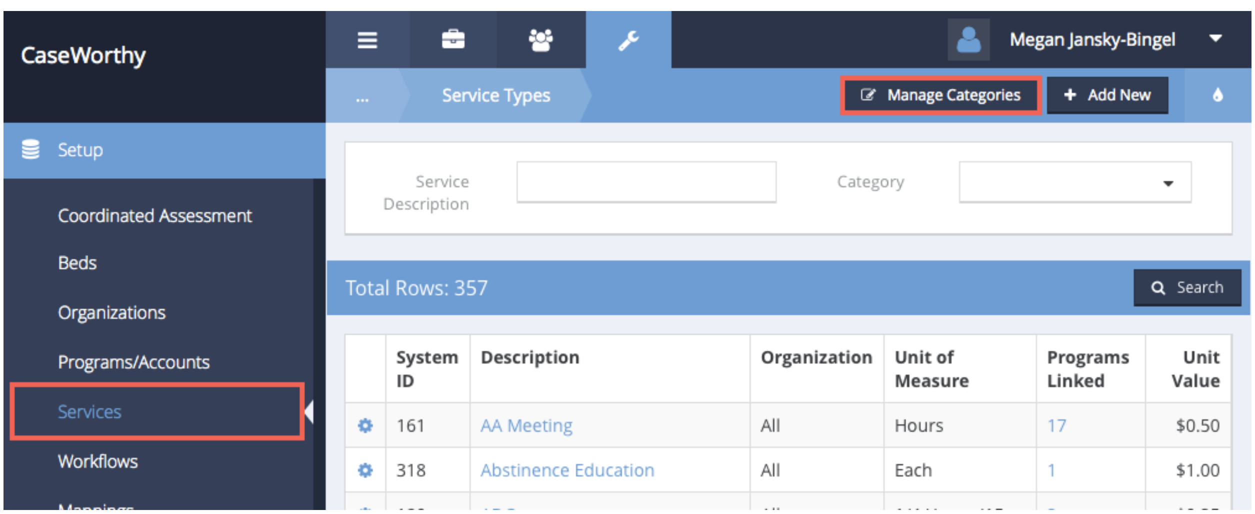
(Administration>Setup>Services)

The services area houses all services. Once a service has been created, it can be mapped to one or more programs. To create, manage or edit services and service categories, select the "Services" link on the Setup menu. The Service Types form displays.

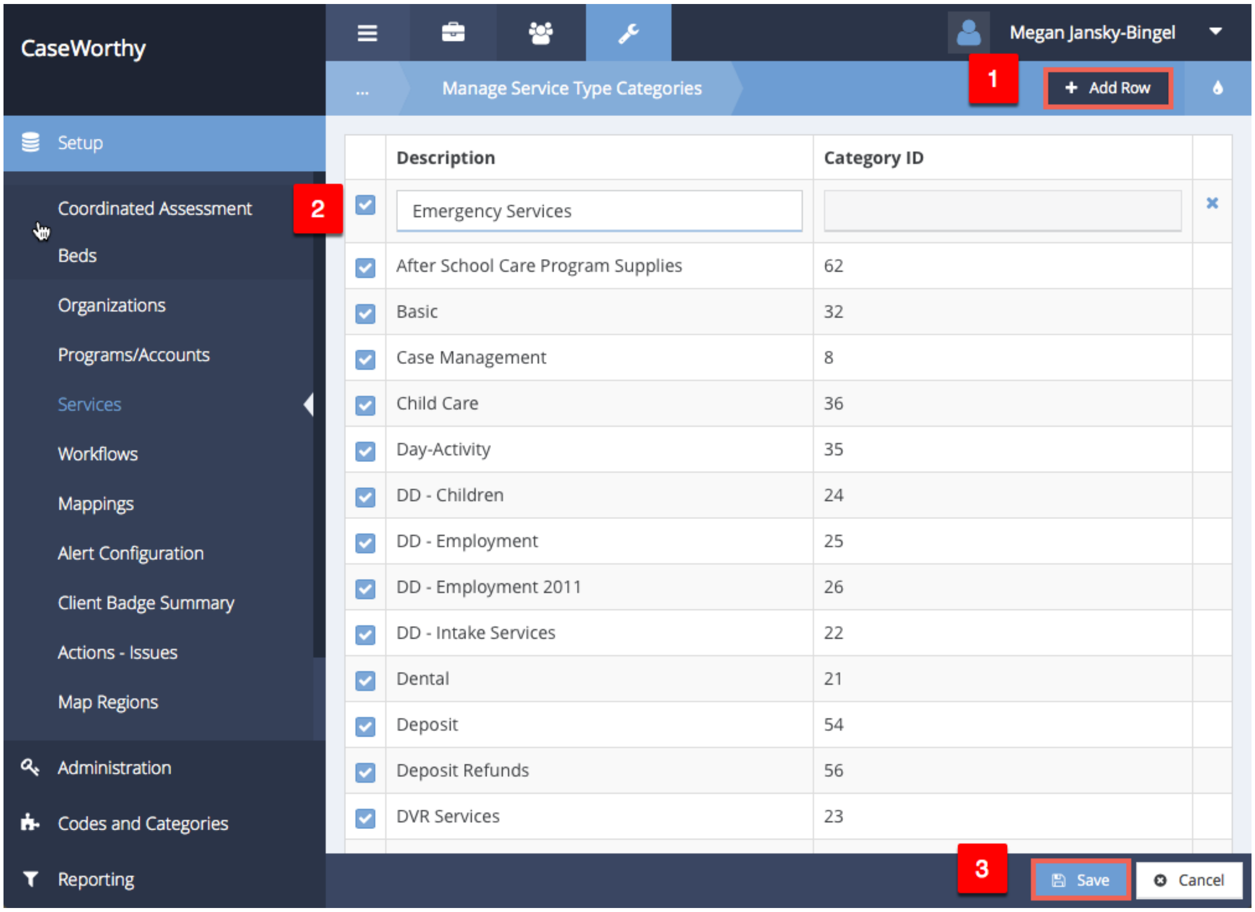


Services are often filtered by category in various reports and queries within the system. Every service *must be* associated with at least one category. To add a service category, click on the 

button on the top right of the form.

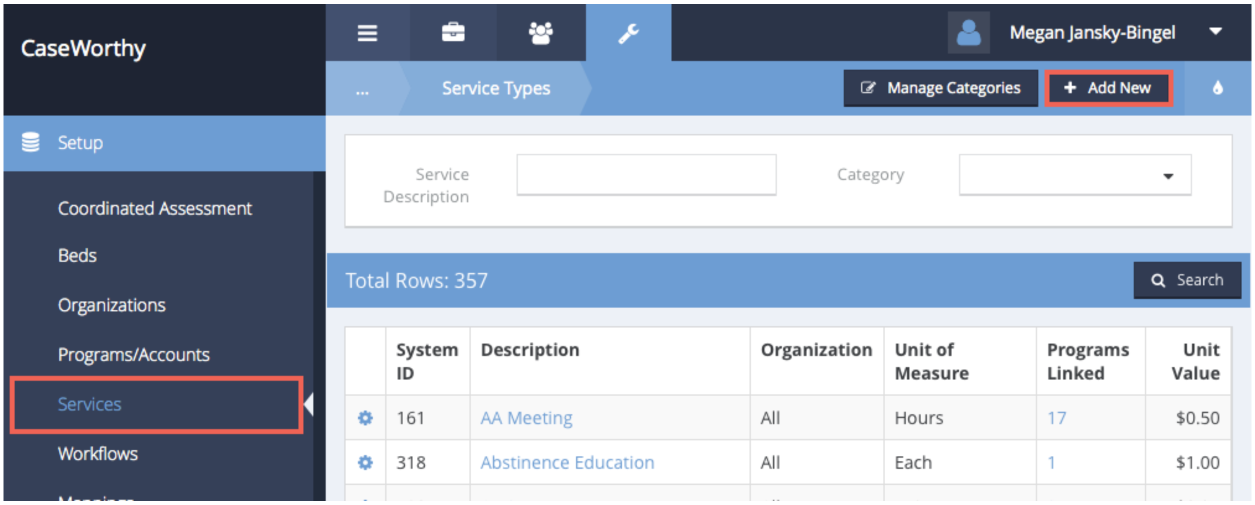


The Manage Service Type Categories form appears.

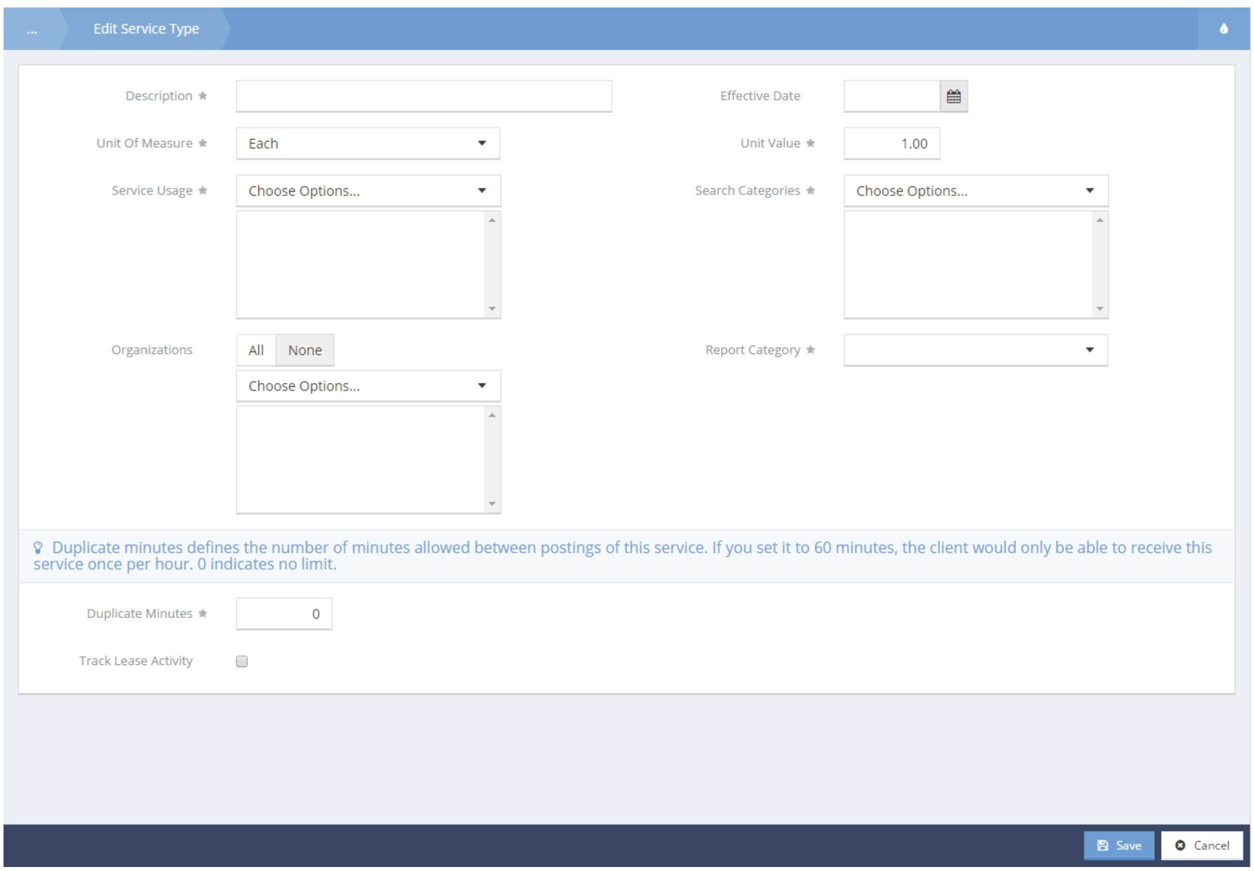


Click the **+ Add Row** button to add rows to the form. Enter any desired category descriptions. When all desired categories have been entered, click the **Save** button on the bottom right side of the form. The Services summary form displays.

To create a new service, click the + Add New button on the top right.

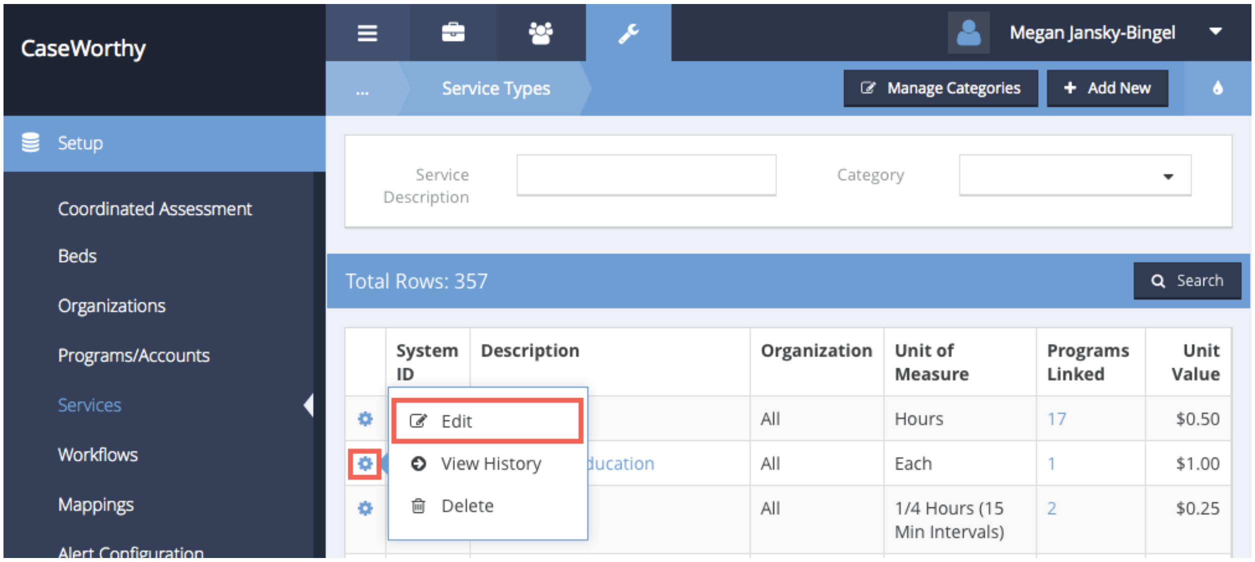


The Add/Edit Service Type form displays.

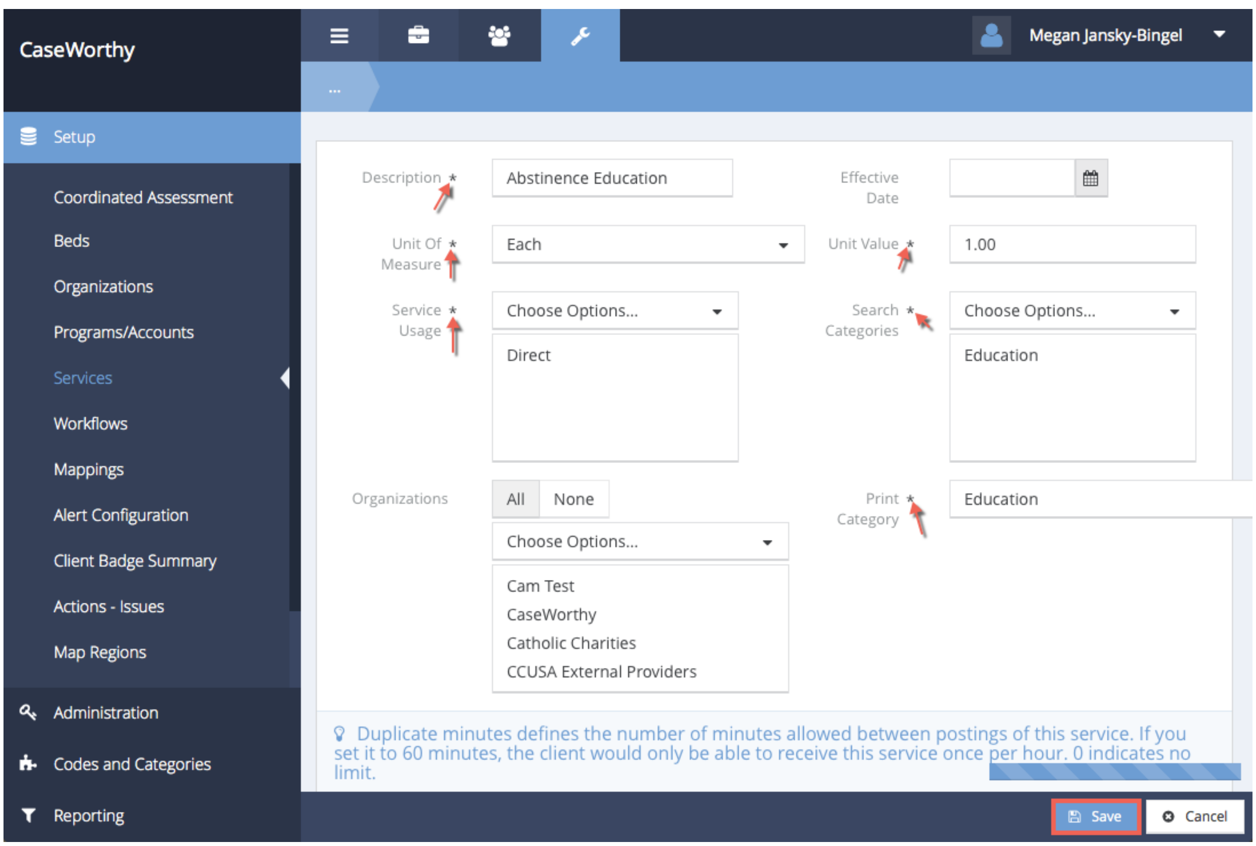


Enter all relevant and required information. The Print Category identifies the default service category for reporting to assure unduplicated service counts. If the service cannot be repeated for a certain amount of time, enter the amount in the "Duplicate Minutes" field. Click the Save button on the bottom right of the form when all desired data has been entered.

To edit a service type, click the gear associated with the desired service on the Service Types form and select Edit from the popup menu that appears.



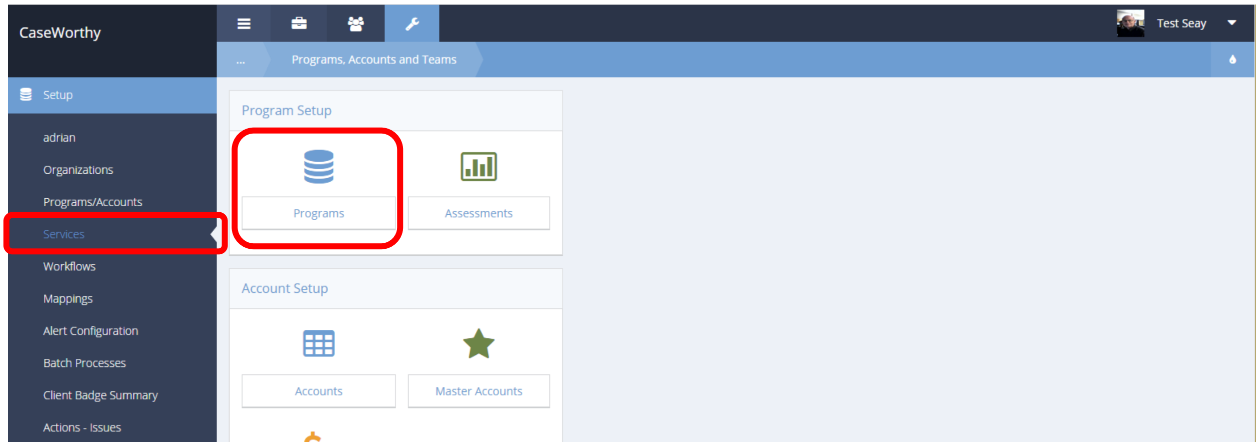
Fill out all required areas marked with a star * icon in the Add/Edit Service Type form and click Save.



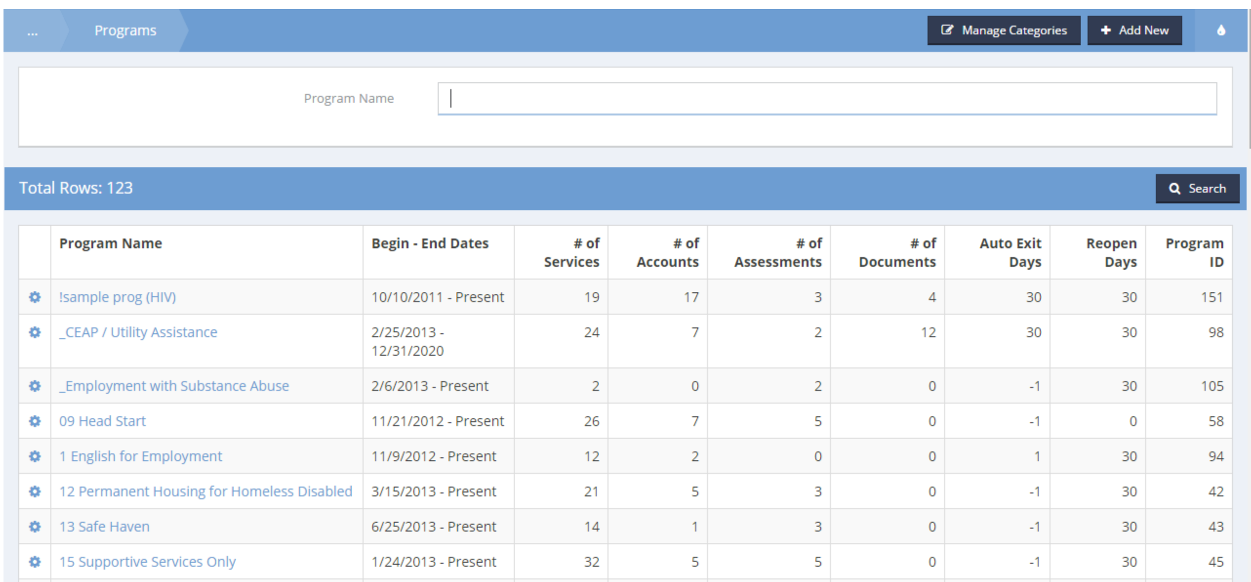
Linking Services to Programs

(Administration>Setup>Programs/Accounts>Programs>Program Services)

For efficiency and to reduce data entry errors, only services that have been linked to a program can be assigned to a client enrolled in the program. To link services to programs, select the "Programs/Accounts" link on the Setup menu then click on the "Programs" icon on the dashboard.



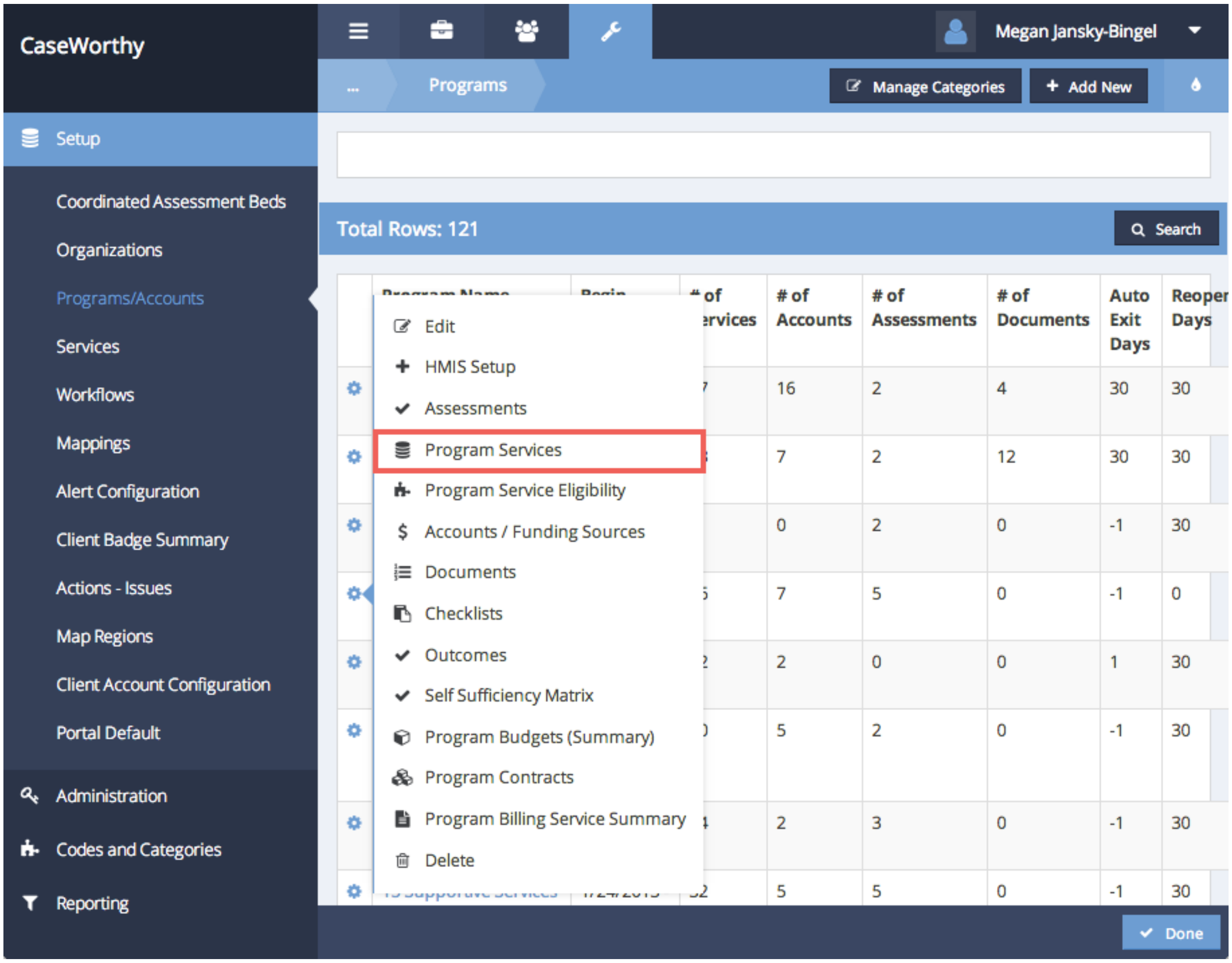
The Programs summary form displays.



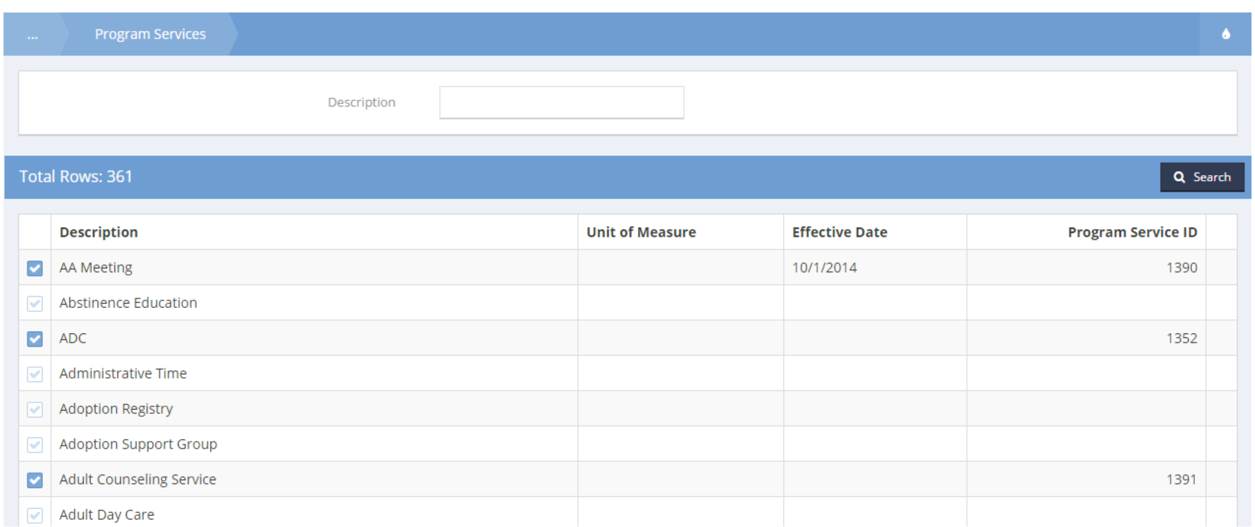
Program Name	Begin - End Dates	# of Services	# of Accounts	# of Assessments	# of Documents	Auto Exit Days	Reopen Days	Program ID
!sample prog (HIV)	10/10/2011 - Present	19	17	3	4	30	30	151
_CEAP / Utility Assistance	2/25/2013 - 12/31/2020	24	7	2	12	30	30	98
_Employment with Substance Abuse	2/6/2013 - Present	2	0	2	0	-1	30	105
09 Head Start	11/21/2012 - Present	26	7	5	0	-1	0	58
1 English for Employment	11/9/2012 - Present	12	2	0	0	1	30	94
12 Permanent Housing for Homeless Disabled	3/15/2013 - Present	21	5	3	0	-1	30	42
13 Safe Haven	6/25/2013 - Present	14	1	3	0	-1	30	43
15 Supportive Services Only	1/24/2013 - Present	32	5	5	0	-1	30	45

Navigate to the desired program and click on the action gear.

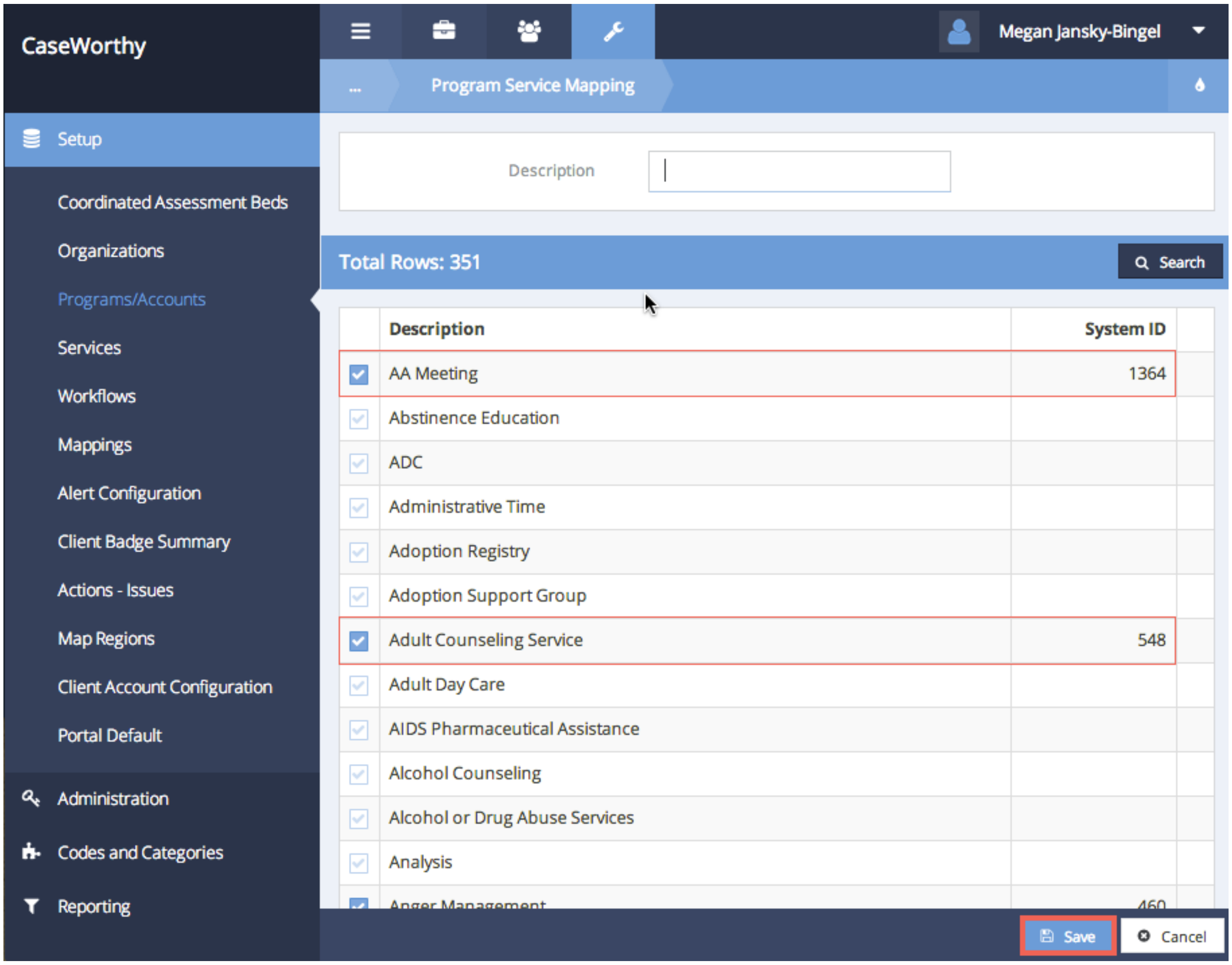
From the drop-down menu, select “Program Services”.



The Program Services form displays a full list of services.



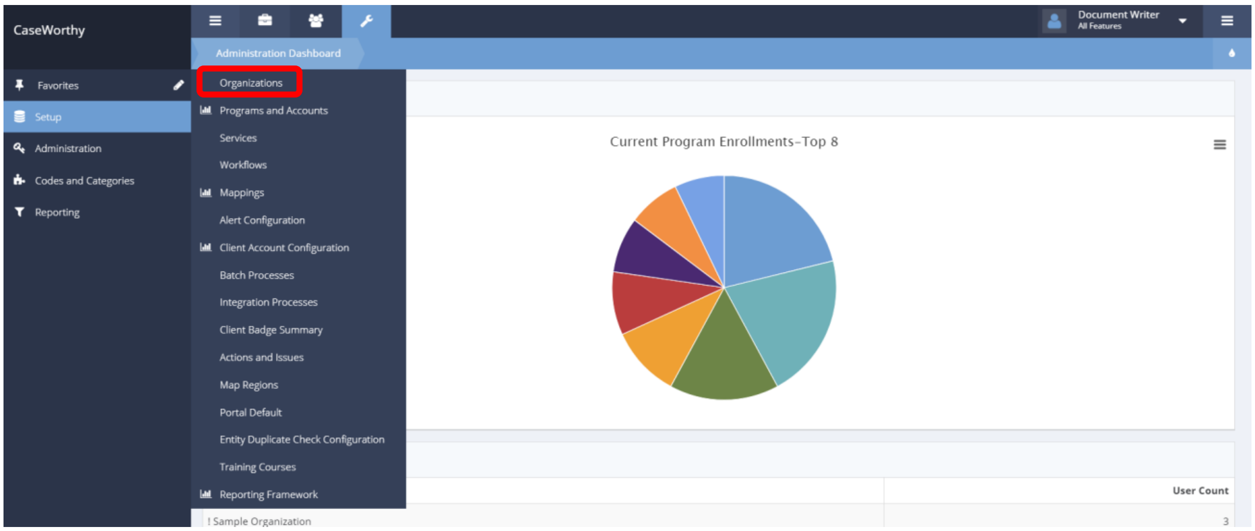
Scroll through the list to find the desired services. Click on the checkbox next to the service description to link it to the program. When linked, the icon changes to a darkened checkbox. Click the Save button on the bottom right of the form when all desired services have been selected.



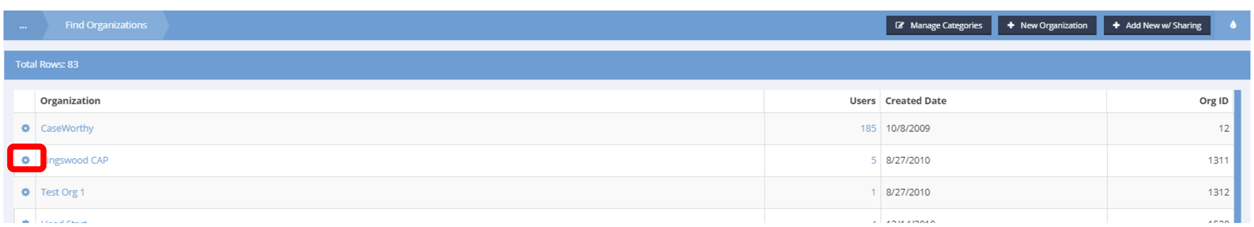
Add Entity Service Plan (Input)

Objective: Add a service plan for entities other than clients.

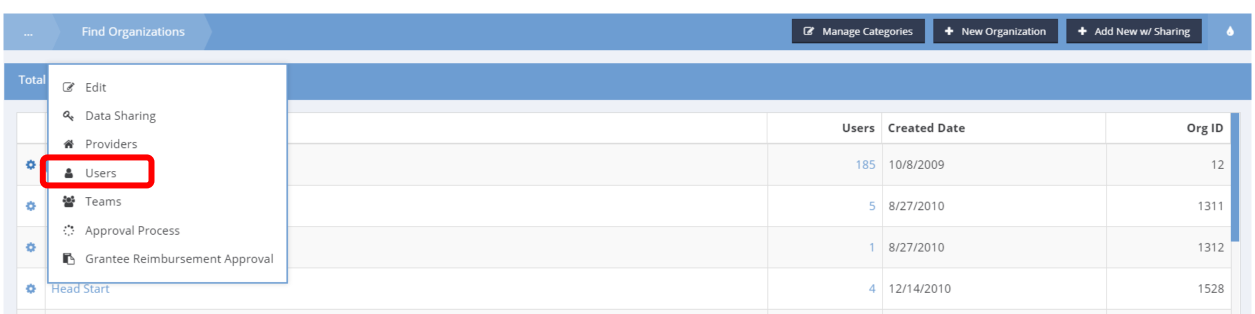
Navigation: Administration Dashboard>Setup>Organizations>Users>Service Plan>...Add New



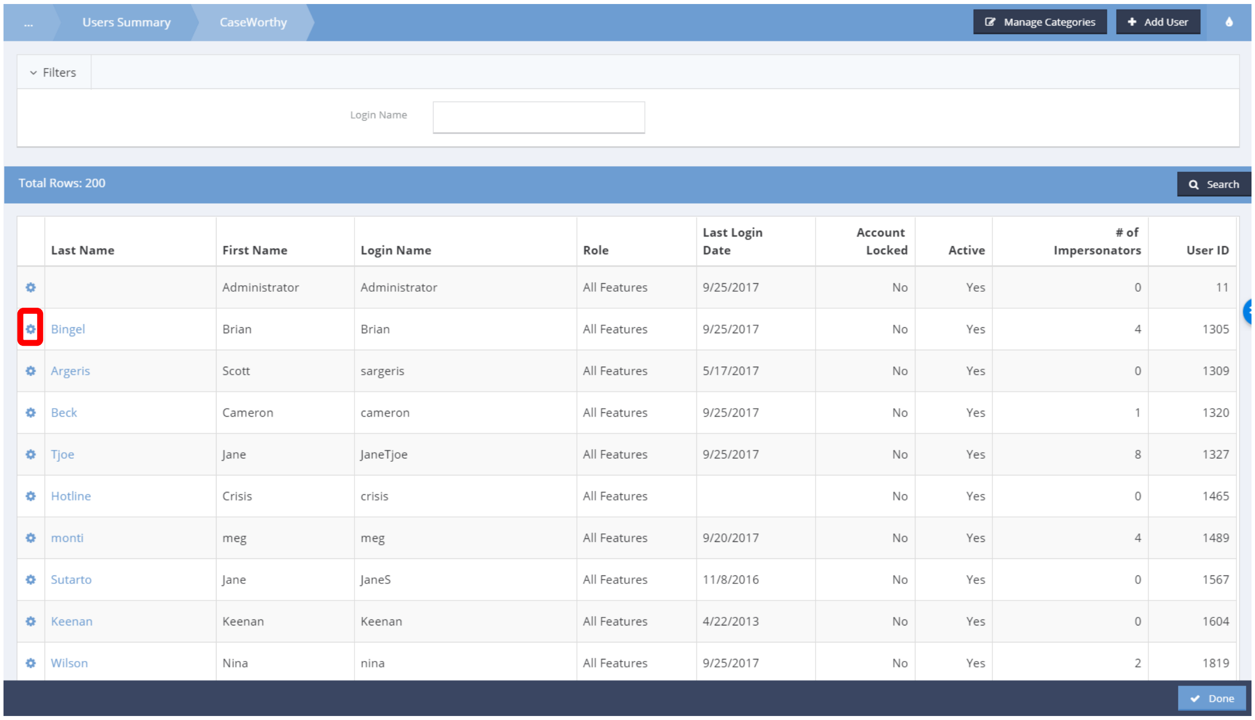
Under the Administration tab click Setup. Select Organizations from the pop-up menu that appears. The Find Organizations form appears.



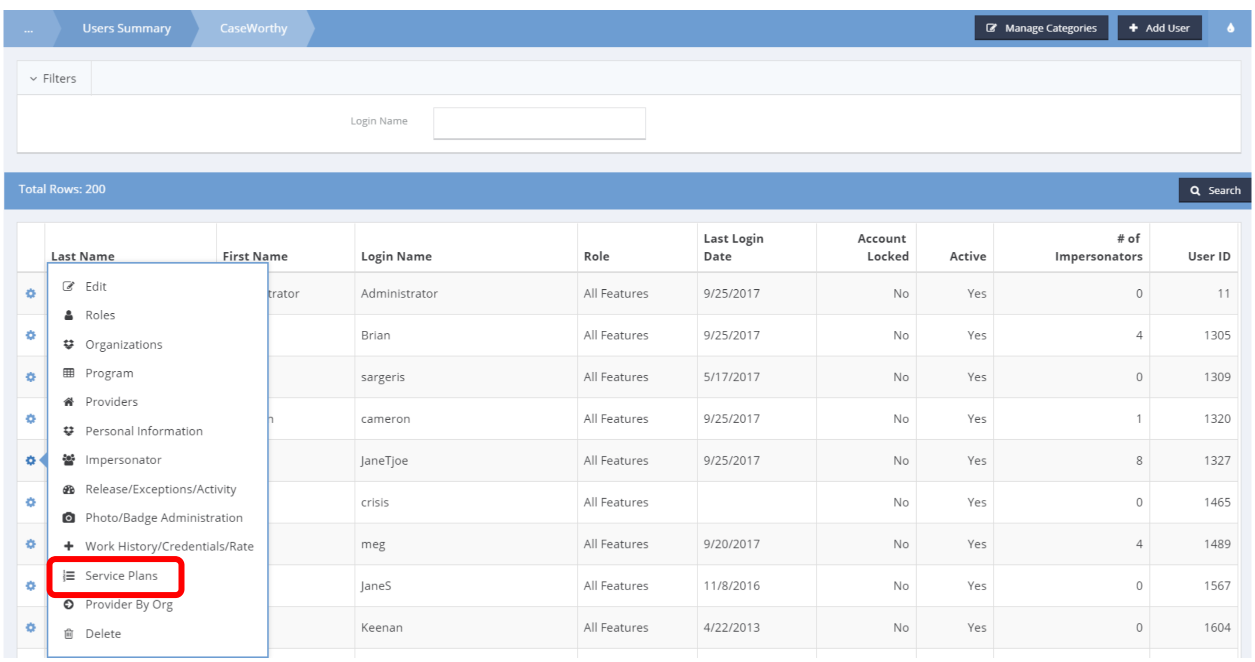
Click the action gear icon to the left of the desired organization. Select Users from the pop-up menu.



The Users Summary page appears.

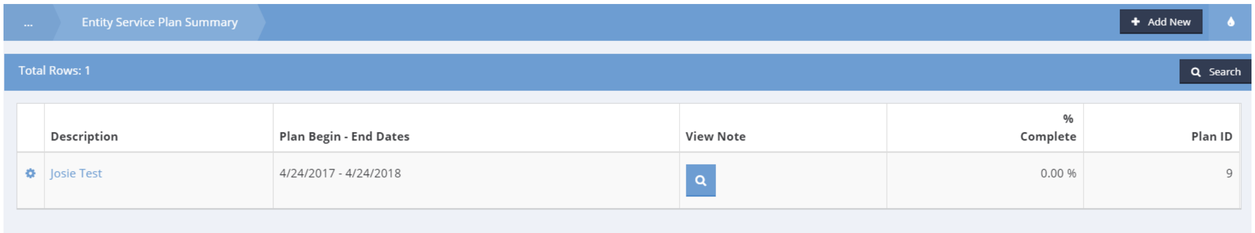


Click the action gear icon to the left of the desired user. A pop-up menu appears.

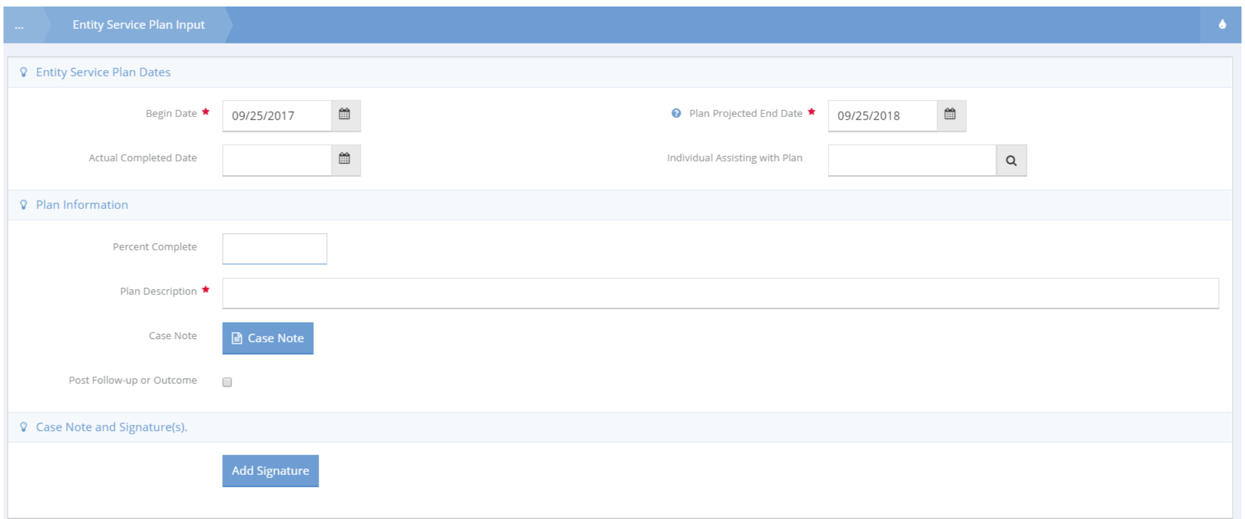


Select Service Plans.

The Entity Service Plan Summary form appears.



To add a new Service Plan, click the Add New button. The Entity Service Plan Input form appears.



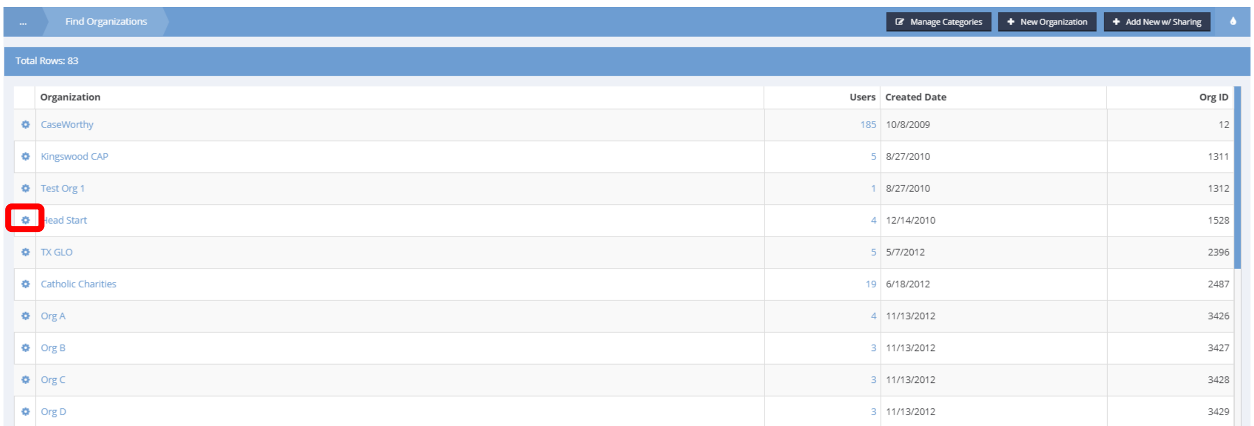
Click the date icons to add in any Entity Service Plan Dates. Click the checkbox next to Post Follow-up or Outcome. The Add Follow Up or Outcome section appears. To add a follow up or outcome click the checkbox. To add a signature, click the Add Signature button. Click the Save button to save the form and return to the Entity Service Plan Summary form.

Entity Service Plan Goal and Step Add

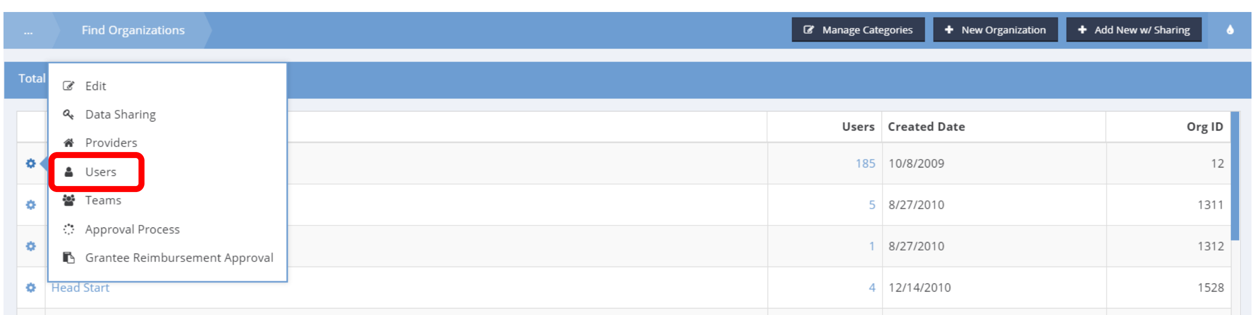
Objective: Adding a goal and steps to a service plan.

Navigation: Administration Dashboard>Setup>Organizations>Users>Service Plan>...Add New

From the Find Organizations form, click the action gear icon to the left of the desired organization.

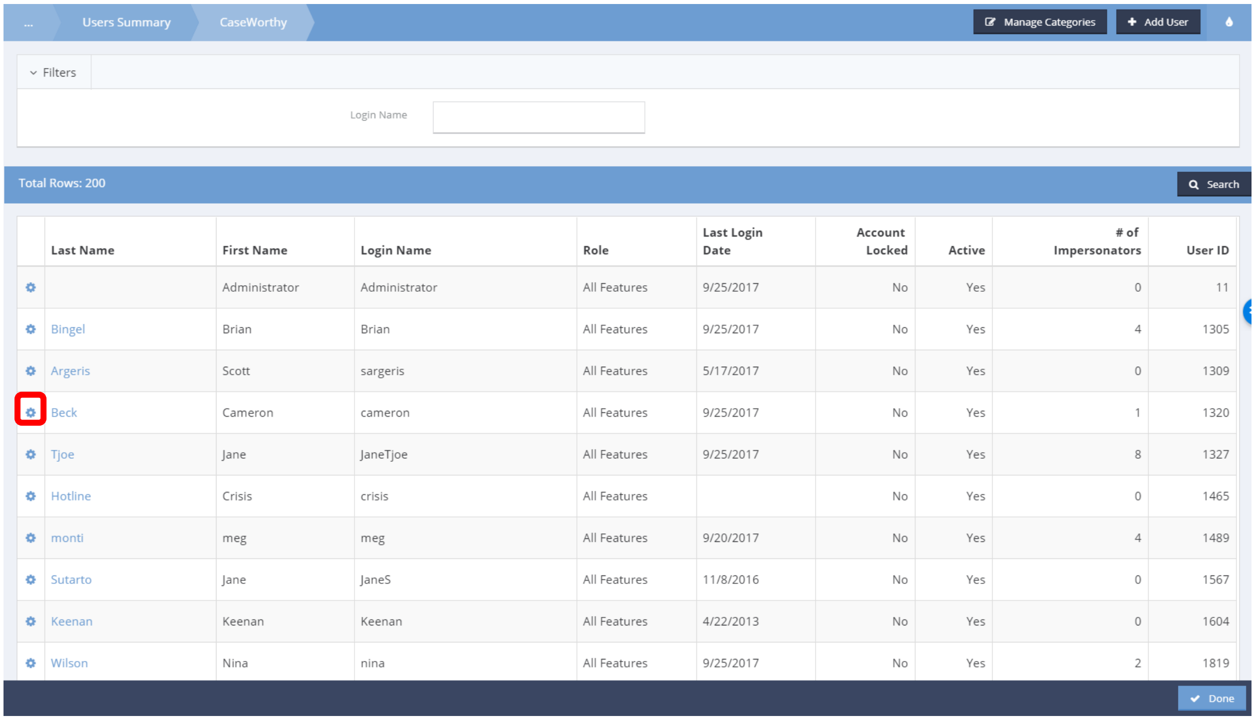


A pop up menu appears.

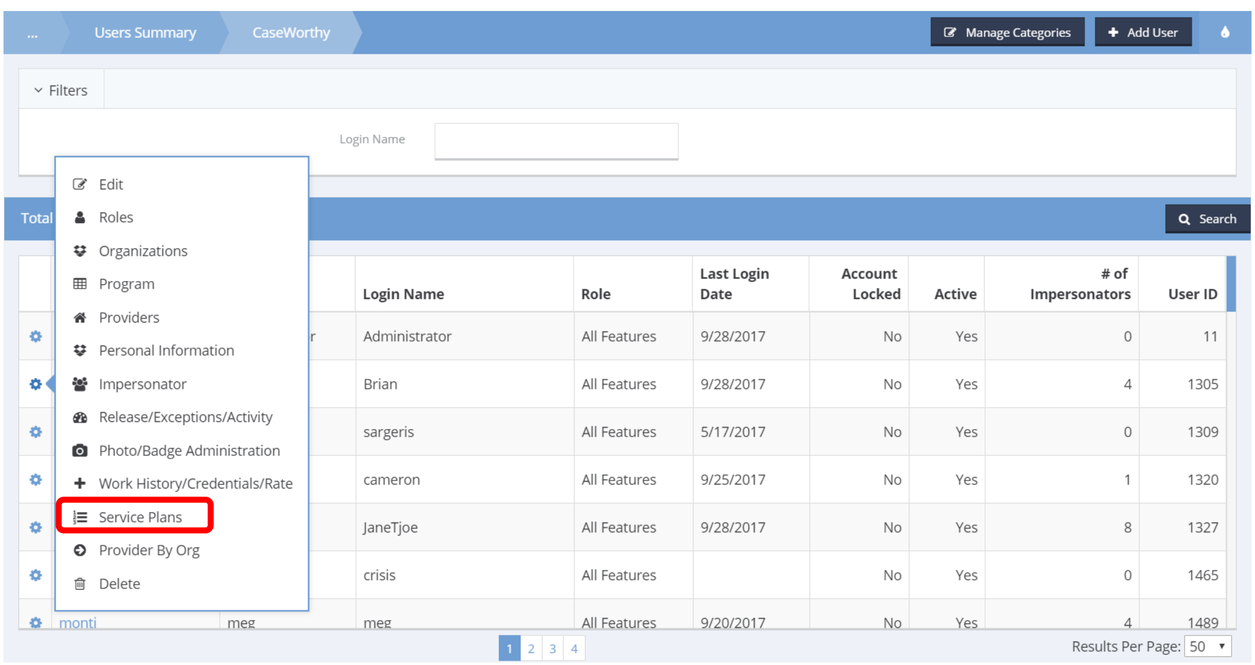


Select Users from the pop-up menu.

The Users Summary page appears.

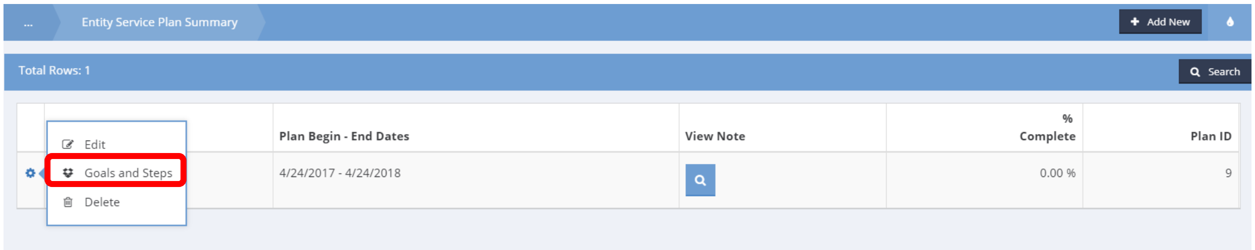


Click the action gear icon to the left of the desired user. A pop-up menu appears.

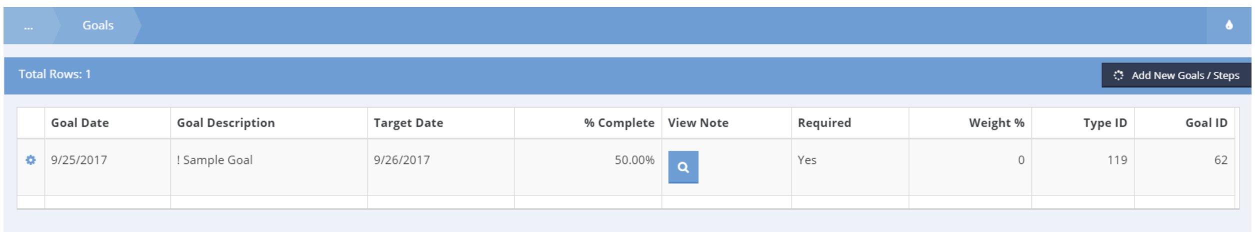


Select Service Plans from the pop-up menu.

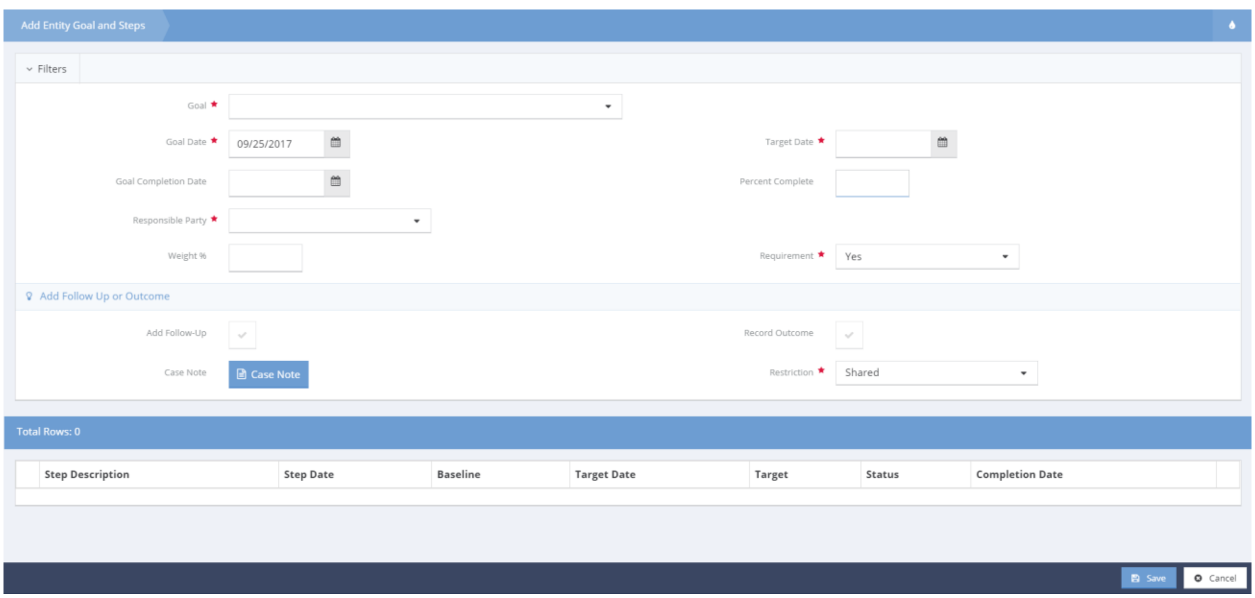
The Entity Service Plan Summary form appears.



To view a summary of goals and steps associated with a service plan, click the icon next to a service plan. Select Goals and Steps from the pop-up menu that appears. The Goals form appears displaying a summary of all goals.

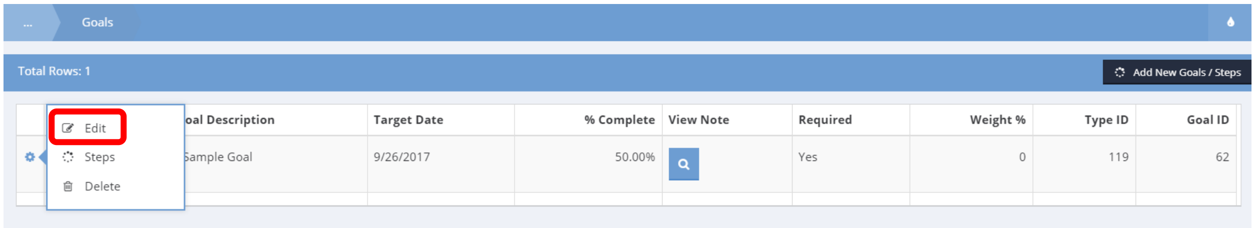


To add a new goal or step, click the Add New Goals / Steps button. The Add Entity Goal and Steps form appears in a new window.

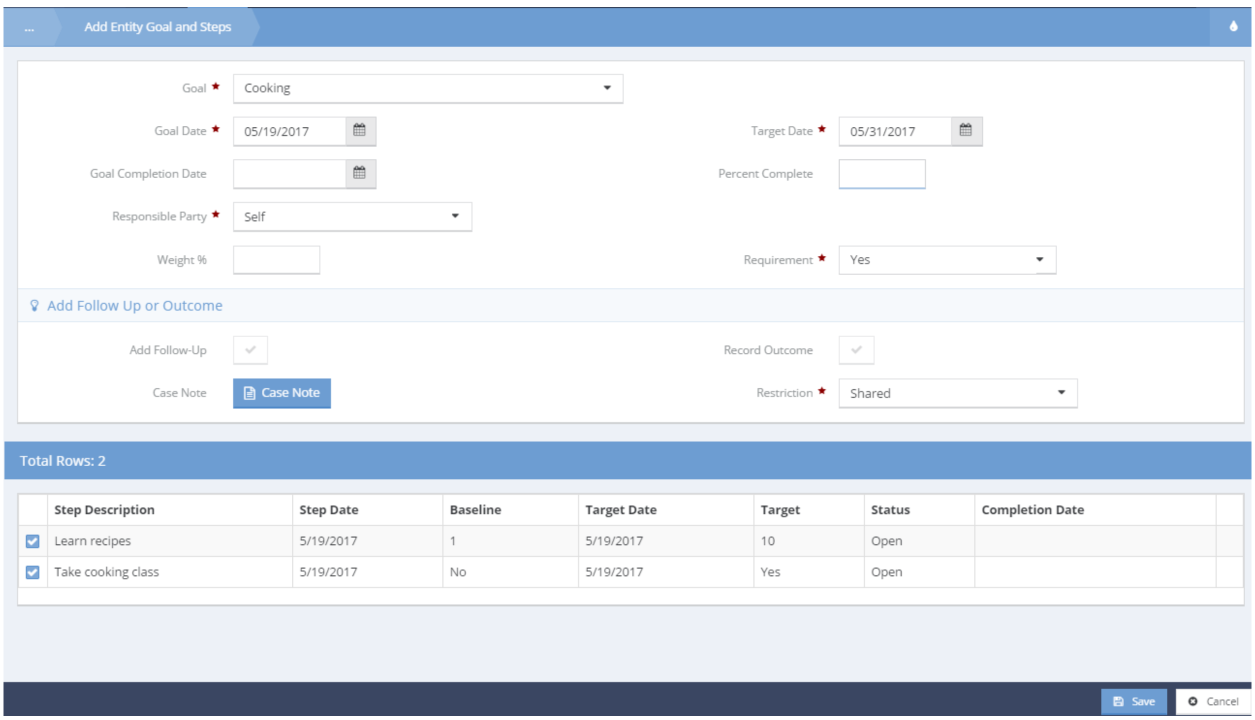


Select a goal from the drop-down menu next to Goal. Select any applicable dates by clicking the date icons. Fill in the rest of the information. To schedule a follow up or record an outcome, click the icon next to Add Follow-Up or Record Outcome. To add a case note, click the

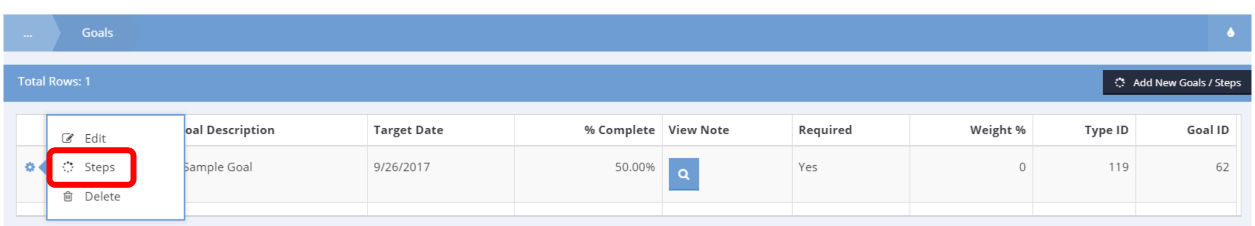
Case Note button. To dictate form visibility, select an option from the drop-down menu next to Restriction. Click the Save button to save the form. Click Cancel to return to the Goals form.



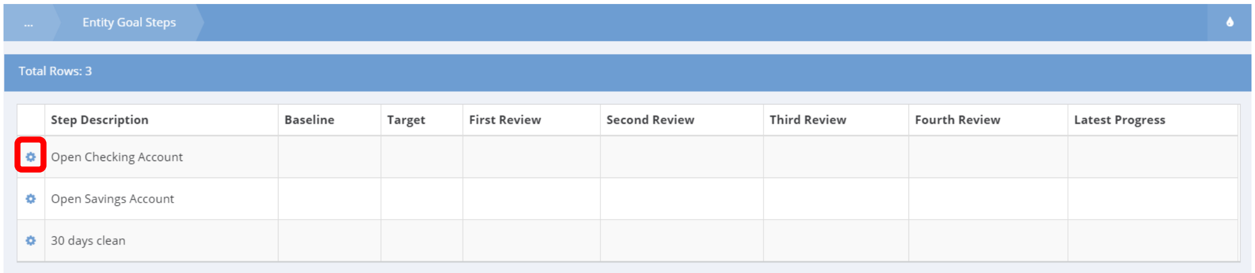
To edit a goal or steps click the icon next to any goal. Select Edit from the pop-up menu that appears. The Add Entity Goal and Steps form appears.



Make any necessary changes to the information and click either the Save or Cancel button to return to the Goals form.

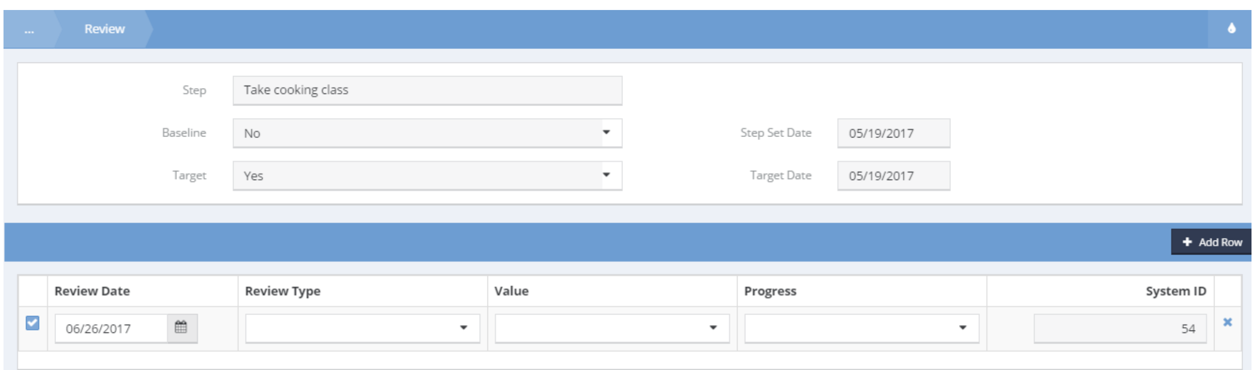


To enter a review of each step for a goal associated with a service plan click the icon. Select Steps from the pop-up menu that appears. The Entity Goal Steps form appears.



Click the icon to view a pop-up menu.

Select Review from the pop-up menu. The Review form appears.



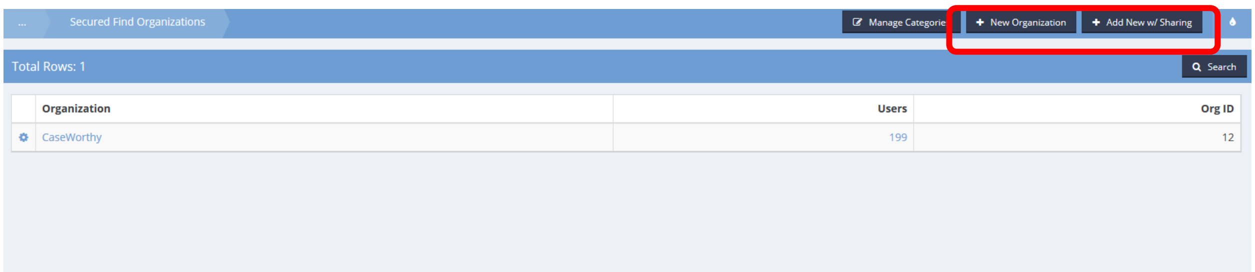
Fill in any appropriate information related to the Step in the top half of the form. In the bottom half of the form, enter information related to each review date. To add a new review date, click the **+ Add Row** button. Save the form by clicking the **Save** button. Click the **Cancel** button to return to the Entity Goal Steps form.

Secured Organizations

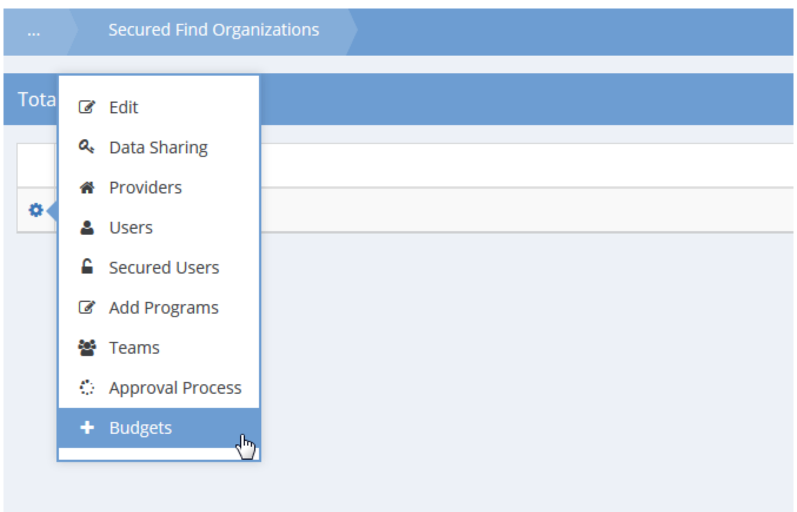
Entity Budget Summary

Objective: Create a budget for a secured organization.

Navigation: Administration>Setup>Secured Organizations

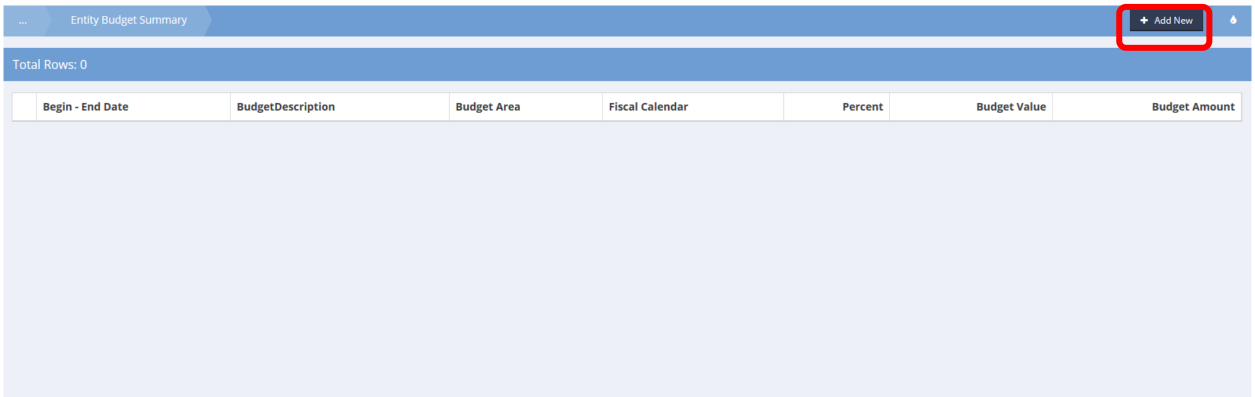


Locate the desired organization or create a new organization using the New Organization button or Add New w/ Sharing button at the top of the form. The created organization displays in the list.

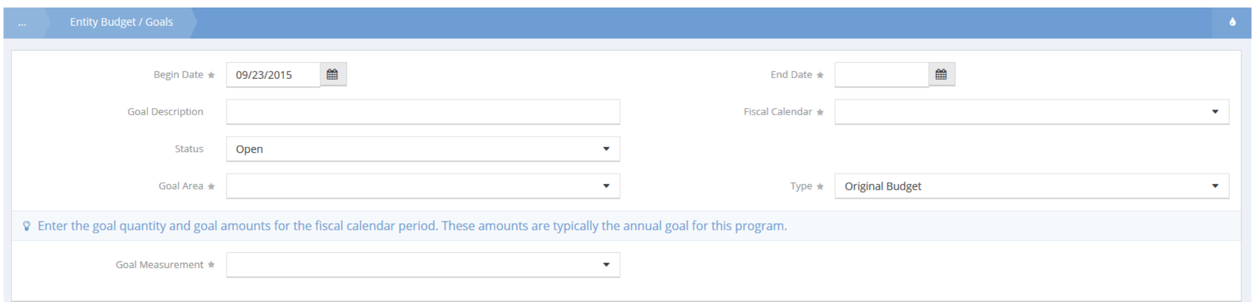


On the desired organization, click the action gear and click Budgets.

The Entity Budget Summary form displays.



Click the Add New button to create a new budget. The Entity Budget / Goals form displays.

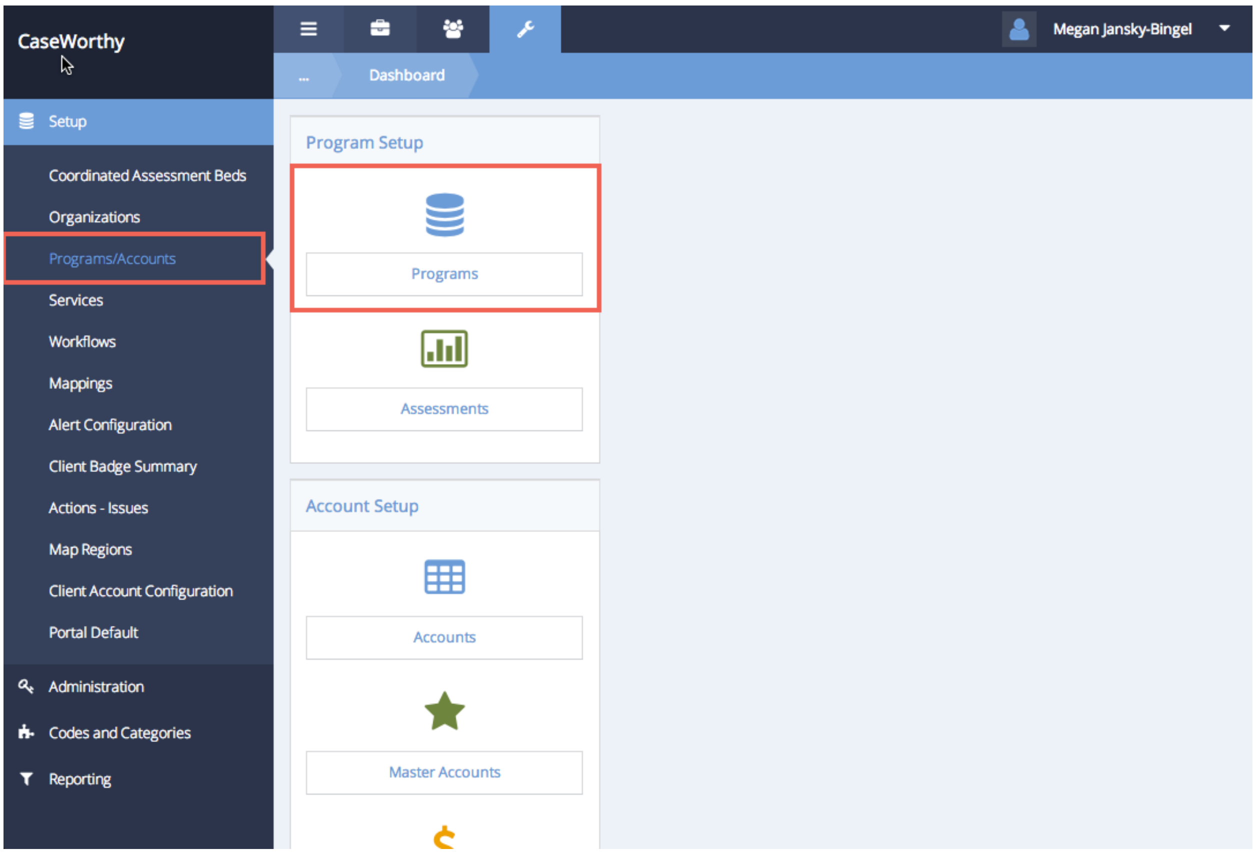


Enter a start and end date, enter a goal description, select a fiscal calendar, select a goal area, and, finally, select a goal measurement. Click the Save button when finished.

Program Options

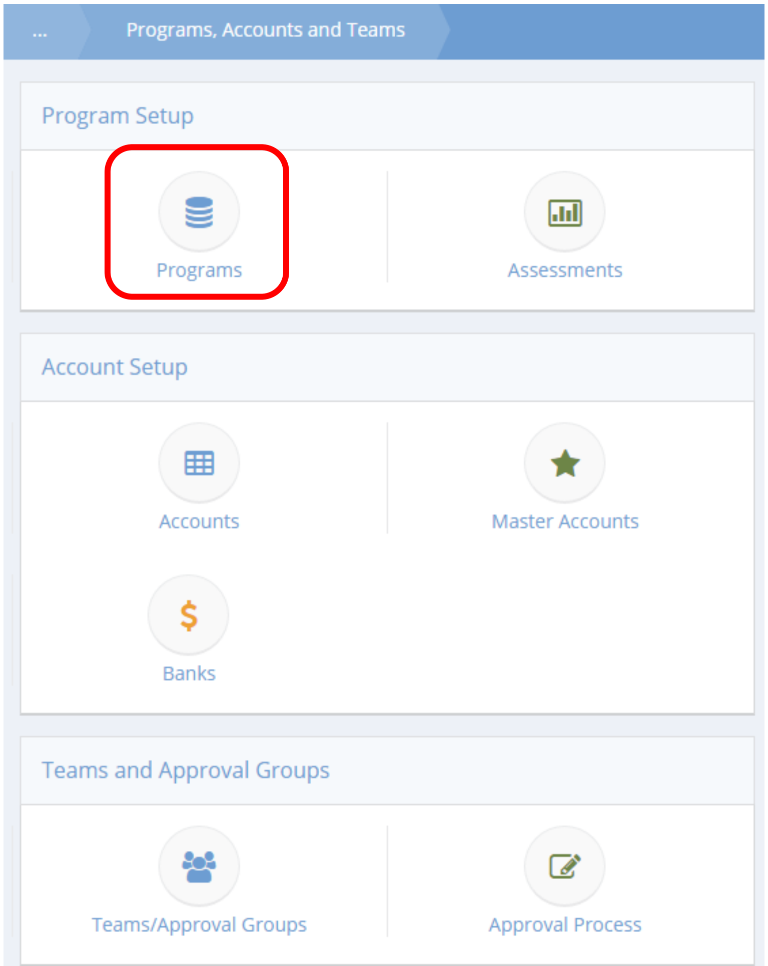
(Administration>Setup>Programs/Accounts>Programs)

There are a variety of options for configuring and mapping within the Program area; including HMIS Setup, Assessments, Outcomes and Program Budgets. To access these features, click on the "Programs/Accounts" link on the Setup menu then select the "Program" icon. Navigate to the desired program, click the action gear, and select the desired option. To use Program Contracts, Program Billing Service Summary, Accounts/Funding Sources or Documents features, please contact a CaseWorthy™ Project Manager.



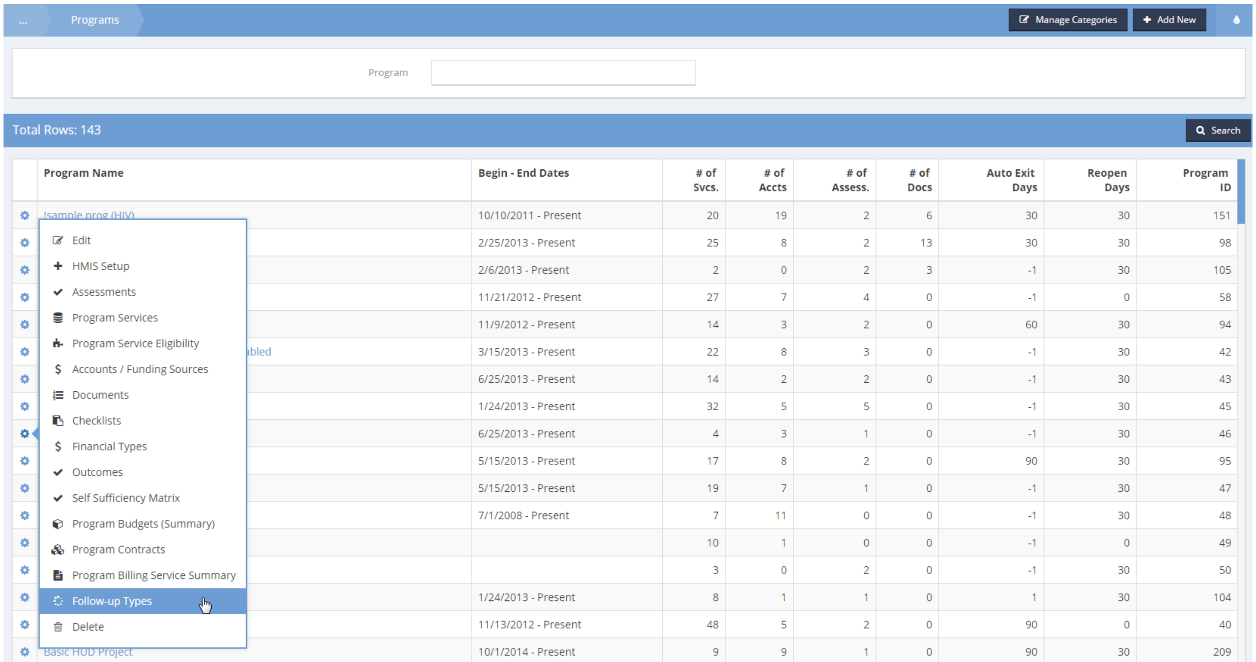
Program Follow-up Types

(Administration>Setup>Programs and Accounts)

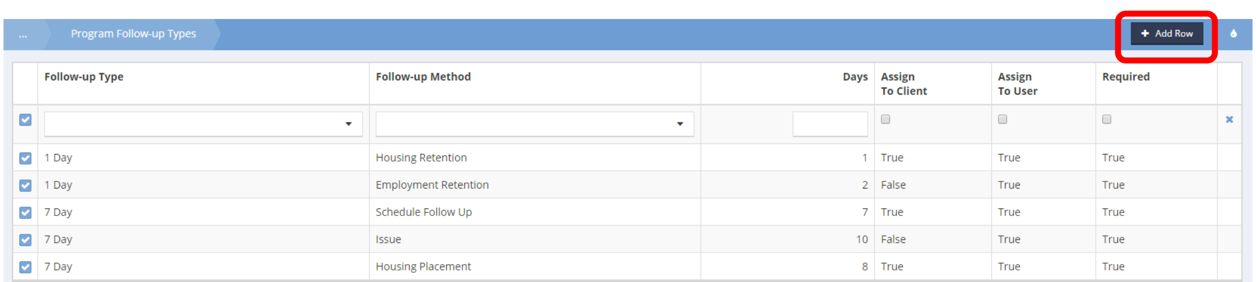


Click the Program icon.

The Programs form displays.



Click the action gear icon and click Follow-up Types on the desired program. The Program Follow-up Types form displays.

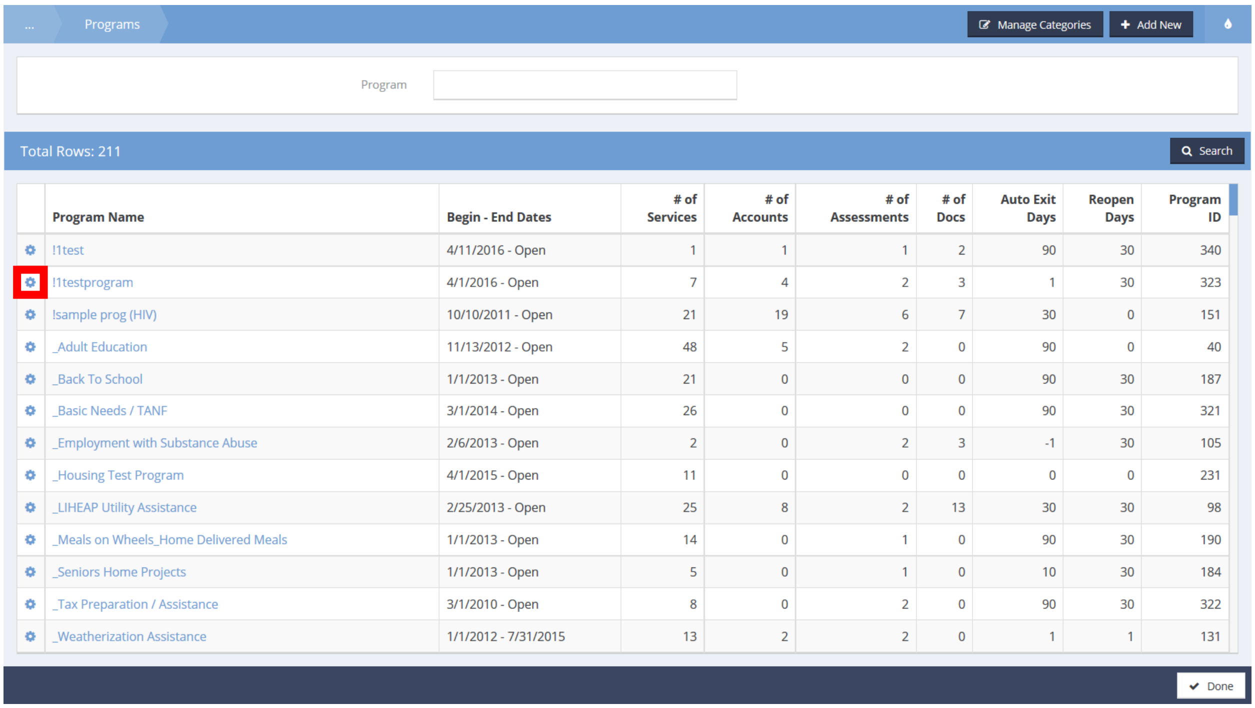


Click the Add Row button to create a new follow-up or click the blue checkbox icon to edit an existing follow-up. Select a type, method and enter the number of days. Click the checkboxes to assign to client, assign to user and make required as desired. Click Save when finished.

Programs Positions

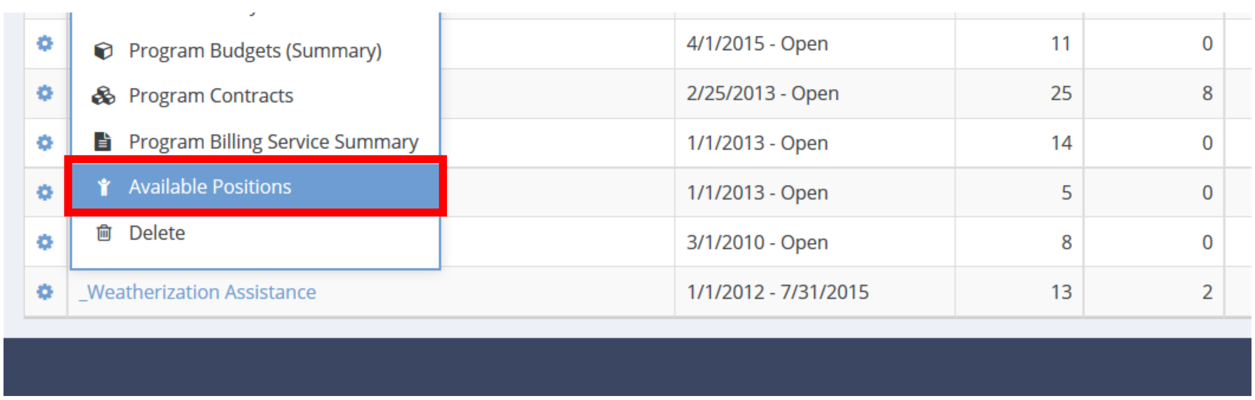
Objective: Create and edit available job positions by program.

Navigation: Administration>Setup>Programs and Accounts

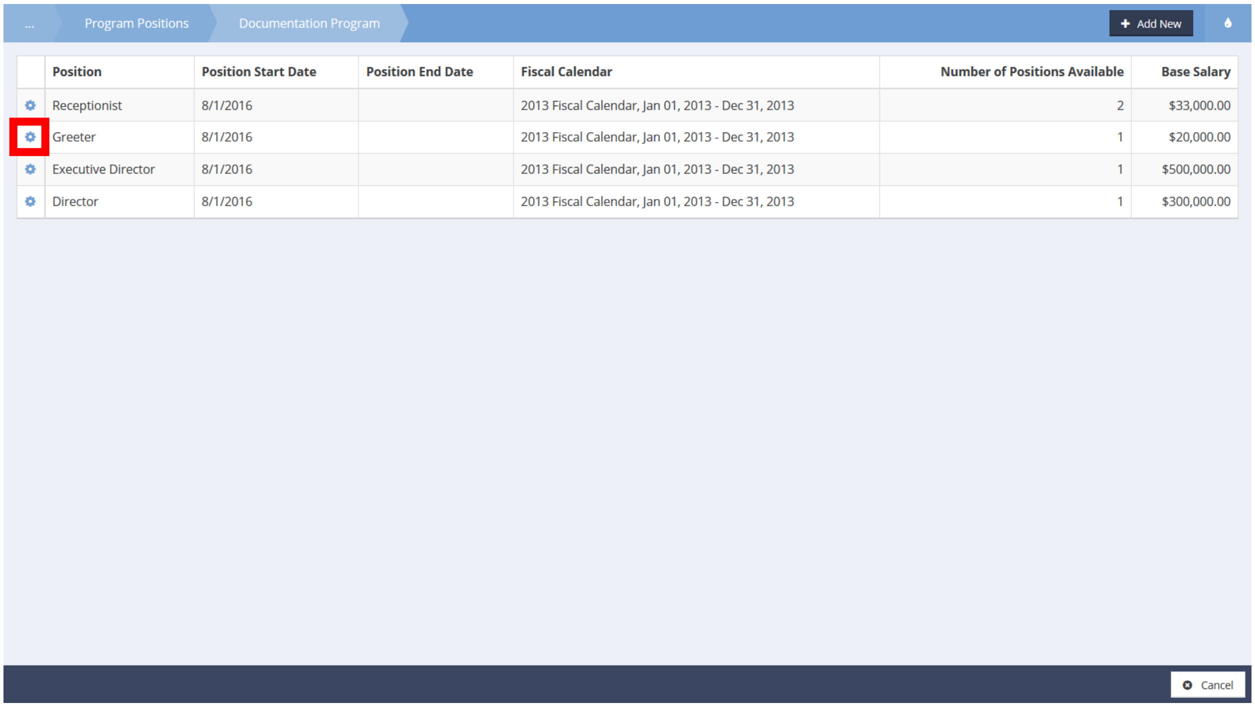


	Program Name	Begin - End Dates	# of Services	# of Accounts	# of Assessments	# of Docs	Auto Exit Days	Reopen Days	Program ID
	!1test	4/11/2016 - Open	1	1	1	2	90	30	340
	!1testprogram	4/1/2016 - Open	7	4	2	3	1	30	323
	!sample prog (HIV)	10/10/2011 - Open	21	19	6	7	30	0	151
	_Adult Education	11/13/2012 - Open	48	5	2	0	90	0	40
	_Back To School	1/1/2013 - Open	21	0	0	0	90	30	187
	_Basic Needs / TANF	3/1/2014 - Open	26	0	0	0	90	30	321
	_Employment with Substance Abuse	2/6/2013 - Open	2	0	2	3	-1	30	105
	_Housing Test Program	4/1/2015 - Open	11	0	0	0	0	0	231
	_LIHEAP Utility Assistance	2/25/2013 - Open	25	8	2	13	30	30	98
	_Meals on Wheels_Home Delivered Meals	1/1/2013 - Open	14	0	1	0	90	30	190
	_Seniors Home Projects	1/1/2013 - Open	5	0	1	0	10	30	184
	_Tax Preparation / Assistance	3/1/2010 - Open	8	0	2	0	90	30	322
	_Weatherization Assistance	1/1/2012 - 7/31/2015	13	2	2	0	1	1	131

From the Programs form, click the action gear icon associated with the desired program and select Available Positions from the menu options.

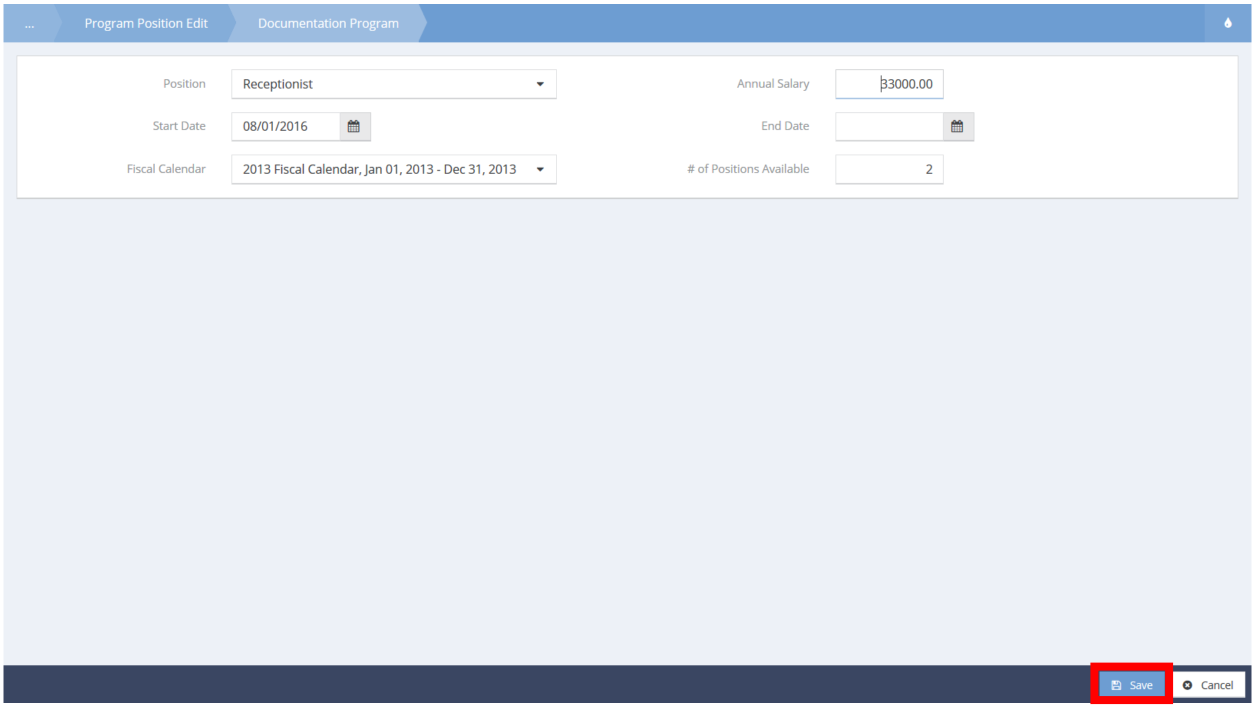


The Program Positions form displays.



Available program positions display. Click the action gear icon associated with the desired position to Edit or Delete position. Select Edit from the menu options.

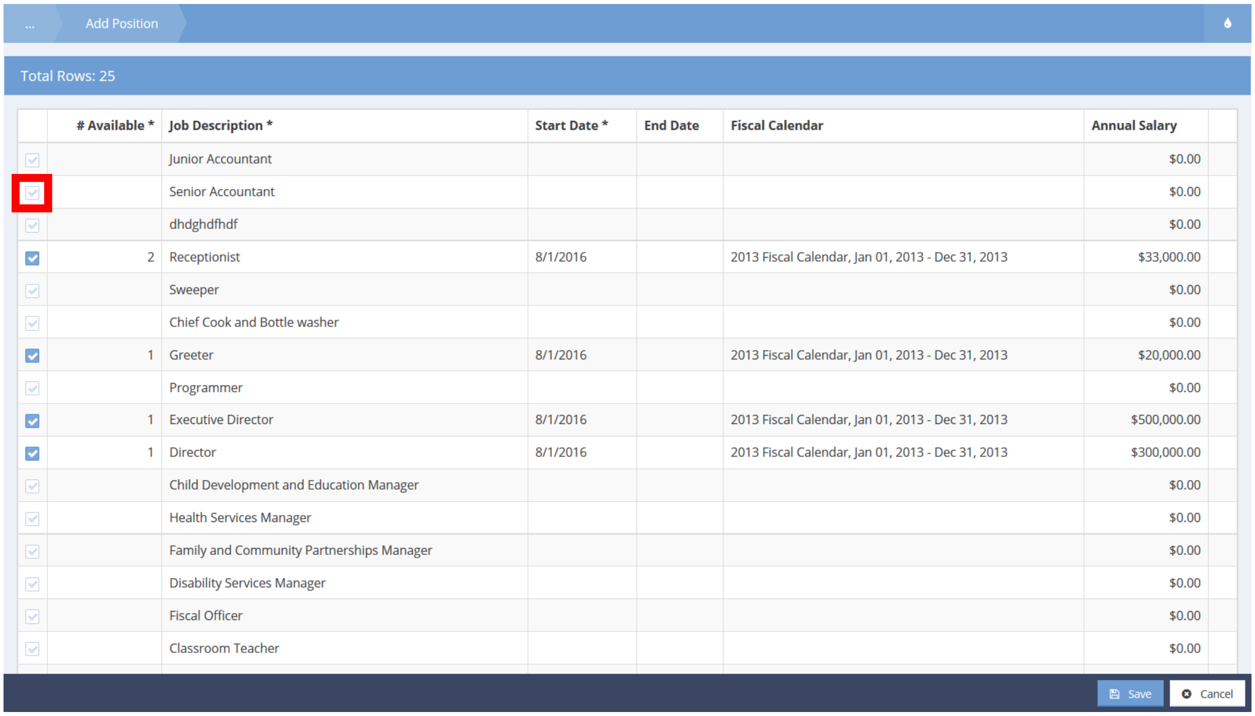
The Program Position Edit form displays.



Edit any existing information about the position. Click the Save button to save and exit.

To add a new position, click the Add New button.

The Add Position form displays.



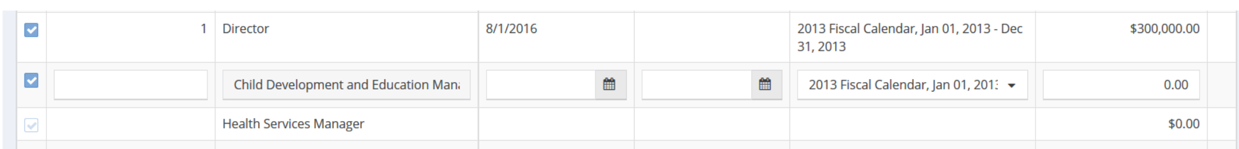
... Add Position

Total Rows: 25

	# Available *	Job Description *	Start Date *	End Date	Fiscal Calendar	Annual Salary
		Junior Accountant				$0.00
		Senior Accountant				$0.00
		dhdghdfhdf				$0.00
	2	Receptionist	8/1/2016		2013 Fiscal Calendar, Jan 01, 2013 - Dec 31, 2013	$33,000.00
		Sweeper				$0.00
		Chief Cook and Bottle washer				$0.00
	1	Greeter	8/1/2016		2013 Fiscal Calendar, Jan 01, 2013 - Dec 31, 2013	$20,000.00
		Programmer				$0.00
	1	Executive Director	8/1/2016		2013 Fiscal Calendar, Jan 01, 2013 - Dec 31, 2013	$500,000.00
	1	Director	8/1/2016		2013 Fiscal Calendar, Jan 01, 2013 - Dec 31, 2013	$300,000.00
		Child Development and Education Manager				$0.00
		Health Services Manager				$0.00
		Family and Community Partnerships Manager				$0.00
		Disability Services Manager				$0.00
		Fiscal Officer				$0.00
		Classroom Teacher				$0.00

Save Cancel

Click the clear checkbox icon associated with the desired position to add it to the program. The clear checkbox changes to blue, indicating selection. The row expands.

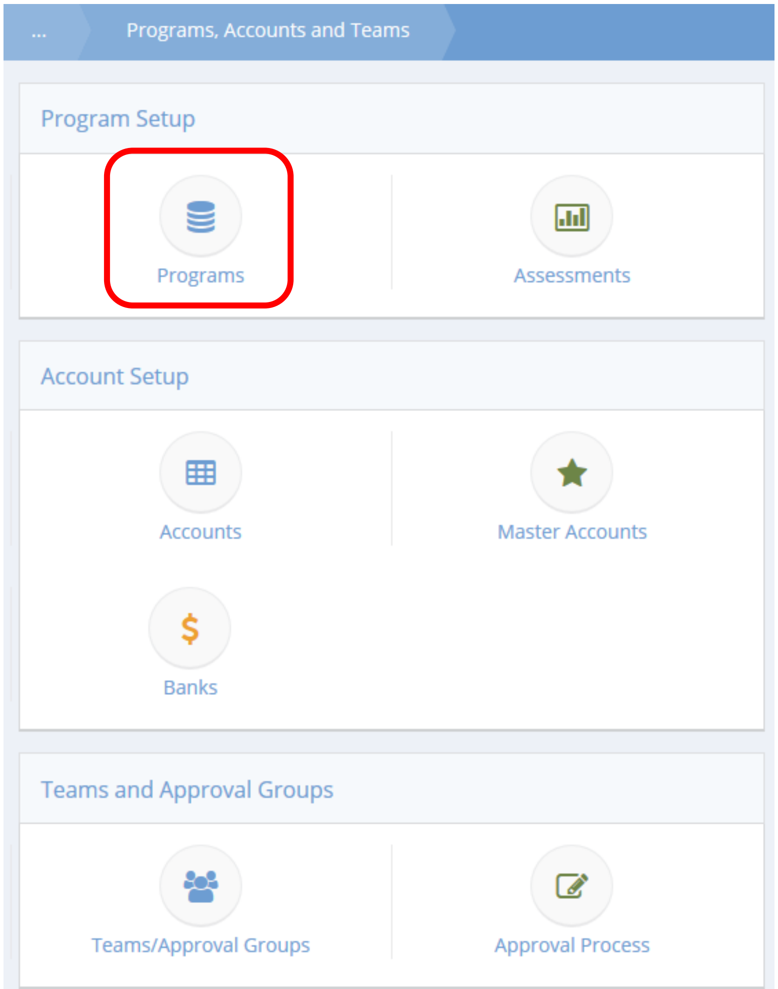


	1	Director	8/1/2016		2013 Fiscal Calendar, Jan 01, 2013 - Dec 31, 2013	$300,000.00
		Child Development and Education Mana			2013 Fiscal Calendar, Jan 01, 201	0.00
		Health Services Manager				$0.00
		Family and Community Partnerships				$0.00

Indicate the "# Available" positions, a start date, as well as any other desire information. Click the Save button to save and exit.

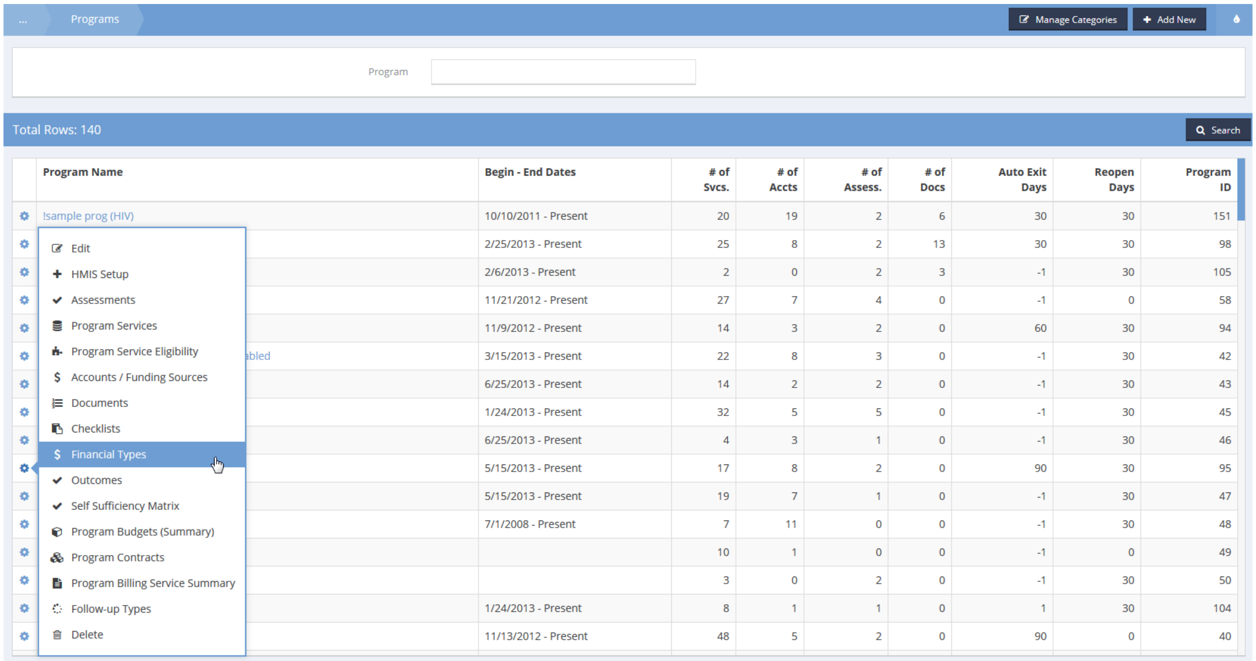
Program Financial Types

(Administration>Setup>Programs and Accounts)

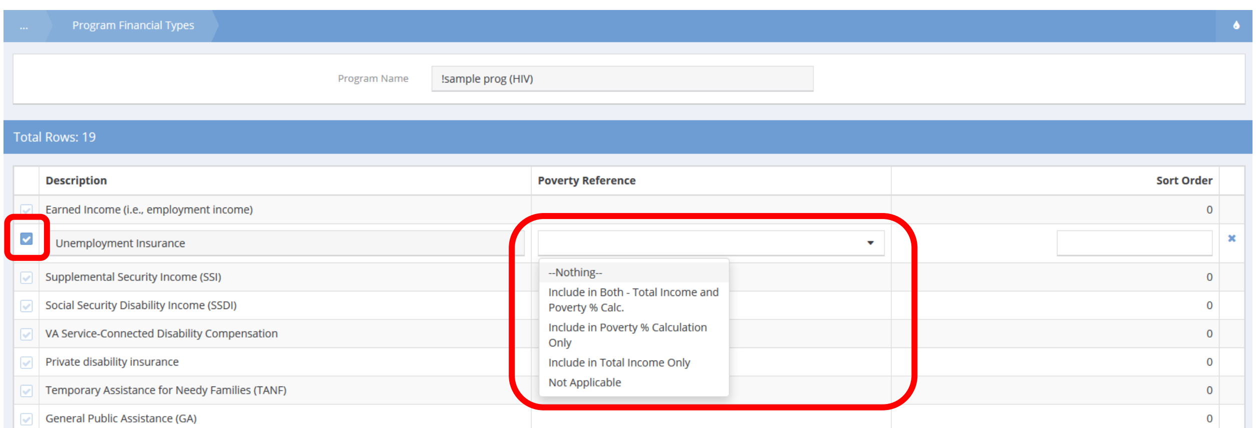


Click the icon for Programs.

The Programs form displays.



On the desired program, click the action gear icon and click Financial Types. The Program Financial Types form displays.



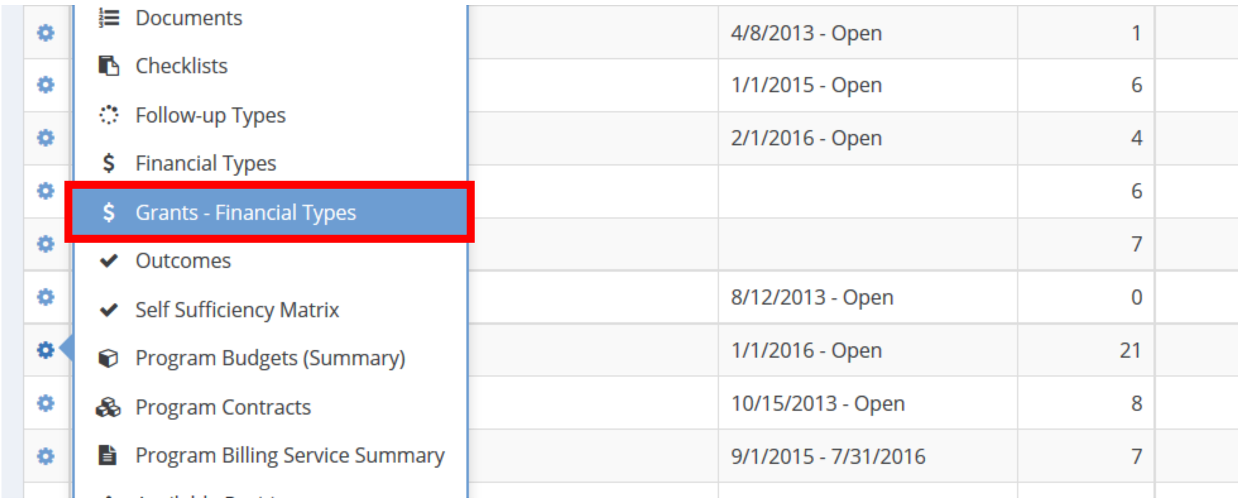
To add a program financial type, click the clear checkbox icon and select a poverty reference from the drop-down list. Click the Save button when finished.

Grants – Financial Types

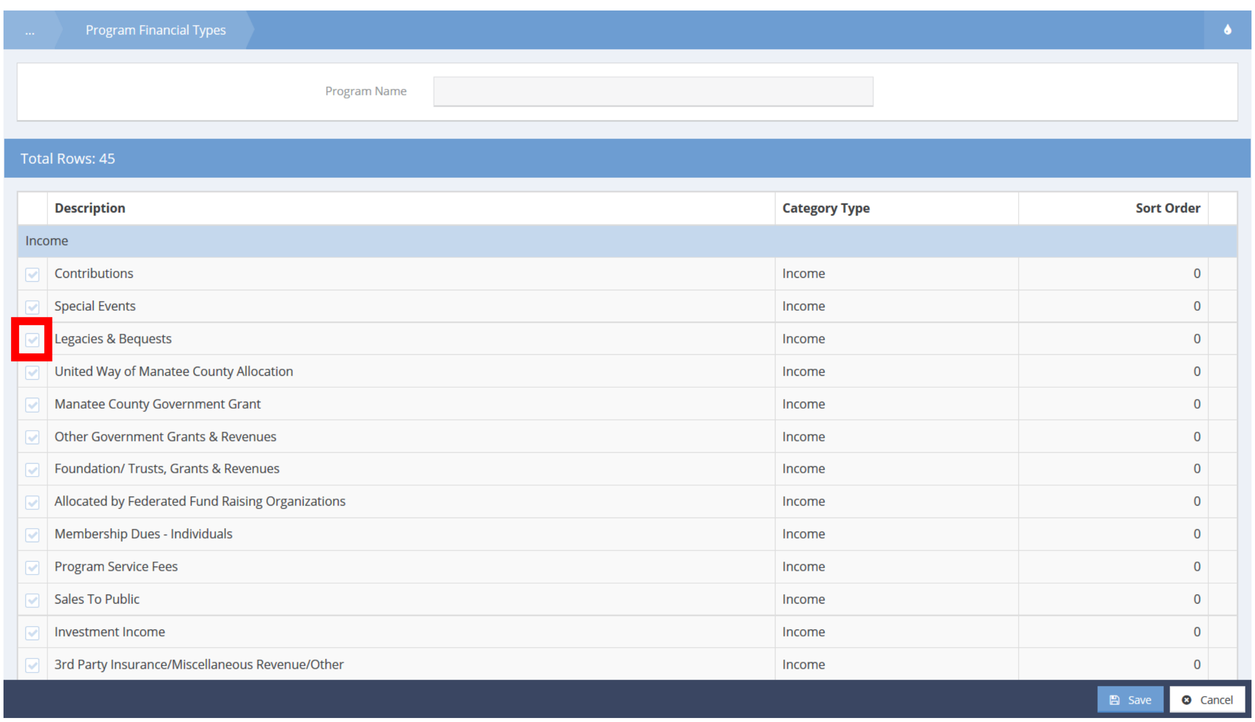
Objective: Manage program specific grant financial types.

Navigation: Administration>Setup>Programs and Accounts

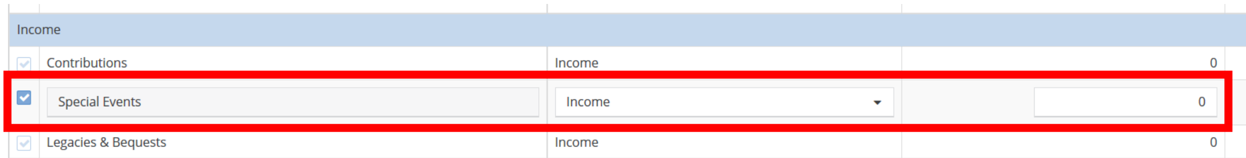
Select Grants from the action gear icon menu from the Programs form.



The Program Financial Types form displays.



Click the clear checkbox icon to link a financial type to the selected program. The checkbox turns to blue , indicating selection. The row expands.

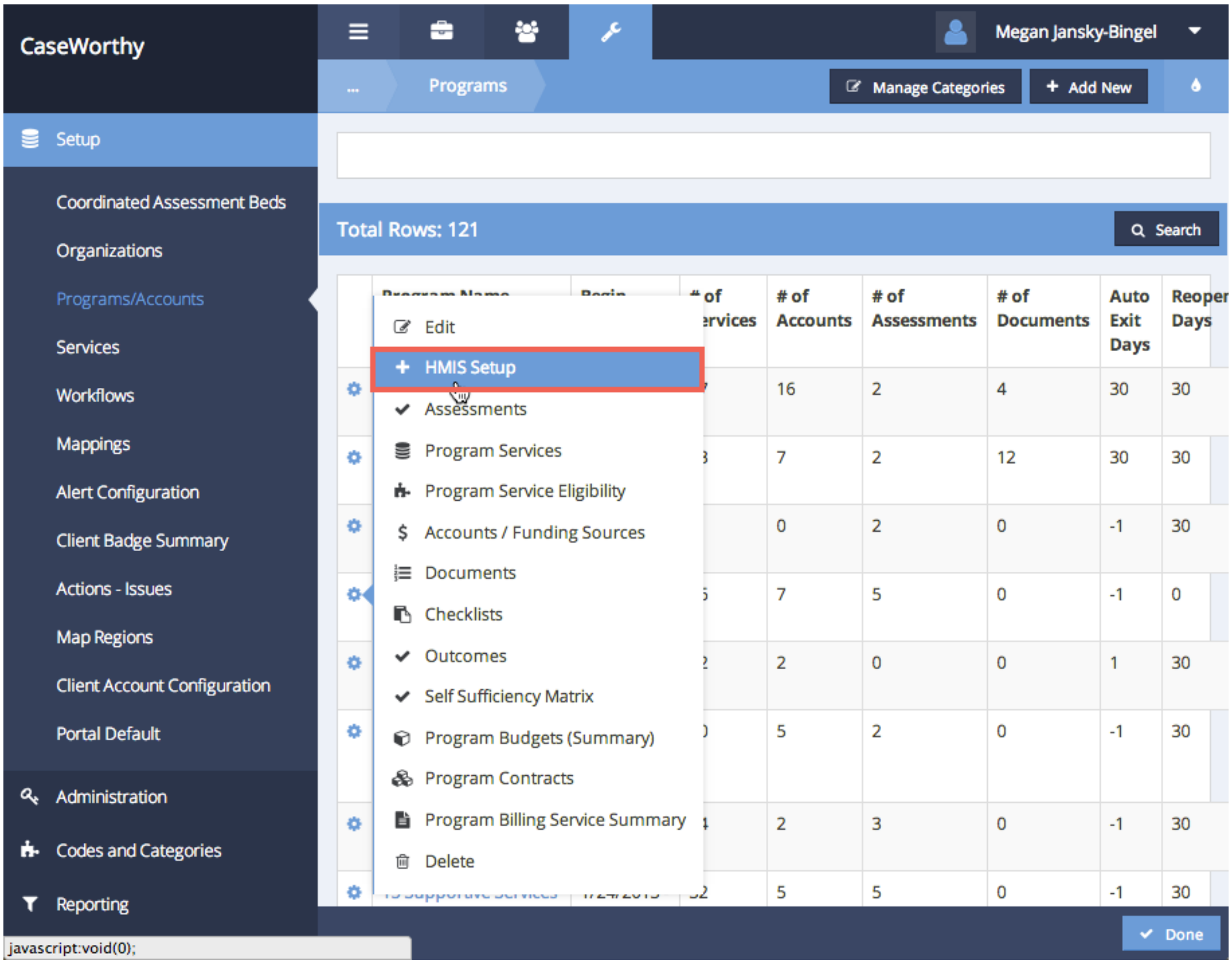


Select a category type from the drop-down list. Click the Save button when finished.

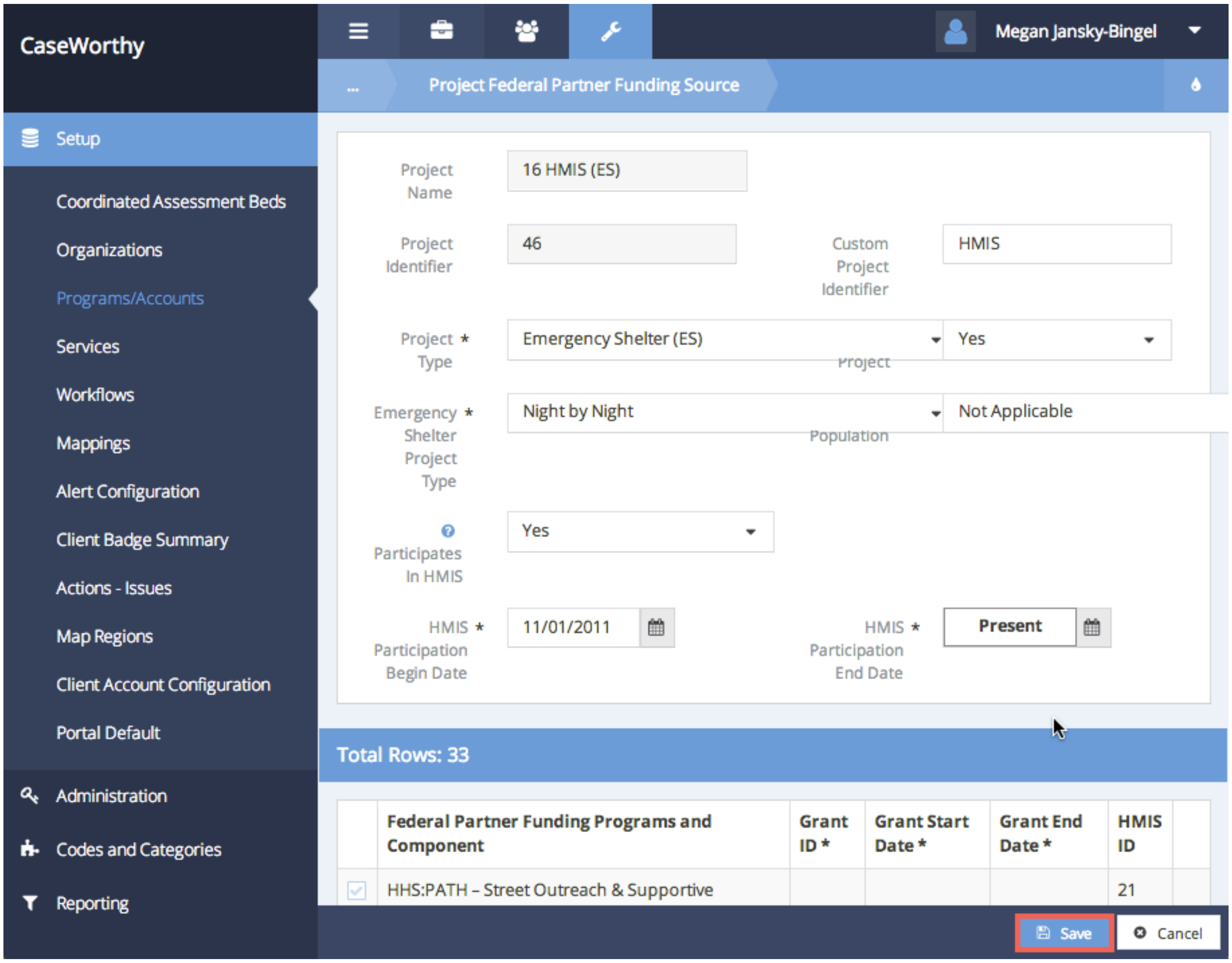
HMIS Set Up

(Administration>Setup>Programs/Accounts>Programs>HMIS Setup)

HMIS Setup associates grant information with the selected program. CaseWorthy™ reads this information and incorporate it into relevant baseline HMIS reports. From the Program summary form, navigate to the desired program, click the action gear, and select “HMIS Setup”.



The Project Federal Partner Funding Source form displays. Enter all relevant and required information. Please refer to any appropriate grant documents to complete this form. When all desired data has been entered, click the Save button on the bottom right side of the form.

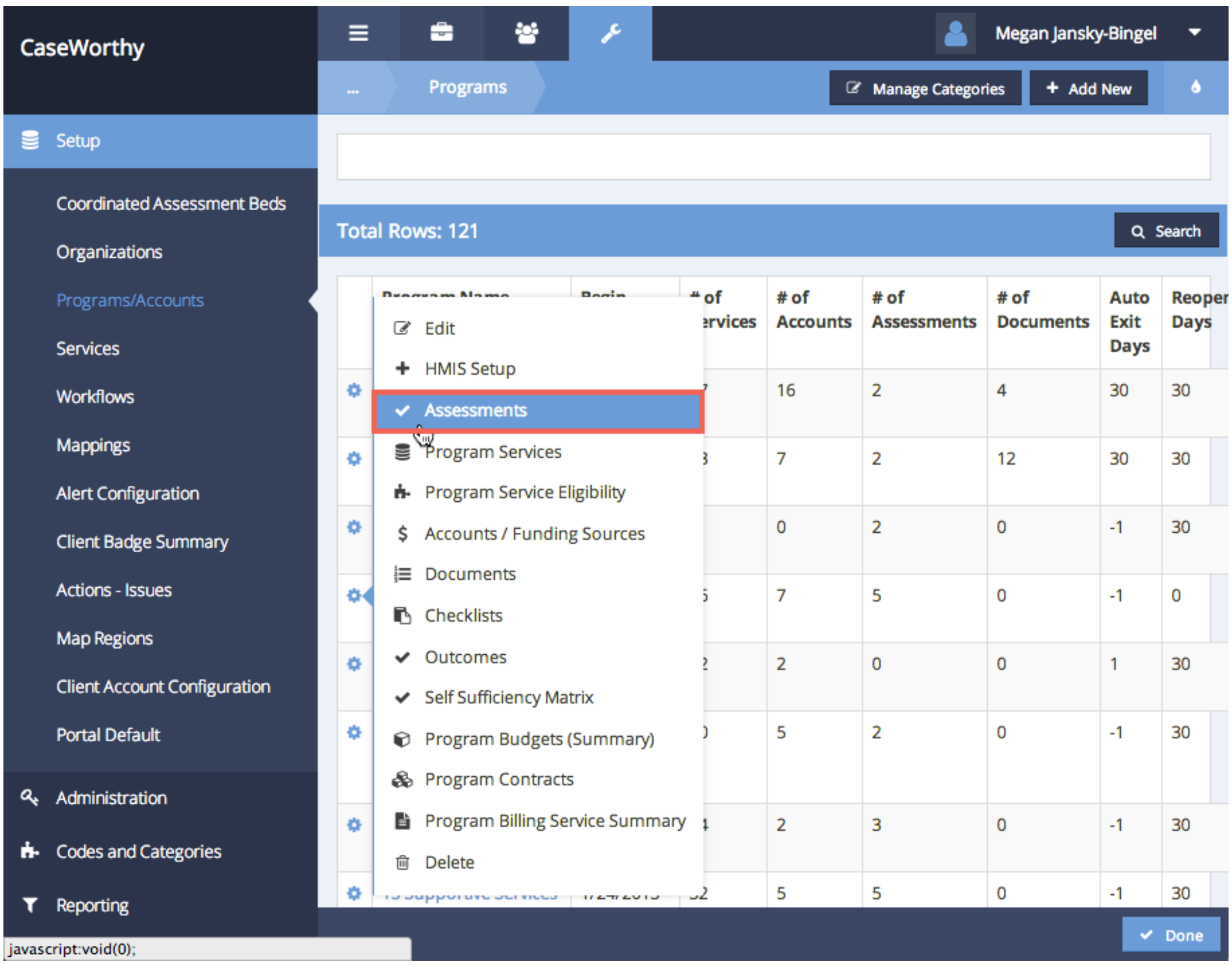

CaseWorthy
Megan Jansky-Bingel
...
Project Federal Partner Funding Source
Setup
Coordinated Assessment Beds
Organizations
Programs/Accounts
Services
Workflows
Mappings
Alert Configuration
Client Badge Summary
Actions - Issues
Map Regions
Client Account Configuration
Portal Default
Administration
Codes and Categories
Reporting
Project Name
16 HMIS (ES)
Project Identifier
46
Custom Project Identifier
HMIS
Project Type *
Emergency Shelter (ES)
Yes
Emergency Shelter Project Type *
Night by Night
Not Applicable
Participates In HMIS
Yes
HMIS Participation Begin Date *
11/01/2011
HMIS Participation End Date *
Present
Total Rows: 33
Federal Partner Funding Programs and Component
Grant ID *
Grant Start Date *
Grant End Date *
HMIS ID
HHS:PATH – Street Outreach & Supportive
21
Save
Cancel

Linking Assessments to Programs

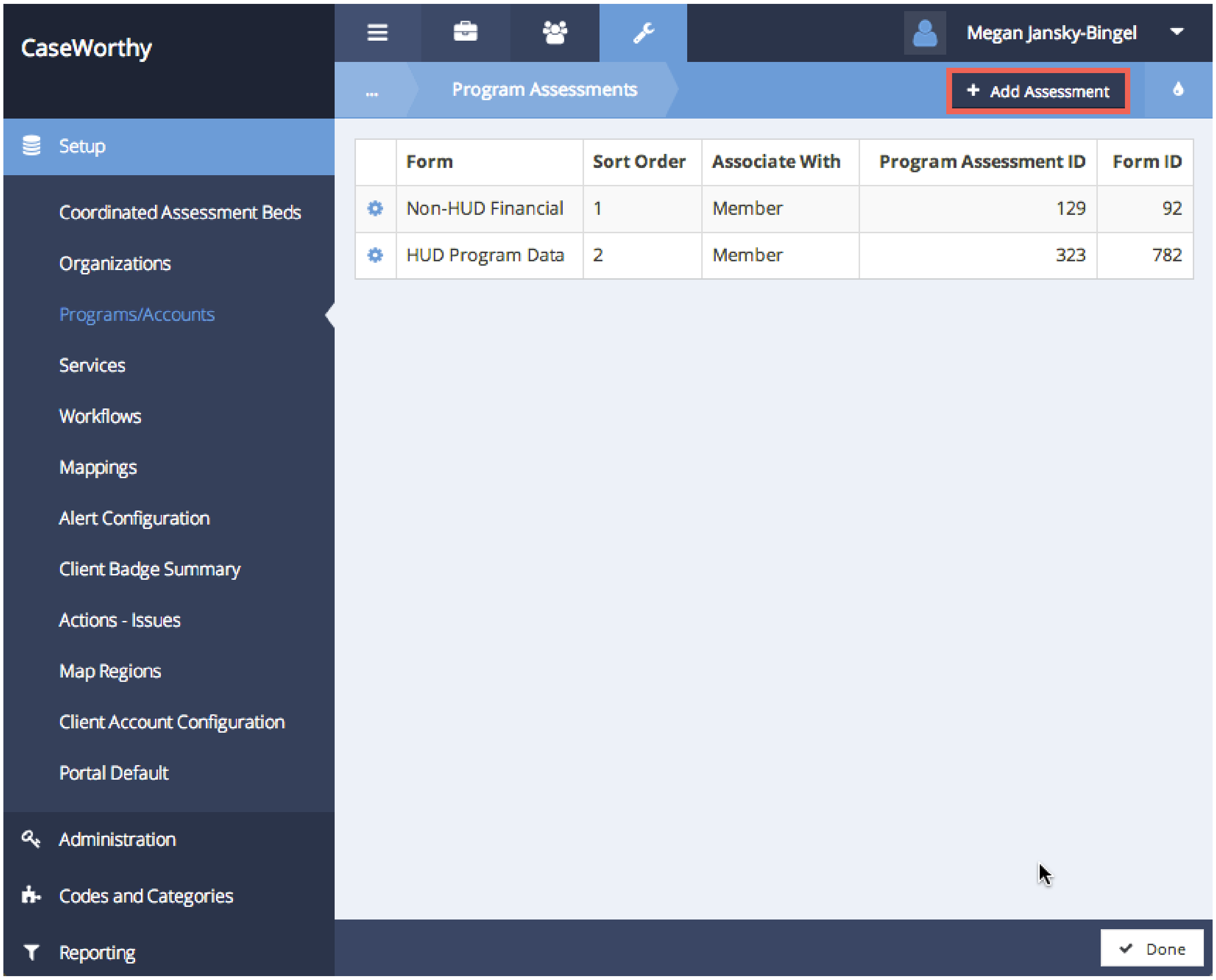
(Administration>Setup>Programs/Accounts>Programs>Assessments)

All baseline assessments are stored on the Assessment form. For information on how to add custom assessments to this area, see the “Assessments” section of this manual.

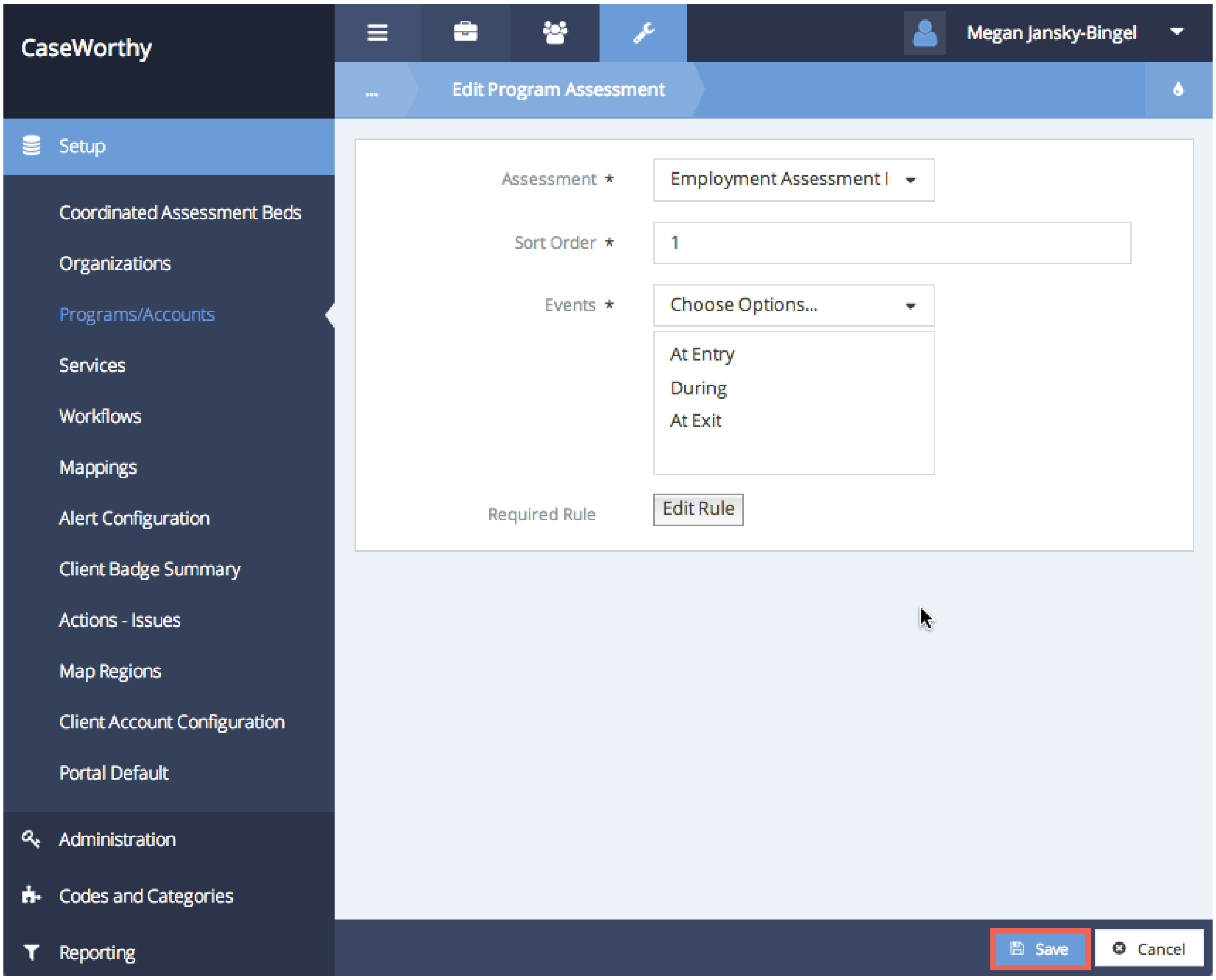
To associate assessments with a program, navigate to the Program summary form, find the desired program, click the action gear, and select “Assessments”.



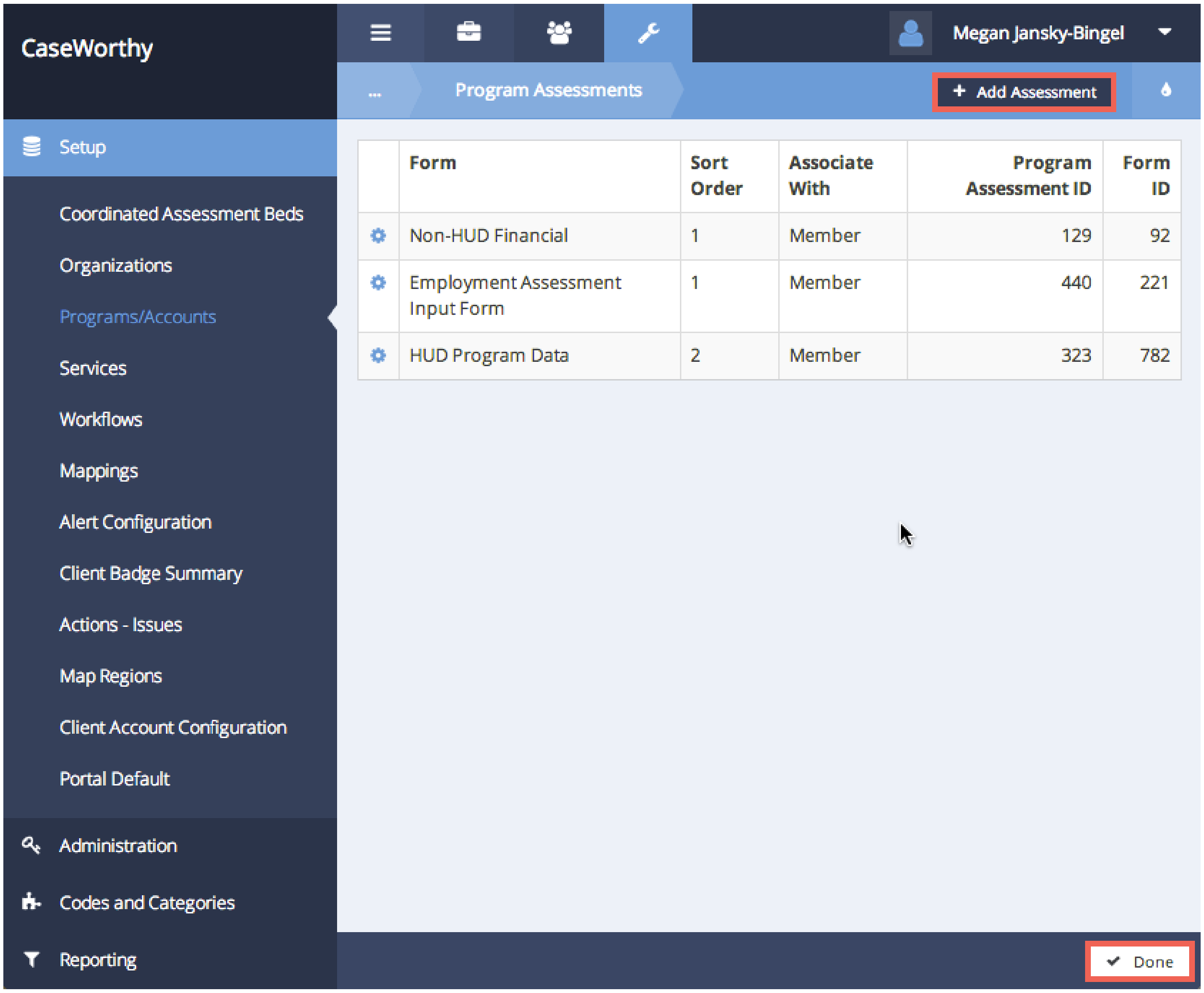
The Program Assessments summary form displays. To link assessments to the program, click on the + Add Assessment button on the top right of the form.



On the Edit Program Assessment form, use the drop-down box to select the desired assessment. Enter in a number to assign the sort order the assessment renders in during a workflow. Use the Events multi-select field to indicate when the assessment is required (Entry, Exit, and/or During Program). When all required data has been entered, click the Save button on the bottom right side of the form.



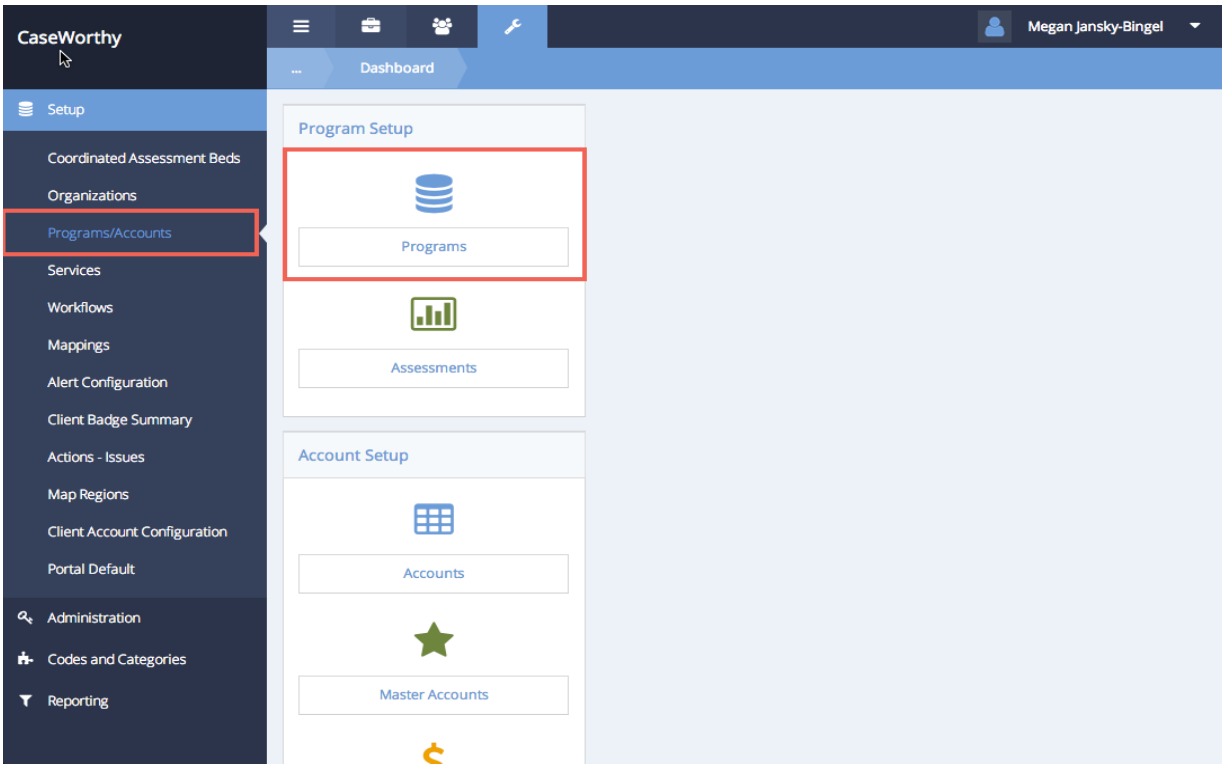
The Program Assessment summary form returns. To link additional assessments, click the + Add Assessment button on the top right. When all desired assessments have been linked, click the ✔ Done button on the bottom right side of the form.


CaseWorthy
Megan Jansky-Bingel
...
Program Assessments
Add Assessment
Setup
Coordinated Assessment Beds
Organizations
Programs/Accounts
Services
Workflows
Mappings
Alert Configuration
Client Badge Summary
Actions - Issues
Map Regions
Client Account Configuration
Portal Default
Administration
Codes and Categories
Reporting
Form
Sort Order
Associate With
Program Assessment ID
Form ID
Non-HUD Financial
1
Member
129
92
Employment Assessment Input Form
1
Member
440
221
HUD Program Data
2
Member
323
782
Done

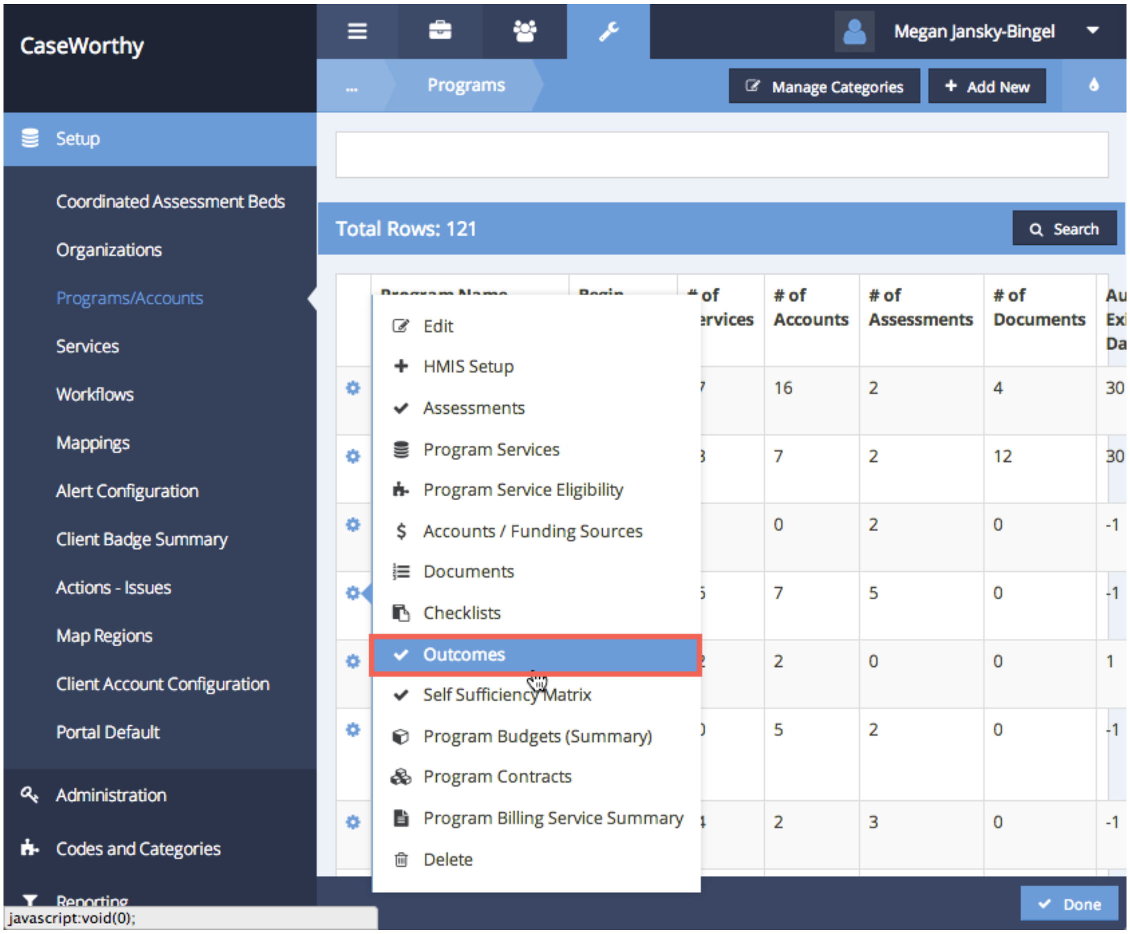
Linking Outcomes to Programs

(Administration>Setup>Programs/Accounts>Programs>Outcomes)

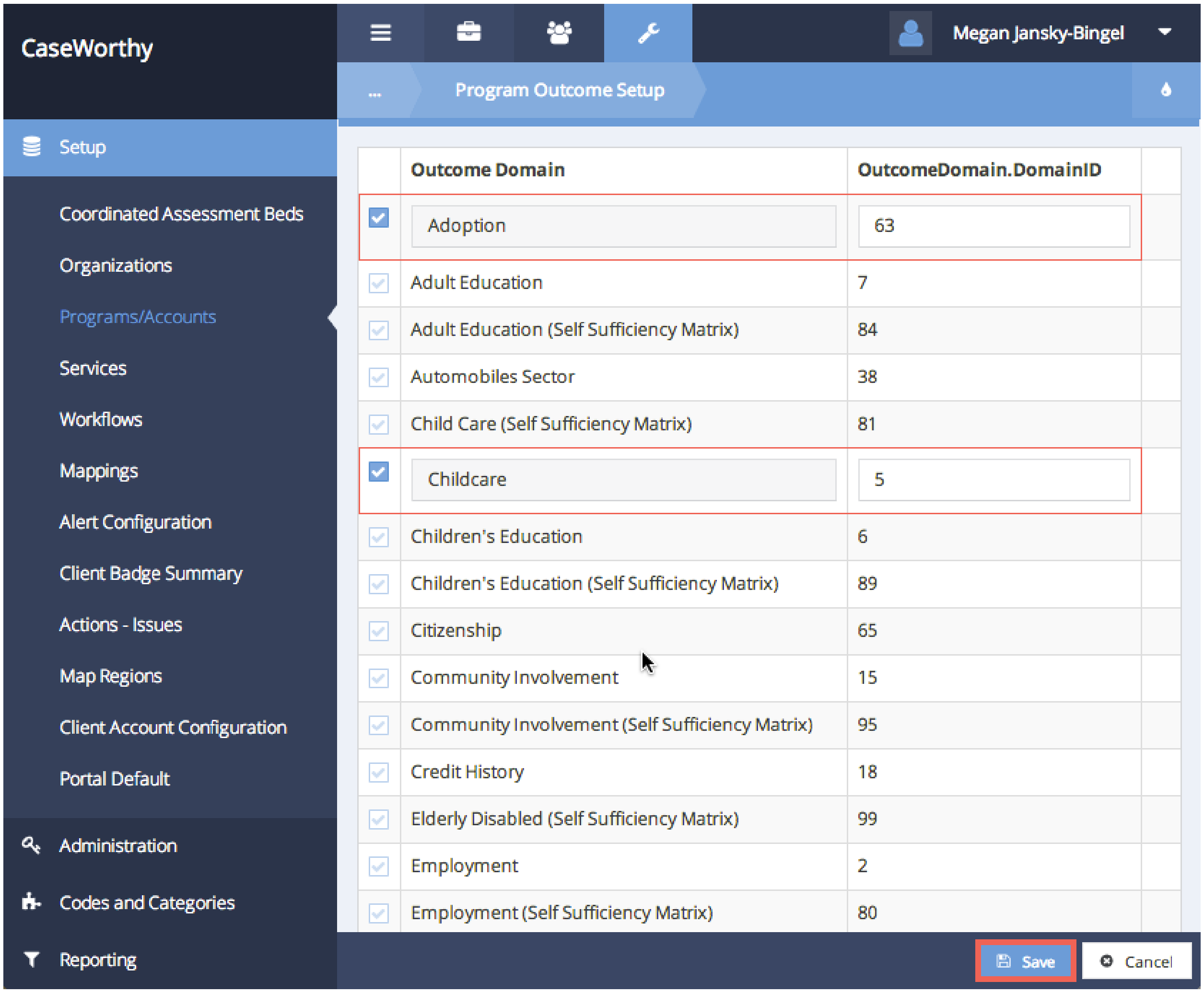
CaseWorthy™ is delivered with numerous baseline outcome domains. To add custom outcomes, see the Outcomes section of this manual. Once all desired outcomes are entered into the system, navigate to the “Programs/Accounts” link on the Setup menu and select the “Program” icon.



Find the desired program, click the action gear  next to the name, and choose “Outcomes” from the list.



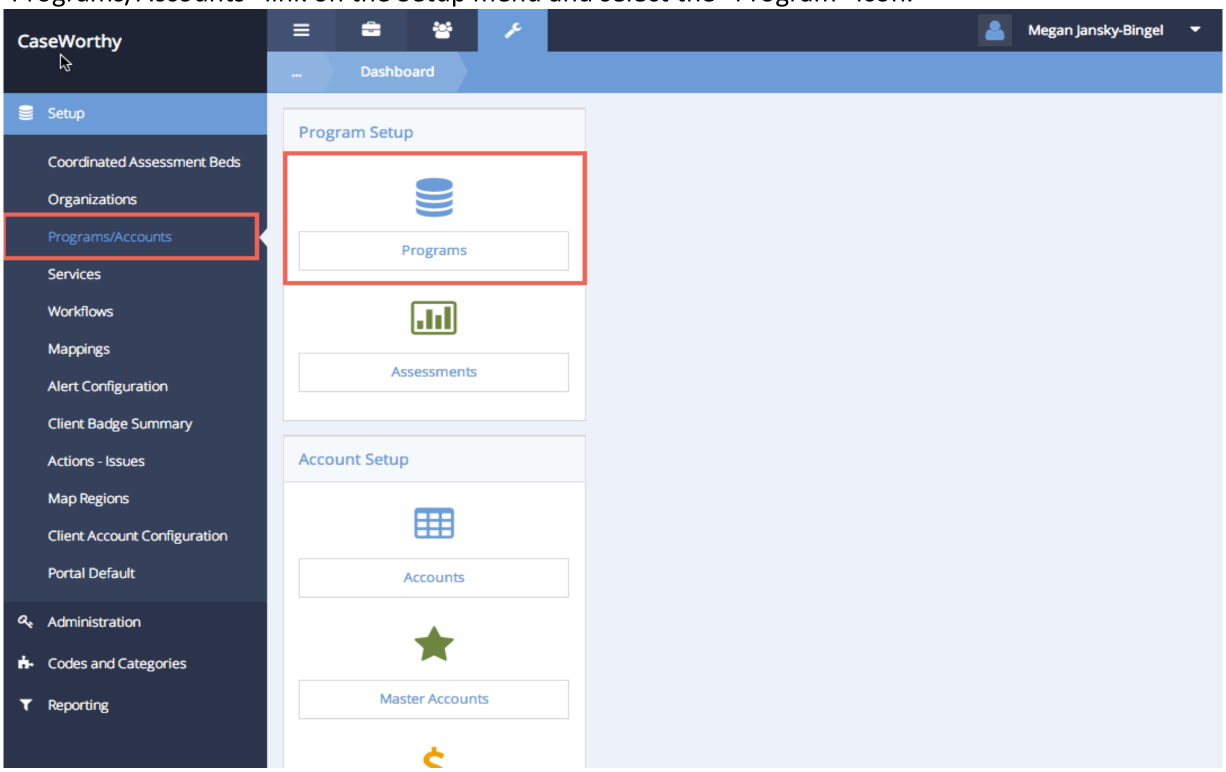
The full list of all outcome domains displays. Select all desired outcomes to link to the program by clicking on each associated clear checkbox. When finished, click Save on the bottom right side of the form.


CaseWorthy
Megan Jansky-Bingel
...
Program Outcome Setup
Setup
Coordinated Assessment Beds
Organizations
Programs/Accounts
Services
Workflows
Mappings
Alert Configuration
Client Badge Summary
Actions - Issues
Map Regions
Client Account Configuration
Portal Default
Administration
Codes and Categories
Reporting
Outcome Domain
OutcomeDomain.DomainID
Adoption
63
Adult Education
7
Adult Education (Self Sufficiency Matrix)
84
Automobiles Sector
38
Child Care (Self Sufficiency Matrix)
81
Childcare
5
Children's Education
6
Children's Education (Self Sufficiency Matrix)
89
Citizenship
65
Community Involvement
15
Community Involvement (Self Sufficiency Matrix)
95
Credit History
18
Elderly Disabled (Self Sufficiency Matrix)
99
Employment
2
Employment (Self Sufficiency Matrix)
80
Save
Cancel

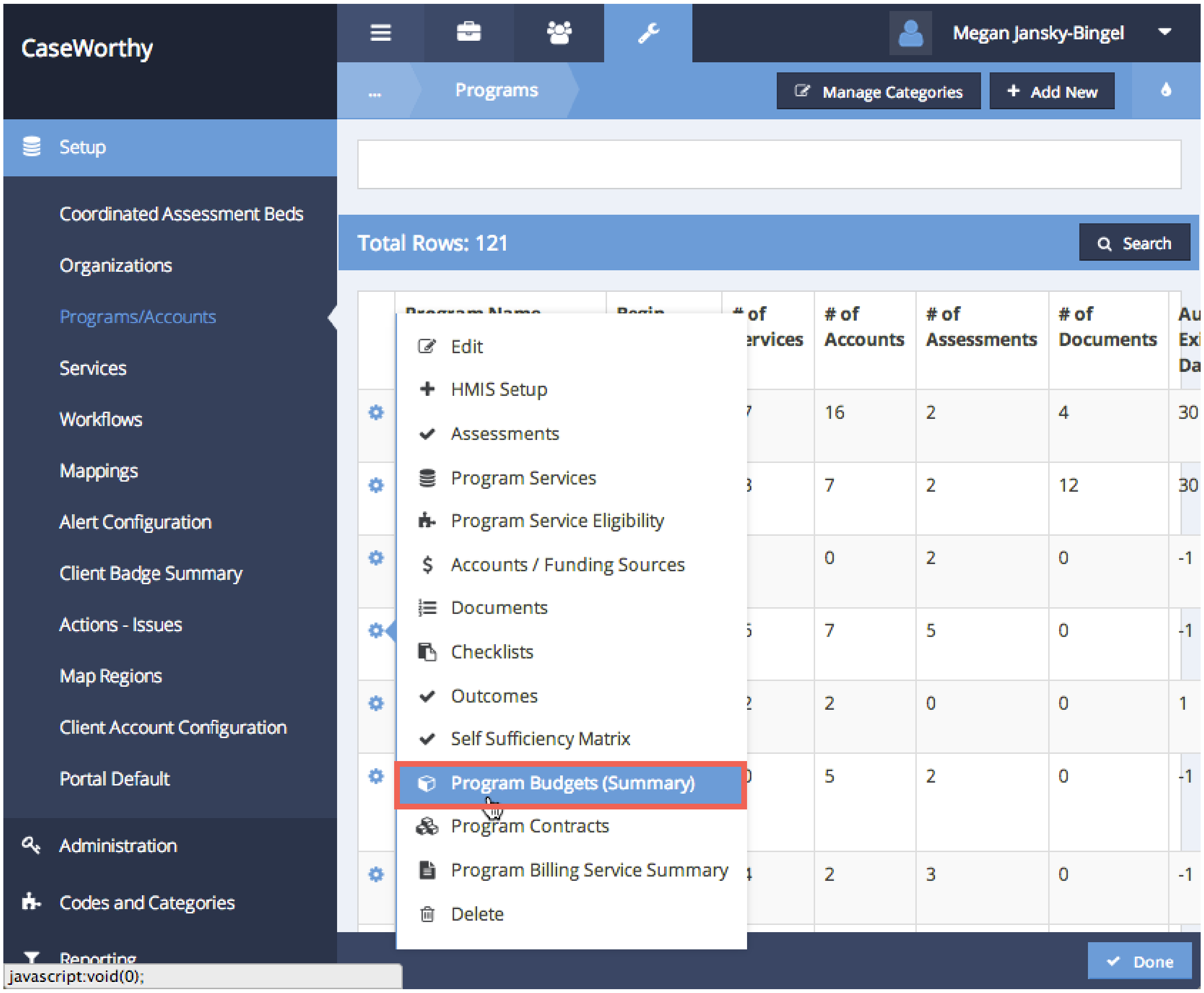
Program Budgets

(Administration>Setup>Programs/Accounts>Programs>Budgets)

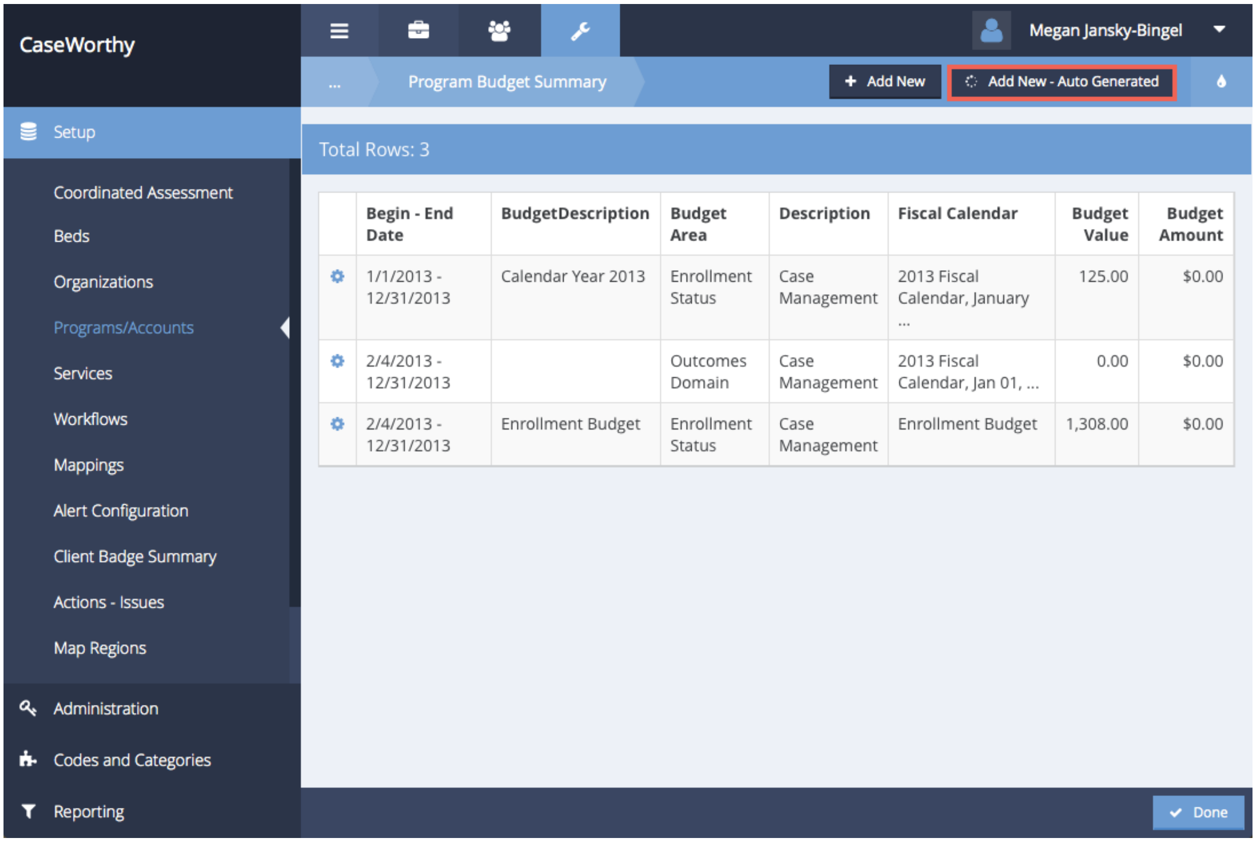
The Program Budgets area allows system administrators to set goals for program enrollments, placements and/or outcomes linked to specific programs. To set up program budgets, navigate to the "Programs/Accounts" link on the Setup menu and select the "Program" icon.



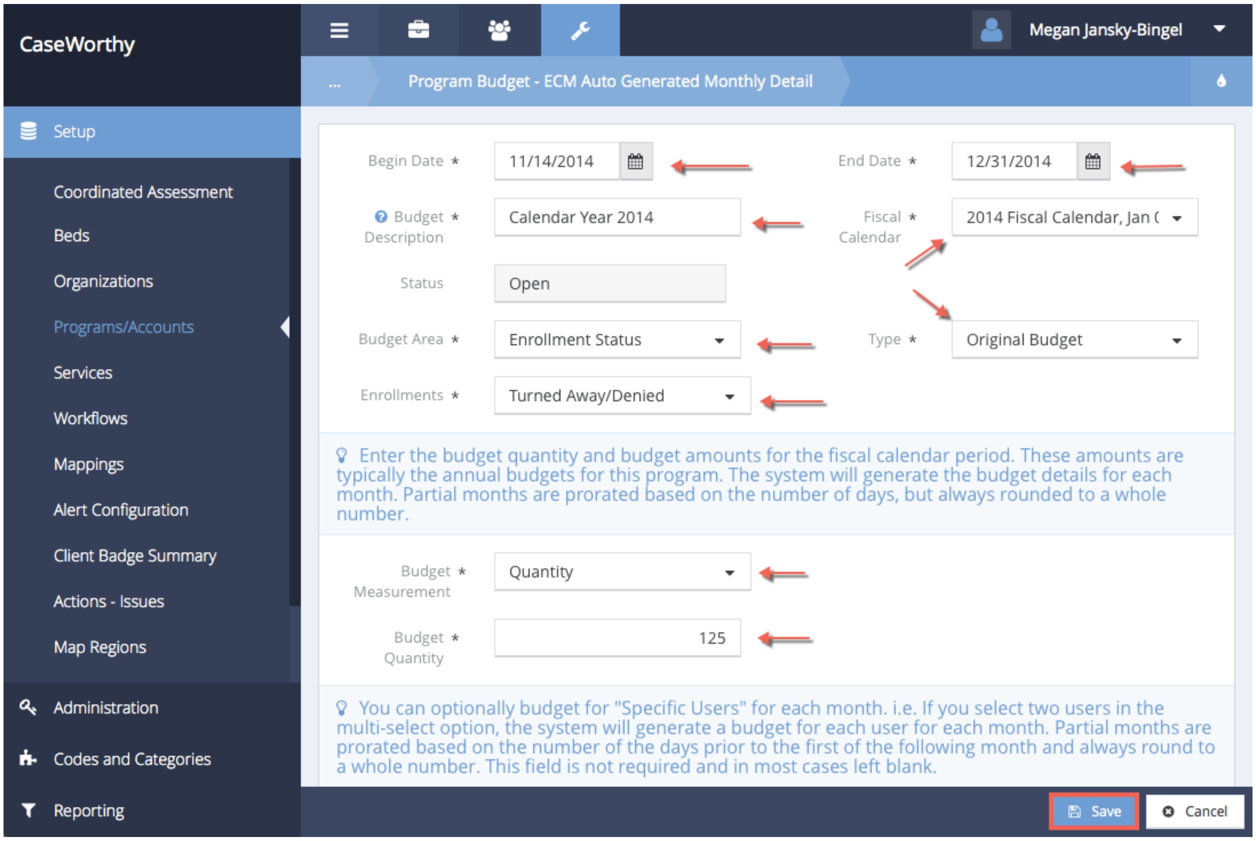
From the Program Summary form, find the desired program, click the action gear, and select "Program Budgets Summary".



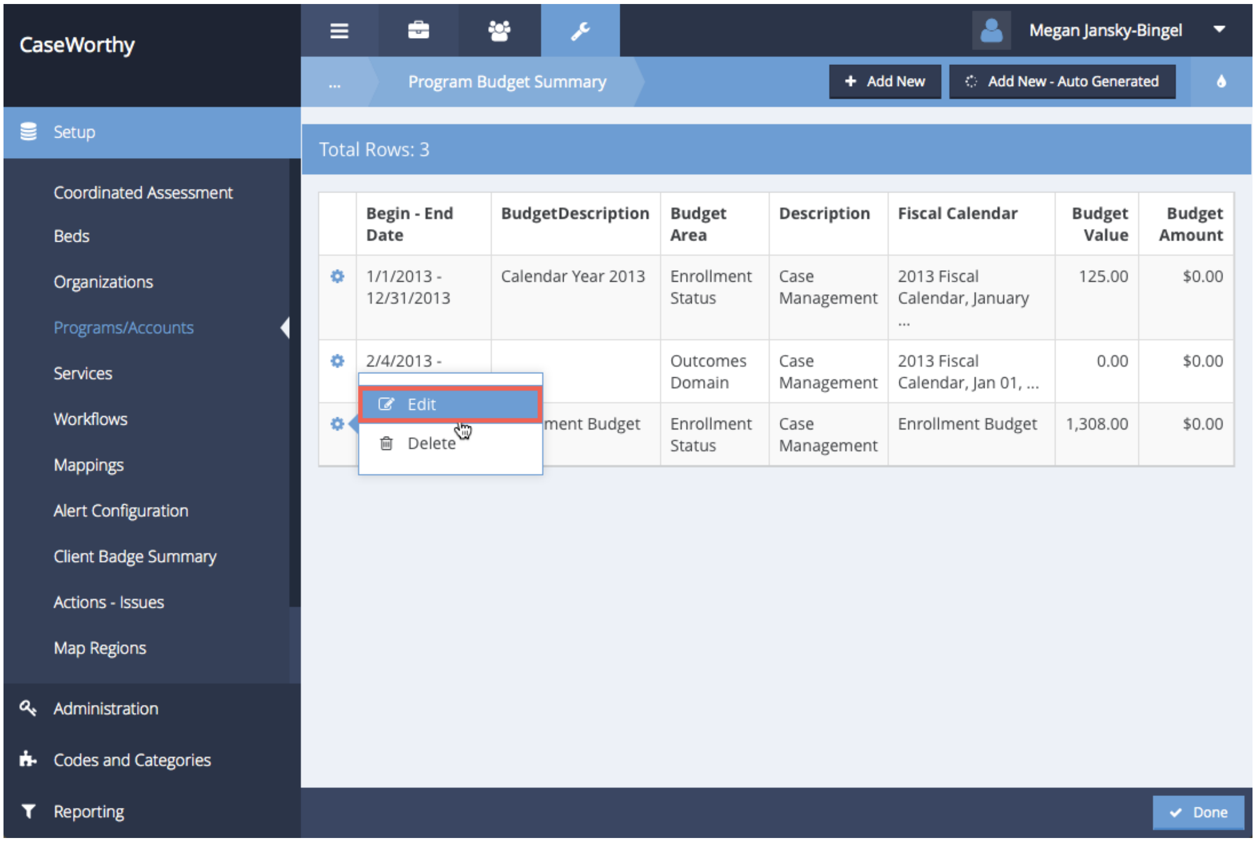
To set up the budget and auto-generate a fiscal calendar, select the Add New - Auto Generated button on the top right.



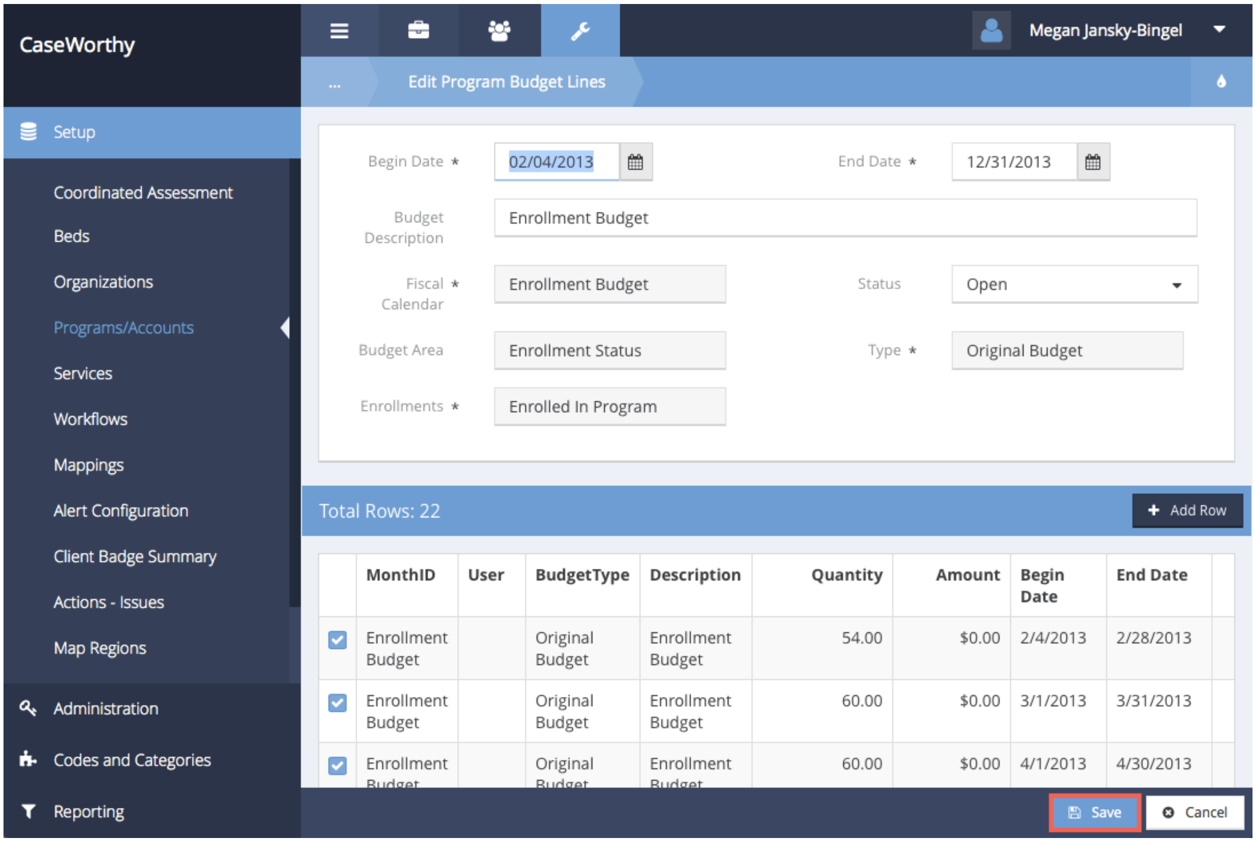
On the Program Budget Auto Generated form, enter the desired fiscal calendar begin and end dates and enter a name or description for the budget/fiscal calendar. The system automatically creates a fiscal calendar with monthly detail. To view the calendar that has been created, navigate to the Codes and Categories menu, select the Financials and Documents link, then the Fiscal Calendar icon. Select the desired budget area (enrollment status, outcome domain, service type) and the budget type (original, revised). Choose the budget Measurement and set a quantity. If desired, budgets can be generated for users. When all relevant/required information has been entered, click the Save button.



The Program Budget Summary form displays. To view projections or edit the program budget, select the action gear next to the desired budget and click on “Edit”.



When finished viewing/editing, click the Save button.

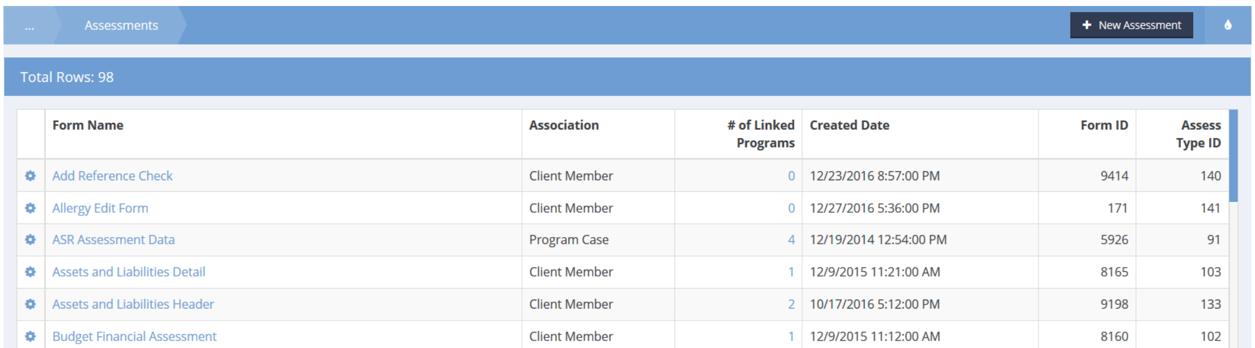

CaseWorthy
Megan Jansky-Bingel
Edit Program Budget Lines
Setup
Coordinated Assessment
Beds
Organizations
Programs/Accounts
Services
Workflows
Mappings
Alert Configuration
Client Badge Summary
Actions - Issues
Map Regions
Administration
Codes and Categories
Reporting
Begin Date * 02/04/2013
End Date * 12/31/2013
Budget Description Enrollment Budget
Fiscal Calendar * Enrollment Budget
Status Open
Budget Area Enrollment Status
Type * Original Budget
Enrollments * Enrolled In Program
Total Rows: 22
Add Row
MonthID User BudgetType Description Quantity Amount Begin Date End Date
Enrollment Budget Original Budget Enrollment Budget 54.00 $0.00 2/4/2013 2/28/2013
Enrollment Budget Original Budget Enrollment Budget 60.00 $0.00 3/1/2013 3/31/2013
Enrollment Budget Original Budget Enrollment Budget 60.00 $0.00 4/1/2013 4/30/2013
Save
Cancel

Programs and Accounts

Objective: View how many programs are linked to a particular assessment.

Navigation: Administration>Setup>Programs and Accounts>Assessments

The Assessments form displays.

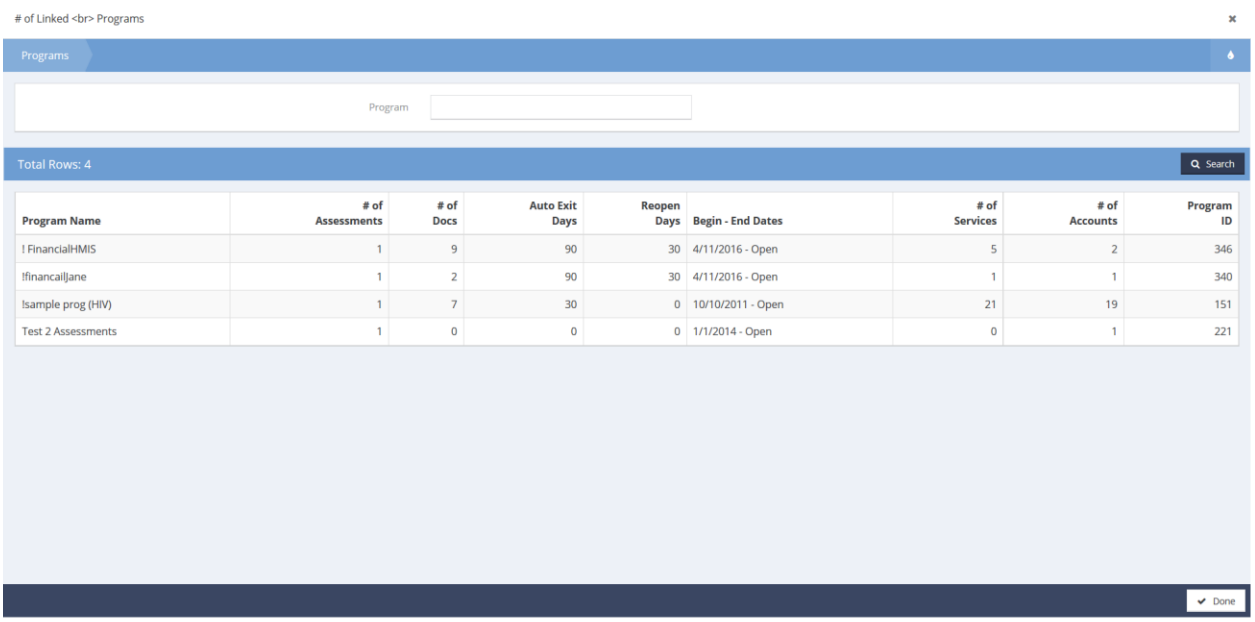

... Assessments + New Assessment

Total Rows: 98

	Form Name	Association	# of Linked Programs	Created Date	Form ID	Assess Type ID
	Add Reference Check	Client Member	0	12/23/2016 8:57:00 PM	9414	140
	Allergy Edit Form	Client Member	0	12/27/2016 5:36:00 PM	171	141
	ASR Assessment Data	Program Case	4	12/19/2014 12:54:00 PM	5926	91
	Assets and Liabilities Detail	Client Member	1	12/9/2015 11:21:00 AM	8165	103
	Assets and Liabilities Header	Client Member	2	10/17/2016 5:12:00 PM	9198	133
	Budget Financial Assessment	Client Member	1	12/9/2015 11:12:00 AM	8160	102

Select the hyperlink text in the # of Linked Programs column of data associated with the desired assessment.

The Programs form displays.

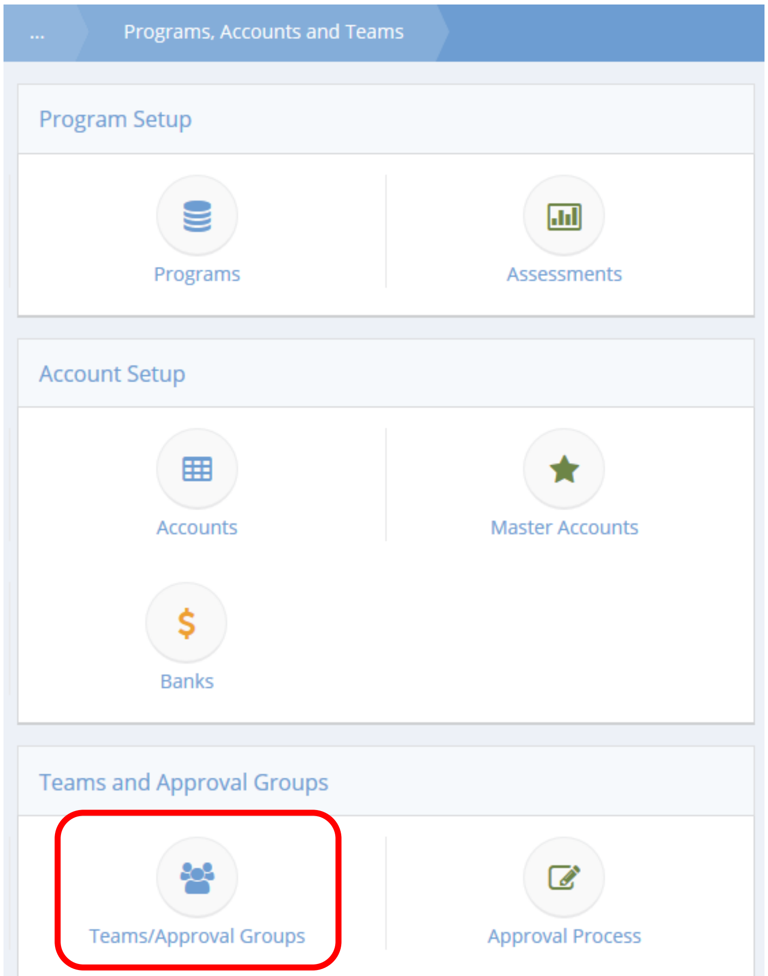


Program Name	# of Assessments	# of Docs	Auto Exit Days	Reopen Days	Begin - End Dates	# of Services	# of Accounts	Program ID
! FinancialHMIS	1	9	90	30	4/11/2016 - Open	5	2	346
!financailJane	1	2	90	30	4/11/2016 - Open	1	1	340
!sample prog (HIV)	1	7	30	0	10/10/2011 - Open	21	19	151
Test 2 Assessments	1	0	0	0	1/1/2014 - Open	0	1	221

View each program that assessment is linked to as well as information regarding each program.

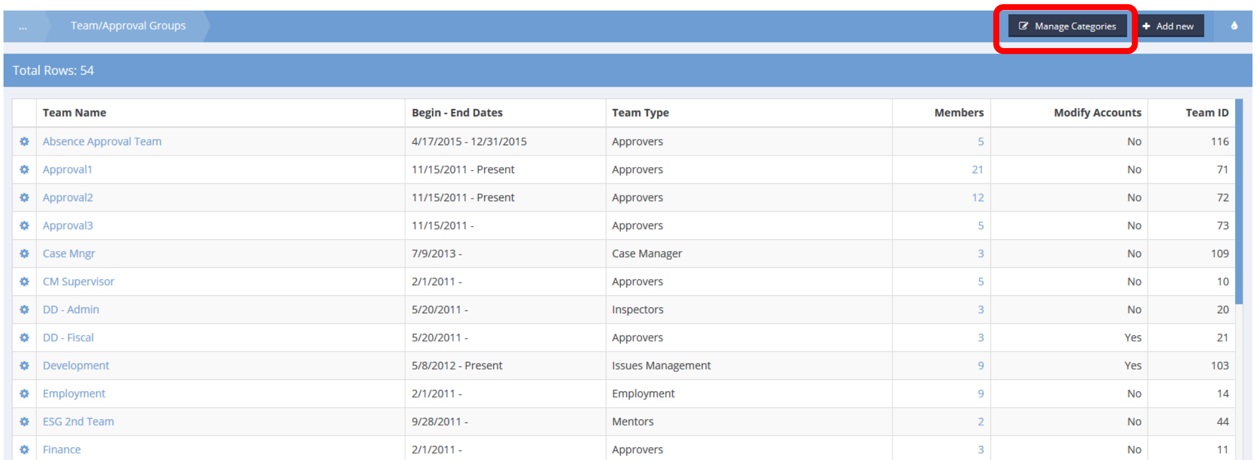
Team Categories

(Administration>Setup>Programs and Accounts)



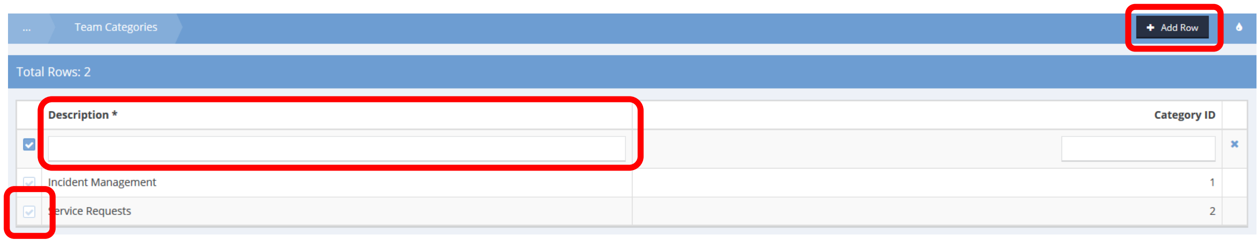
Click the icon for Teams/Approval Groups.

The Team/Approval Groups form displays



	Team Name	Begin - End Dates	Team Type	Members	Modify Accounts	Team ID
	Absence Approval Team	4/17/2015 - 12/31/2015	Approvers	5	No	116
	Approval1	11/15/2011 - Present	Approvers	21	No	71
	Approval2	11/15/2011 - Present	Approvers	12	No	72
	Approval3	11/15/2011 -	Approvers	5	No	73
	Case Mngr	7/9/2013 -	Case Manager	3	No	109
	CM Supervisor	2/1/2011 -	Approvers	5	No	10
	DD - Admin	5/20/2011 -	Inspectors	3	No	20
	DD - Fiscal	5/20/2011 -	Approvers	3	Yes	21
	Development	5/8/2012 - Present	Issues Management	9	Yes	103
	Employment	2/1/2011 -	Employment	9	No	14
	ESG 2nd Team	9/28/2011 -	Mentors	2	No	44
	Finance	2/1/2011 -	Approvers	3	No	11

To edit or create new team categories, click the Manage Categories button. The Team Categories from displays.



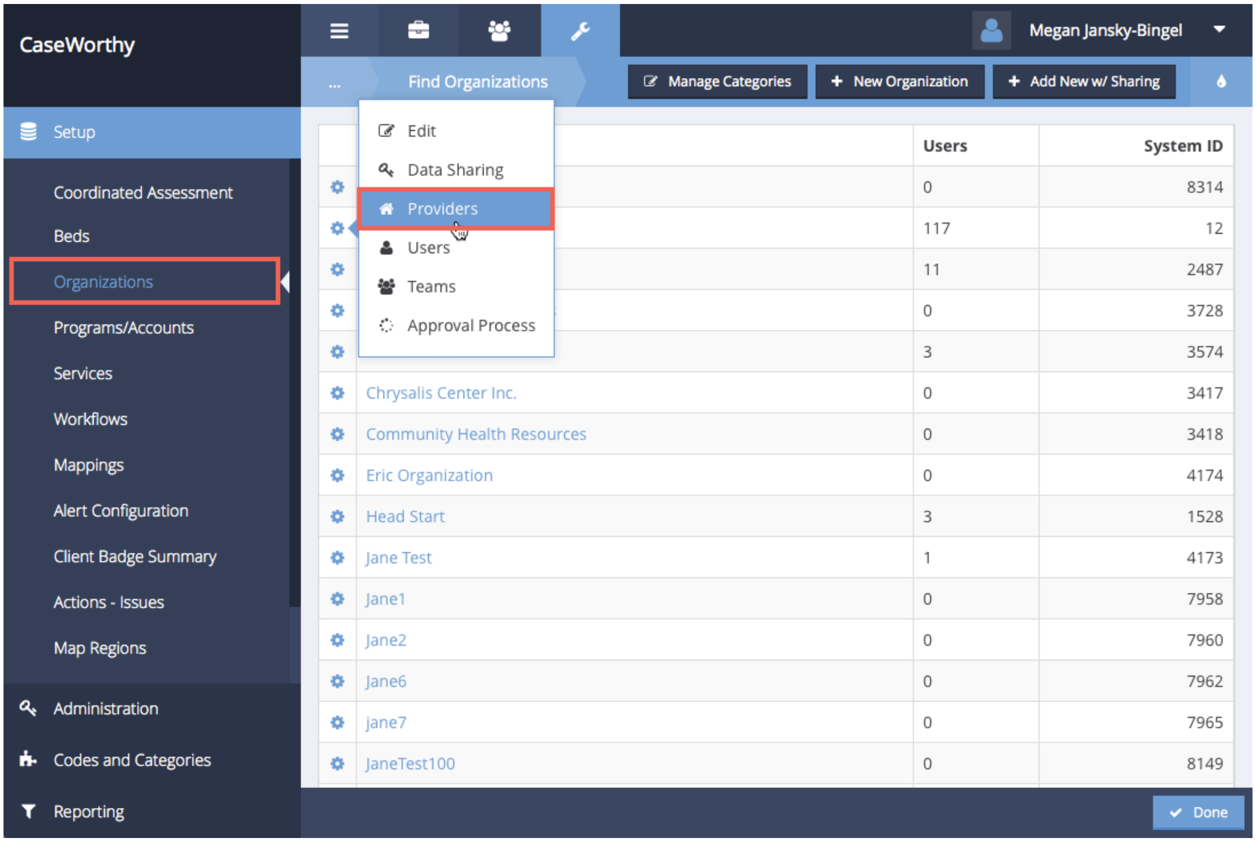
Click Add Row to create a new category or click the clear checkbox icon to edit an existing. Enter a description and click Save when finished.

Housing and Classroom Set Up

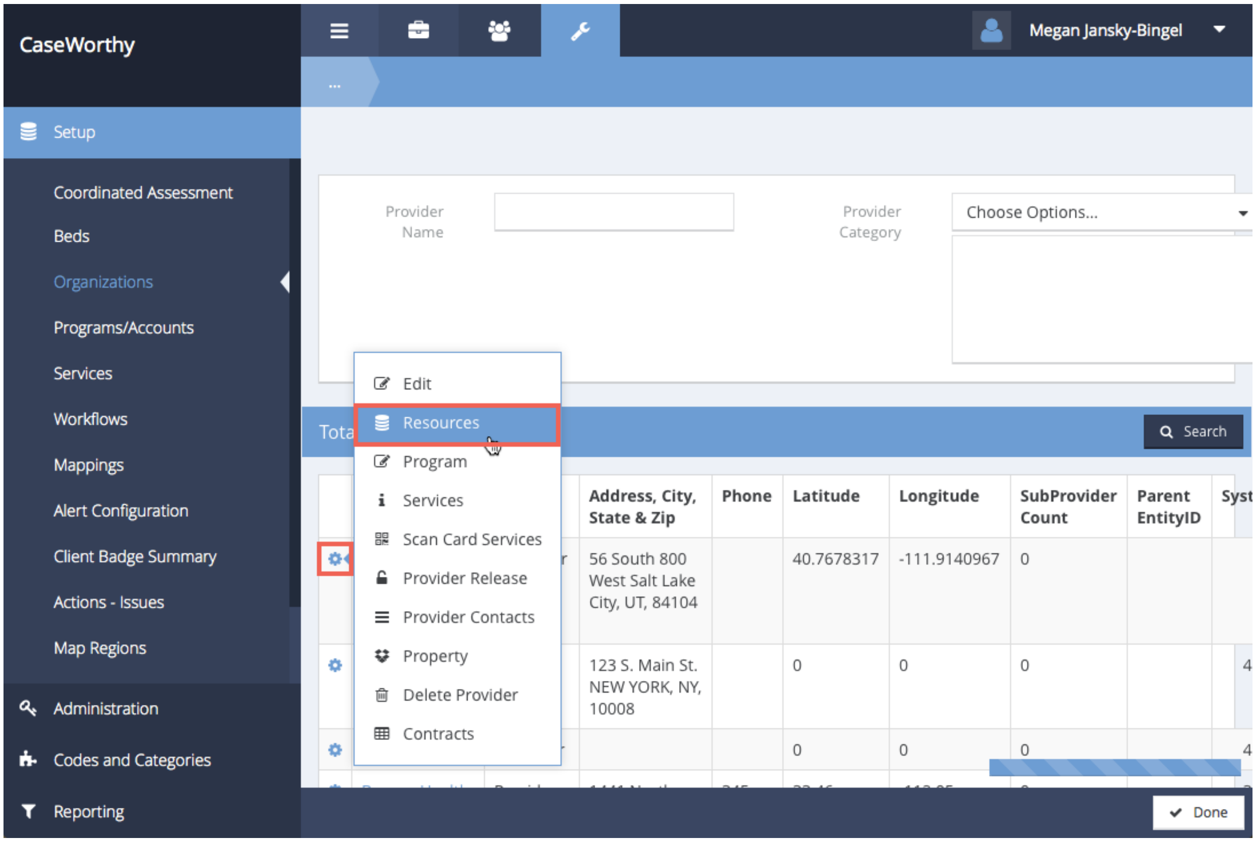
The housing and classroom functionality allows clients to be reserved, or enrolled into specific classes, shelters or other housing environments, and to have a check-in, or attendance recorded on the days they are present. The system can even automatically post a service to their record when their attendance is recorded.

Within CaseWorthy™, housing environments and classrooms are associated with providers, or physical sites. Within those sites, are resources – a defined physical space – such as a room, an apartment, a computer lab, etc. Each space may be used for different purposes at different times – the room may be used for GED class from 9-11 M-F, and for ESOL class from 1-3 on Tuesdays and Thursdays. In CaseWorthy™ these are each referred to as usages.

To set up housing or classrooms, select the “Organizations” link on the Setup menu. Navigate to the desired organization, click on the action gear and select “Providers”.



The Provider summary form displays. Choose the desired provider (physical site), click on the action gear , and select “Resources”.

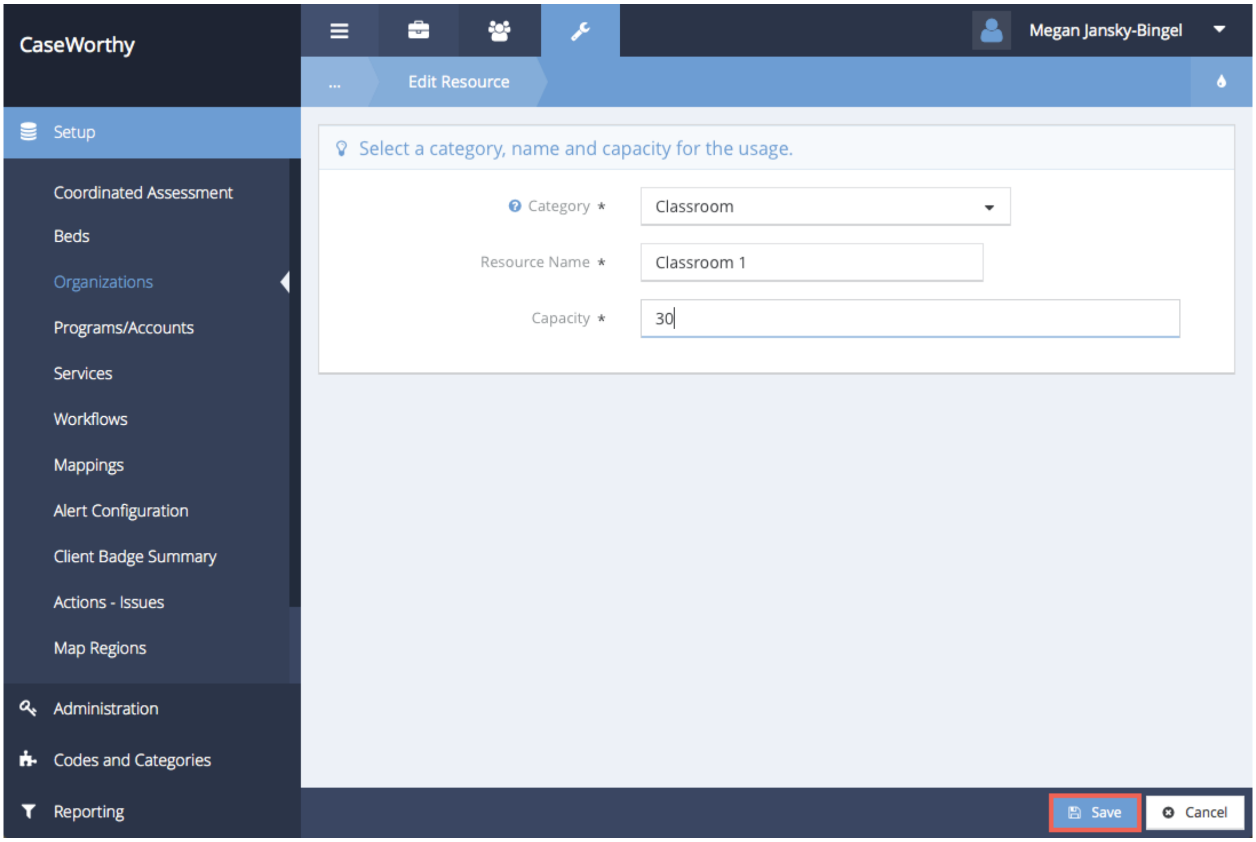


Resources

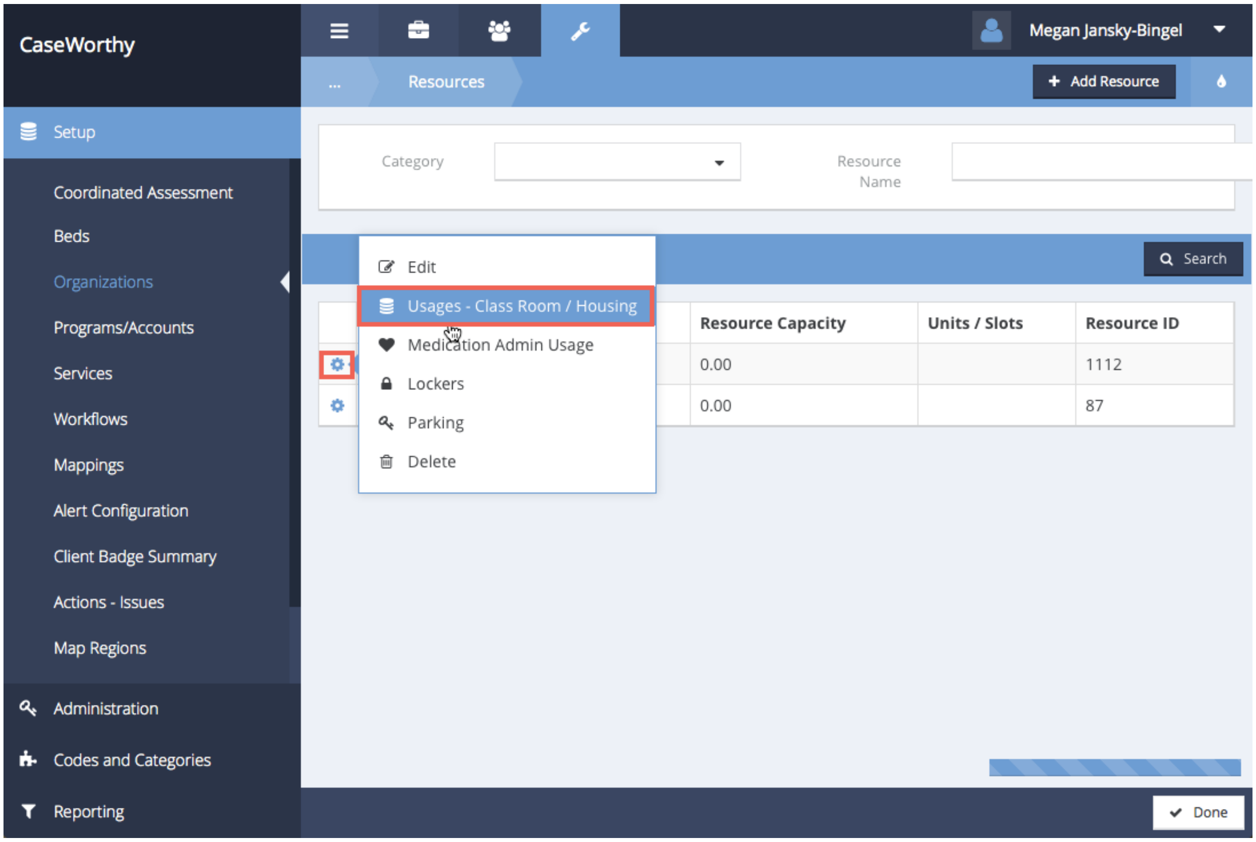
(Administration>Setup>Organizations>Providers>Resources)

To create a new resource, click the **+ Add Resource** button on the top right side of the form.

Use the drop-down list to designate whether this is a classroom or housing resource. Enter the resource name as well as the total capacity for the space. Click the **Save** button on the bottom right when done.



The Resource summary form returns. To add a usage for the resource, click on the action gear next to its name and select "usages".

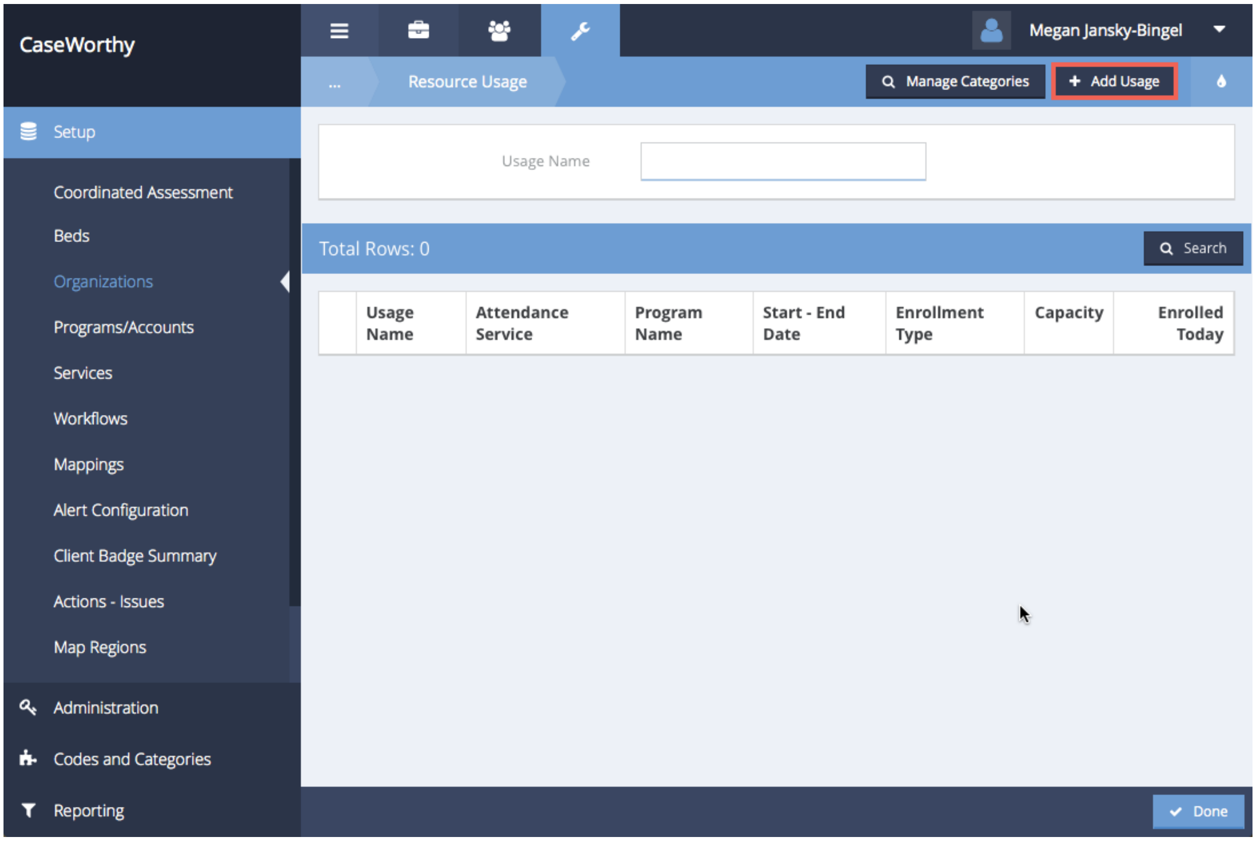


Note: ***Resources set up with category "Resource" need a usage that is configured as "PrimaryUsage" to work with the reservation form that exists with a calendar.***

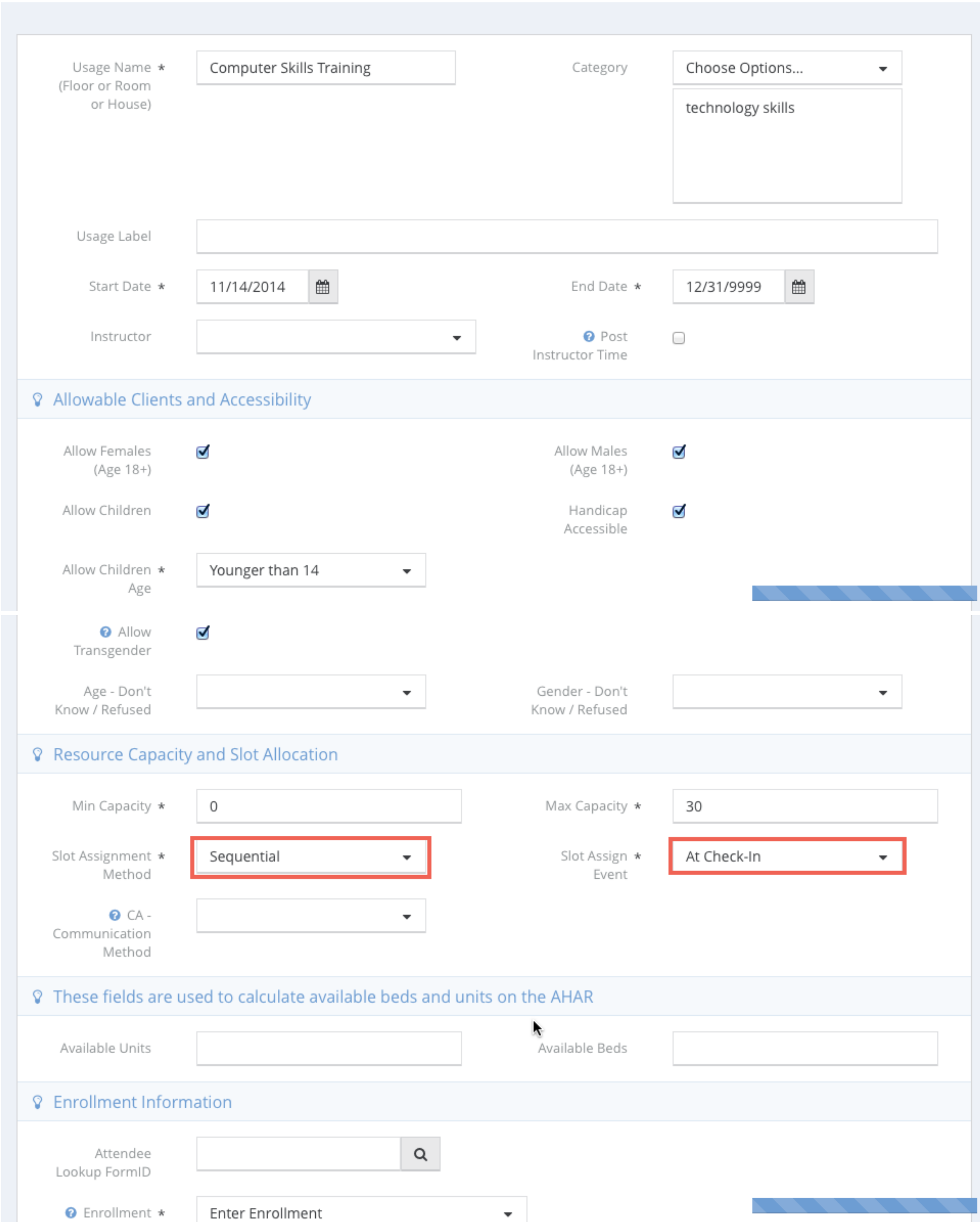
Usages

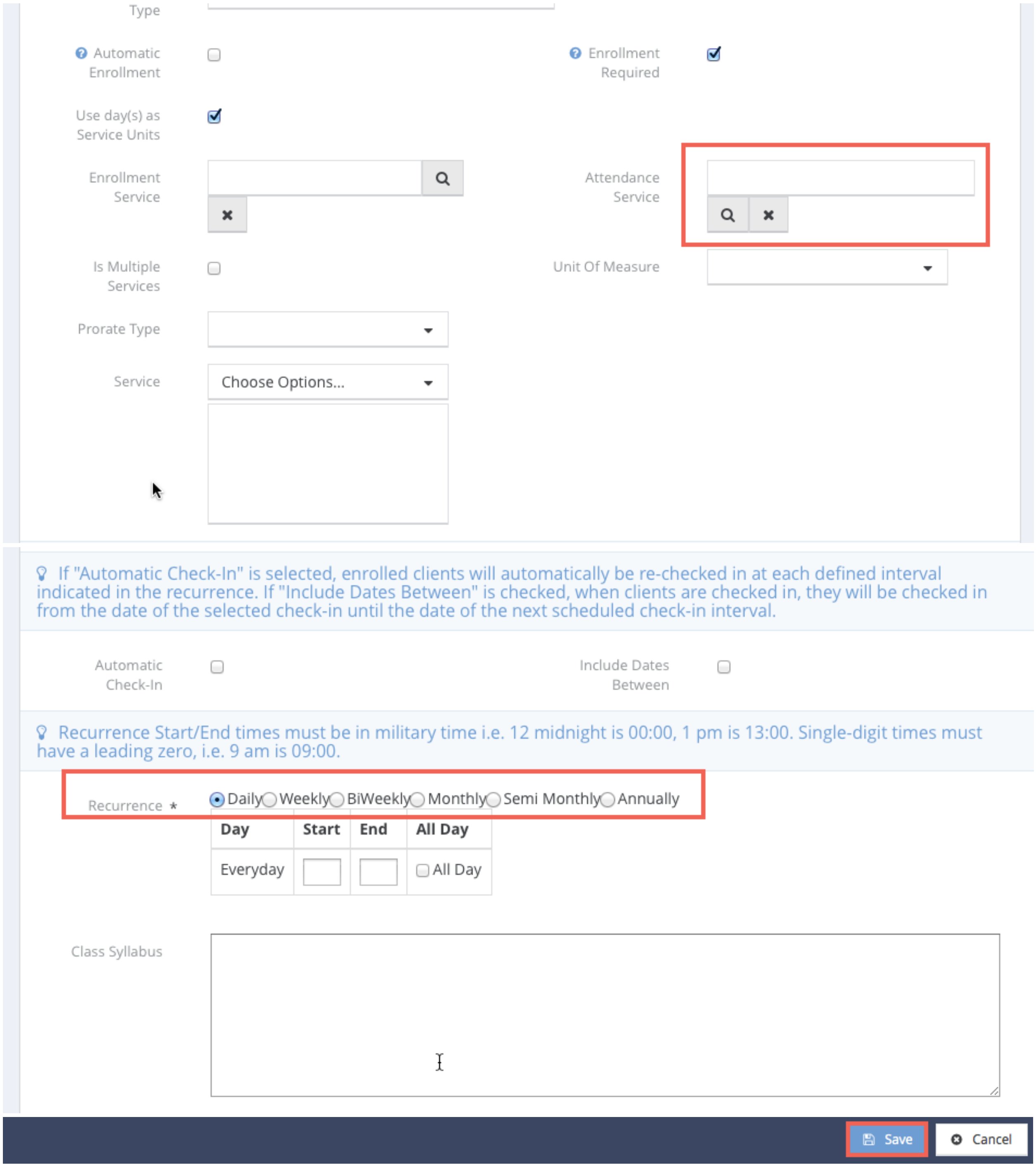
(Administration>Setup>Organizations>Providers>Resources>Usages)

The Usages summary form displays. To create a new usage, click the + Add Usage button on the top right of the form.

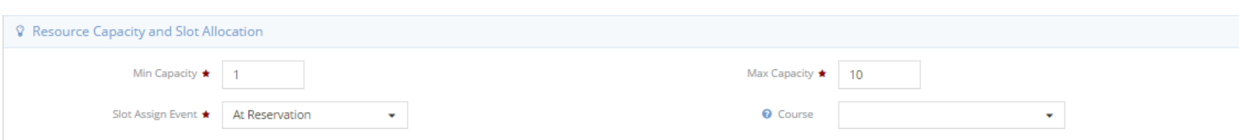


Enter all relevant and required information. If children are allowed, use the “Allow Children Age” field to select the allowed age range. Indicate whether slots should be assigned sequentially by the system. Slots (beds, computers, desks, space) can be assigned to the client at the time the reservation is made, or at the time they show up. Use the Attendance Service look up to choose the service to be posted each time the client attends or is checked in. To post a service at the time the client is reserved for the class or housing usage, use the Enrollment Service look-up form. From the look-up form, simply click on the desired service. Enter the usage recurrence. The recurrence identifies the timeframe for when a client should be checked in. For classes, it is each day/time the class is available. In housing, it is typically daily for shelters and monthly for supported housing. Enter the recurrence and begin and end times – be sure to use “military” time. Only housing usages should have “All Day” set. When all desired data has been entered click Save on the bottom right side of the form.

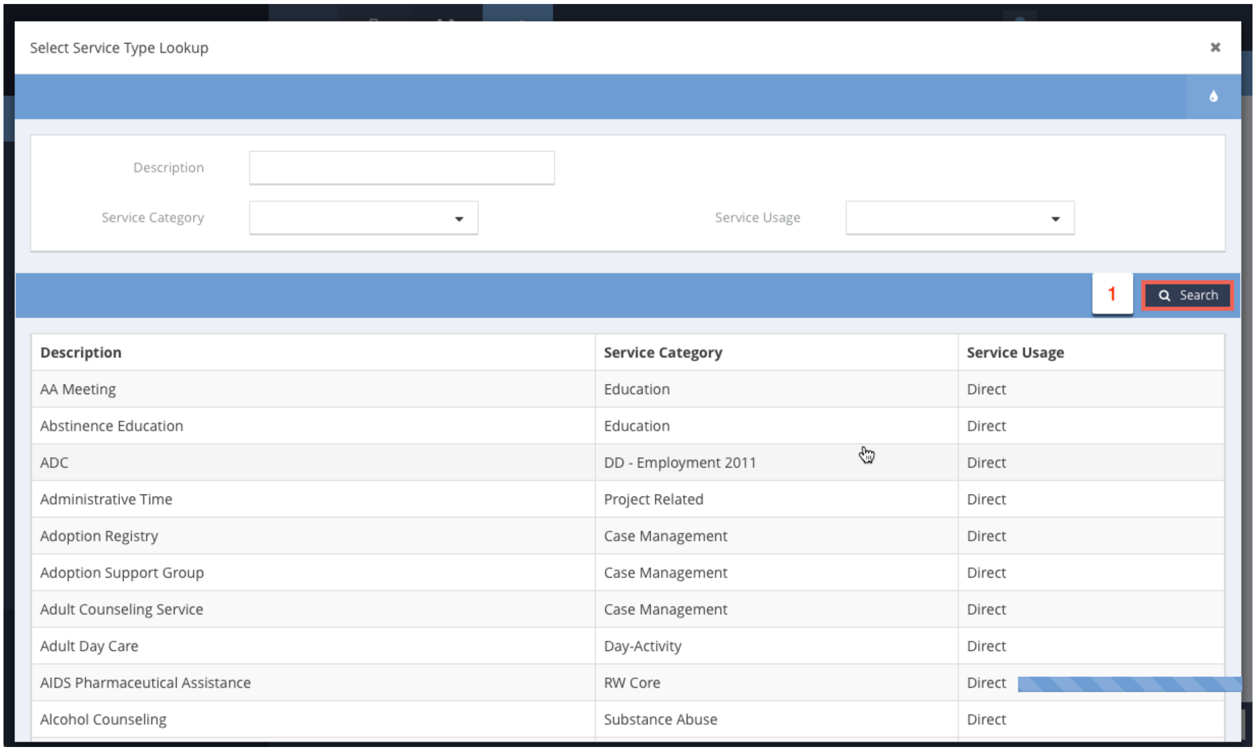

Usage Name (Floor or Room or House) *
Computer Skills Training
Category
Choose Options...
technology skills
Usage Label
Start Date *
11/14/2014
End Date *
12/31/9999
Instructor
Post Instructor Time
Allowable Clients and Accessibility
Allow Females (Age 18+)
Allow Males (Age 18+)
Allow Children
Handicap Accessible
Allow Children Age *
Younger than 14
Allow Transgender
Age - Don't Know / Refused
Gender - Don't Know / Refused
Resource Capacity and Slot Allocation
Min Capacity *
0
Max Capacity *
30
Slot Assignment Method *
Sequential
Slot Assign Event *
At Check-In
CA - Communication Method
These fields are used to calculate available beds and units on the AHAR
Available Units
Available Beds
Enrollment Information
Attendee Lookup FormID
Enrollment *
Enter Enrollment



NOTE: When the usage type is Classroom, a new field, Course, has been added in the Resource Capacity and Slot Allocation section to indicate which course is being taught in the classroom at the indicated time set up for the usage.



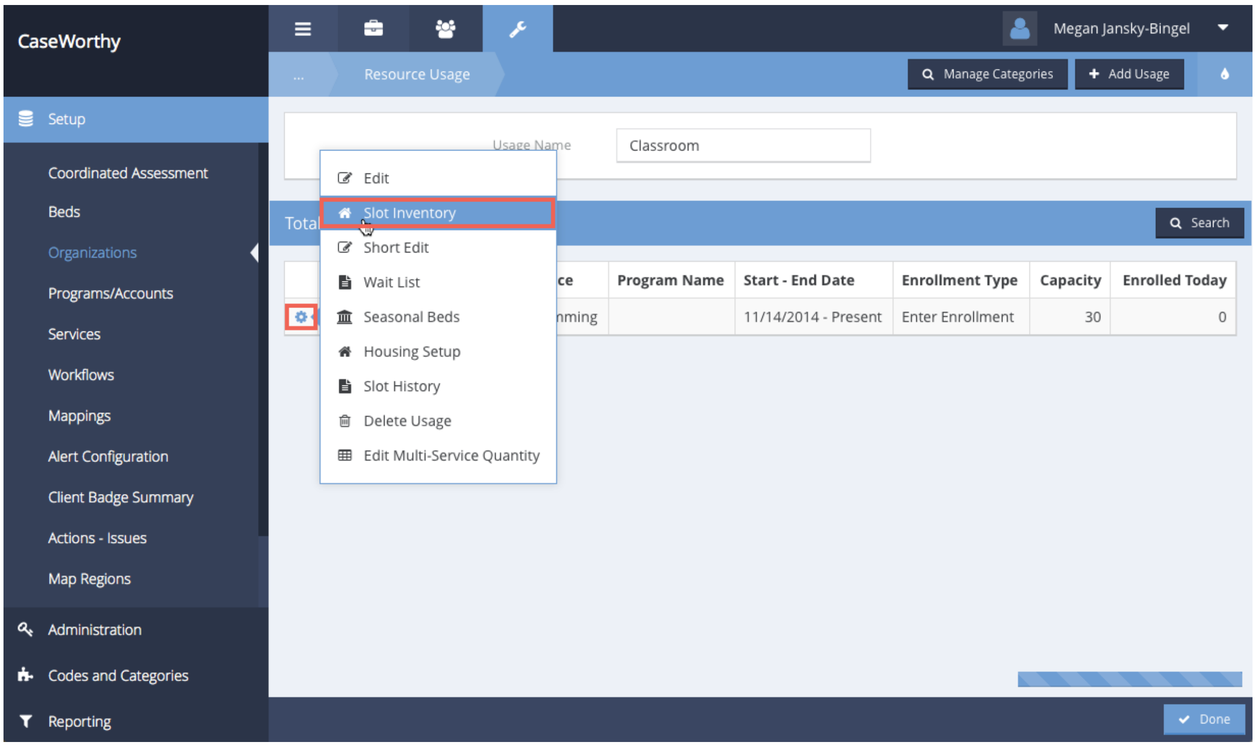
Enrollment/Attendance Service Look-Up



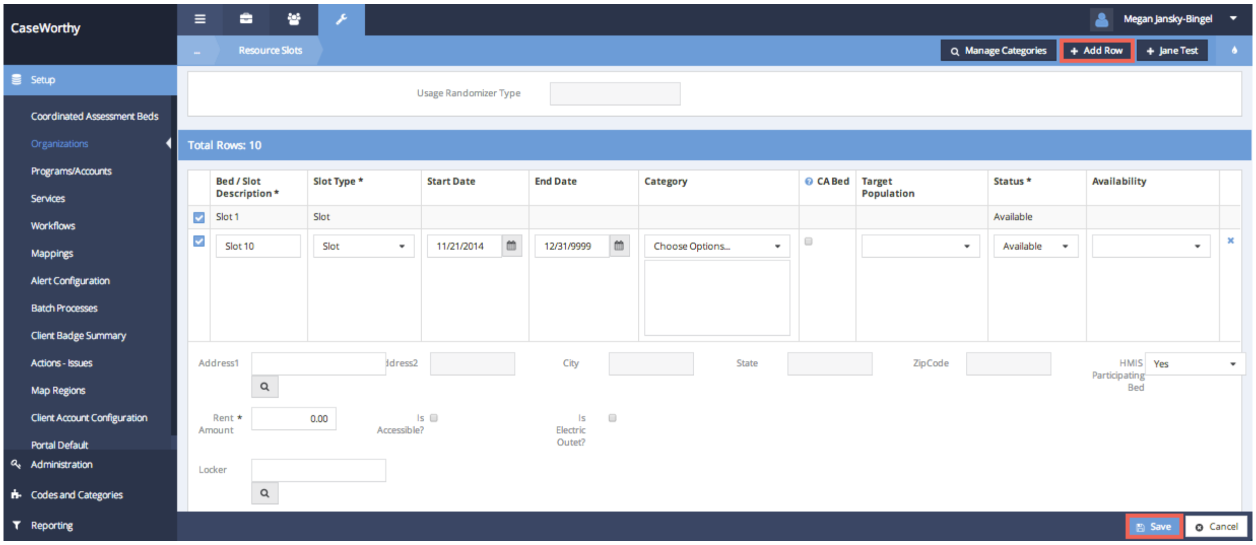
Slot Inventory

(Administration>Setup>Organizations>Providers>Resources>Slot Inventory)

Whether it is a computer, bed, bedroom, apartment, desk or spot in class, there are only so many slots available in resource usages. To assign slots and track availability, slots need to be set up within the system. From the Resource Usage summary form, find the desired usage, click on the action gear and select “Slot Inventory”.



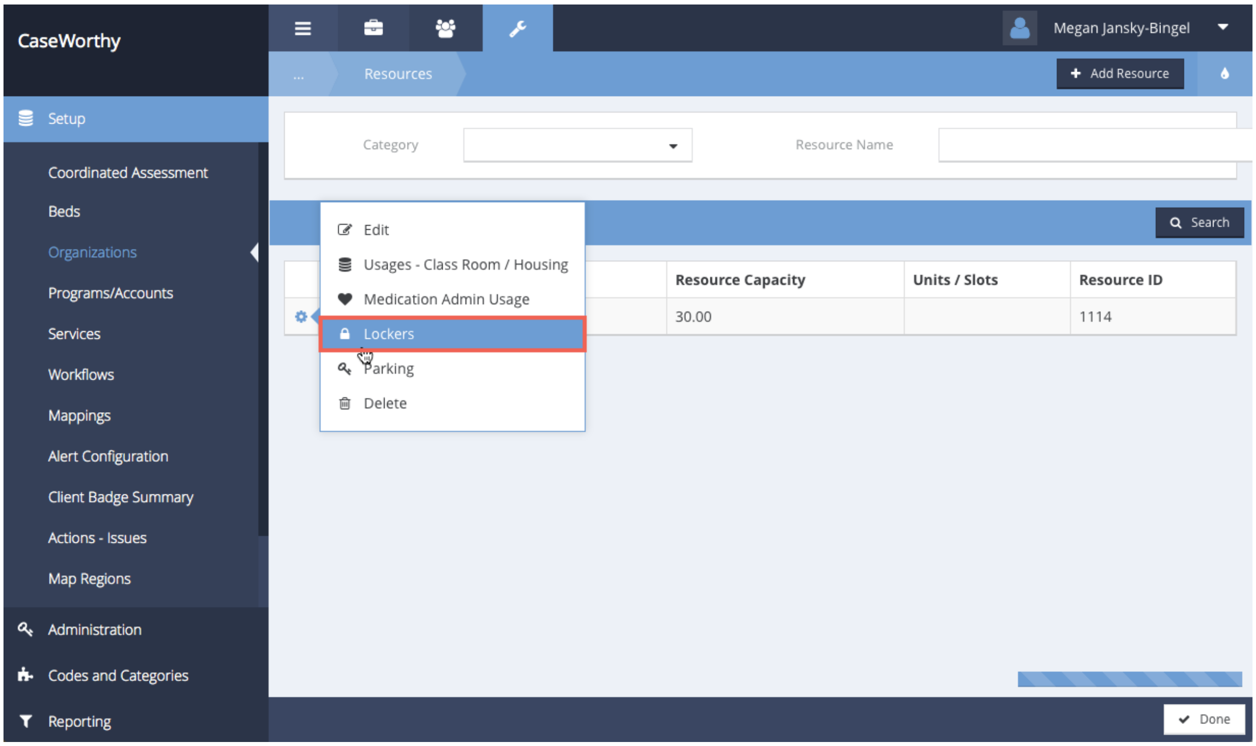
On the Resource Slots setup form, click the **+ Add Row** button on the top right, creating the total number of rows necessary to enter all slots available for the usage. Indicate if any slots are reserved for specific client types or populations (Chronic Homeless, Senior, Veteran, Disabled, etc.). Enter a name, description, or number for the slot. Use the drop-down list to identify the slot type (slot, bed, room, etc.). If a randomization process to assign slots is desired, this must be set to “Bed”. The status is defaulted to “Available” and can be edited if the slot is under repair or otherwise off-line. If using a randomization process, indicate whether the slot is intended for normal, overflow, or seasonal use. If a locker is assigned to the specific slot, it can be designated here. If the slot is linked to a Landlord Property, use the Address look up field to assign it. When all relevant and required data has been entered, click the **Save** button on the bottom right side of the form.



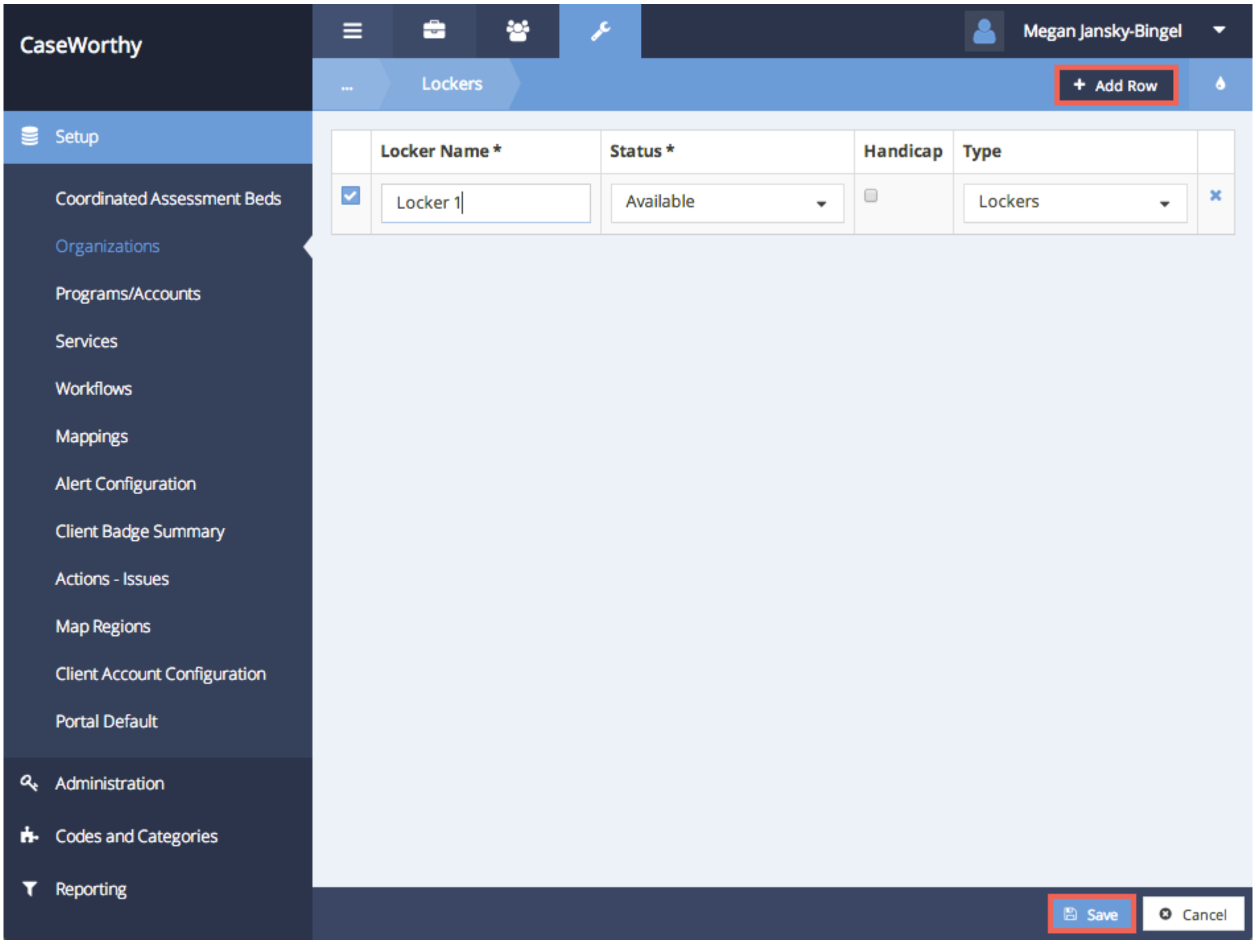
Lockers

(Administration>Setup>Organizations>Providers>Resources>Lockers)

Click on the action gear next to the desired resource and select “Lockers”.



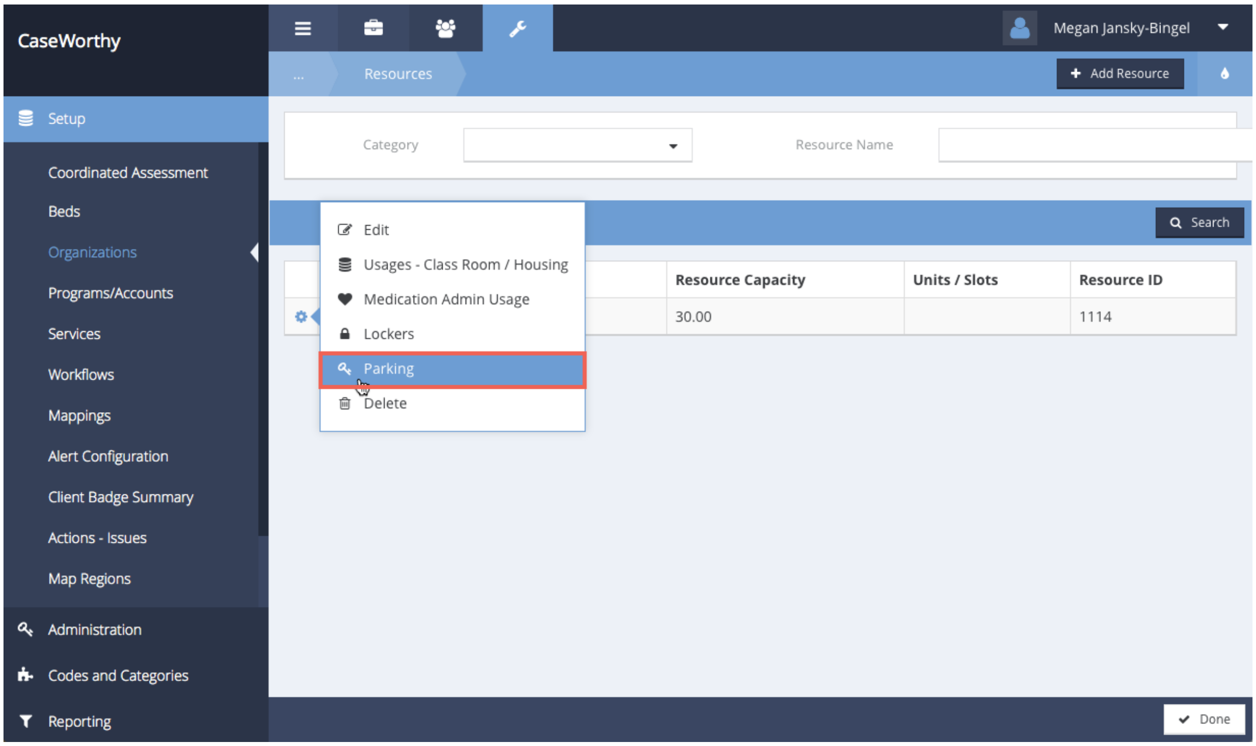
Click the + Add Row button to enter the number of rows necessary. Enter a name, description, or number for the locker. The status is defaulted to “Available” and can be edited if the locker is under repair or otherwise off-line. Use the checkbox to indicate if the locker is handicap accessible. The type defaults to “locker” and should not be changed. When all relevant and required data has been entered, click the Save button on the bottom right side of the form.


CaseWorthy
Megan Jansky-Bingel
...
Lockers
+ Add Row
Setup
Coordinated Assessment Beds
Organizations
Programs/Accounts
Services
Workflows
Mappings
Alert Configuration
Client Badge Summary
Actions - Issues
Map Regions
Client Account Configuration
Portal Default
Administration
Codes and Categories
Reporting
Locker Name *
Status *
Handicap
Type
Locker 1
Available
Lockers
Save
Cancel

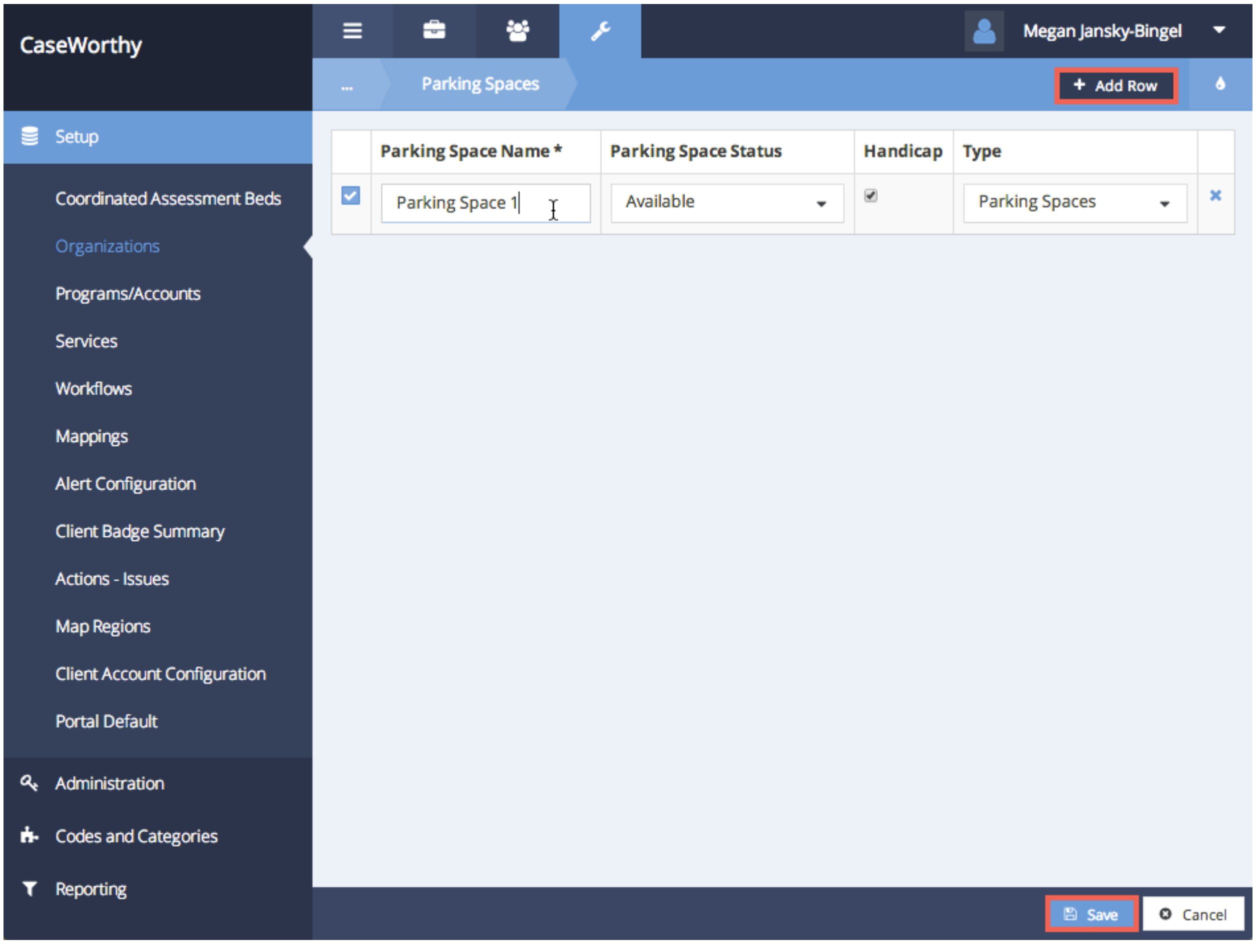
Parking

(Administration>Setup>Organizations>Providers>Resources>Parking)

Click on the action gear next to the desired resource and select "Parking".

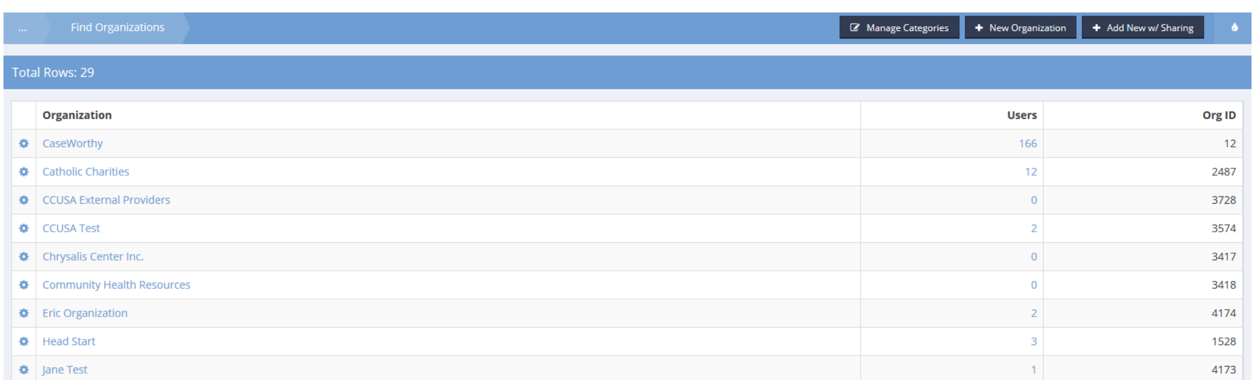


Click the Add Row button to enter the number of rows necessary. Enter a name, description, or number for the parking space. The status is defaulted to "Available" and can be edited if the parking space is under repair or otherwise unavailable. Use the checkbox to indicate if the space is handicap accessible. When all relevant and required data has been entered, click the Save button on the bottom right side of the form.

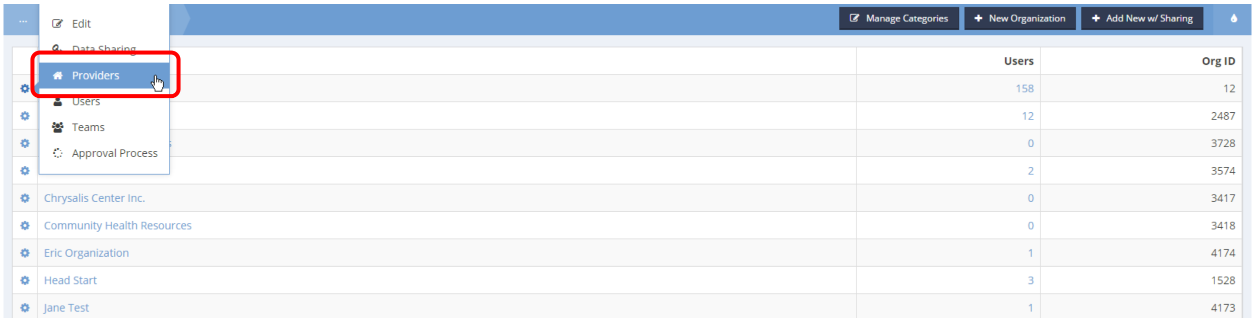


Edit Resource Slot Category Type

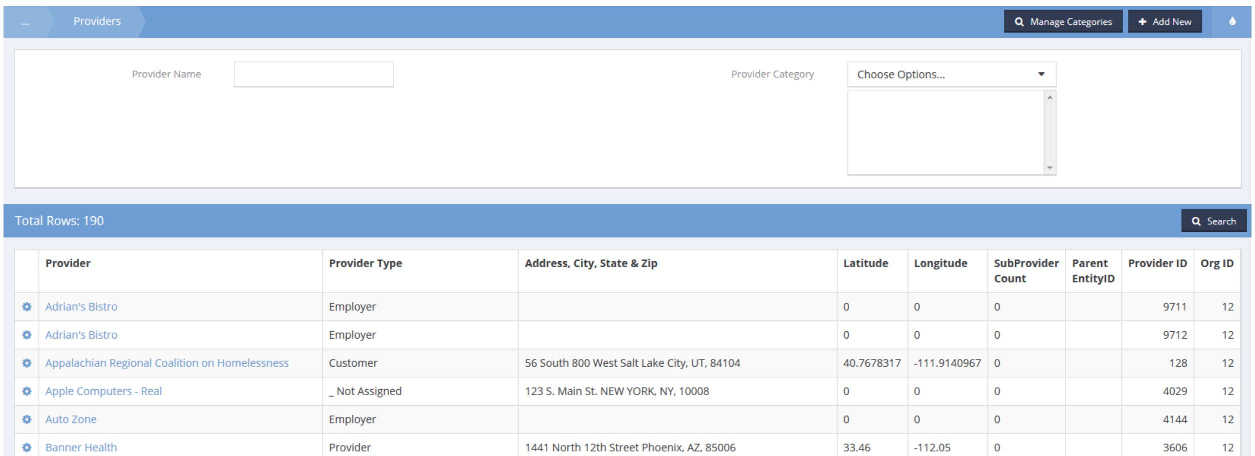
(Administration>Setup>Organizations)



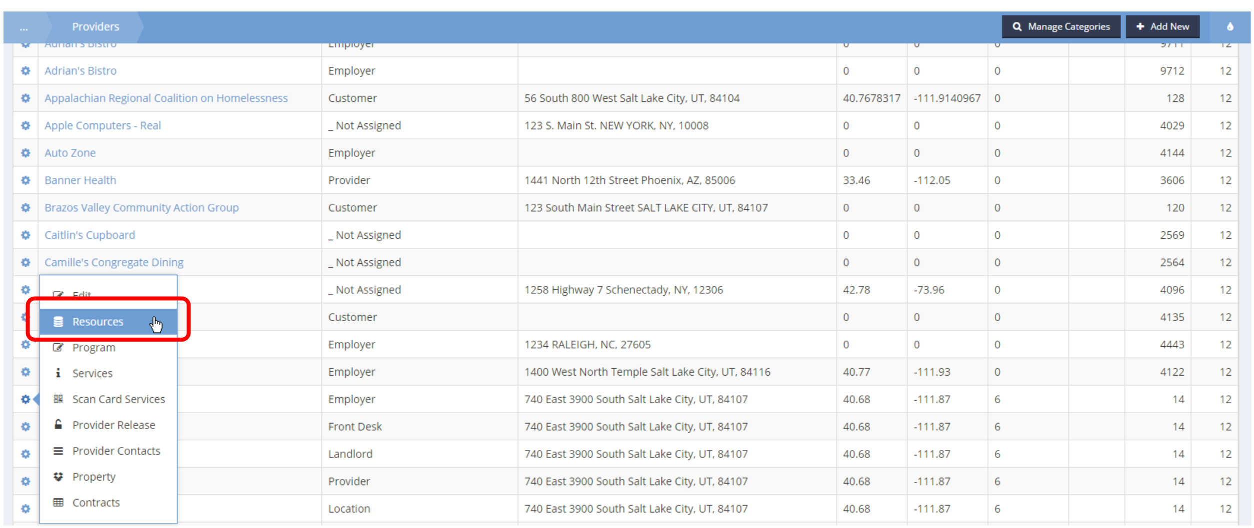
On the Find Organizations form, click the action gear icon associated with the desired organization and select Providers from the pop up menu that appears.



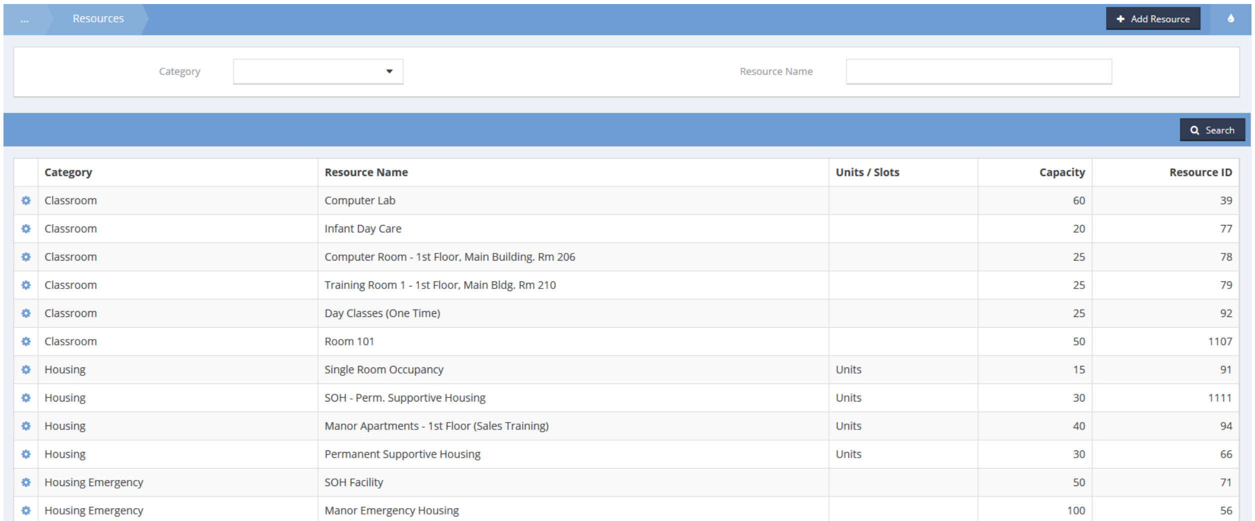
The Providers form displays.



Click the action gear icon associated with the desired provider and select Resources from the pop up menu that appears.



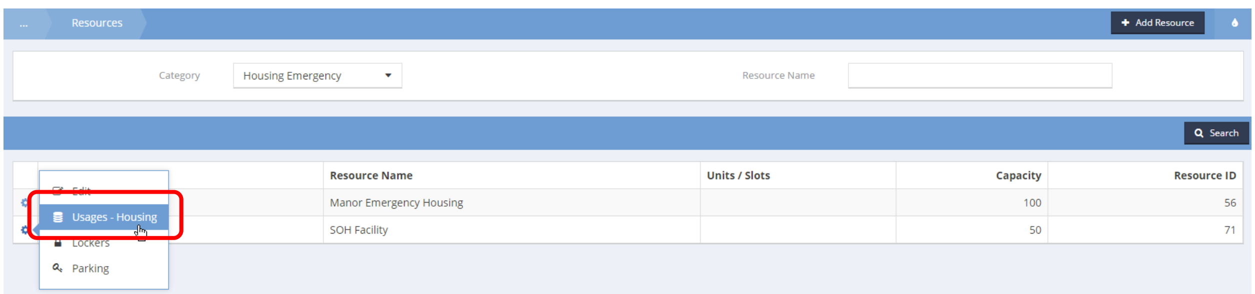
The Resources form displays.



	Category	Resource Name	Units / Slots	Capacity	Resource ID
	Classroom	Computer Lab		60	39
	Classroom	Infant Day Care		20	77
	Classroom	Computer Room - 1st Floor, Main Building, Rm 206		25	78
	Classroom	Training Room 1 - 1st Floor, Main Bldg, Rm 210		25	79
	Classroom	Day Classes (One Time)		25	92
	Classroom	Room 101		50	1107
	Housing	Single Room Occupancy	Units	15	91
	Housing	SOH - Perm. Supportive Housing	Units	30	1111
	Housing	Manor Apartments - 1st Floor (Sales Training)	Units	40	94
	Housing	Permanent Supportive Housing	Units	30	66
	Housing Emergency	SOH Facility		50	71
	Housing Emergency	Manor Emergency Housing		100	56

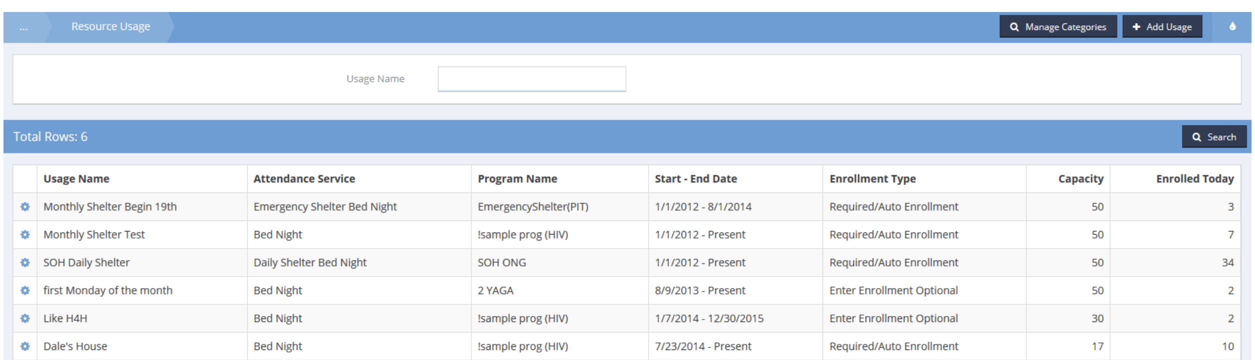
From the Category drop down box in the form header, select Housing Emergency.

The list filters. Click the action gear icon associated with the desired resource and select Usages – Housing from the pop up menu that appears.



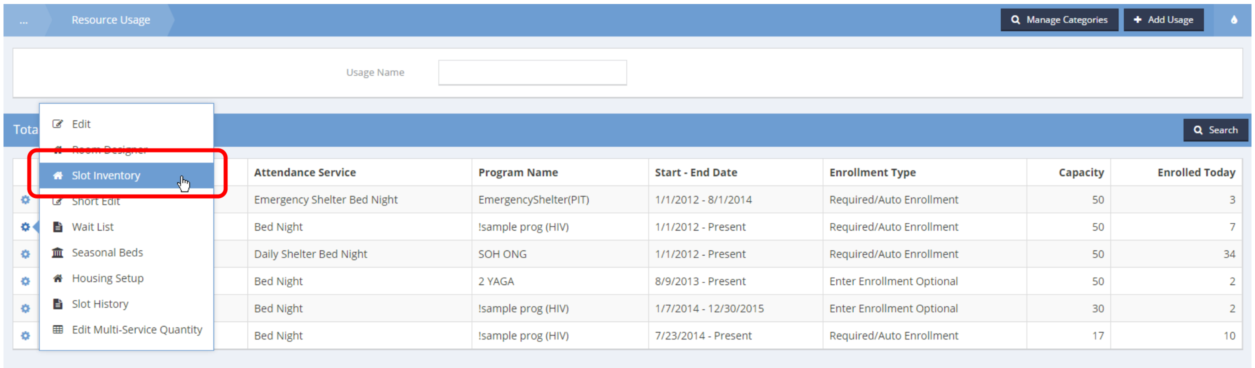
Resource Name	Units / Slots	Capacity	Resource ID
Manor Emergency Housing		100	56
SOH Facility		50	71

The Resource Usage form displays.

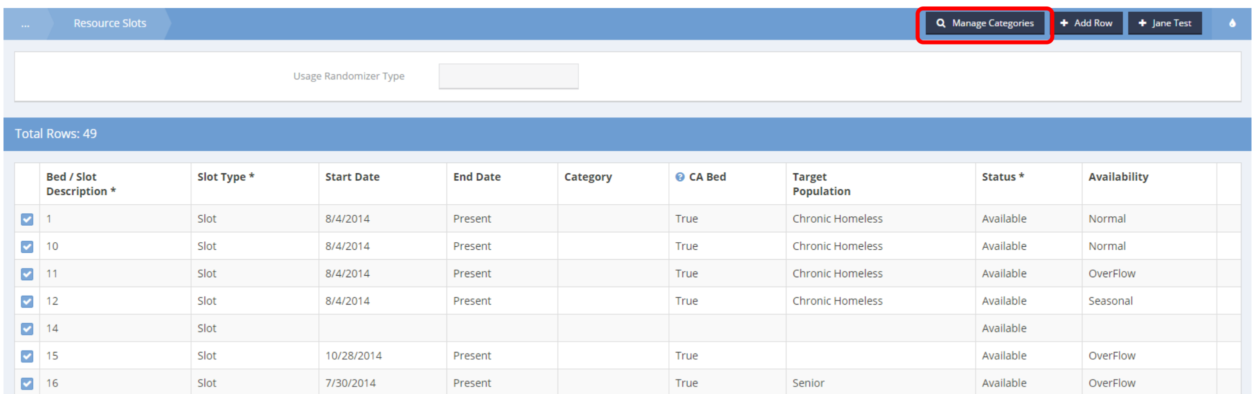


	Usage Name	Attendance Service	Program Name	Start - End Date	Enrollment Type	Capacity	Enrolled Today
	Monthly Shelter Begin 19th	Emergency Shelter Bed Night	EmergencyShelter(PIT)	1/1/2012 - 8/1/2014	Required/Auto Enrollment	50	3
	Monthly Shelter Test	Bed Night	!sample prog (HIV)	1/1/2012 - Present	Required/Auto Enrollment	50	7
	SOH Daily Shelter	Daily Shelter Bed Night	SOH ONG	1/1/2012 - Present	Required/Auto Enrollment	50	34
	first Monday of the month	Bed Night	2 YAGA	8/9/2013 - Present	Enter Enrollment Optional	50	2
	Like H4H	Bed Night	!sample prog (HIV)	1/7/2014 - 12/30/2015	Enter Enrollment Optional	30	2
	Dale's House	Bed Night	!sample prog (HIV)	7/23/2014 - Present	Required/Auto Enrollment	17	10

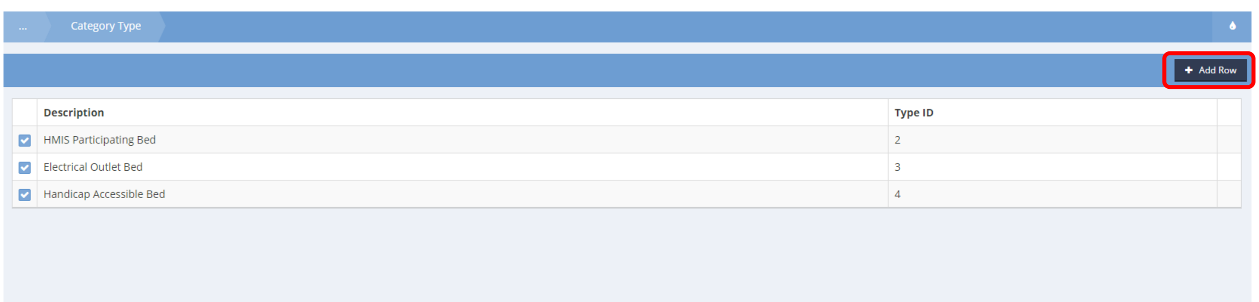
Click the action gear icon associated with the desired resource usage and select Slot Inventory from the pop up menu that appears.



The Resource Slots form displays.



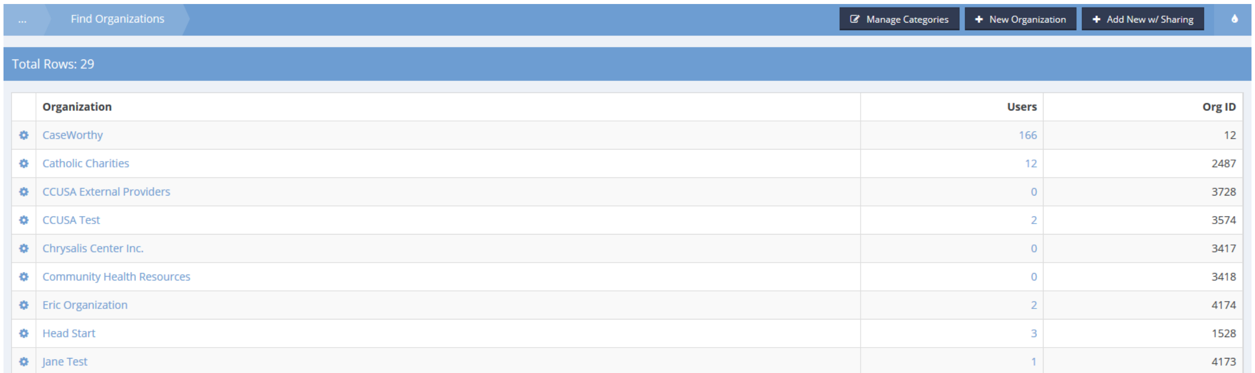
Click Manage Categories. The Category Type form displays.



Click Add Row to add a new type or click the blue checkbox to edit an existing type. A new, expanded row appears, or the existing row expands for editing. Click Save when finished editing.

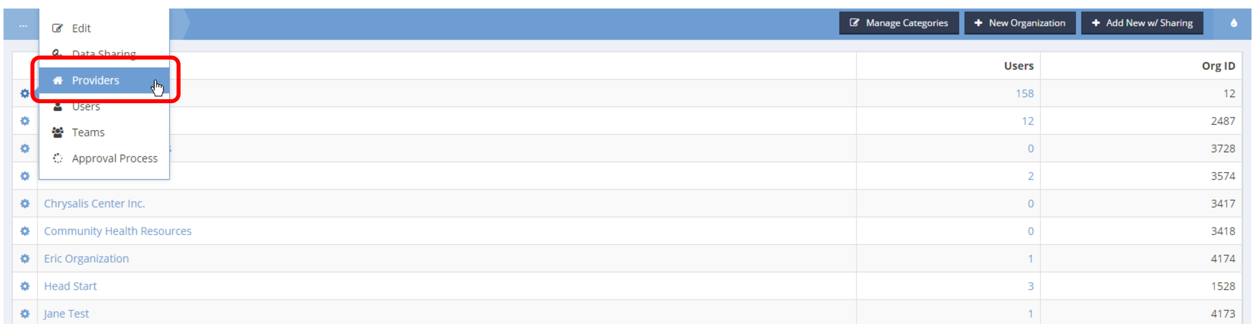
Add In/Out Resource Usage Event

(Administration>Setup>Organizations)



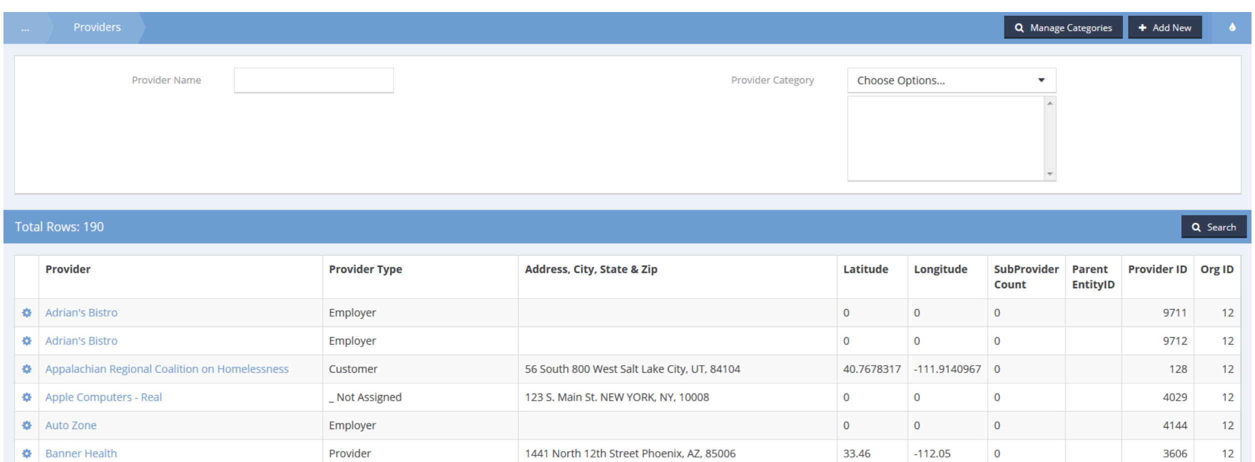
Organization	Users	Org ID
CaseWorthy	166	12
Catholic Charities	12	2487
CCUSA External Providers	0	3728
CCUSA Test	2	3574
Chrysalis Center Inc.	0	3417
Community Health Resources	0	3418
Eric Organization	2	4174
Head Start	3	1528
Jane Test	1	4173

On the Find Organizations form, click the action gear icon associated with the desired organization and select Providers from the pop up menu that appears.



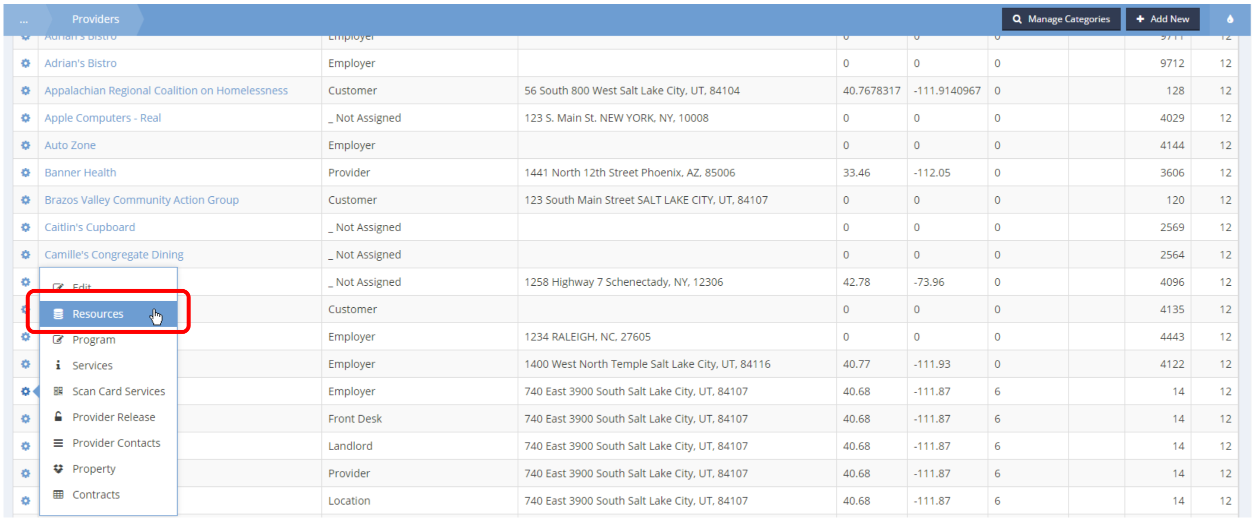
Organization	Users	Org ID
	158	12
	12	2487
	0	3728
	2	3574
Chrysalis Center Inc.	0	3417
Community Health Resources	0	3418
Eric Organization	1	4174
Head Start	3	1528
Jane Test	1	4173

The Providers form displays.

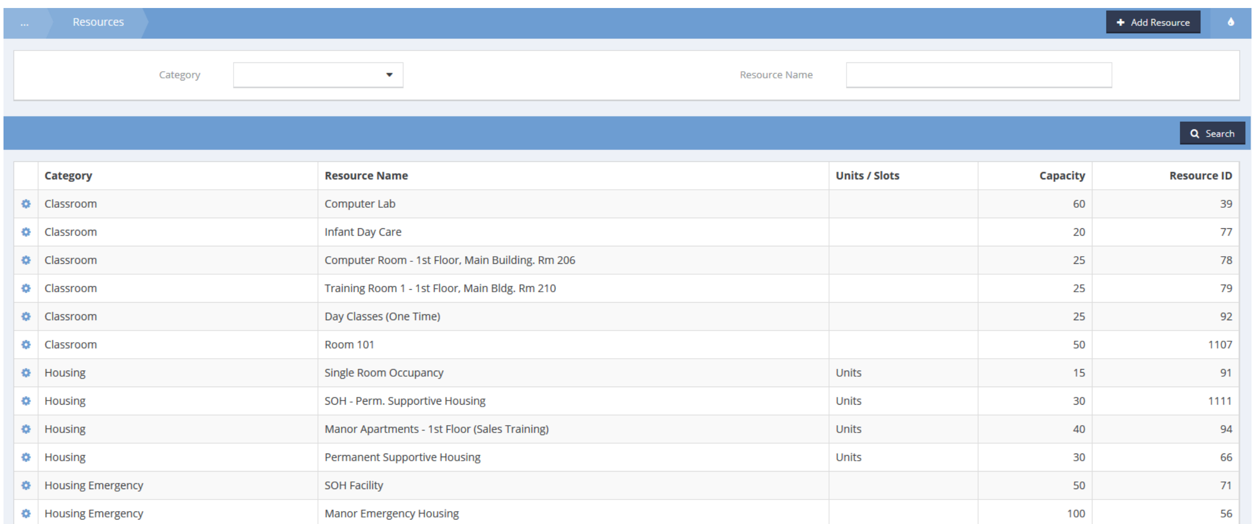


Provider	Provider Type	Address, City, State & Zip	Latitude	Longitude	SubProvider Count	Parent EntityID	Provider ID	Org ID
Adrian's Bistro	Employer		0	0	0		9711	12
Adrian's Bistro	Employer		0	0	0		9712	12
Appalachian Regional Coalition on Homelessness	Customer	56 South 800 West Salt Lake City, UT, 84104	40.7678317	-111.9140967	0		128	12
Apple Computers - Real	_ Not Assigned	123 S. Main St. NEW YORK, NY, 10008	0	0	0		4029	12
Auto Zone	Employer		0	0	0		4144	12
Banner Health	Provider	1441 North 12th Street Phoenix, AZ, 85006	33.46	-112.05	0		3606	12

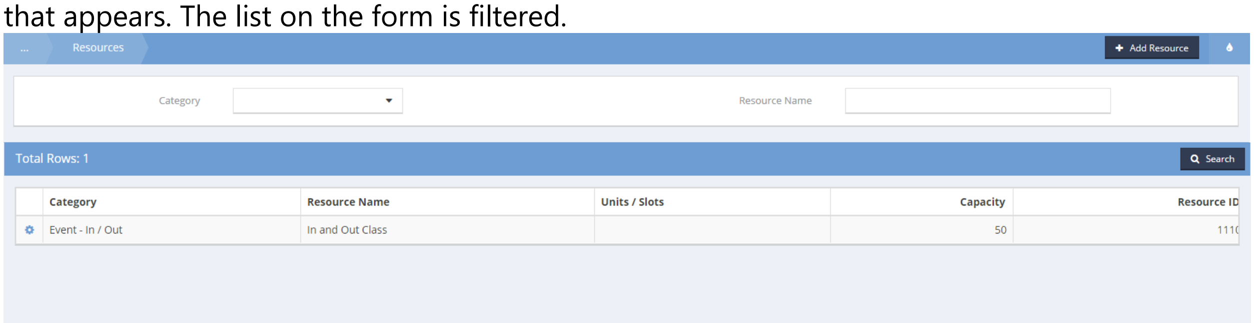
Click the action gear icon associated with the desired provider and select Resources from the pop up menu that appears.



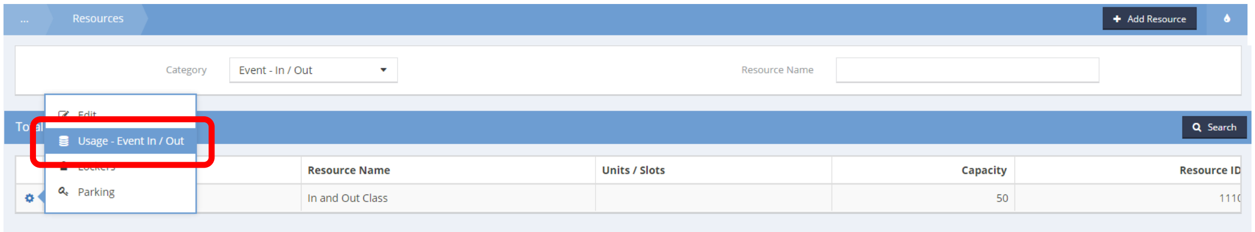
The Resources form displays.



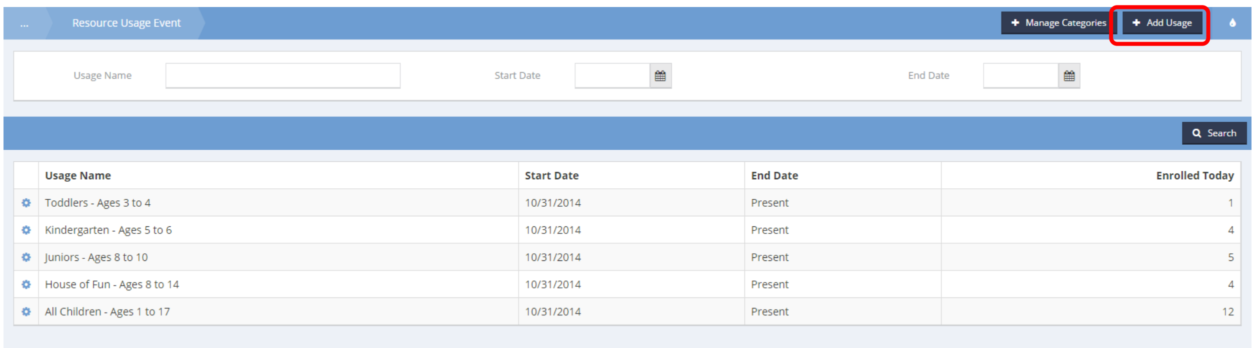
Click on the Category field in the form header and select Event In/Out from the drop down list that appears. The list on the form is filtered.



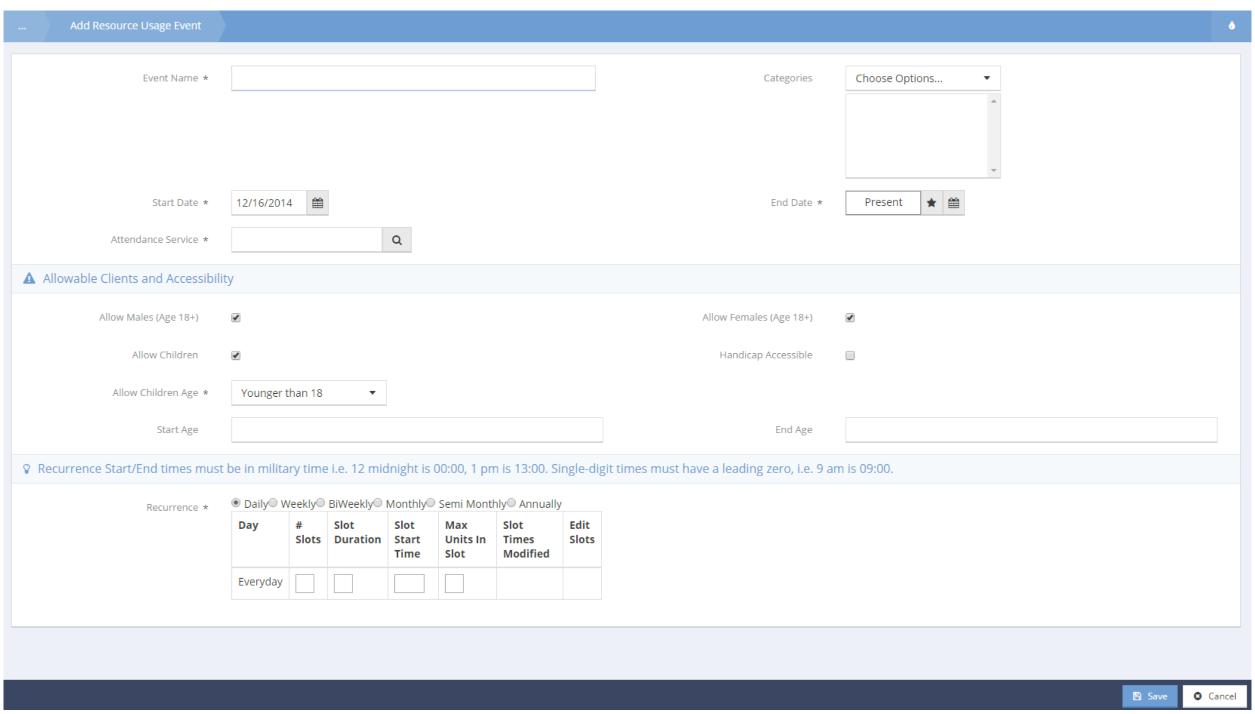
Click the action gear icon associated with the desired resource and select Usage Event In/Out from the pop up menu that appears.



The Resource Usage Event form displays. Click the **Add Usage** button.



The Add Resource Usage Event form displays.



Fill out all required fields and click on the **Save** button.

Provider Options

(Administration>Setup>Organizations>Providers)

Within CaseWorthy™, providers are defined as distinct sites. An organization may have more than one location and certain programs can be provided at multiple locations. Additionally, providers can be distinct entities that provide a service (counselor, doctor, mentor) or an organization that acts as a referral source or otherwise partners with programs.

Generally, internal providers are the physical locations associated with the organization – and are set up off the "Provider" link on that organization's action gear.

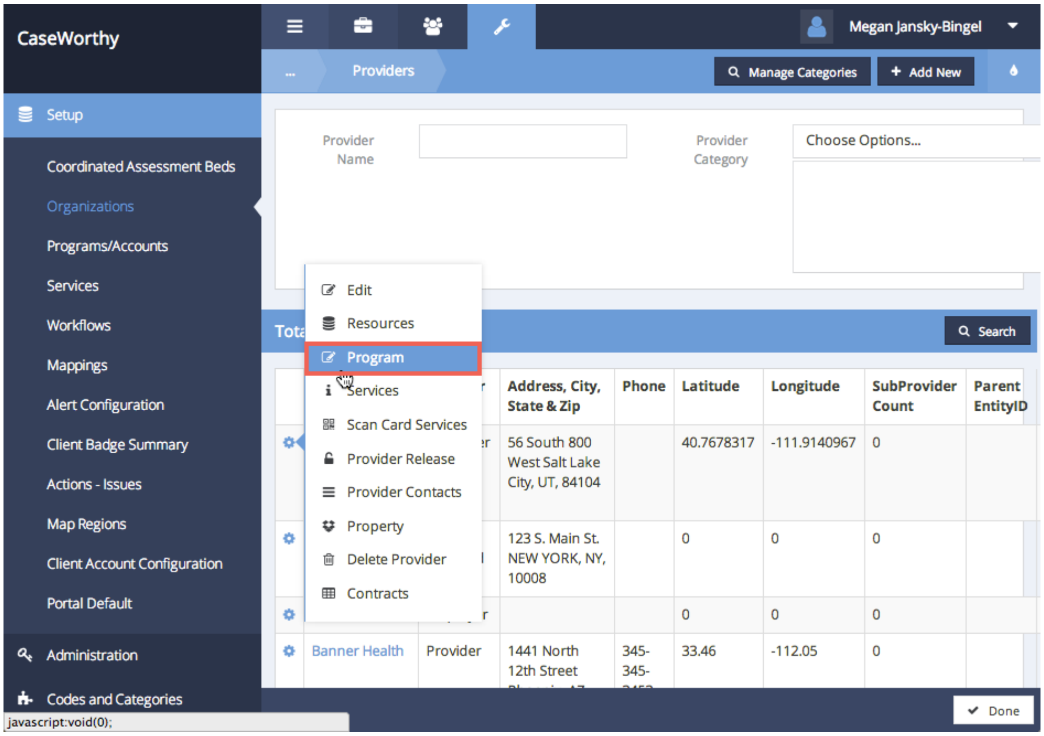
Providers that are external to the organization, and that are a referral source or individual provider are set up under a generic organization.

To set up a provider, navigate to the Provider Setup section of this manual. Once a provider has been created, it is now possible to do HMIS Setup (linking provider details to HUD reports), link programs, link referral services, and/or link landlord properties. To use the Scan Card Services or Provider Release features, please contact the appropriate CaseWorthy™ Project Manager.

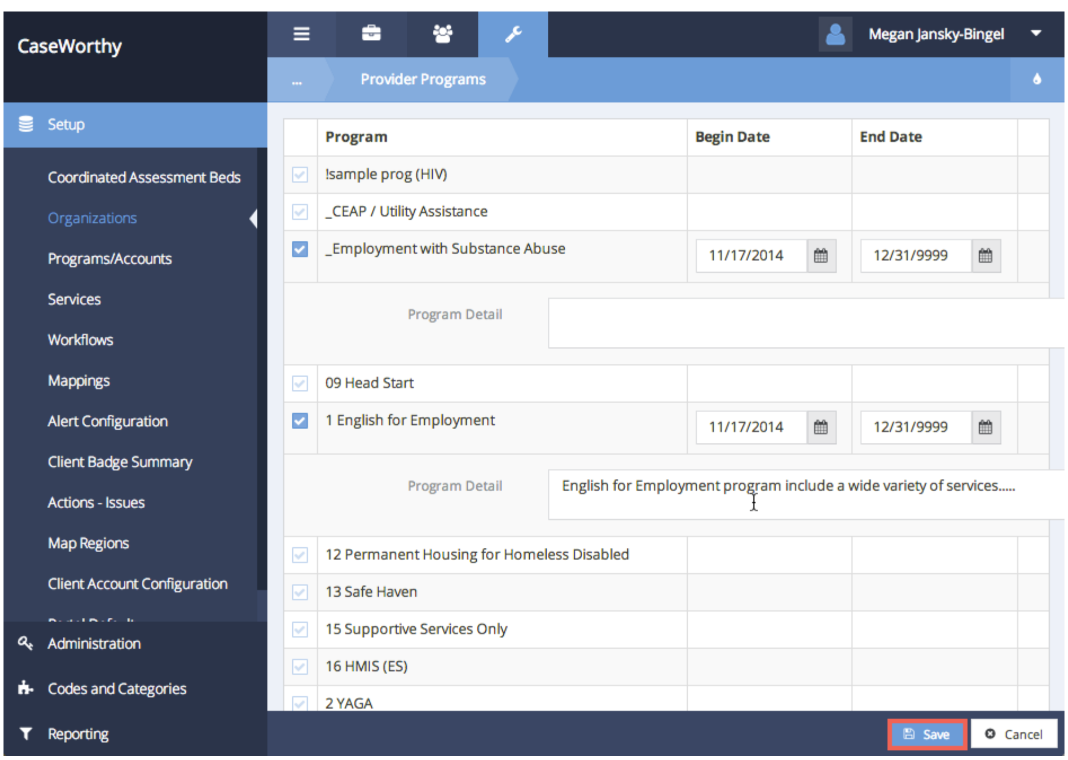
Linking Programs to Providers

(Administration>Setup>Organizations>Providers>Program)

To link programs to providers, click on the action gear next to the desired provider and select "Program". This step needs to be completed to enter Program Contacts in the system.



A list of programs associated with the parent organization displays. Click on the clear checkbox next to the program name to select it and link it to the provider. Click the Save button on the bottom right side of the form when all desired programs have been selected.



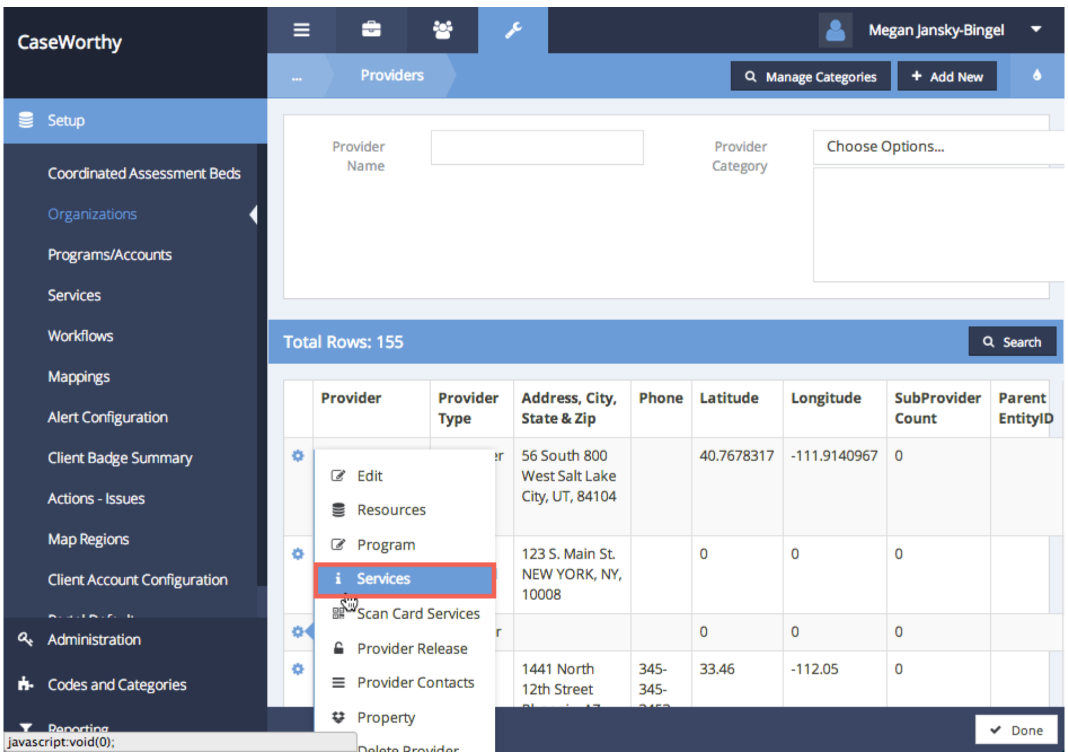
Linking Referral Services to Providers

(Administration>Setup>Organizations>Providers>Services)

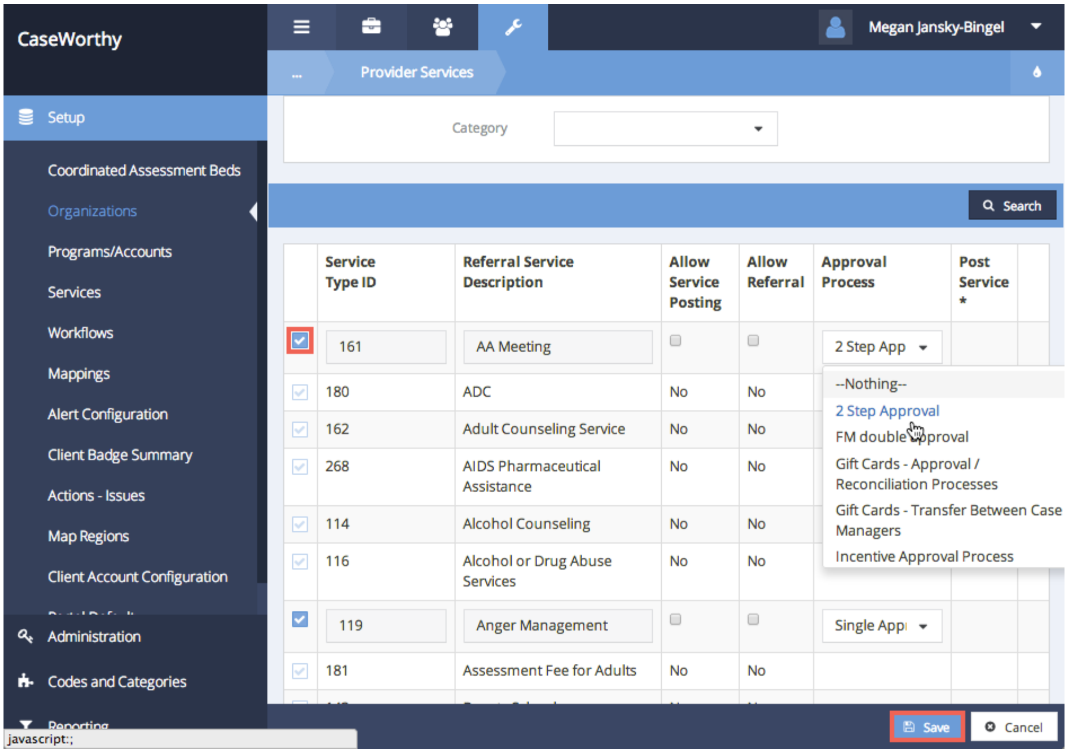
In CaseWorthy™ referrals are made to providers based on the specific service(s) a client needs. When making the referral, a user identifies a needed service and a list of individuals and/or agencies that provide that service displays. To generate that list, system administrators first need to link the services available through the various providers.

Additionally, if there are certain services which need an approval (such as utility assistance payments), these services need to be linked to the provider of the service, or vendor to whom the payment should be made.

From the Provider summary form, click on the action gear next to the desired provider and select "Services".



The list of all services entered into the system appears. Click on the clear button next to the service description(s) to be linked to the provider. Click the check box for "Allow Service Posting" to post an approved request or referred service to the client record. To identify the service that should post to the client record, use the "Post Service" look up. To make this service available on the referral options list, click the "Allow Referral" checkbox. If an approval is required to authorize the service, choose the appropriate process from the "Approval Process" drop down list. To create approval processes, see the Approval Processes section of this manual. When all desired services have been linked to the provider, click the Save button on the bottom right of the form.

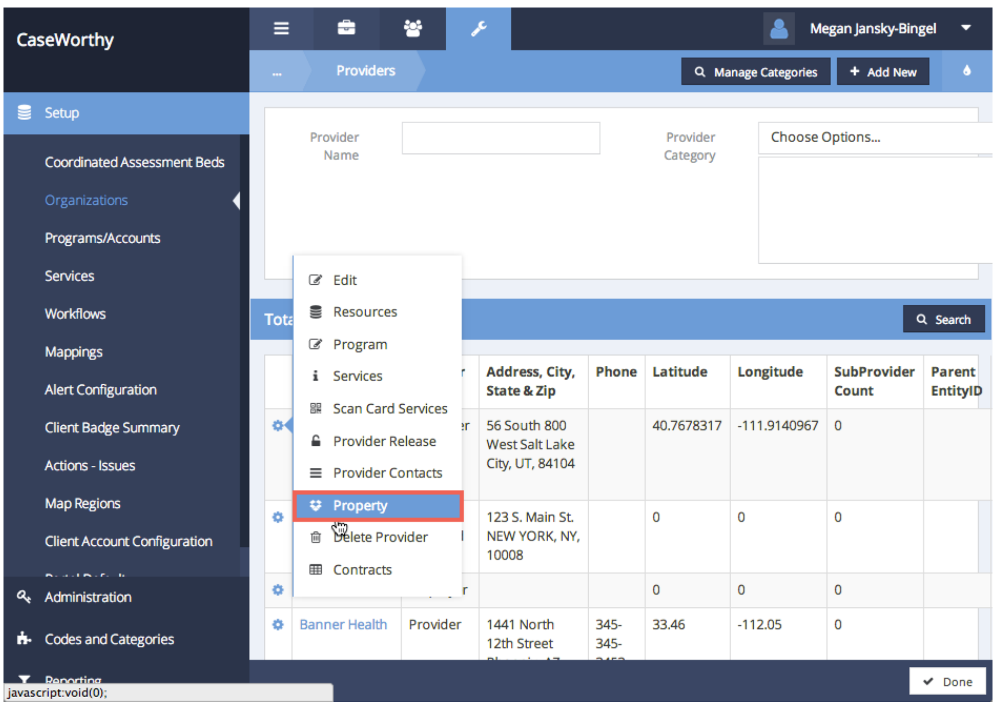

CaseWorthy
Megan Jansky-Bingel
Provider Services
Setup
Coordinated Assessment Beds
Organizations
Programs/Accounts
Services
Workflows
Mappings
Alert Configuration
Client Badge Summary
Actions - Issues
Map Regions
Client Account Configuration
Administration
Codes and Categories
Reporting
Category
Search
Service Type ID
Referral Service Description
Allow Service Posting
Allow Referral
Approval Process
Post Service *
161
AA Meeting
2 Step App
--Nothing--
2 Step Approval
FM double Approval
Gift Cards - Approval / Reconciliation Processes
Gift Cards - Transfer Between Case Managers
Incentive Approval Process
180
ADC
162
Adult Counseling Service
268
AIDS Pharmaceutical Assistance
114
Alcohol Counseling
116
Alcohol or Drug Abuse Services
119
Anger Management
Single Appr
181
Assessment Fee for Adults
No
Save
Cancel
javascript:;

Linking Landlord Properties to Providers

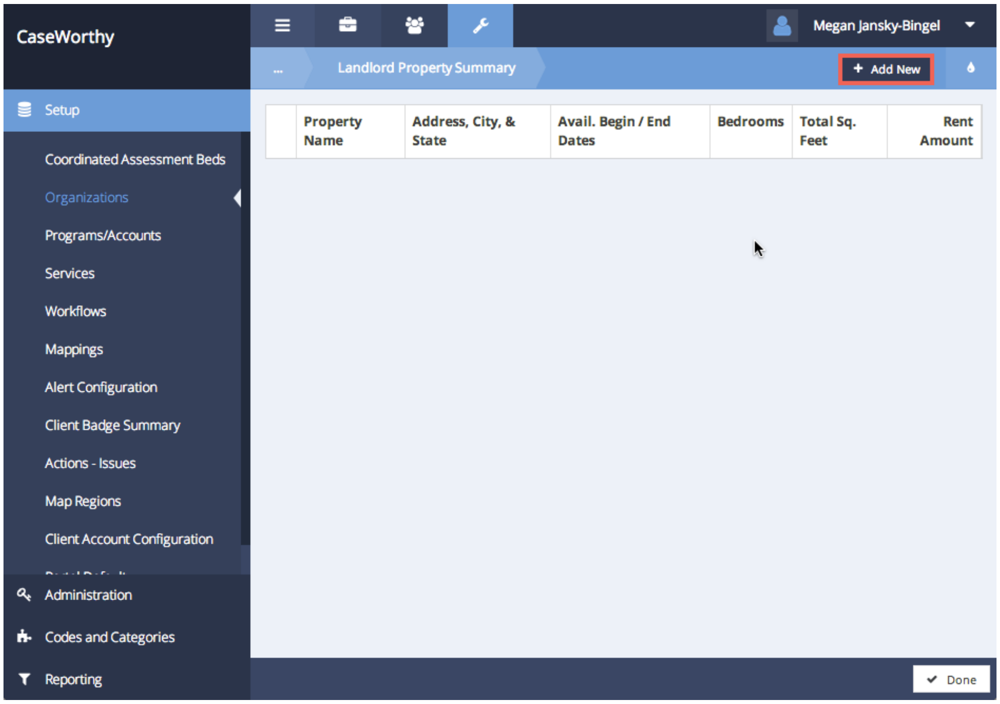
(Administration>Setup>Organizations>Providers>Property)

Often, housing assistance programs work with third party property managers or landlords. To track housing placement and retention, as well as rent and other housing assistance provided to clients, these third-party housing providers need to be entered into the system. The actual business should be entered as the provider and each property should be listed in the Landlord Properties section.

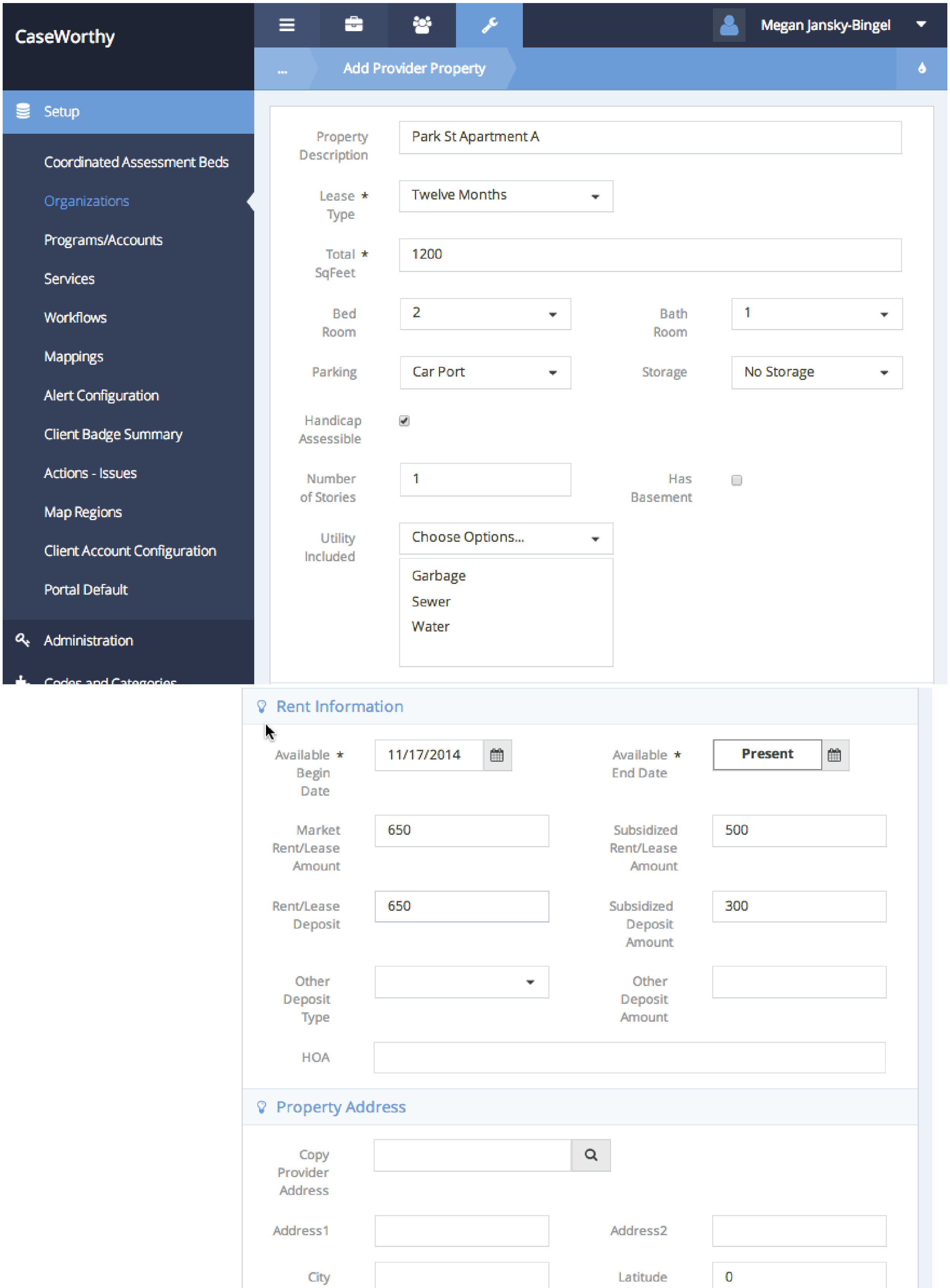
From the Provider summary form, click on the action gear next to the desired provider and select "Property".

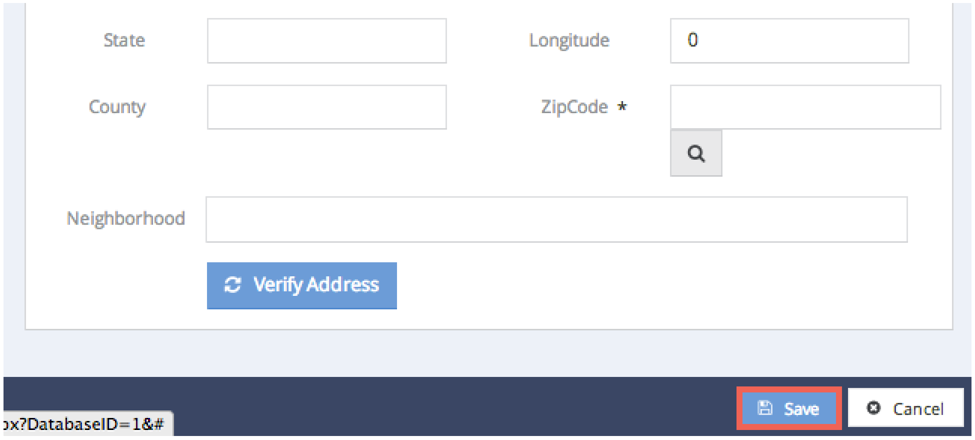


The Landlord Property summary form displays. To enter a property, click the Add New button on the top right side of the form.



The Provider Property form displays. Enter all relevant/required information. If the property address is the same as the landlord/provider's address, use the "Copy Provider Address" look-up to populate the fields. Otherwise, type in the address information for the property. When finished, click the Save button on the bottom right side of the form.


CaseWorthy
Megan Jansky-Bingel
...
Add Provider Property
Setup
Coordinated Assessment Beds
Organizations
Programs/Accounts
Services
Workflows
Mappings
Alert Configuration
Client Badge Summary
Actions - Issues
Map Regions
Client Account Configuration
Portal Default
Administration
Codes and Categories
Property Description
Park St Apartment A
Lease Type *
Twelve Months
Total SqFeet *
1200
Bed Room
2
Bath Room
1
Parking
Car Port
Storage
No Storage
Handicap Assessible
Number of Stories
1
Has Basement
Utility Included
Choose Options...
Garbage
Sewer
Water
Rent Information
Available Begin Date *
11/17/2014
Available End Date *
Present
Market Rent/Lease Amount
650
Subsidized Rent/Lease Amount
500
Rent/Lease Deposit
650
Subsidized Deposit Amount
300
Other Deposit Type
Other Deposit Amount
HOA
Property Address
Copy Provider Address
Address1
Address2
City
Latitude
0



The Landlord Property summary form presents. To enter additional properties for this landlord/provider, simply click the + Add New button on the top right and repeat the steps above.

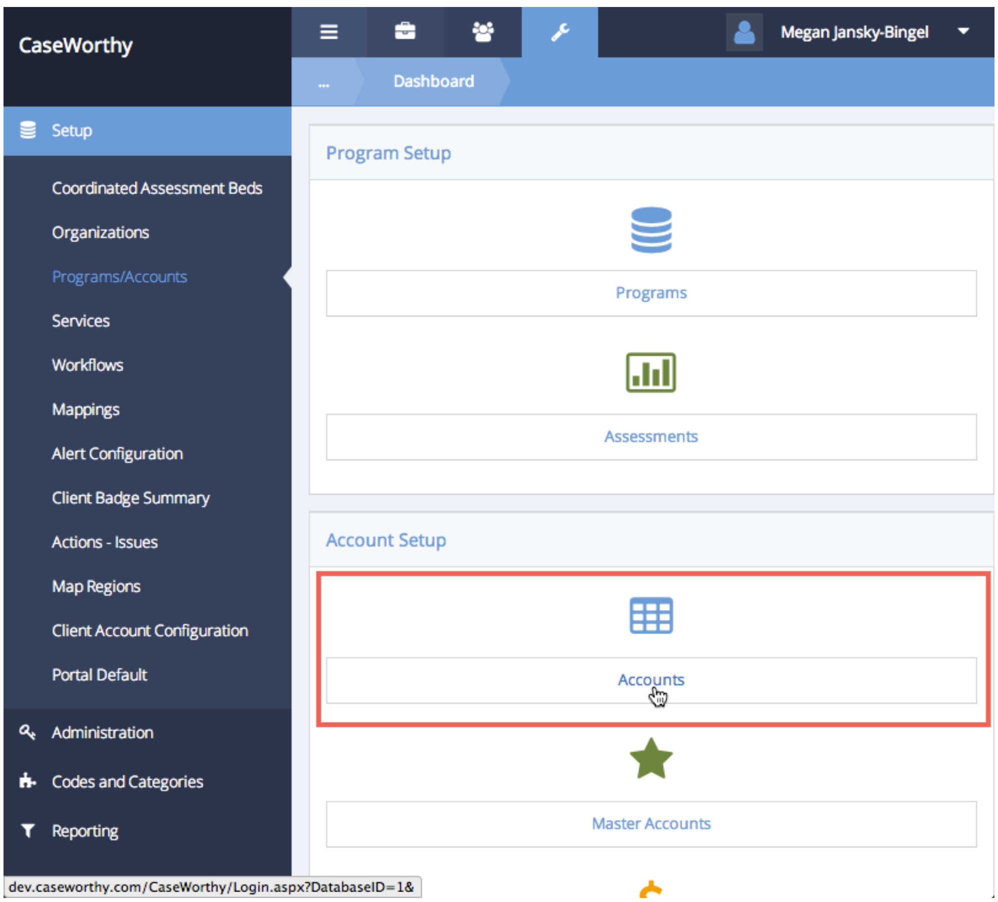
Accounts

(Administration>Setup>Programs/Accounts>Accounts)

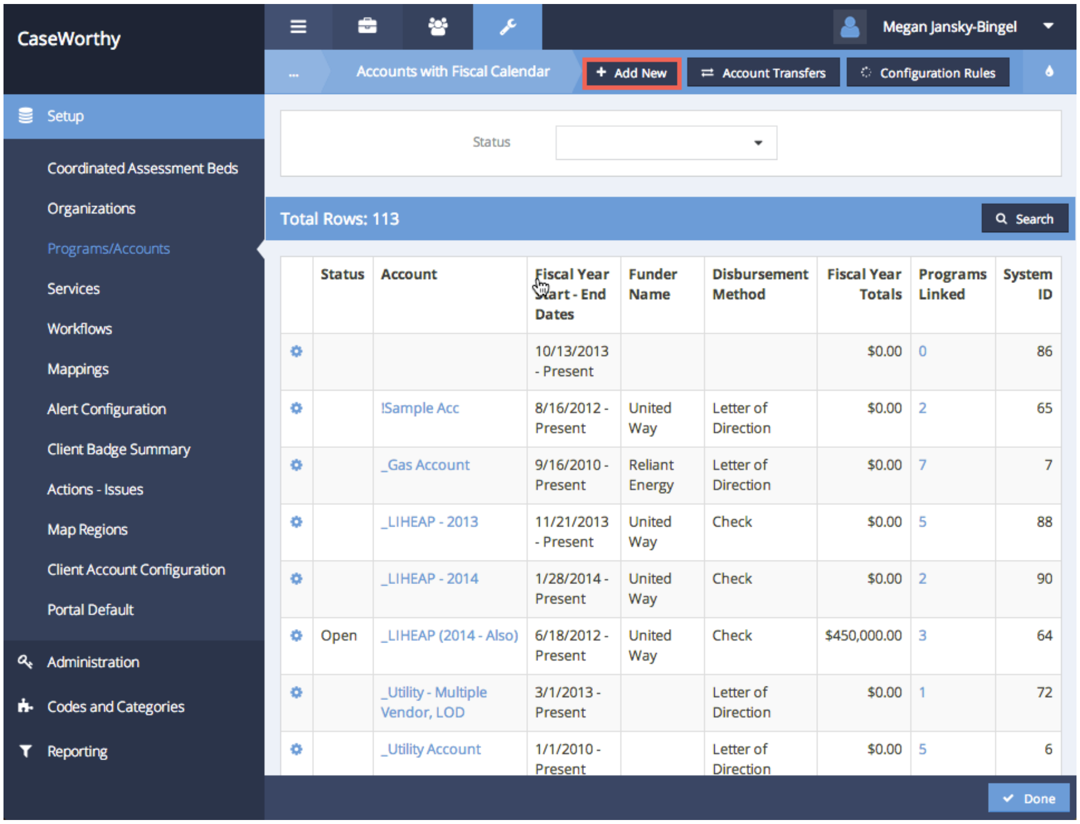
In CaseWorthy™, the accounts functionality can be used for a variety of purposes – managing spend down on grants, such as utility assistance; tracking client payments for services and fees; and creating approval processes

If the account requires an approval process, skip ahead and set up the Approval Group and Approval Processes first.

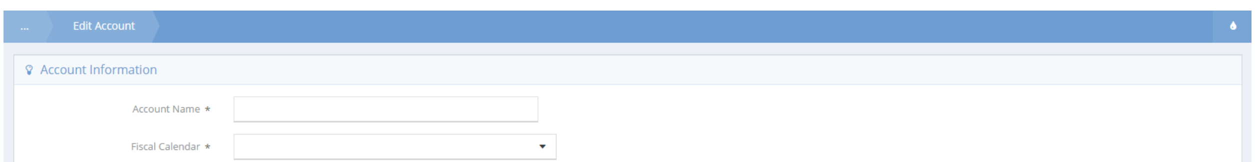
To create a new account, from the Program/Accounts dashboard, select "Accounts"



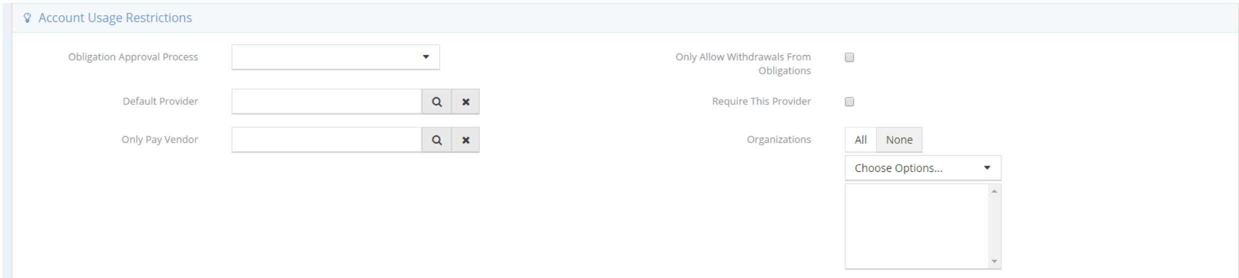
From the Account summary form, click the + Add New button.



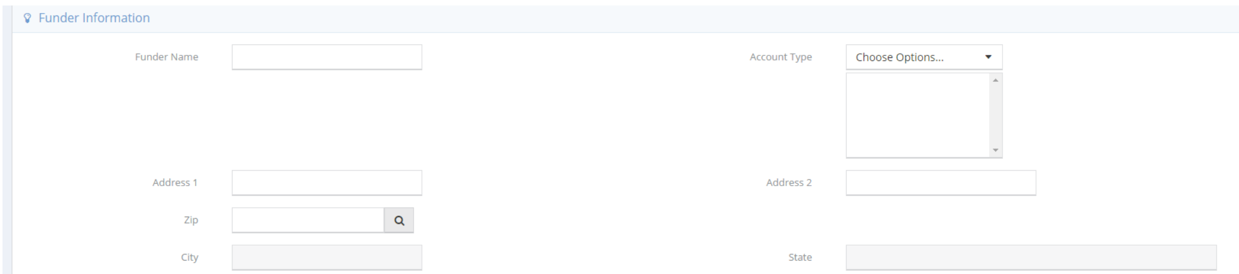
Enter a name for the account. Choose the relevant fiscal year from the drop-down box labeled Fiscal Calendar.



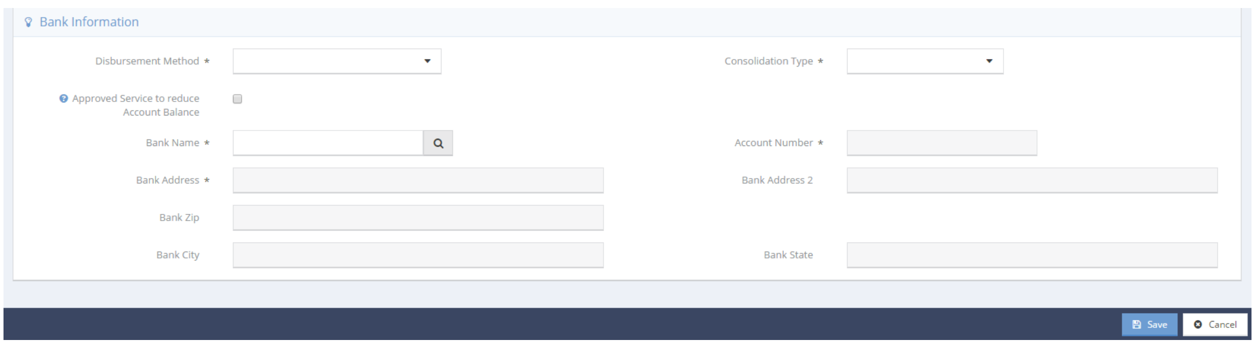
If an approval process is required, use the drop-down list to select the desired process (see the Approval Group/Team and Approval Process set up sections of this manual for information on creating approval processes). If the funds from the account are primarily used to pay or reimburse a specific company or resource, it can be identified by using the “default provider” look up and can be identified as the “sole source” by checking the “Require this Provider” checkbox (such as a utility company for a utility assistance fund). If only one particular entity should ever receive payments generated through the CaseWorthy™ system use the “Only Pay Vendor” look-up. If funds need to be declared available before they can be requested, check the “Only Allow Withdrawals from Obligations” checkbox. Add relevant organizations by click on the clear checkbox on the drop-down box for Organizations, or click the All button to add all organizations.



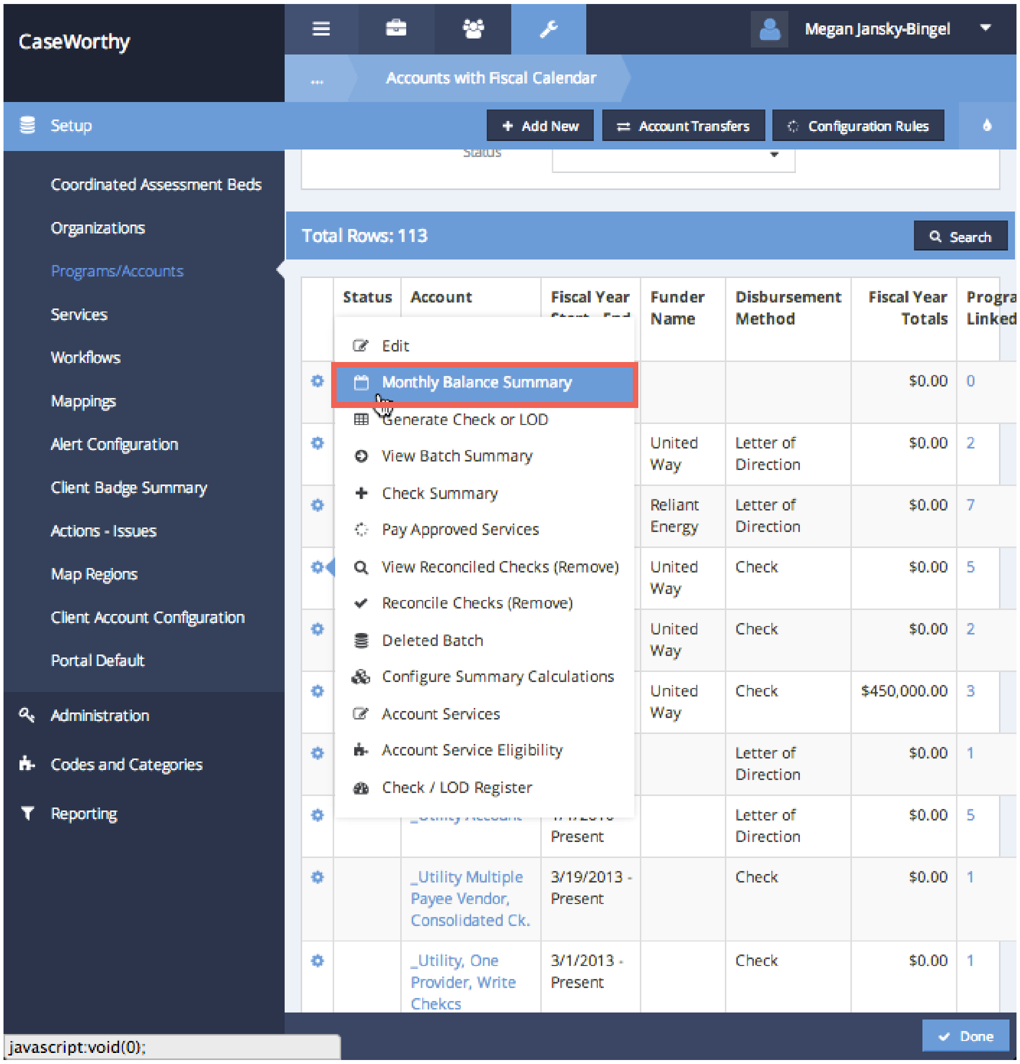
If desired, information regarding the funder for this account can be entered in the Funder Information section.



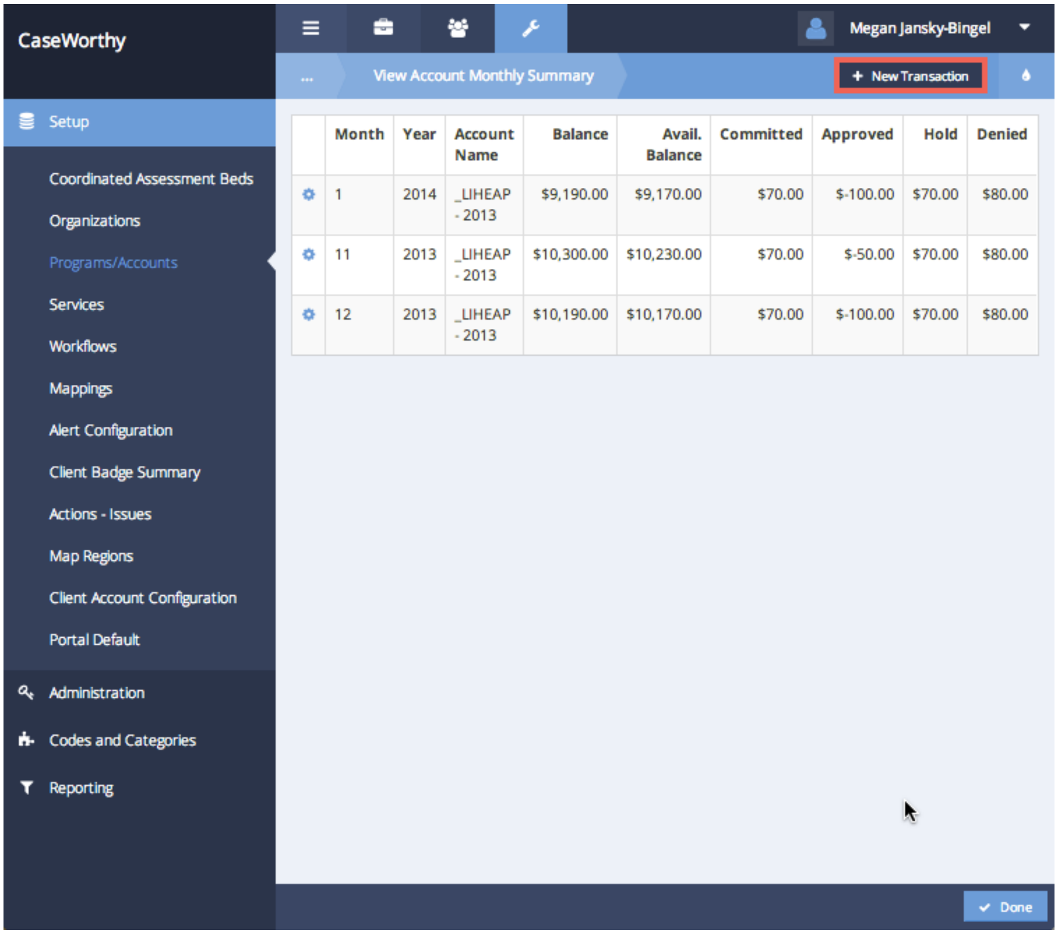
If CaseWorthy™ is being used to generate and print checks, enter the relevant and required Bank Information.



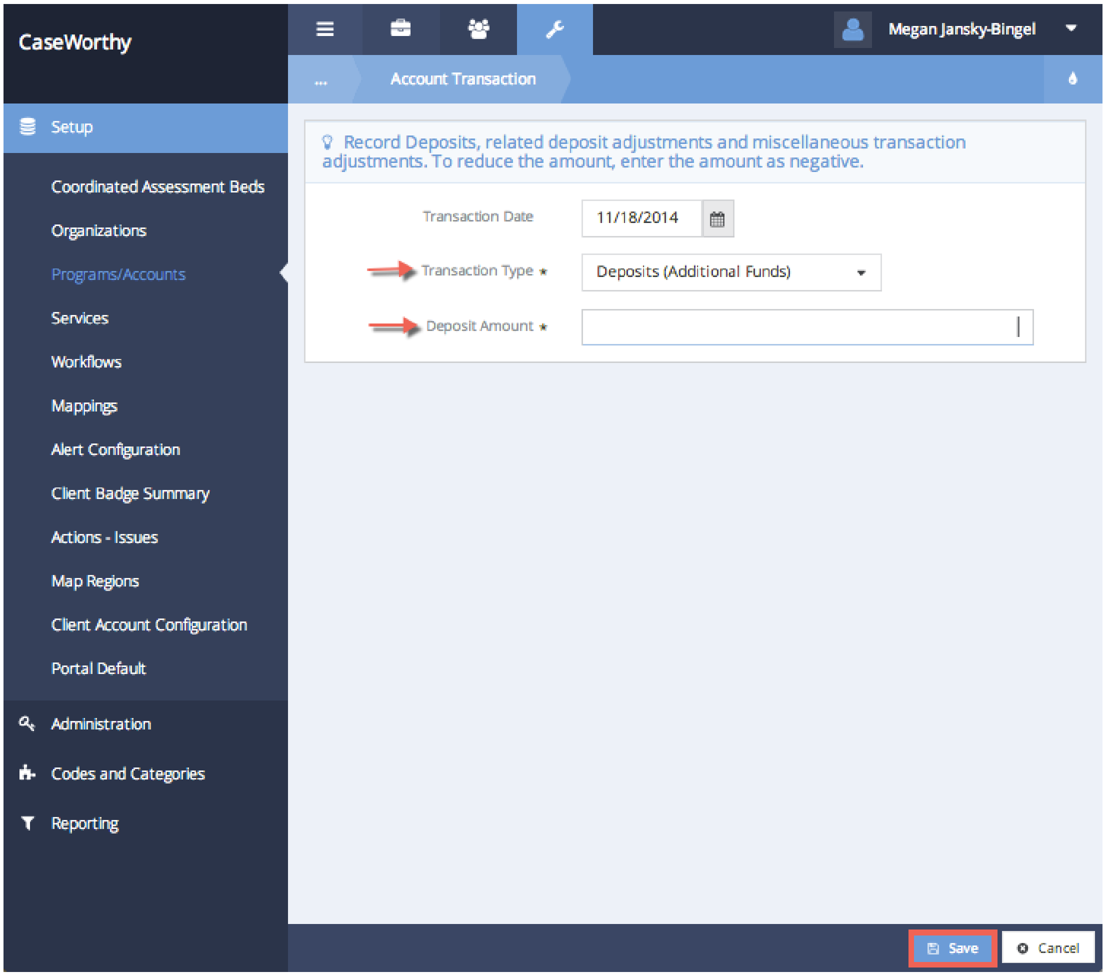
To view the monthly balance summary for an account, from the Accounts summary form click the action gear next to the desired account. Select “Monthly Balance Summary”.



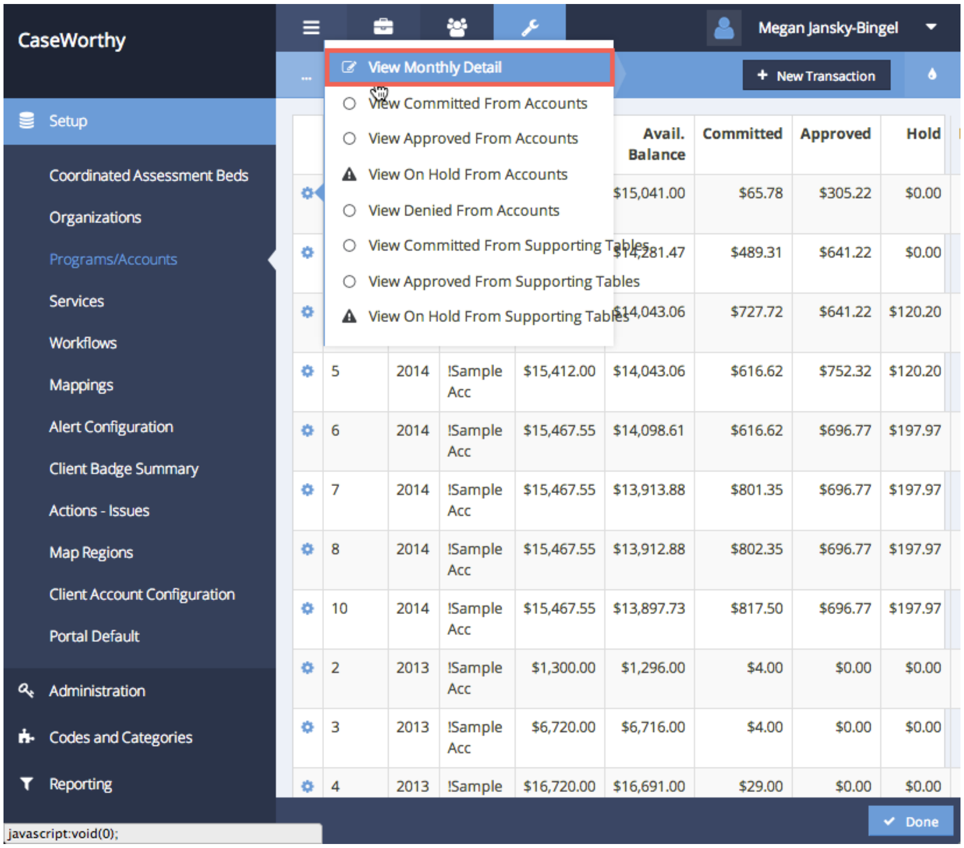
On the Account Monthly Summary form, to add a transaction, click on the **+ New Transaction** button.

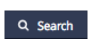


The transaction type defaults to “Deposit”. Enter the amount to be deposited into the account and click the Save button.

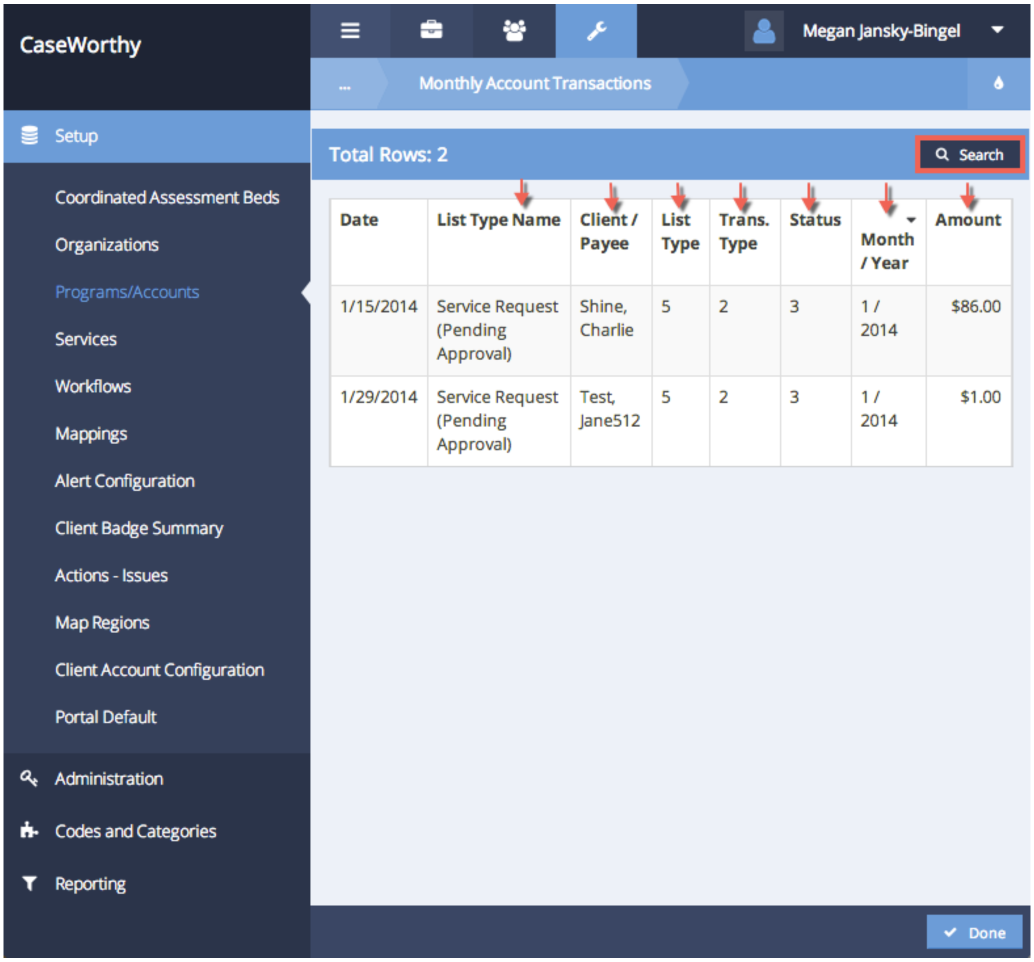


To view monthly transaction history, in the Account Monthly Summary field, click the gear next to the account and month of interest and select "View Monthly Detail".

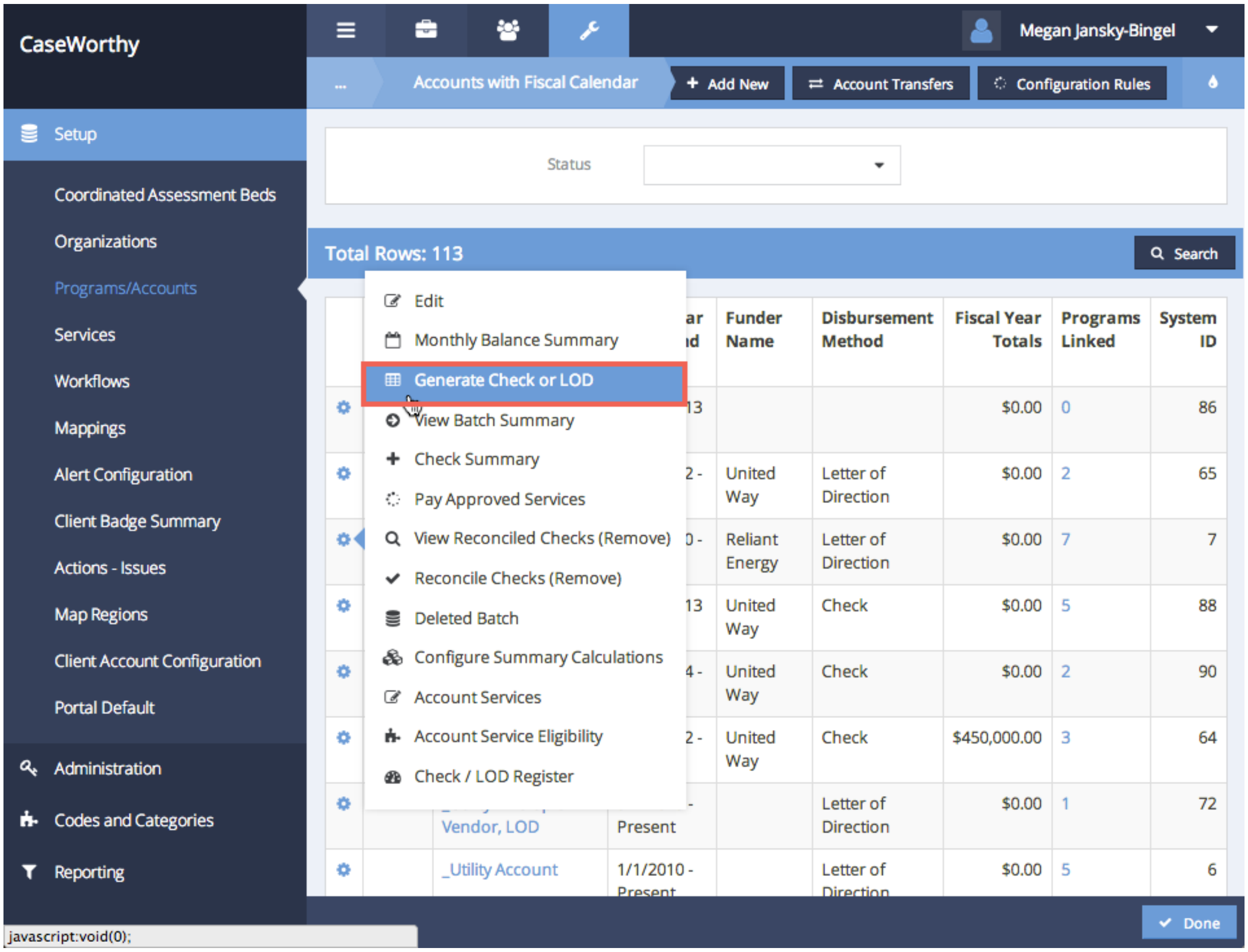


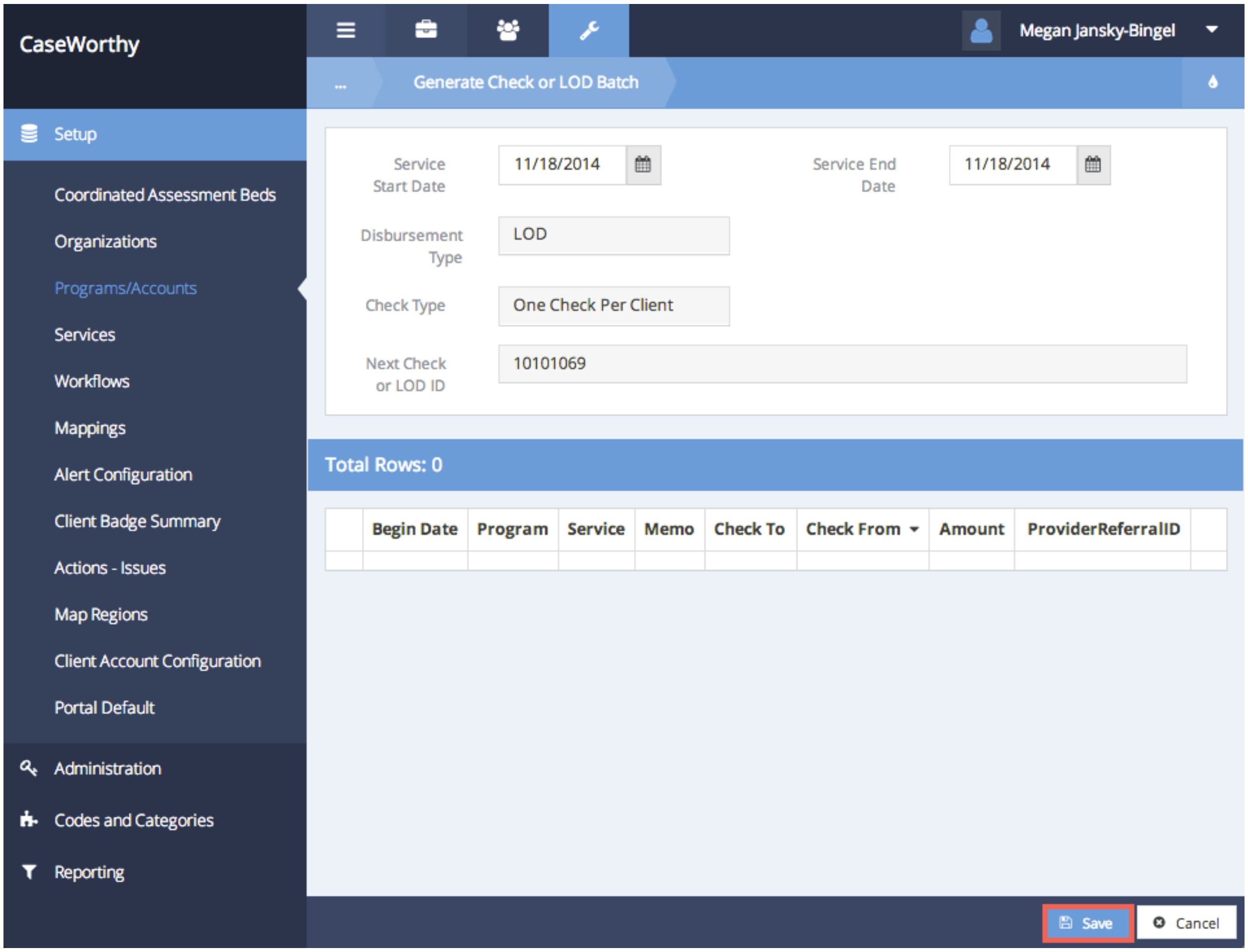
In the monthly account transactions field, click any of the column headers to reorder transactions by the selected criteria. Click the 

button to view transaction records that meet the search criteria.



To generate a check or letter of direction for an account, click the gear  next to the desired account and select "Generate Check or LOD".


CaseWorthy
Megan Jansky-Bingel
Accounts with Fiscal Calendar
Add New
Account Transfers
Configuration Rules
Setup
Coordinated Assessment Beds
Organizations
Programs/Accounts
Services
Workflows
Mappings
Alert Configuration
Client Badge Summary
Actions - Issues
Map Regions
Client Account Configuration
Portal Default
Administration
Codes and Categories
Reporting
Status
Total Rows: 113
Search
Edit
Monthly Balance Summary
Generate Check or LOD
View Batch Summary
Check Summary
Pay Approved Services
View Reconciled Checks (Remove)
Reconcile Checks (Remove)
Deleted Batch
Configure Summary Calculations
Account Services
Account Service Eligibility
Check / LOD Register
Funder Name
Disbursement Method
Fiscal Year Totals
Programs Linked
System ID
Done
javascript:void(0);

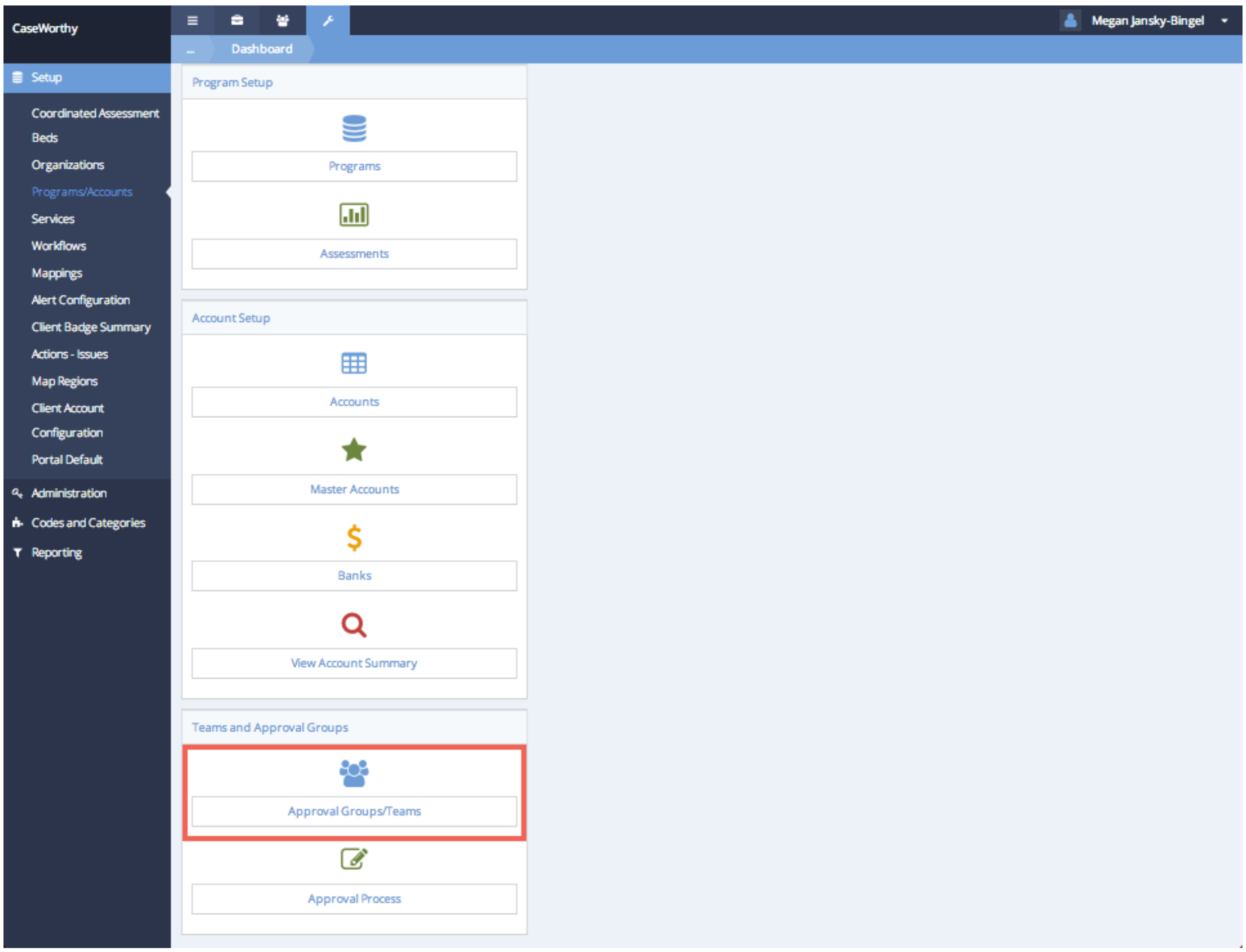

CaseWorthy
Megan Jansky-Bingel
Generate Check or LOD Batch
Setup
Coordinated Assessment Beds
Organizations
Programs/Accounts
Services
Workflows
Mappings
Alert Configuration
Client Badge Summary
Actions - Issues
Map Regions
Client Account Configuration
Portal Default
Administration
Codes and Categories
Reporting
Service Start Date
11/18/2014
Service End Date
11/18/2014
Disbursement Type
LOD
Check Type
One Check Per Client
Next Check or LOD ID
10101069
Total Rows: 0
Begin Date
Program
Service
Memo
Check To
Check From
Amount
ProviderReferralID
Save
Cancel

Approval Groups/Teams

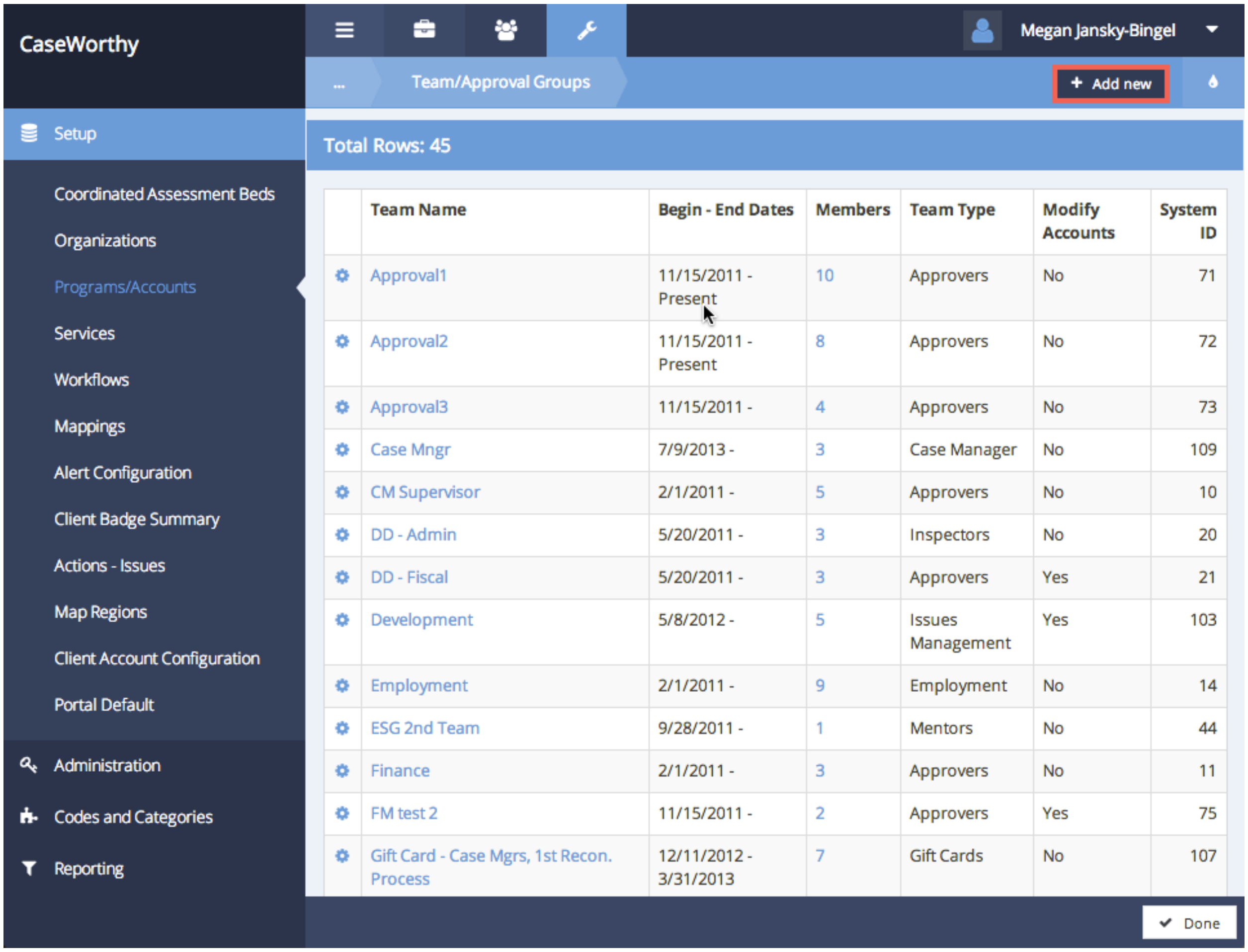
(Administration>Setup>Programs/Accounts>Approval Groups/Teams)

Approval Groups and Teams are set up the same way – the only differences being that Approval Groups are teams that are 1) linked to an account and 2) whose members have authorization to approve account transactions.

From the Program/Accounts dashboard, select "Approval Groups/Teams.

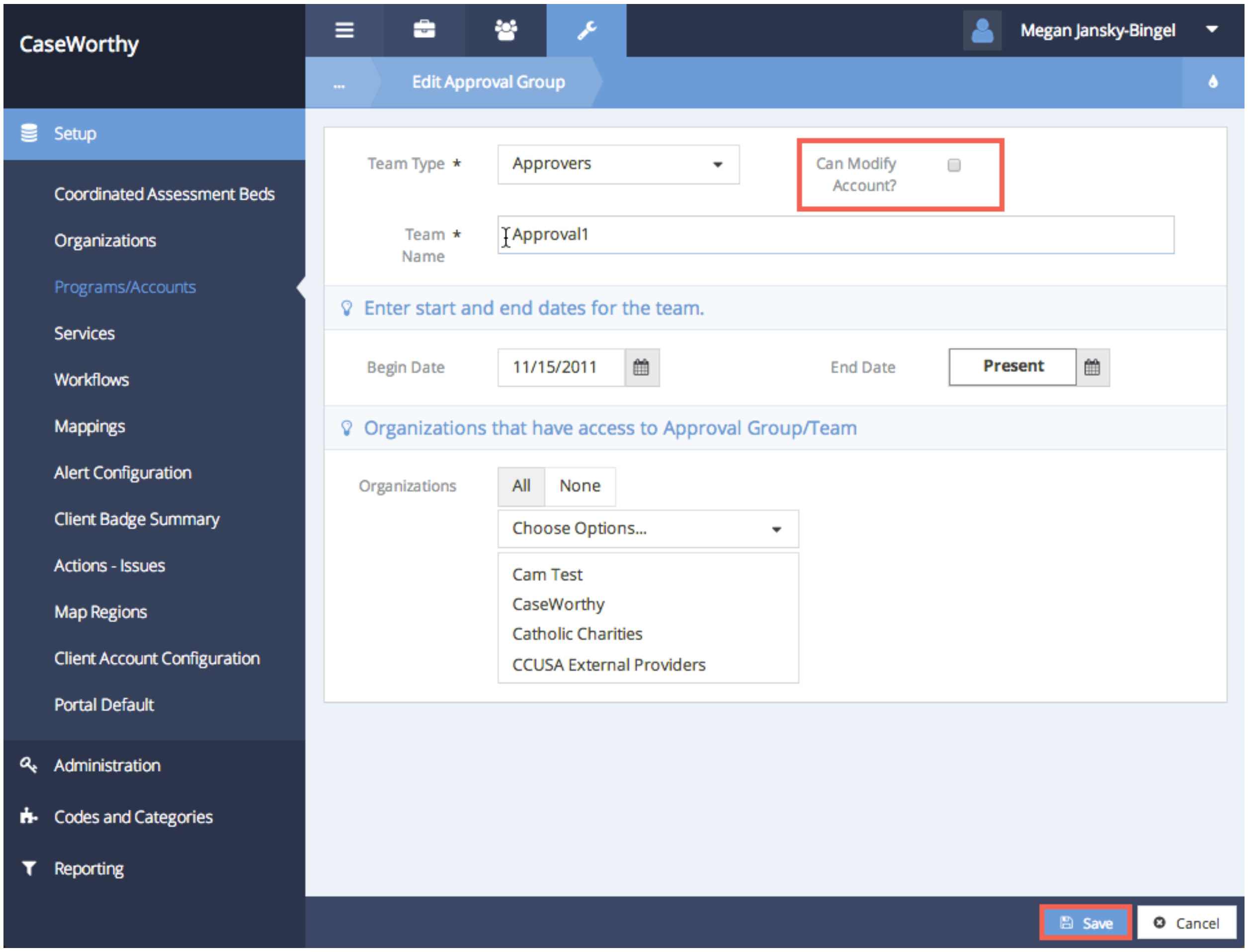


From the Approval Groups/Teams summary form, select the + Add New button.

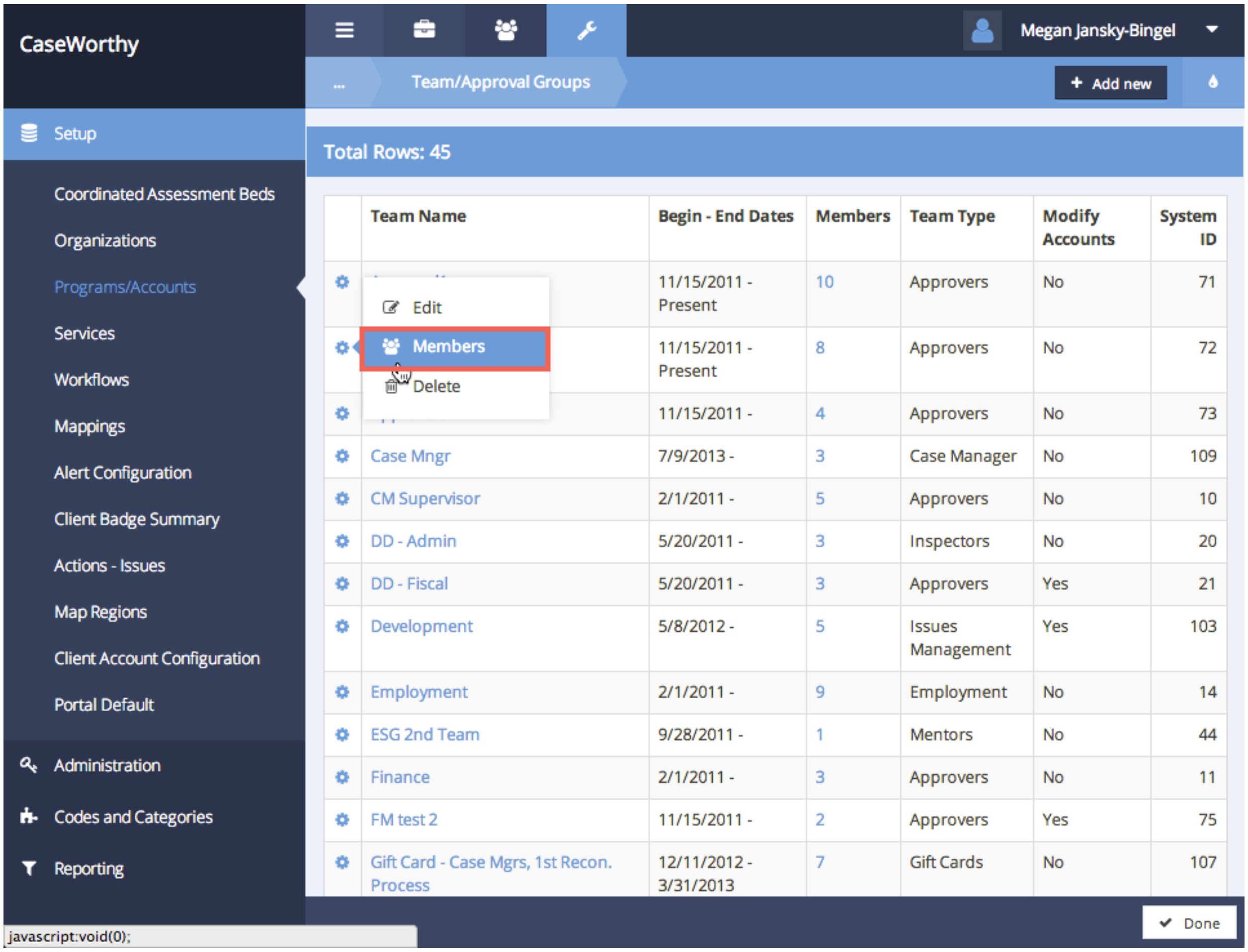


Team Name	Begin - End Dates	Members	Team Type	Modify Accounts	System ID
Approval1	11/15/2011 - Present	10	Approvers	No	71
Approval2	11/15/2011 - Present	8	Approvers	No	72
Approval3	11/15/2011 -	4	Approvers	No	73
Case Mngr	7/9/2013 -	3	Case Manager	No	109
CM Supervisor	2/1/2011 -	5	Approvers	No	10
DD - Admin	5/20/2011 -	3	Inspectors	No	20
DD - Fiscal	5/20/2011 -	3	Approvers	Yes	21
Development	5/8/2012 -	5	Issues Management	Yes	103
Employment	2/1/2011 -	9	Employment	No	14
ESG 2nd Team	9/28/2011 -	1	Mentors	No	44
Finance	2/1/2011 -	3	Approvers	No	11
FM test 2	11/15/2011 -	2	Approvers	Yes	75
Gift Card - Case Mgrs, 1st Recon. Process	12/11/2012 - 3/31/2013	7	Gift Cards	No	107

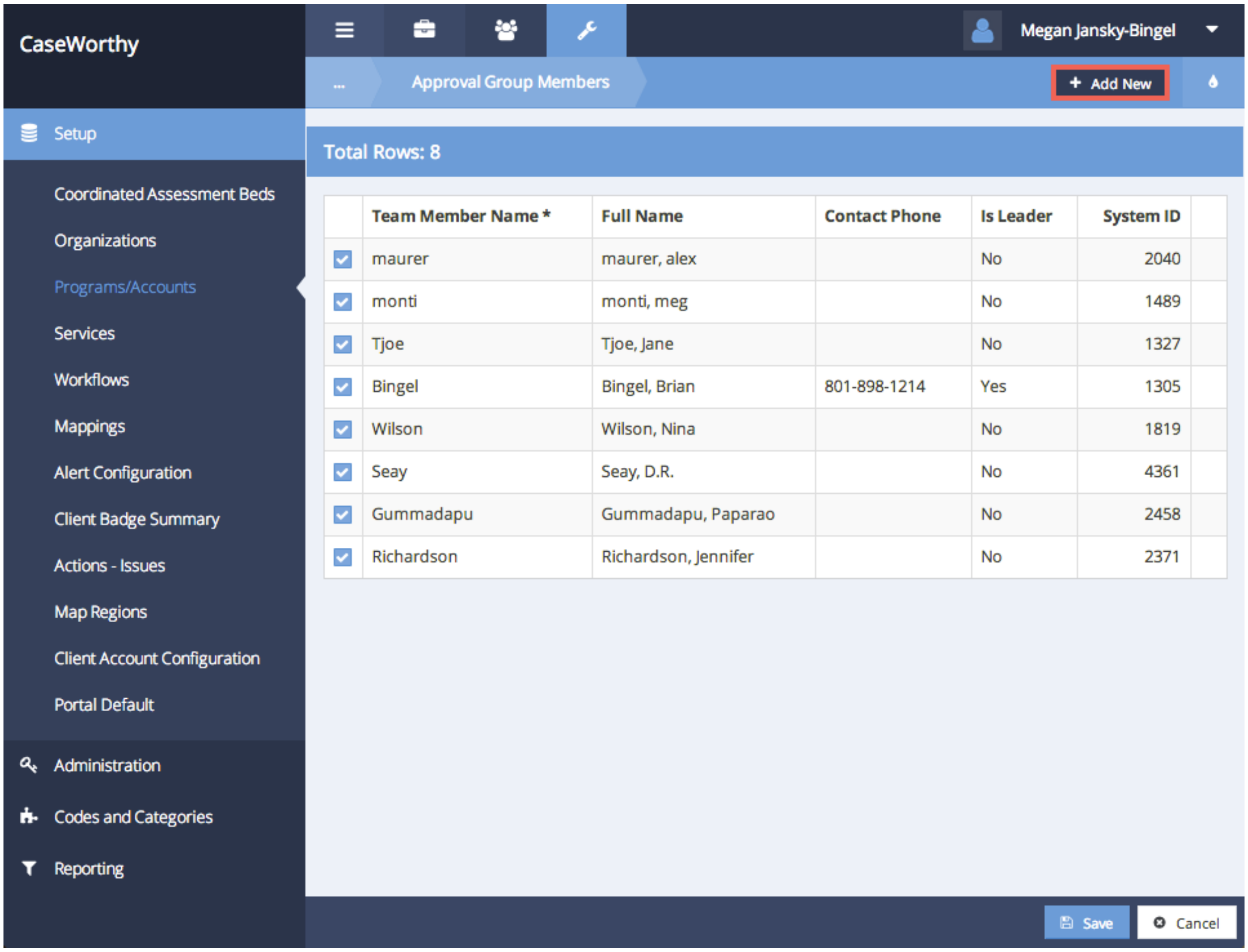
On the Add Approval Group/Team form, use the drop-down list to assign a team type such as Approvers, Managers, Employment, Housing, Drug Testing, etc. If the team is assigned to account approvals, indicate if members have authorization to modify the account. Teams that are not set up as approvers to accounts are typically assigned specific tasks using the "Follow-Up" functionality in the system. These tasks can be related to housing or employment retention, administering drug tests, managing inventory, and handling help tickets in the Issues Management area. Enter a name for the team, as well as begin and end dates. Identify the organizations that can have members included on the team. When all relevant and/or required information has been entered, click the Save button.



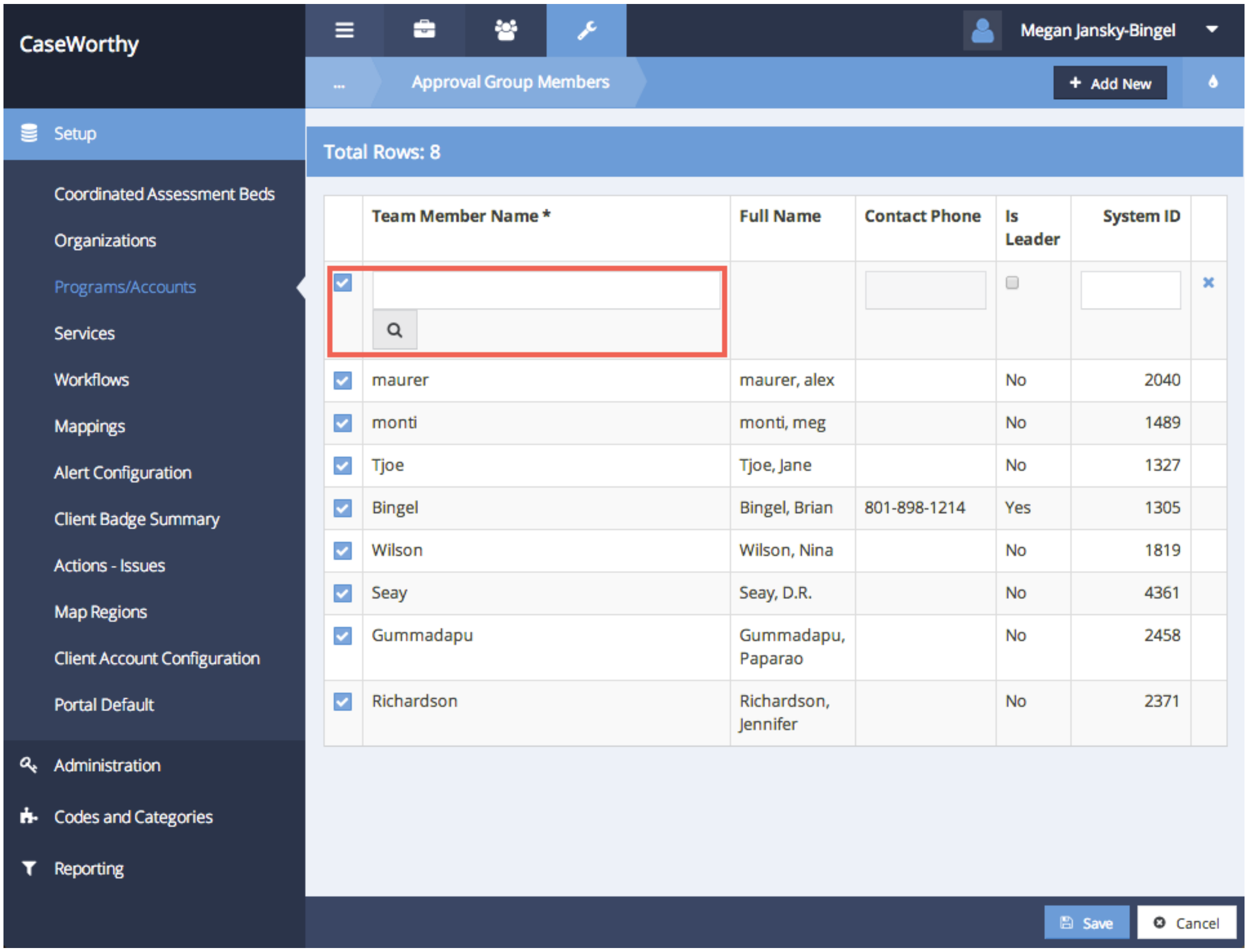
The Approval Group/Team summary form displays. To add members to the team, click on the action gear next to the desired team and select "Members".



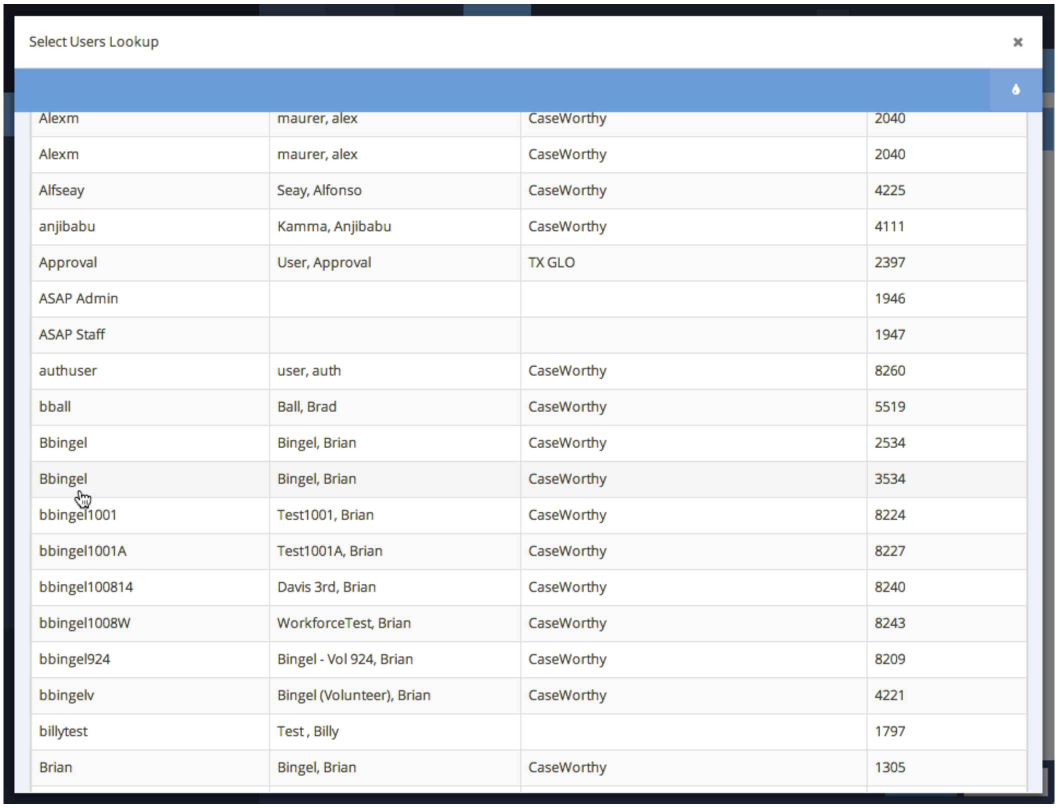
On the Approval Group Members summary form, select the + Add New button.



Use the look-up field to access the User’s Search form.

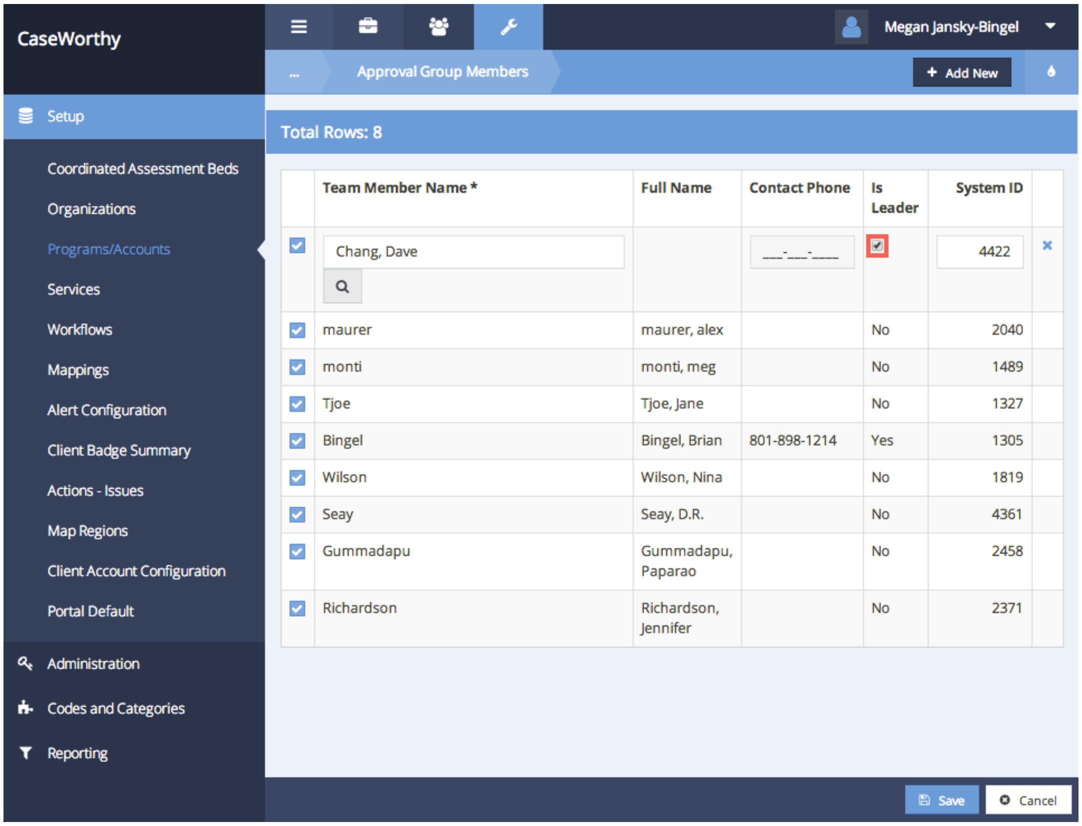


On the search form, find the desired user to add to the team and click on the row containing their name.



Alexm	maurer, alex	CaseWorthy	2040
Alexm	maurer, alex	CaseWorthy	2040
Alfseay	Seay, Alfonso	CaseWorthy	4225
anjibabu	Kamma, Anjibabu	CaseWorthy	4111
Approval	User, Approval	TX GLO	2397
ASAP Admin			1946
ASAP Staff			1947
authuser	user, auth	CaseWorthy	8260
bball	Ball, Brad	CaseWorthy	5519
Bbingel	Bingel, Brian	CaseWorthy	2534
Bbingel	Bingel, Brian	CaseWorthy	3534
bbingel1001	Test1001, Brian	CaseWorthy	8224
bbingel1001A	Test1001A, Brian	CaseWorthy	8227
bbingel100814	Davis 3rd, Brian	CaseWorthy	8240
bbingel1008W	WorkforceTest, Brian	CaseWorthy	8243
bbingel924	Bingel - Vol 924, Brian	CaseWorthy	8209
bbingelv	Bingel (Volunteer), Brian	CaseWorthy	4221
billytest	Test , Billy		1797
Brian	Bingel, Brian	CaseWorthy	1305

The User is added as a team member. Repeat the steps above to create additional team members. Use the checkbox if desired to identify the team leader. Click Save when all team members have been added.

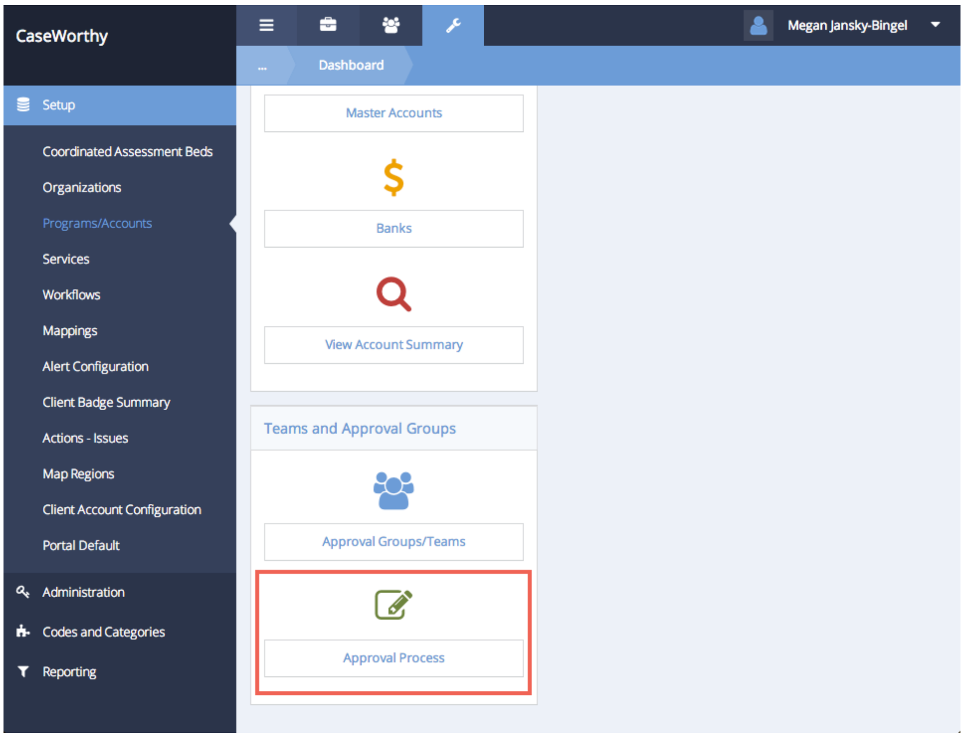

CaseWorthy
Megan Jansky-Bingel
...
Approval Group Members
Add New
Setup
Coordinated Assessment Beds
Organizations
Programs/Accounts
Services
Workflows
Mappings
Alert Configuration
Client Badge Summary
Actions - Issues
Map Regions
Client Account Configuration
Portal Default
Administration
Codes and Categories
Reporting
Total Rows: 8
Team Member Name *
Full Name
Contact Phone
Is Leader
System ID
Chang, Dave
4422
maurer
maurer, alex
No
2040
monti
monti, meg
No
1489
Tjoe
Tjoe, Jane
No
1327
Bingel
Bingel, Brian
801-898-1214
Yes
1305
Wilson
Wilson, Nina
No
1819
Seay
Seay, D.R.
No
4361
Gummadapu
Gummadapu, Paparao
No
2458
Richardson
Richardson, Jennifer
No
2371
Save
Cancel

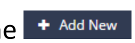
Approval Processes

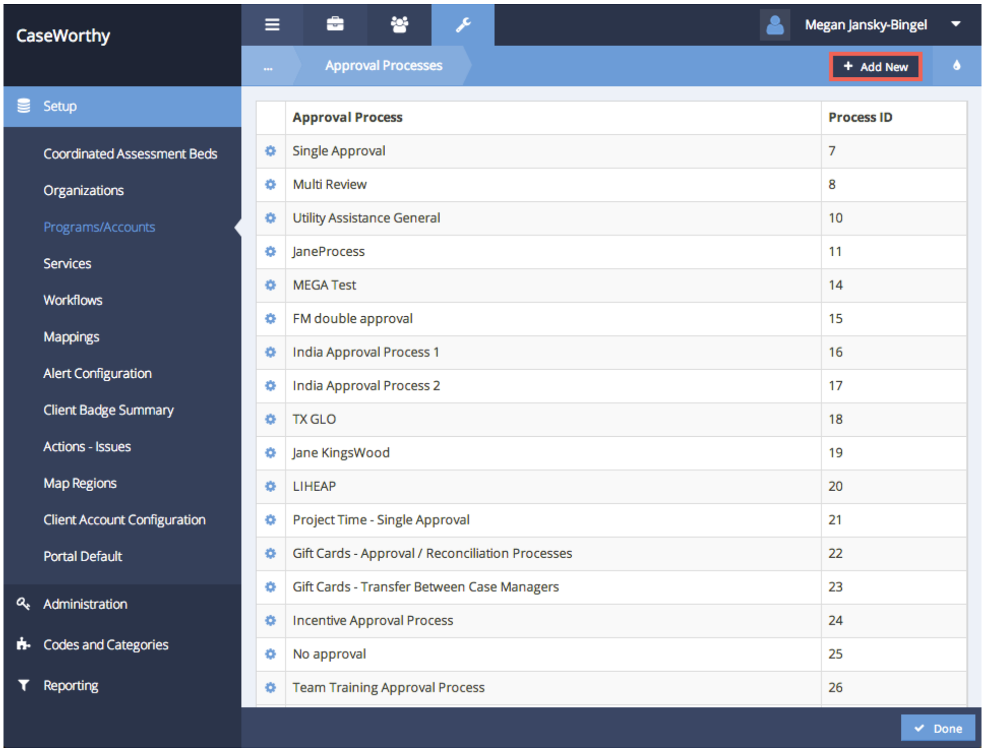
(Administration>Setup>Programs/Accounts>Accounts>Approval Processes)

Approval processes can be created for any activity or task within the system that requires review and approval. Once the process is created, teams can be assigned.

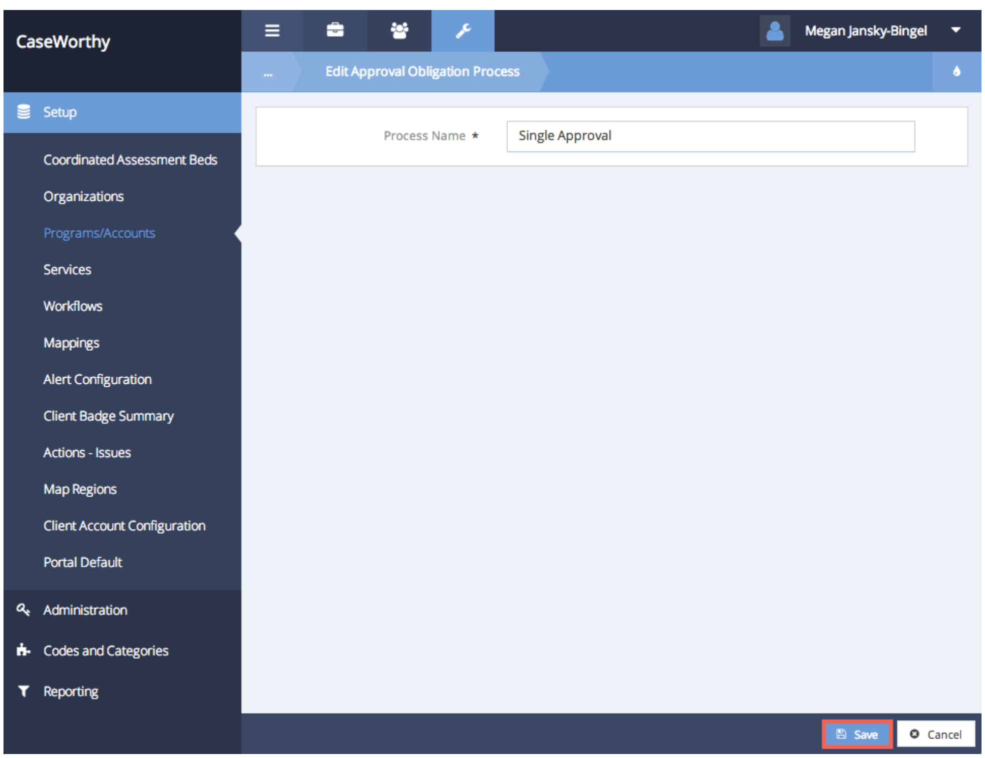
On the Programs/Accounts dashboard, select “Approval Process”.



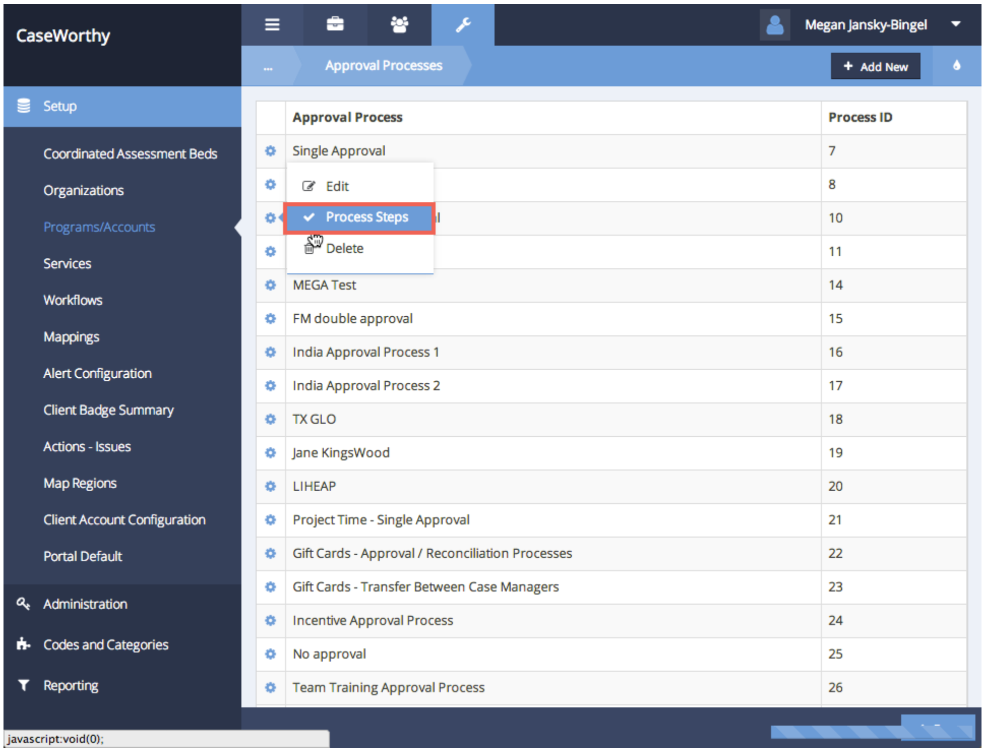
On the Approval Processes summary form, click the  button.



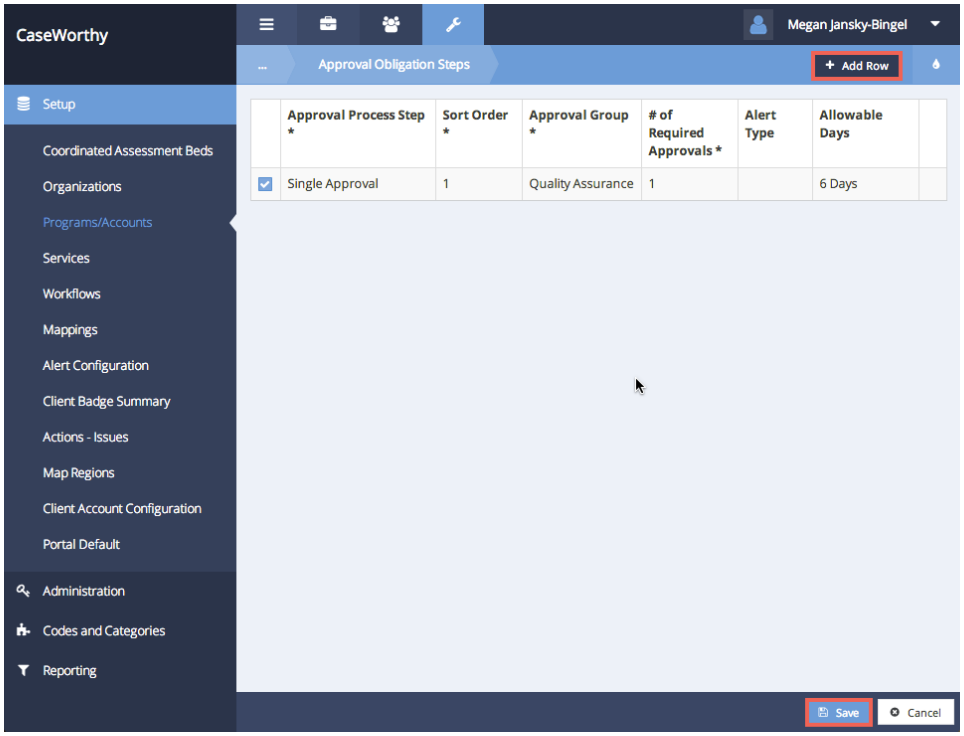
Enter a name for the process, then click the Save button.



On the Approval Process summary form, click the action gear next to the desired process and select "Process Steps".

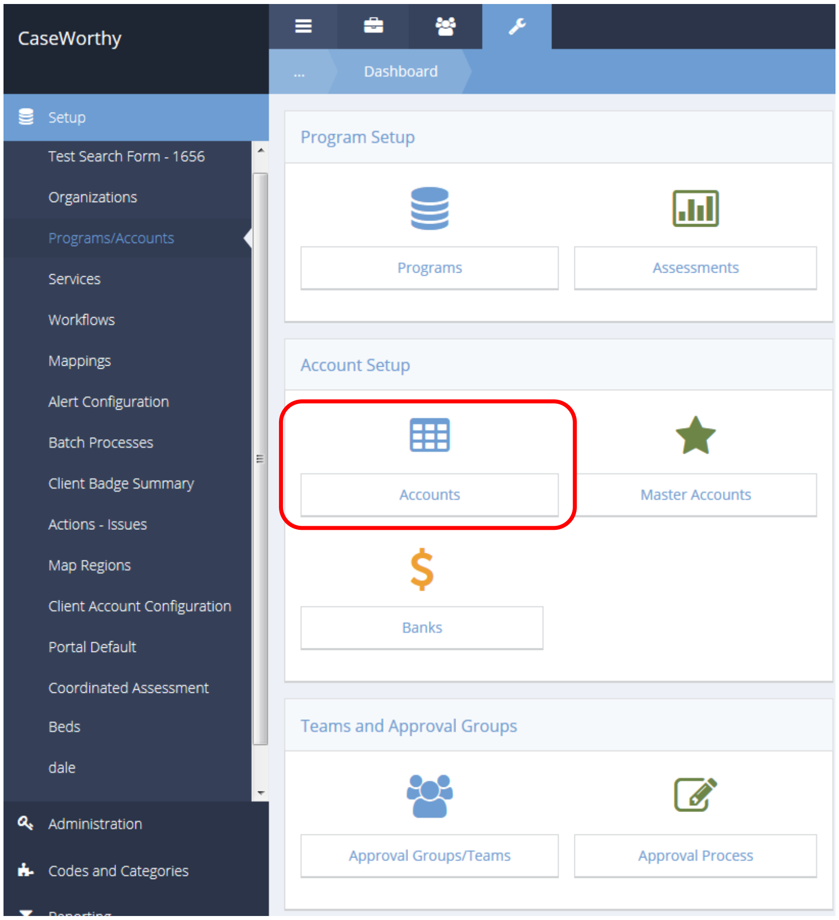


On the Process Steps set up form, click **+ Add Row** to display a row. Enter a name for the step as well as the sort order. Use the drop-down list to link the Approval Group/Team to be linked to the process and the number of approvals that are required to move forward/complete the approval process. If more than one step and/or team is required to fulfill the review process, click **+ Add Row** again to create additional rows until all desired processes are set up. Click **Save** when finished.

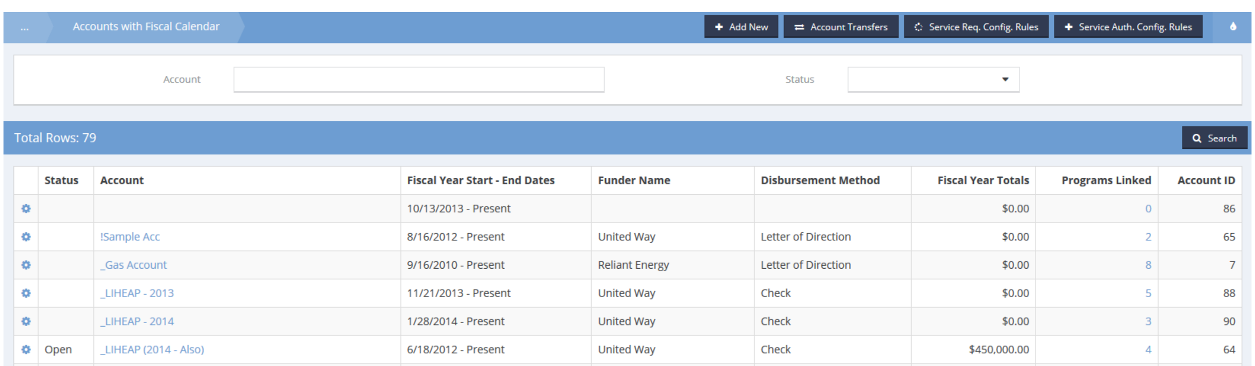


View Account Monthly Summary

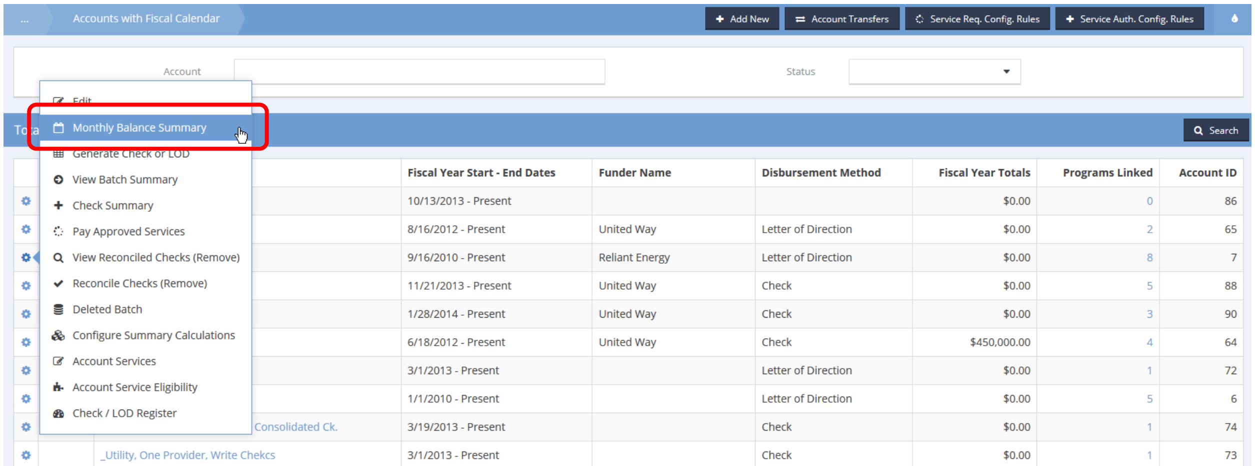
(Administration>Setup>Programs/Accounts>Accounts)



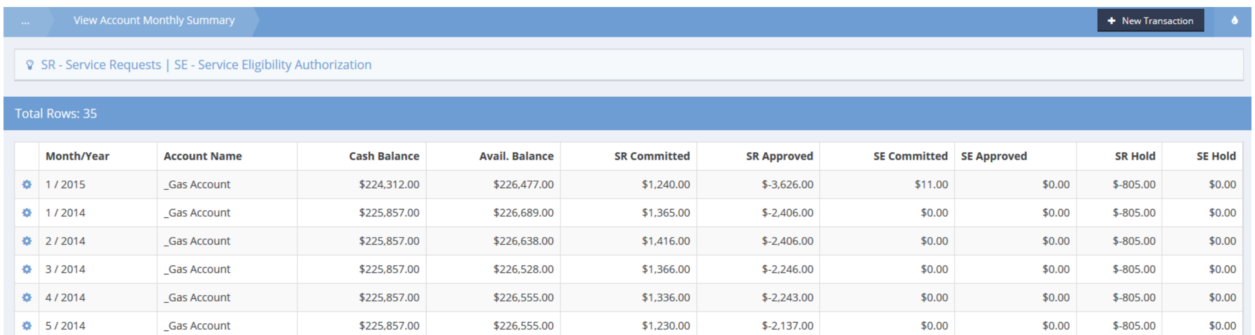
Click the Accounts icon.
The Accounts with Fiscal Calendar form displays.



Click the action gear icon associated with the desired account and select Monthly Balance Summary from the pop up menu that appears.



The View Account Monthly Summary form displays.



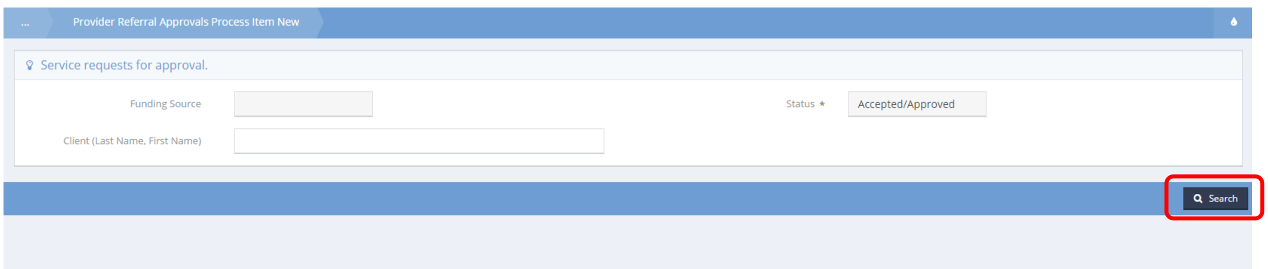
The following sections cover the various summaries that can be accessed through the View Account Monthly Summary form.

Approved Summary by Account

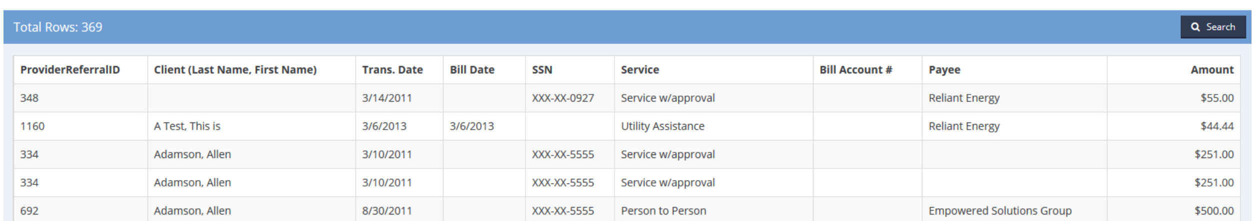
On the View Account Monthly Summary form, click the action gear icon associated with the desired account and select View Approved From Supporting Tables from the pop up menu that appears.

	Month	Year	Account Name	Cash Balance	Avail. Balance	Committed	Approved	Hold	Denied
	1	2014	_Gas Account	$225,857.80	$226,689.70	$1,365.07	$-2,406.97	$-805.12	$0.00
			Account	$225,857.80	$226,638.70	$1,416.07	$-2,406.97	$-805.12	$0.00
			Account	$225,857.80	$226,528.70	$1,366.07	$-2,246.97	$-805.12	$0.00
			Account	$225,857.80	$226,555.19	$1,336.08	$-2,243.47	$-805.12	$0.00
			Account	$225,857.80	$226,555.19	$1,230.01	$-2,137.40	$-805.12	$0.00
			Account	$225,857.80	$226,499.69	$1,230.01	$-2,081.90	$-805.12	$-55.50
			Account	$224,312.50	$226,499.69	$1,229.01	$-3,626.20	$-805.12	$-55.50
			Account	$10,000.00	$9,605.00	$145.00	$250.00	$0.00	$0.00
				$30,000.00	$29,417.80	$157.20	$425.00	$0.00	$0.00
			Account	$30,000.00	$29,417.80	$67.20	$515.00	$0.00	$0.00
	5	2013	_Gas Account	$226,138.80	$229,037.74	$377.26	$-3,276.20	$0.00	$0.00
	6	2013	_Gas Account	$226,067.80	$229,037.74	$376.26	$-3,346.20	$0.00	$0.00

The Provider Referral Approvals Process Item New form displays. To filter by client, enter a name in the Client field. Click on the Search button.



Results display below the search bar.

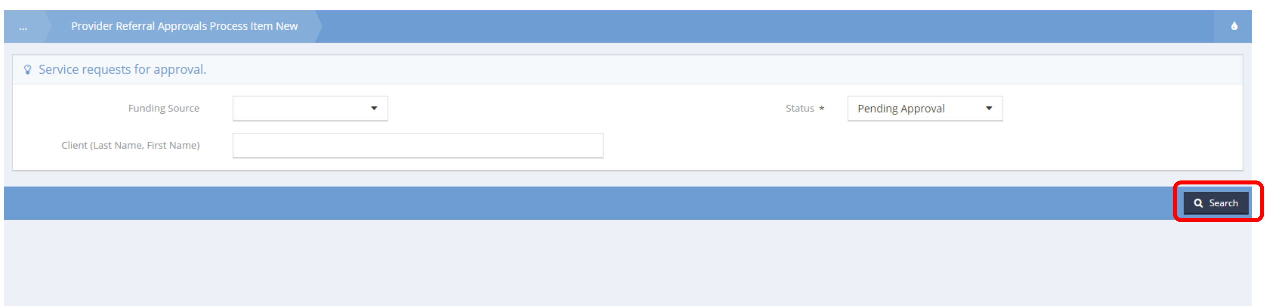


ProviderReferralID	Client (Last Name, First Name)	Trans. Date	Bill Date	SSN	Service	Bill Account #	Payee	Amount
348		3/14/2011		XXX-XX-0927	Service w/approval		Reliant Energy	$55.00
1160	A Test, This is	3/6/2013	3/6/2013		Utility Assistance		Reliant Energy	$44.44
334	Adamson, Allen	3/10/2011		XXX-XX-5555	Service w/approval			$251.00
334	Adamson, Allen	3/10/2011		XXX-XX-5555	Service w/approval			$251.00
692	Adamson, Allen	8/30/2011		XXX-XX-5555	Person to Person		Empowered Solutions Group	$500.00

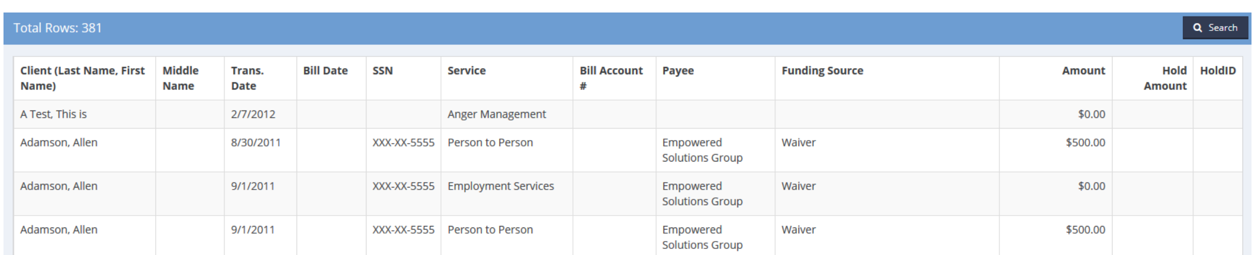
CSD – Committed Summary (All Acts)

On the View Account Monthly Summary form, click the action gear icon associated with the desired account and select View Committed From Supporting Tables from the pop up menu that appears.

The Provider Referral Approvals Process Item New form displays. Select a funding source and status, and enter a name if desired to filter by any of these parameters. Click on the Search button.



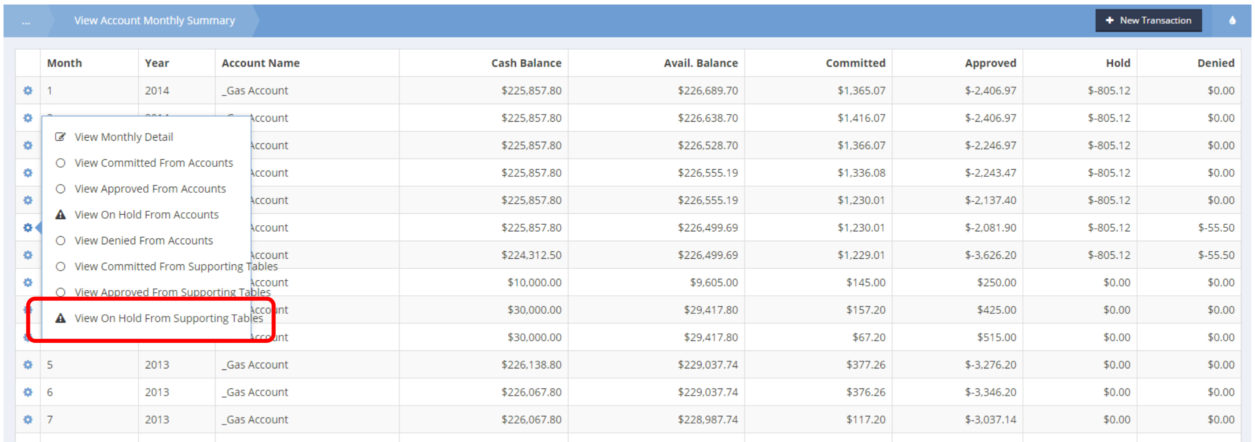
Results display below the search bar.



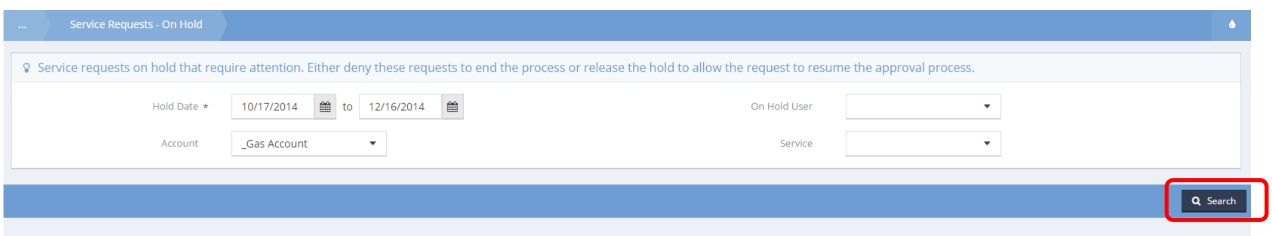
Client (Last Name, First Name)	Middle Name	Trans. Date	Bill Date	SSN	Service	Bill Account #	Payee	Funding Source	Amount	Hold Amount	HoldID
A Test, This is		2/7/2012			Anger Management				$0.00		
Adamson, Allen		8/30/2011		XXX-XX-5555	Person to Person		Empowered Solutions Group	Waiver	$500.00		
Adamson, Allen		9/1/2011		XXX-XX-5555	Employment Services		Empowered Solutions Group	Waiver	$0.00		
Adamson, Allen		9/1/2011		XXX-XX-5555	Person to Person		Empowered Solutions Group	Waiver	$500.00		

CSD – Service Reqs – On Hold (View Only)

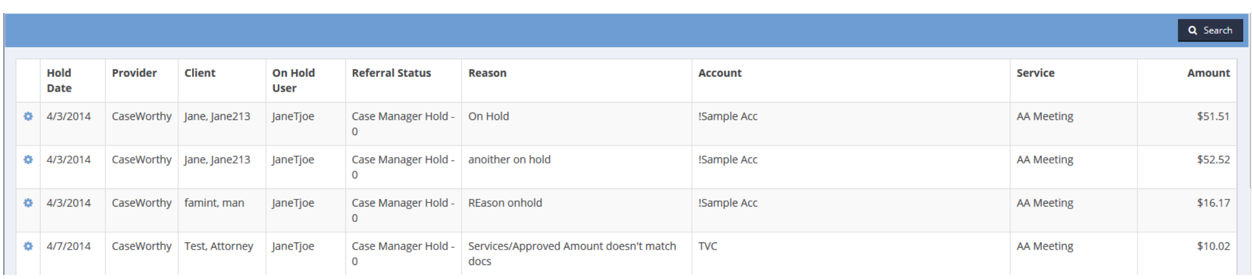
On the View Account Monthly Summary form, click the action gear icon associated with the desired account and select View On Hold From Supporting Tables from the pop up menu that appears.



The Provider Referral Approvals Process Item New form displays. Select a date range. Select a user and service if desired. Click on the Search button.



Results display below the search bar.



View Account Monthly Summary

(Administration>Setup>Programs/Accounts>Accounts)

System Mapping

(Administration>Setup>Mappings)

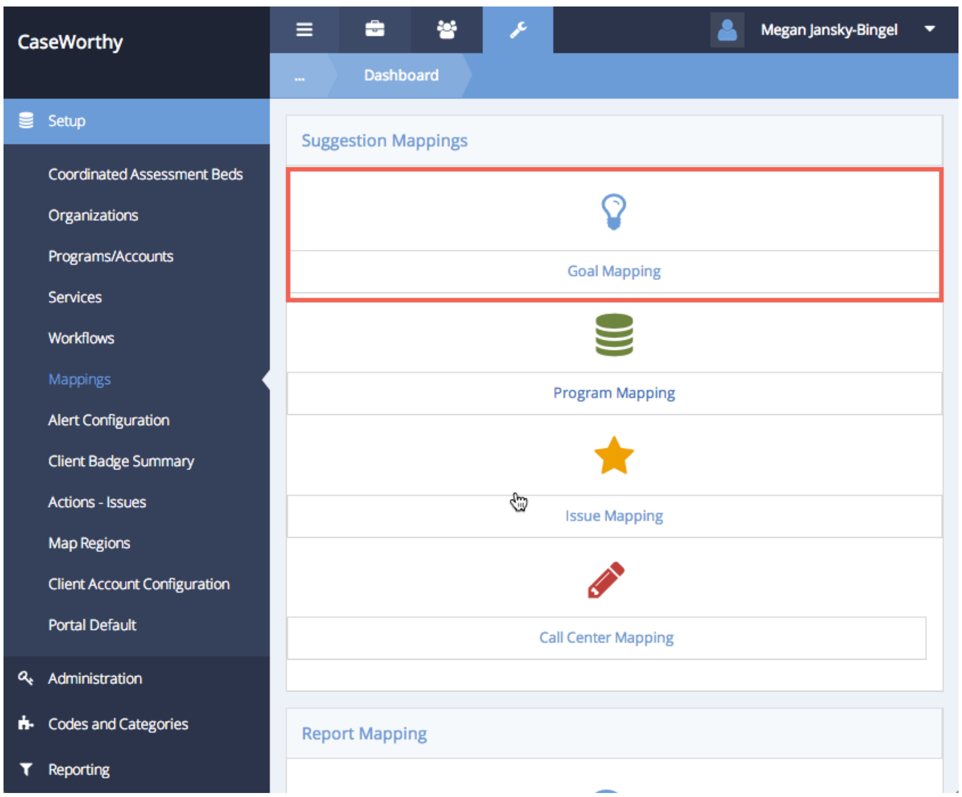
In CaseWorthy™, links can be made for various tasks, processes and/or reports. To set up the desired linkages, click on the "Mappings" link on the Set-Up menu in the Administration area.

Goal Mapping

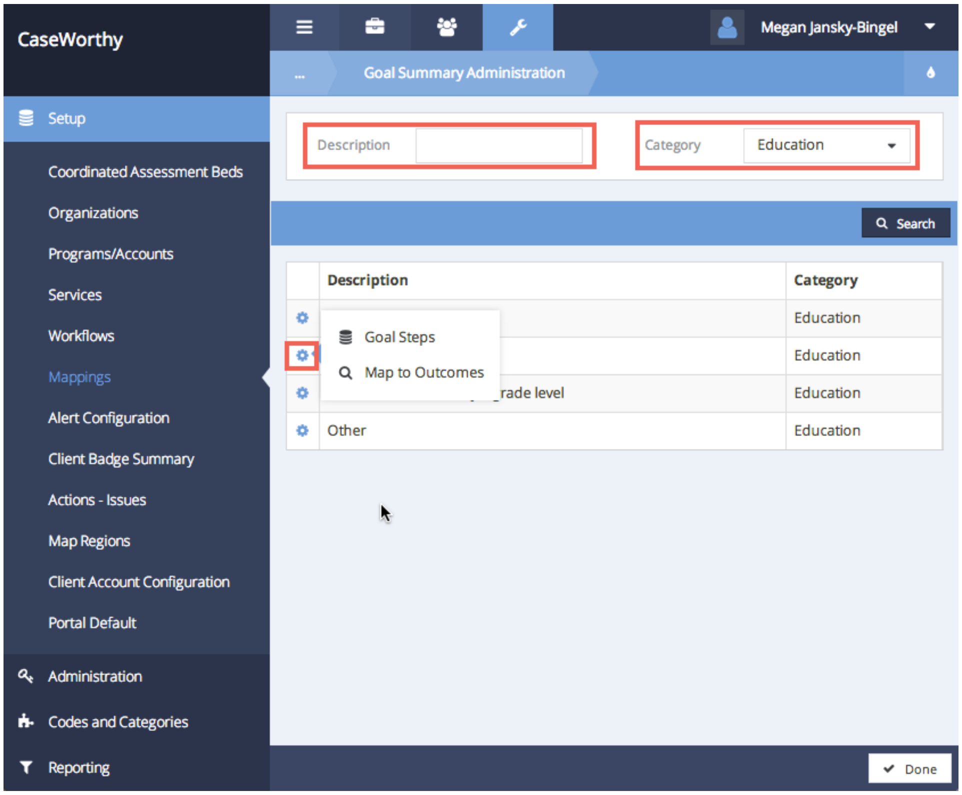
(Administration>Setup>Mappings>Goal Mapping)

Goals can be mapped, or linked, to Goal Steps or Outcomes. Before doing the mapping, first the Goals, Goal Steps and Outcomes must be created. See the Codes and Categories section of this manual for information on how to set them up.

To map Goals, select the "Goal Mapping" icon on the Mappings dashboard.



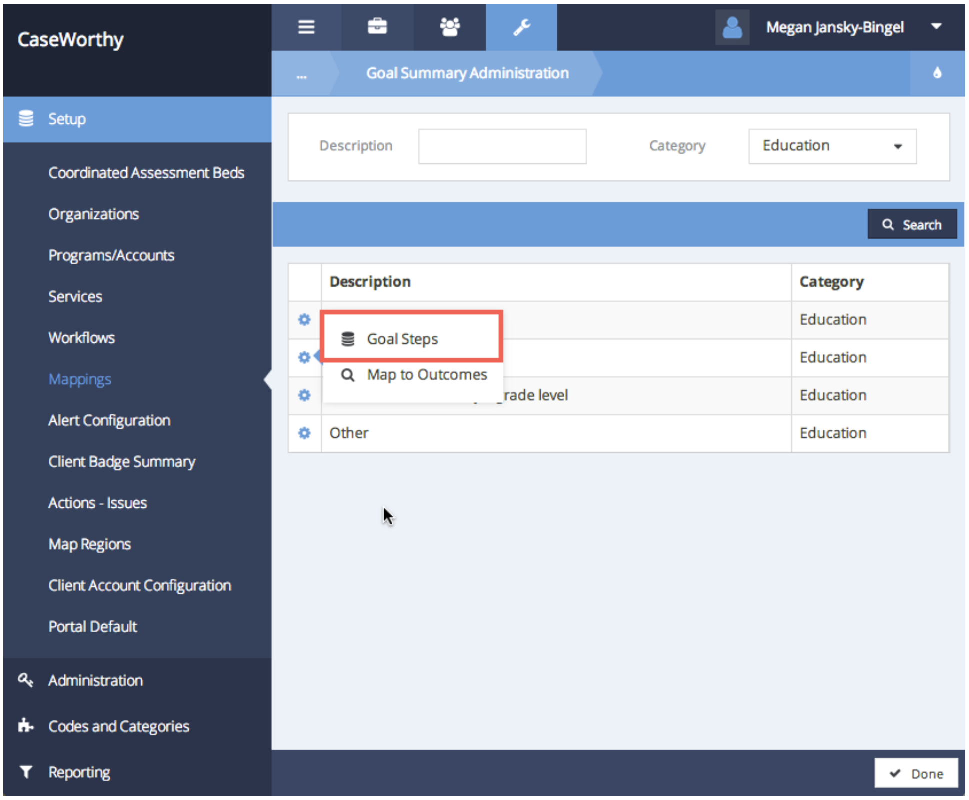
The list of Goals already entered in the system displays. Click on the action gear next to the desired goal to map Goal Steps or Outcomes. Use the Description or Category fields on the top of the form to filter the results displayed on the summary form.



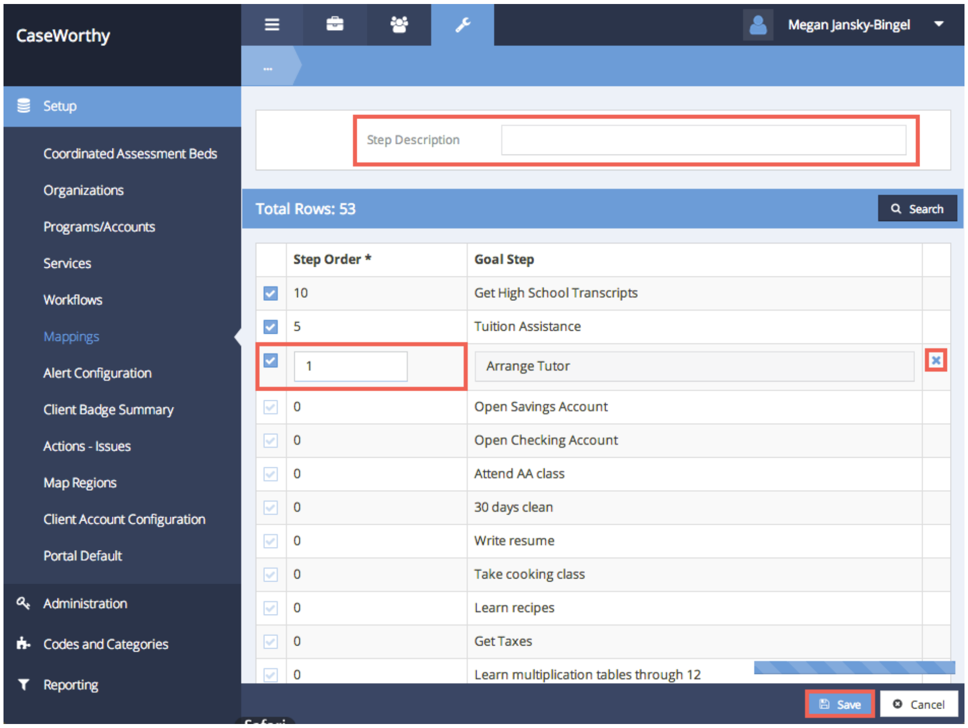
Goal Steps

(Administration>Setup>Mappings>Goal Mapping>Goal Steps)

To map Goals to Goal Steps, click on the action gear next to the desired goal and select “Goal Steps”.



The full list of all Goal Steps that have been entered into the system appears. Use the Step Description field at the top of the form to narrow the results displayed on the form. Select the desired steps by clicking the checkbox. Enter Step Order. To unselect an option, click on the blue X on the far right of the row. Click Save when all desired steps have been selected and ordered.

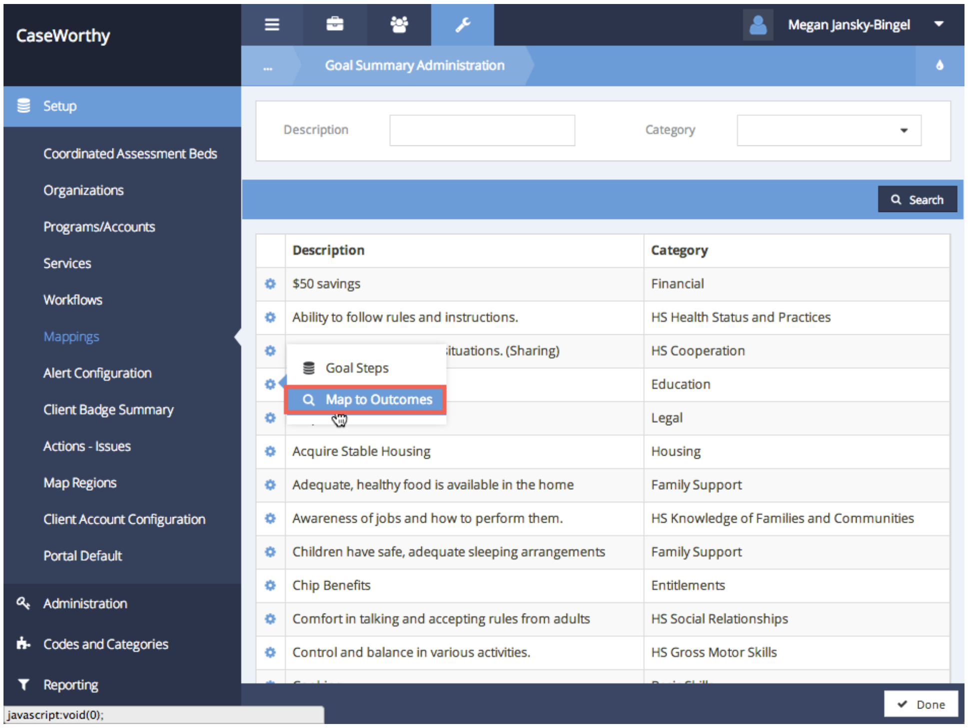


Map to Outcomes

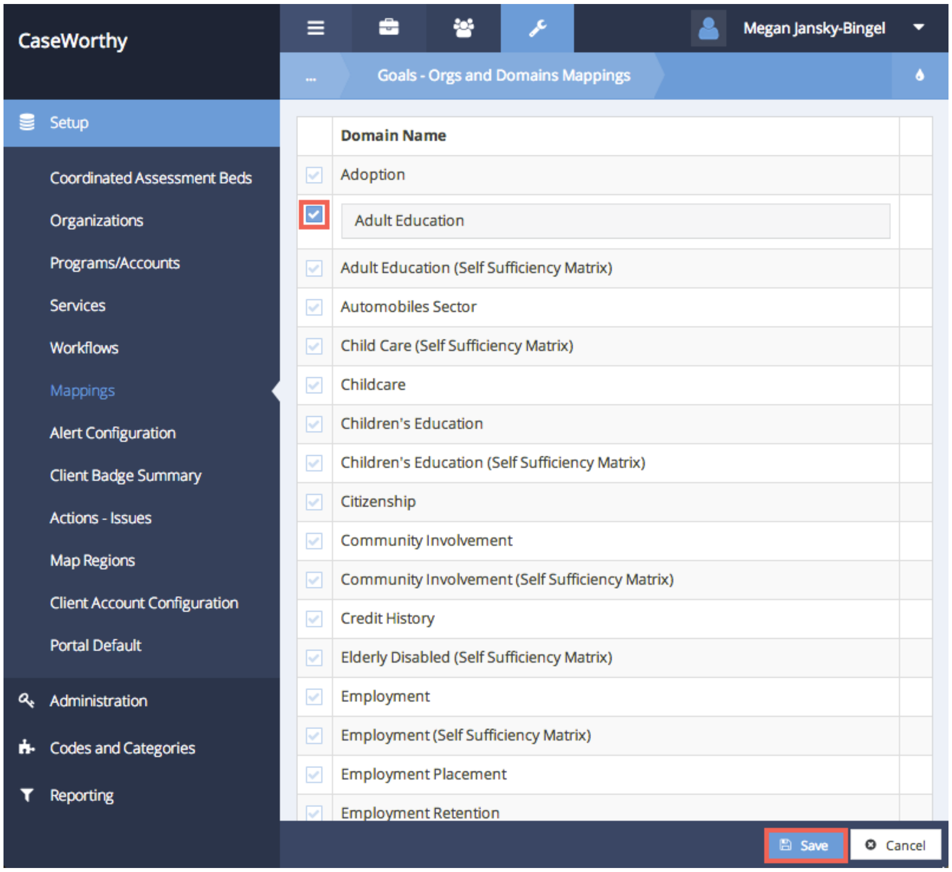
(Administration>Setup>Mappings>Goal Mapping>Map to Outcomes)

Goals can also be mapped to outcomes. This creates a short-cut for users in that once a goal is recorded as completed, any outcome that has been mapped to it can be logged from the Goal action gear rather than having to navigate to the Assessments menu and selecting the Outcomes link.

To map Outcomes to Goals, click on the "Map to Outcomes" link off the action gear next to the desired Goal.



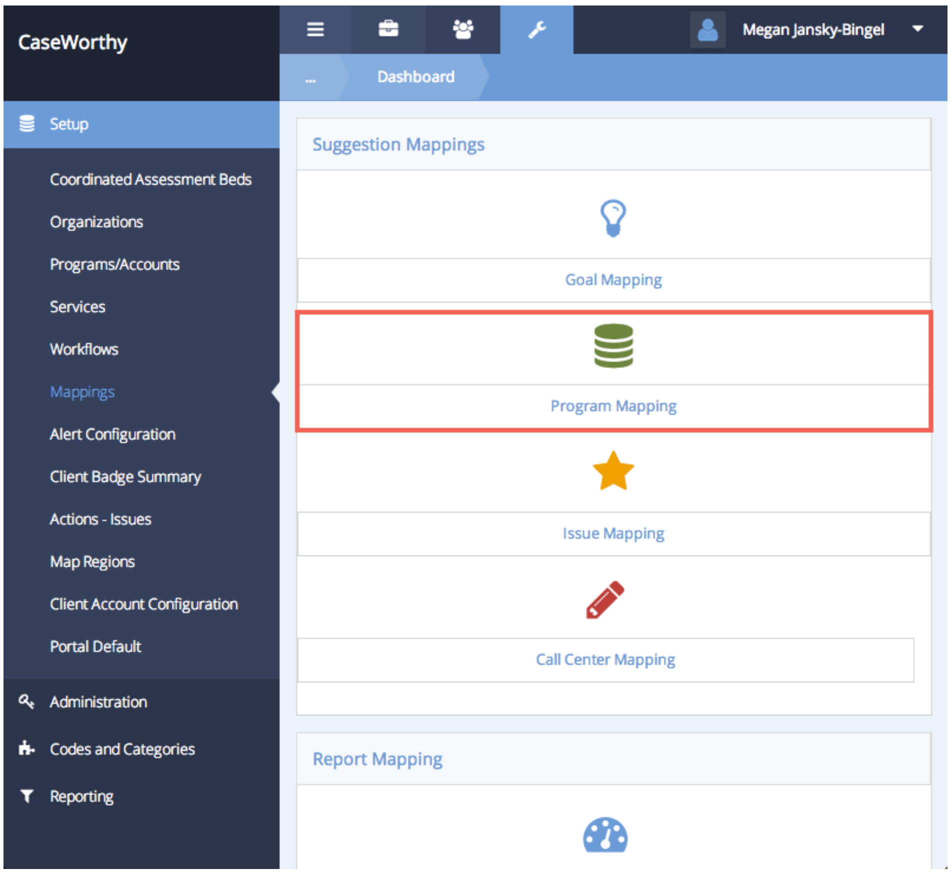
A list of all Outcomes entered into the system displays (To learn more about how to enter Outcomes, go to the Codes and Categories section of this manual.). Click on the clear checkbox next to the Outcome(s) to be linked to the goal. When finished, click the Save button.


CaseWorthy
Megan Jansky-Bingel
...
Goals - Orgs and Domains Mappings
Setup
Coordinated Assessment Beds
Organizations
Programs/Accounts
Services
Workflows
Mappings
Alert Configuration
Client Badge Summary
Actions - Issues
Map Regions
Client Account Configuration
Portal Default
Administration
Codes and Categories
Reporting
Domain Name
Adoption
Adult Education
Adult Education (Self Sufficiency Matrix)
Automobiles Sector
Child Care (Self Sufficiency Matrix)
Childcare
Children's Education
Children's Education (Self Sufficiency Matrix)
Citizenship
Community Involvement
Community Involvement (Self Sufficiency Matrix)
Credit History
Elderly Disabled (Self Sufficiency Matrix)
Employment
Employment (Self Sufficiency Matrix)
Employment Placement
Employment Retention
Save
Cancel

Program Mapping

(Administration>Setup>Mappings>Program Mapping)

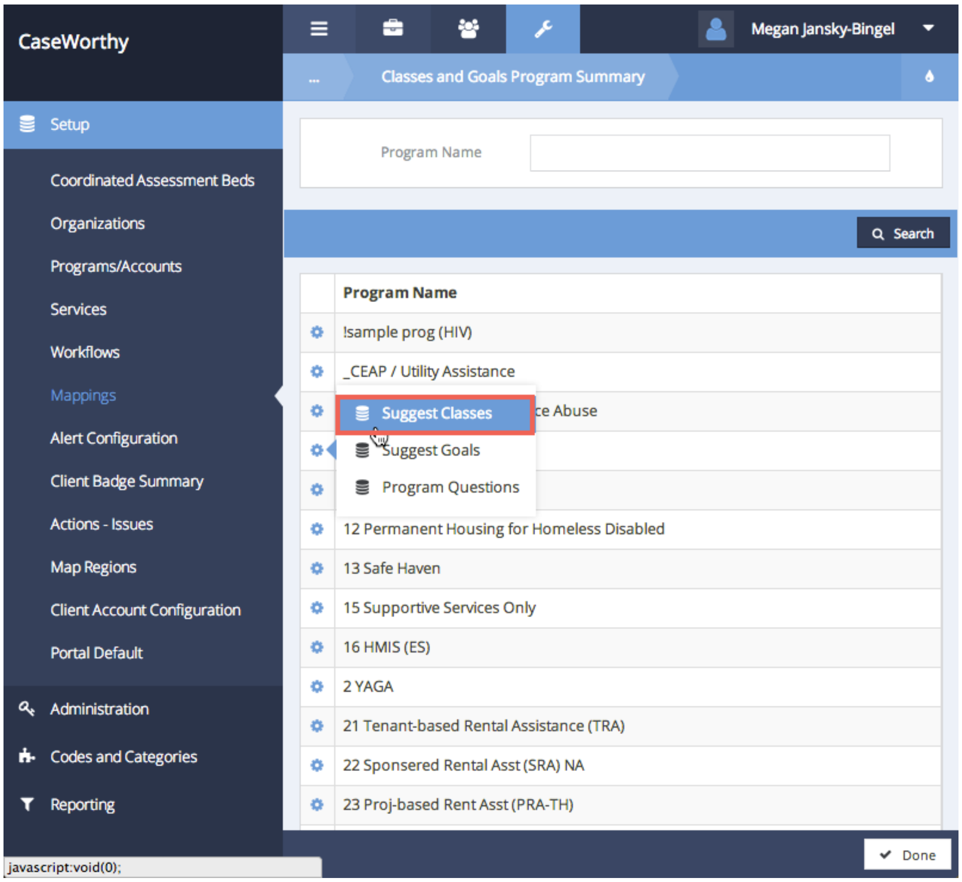
Programs can be mapped (linked) to various tasks/activities within CaseWorthy™. By linking to classes, users can get a list of classes that might be recommended for clients who are enrolled in the program. Linking programs to Goals filters the list of goals a user can select from. Linking to Program Questions allows users to select a series of questions or a survey to present to clients based on their program enrollment. To map programs, select the "Program Mapping" icon on the Mapping dashboard.



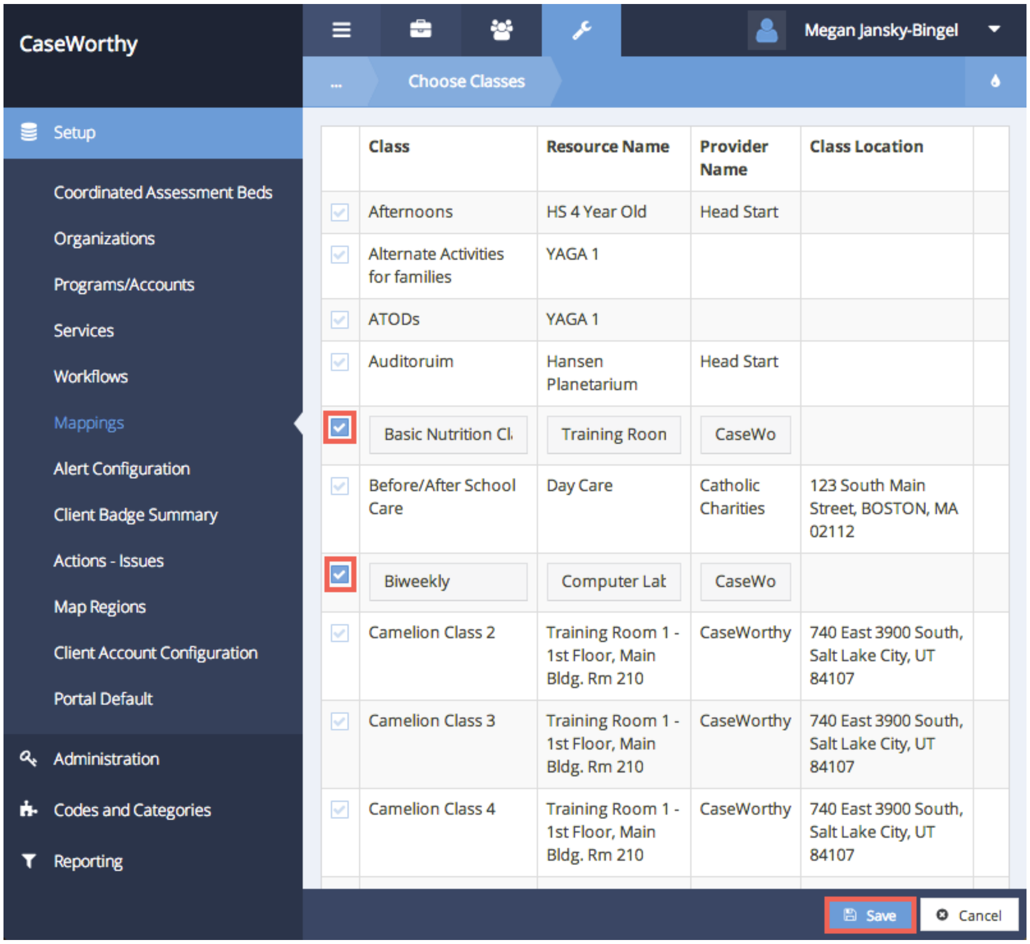
Classes

(Administration>Setup>Mappings>Program Mapping>Suggest Classes)

To map programs to classes, select "Suggest Classes" from the action gear next to the desired program.



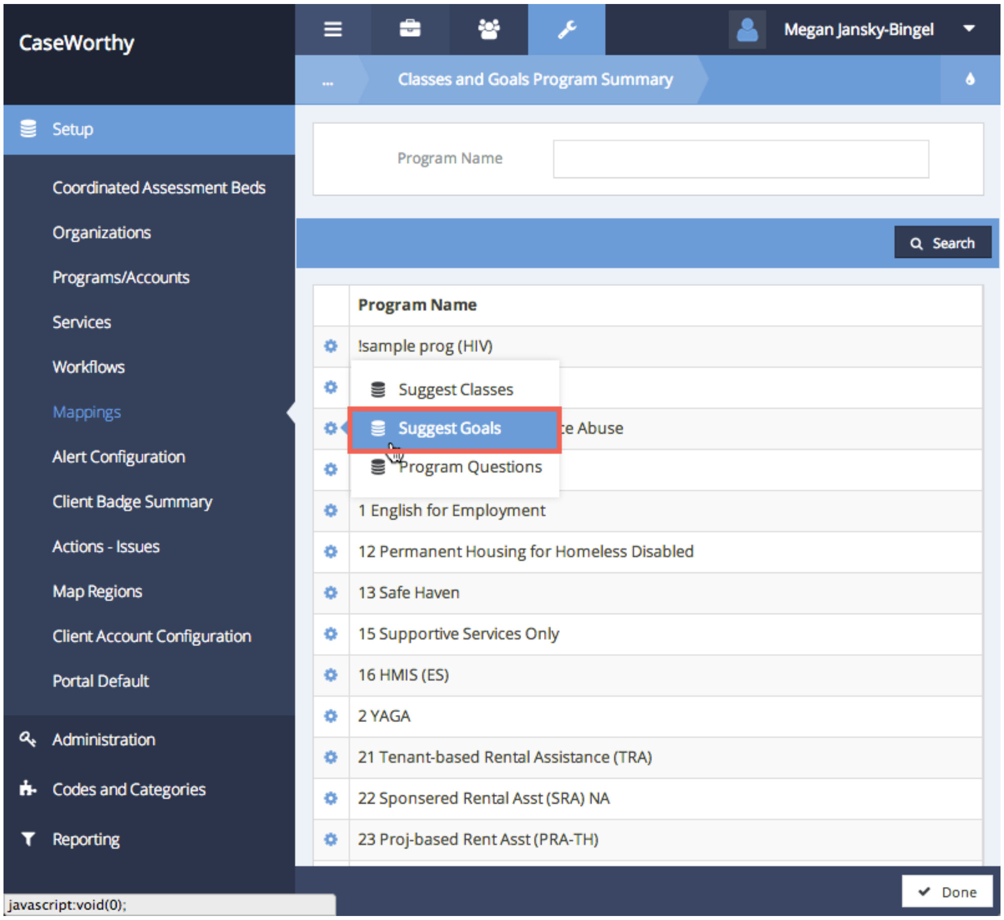
A list of all classes that have been entered into the system displays (To learn more about setting up classes in CaseWorthy™, refer to the Resources and Usages sections of this manual.). Click on the clear checkbox next to any desired classes. Click Save when all relevant classes have been mapped.



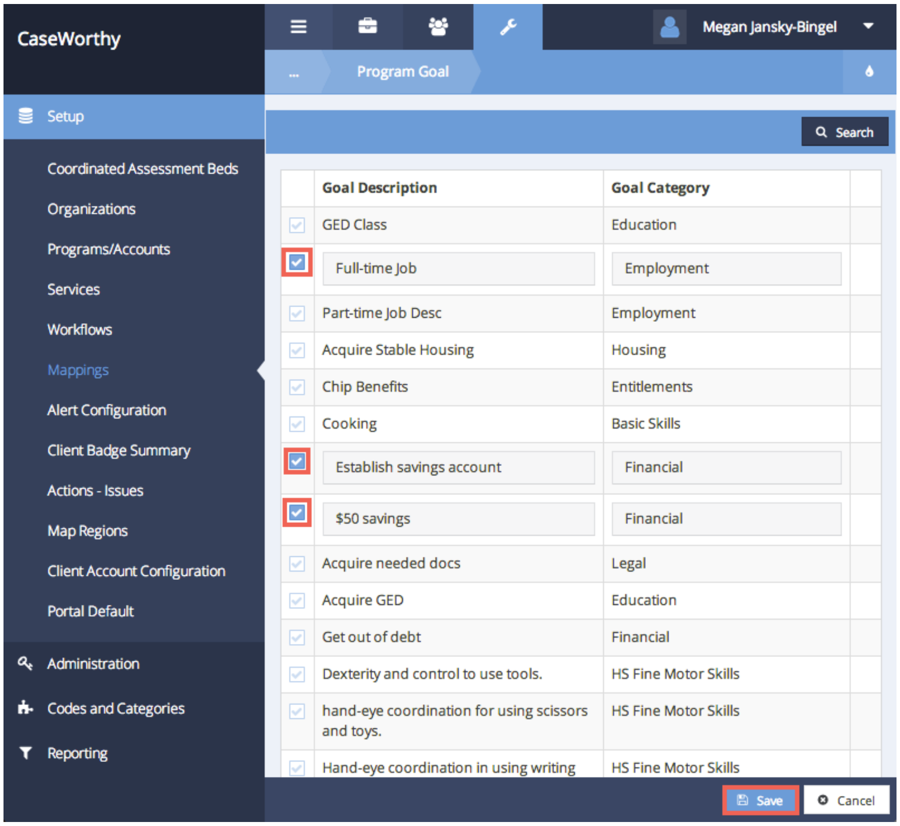
Goals

(Administration>Setup>Mappings>Program Mapping>Goals)

To map Programs to Goals, select “Goals” from the action gear next to the desired program.



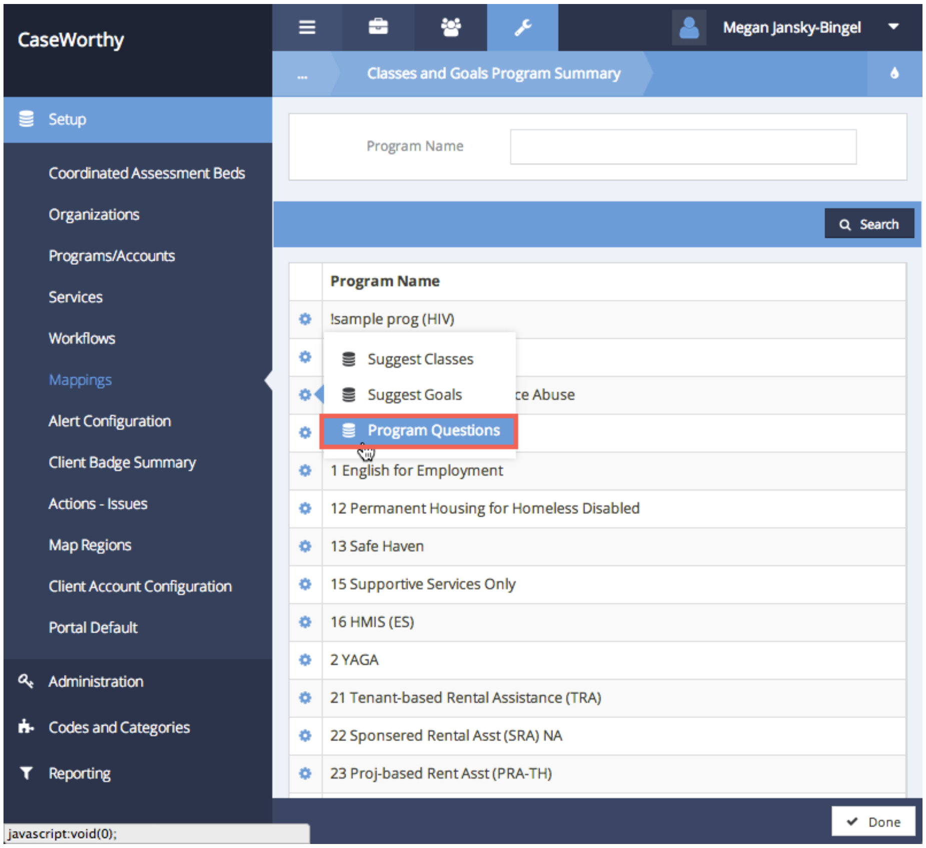
A list of all Goals entered into the system displays (To learn more about creating Goals in CaseWorthy™, see the Codes and Categories section of this manual.). Click on the clear checkbox next to the Goal(s) to be mapped to the program. Click Save when all desired Goals have been linked.



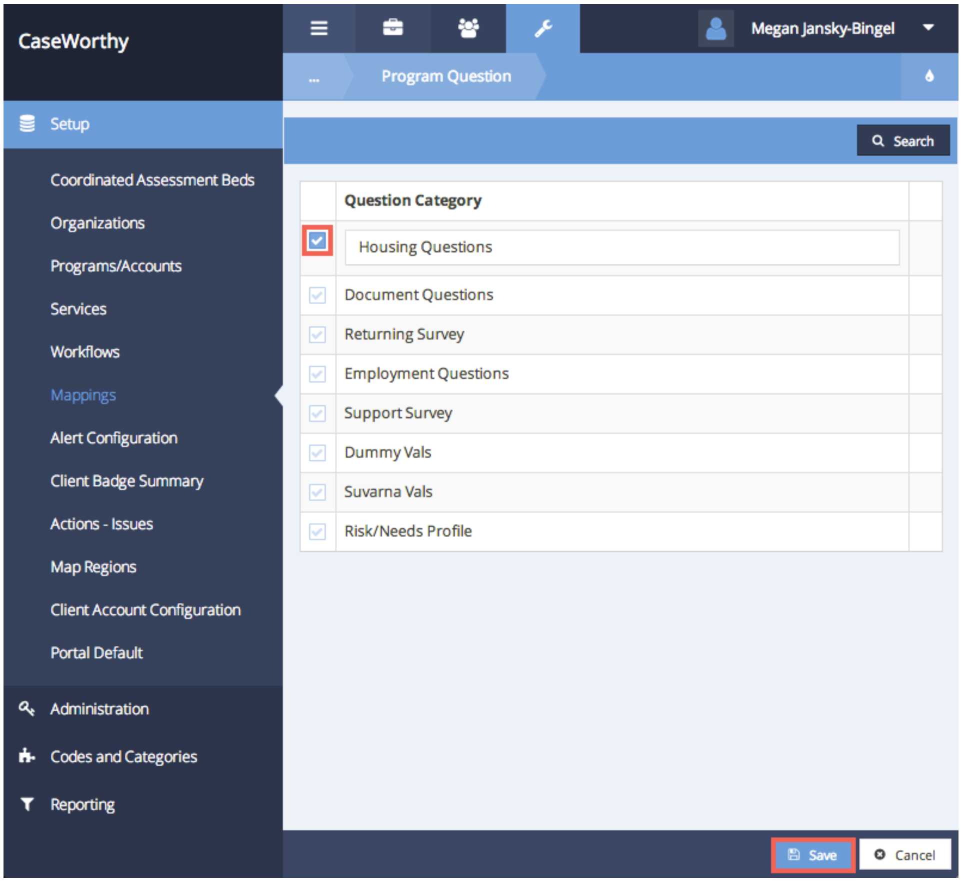
Program Questions

(Administration>Setup>Mappings>Program Mapping>Program Questions)

To map Programs to Program Questions, select "Program Questions" from the action gear next to the desired program.



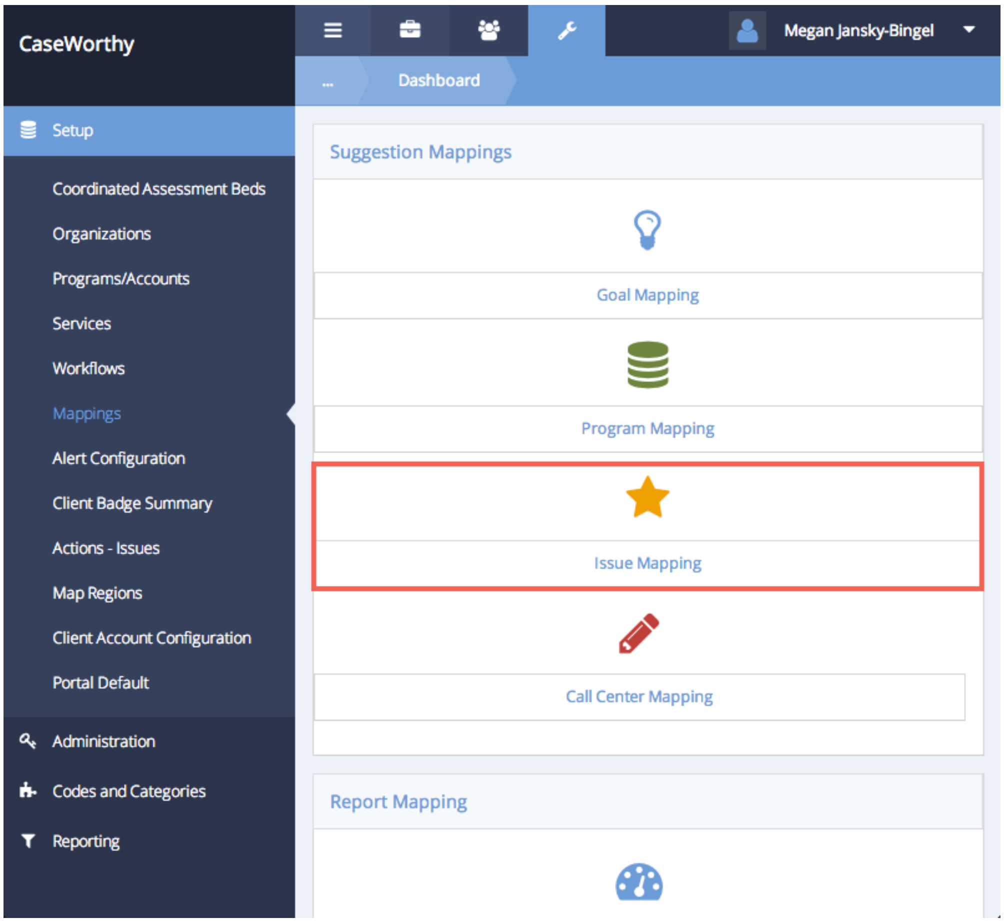
A list of all Program Questions that have been entered into the system appears (To learn more about creating Program Questions in CaseWorthy™, see the Codes and Categories section of this manual.). Click on the clear button next to the relevant question category. Click Save when done.

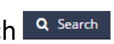

CaseWorthy
Megan Jansky-Bingel
Program Question
Setup
Search
Coordinated Assessment Beds
Organizations
Programs/Accounts
Services
Workflows
Mappings
Alert Configuration
Client Badge Summary
Actions - Issues
Map Regions
Client Account Configuration
Portal Default
Administration
Codes and Categories
Reporting
Question Category
Housing Questions
Document Questions
Returning Survey
Employment Questions
Support Survey
Dummy Vals
Suvarna Vals
Risk/Needs Profile
Save
Cancel

Issue Mapping

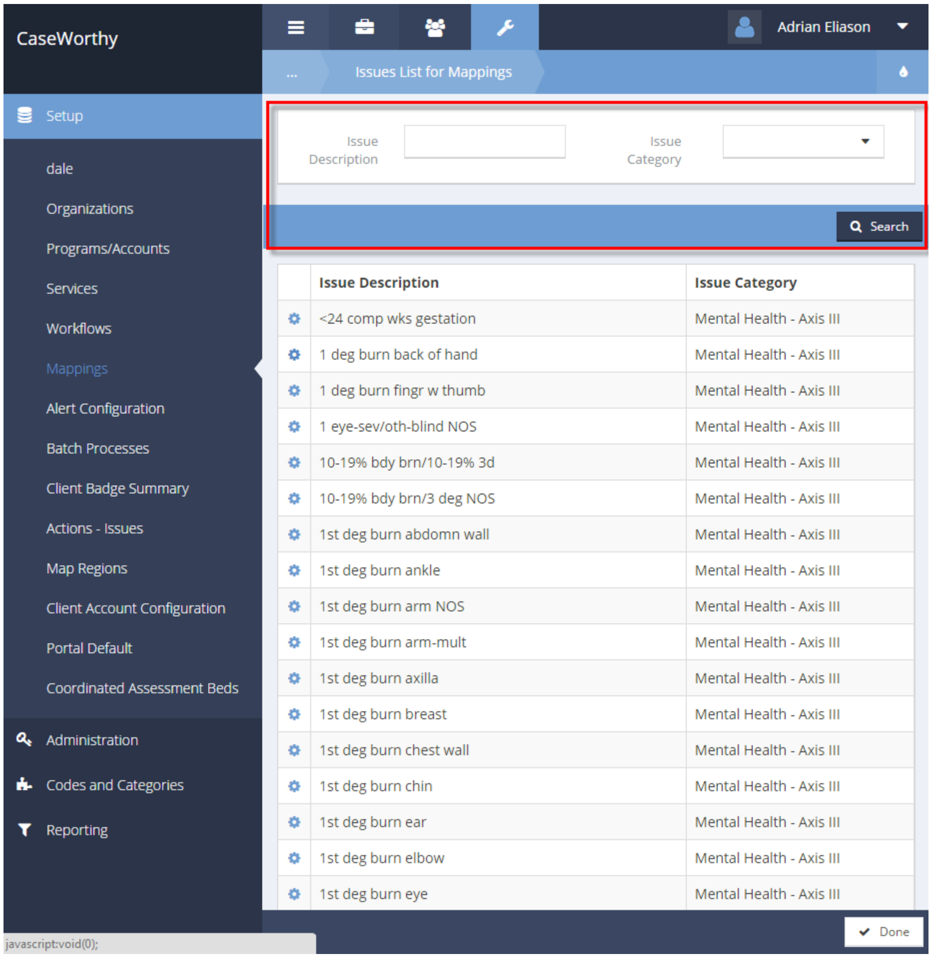
(Administration>Setup>Mappings>Issue Mapping)

Issues may be mapped to specific goals, programs, and referral services. To complete issue mapping, select the “Issue Mapping” icon on the Mapping dashboard.



To locate an issue, enter a keyword in the Issue Description field and click the search 

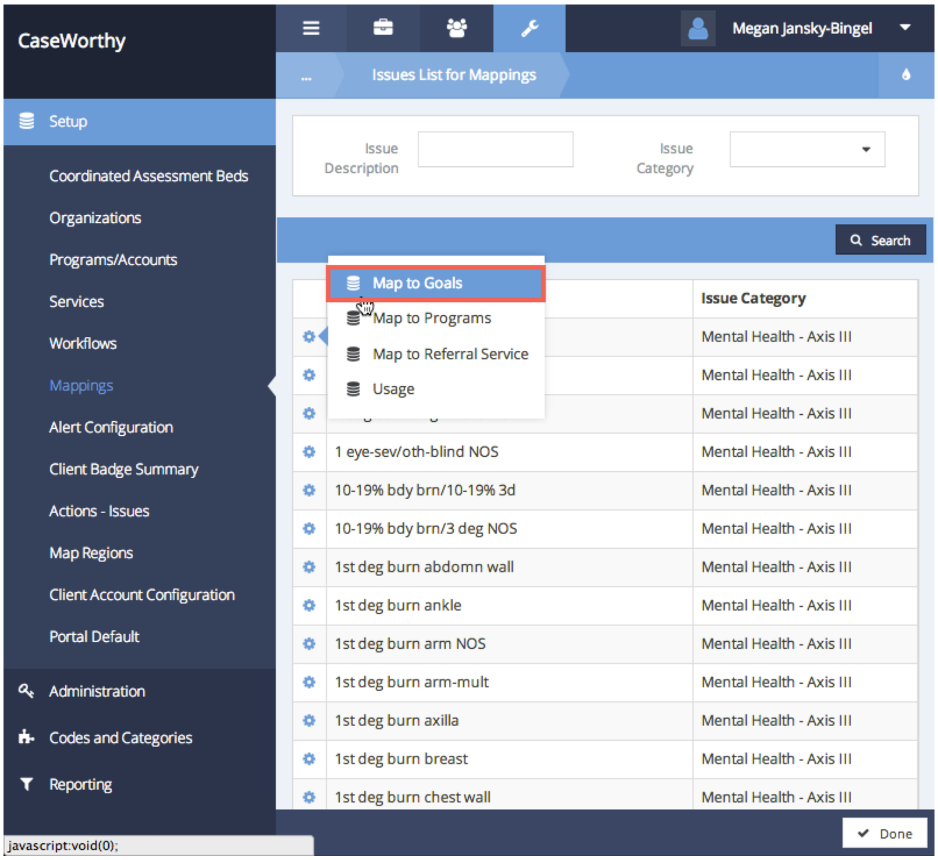
button. Alternatively, a category may be chosen in the Issue Category dropdown box. All relevant issues now display in the list.


CaseWorthy
Adrian Eliason
Issues List for Mappings
Setup
dale
Organizations
Programs/Accounts
Services
Workflows
Mappings
Alert Configuration
Batch Processes
Client Badge Summary
Actions - Issues
Map Regions
Client Account Configuration
Portal Default
Coordinated Assessment Beds
Administration
Codes and Categories
Reporting
Issue Description
Issue Category
Search
Issue Description | Issue Category
<24 comp wks gestation | Mental Health - Axis III
1 deg burn back of hand | Mental Health - Axis III
1 deg burn fingr w thumb | Mental Health - Axis III
1 eye-sev/oth-blind NOS | Mental Health - Axis III
10-19% bdy brn/10-19% 3d | Mental Health - Axis III
10-19% bdy brn/3 deg NOS | Mental Health - Axis III
1st deg burn abdomn wall | Mental Health - Axis III
1st deg burn ankle | Mental Health - Axis III
1st deg burn arm NOS | Mental Health - Axis III
1st deg burn arm-mult | Mental Health - Axis III
1st deg burn axilla | Mental Health - Axis III
1st deg burn breast | Mental Health - Axis III
1st deg burn chest wall | Mental Health - Axis III
1st deg burn chin | Mental Health - Axis III
1st deg burn ear | Mental Health - Axis III
1st deg burn elbow | Mental Health - Axis III
1st deg burn eye | Mental Health - Axis III
Done
javascript:void(0);

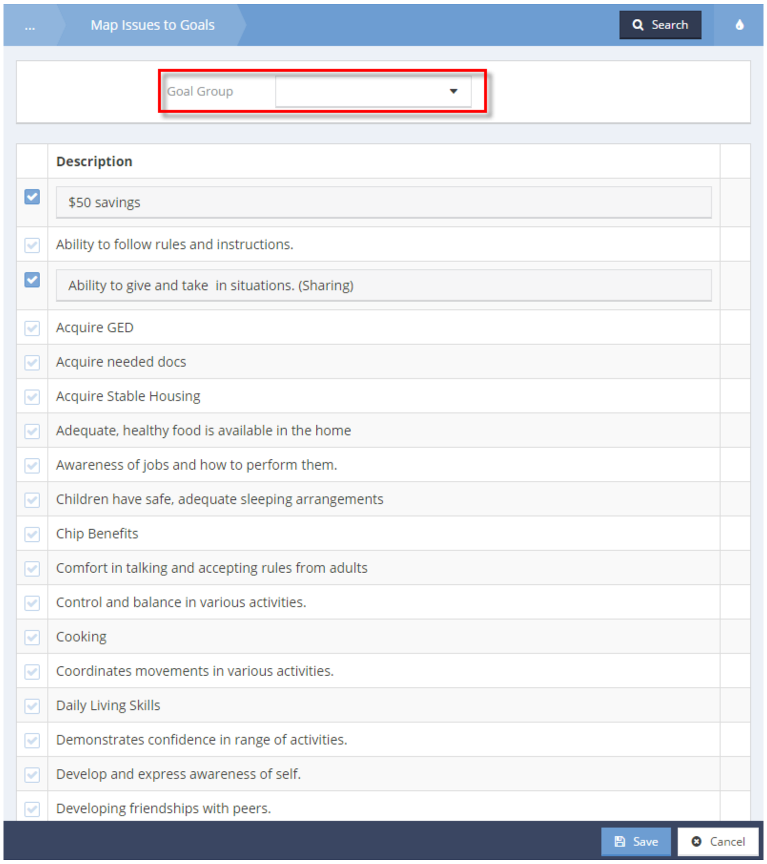
Map to Goals

(Administration>Setup>Mappings>Issue Mapping>Map to Goals)

To map an issue to Goals, first click the action gear next to the issue and select Map to Goals.



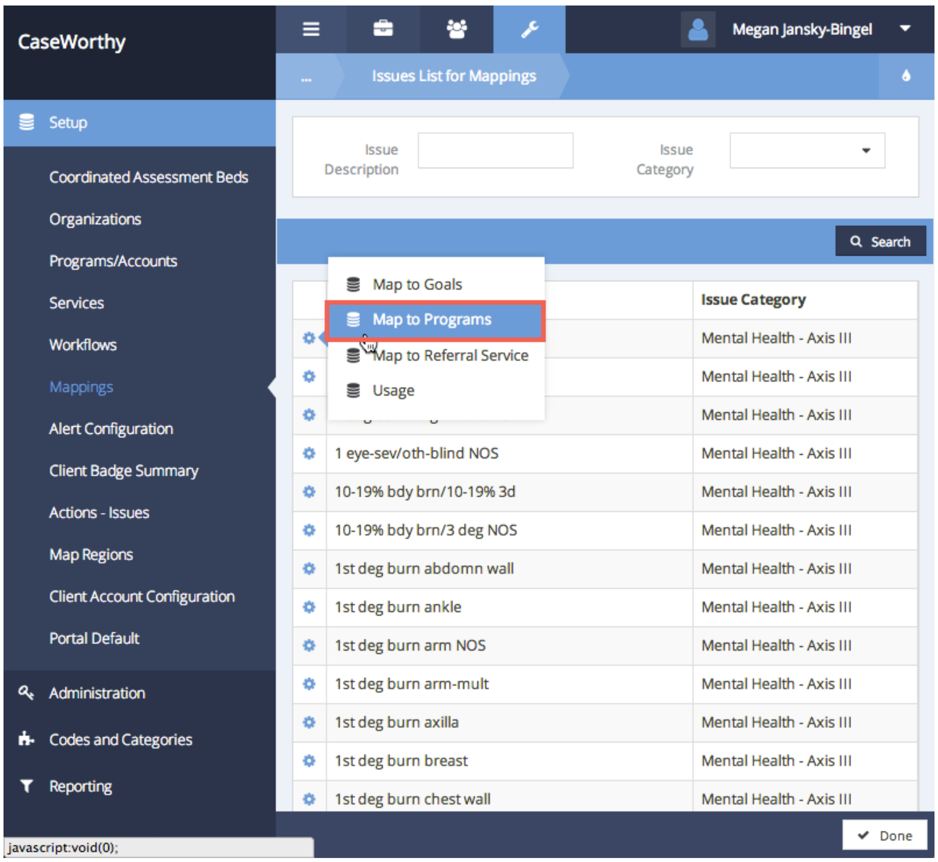
To assign a goal to the issue, select a group from the Goal Group drop down box and then click the clear checkbox next to the desired goal. Click Save when done.


...
Map Issues to Goals
Search
Goal Group
Description
$50 savings
Ability to follow rules and instructions.
Ability to give and take in situations. (Sharing)
Acquire GED
Acquire needed docs
Acquire Stable Housing
Adequate, healthy food is available in the home
Awareness of jobs and how to perform them.
Children have safe, adequate sleeping arrangements
Chip Benefits
Comfort in talking and accepting rules from adults
Control and balance in various activities.
Cooking
Coordinates movements in various activities.
Daily Living Skills
Demonstrates confidence in range of activities.
Develop and express awareness of self.
Developing friendships with peers.
Save
Cancel

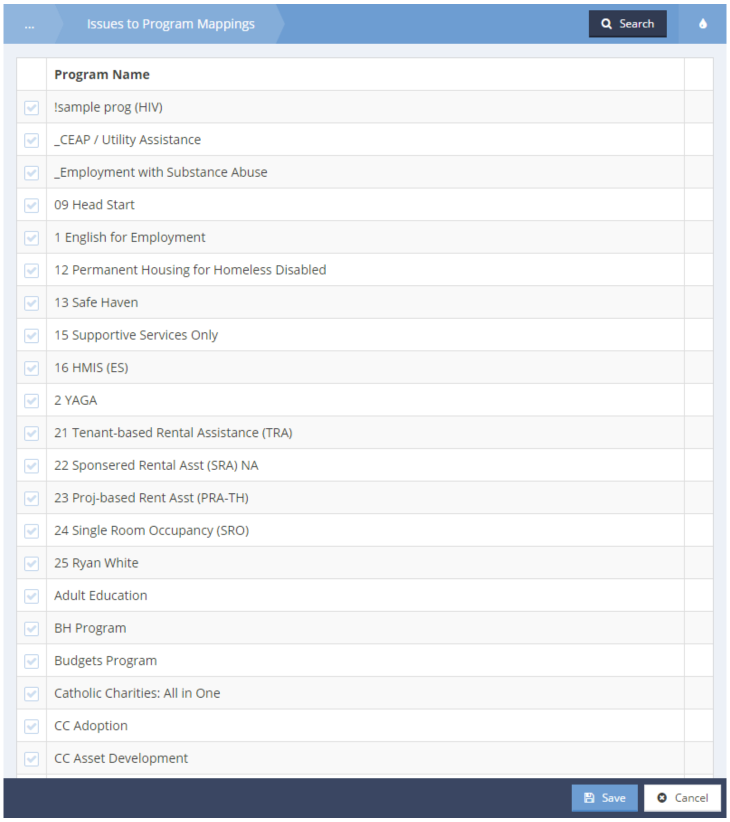
Map to Programs

(Administration>Setup>Mappings>Issue Mapping>Map to Programs)

To map an issue to Programs, first click the action gear next to the issue and select Map to Programs.



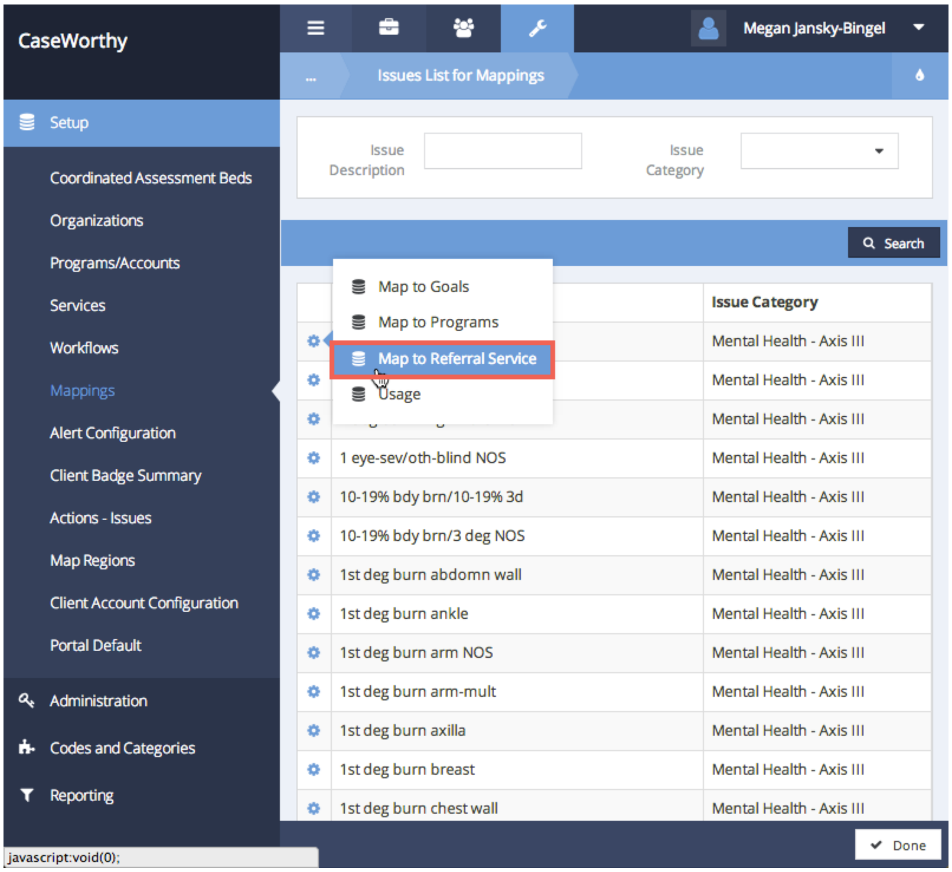
To assign a program to the issue, click the clear checkbox next to the desired program. Click Save when done.


...
Issues to Program Mappings
Search
Program Name
!sample prog (HIV)
_CEAP / Utility Assistance
_Employment with Substance Abuse
09 Head Start
1 English for Employment
12 Permanent Housing for Homeless Disabled
13 Safe Haven
15 Supportive Services Only
16 HMIS (ES)
2 YAGA
21 Tenant-based Rental Assistance (TRA)
22 Sponsered Rental Asst (SRA) NA
23 Proj-based Rent Asst (PRA-TH)
24 Single Room Occupancy (SRO)
25 Ryan White
Adult Education
BH Program
Budgets Program
Catholic Charities: All in One
CC Adoption
CC Asset Development
Save
Cancel

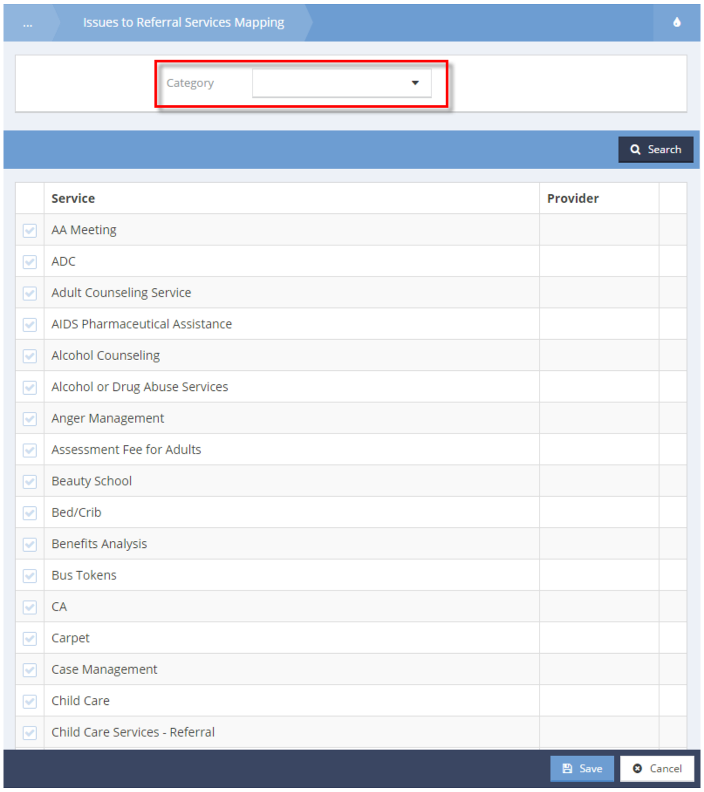
Map to Referral Service

(Administration>Setup>Mappings>Issue Mapping>Map to Referral Service)

To map an issue to a Referral Service, first click the action gear next to the issue and select Map to Referral Service.



To add a referral service, select a category from the Category drop down box and then click the clear checkbox next to the desired Referral Service. Click Save when done.

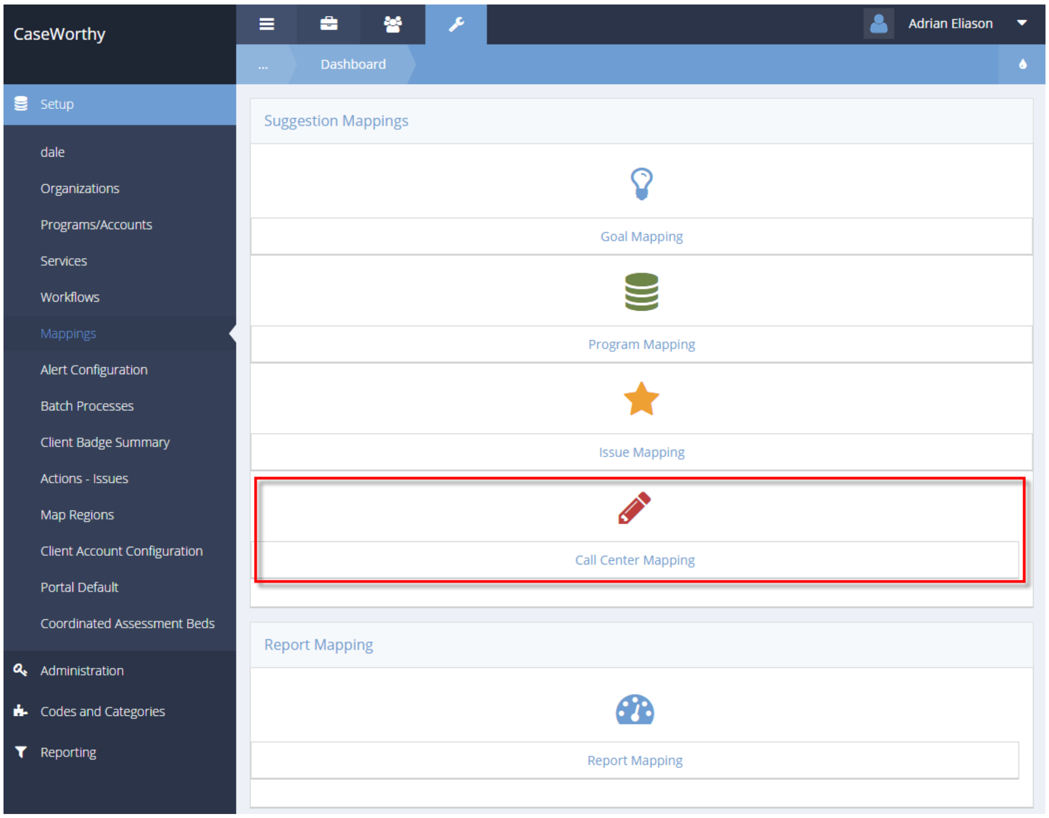


Issues to Referral Services Mapping
Category
Search
Service
Provider
AA Meeting
ADC
Adult Counseling Service
AIDS Pharmaceutical Assistance
Alcohol Counseling
Alcohol or Drug Abuse Services
Anger Management
Assessment Fee for Adults
Beauty School
Bed/Crib
Benefits Analysis
Bus Tokens
CA
Carpet
Case Management
Child Care
Child Care Services - Referral
Save
Cancel

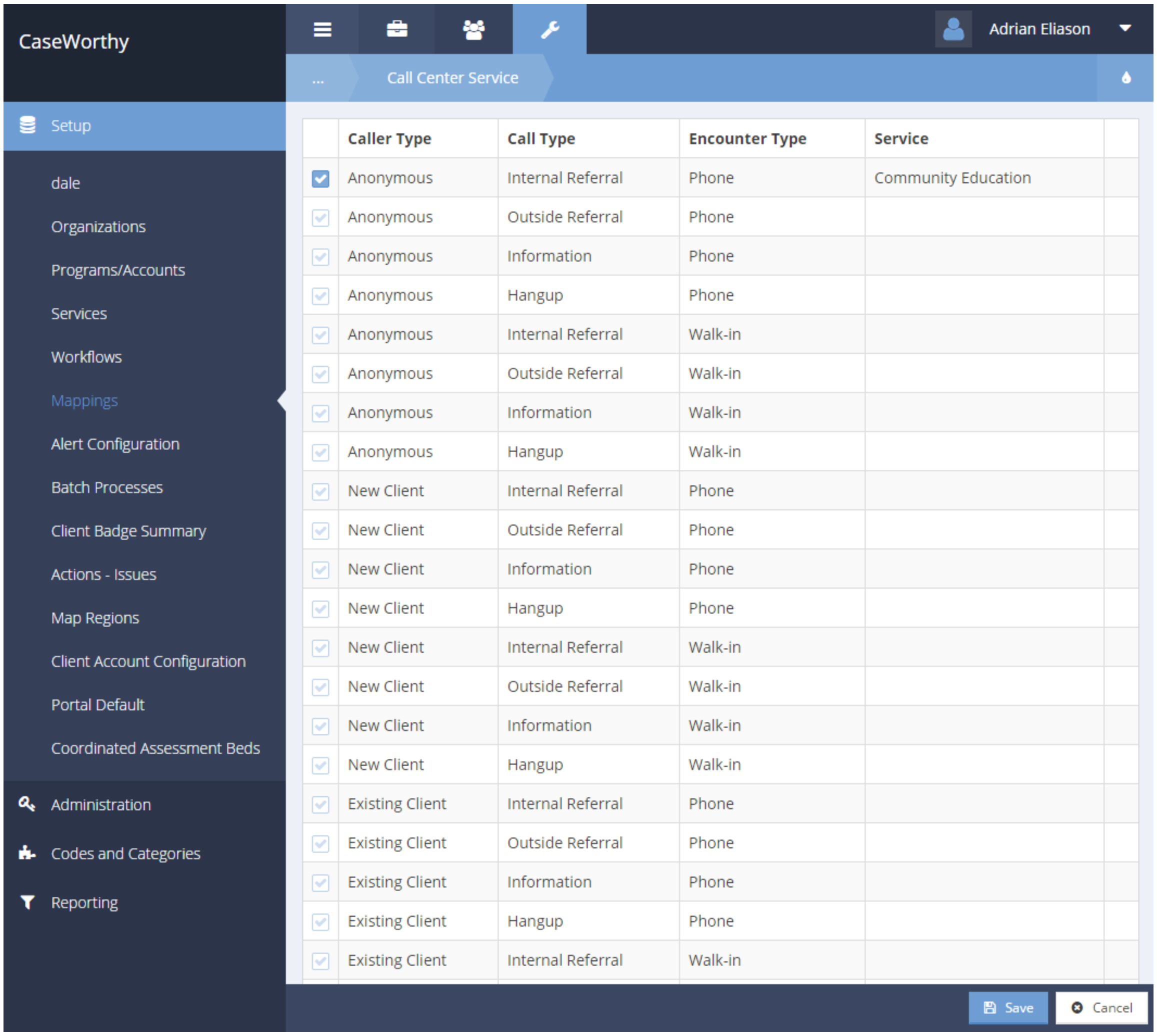
Call Center Mapping

(Administration>Setup>Mappings>Call Center Mapping)

To complete Call Center Mapping, select the Call Center Mapping icon on the Mapping dashboard.



Click the checkbox next to the call the service should be mapped to. Calls that are already mapped have a blue checkbox .

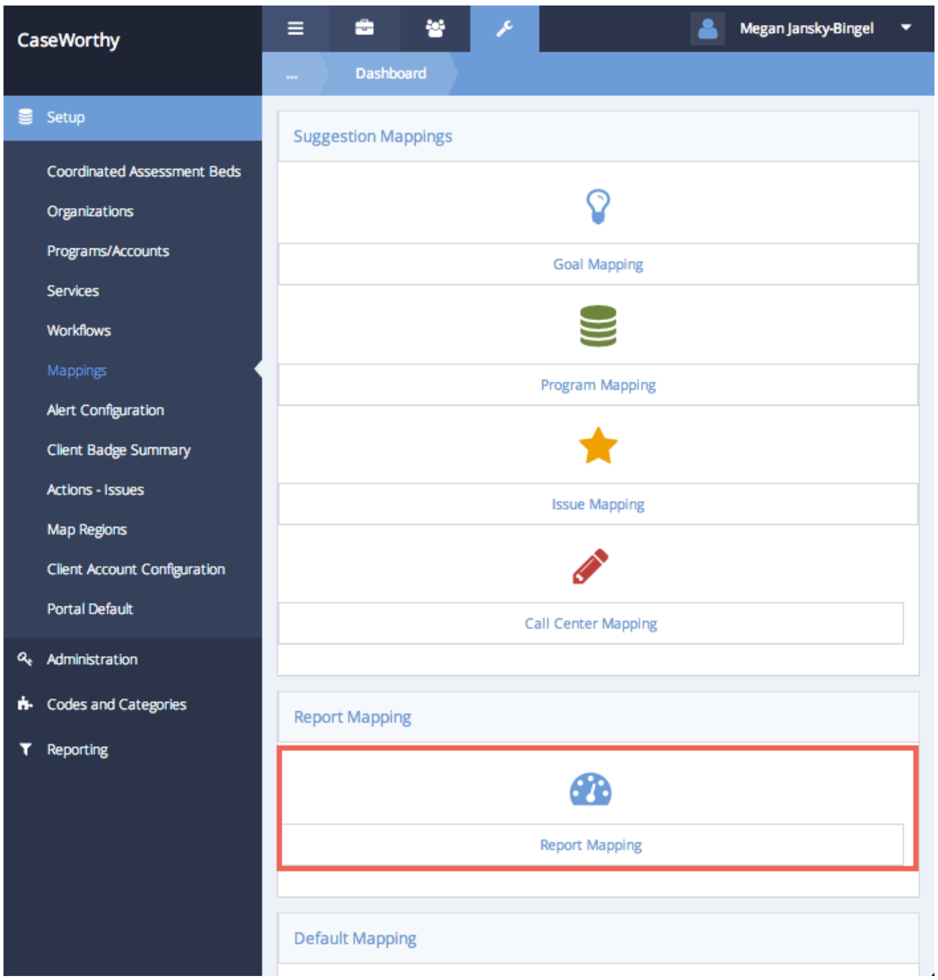


Click on the drop-down box that appears under Service and select a service to map to a call.

Report Mapping

(Administration>Setup>Mappings>Report Mapping)

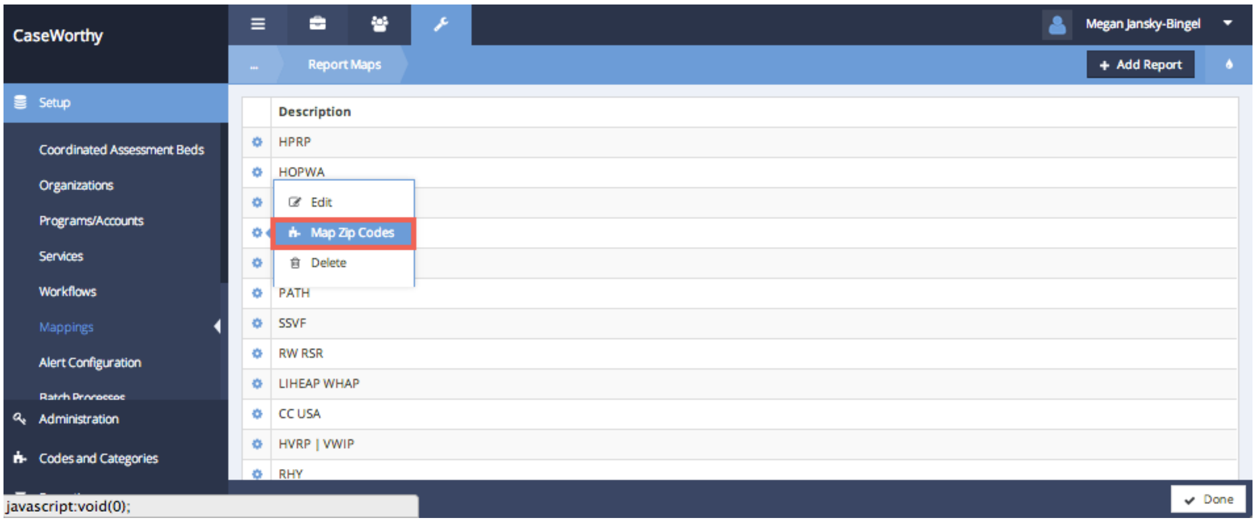
Many of the baseline reports in CaseWorthy™ require mapping. This allows organizations to link their services and/or issues to specific categories within the corresponding baseline report. To complete report mapping, select the "Report Mapping" icon on the Mapping dashboard.



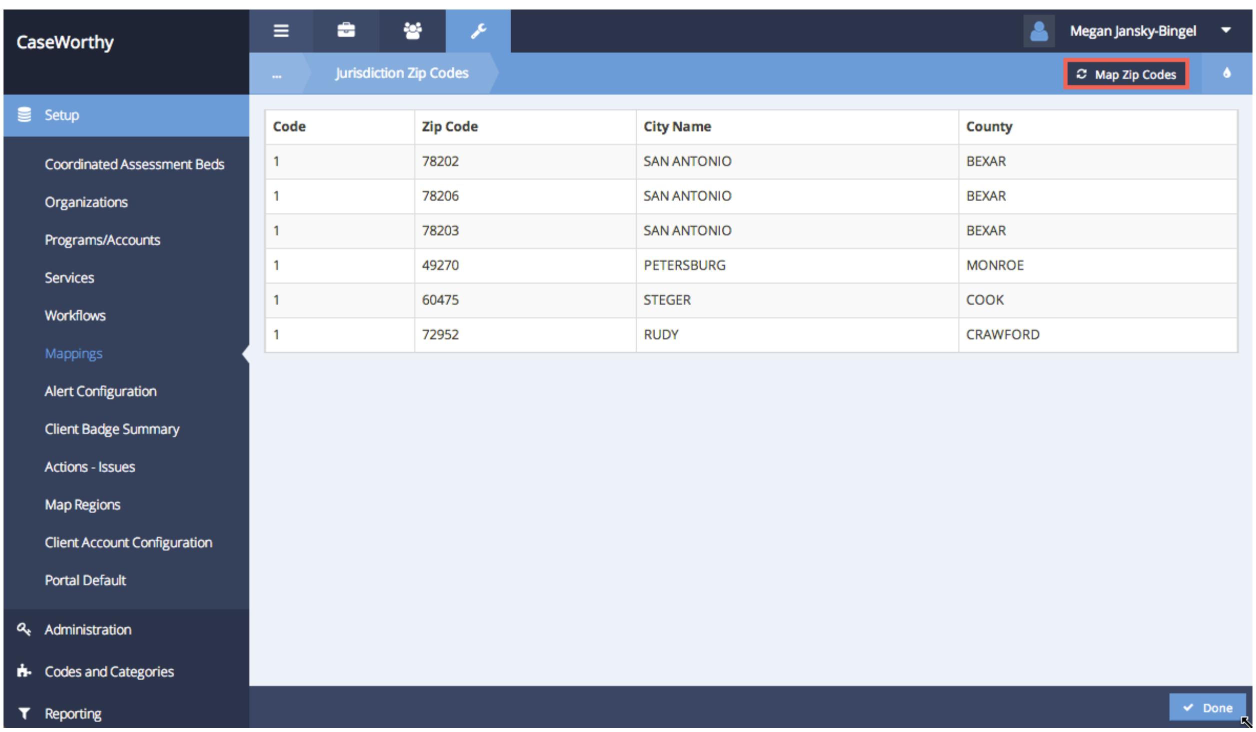
Map Zip Codes

(Administration>Setup>Mappings>Report Mapping>Map Zip Codes)

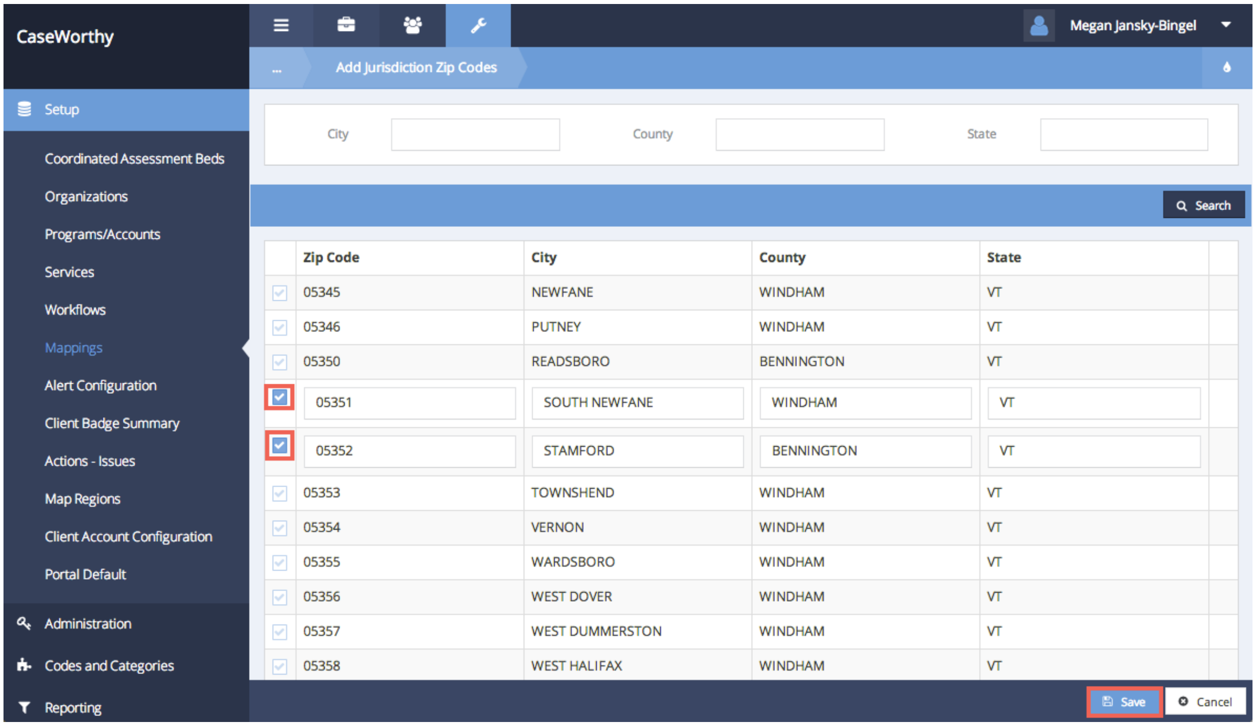
The AHAR also requires zip codes to be mapped. To map zip codes to the AHAR report, select "Map Zip Codes" from the action gear next to "AHAR".



The Jurisdiction Zip Codes form displays. To add a zip code, click the "Map Zip Codes" button on the top right.



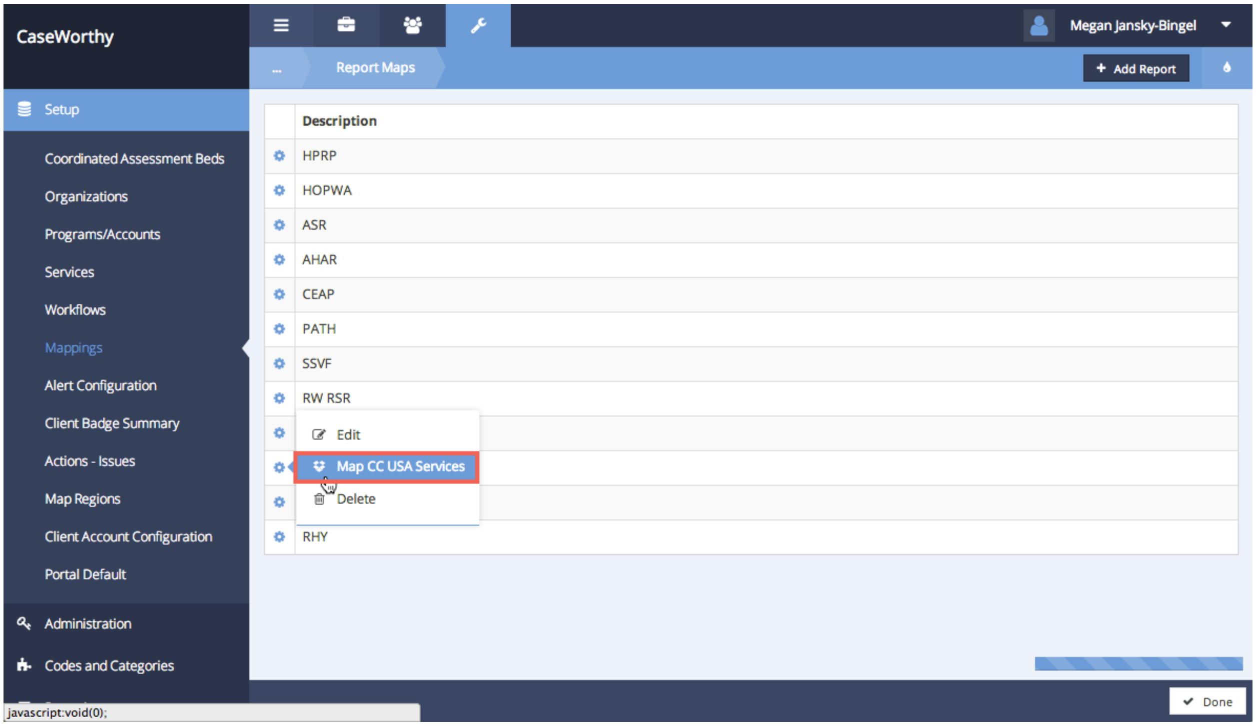
The list of all zip codes entered into the system displays (To learn more about adding zip codes to CaseWorthy™, refer to the Codes and Categories section of this manual.). To map zip codes, click on the clear button next to the relevant codes. When all desired selections have been made, click the Save button.



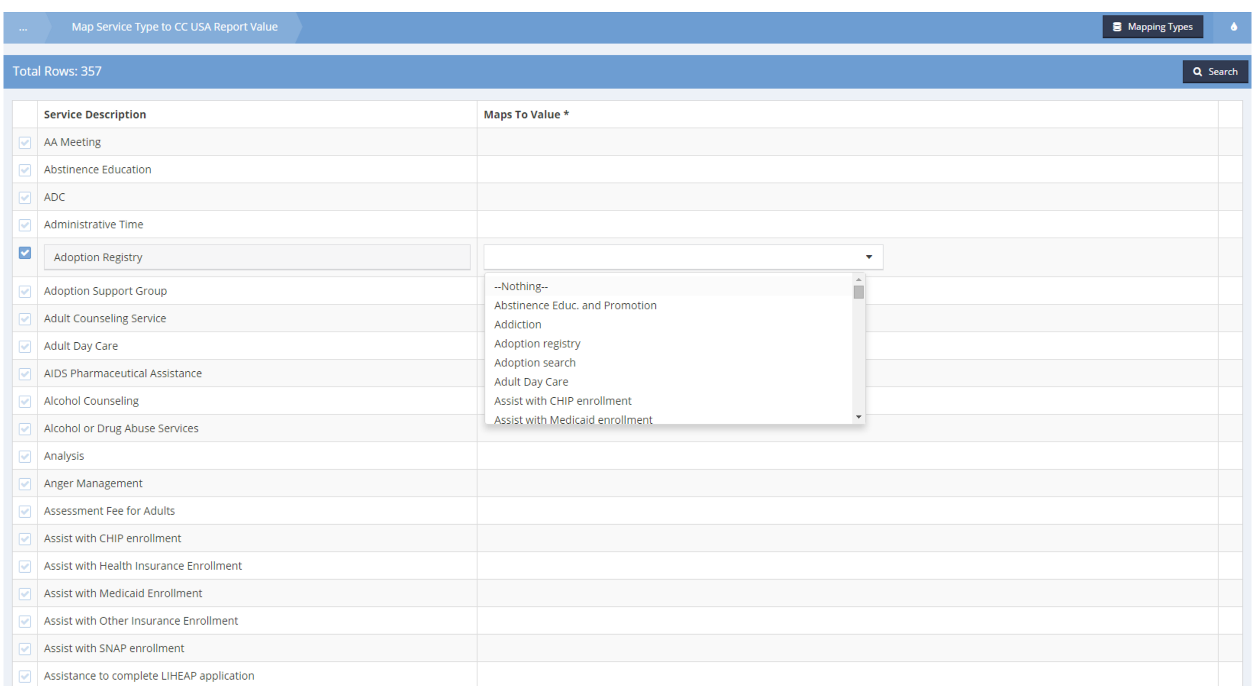
Map Services

(Administration>Setup>Mappings>Report Mapping>Map Services)

Several baseline reports in the system require services to be mapped (such as the CC USA, CEAP, and HMIS). To map services to these reports, click on the action gear next to the desired report and select "Map Services.



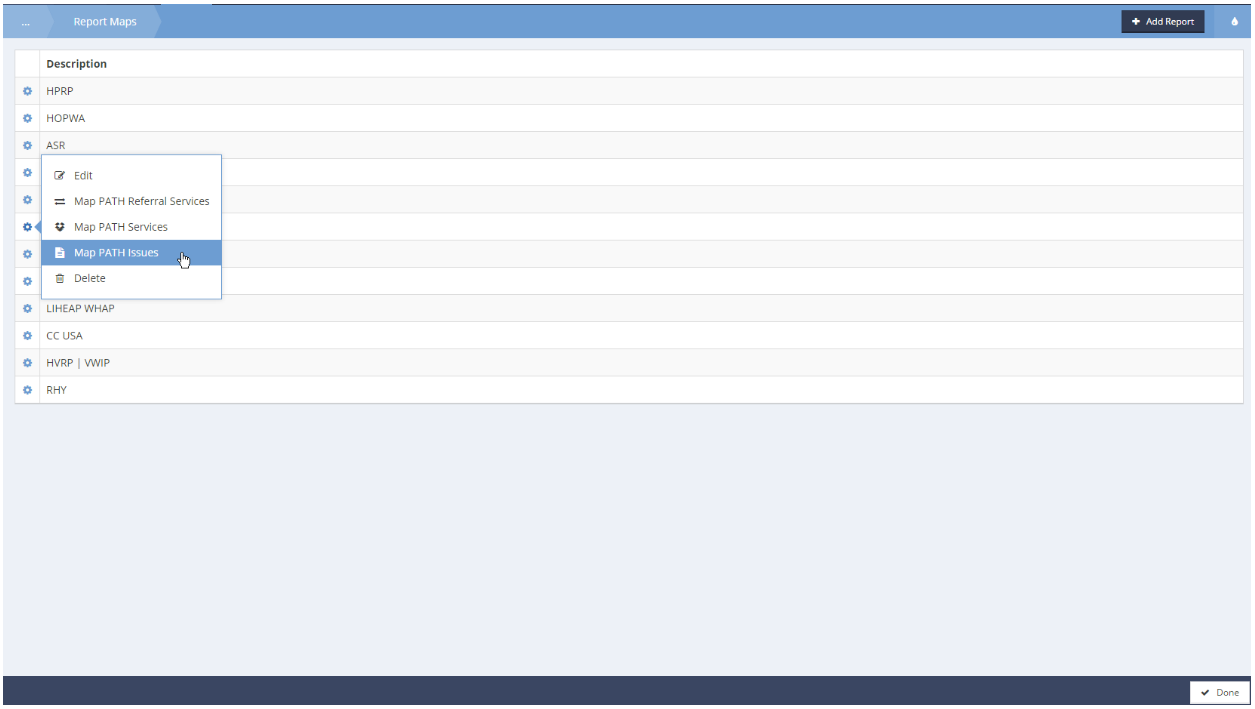
A list of all the services entered into the system displays (To learn more about creating services in CaseWorthy™, refer to the Services section of this manual.). To map a service, click on the clear checkbox next to the desired service(s). Use the drop-down list to link the CaseWorthy™ service to the appropriate report category. The category list is different for each individual baseline report as it is specific to the report criteria. When all relevant services have been selected and linked, click the Save button.



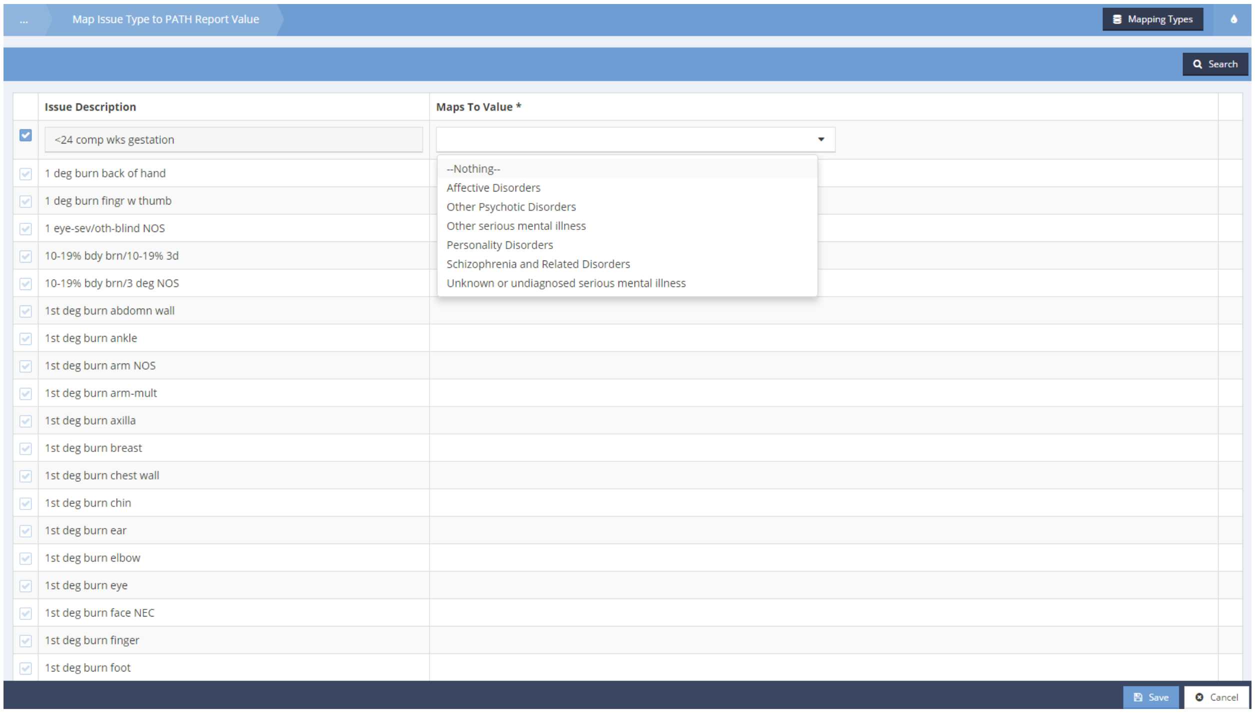
Map Issues

(Administration>Setup>Mappings>Report Mapping>Map Zip Codes)

Several baseline reports in the system require issues to be mapped (such as the CC USA and HMIS). To map issues to these reports, click on the action gear next to the desired report and select "Map PATH Issues".

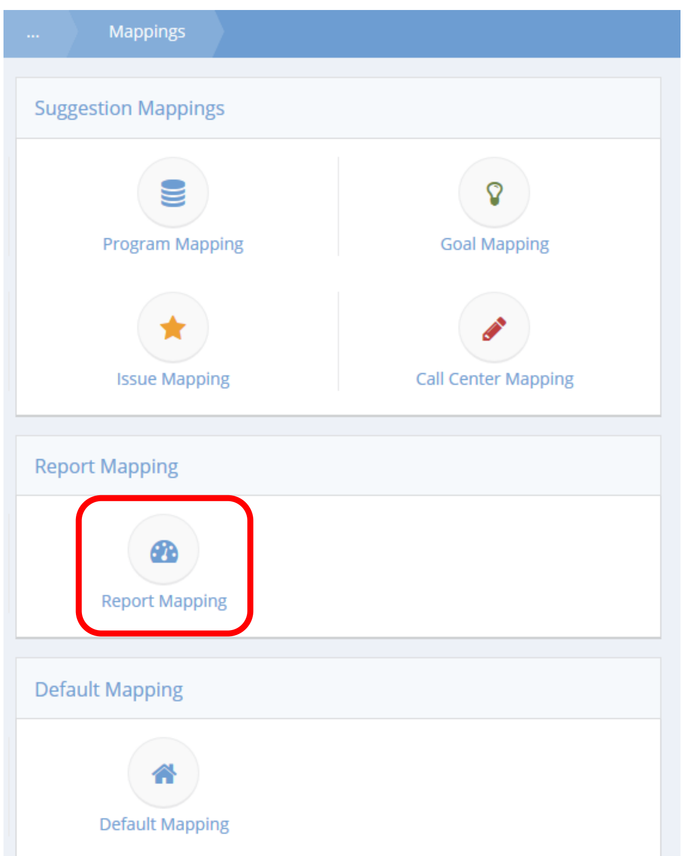


A list of all the issues entered into the system displays (To learn more about creating issues in CaseWorthy™, refer to the Codes and Categories section of this manual.). To map an issue, click on the clear checkbox next to the desired issue(s). Use the drop-down list to link the CaseWorthy™ issue to the appropriate report category. The category list is different for each individual baseline report as it is specific to the report criteria. When all relevant issues have been selected and linked, click the Save button.

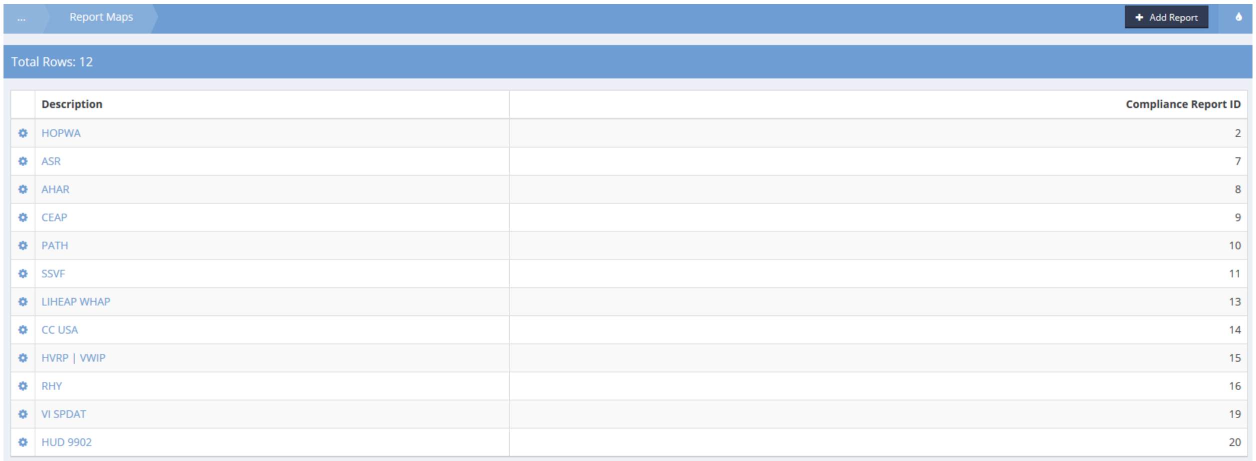


Map Issue Type to Report Value (VISPDAT)

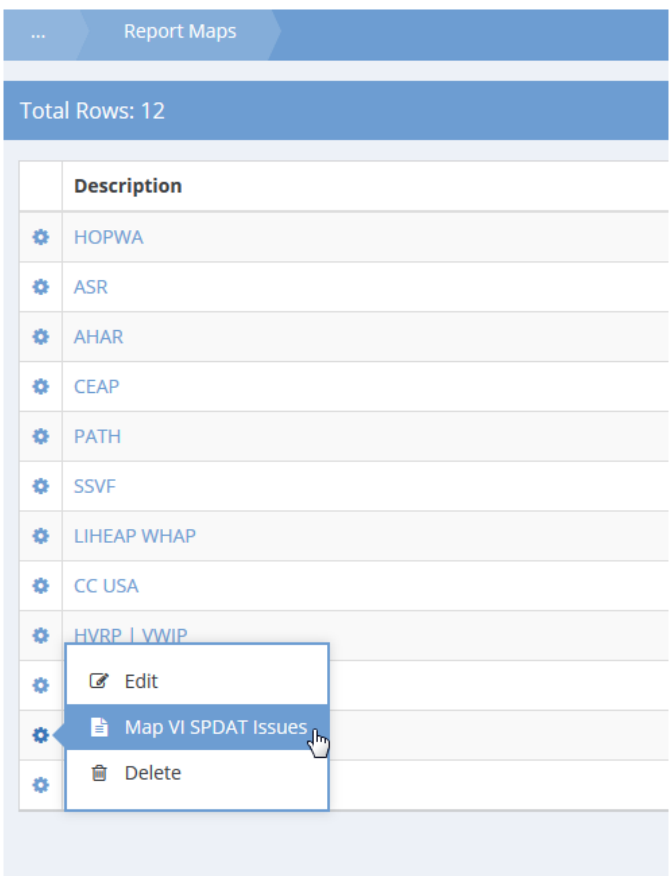
(Administration>Setup>Mappings)



Click the icon for Report Mapping.



The Report Maps form displays.

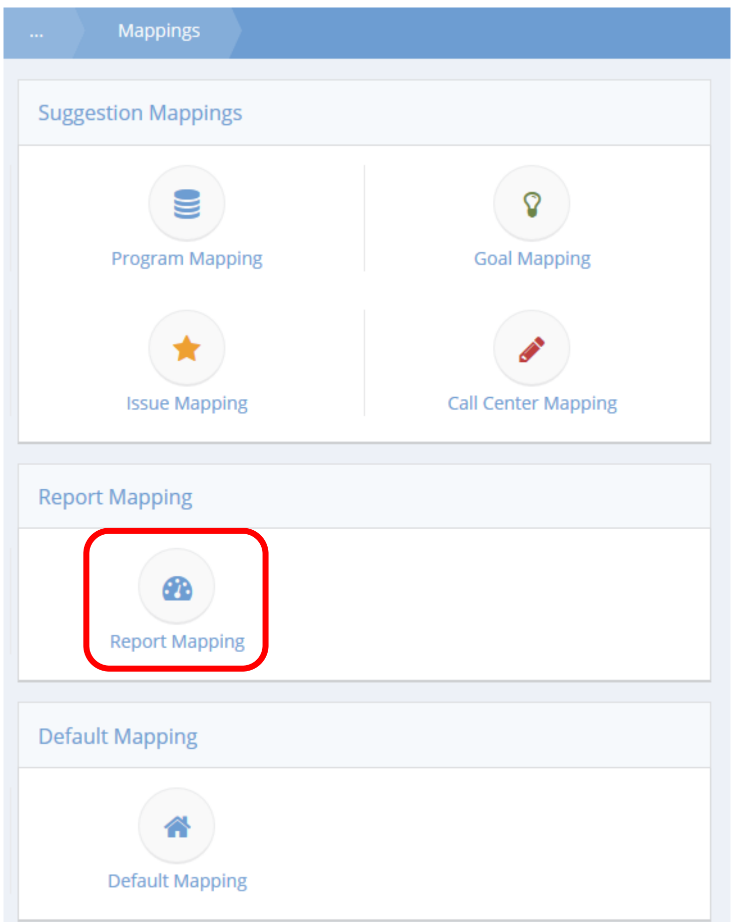


Click the action gear icon for VI SPDAT and click Map VI SPDAT Issues.

Use the search fields and Search button to filter issues. Click the clear checkbox to add an issue and select a map to value from the drop-down list. Click Save when finished.

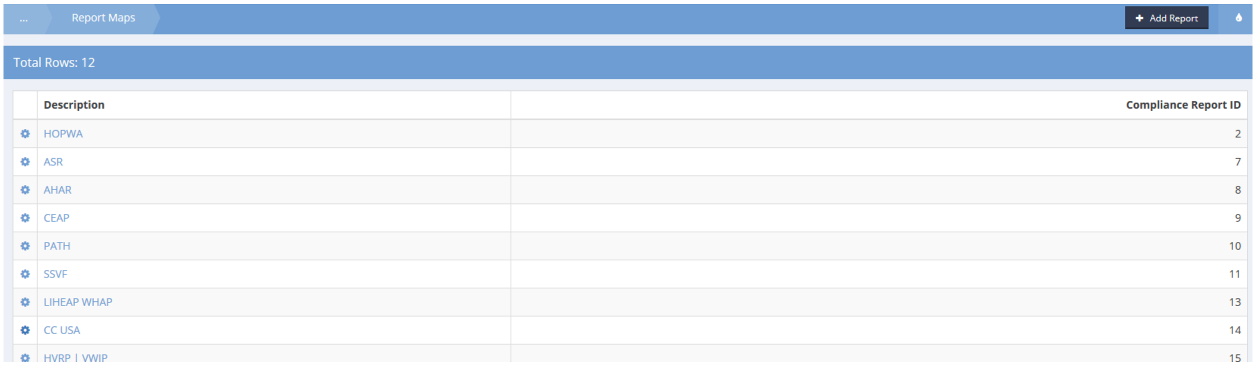
Map Issue Type to Report Value (CCUSA)

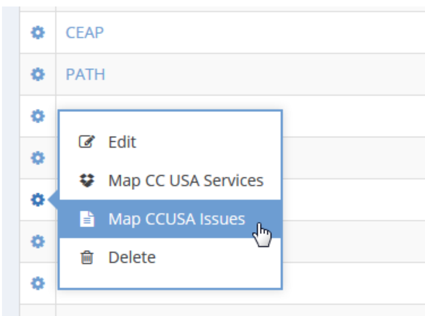
(Administration>Setup>Mappings)



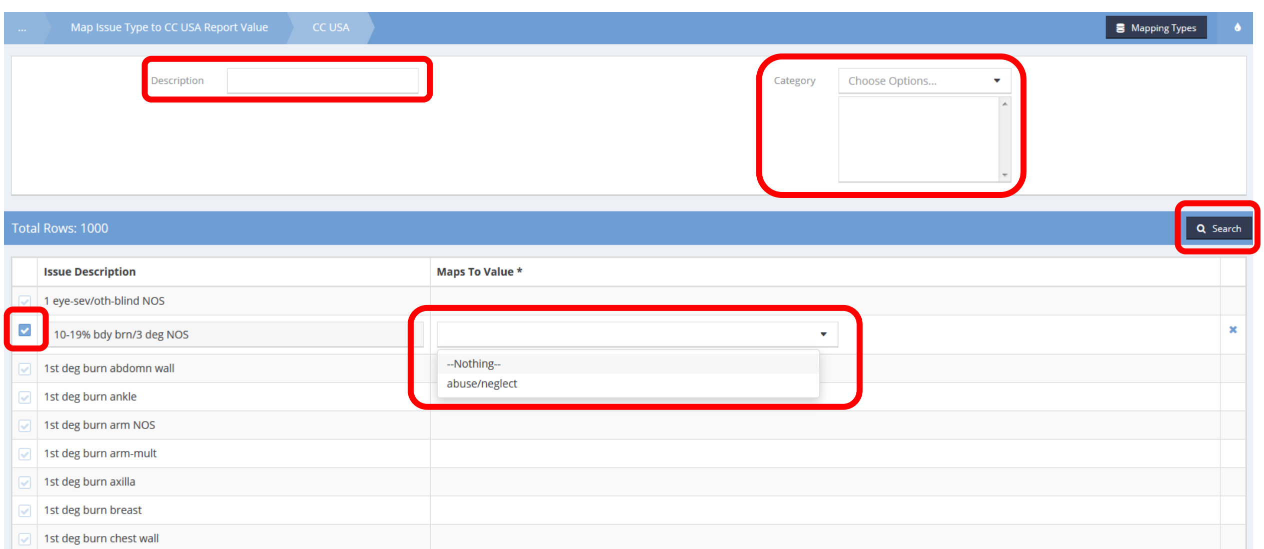
Click the icon for Report Mapping.

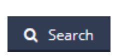
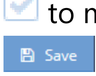
The Report Maps form displays.





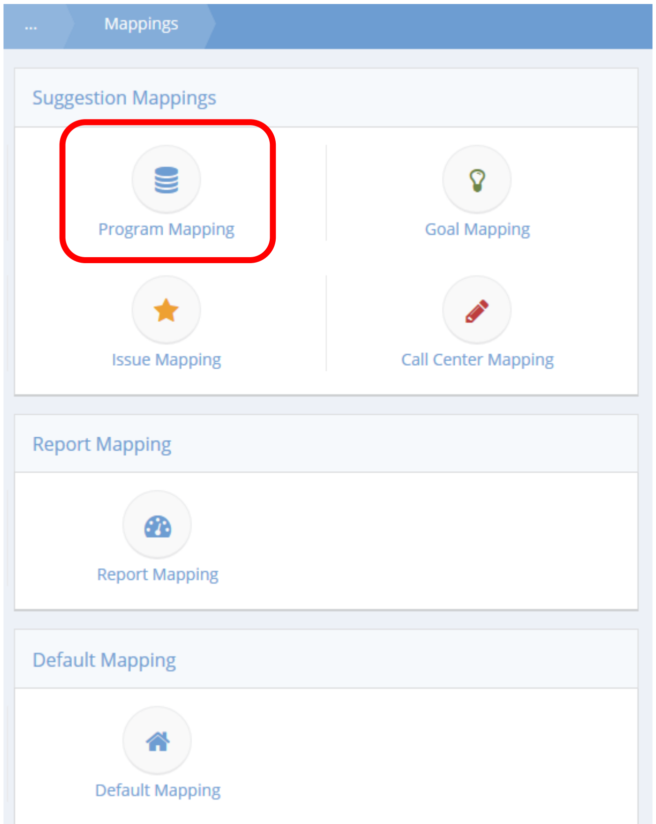
Click the action gear  icon for CC USA and click Map CCUSA Issues.



Enter values in the search fields and click  to filter the issues list. Click the clear checkbox  to map an issue to the report. Select the maps to value from the drop-down list. Click  when finished.

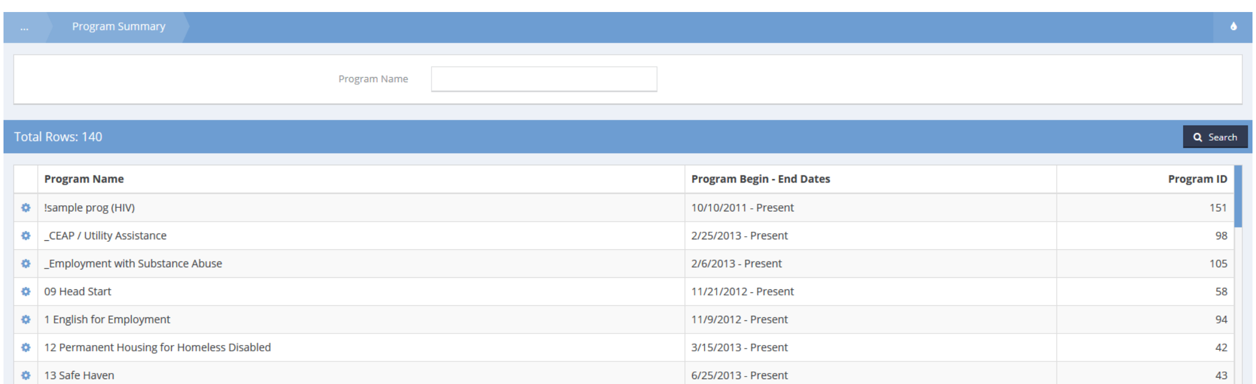
Suggest Plan Program (Summary)

(Administration>Setup>Mappings)

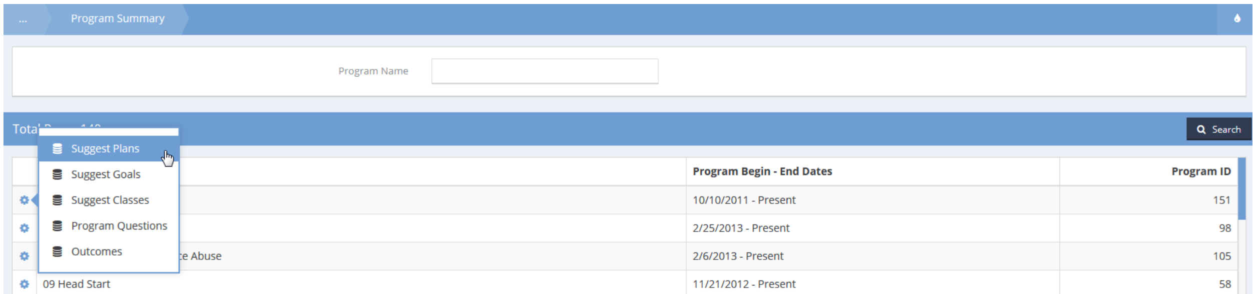


Click the icon for Program Mapping.

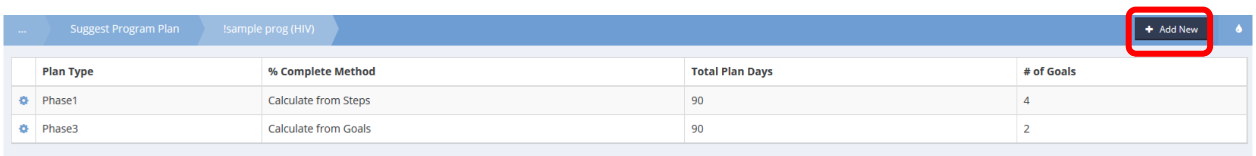
The Program Summary form displays.



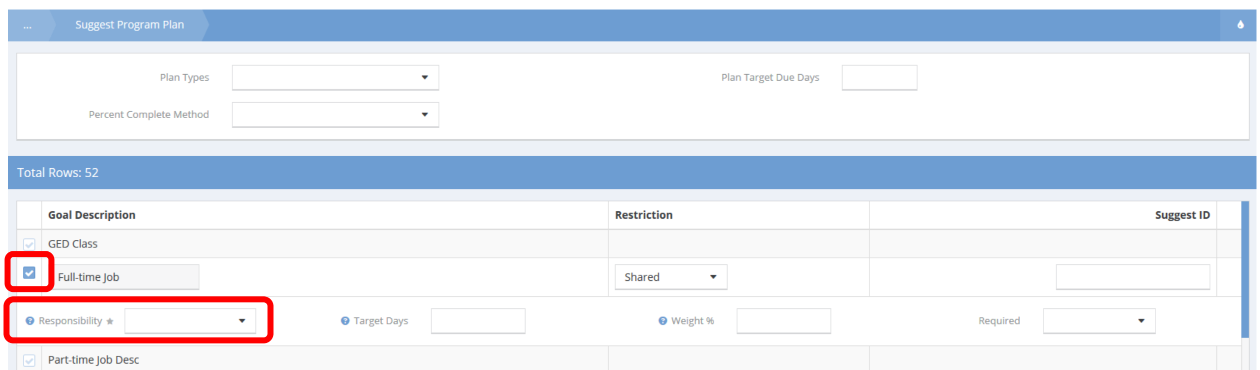
To view or add suggested plans, click the action gear icon and click Suggest Plans.



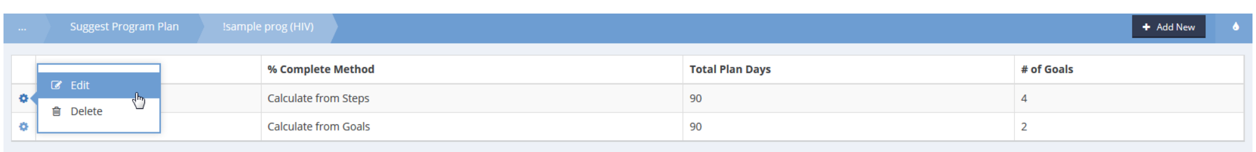
The Suggest Program Plan form displays.



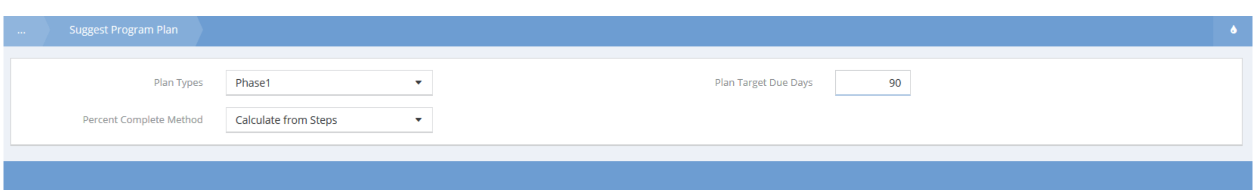
To add a new suggested plan, click the Add New button. The Suggest Program Plan form displays.



Select the drop-down fields as desired and click the clear checkbox to add a goal. In the expanded field, select a Responsibility from the drop-down list and enter any other relevant info. Click Save when finished.



To edit an existing plan, click the action gear icon and click Edit.

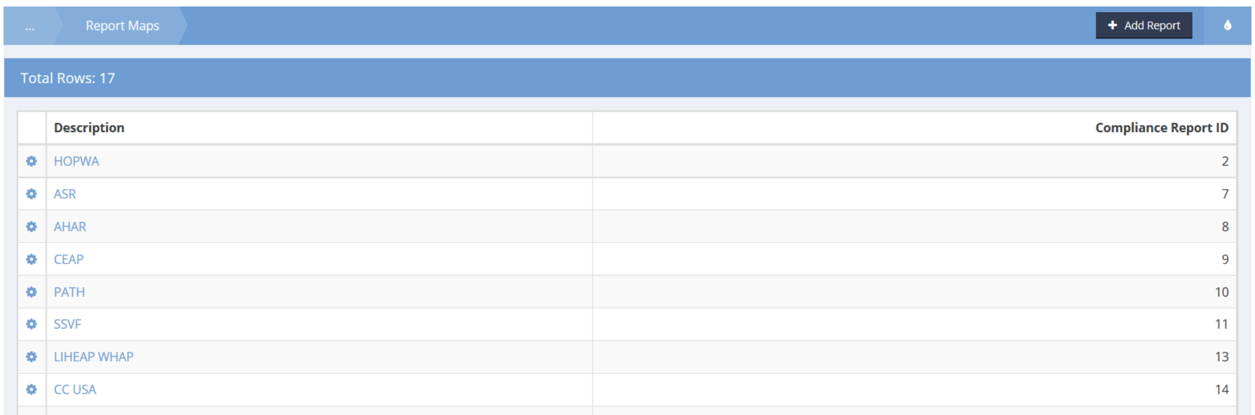


Make any necessary changes and click Save when finished.

Service Plan Mappings

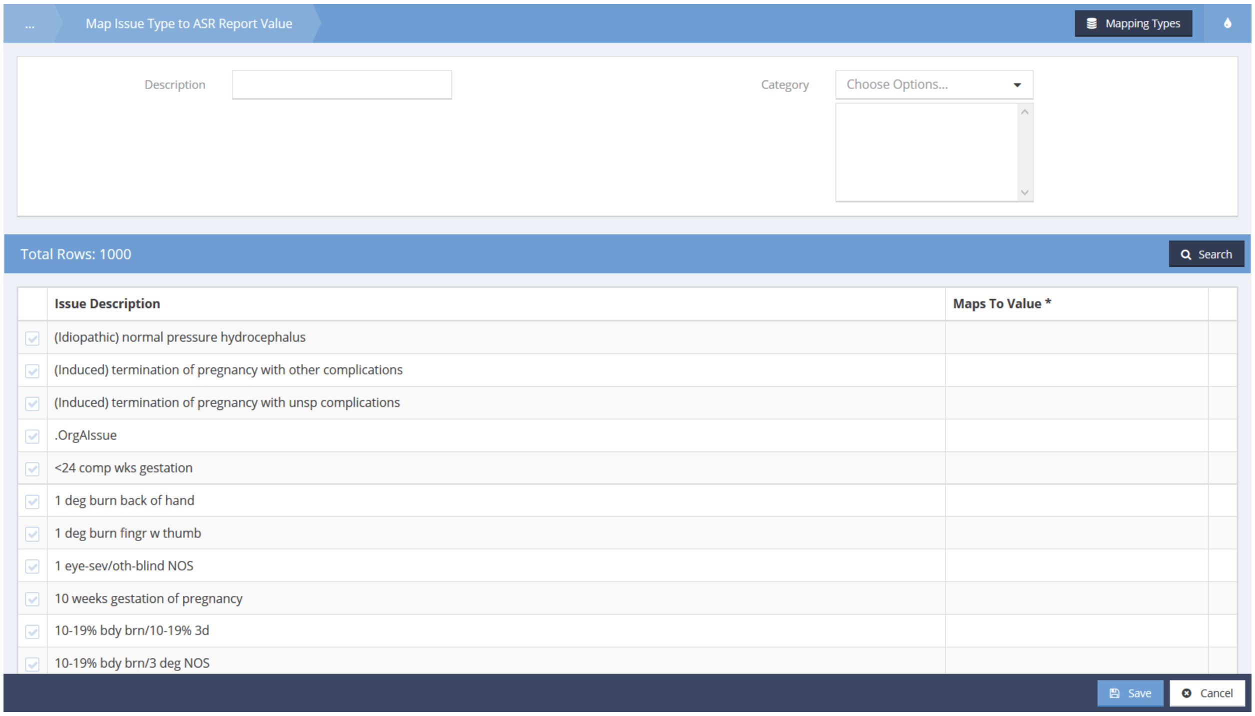
Objective: Link service plan issues to ASR report values.

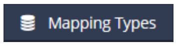
Navigation: Administration>Setup>Mappings>Report Mappings
The Report Maps form displays.



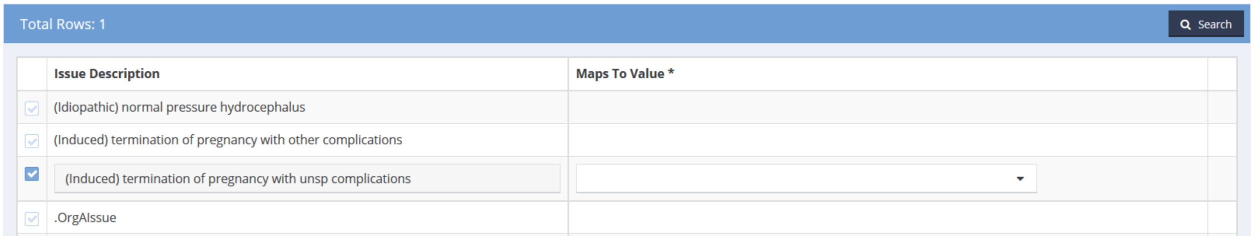
Click the action gear icon associated with Service Plan Report and select Map Service Plan Issues from the menu options.

The Map Issue Type to ASR Report Value form displays.


Map Issue Type to ASR Report Value
Mapping Types
Description
Category
Choose Options...
Total Rows: 1000
Search
Issue Description
Maps To Value *
(Idiopathic) normal pressure hydrocephalus
(Induced) termination of pregnancy with other complications
(Induced) termination of pregnancy with unsp complications
.OrgAIssue
<24 comp wks gestation
1 deg burn back of hand
1 deg burn fingr w thumb
1 eye-sev/oth-blind NOS
10 weeks gestation of pregnancy
10-19% bdy brn/10-19% 3d
10-19% bdy brn/3 deg NOS
Save
Cancel

Use this form to map issues associated with the ASR to values on the ASR report. Create the values first, using the 

button. Select a row, it expands, select the value from the drop-down list.

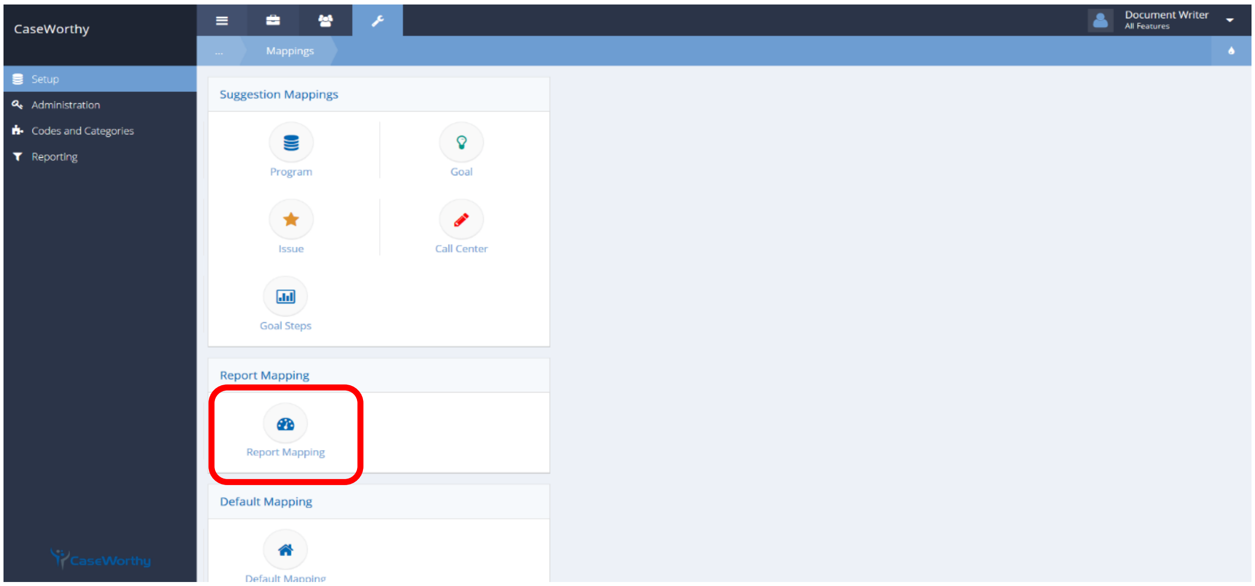


Link all issues as applicable. Save and close.

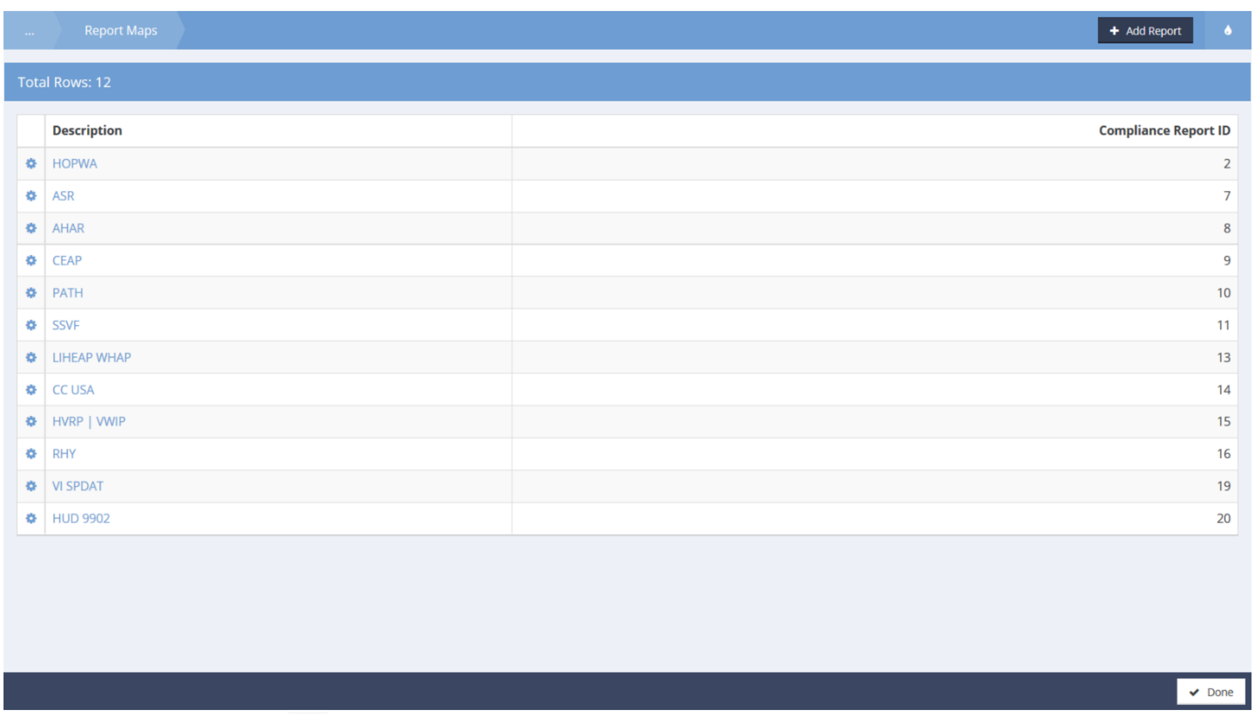
RHY Report Mapping

Objective: Map RHY issues.

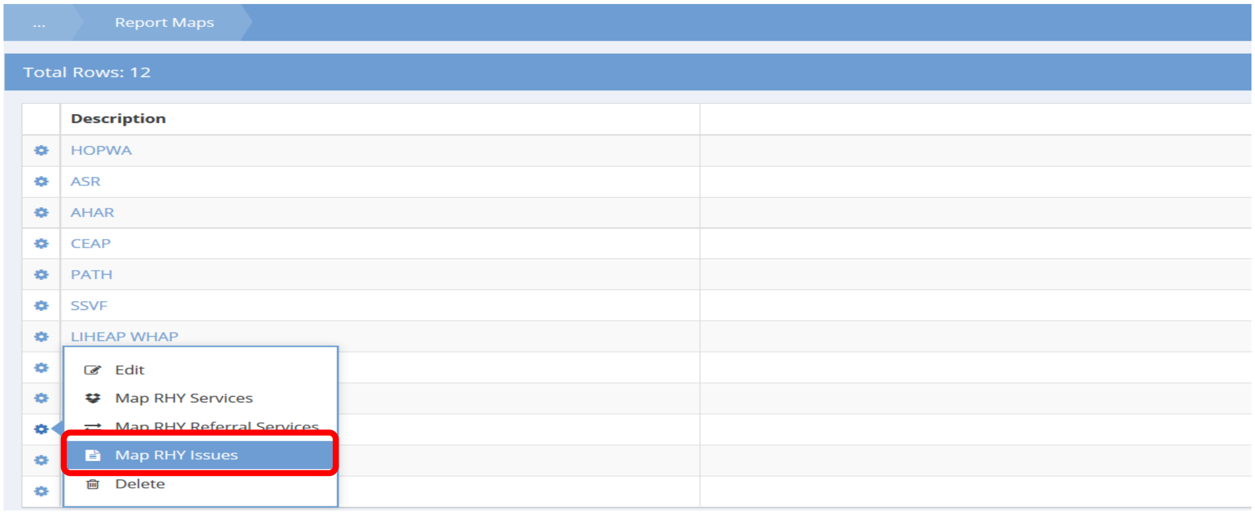
Navigation: Administration>Setup>Mappings



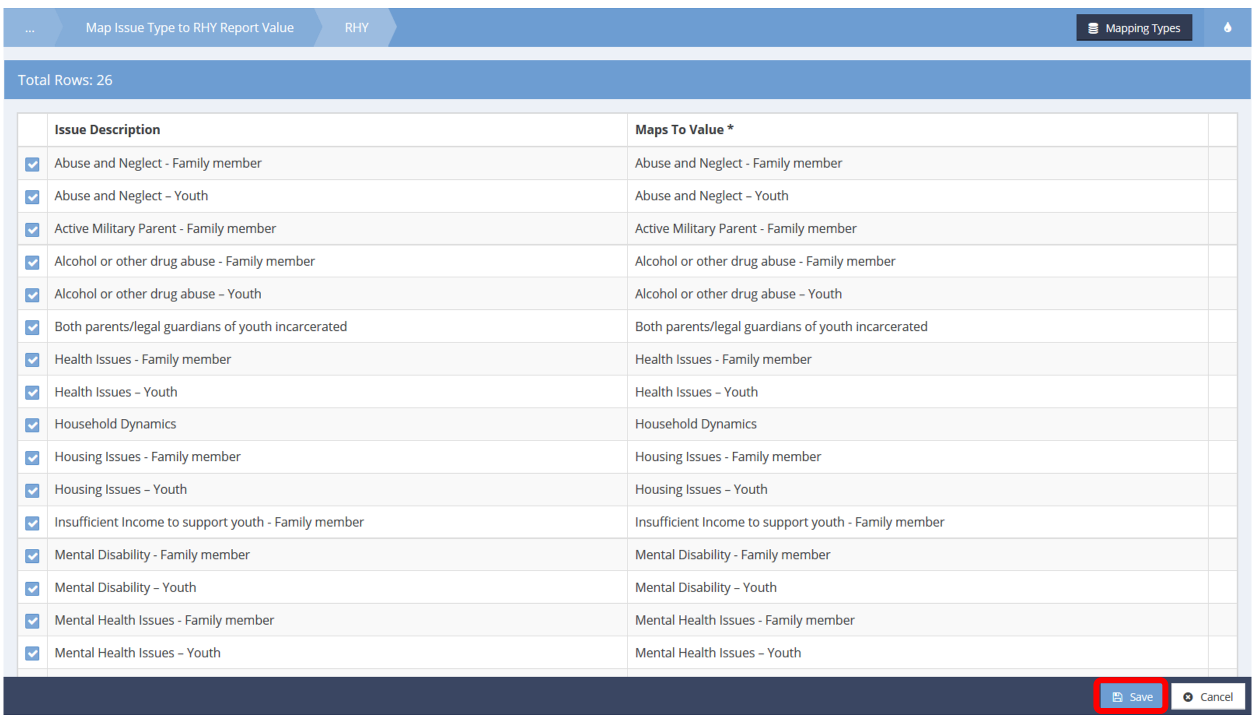
Select Report Mapping from the Report Mapping portion of the Mappings dashboard. The Report Maps form displays.



Click on the action gear icon associated with RHY and select Map RHY Issues from the menu opitions.



The Map Issue Type RHY Report Value form displays.

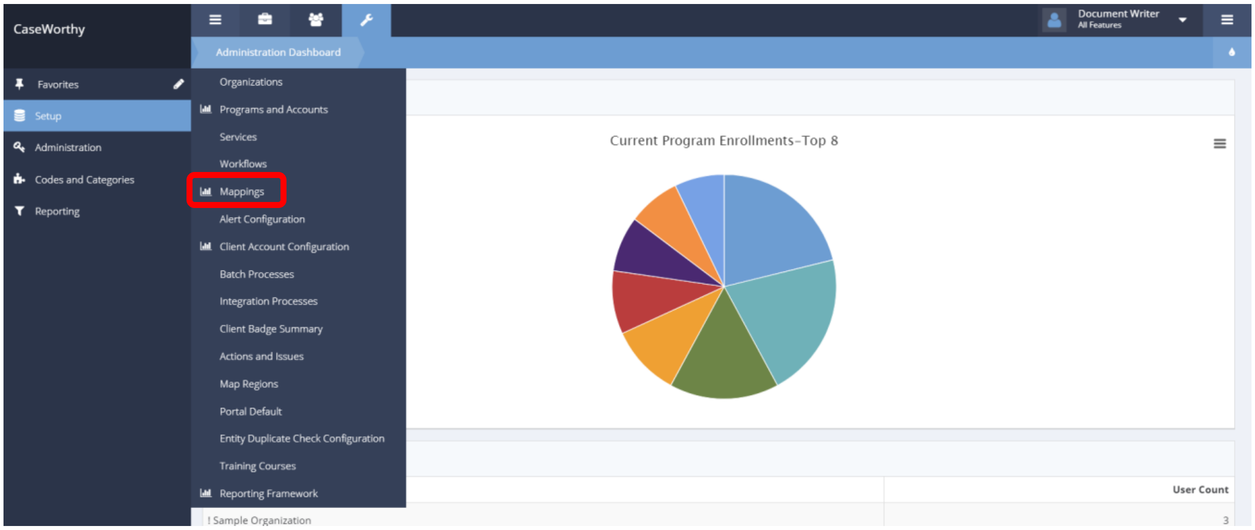


Click the blue checkbox icon to expand the row and make any desired changes to the mapping values, click the Save button to save and exit.

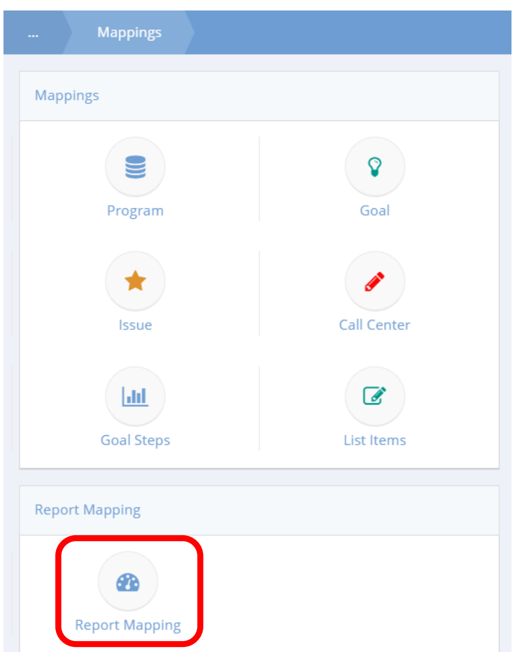
Map Service Type to Report Value (Generic)

Objective: Improve the convenience of report mapping.

Navigation: Administration>Setup>Mappings>Report Mapping>RSR>Service Mapping



Under the Administration tab, select Setup. A pop-up menu displays. From the pop-up menu, select Mappings. The Mappings dashboard appears.



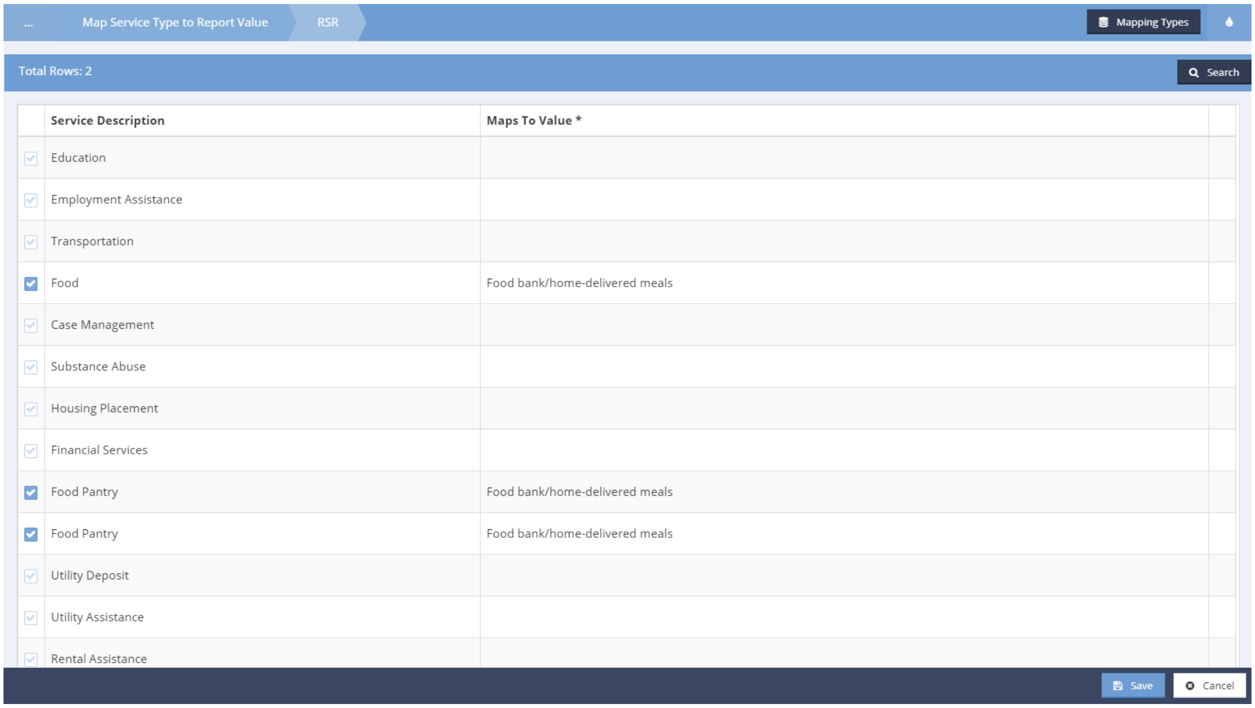
Click on the Report Mapping icon.

The Report Maps form appears.

Click the icon next to RSR. A pop-up menu appears.

Select Map RSR Services from the pop-up menu.

The Map Service Type to Report Value form appears.



Use the form to indicate Services to map and their associated report value. Click the icon next to any Services desired.

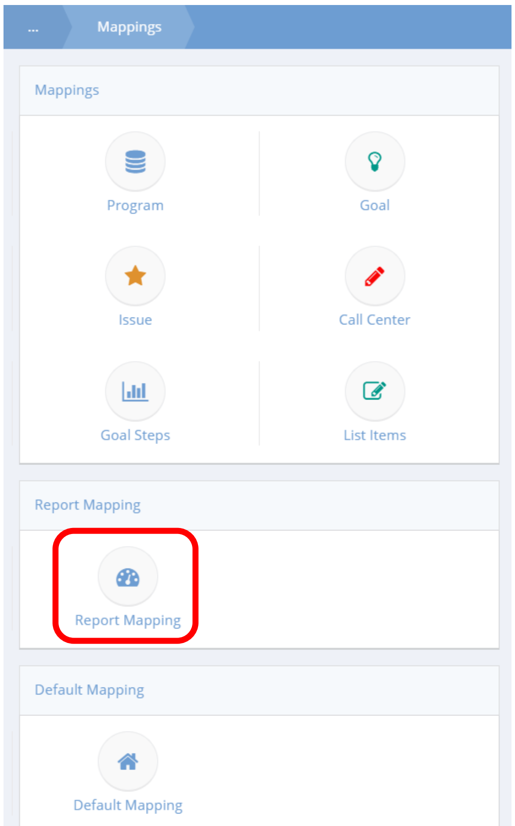
The icons turns blue and a drop-down-menu appears under the Maps To Value category. Use the drop-down menu to select a report value. After all new Services and Values are chosen, click the Save button to return to the Report Maps page.

Map Issue Type to Report Value (Generic)

Objective: Improve the convenience of report mapping.

Navigation: Administration>Setup>Mappings>Report Mapping>RSR>Service Mapping

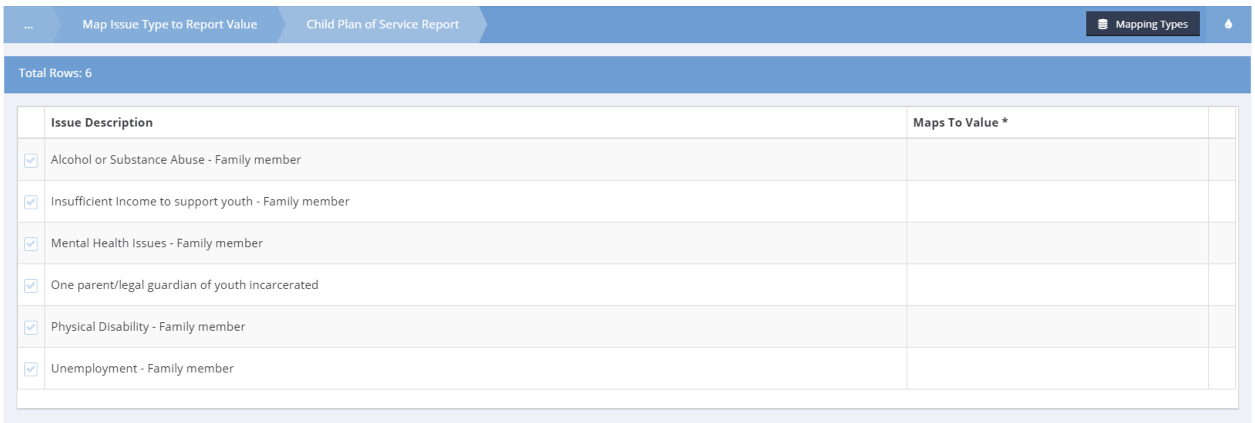
From the Mappings dashboard, click on the Report Mapping icon.



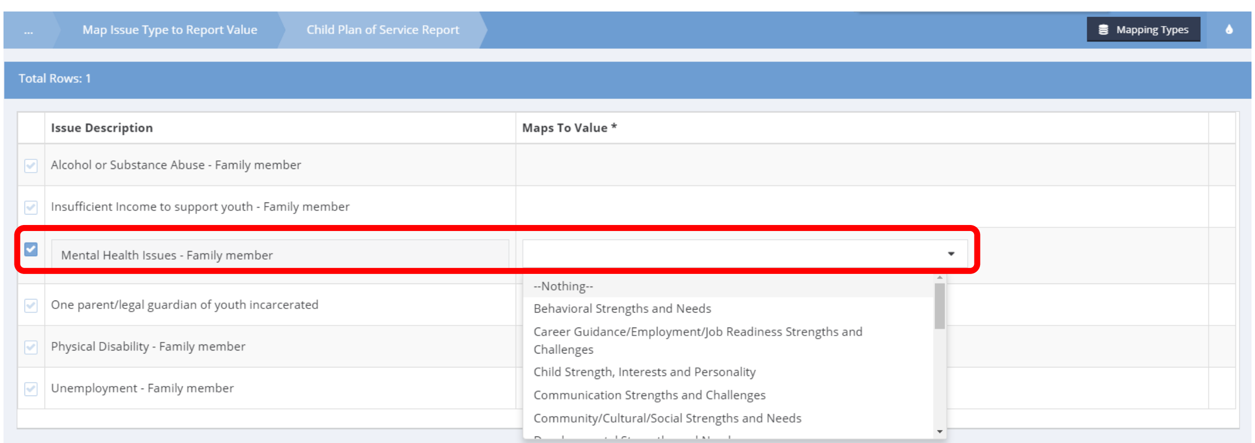
The Report Maps form displays.

Click the icon next to Child Plan of Service Reports. A pop-up menu appears.

Select Map CPOS Issues from the menu. The Map Issue Type to Report Value form appears.



Use the form to indicate Issues to map and their associated report value. Click the icon next to any Issues desired. The icons turn blue and a drop-down menu appears under the Maps To Value category.



Use the drop-down menu to select a report value. After all new Issues and Values are chosen, click the Save button to return to the Report Maps page.

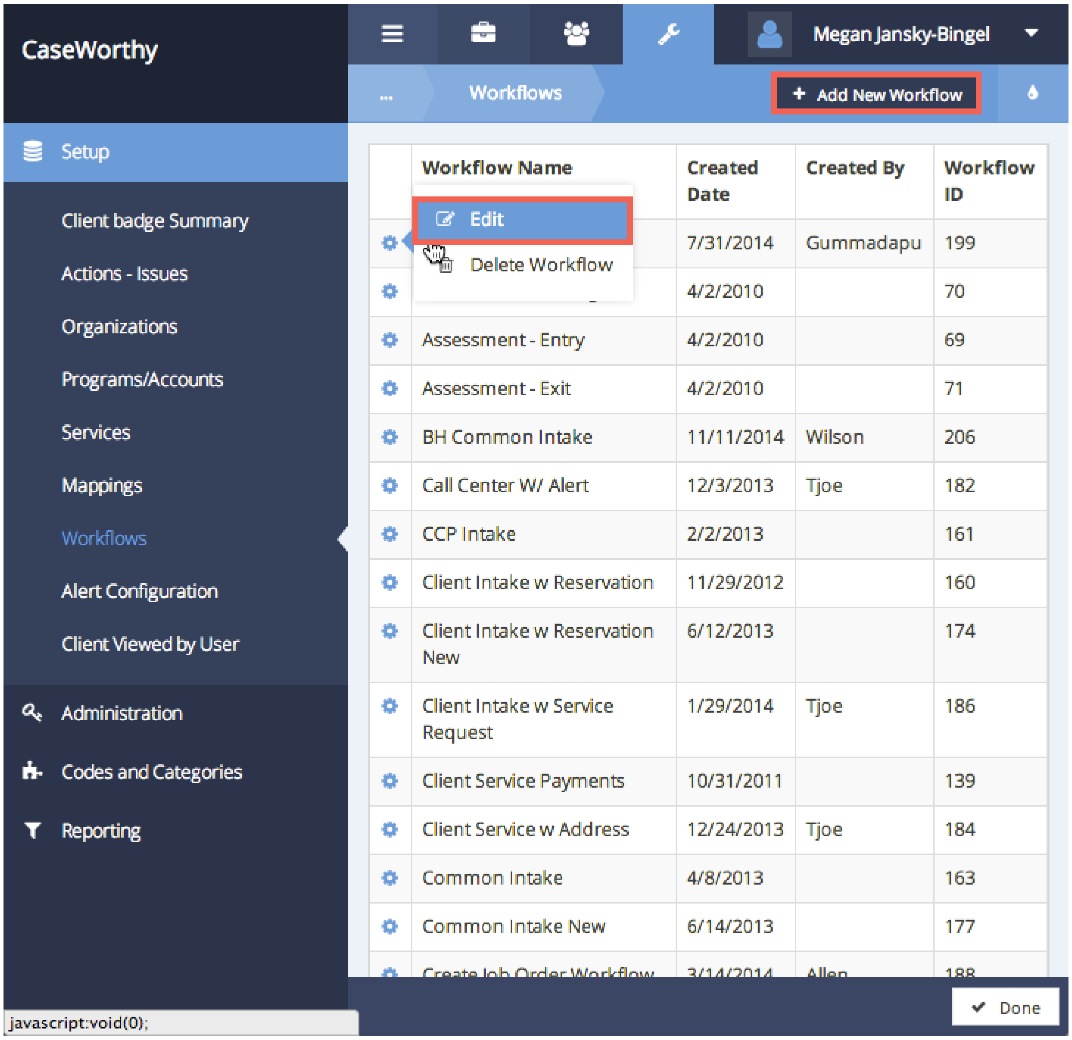
Workflows

(Administration>Setup>Workflows)

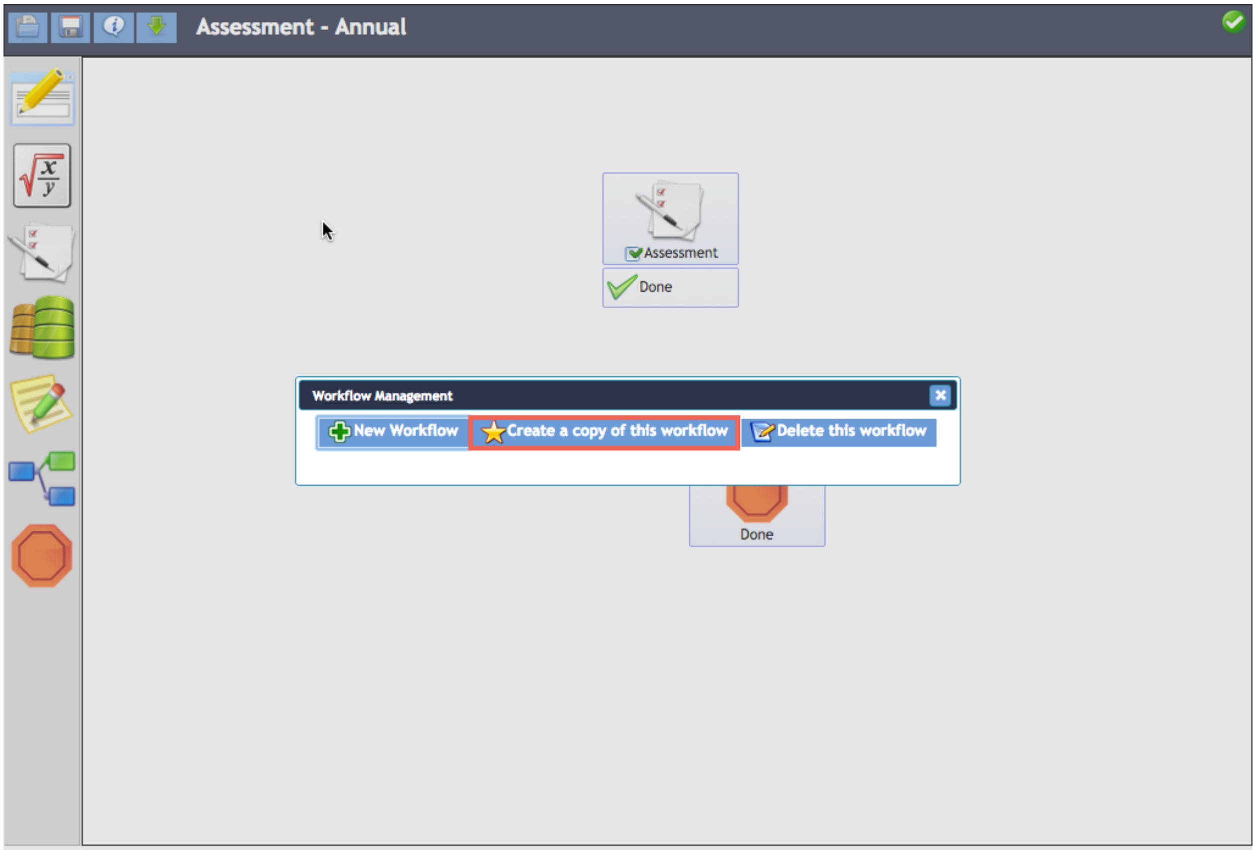
"Workflows" is a feature within CaseWorthy™ which carries the user smoothly through a pre-defined process by automating the progression of work. Workflows are great tools to implement any time a user needs to complete two or more forms as part of a data collection process or client interaction. Once a workflow has been initiated by a user, the necessary forms flow in order so that as the user completes and saves each screen, the next screen appears. The following section describes how to design and set up workflows within the system.

The first step in developing a workflow is to define the process – whether it is an intake, case management, retention, or program exit process. It is most convenient and efficient if the necessary forms are already available in the system. If the workflow requires custom forms, refer to the CaseWorthy apBuilder™ Guide to learn more about creating custom forms in the system. Ideally, map out the order in which the forms should flow and write down the form numbers prior to initiating the workflow development.

If the new workflow has similarities or shares common forms with a workflow currently in the system, click the action gear next to the desired workflow and select "Edit".

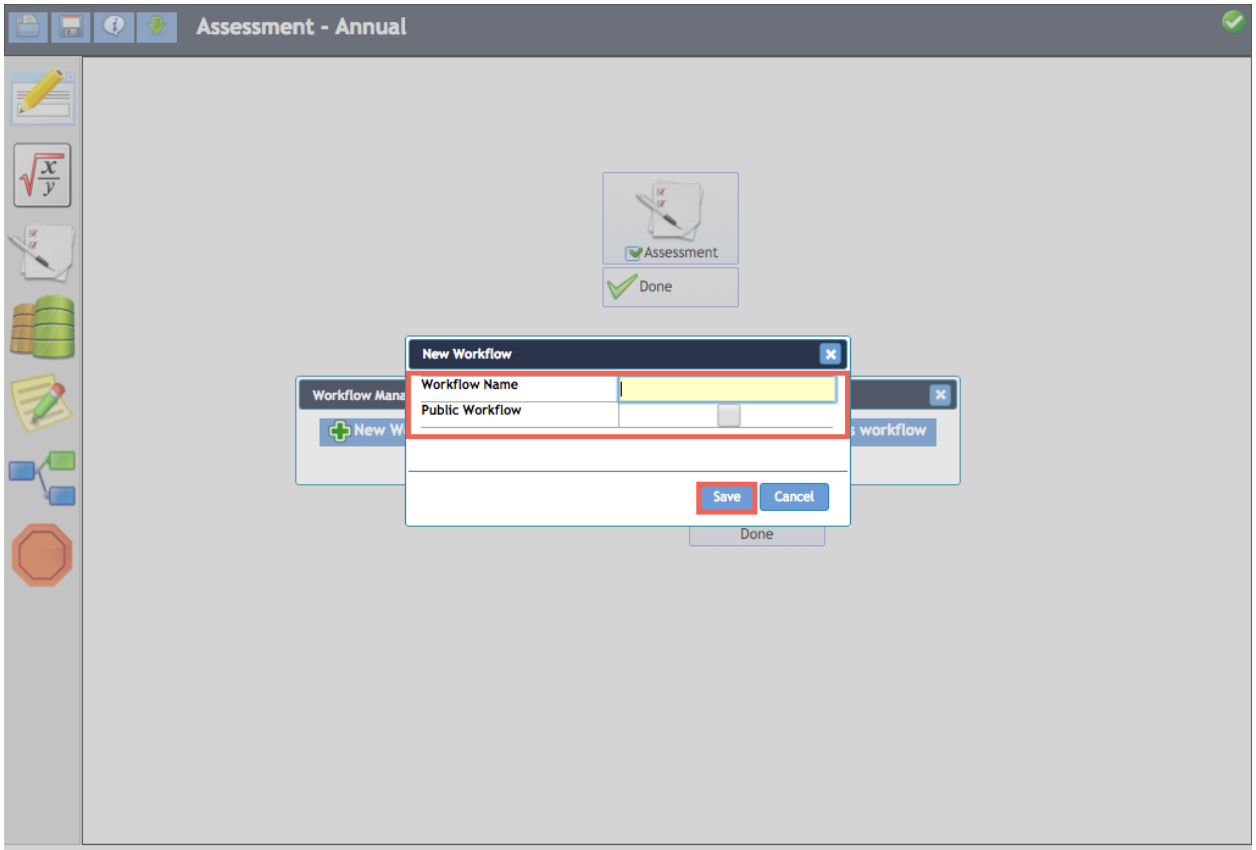


When the workflow designer pops up, click on the "Workflow Management" button at the far left of the menu bar.



In the Workflow Management window, select the Create a copy of this workflow button. Otherwise, click the New Workflow button.

When creating a new workflow enter the workflow name in the pop-up window. To view this workflow on the portal, select the box for Public Workflow. Click the Save button.



Basic Workflow Designer functionality:

The icons at the top right of the pop-up window function the same as they do in the form designer tool within CaseWorthy™. For more information on CaseWorthy™ form designer tools refer to the CaseWorthy™ apBuilder™ Guide.

On the left side of the pop-up window there are a series of icons. To use these within the workflow, simply drag and drop them from the left side menu into the workspace within the designer. A brief synopsis of each tool is outlined below.

Form Workflow Step – this control allows the system administrator to link any form that exists in the system to a step in the workflow.

Logic Workflow Step– use this control to define conditional logic that can be carried from one form to another

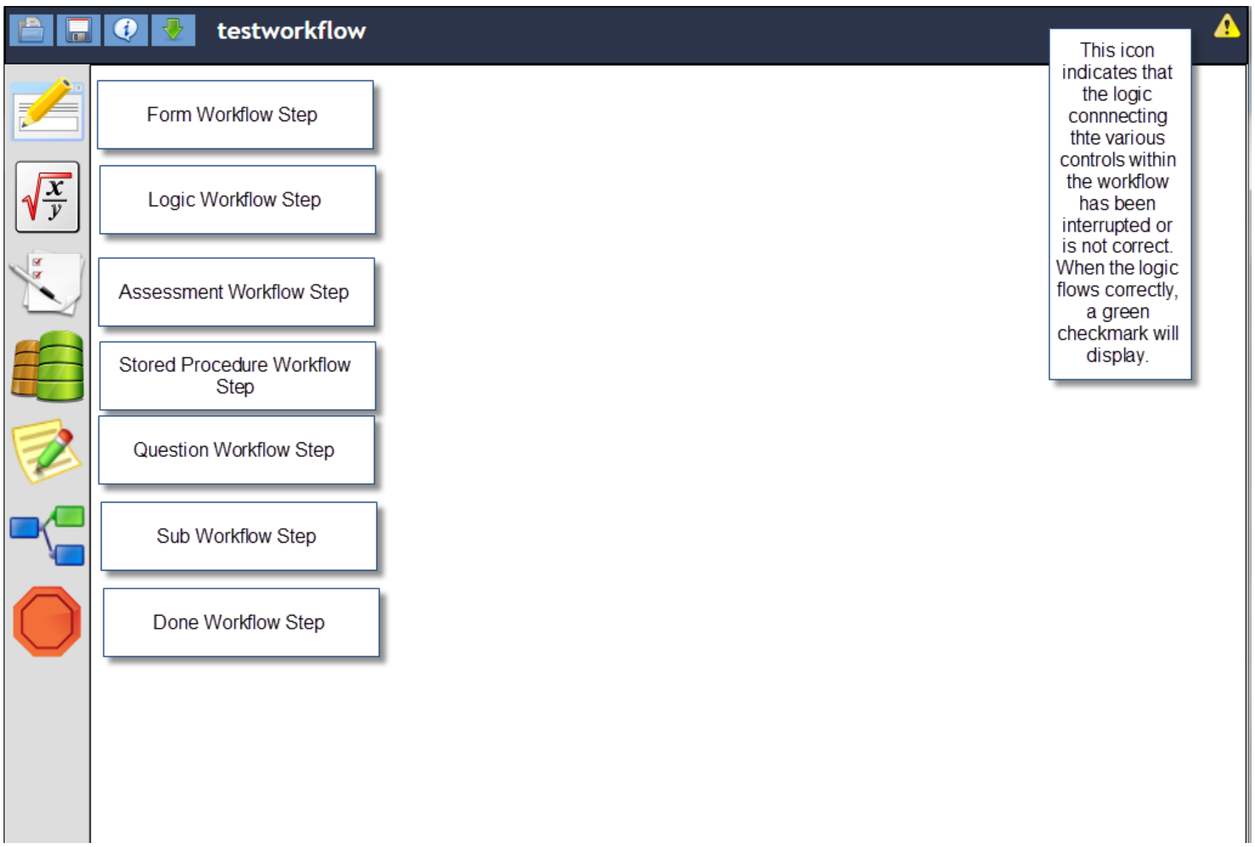
Assessment Workflow Step– This control automatically triggers required assessments linked to the specific program that is referenced in the workflow. There is no need to link assessments as forms within the workflow, the system automates this step based on program assessment set up. For more information on linking and requiring assessments for specific programs, see the “Linking Assessments to Programs” section of this manual.

Stored Procedure Workflow Step – this option allows a stored procedure to be added as a workflow step.

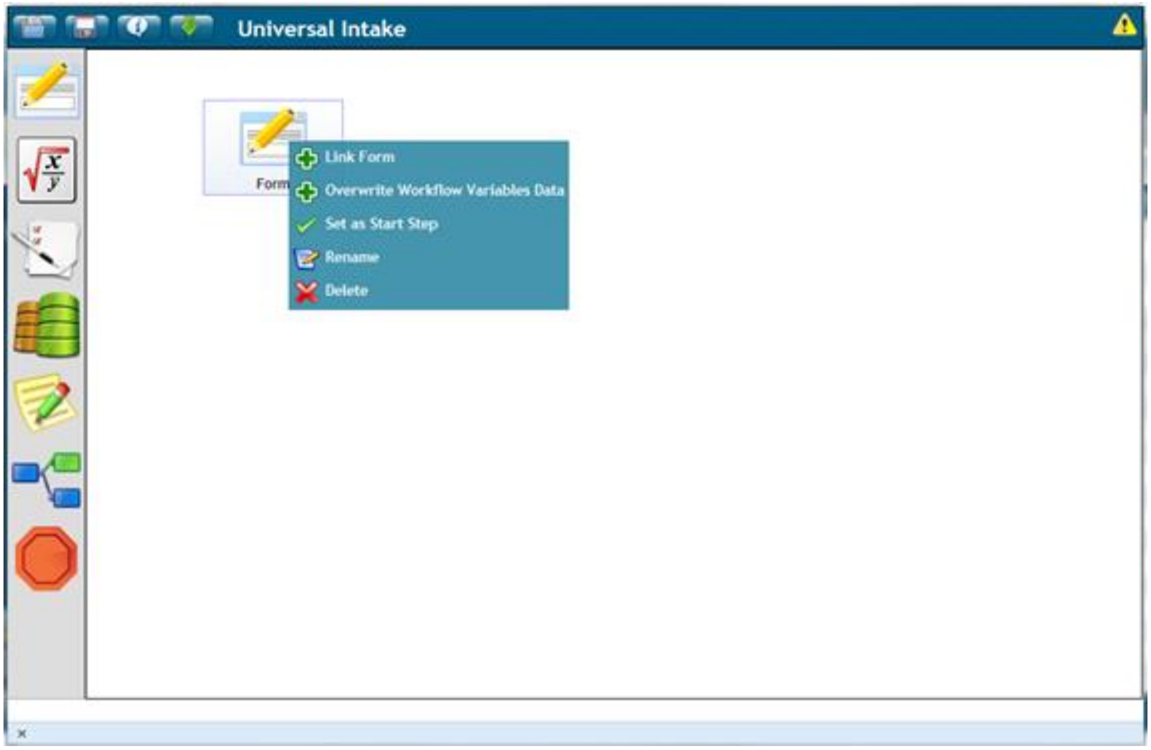
Question Workflow Step – this control allows the system administrator to insert a question within the workflow and drive the next step in the process based on the user's response.

Question Workflow Step– this allows the user to insert a short-cut into the workflow using a currently existing workflow to define the next steps in the process.

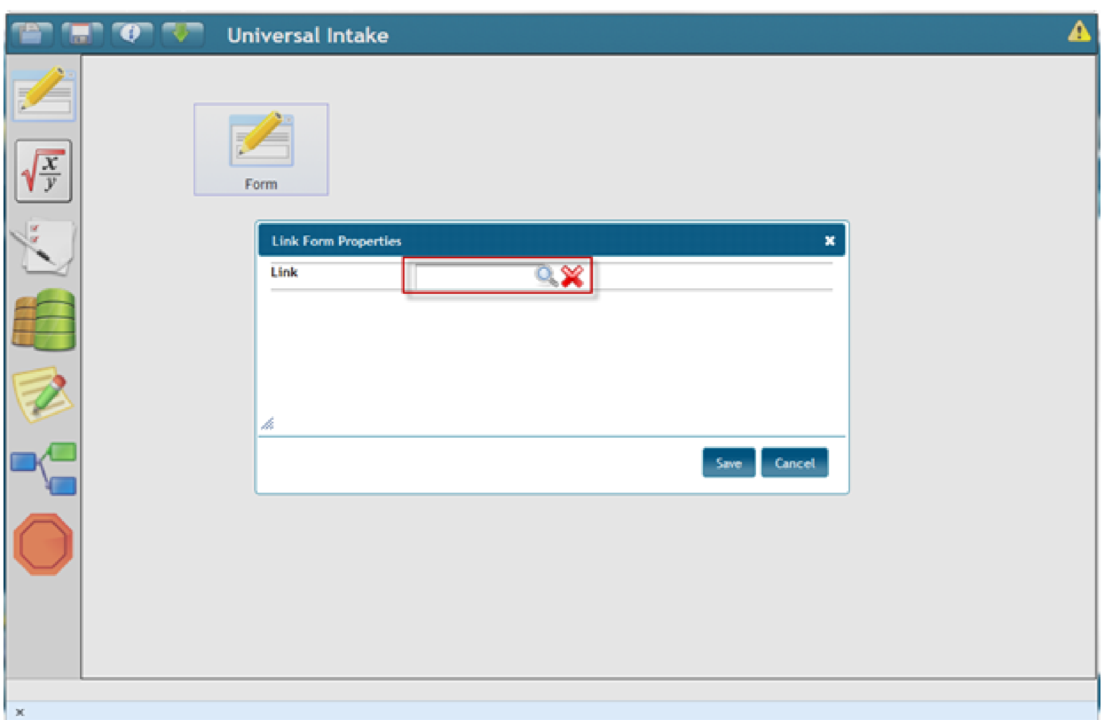
Done Workflow Step – this control must always be the final step, signaling the end of the workflow.

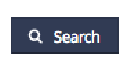


To begin designing the workflow, drag and drop the desired control to the workspace. Once the control is placed in the workspace, click the icon to access the options menu. Be sure to click the "Set as Start Step" on the first step of the workflow.

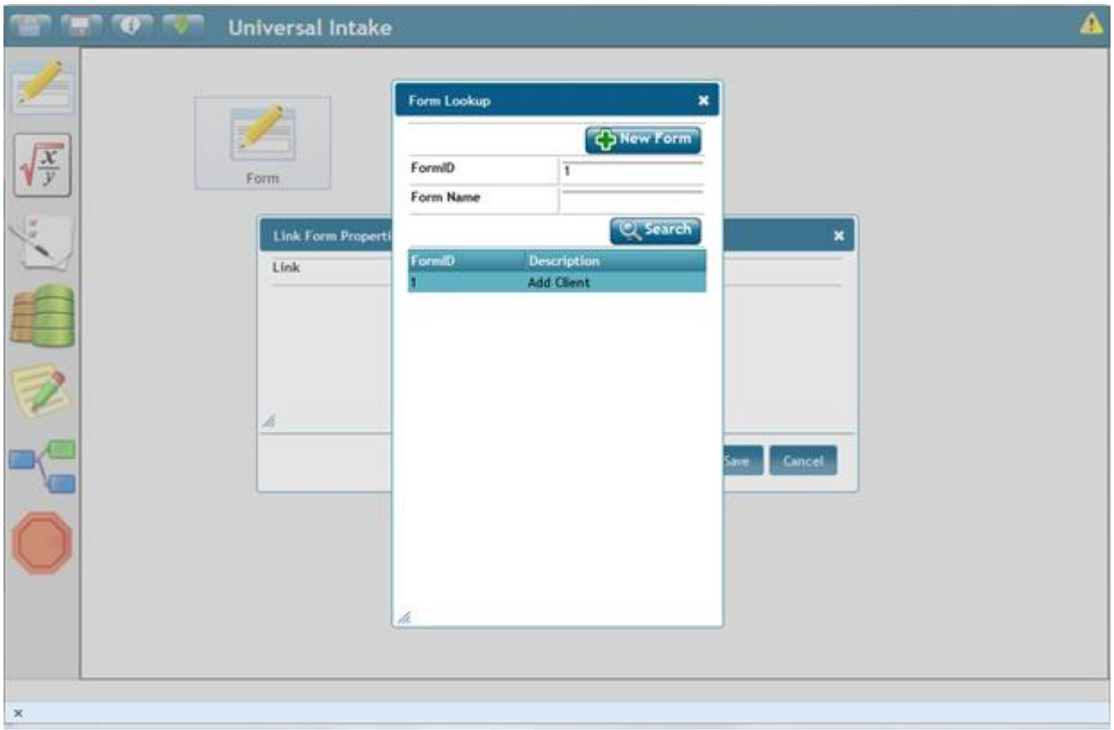


Forms are inserted into the workflow using the Workflow Forms Control. From the form control menu, select “Link Form”. Use the look-up field to search for and select the desired form.

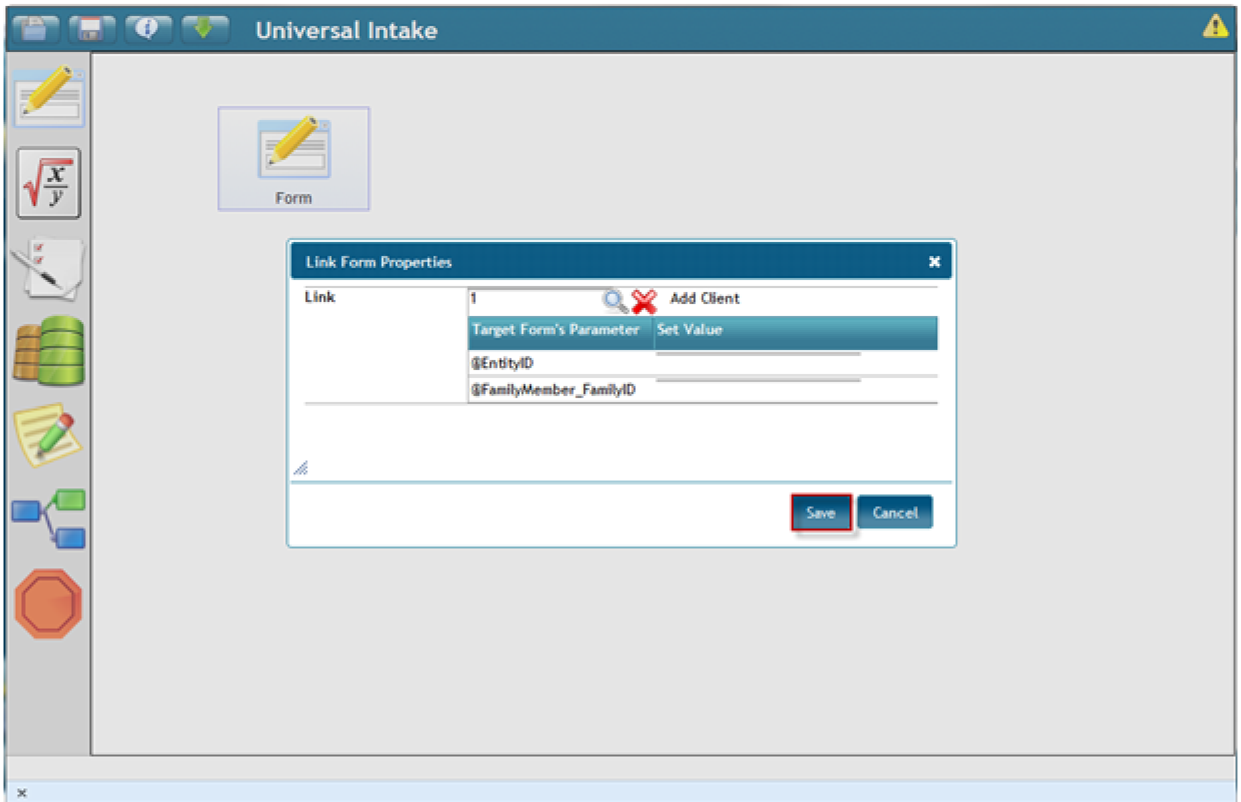


Enter either the Form ID number or Form Name to narrow the search, then click the 

button. Click on the desired search result.

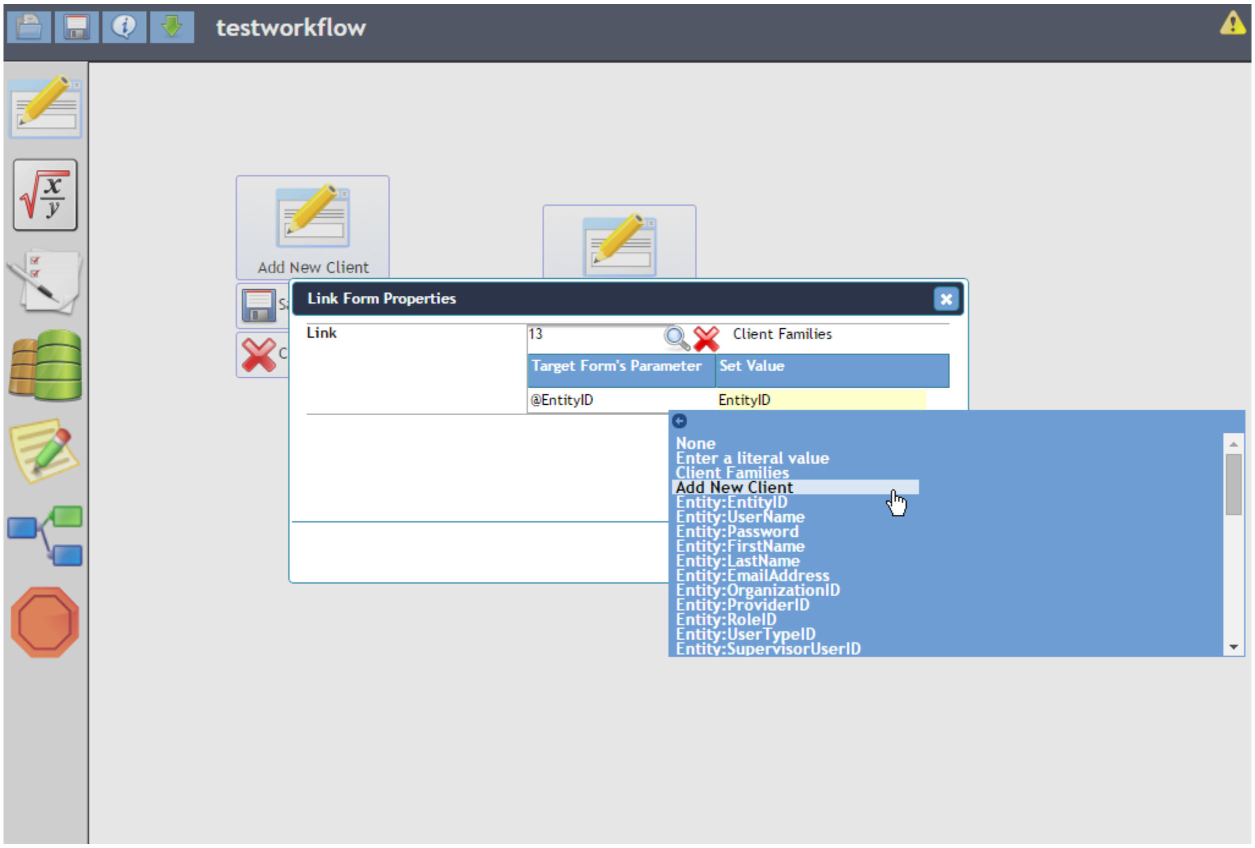


Once the form is selected, it displays on the Link Form Properties pop-up. One of the keys to a properly functioning workflow is to have data carry from one form to the next. Any parameter associated with a form that contains data not generated by that form, needs to be linked from a previous form. Typically, the first form is the “Add Client” form and does not require any linked data – it creates the necessary data. Simply click Save and move on to the next desired control.

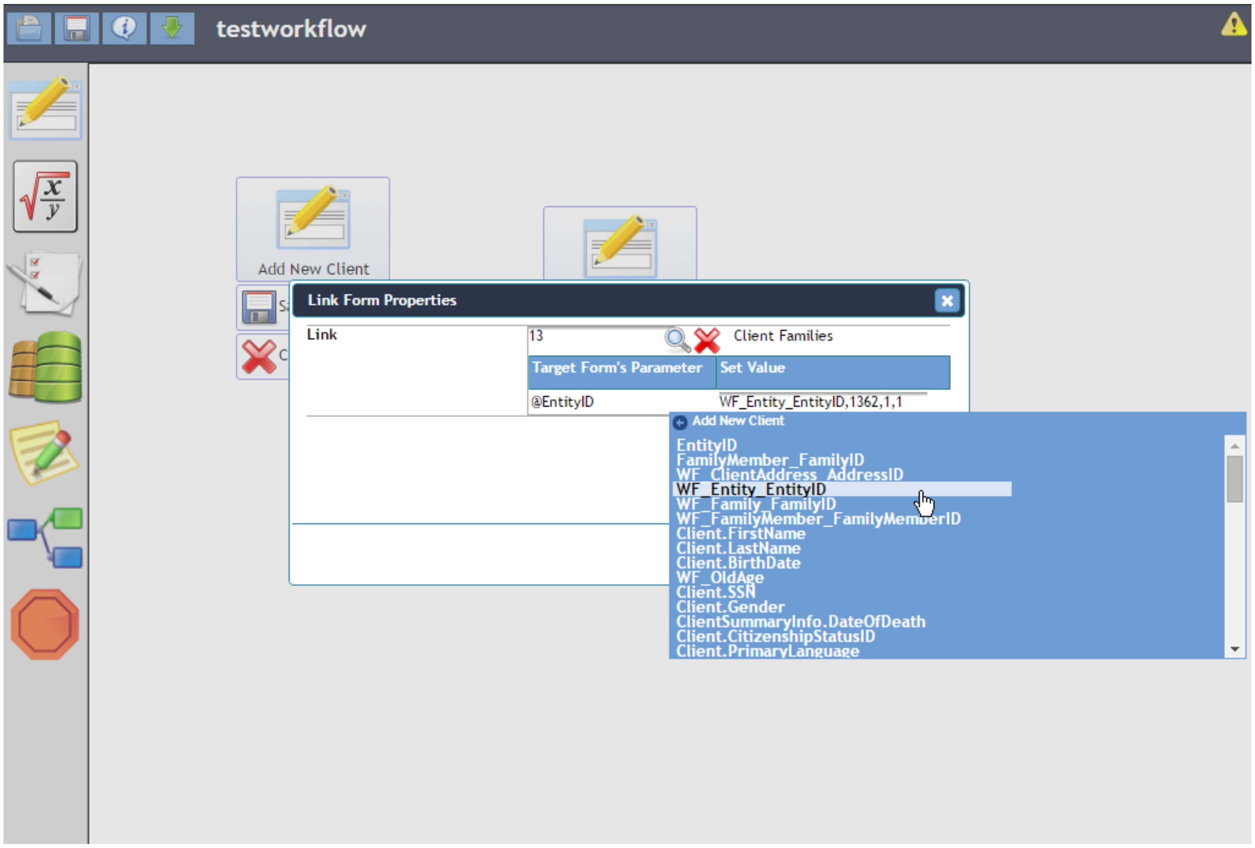


The workspace displays the name of the linked form in the Workflow Form Control and adds icons for each button that exists on the bottom of the form. As the workflow is built, the system administrator who is building it may use Workflow Connectors to link the buttons with the next step. This allows flexibility within the workflow so that different actions the user takes on the form can lead to different steps in the workflow process.

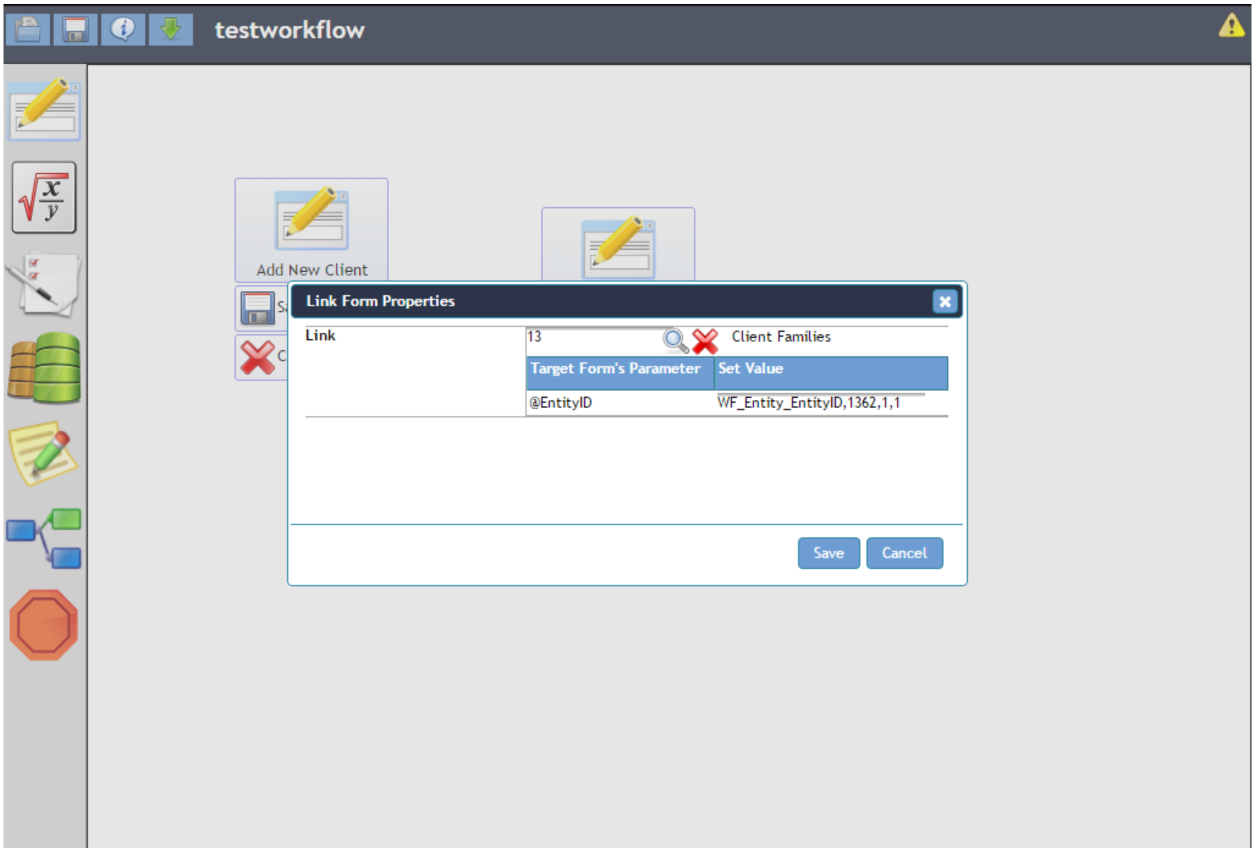
Next, choose the next workflow control and drag and drop it to the workspace. Repeat the steps above for a Workflow Form Control to search and select the next form. Once the form has been linked, the Link Form Properties pop-up displays and necessary parameters can be linked. In the example below, the Client Families form needs to receive the Entity the family needs to be associated with. The previous "Add Client" form generated an Entity ID for the client that was created. This ID needs to be linked. To do so, click on the empty field to the right of the "@EntityID". A menu displays listing all data columns available. To be sure that the correct Entity ID is associated with the Client Families form, it is important to use the one that was generated by the Add Client Form. Click on the "Add New Client" option in the drop-down list.



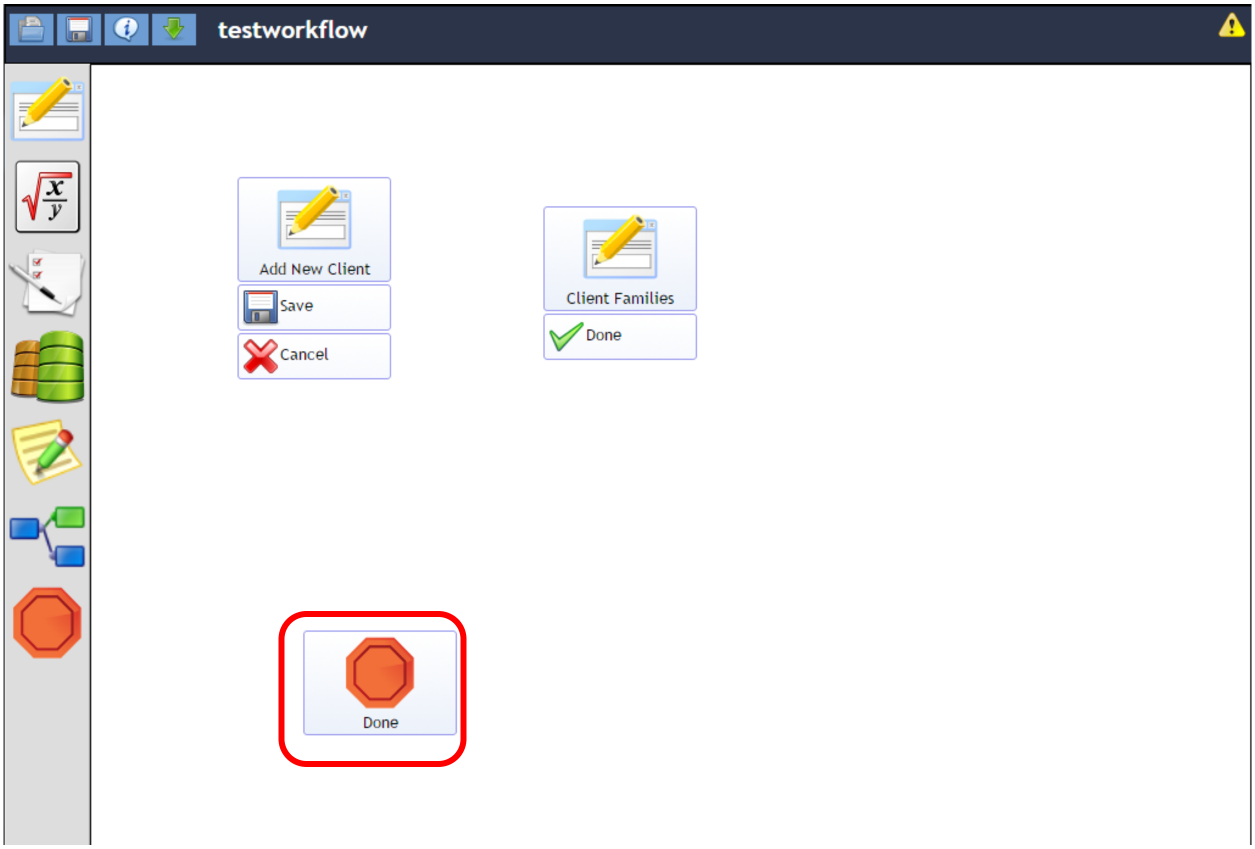
The list now displays all data columns associated with the Add Client form. The best practice is to choose the "WF" option when it is available. This helps to assure that the workflow only grabs the data that was generated within the workflow. In this example, choose "WF_Entity_EntityID". Basically, this tells the Client Families form to use the Entity ID from the Entity ID column of the Entity table that was generated from the Add Client form of this workflow.



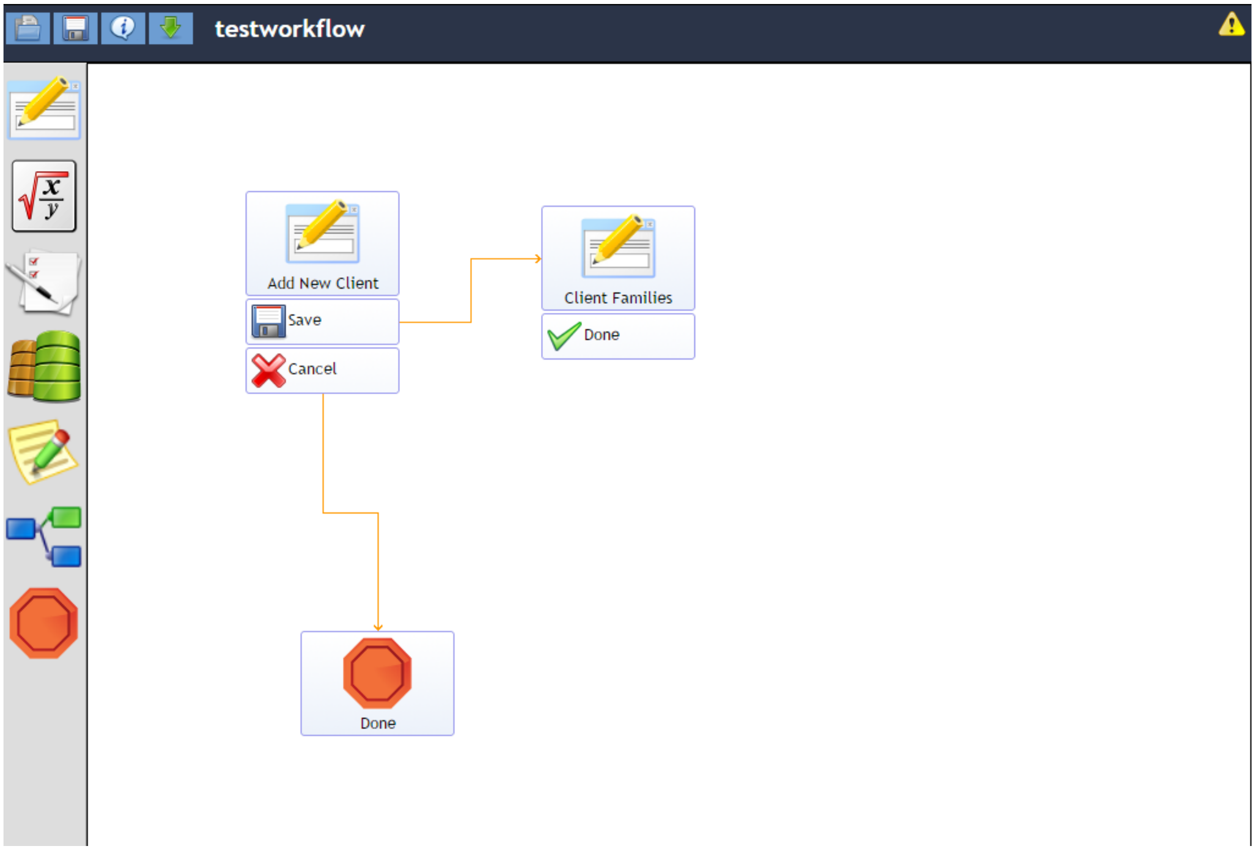
The Client Families form only uses the Entity ID parameter. Some forms have numerous parameters. The system administrator needs to have a basic understanding of the forms in the system, their purpose and how they handle data. As mentioned previously, data that is not generated by the current form MUST be linked. At the same time, data that is generated by the current form CANNOT be linked. The system administrator should have some experience and early support from CaseWorthy™ to learn how and when to link parameters. Once there is a certain level of knowledge and comfort with the system, linking parameters should become second nature. Once all relevant and required parameters have been linked, click the Save button on the Link Form Properties pop-up.



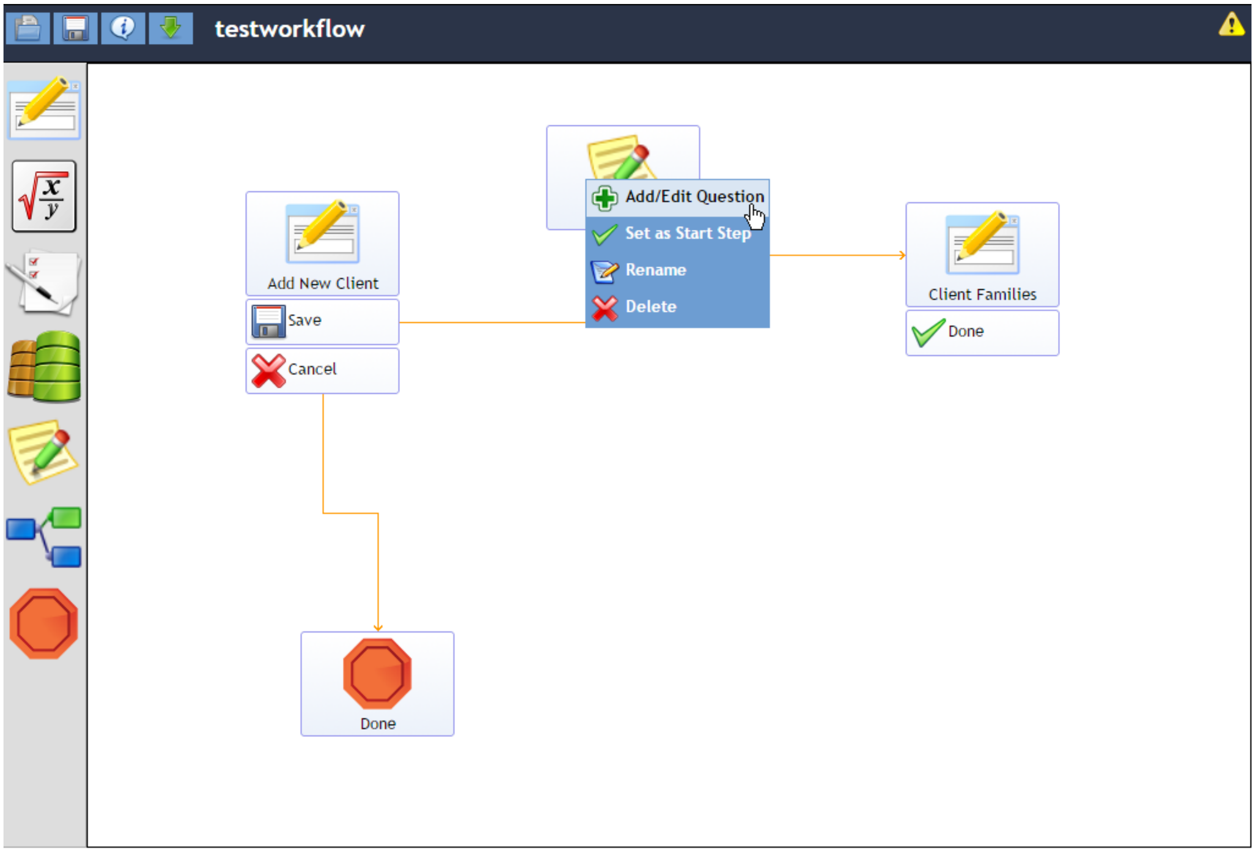
It is recommended to add the "Stop Workflow Control" early in the development of the workflow so that forms can be connected with each step of the workflow. Waiting to do all the linking at the end can lead to confusion and difficulty in resolving the logic flow. Add the Stop Workflow Control by dragging and dropping it from the left side menu into the workspace – typically placing it on the bottom left of the workspace. It is recommended to build the workflow in a circular pattern to more easily follow the logic and flow.



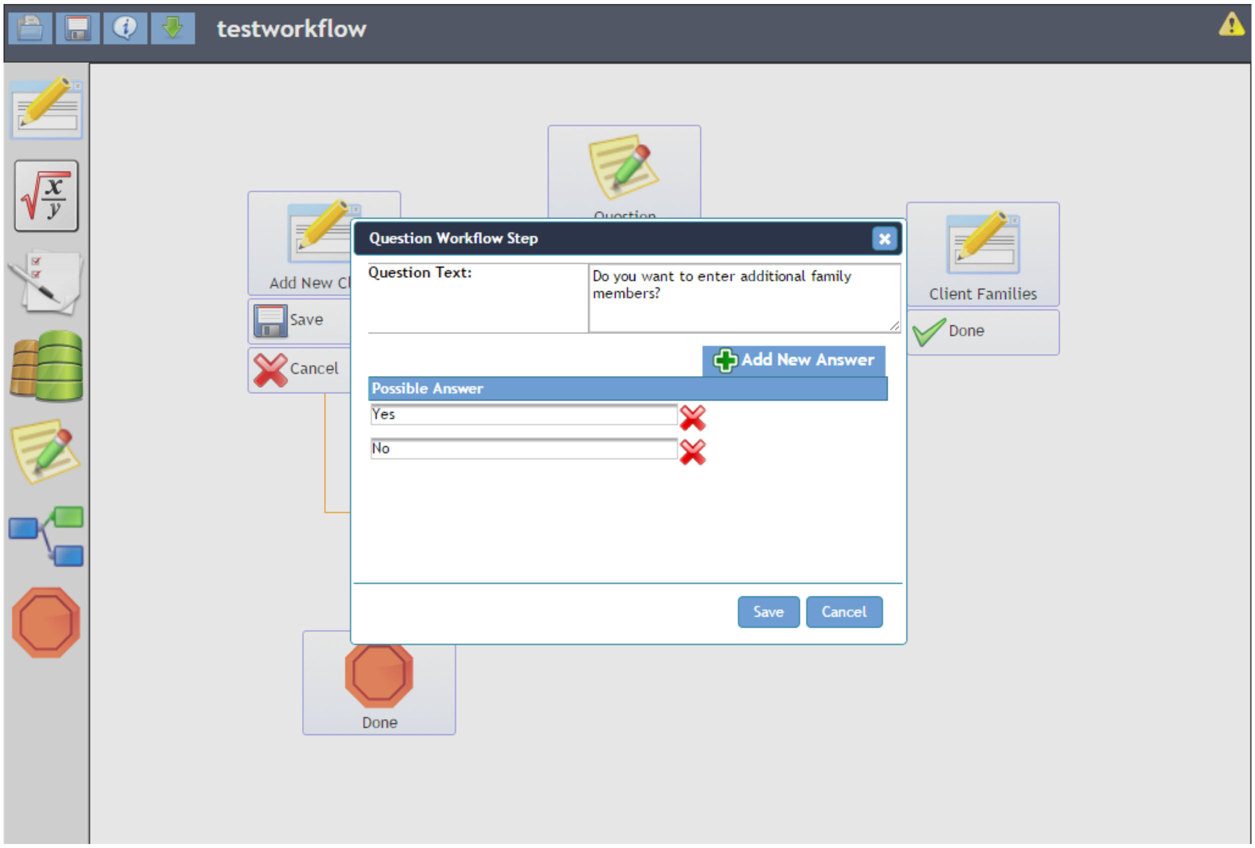
To link steps and create the logic of the flow, click and drag one of the tabs at the bottom of the workflow control to the name of the form or control that the flow should be directed to. In this example, once the Add Client form is saved, the flow carries the user to the Client Families form. If the Add Client form is canceled, the workflow ends and if the "Save" option is selected, the workflow carries the user to the Client Families form. The system displays direction arrows that delineate linkages as tabs are dragged and dropped to the desired destinations.



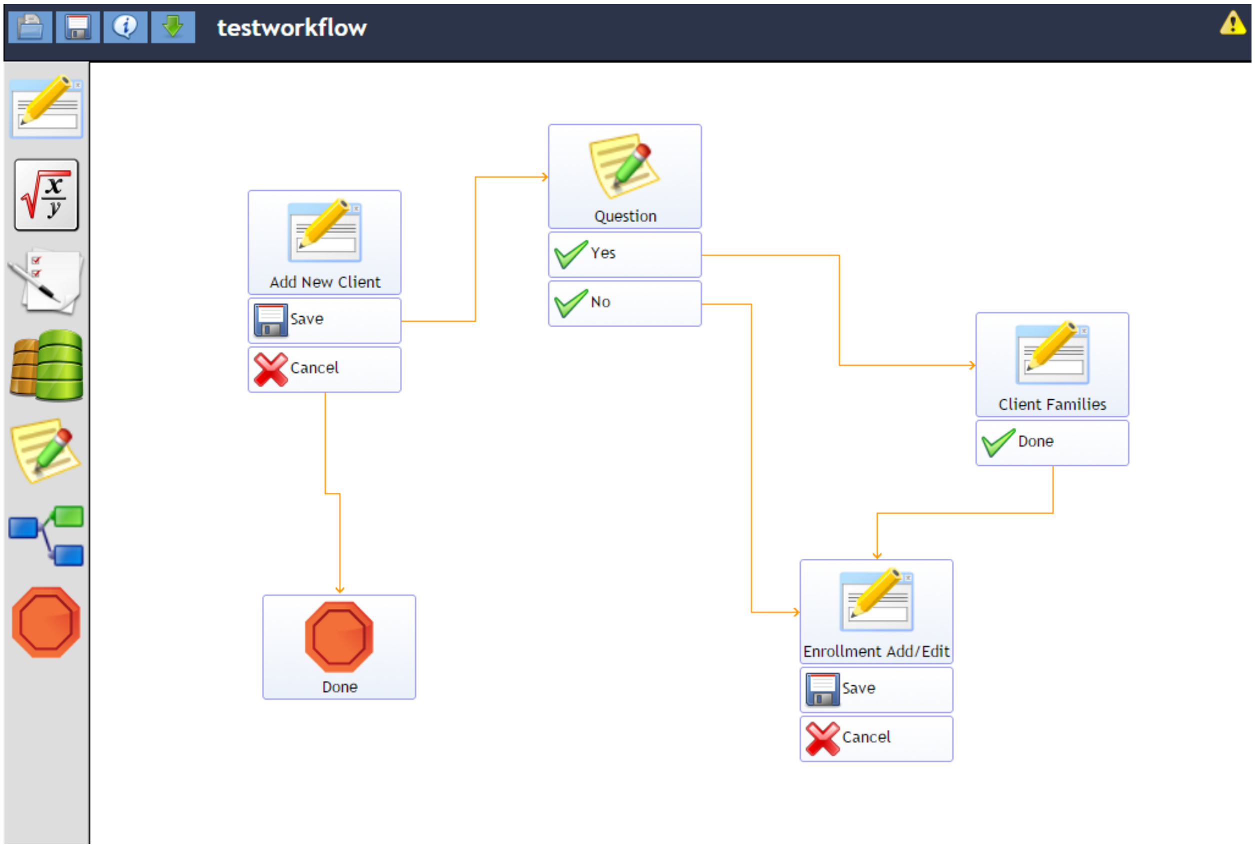
If there are no family members to add, the option to go directly to enrolling the client in the program needs to be available. The Workflow Question Control provides the logic that directs the flow of the process. To set up the Workflow Question Control, drag and drop it onto the workspace. To establish the linkage, drag and drop the tabs at the bottom of the Add Client form to the Workflow Question Control. Keep the "Cancel" tab linked to the Stop Workflow Control. Click on the Workflow Question Control icon to access the options list – select "Add/Edit Question".



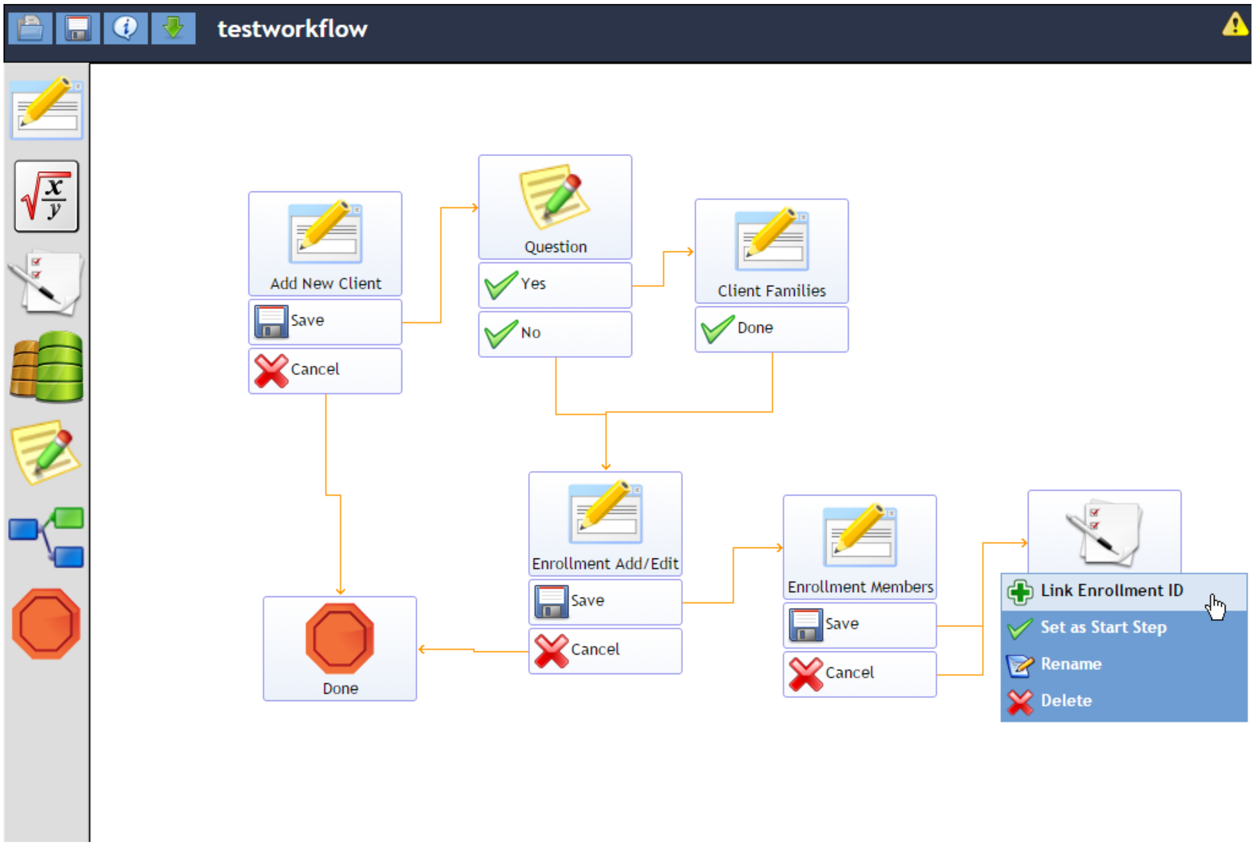
In the Question text box, type in the desired content. Click the “Add New Answer” button to create response options. Type in the desired response text. Click Save when finished.



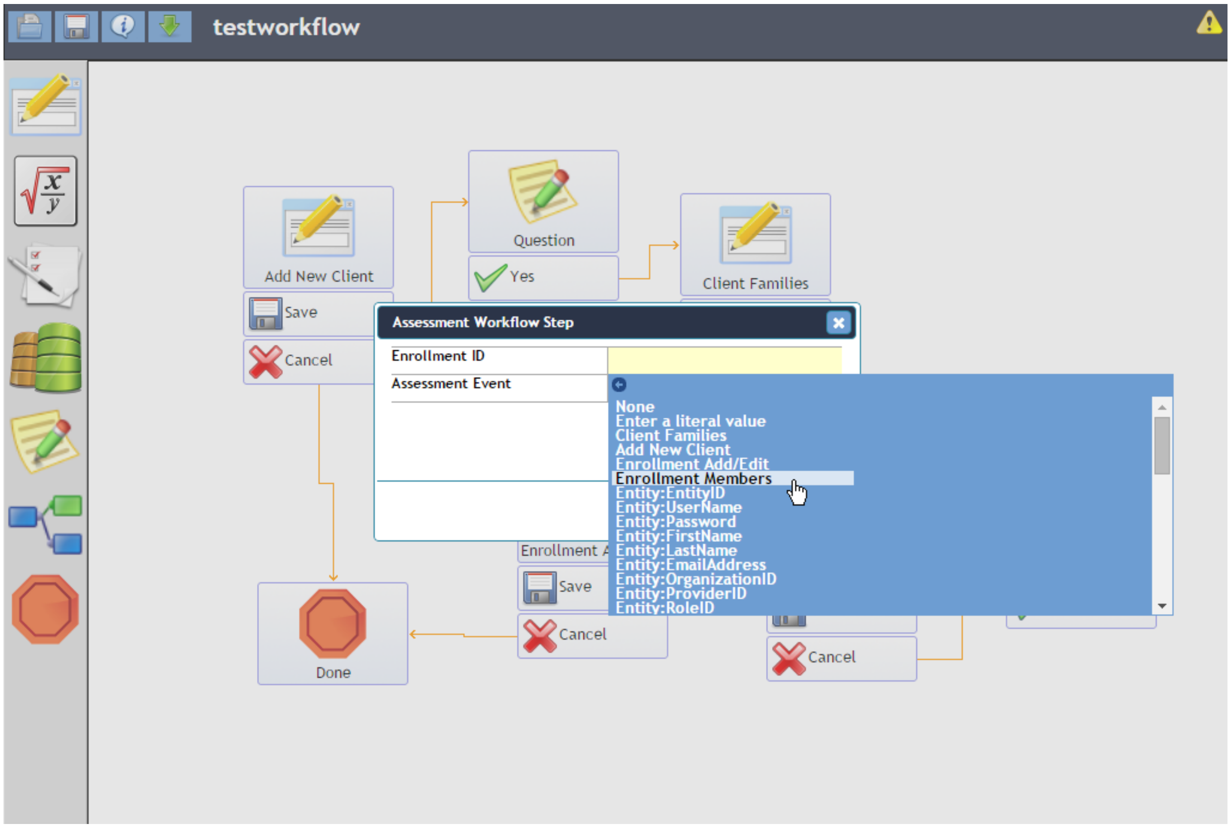
The Workflow Question Control displays with a tab for each entered response option. Click on each tab and drag it to the next workflow step that should occur based on that response.

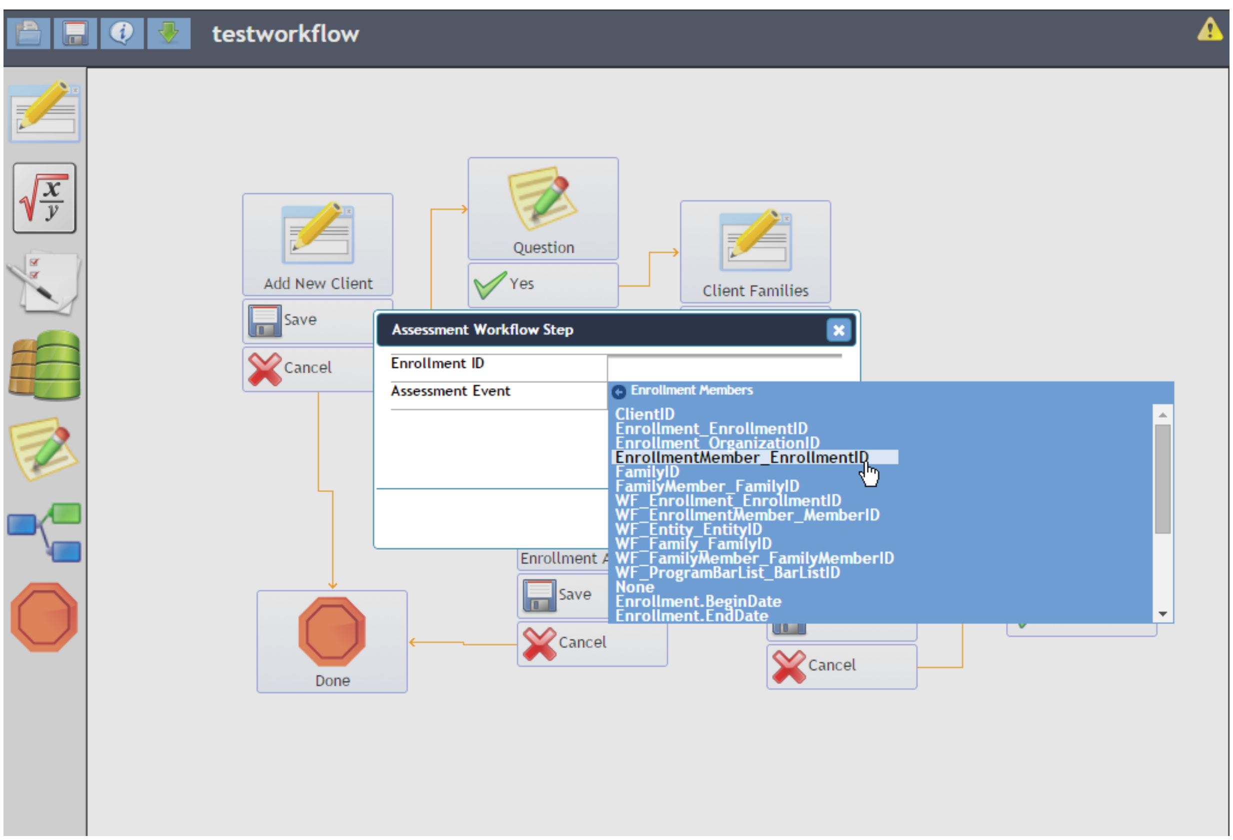


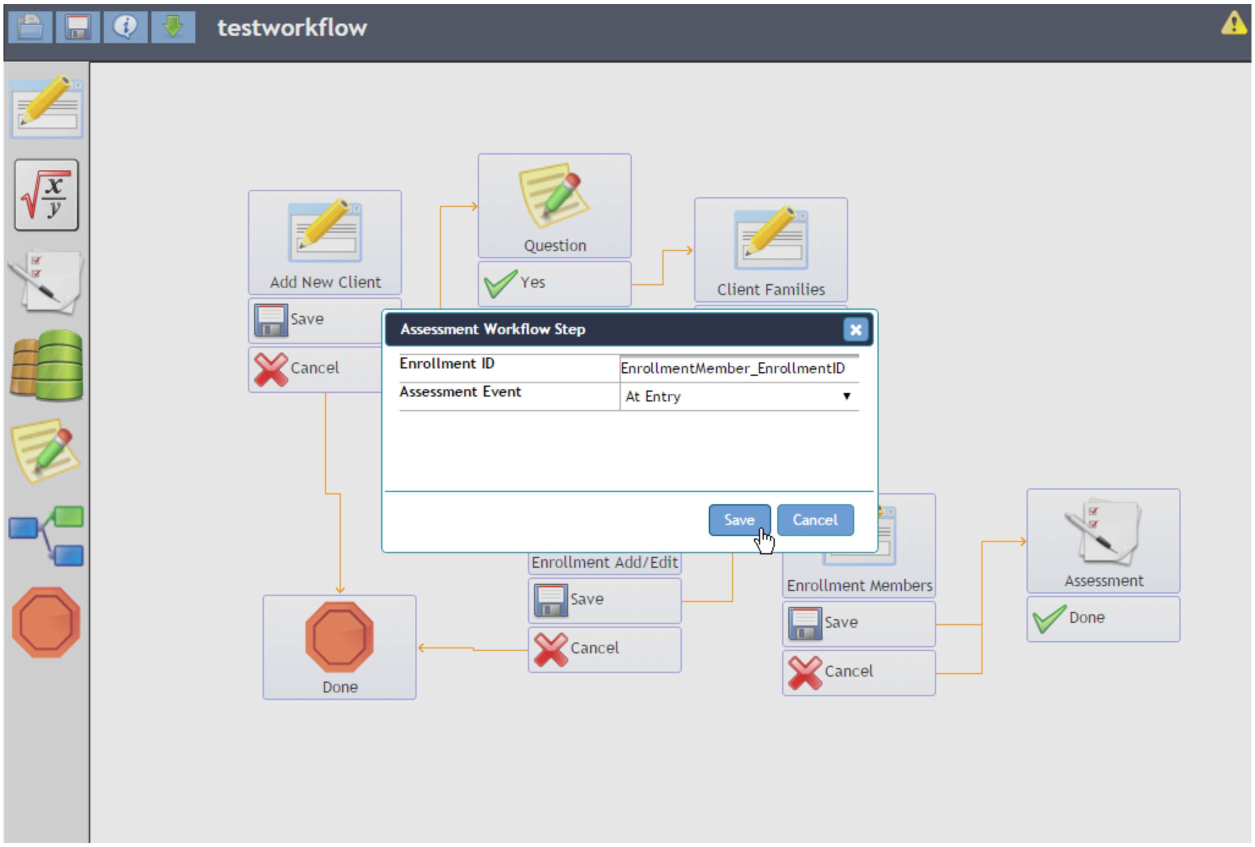
If the workflow is used by any programs that require “Entry” assessments, the Workflow Assessment Control needs to be included in the workflow at some point past the Enrollment Add/Edit or Enrollment Members form. It is typically recommended to place it immediately following the enrollment form if family members are not enrolled and immediately after the enrollment members form if family members are enrolled. To add the Workflow Assessment Control, drag and drop it from the left side menu to the workspace. Click on the control to render the options menu and select “Link Enrollment ID”.



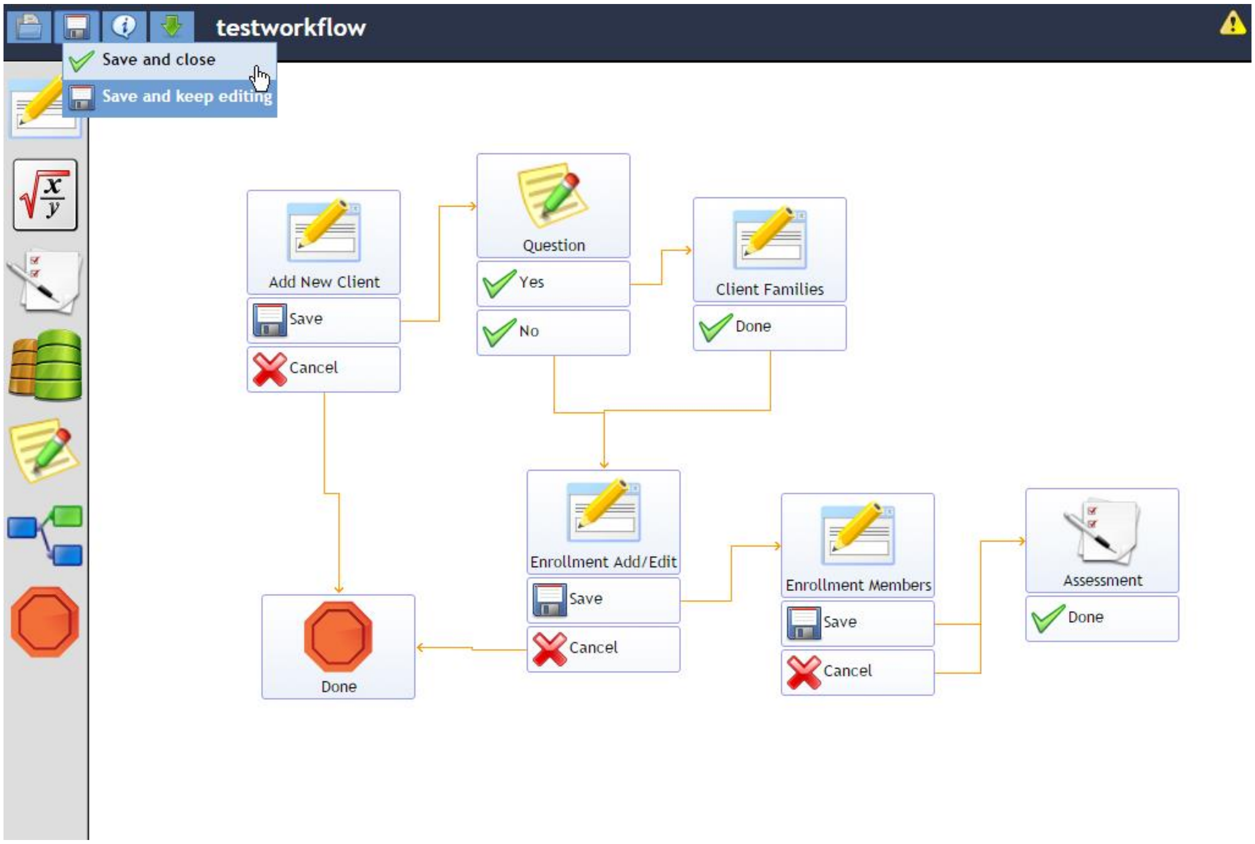
If only the HOH is enrolled in the program, the Enrollment ID is linked from the enrollment form. If family members are enrolled, the Enrollment ID is linked from the Enrollment Members form. Click on the empty field to the right of "Enrollment ID" and click on the appropriate form in the list. When the form list appears, select "Enrollment_EnrollmentID" if only the HOH is enrolled or "EnrollmentMember_EnrollmentID" if family members are enrolled. This is an exception to the rule of using the "WF_" parameter. After mapping the appropriate Enrollment ID, click Save.


testworkflow
Add New Client
Save
Cancel
Question
Yes
Client Families
Assessment Workflow Step
Enrollment ID
Assessment Event
None
Enter a literal value
Client Families
Add New Client
Enrollment Add/Edit
Enrollment Members
Entity:EntityID
Entity:UserName
Entity:Password
Entity:FirstName
Entity:LastName
Entity:EmailAddress
Entity:OrganizationID
Entity:ProviderID
Entity:RoleID
Done


testworkflow
Add New Client
Save
Cancel
Question
Yes
Client Families
Assessment Workflow Step
Enrollment ID
Assessment Event
Enrollment Members
ClientID
Enrollment_EnrollmentID
Enrollment_OrganizationID
EnrollmentMember_EnrollmentID
FamilyID
FamilyMember_FamilyID
WF_Enrollment_EnrollmentID
WF_EnrollmentMember_MemberID
WF_Entity_EntityID
WF_Family_FamilyID
WF_FamilyMember_FamilyMemberID
WF_ProgramBarList_BarListID
None
Enrollment.BeginDate
Enrollment.EndDate
Done



Continuing adding relevant and required forms and workflow controls to the workspace, mapping parameters and linking steps until all desired processes have been included. Be sure to check the icon on the top right of the workflow designer – if all forms are linked in a logical manner, a green checkmark displays. If there is an error in the logic or links are missing, a yellow triangle displays. When finished, click the floppy disc icon and choose “Save and Close”.



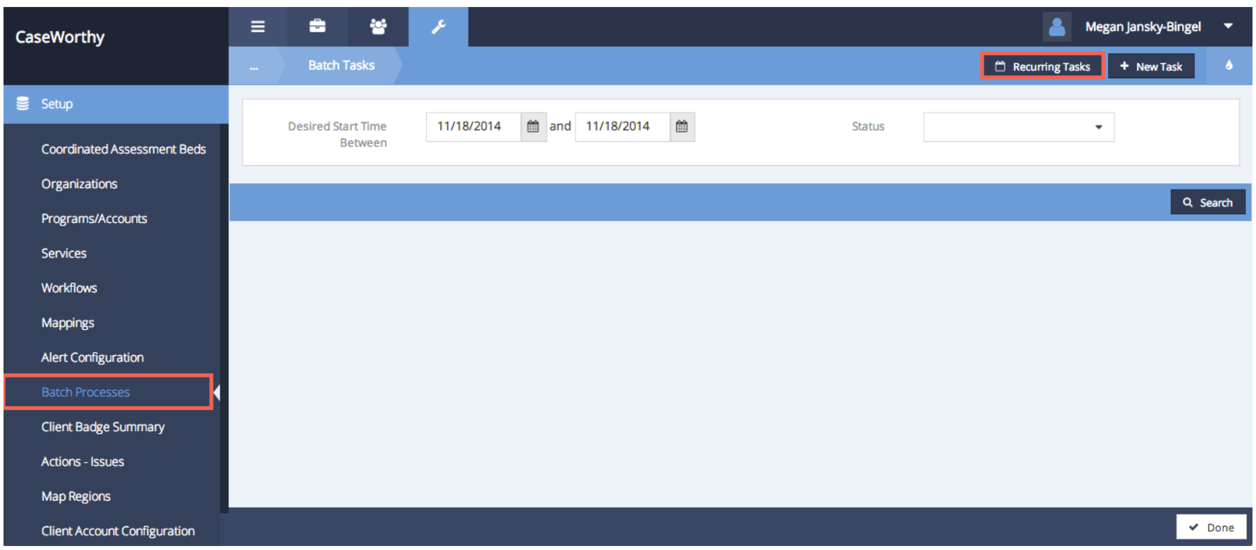
Once the workflow has been created, link it up to the desired menu or button (See the CaseWorthy™ apBuilder™ Guide for more information on linking workflows to menus/buttons) and run it to test it out. If parameters have not been linked correctly errors appears during the workflow. If this occurs, return to the workflow design and adjust the parameter mapping on the affected form – it can sometimes be a process of elimination to find the correct link. After trying various options without success, please contact a CaseWorthy™ Customer Representative.

Batch Processes

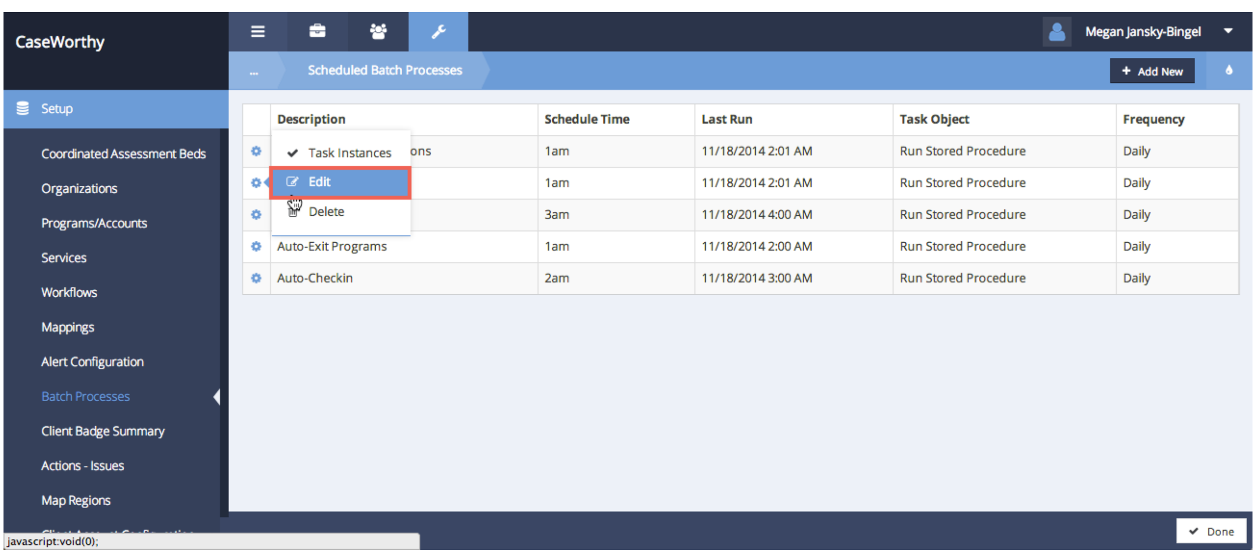
(Administration>Setup>Batch Processes)

Batch processes are stored procedures that are automatically run in CaseWorthy™. They process large amounts of data and are therefore scheduled to run at times when users are not in the system. The scheduled times reflect “server time” – the local time where the servers are located. Because CaseWorthy’s servers are located in Salt Lake City, UT, server time is in the Mountain Time time zone.

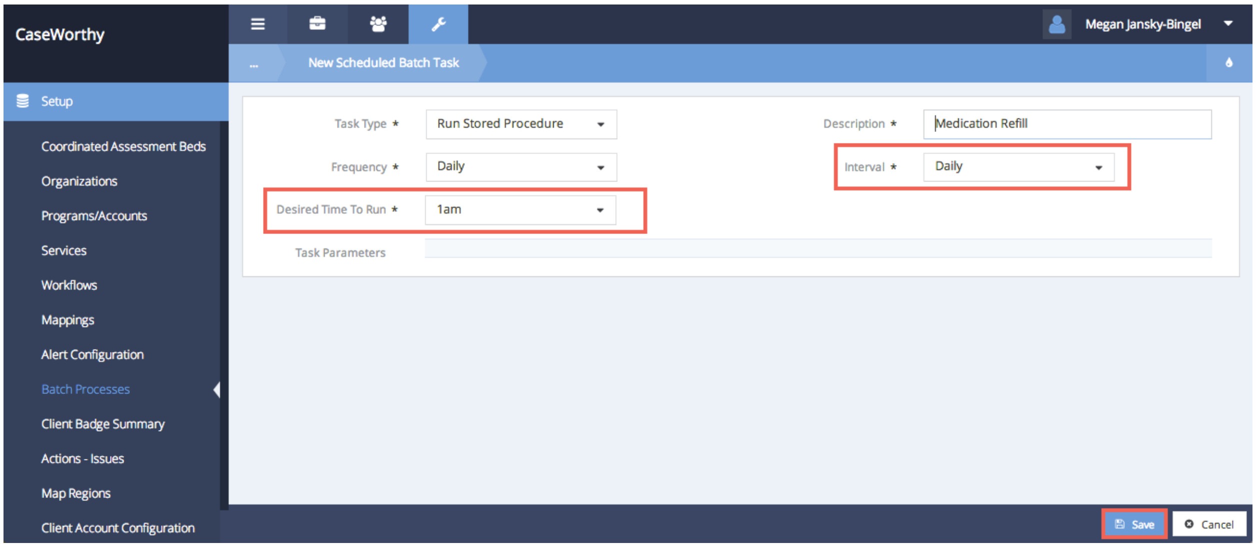
To view current tasks and their schedule, click on the “Recurring Tasks” button on the top right side of the Batch Tasks summary form.



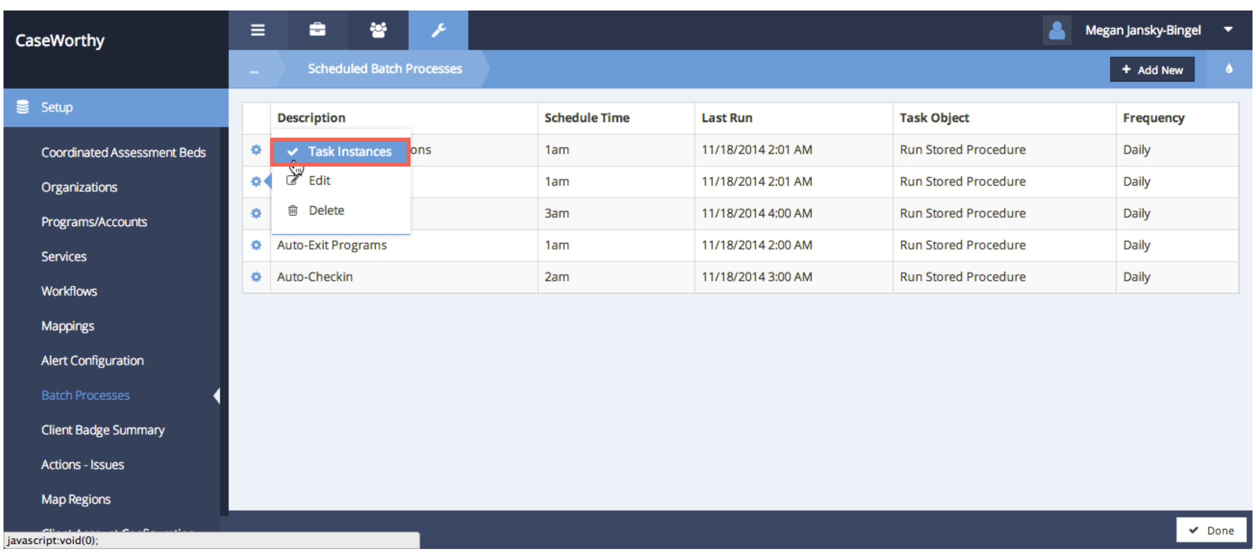
The list of current recurring tasks displays. To edit a task, click on the action gear next to the desired task and select “Edit”.



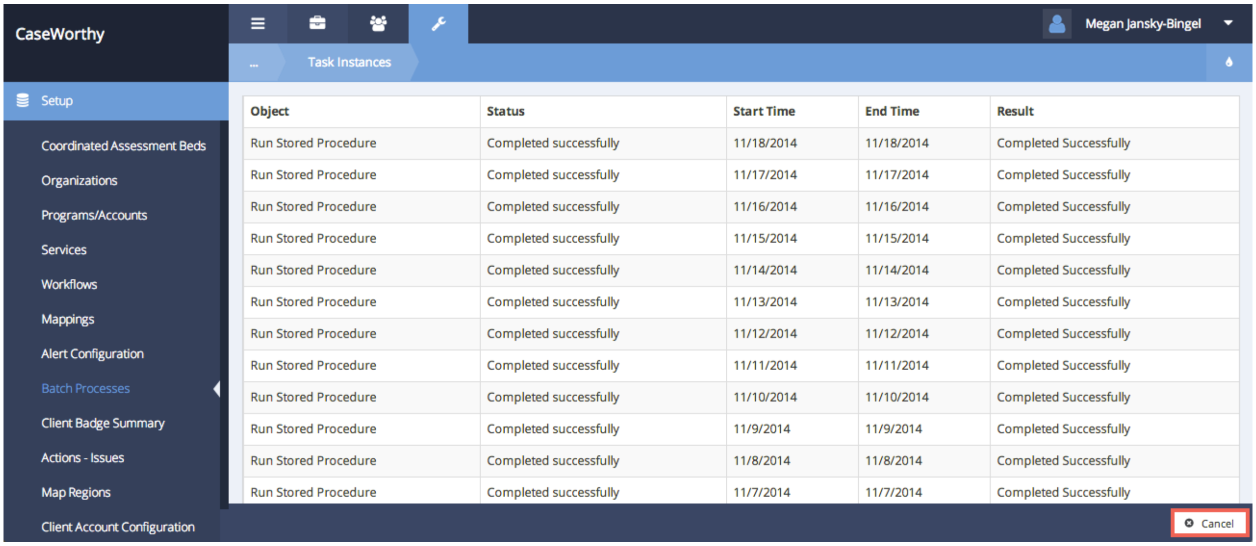
Occasionally, there may be reason to change the “Interval”, though typically the “Desired Time to Run” is the only field that should be edited. It is highly recommended to set it to run at a time that users are not likely to be in the system. Also, remember, the time is relative to where the server is located, which is Mountain Time. When the time and interval are set as desired click the Save button.



The summary form displays. To view the history and status of a batch process, click the action gear next to the desired task and select “Task Instances”.



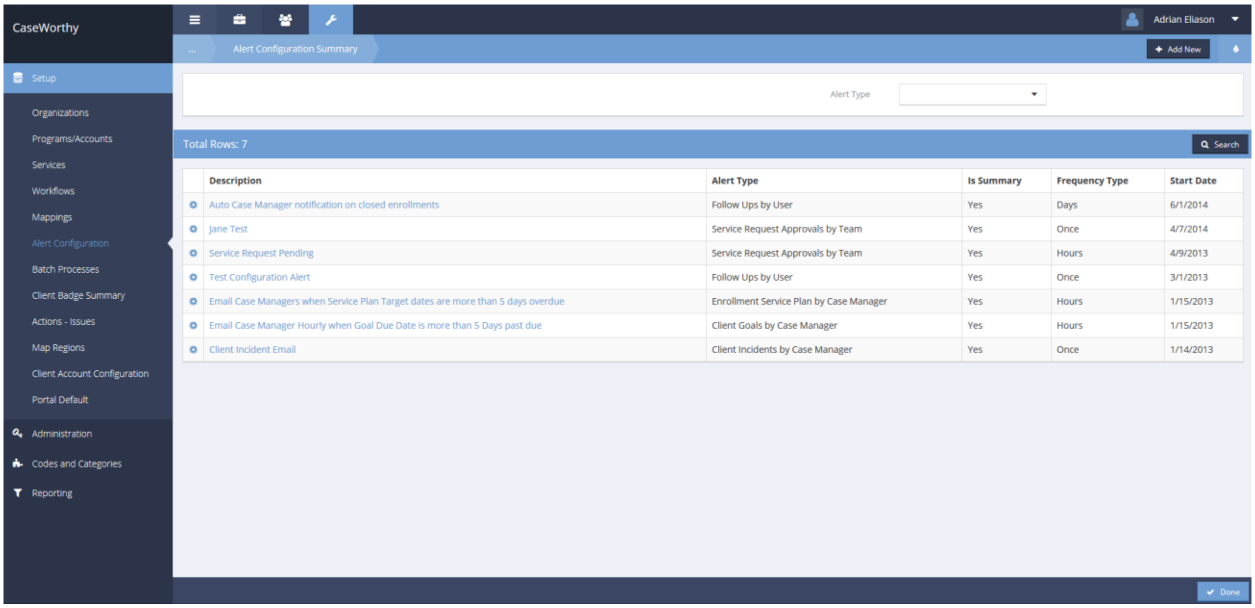
The Task Instances history displays. When finished viewing, click the Cancel button.


CaseWorthy
Megan Jansky-Bingel
...
Task Instances
Setup
Coordinated Assessment Beds
Organizations
Programs/Accounts
Services
Workflows
Mappings
Alert Configuration
Batch Processes
Client Badge Summary
Actions - Issues
Map Regions
Client Account Configuration
Object Status Start Time End Time Result
Run Stored Procedure Completed successfully 11/18/2014 11/18/2014 Completed Successfully
Run Stored Procedure Completed successfully 11/17/2014 11/17/2014 Completed Successfully
Run Stored Procedure Completed successfully 11/16/2014 11/16/2014 Completed Successfully
Run Stored Procedure Completed successfully 11/15/2014 11/15/2014 Completed Successfully
Run Stored Procedure Completed successfully 11/14/2014 11/14/2014 Completed Successfully
Run Stored Procedure Completed successfully 11/13/2014 11/13/2014 Completed Successfully
Run Stored Procedure Completed successfully 11/12/2014 11/12/2014 Completed Successfully
Run Stored Procedure Completed successfully 11/11/2014 11/11/2014 Completed Successfully
Run Stored Procedure Completed successfully 11/10/2014 11/10/2014 Completed Successfully
Run Stored Procedure Completed successfully 11/9/2014 11/9/2014 Completed Successfully
Run Stored Procedure Completed successfully 11/8/2014 11/8/2014 Completed Successfully
Run Stored Procedure Completed successfully 11/7/2014 11/7/2014 Completed Successfully
Cancel

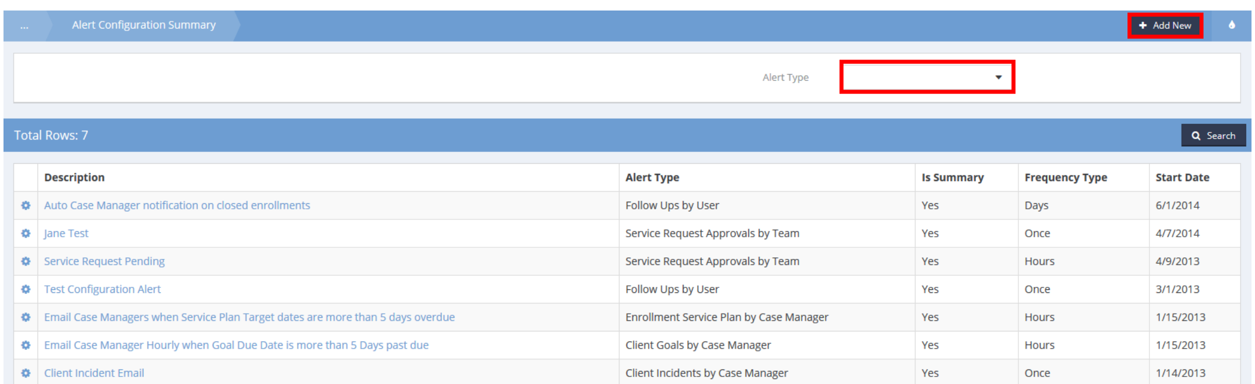
Alert Configuration

(Administration>Setup>Alert Configuration)

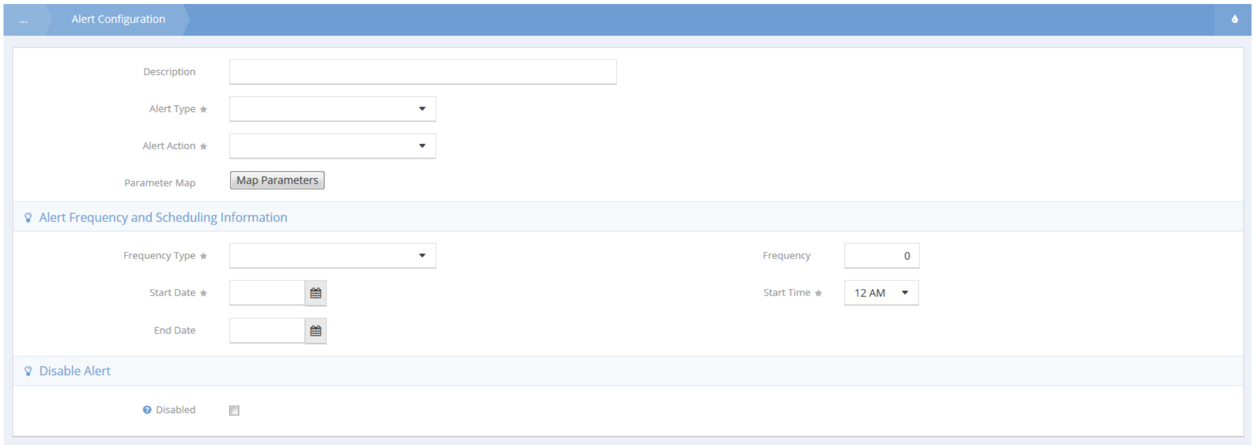
The Alert Configuration form allows the creation and modifying of alerts linked to specific actions.



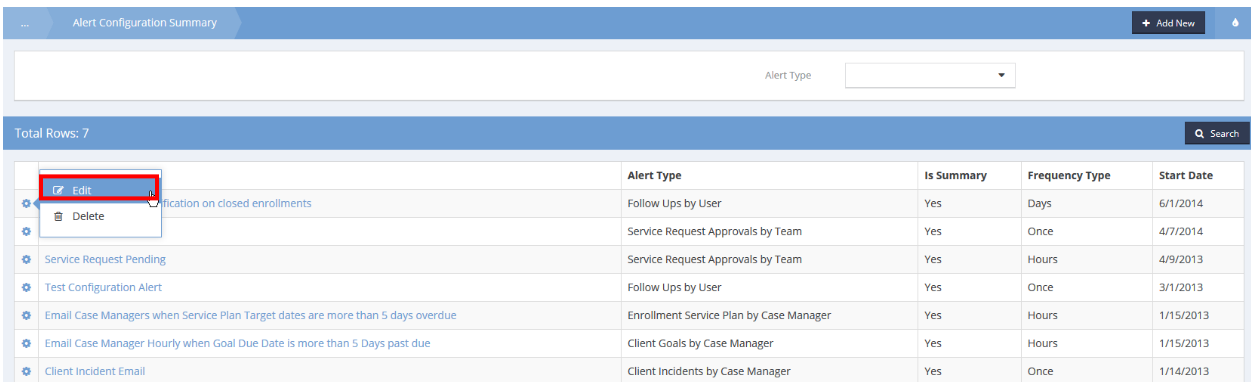
Alert types may be filtered with the alert type drop down list. To create a new alert, click the Add New button. The Alert Configuration form displays.



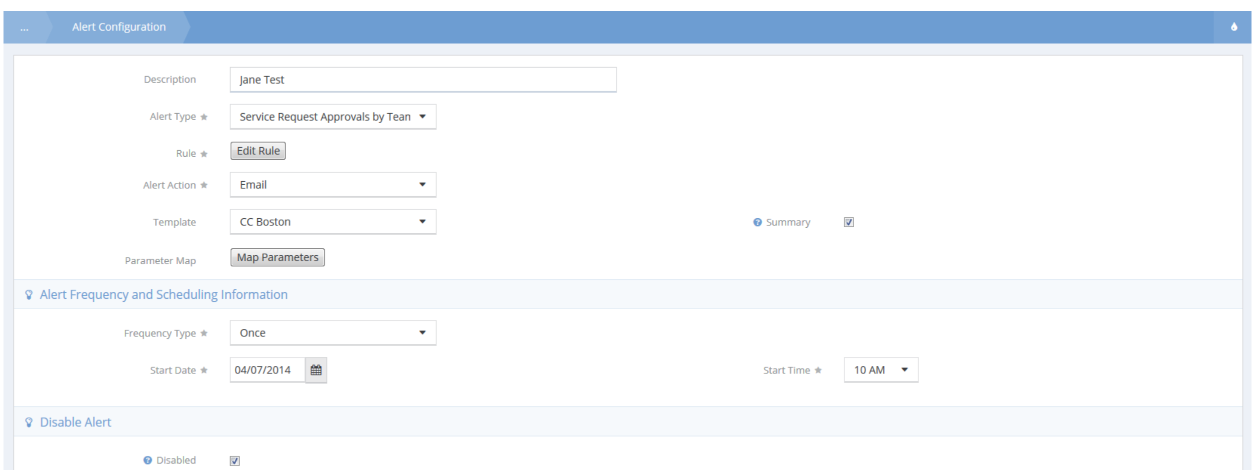
Enter all required parameters. After selecting an alert type an additional field for rule displays which must be entered. After alert type and action have been selected, parameters may be mapped with the Map Parameters button. Click Save when all required fields have been completed. The Alert Configuration Summary form displays.



To edit an existing alert, click the action gear and click Edit.

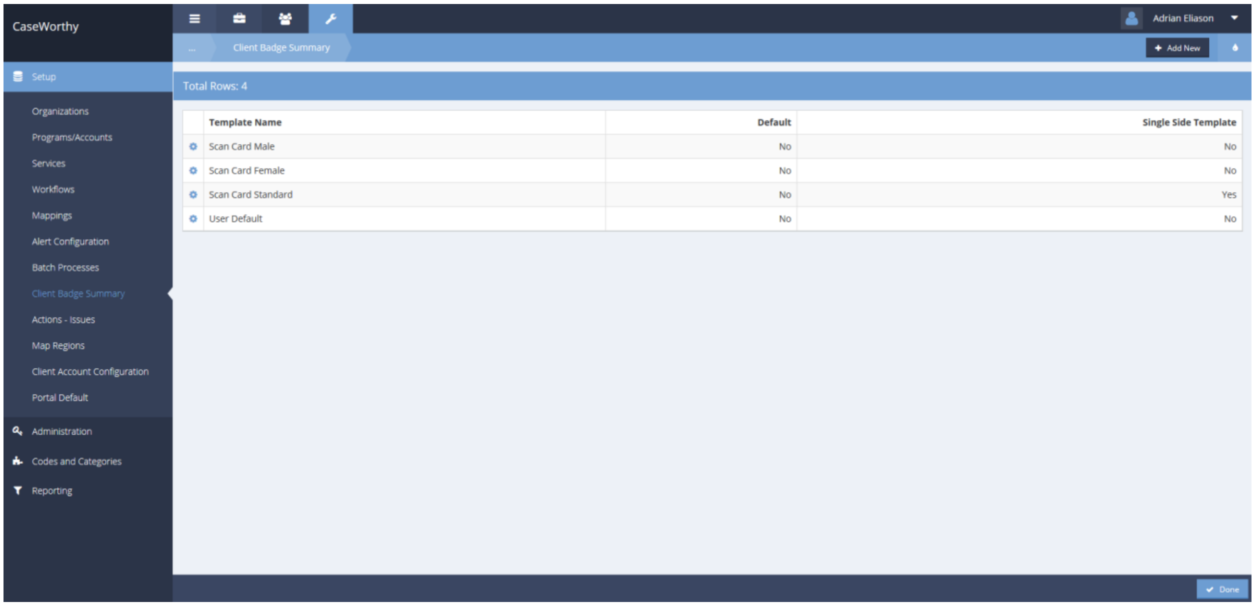


Make any changes and click Save when done.

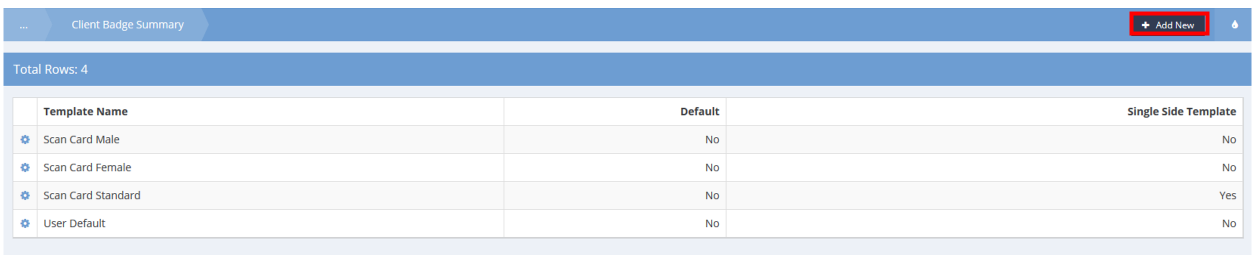


Client Badge Summary

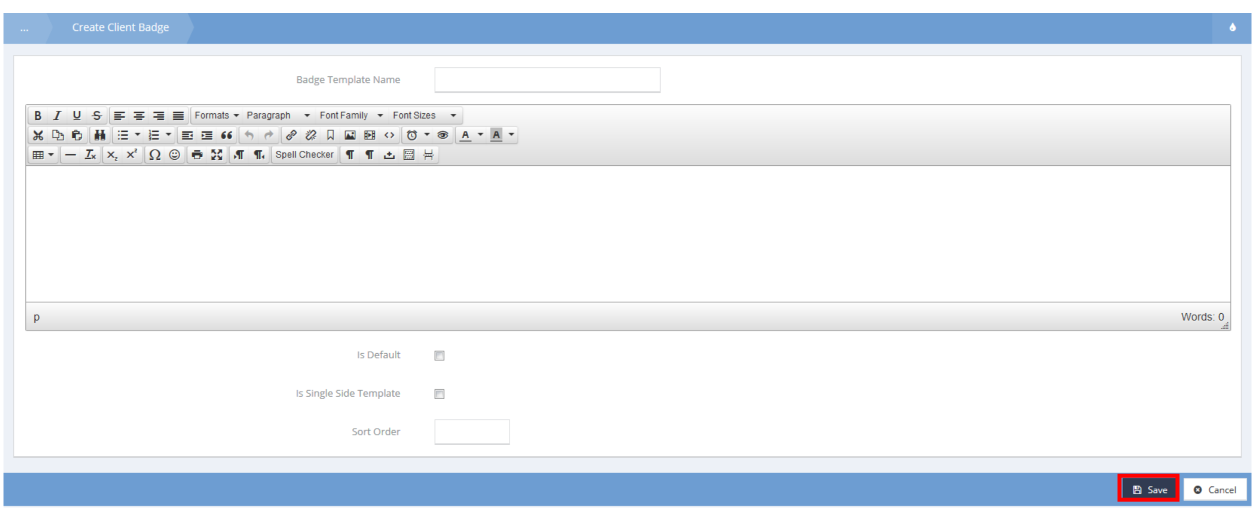
(Administration>Setup>Client Badge Summary)



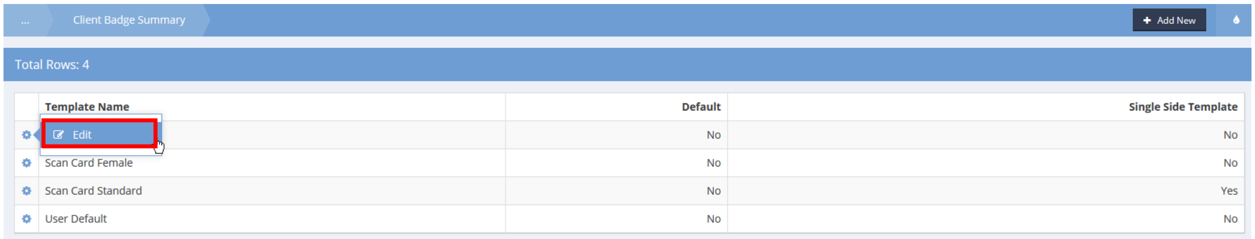
To create a new client badge, click the **+ Add New** button. The Create Client Badge form displays.



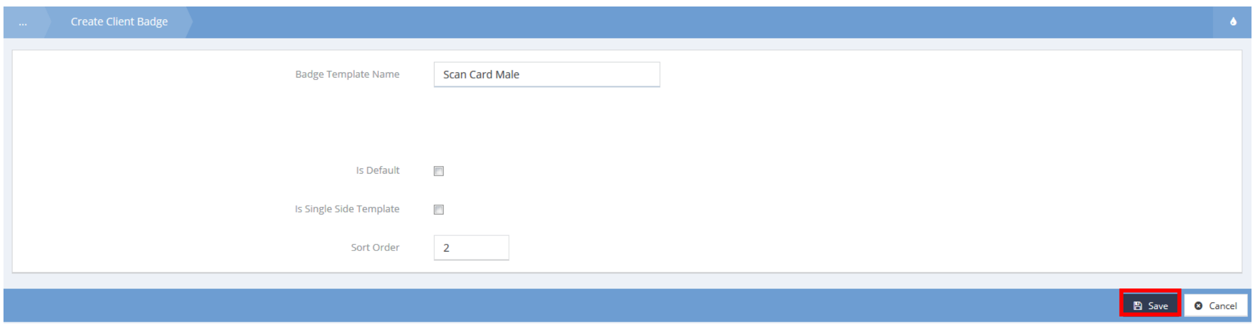
Enter a name and description. Select the checkbox for Is Default and Is Single Side Template if applicable. Enter a number for sort order if necessary. Click **Save**. The Client Badge Summary form displays.



To edit an existing client badge, click the action gear and click Edit. The Create Client Badge form displays.

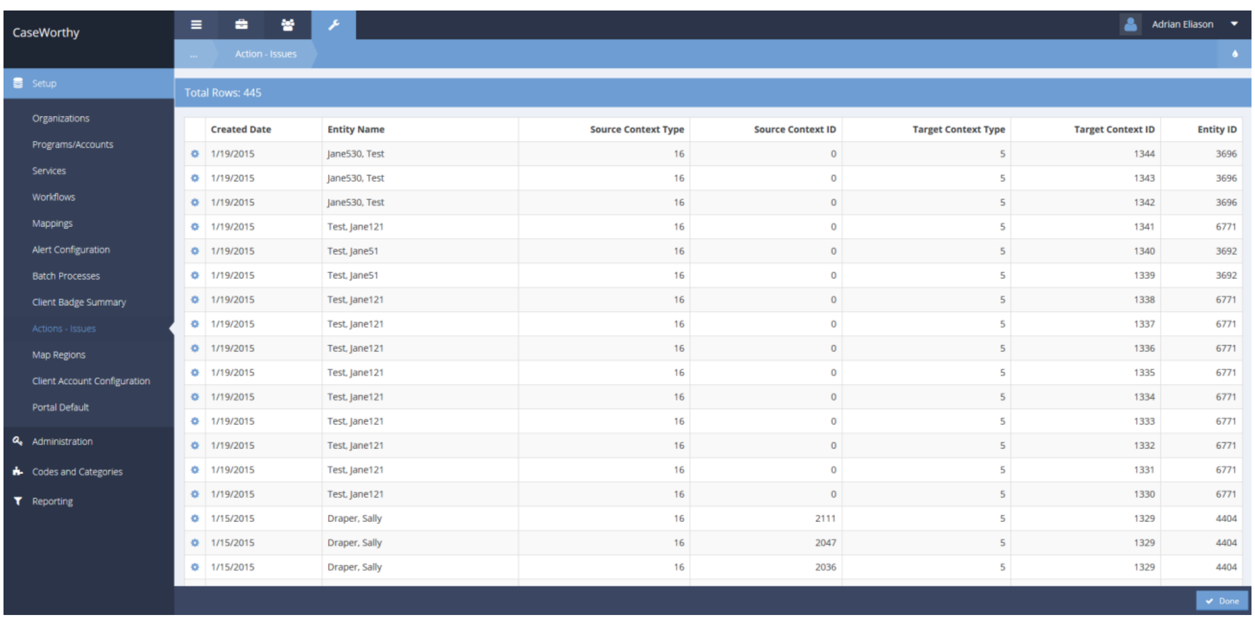


Make any changes and click Save when done.

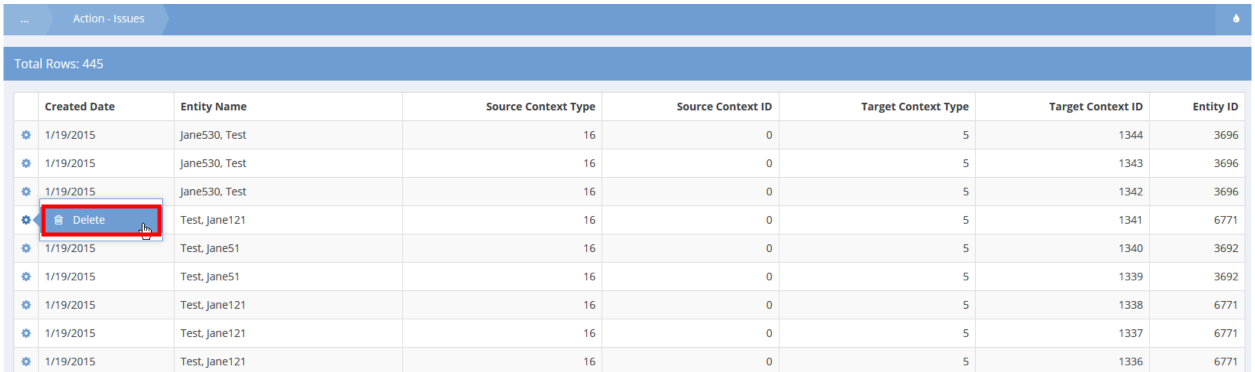


Actions – Issues

(Administration>Setup>Actions – Issues)

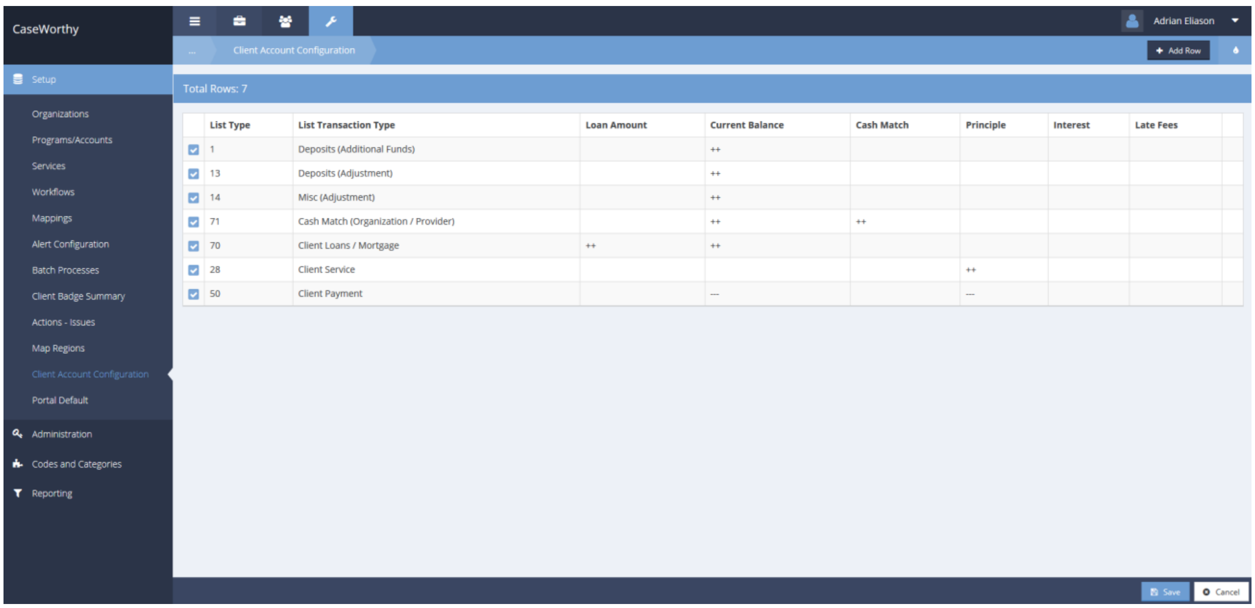


To delete an action, click the action gear and click Delete.

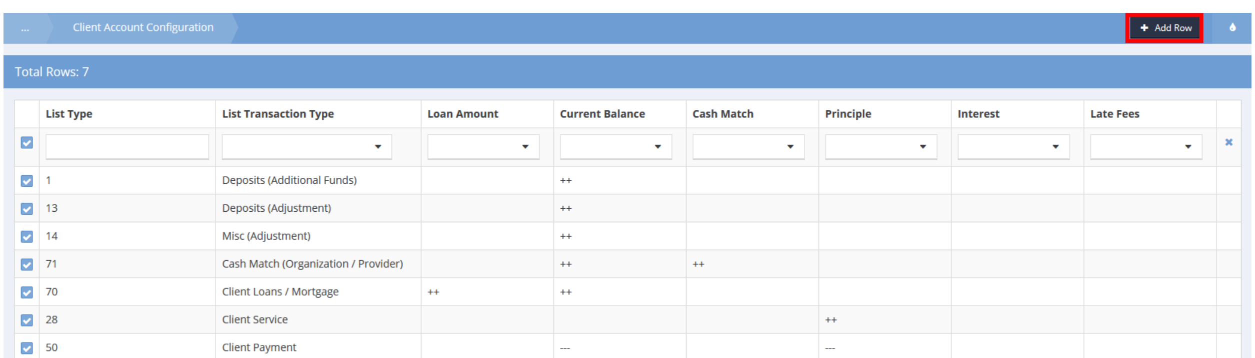


Client Account Configuration

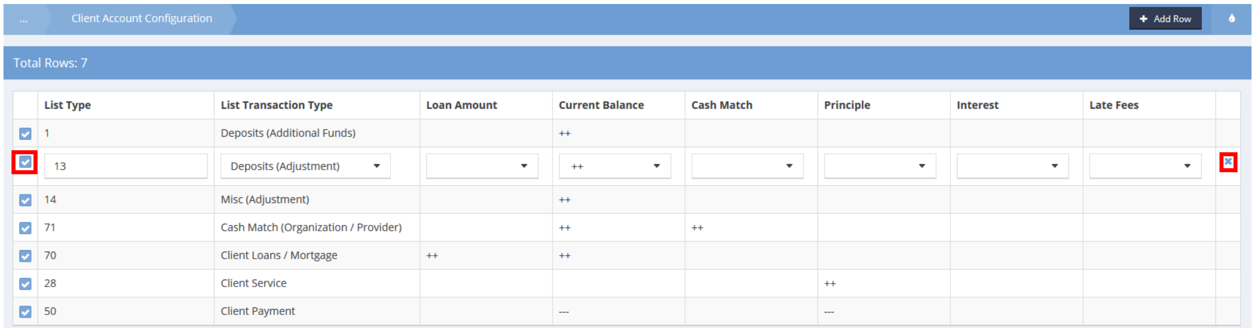
(Administration>Setup>Client Account Configuration)



Click **+ Add Row** to add a row. Select settings from the drop-down lists. Click **Save** when done.

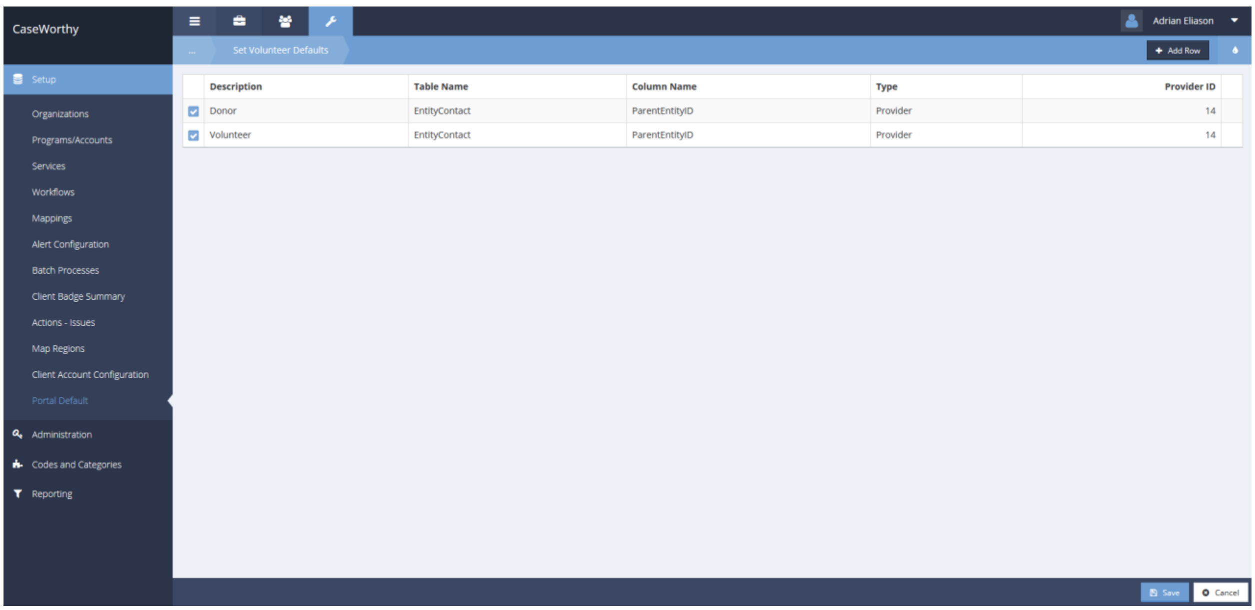


Click the blue checkbox to edit an existing item. The fields expand and can be changed. To delete an item, click the icon and confirm in the pop-up dialog. Click **Save** when done editing.

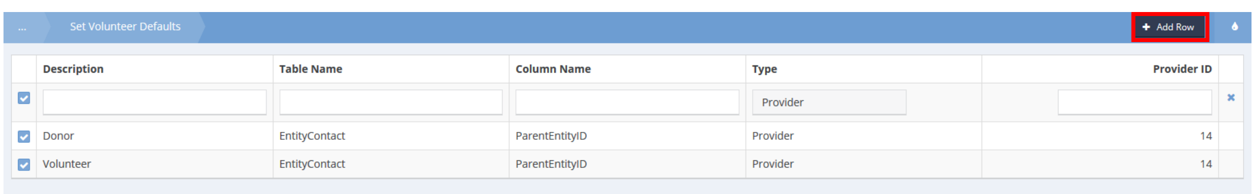


Portal Default

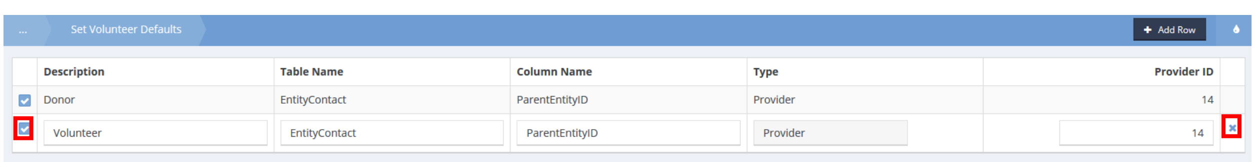
(Administration>Setup>Portal Default)



Click Add Row to add a new type. Enter all the fields and click Save when done.

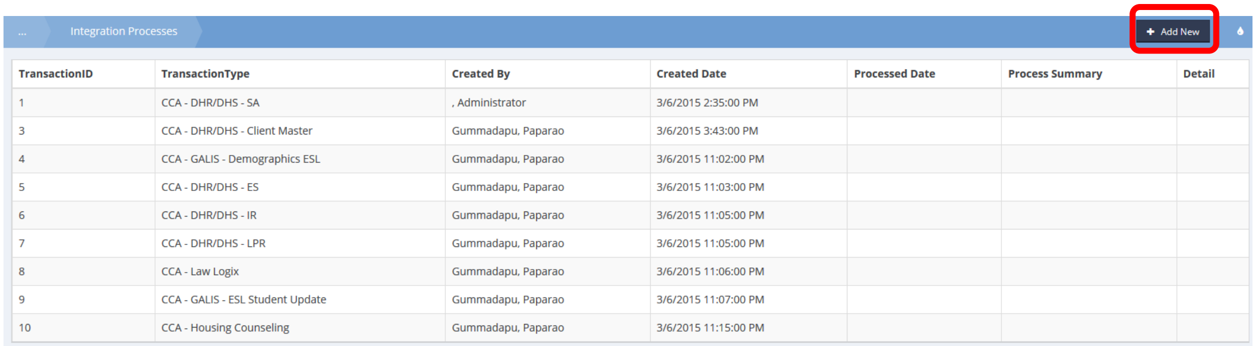


To edit an existing type, click the blue checkbox. The fields expand and can be changed. To delete an item, click the icon and confirm in the pop-up dialog. Click Save when done editing.



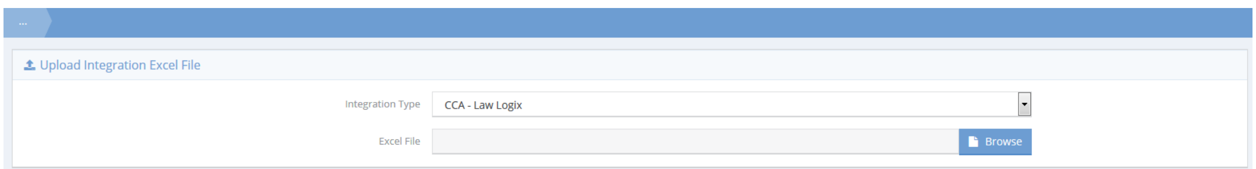
Integration Processes

(Administration>Setup>Integration Processes)



TransactionID	TransactionType	Created By	Created Date	Processed Date	Process Summary	Detail
1	CCA - DHR/DHS - SA	, Administrator	3/6/2015 2:35:00 PM			
3	CCA - DHR/DHS - Client Master	Gummadapu, Paparao	3/6/2015 3:43:00 PM			
4	CCA - GALIS - Demographics ESL	Gummadapu, Paparao	3/6/2015 11:02:00 PM			
5	CCA - DHR/DHS - ES	Gummadapu, Paparao	3/6/2015 11:03:00 PM			
6	CCA - DHR/DHS - IR	Gummadapu, Paparao	3/6/2015 11:05:00 PM			
7	CCA - DHR/DHS - LPR	Gummadapu, Paparao	3/6/2015 11:05:00 PM			
8	CCA - Law Logix	Gummadapu, Paparao	3/6/2015 11:06:00 PM			
9	CCA - GALIS - ESL Student Update	Gummadapu, Paparao	3/6/2015 11:07:00 PM			
10	CCA - Housing Counseling	Gummadapu, Paparao	3/6/2015 11:15:00 PM			

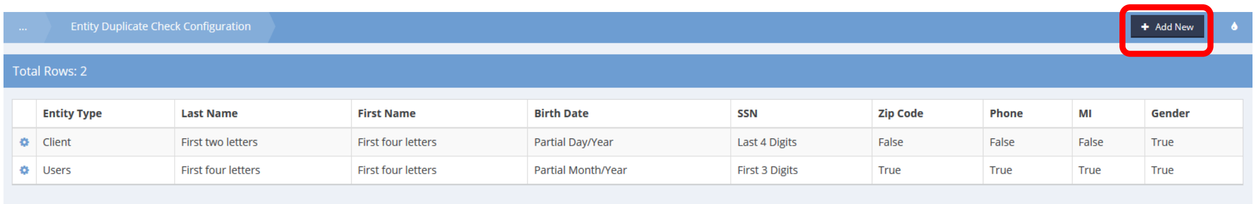
A list of existing integration processes displays. To create a new process, click the Add New button.



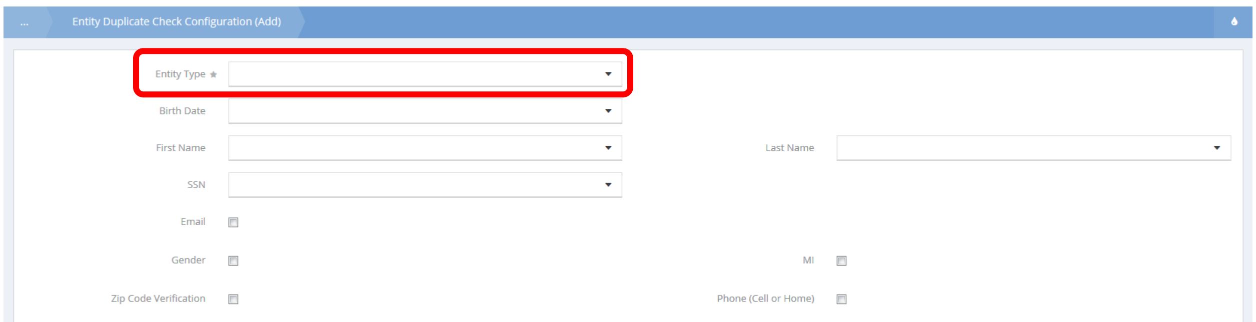
Select an integration type from the drop-down list and click the Browse button to locate the excel file being used. Click the Upload button when finished.

Entity Duplicate Check Configuration

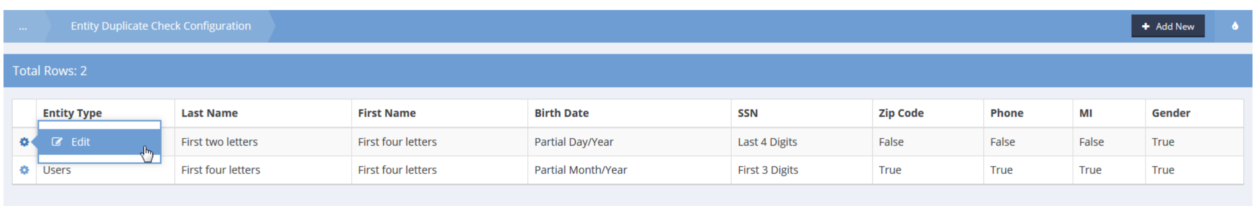
(Administration>Setup>Portal Entity Duplicate Configuration)



To add a new configuration, click the Add New button. The Entity Duplicate Check Configuration (Add) form displays.



Select an Entity Type from the drop-down list and select any desired settings using the drop down lists and checkboxes. Click Save when finished.



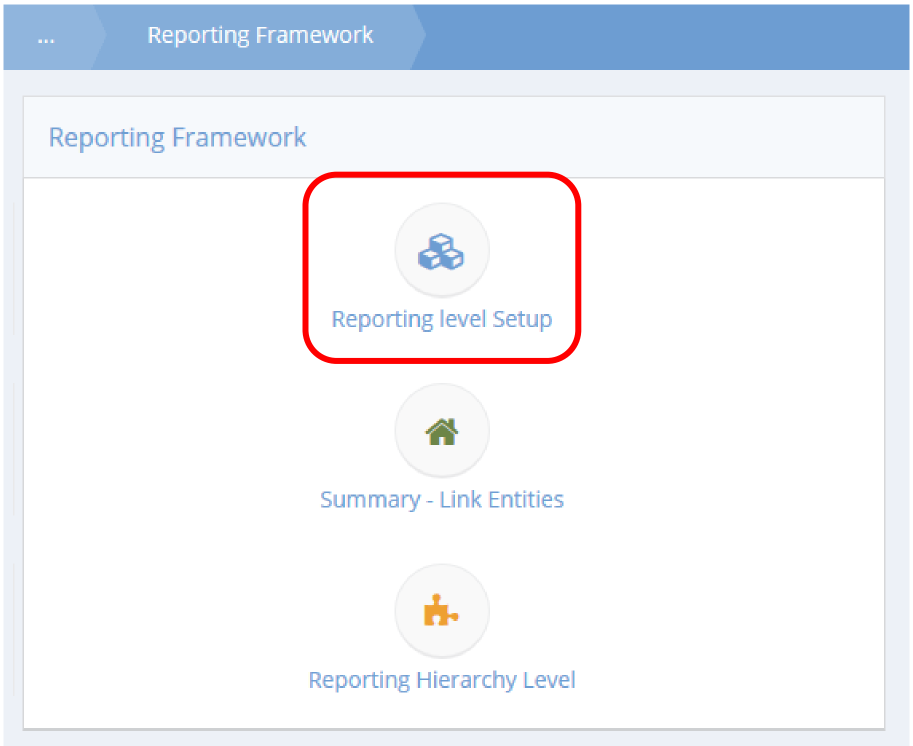
To edit an existing configuration, click the action gear icon and click Edit. The Edit form is the same as the Add form shown above. Make any desired changes and click Save when finished.

Reporting Framework

Reporting Level Setup

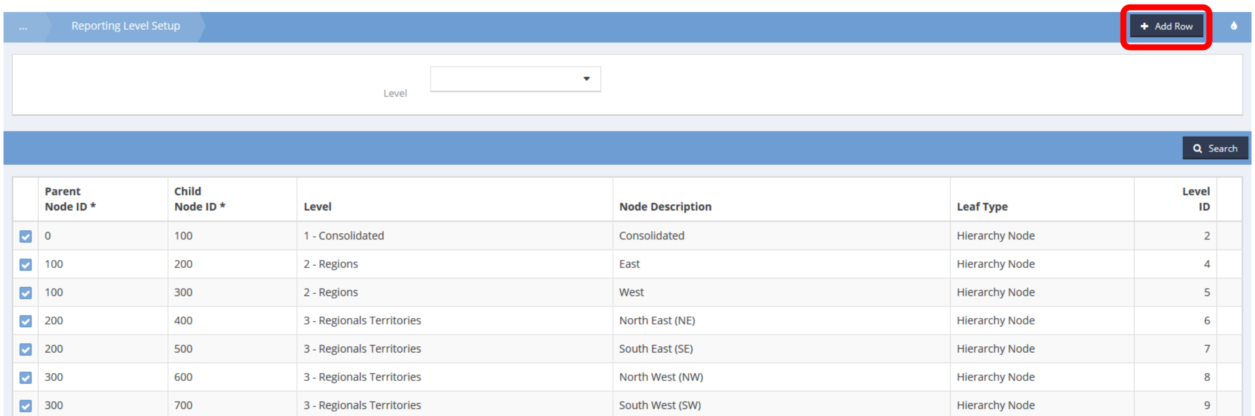
Objective: Access reporting level setup.

Navigation: Administration>Setup>Reporting Framework



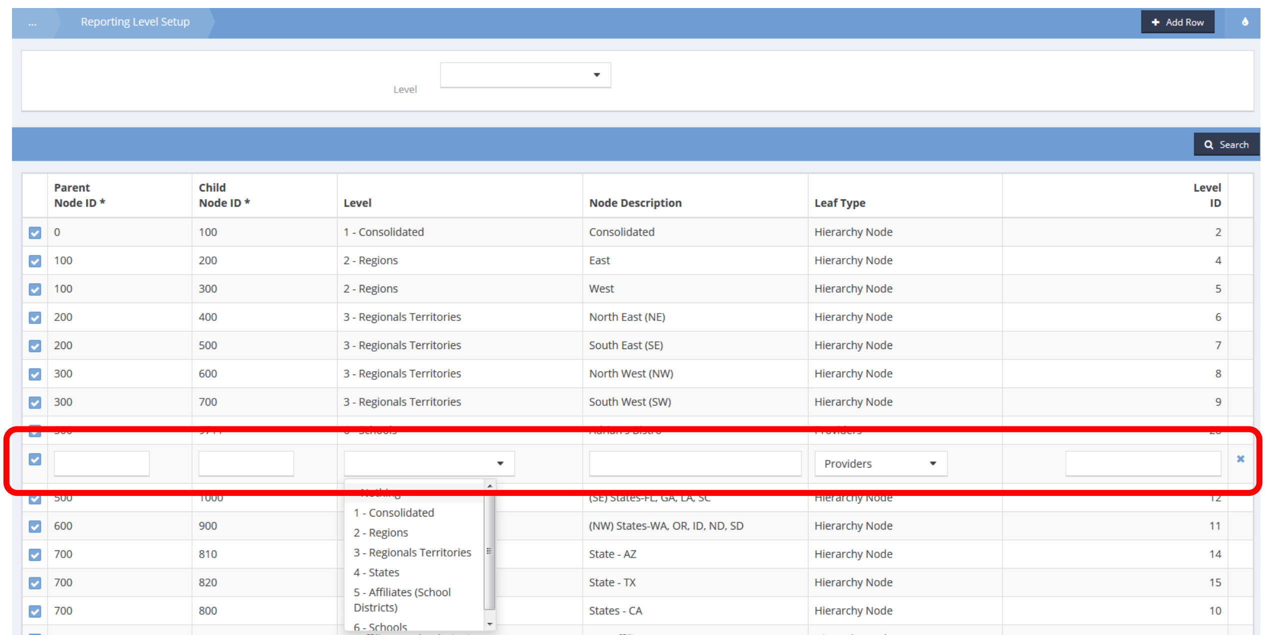
Click the icon for Reporting Level Setup.

The Reporting Level Setup form displays.



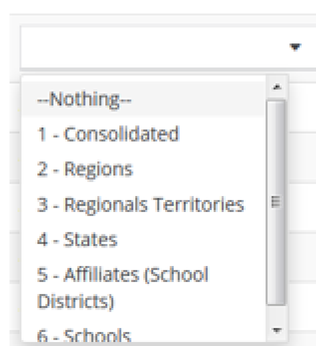
	Parent Node ID *	Child Node ID *	Level	Node Description	Leaf Type	Level ID
☑	0	100	1 - Consolidated	Consolidated	Hierarchy Node	2
☑	100	200	2 - Regions	East	Hierarchy Node	4
☑	100	300	2 - Regions	West	Hierarchy Node	5
☑	200	400	3 - Regionals Territories	North East (NE)	Hierarchy Node	6
☑	200	500	3 - Regionals Territories	South East (SE)	Hierarchy Node	7
☑	300	600	3 - Regionals Territories	North West (NW)	Hierarchy Node	8
☑	300	700	3 - Regionals Territories	South West (SW)	Hierarchy Node	9

Click the **+ Add Row** button. A new, expanded row displays.



	Parent Node ID *	Child Node ID *	Level	Node Description	Leaf Type	Level ID
☑	0	100	1 - Consolidated	Consolidated	Hierarchy Node	2
☑	100	200	2 - Regions	East	Hierarchy Node	4
☑	100	300	2 - Regions	West	Hierarchy Node	5
☑	200	400	3 - Regionals Territories	North East (NE)	Hierarchy Node	6
☑	200	500	3 - Regionals Territories	South East (SE)	Hierarchy Node	7
☑	300	600	3 - Regionals Territories	North West (NW)	Hierarchy Node	8
☑	300	700	3 - Regionals Territories	South West (SW)	Hierarchy Node	9
☑					Providers	
☑	500	1000		(SE) States-FL, GA, LA, SC	Hierarchy Node	12
☑	600	900		(NW) States-WA, OR, ID, ND, SD	Hierarchy Node	11
☑	700	810		State - AZ	Hierarchy Node	14
☑	700	820		State - TX	Hierarchy Node	15
☑	700	800		States - CA	Hierarchy Node	10

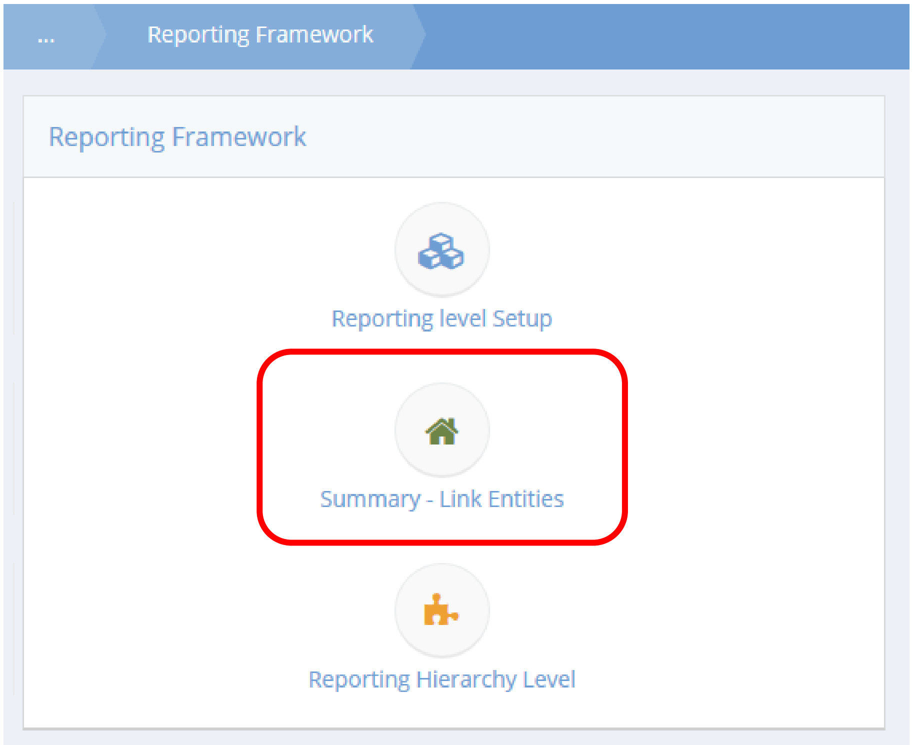
Enter a parent node ID, child node ID, select a level from the drop-down list, and enter a description. Click **Save** when finished.



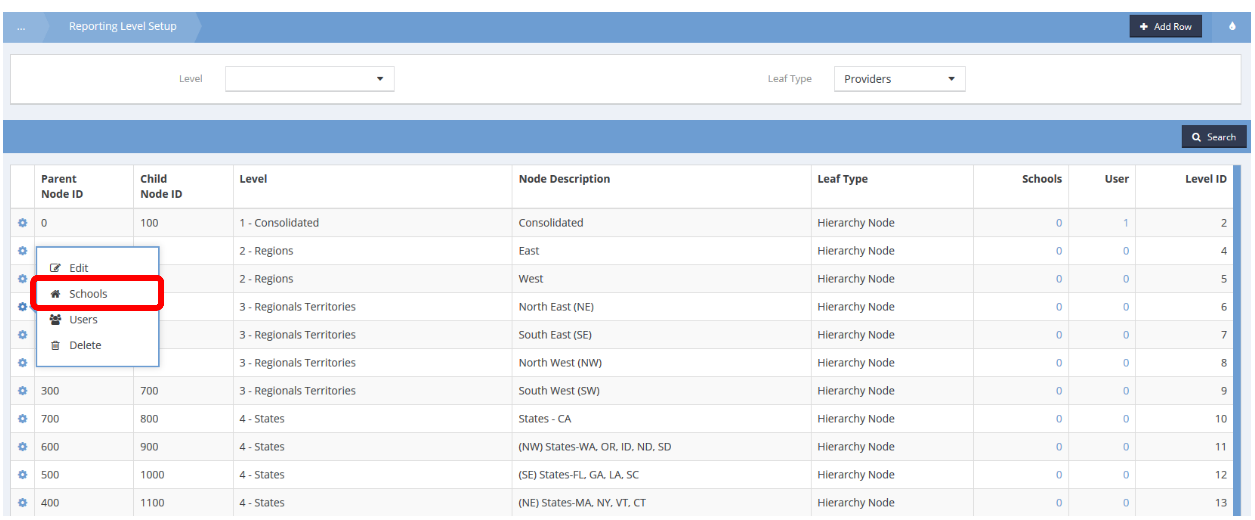
Link Providers to Reporting Levels

Objective: Link a provider to a reporting level.

Navigation: Administration>Setup>Reporting Framework



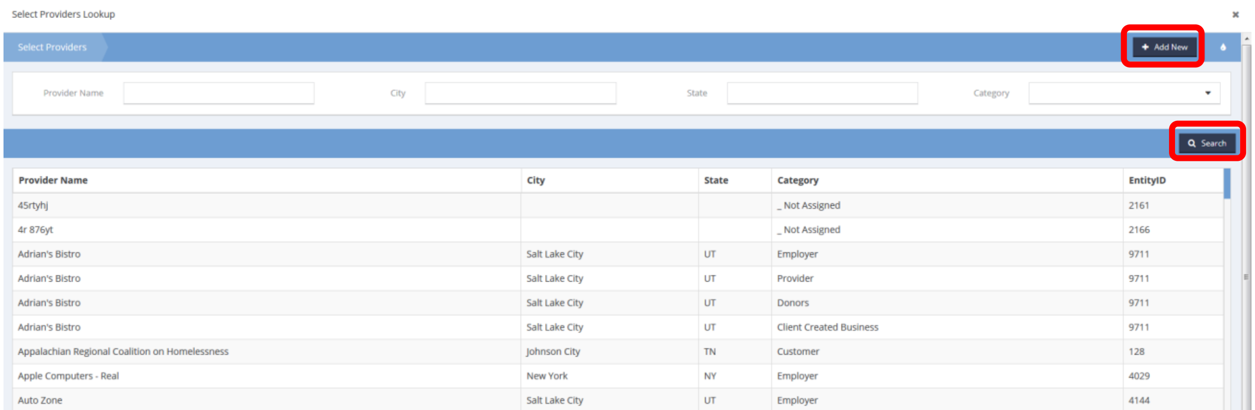
Click the icon for Summary – Link Entities. The Reporting Level Setup form displays.



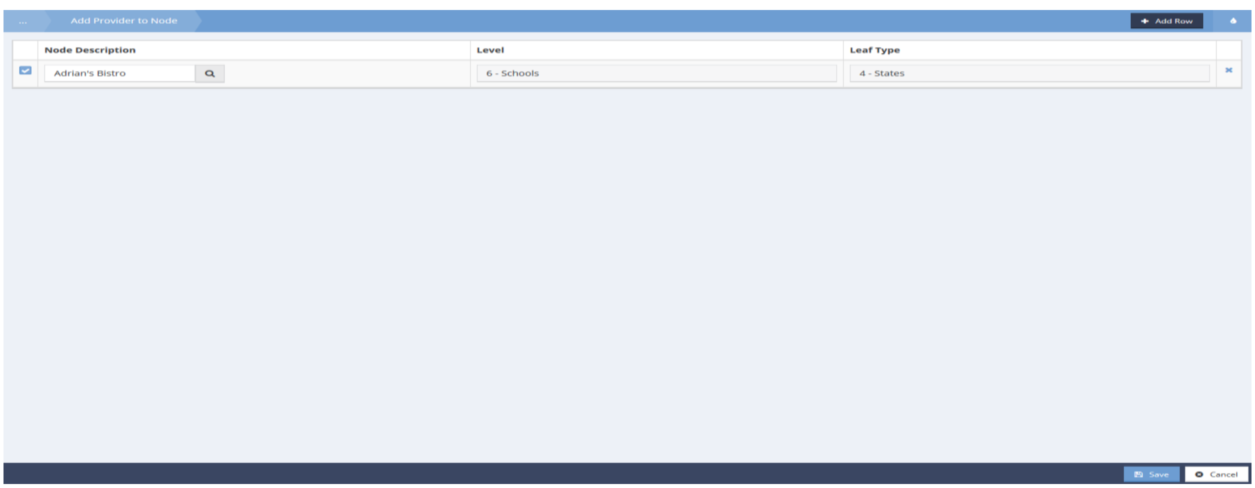
	Parent Node ID	Child Node ID	Level	Node Description	Leaf Type	Schools	User	Level ID
	0	100	1 - Consolidated	Consolidated	Hierarchy Node	0	1	2
			2 - Regions	East	Hierarchy Node	0	0	4
			2 - Regions	West	Hierarchy Node	0	0	5
			3 - Regionals Territories	North East (NE)	Hierarchy Node	0	0	6
			3 - Regionals Territories	South East (SE)	Hierarchy Node	0	0	7
			3 - Regionals Territories	North West (NW)	Hierarchy Node	0	0	8
	300	700	3 - Regionals Territories	South West (SW)	Hierarchy Node	0	0	9
	700	800	4 - States	States - CA	Hierarchy Node	0	0	10
	600	900	4 - States	(NW) States-WA, OR, ID, ND, SD	Hierarchy Node	0	0	11
	500	1000	4 - States	(SE) States-FL, GA, LA, SC	Hierarchy Node	0	0	12
	400	1100	4 - States	(NE) States-MA, NY, VT, CT	Hierarchy Node	0	0	13

Click the action gear icon associated with the desired parent node and select Schools from the popup menu that appears. The Add Provider to Node form displays.

To add a provider, click the Add Row button. Click the magnifying glass lookup icon on the new row. The Select Providers Lookup form displays.



Use the search fields and Search button to locate the desired provider and select it when located. Alternatively, click the Add New button to create a new provider.

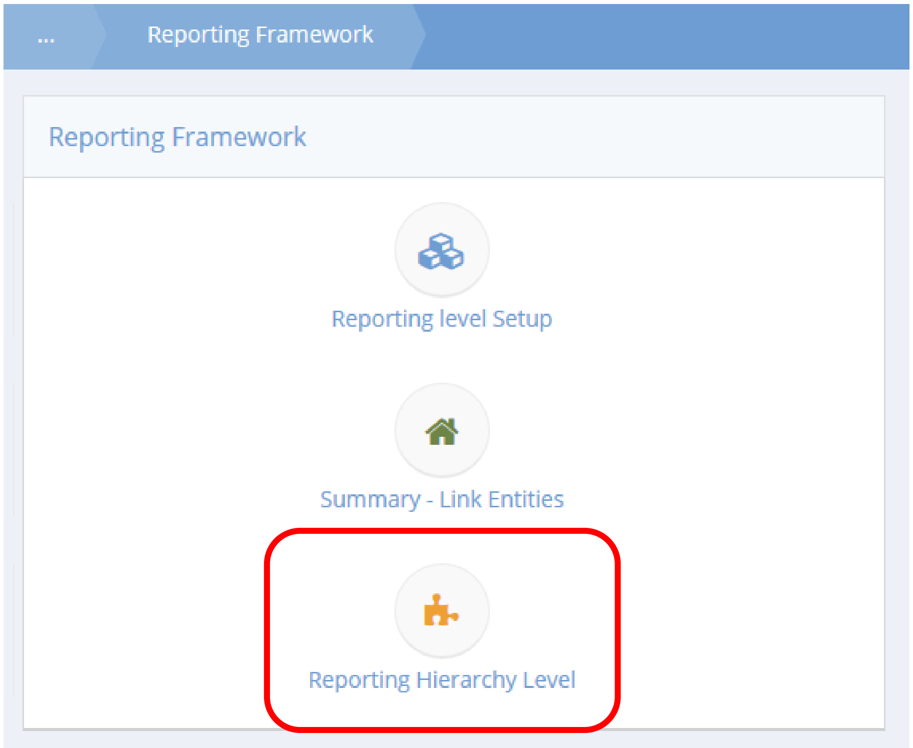


When a provider has been selected the name appears in the new row. Click the Save button when finished.

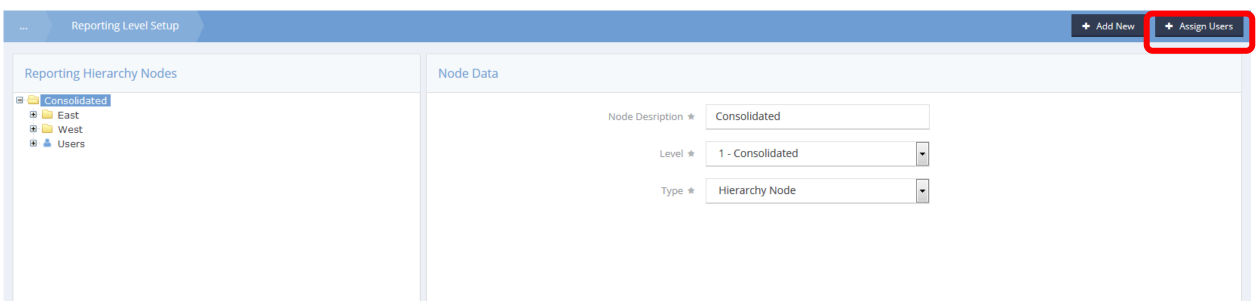
Reporting Hierarchy Users

Objective: Assign a user to a reporting hierarchy.

Navigation: Administration>Setup>Reporting Framework

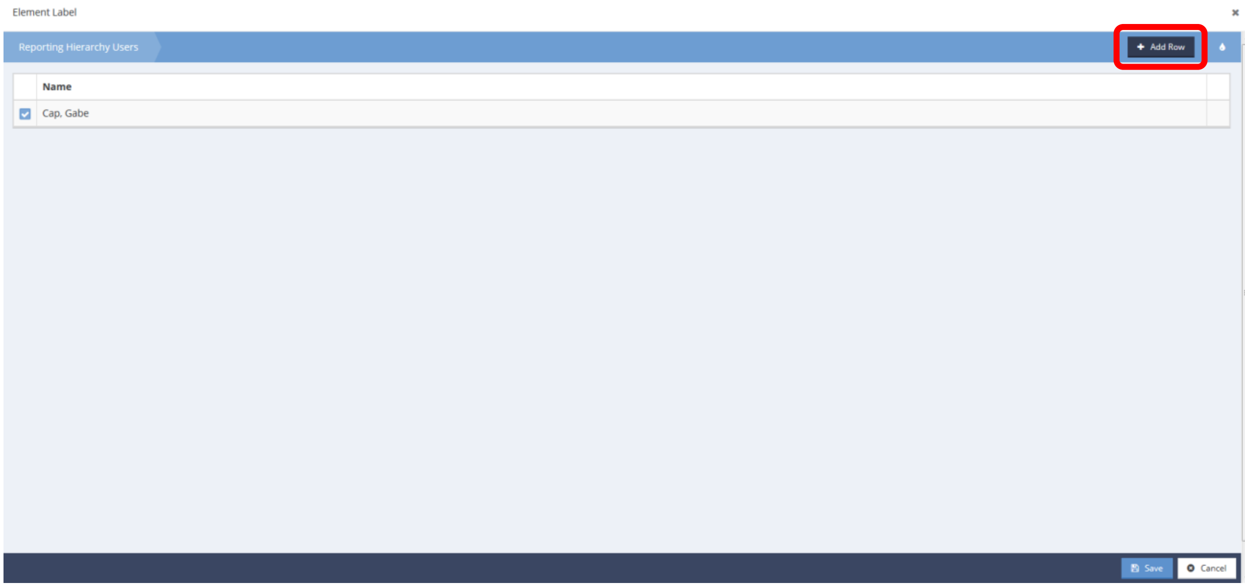


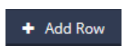
Click the icon for Reporting Hierarchy Level. The Reporting Level Setup form displays.

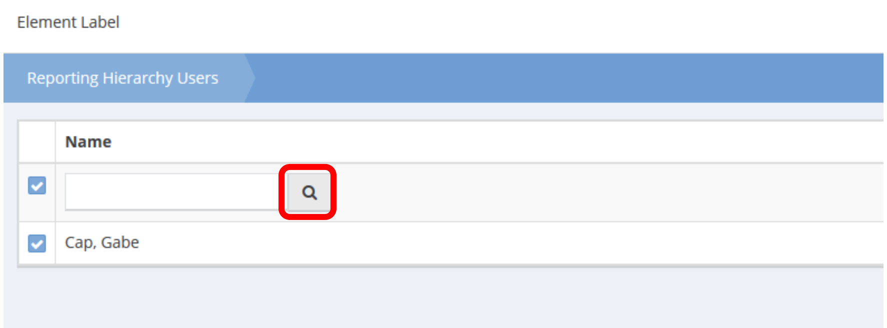


Click the Assign Users button.

The Reporting Hierarchy Users form displays.

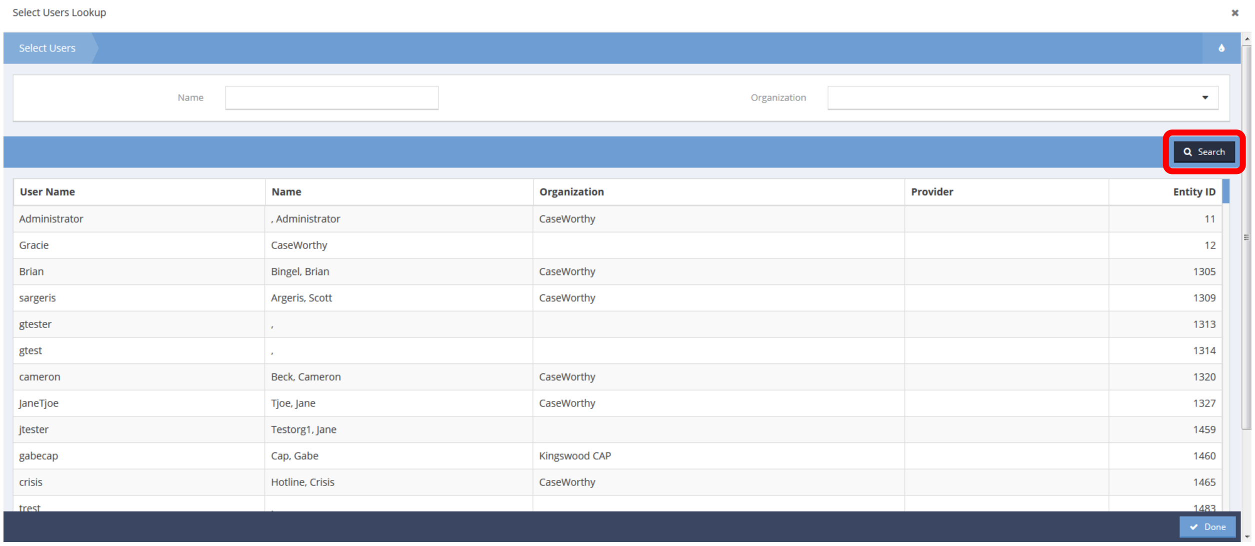


To assign a new user, click the  button. A new row appears.

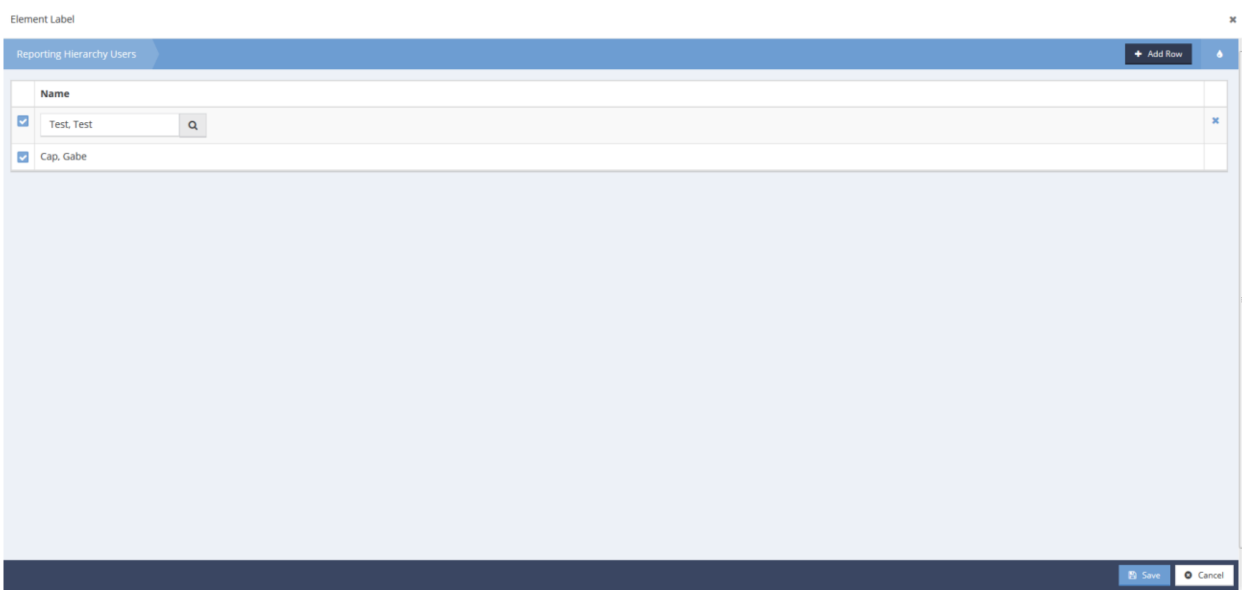


Click the magnifying glass lookup  icon to lookup a user.

The Select Users Lookup form displays.



Enter a name or select an organization in the relevant fields and click the Search button. Locate and click the desired user in the search results. The selected user appears in the field.

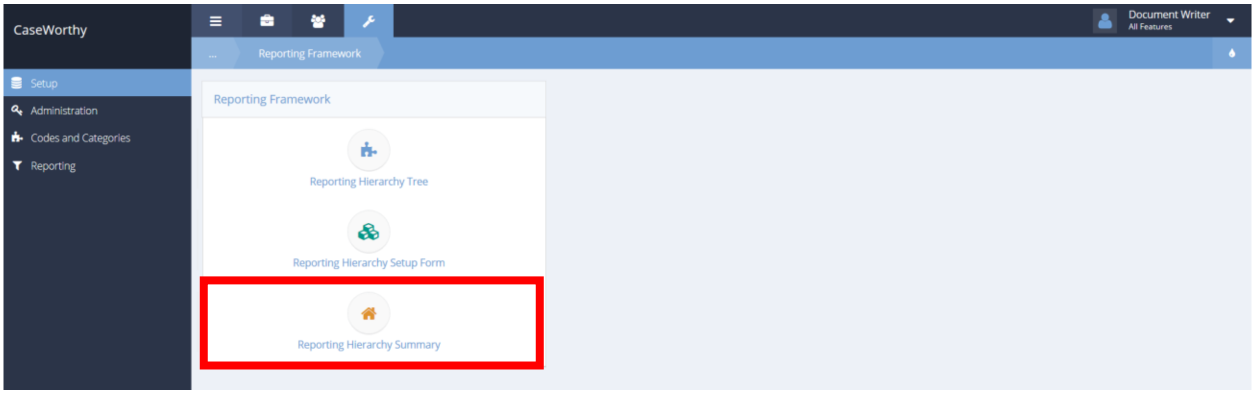


Click the Save button when finished.

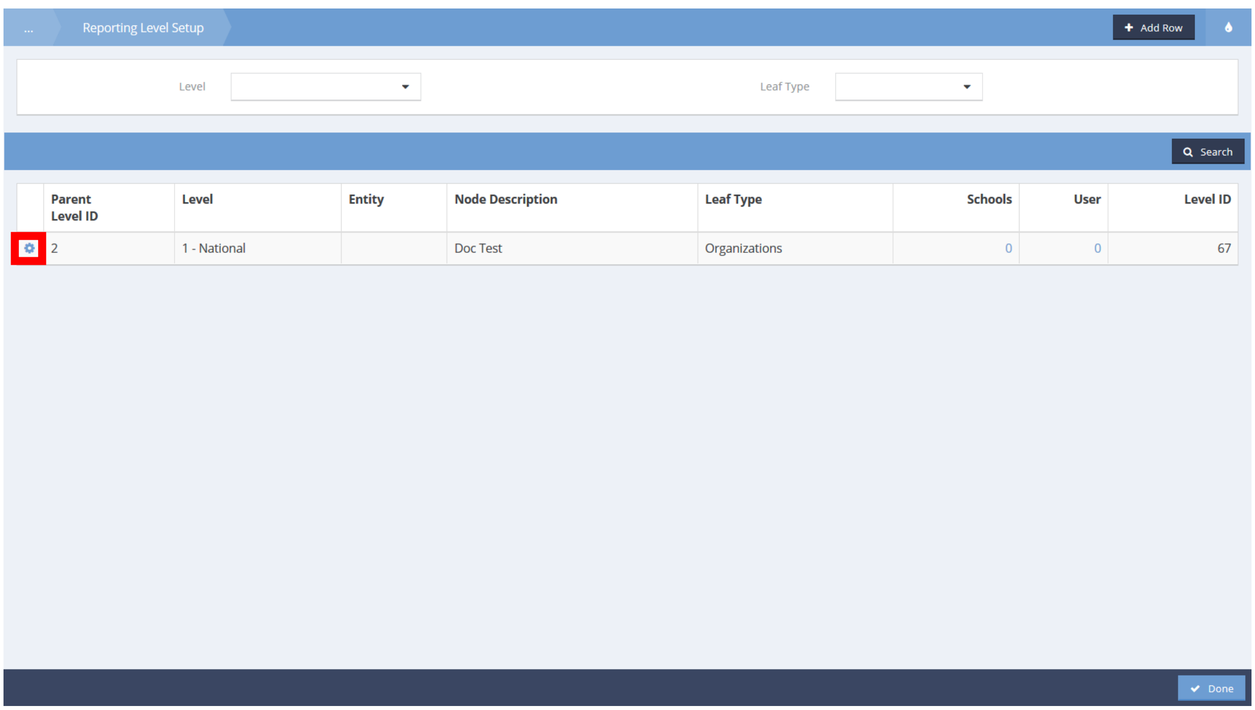
Reporting Framework

Objective: Create and edit a reporting hierarchy.

Navigation: Administration>Setup>Reporting Framework

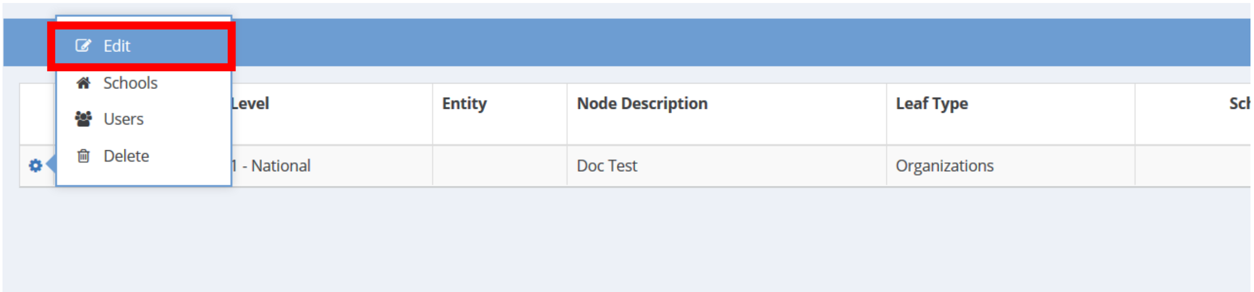


Select Reporting Hierarchy Summary from the Reporting Framework dashboard. The Reporting Level Setup form displays.

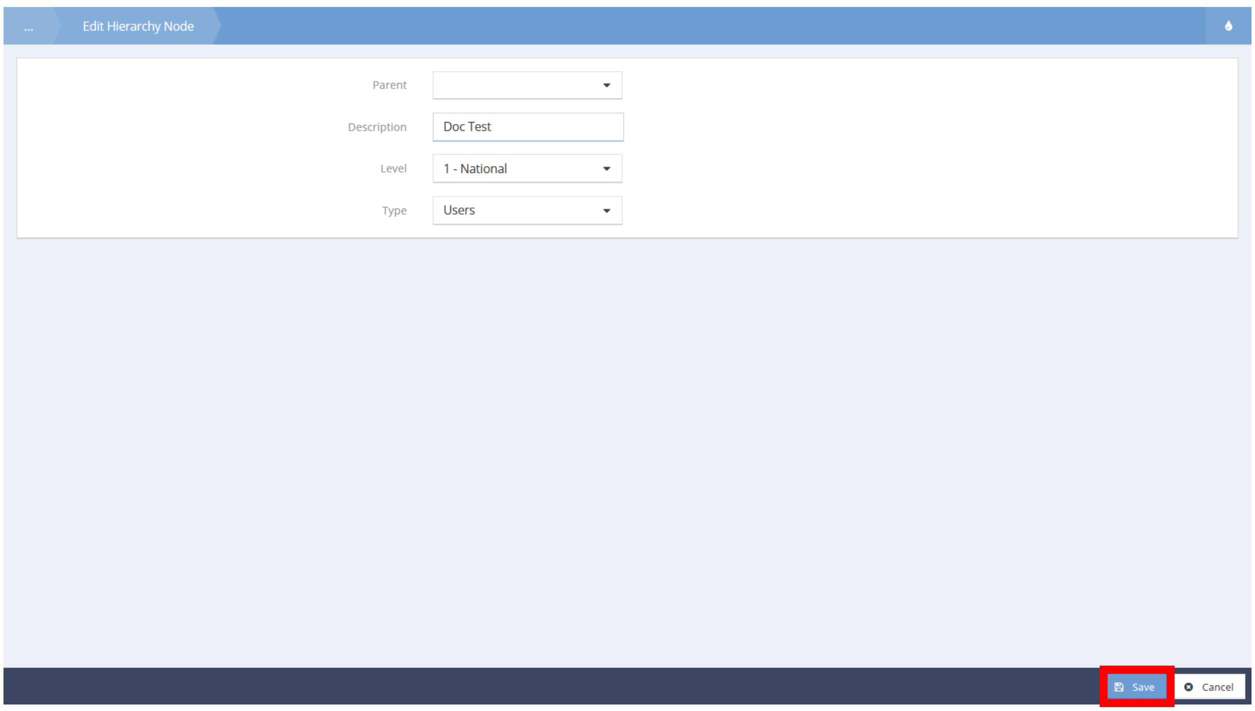


Click the action gear icon associated with the desired entry.

Select Edit from the menu options.



The Edit Hierarchy Node form displays.

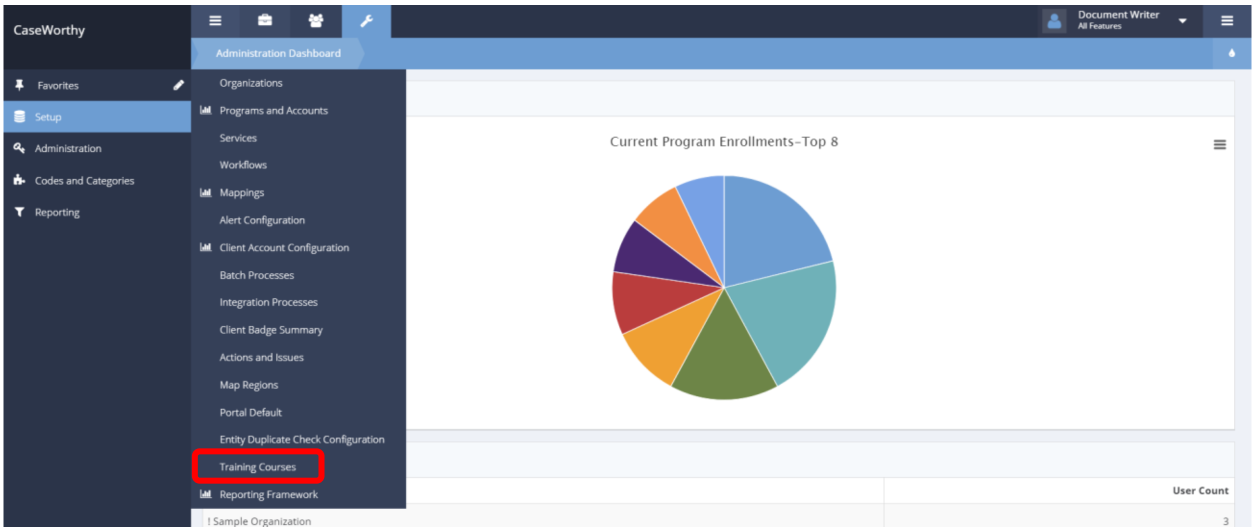


Edit any desired field, click the Save button to save and exit.

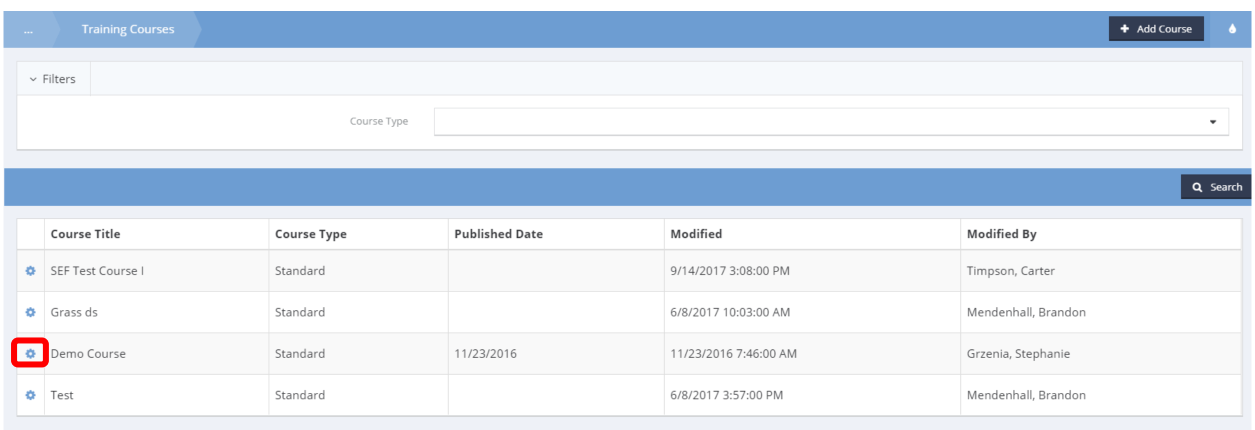
Edit Scoring

Objective: Provide a way to score training quizzes given to clients.

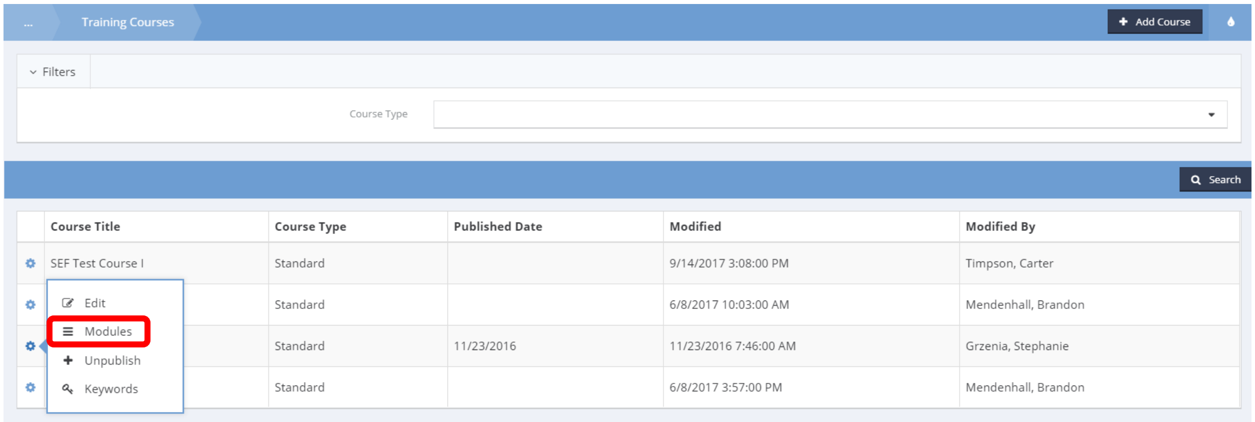
Navigation: Administration Dashboard>Setup>Training Courses>...Edit Scoring



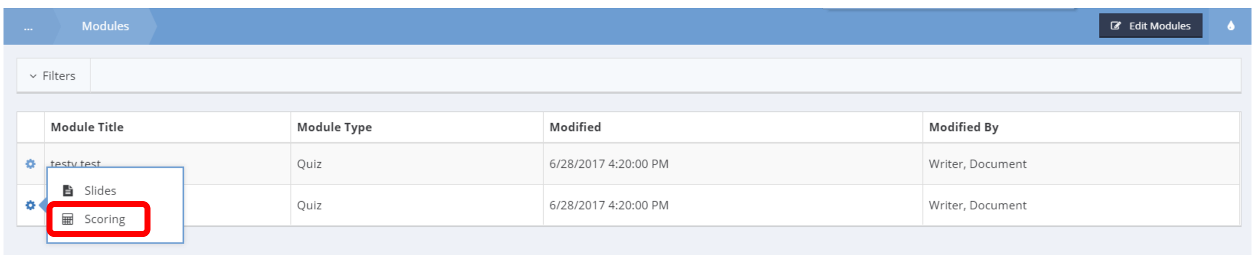
Select Training Courses from the Setup Menu under the Administration tab. The Training Courses form displays. Click the action gear icon next to the desired course title.



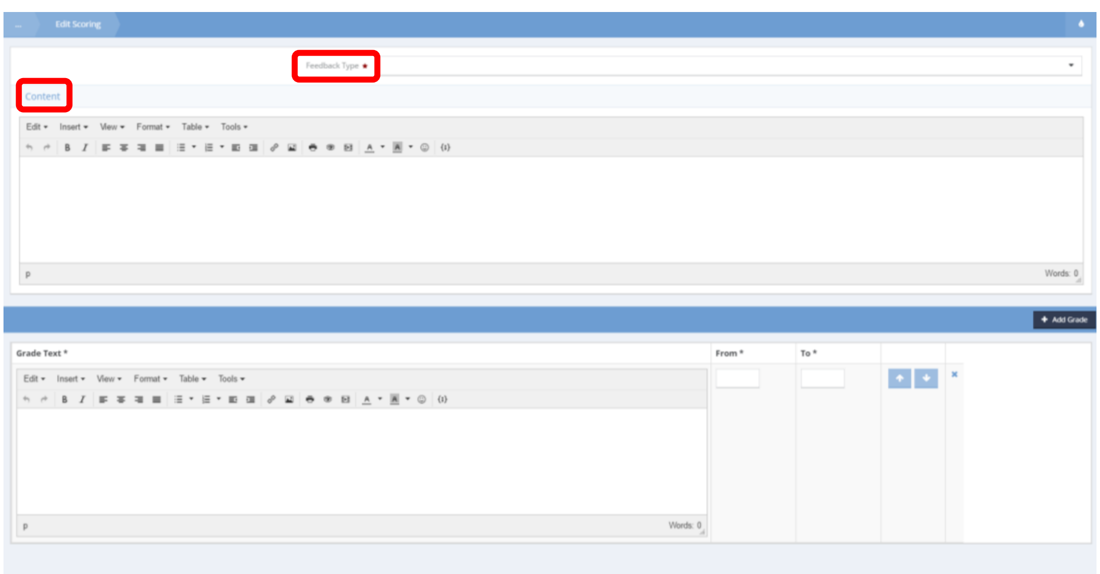
A pop-up menu appears.



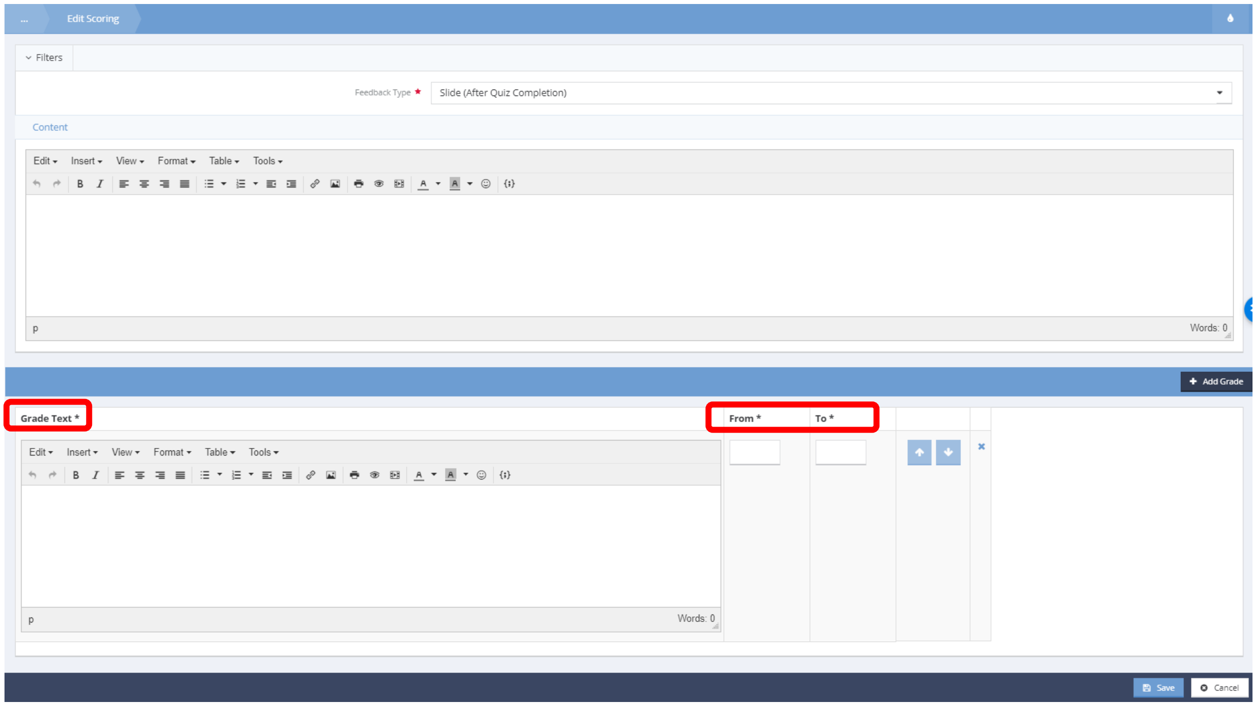
Select Modules from the pop-up menu. The Modules form appears.



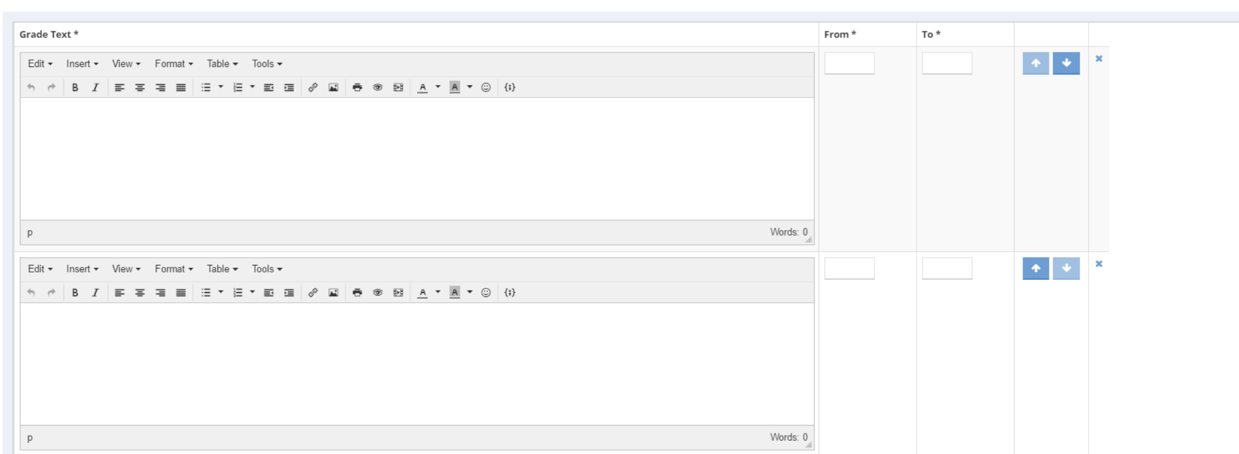
Click the action gear icon next to a module type that is in 'Quiz' format. Select Scoring from the pop-up menu The Edit Scoring form appears.



To select a Feedback type, click the drop-down arrow in the Feedback Type Menu. Enter any desired feedback in the textbox labeled Content.



To add a grade, enter text into the textbox labeled Grade Text. Enter any specific parameter values for the grade in the From and To boxes. To add more grade parameters, click the Add Grade button. A new textbox appears.



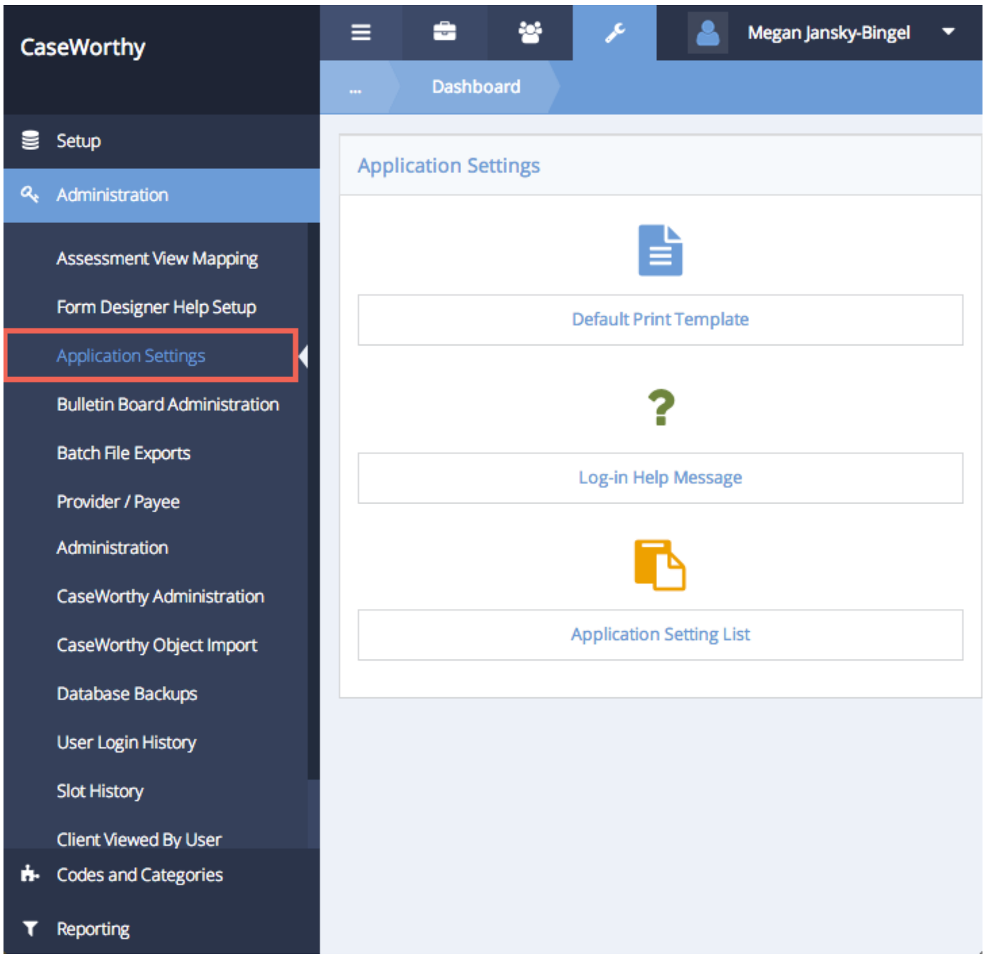
Click the icon to delete the grade that the icon is associated with. Click the icons to reorganize the grade text. Click the Save button to save the form and return to the Modules page.

Administration Menu

Application Settings

(Administration>Administration>Application Settings)

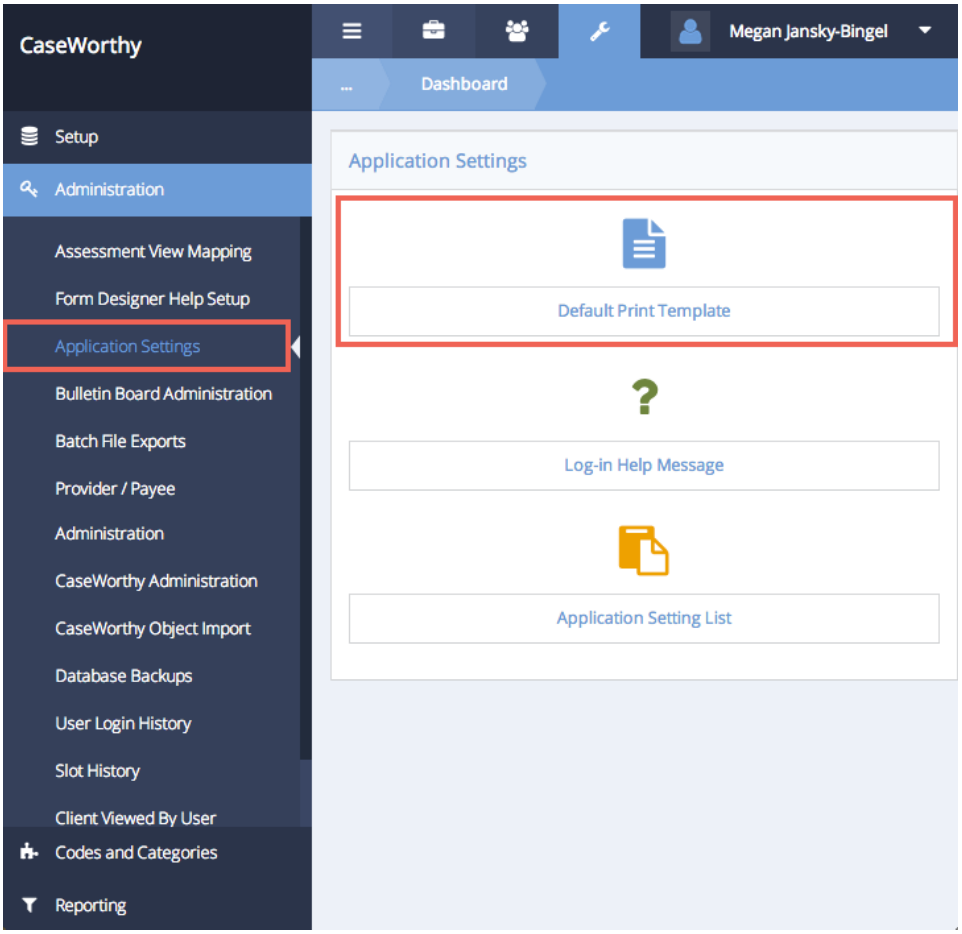
This link leads to a dashboard with options for customizing various application settings such as the default template to use when printing a case note and the "help" message that is displayed on the login page.



Default Print Template

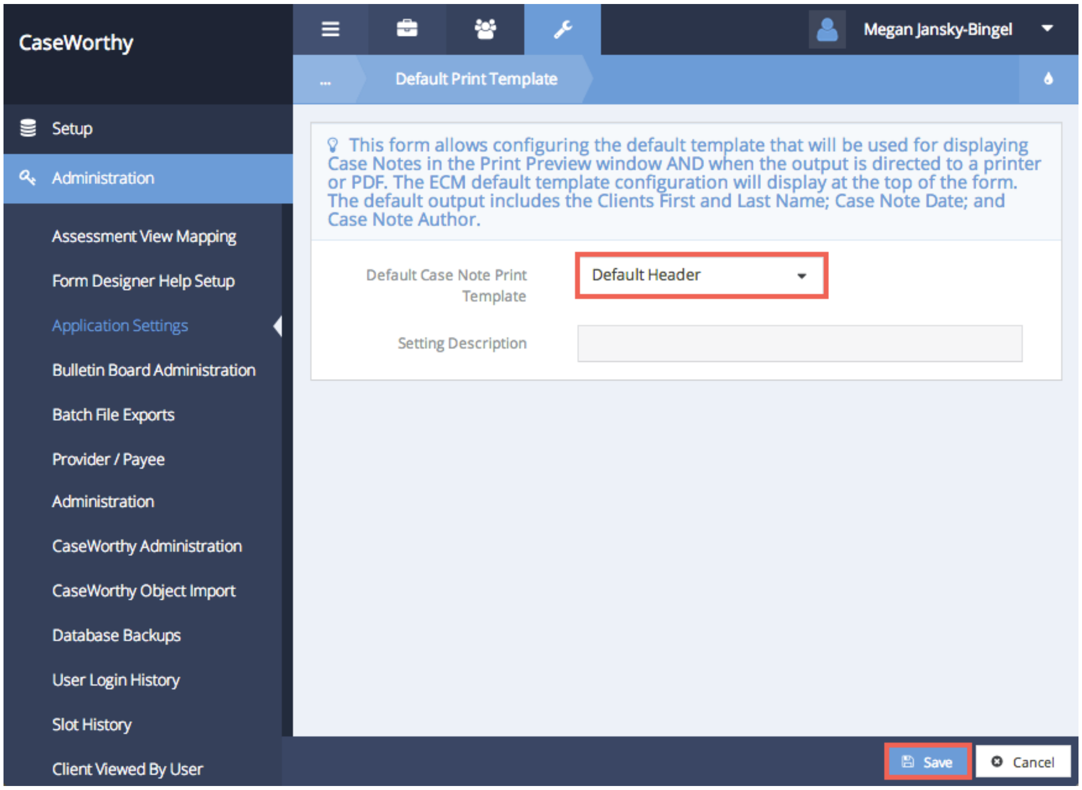
(Administration>Administration>Application Settings>Default Print Template)

From the Application Settings dashboard, click on the "Default Print Template" icon.



The Default Print Template form displays. Use the drop-down list to select the desired case note template that has been created in the system to use as a template for the header when printing case notes. For more information on entering case note templates into the system, see the Codes and Categories section of this manual. When the desired template has been selected click the 

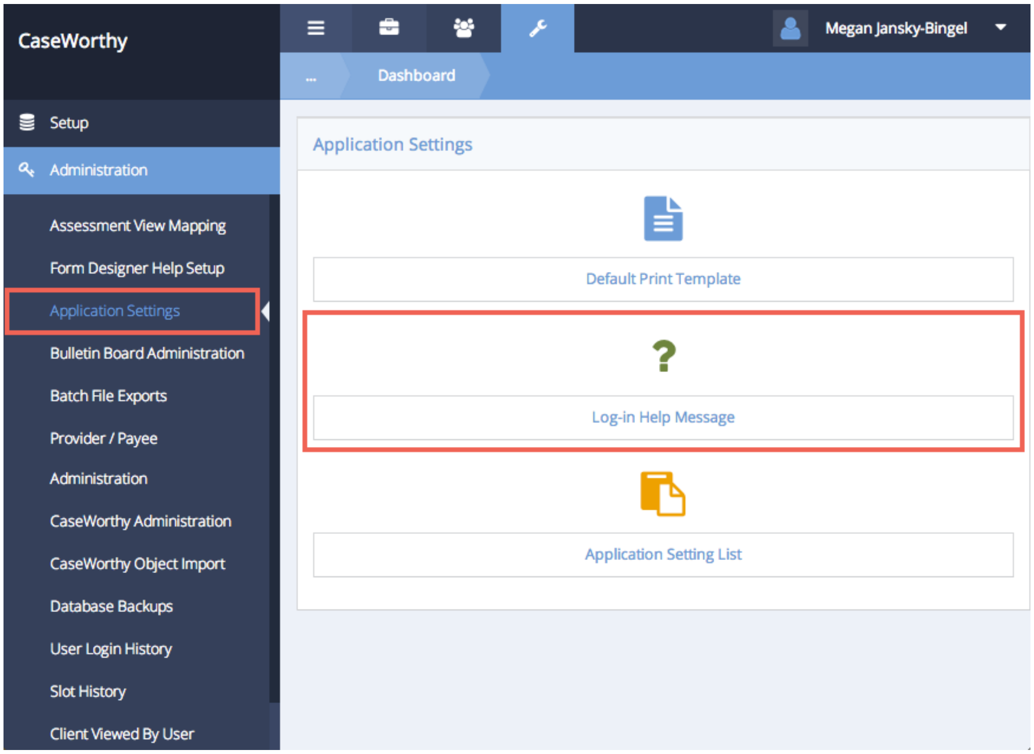
button.



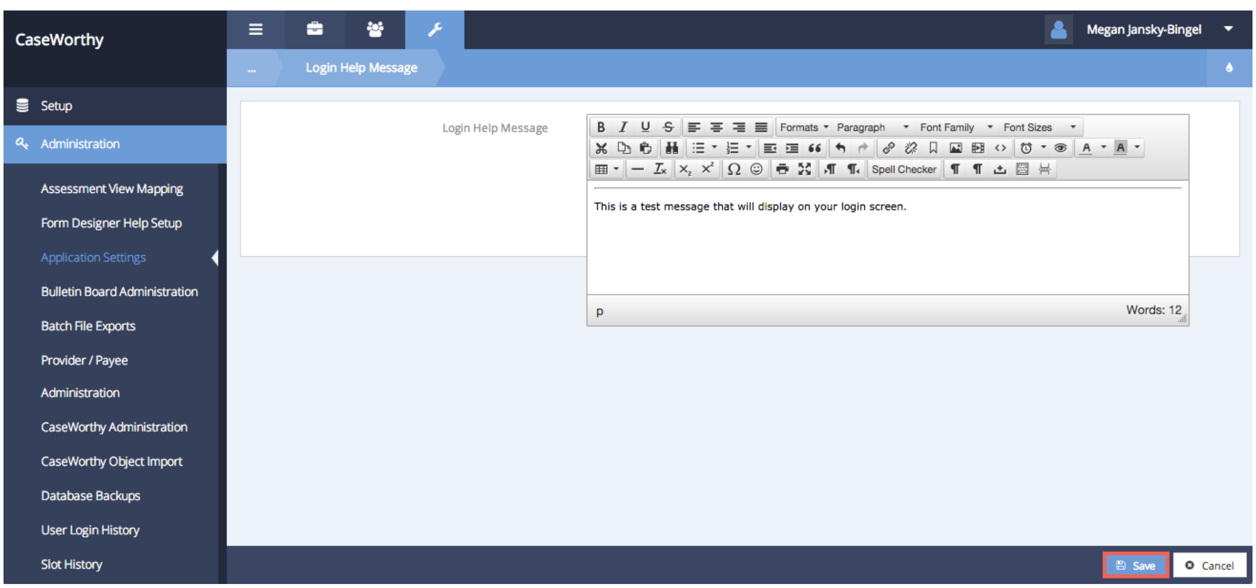
Log-In Help Message

(Administration>Administration>Application Settings>Log-in Help Message)

This feature allows system administrators to enter the “Help” text a user sees when the “Help” button is selected on the login page. Thereby the message can be configured to direct the user to an email, phone number, or other processes the system administrator has designed to assist them with login issues. To customize this message, click on the “Log-in Help Message” icon.



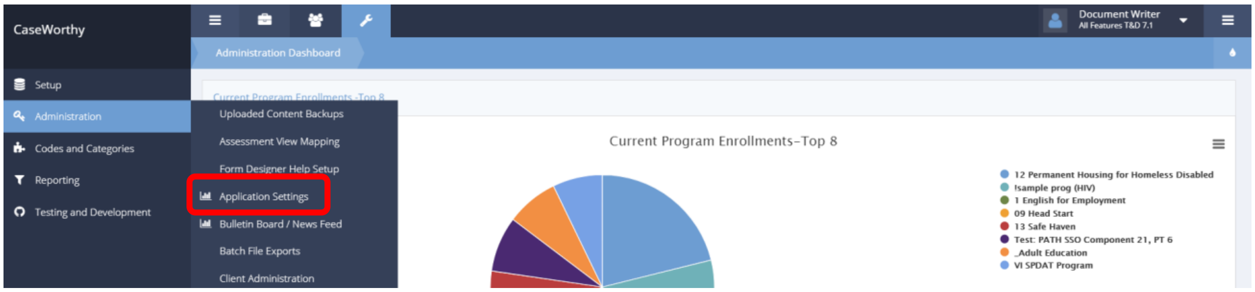
The Login Help Message form displays. Simply type the desired text into the text box and click Save when finished.



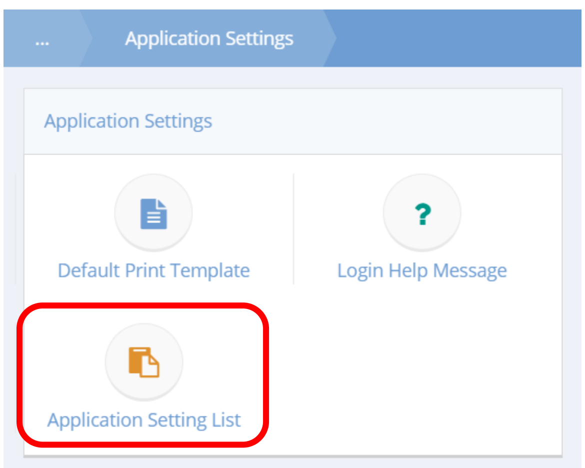
New Application Settings

The following new application settings can be configured by following the navigation below.

Navigation: Administration>Administration>Application Settings>Application Setting List



Under the Administration tab, select Administration. A pop-up menu appears. Select Application Settings. The Application Settings dashboard appears.



Click on the icon labeled Application Setting List.

The Application Setup List appears.

Application Setup List

Description	Value	Setting ID
DisplayFamilyName	false	27
DisplayClientID	true	28
ProgramExit	By ClientID	29
ResumeMakerWSUrl		30
RequiredFieldColor	Crimson	31
ResumeMakerWebUrl		33
SSNRestriction	false	35
HideExtraVetFields	false	36
WFAssessmentStep_GroupByClient	true	37
ProgramWaitList_Processor	false	38
ViewHistoryTracking	false	39
AllowDuplicateEnrollmentWithinDatabase	False	40

Scroll to find the following new application settings.

SSNRestriction

The value defaults to false. To prevent users from entering duplicate social security numbers in their database change the value to true.

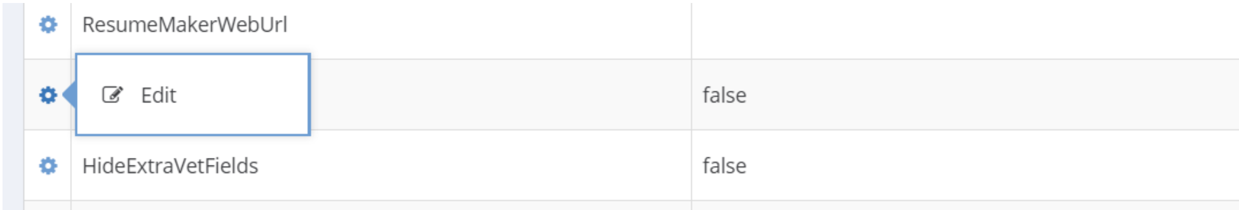
AllowDuplicateEnrollmentWithinDatabase

The value defaults to false. To allow users to enter duplicate enrollments in their database set the value to true.

HideExtraVetFields

See the HMIS 7.2 documentation.

To change the value of an application setting, follow the instructions below.



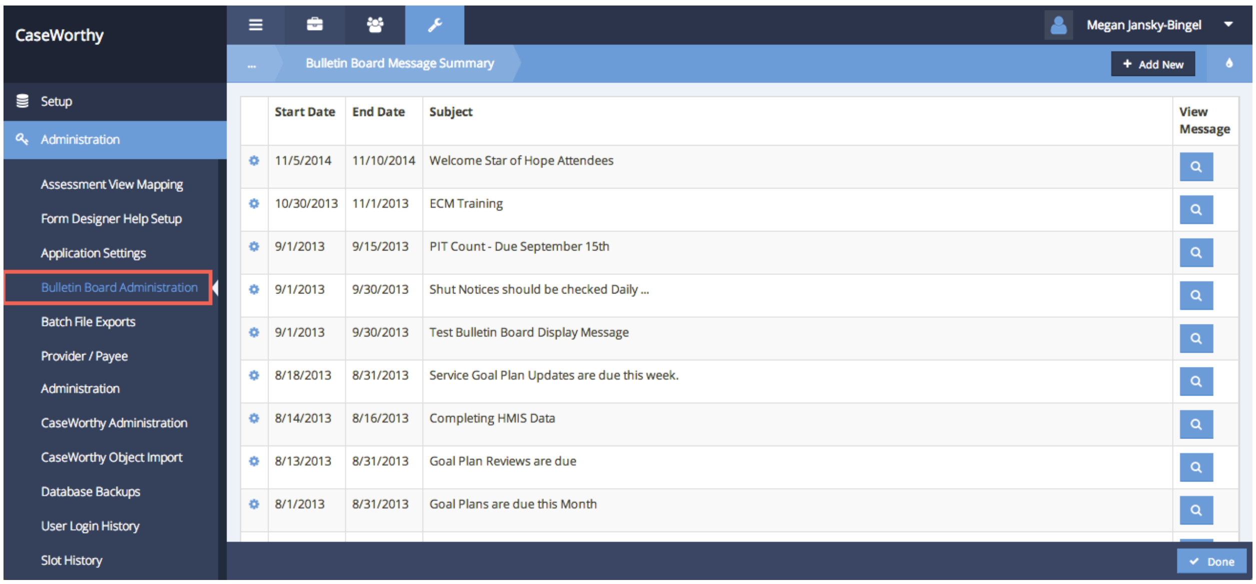
Click on the action gear icon. Select Edit on the popup menu that appears.

Delete the word 'false' in the Value textbox and type the word 'true'.

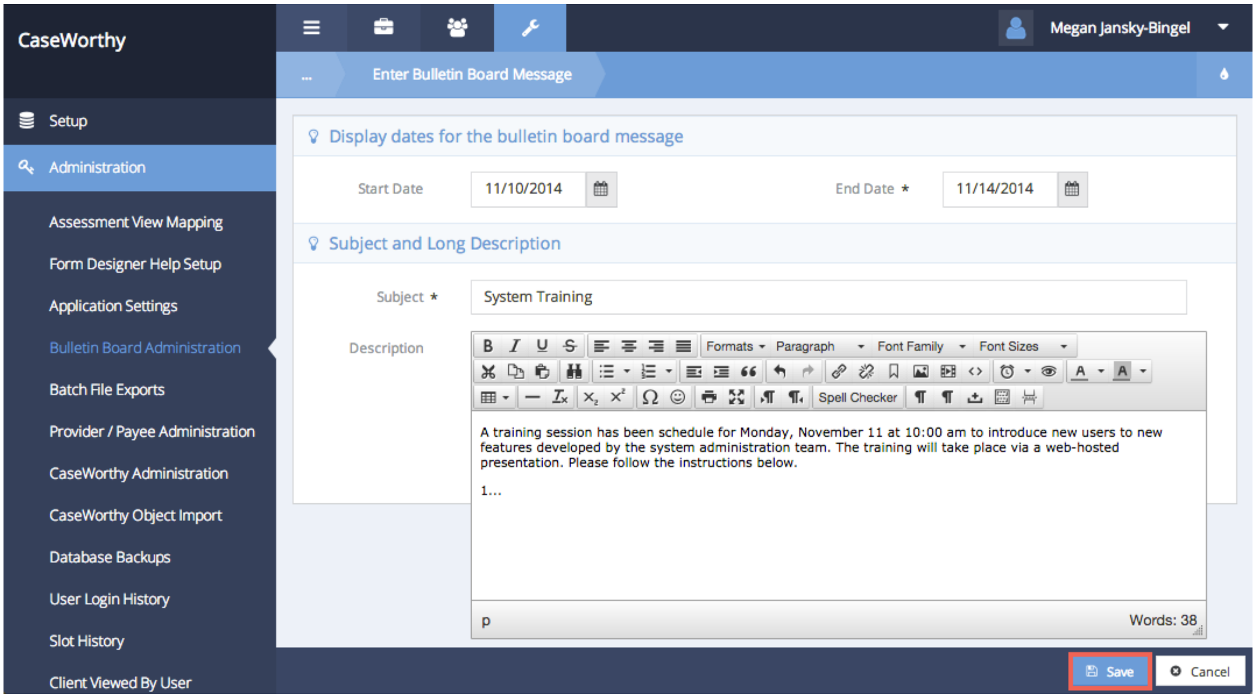
Bulletin Board Administration

(Administration>Administration>Bulletin Board Administration)

The bulletin board functionality allows users granted access to create messages and configure who the message is broadcast to. Messages are set up to display on the “Default” dashboard”, but can be customized to display on other dashboards as well or instead. To create a bulletin board message, click on the Bulletin Board Administration link. The Bulletin Board Message summary form displays. To add a new message, click the + Add New button.



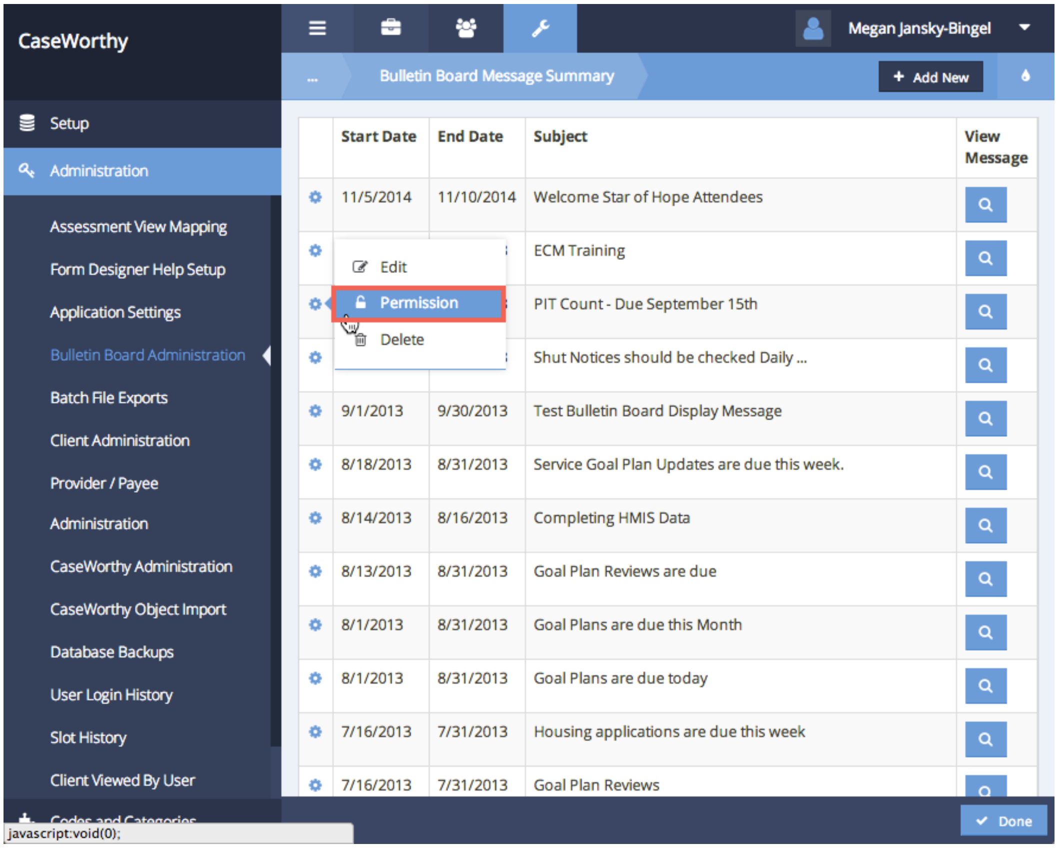
Enter a Start Date – this is the date the message displays first on the designated dashboard. Enter an End Date – as of this date, the message no longer displays. Give the message a subject title, then type the desired message into the Description text box. When all desired text has been entered click the Save button.



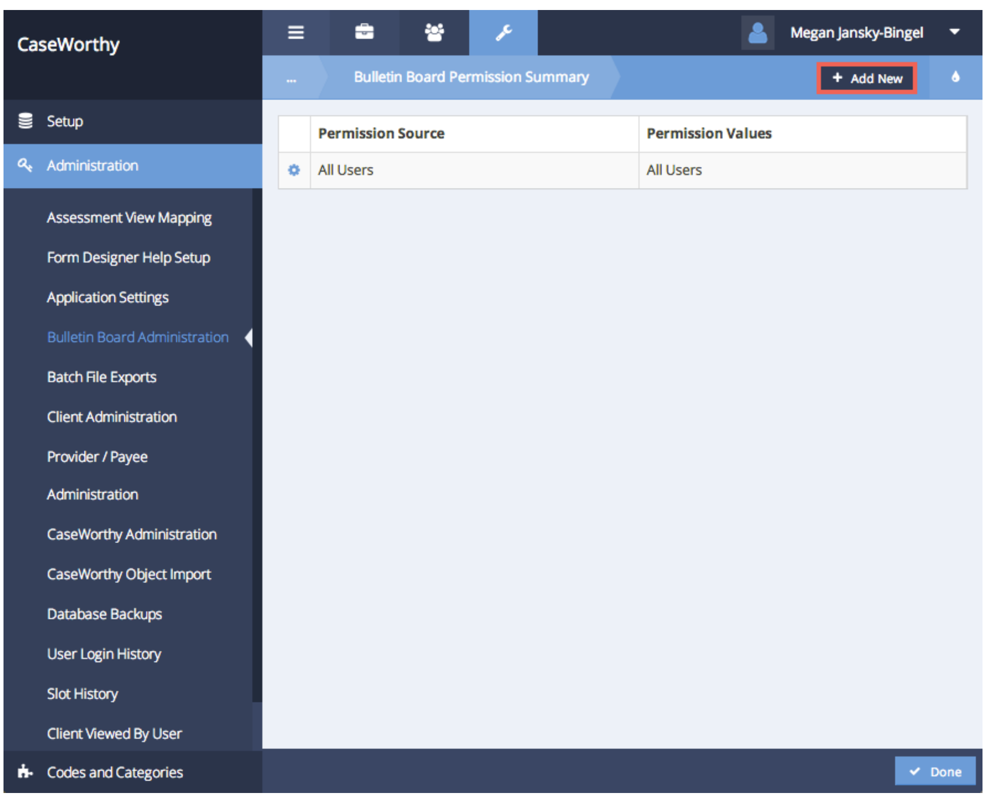
Bulletin Board Permissions

(Administration>Administration>Bulletin Board Administration>Bulletin Board Permissions)

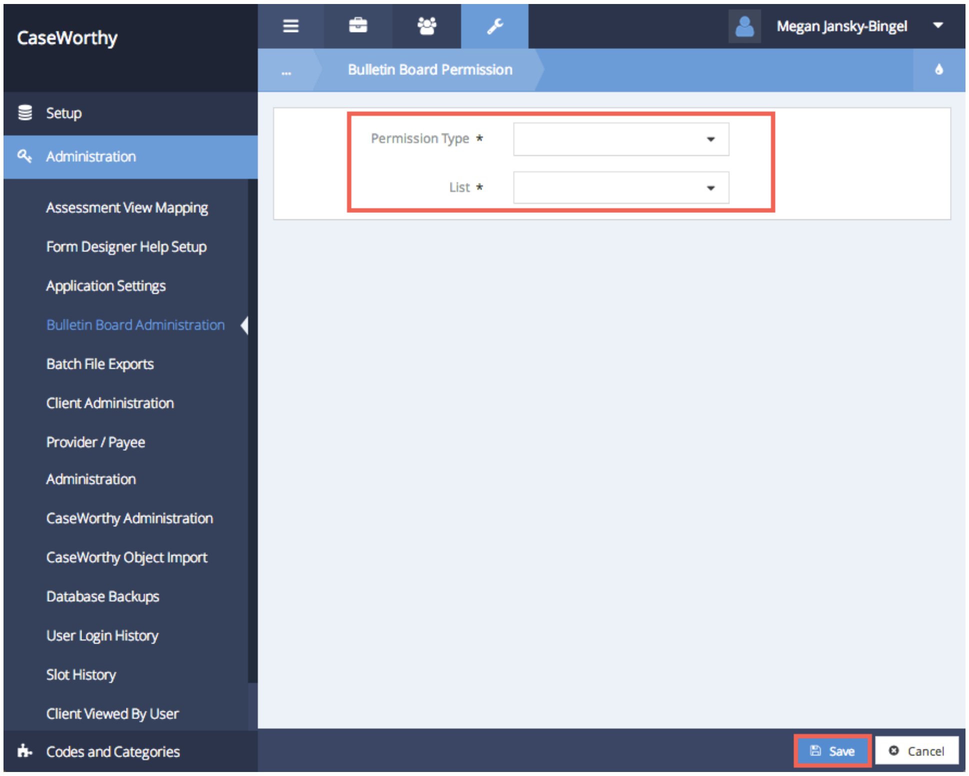
To configure who the message is broadcast to, click on the action gear next to the message and select "Permission".



The bulletin Board Permission summary form displays. Click on the + Add New button.



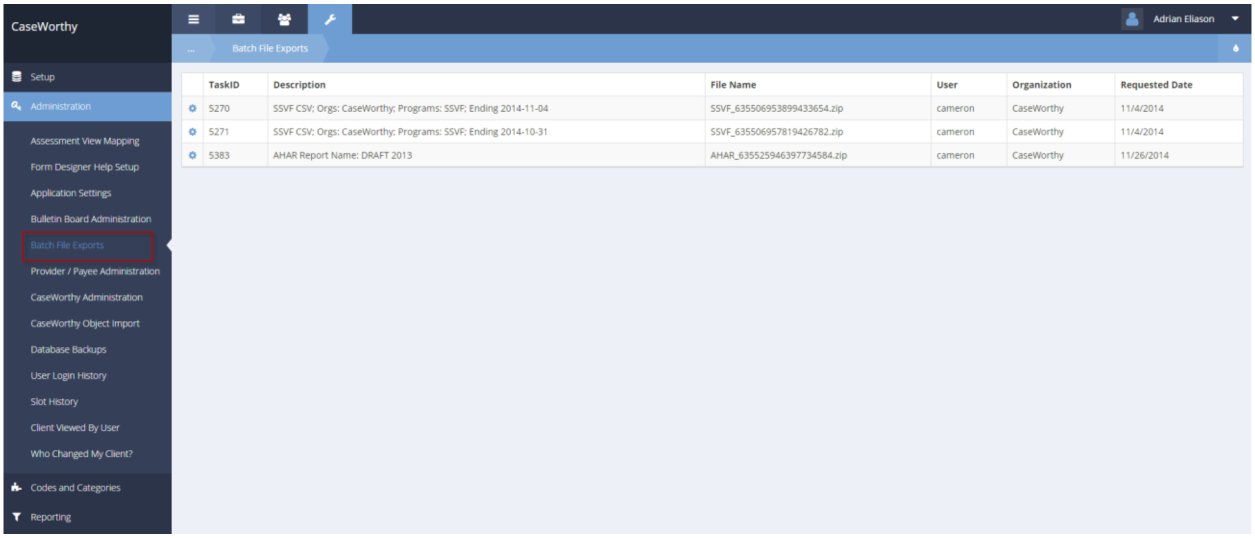
On the Bulletin Board Permission form, use the drop down lists to identify the type of permission (such as case managers assigned to a program, organizations, providers, provider categories, etc.), then select Save. To add additional permission types or entries from a type list, click + Add New from the summary form and repeat the steps above.



Batch File Exports

(Administration>Administration>Batch File Exports)

This link leads to a summary form that displays XML reports that have been sent via the system. The files are stored as zip files and are typically copies of SSVF and/or AHAR reports.

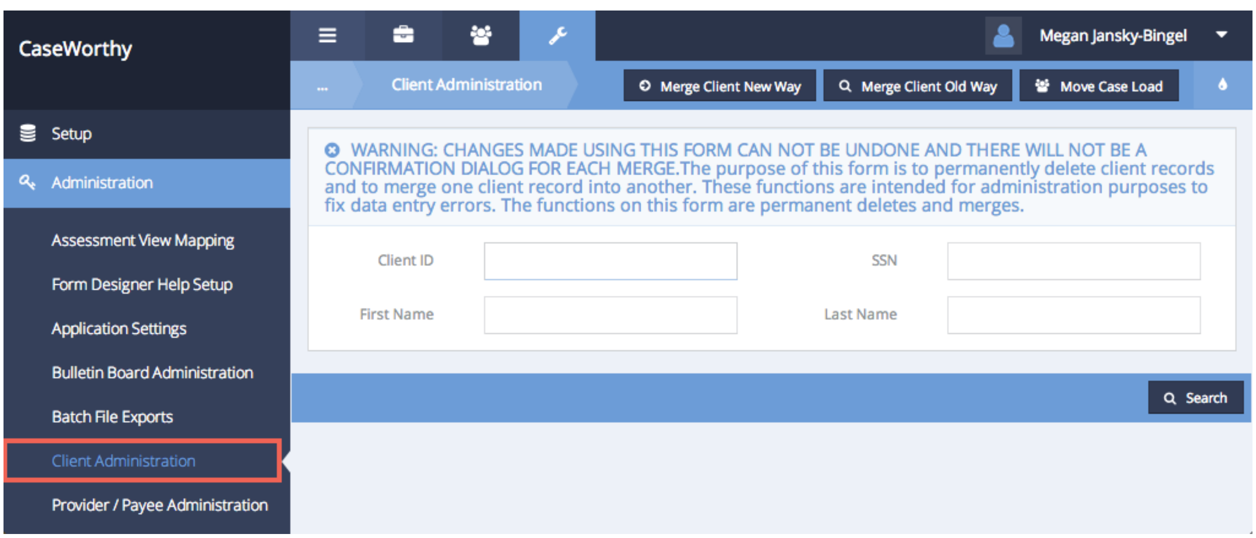


Client Administration

(Administration>Administration>Client Administration)

THESE ACTIONS CANNOT BE REVERSED. DELETING, MERGING OR MOVING THE SELECTED RECORDS IS A PERMANENT ACTION.

The Client Administration area allows system administrators to permanently delete client records, merge duplicated client records and transfer caseloads.



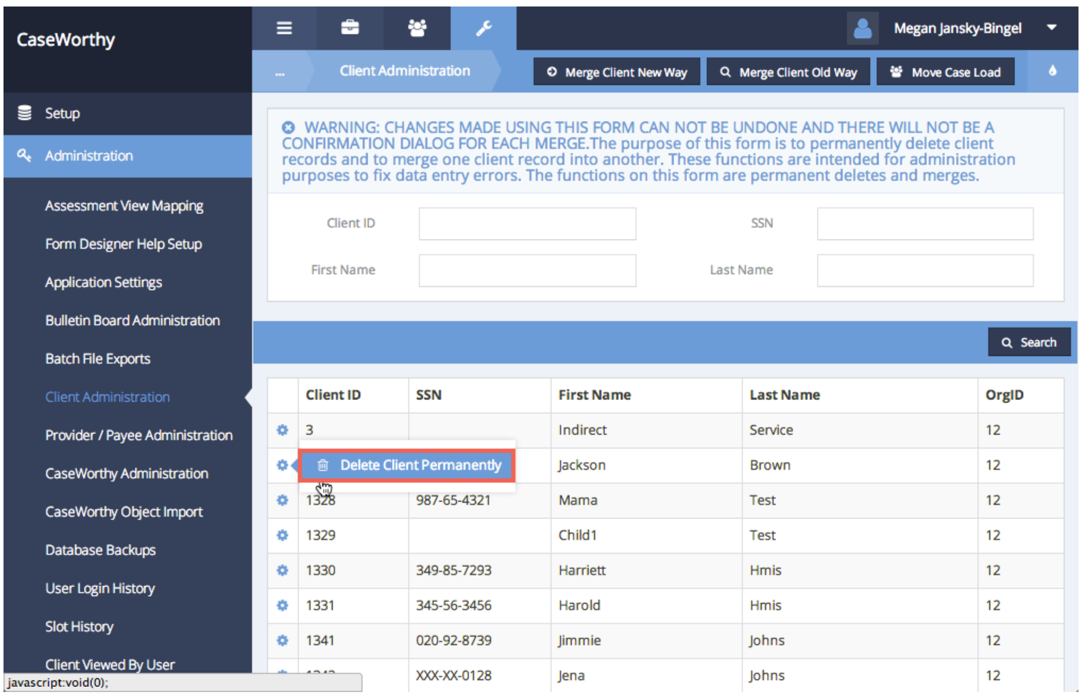
Permanent Delete

(Administration>Administration>Client Administration>Permanent Delete)

THIS ACTION CANNOT BE REVERSED. DELETING THE SELECTED RECORD IS A PERMANENT ACTION.

To permanently delete a client record, enter the Client ID, SSN, First Name and/or Last name and click the Search button. Records matching the entered criteria displays. Click on the action gear next to the record to be deleted and select "Delete Client Permanently".

There is NOT a warning message associated with this button – clicking on the "Delete Client Permanently" option initiates the delete process IMMEDIATELY.

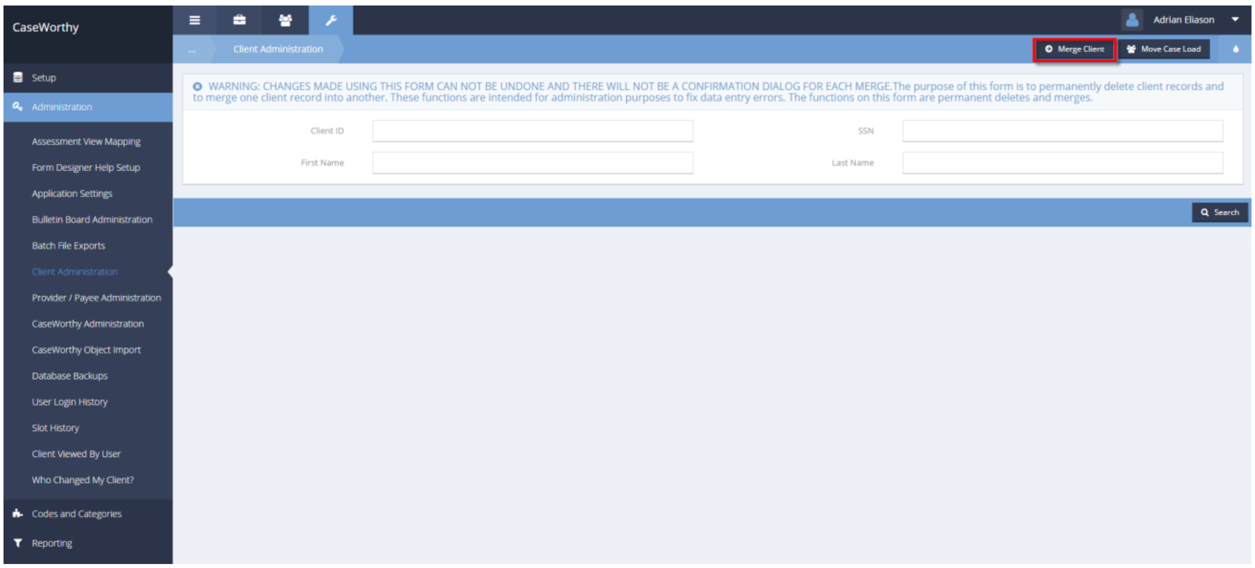


Merge Client Records

(Administration>Administration>Client Administration>Merge Client Records)

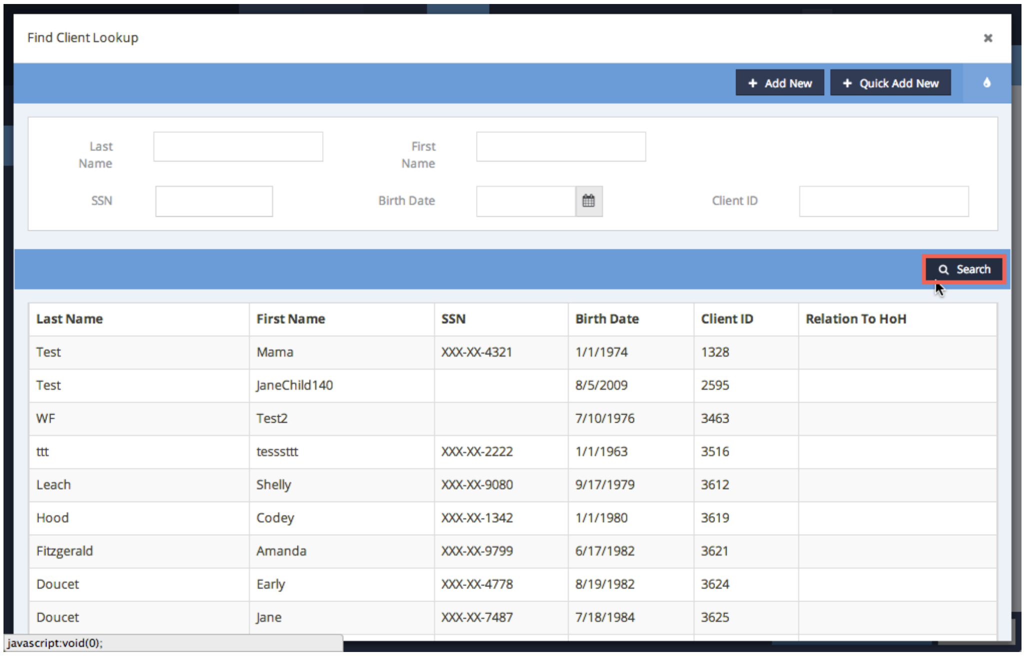
THIS ACTION CANNOT BE REVERSED. MERGING THE SELECTED RECORDS IS A PERMANENT ACTION.

To merge a duplicated client record, from the Client Administration form, click on the Merge Client button.

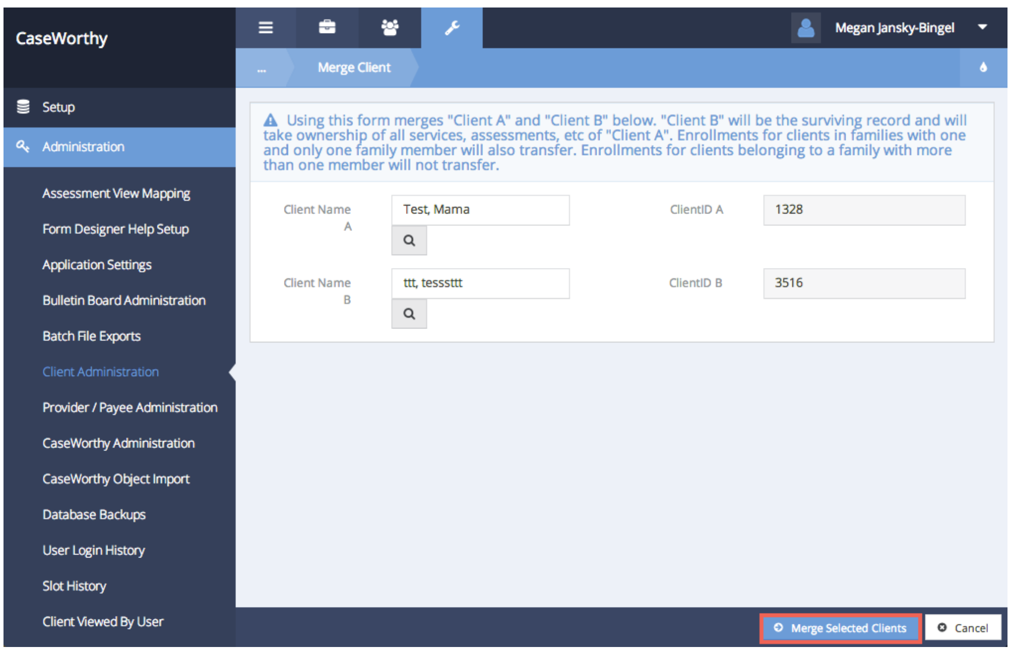


The Merge Client form displays. This form merges "Client A" and "Client B”. "Client B" is the surviving record that then takes ownership of all services, assessments, etc. of the record associated with "Client A". Clients in families with one and only one family member also have enrollments transferred. For clients belonging to a family with more than one member, the enrollments do not move with client merge, and must be updated manually in the Case Management area of the system. To associate records to be merged, click on the look-up icon next to the Client A and Client B fields. Use the search form to find and select the records to be associated with each field. When the desired records have been associated to the appropriate “Client”, click the Merge Selected Clients button.

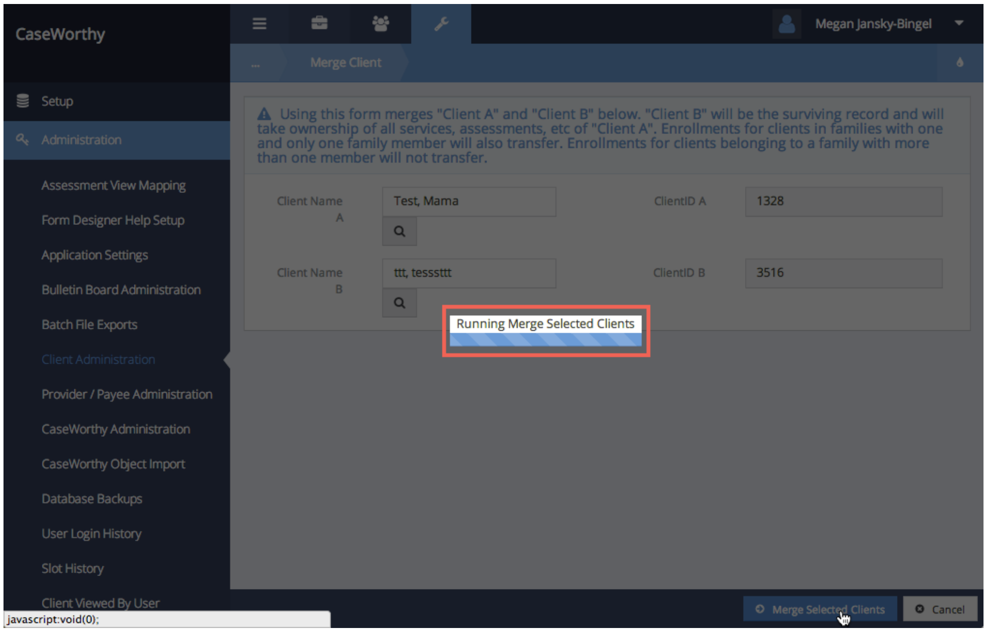
A warning message DOES NOT appear – clicking on the Merge Selected Clients option initiates the merge process IMMEDIATELY.



Find Client Lookup
Add New
Quick Add New
Last Name
First Name
SSN
Birth Date
Client ID
Search
Last Name | First Name | SSN | Birth Date | Client ID | Relation To HoH
Test | Mama | XXX-XX-4321 | 1/1/1974 | 1328
Test | JaneChild140 | 8/5/2009 | 2595
WF | Test2 | 7/10/1976 | 3463
ttt | tesssttt | XXX-XX-2222 | 1/1/1963 | 3516
Leach | Shelly | XXX-XX-9080 | 9/17/1979 | 3612
Hood | Codey | XXX-XX-1342 | 1/1/1980 | 3619
Fitzgerald | Amanda | XXX-XX-9799 | 6/17/1982 | 3621
Doucet | Early | XXX-XX-4778 | 8/19/1982 | 3624
Doucet | Jane | XXX-XX-7487 | 7/18/1984 | 3625
javascript:void(0);



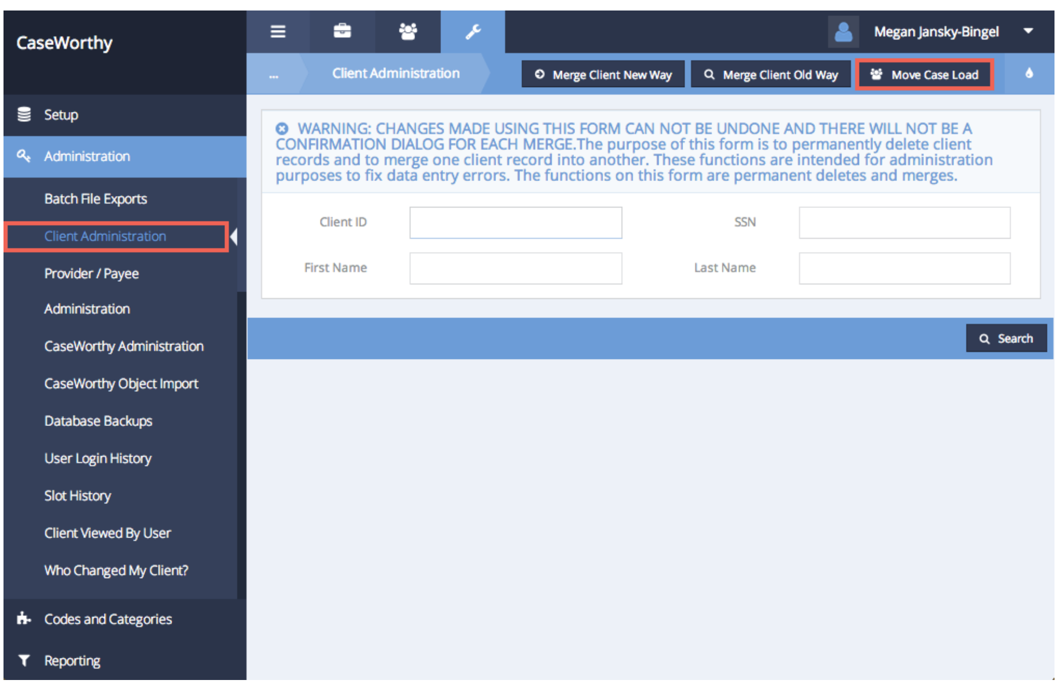
CaseWorthy
Megan Jansky-Bingel
Merge Client
Setup
Administration
Assessment View Mapping
Form Designer Help Setup
Application Settings
Bulletin Board Administration
Batch File Exports
Client Administration
Provider / Payee Administration
CaseWorthy Administration
CaseWorthy Object Import
Database Backups
User Login History
Slot History
Client Viewed By User
Using this form merges "Client A" and "Client B" below. "Client B" will be the surviving record and will take ownership of all services, assessments, etc of "Client A". Enrollments for clients in families with one and only one family member will also transfer. Enrollments for clients belonging to a family with more than one member will not transfer.
Client Name A
Test, Mama
ClientID A
1328
Client Name B
ttt, tesssttt
ClientID B
3516
Merge Selected Clients
Cancel



Move Case Load

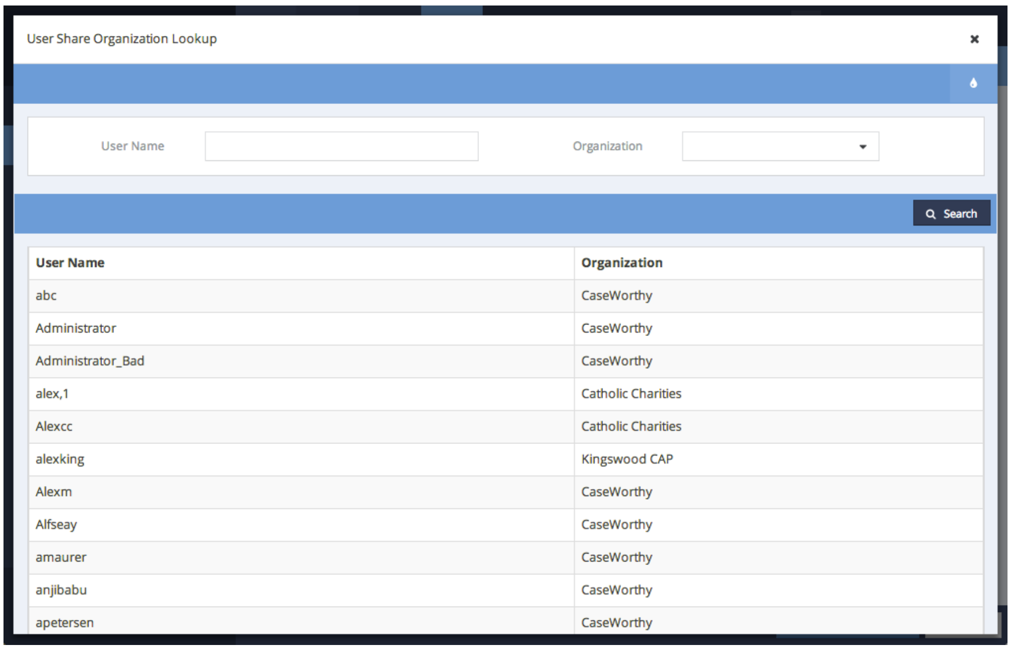
(Administration>Administration Menu>Client Administration>Move Case Load)

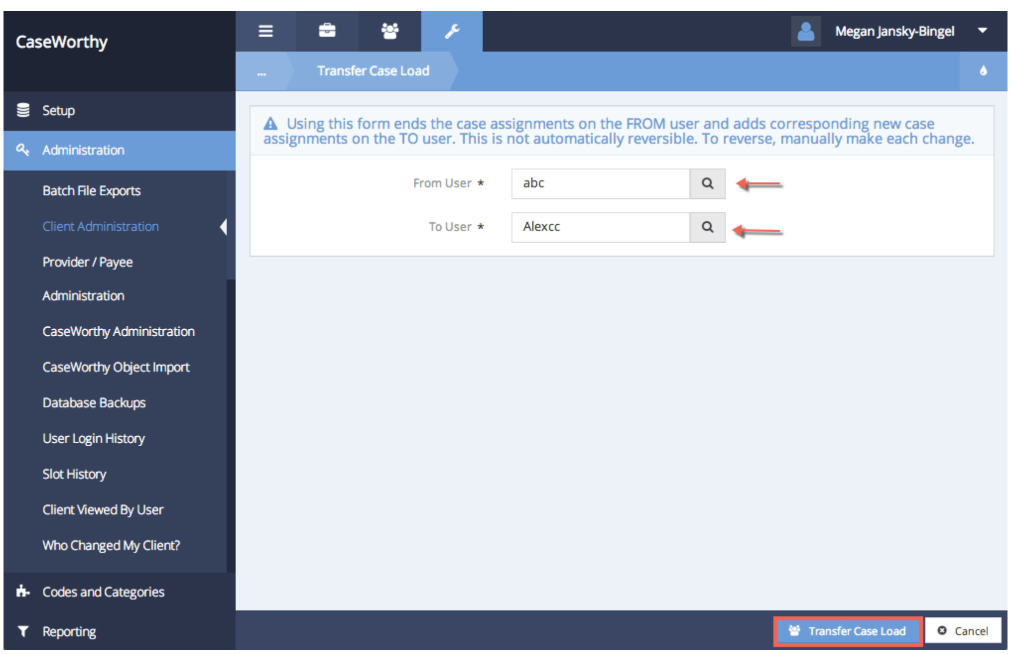
To move all clients associated with a specific case manager to another case manager, select the Move Case Load button on the Client Administration form.



To move ALL clients associated with a case manager to a single other case manager, click on the look-up icon on the From User field to find and select the case manager currently associated with the clients. Next, click on the look-up icon on the To User field to find and select the case manager to become associated with the clients. When the From User and To User fields are associated with the desired case managers, click the Transfer Case Load button.

A warning message DOES NOT appear – clicking on the Transfer Case Load button initiates the transfer process IMMEDIATELY. **THIS ACTION CANNOT BE AUTOMATICALLY REVERSED. To reverse this action each record must be changed manually in the Case Management area of the system. TANSFERING THE CASE MANAGER ASSIGNMETS IS A PERMANENT ACTION.**

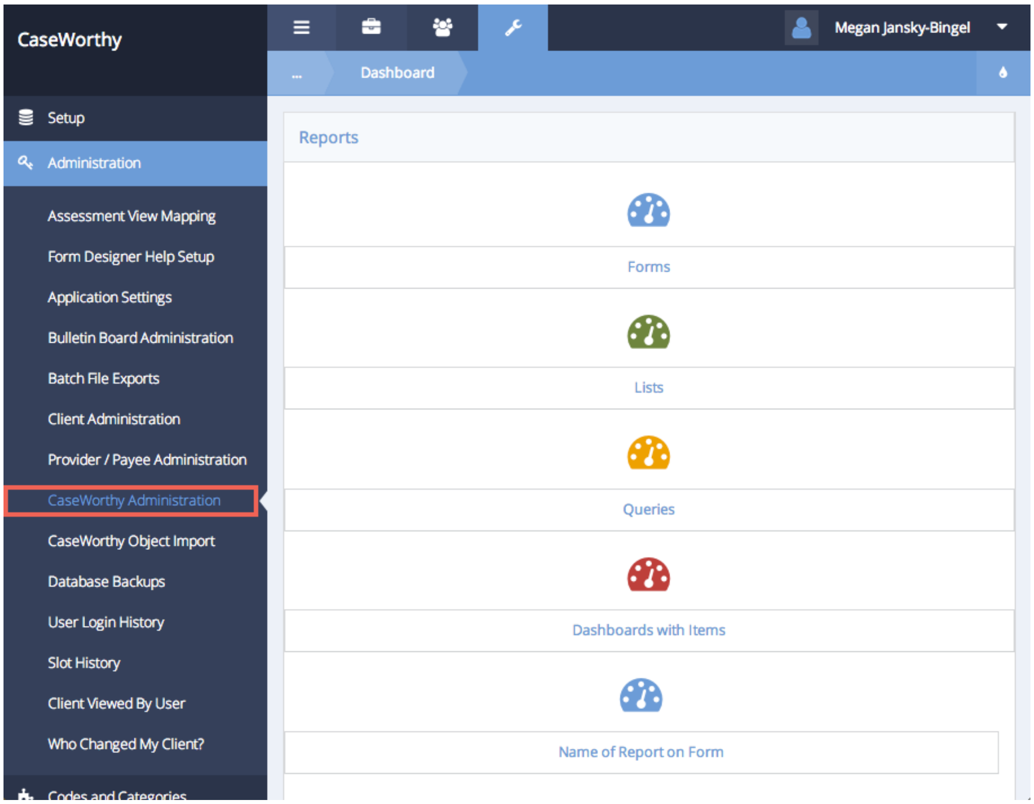




CaseWorthy™ Administration

(Administration>Administration Menu>CaseWorthy Administration)

The CaseWorthy™ Administration area allows system administrators to view used and “abandoned” forms, lists, queries and dashboards. These summary forms make finding and managing forms simpler and more efficient.

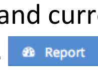


Reports

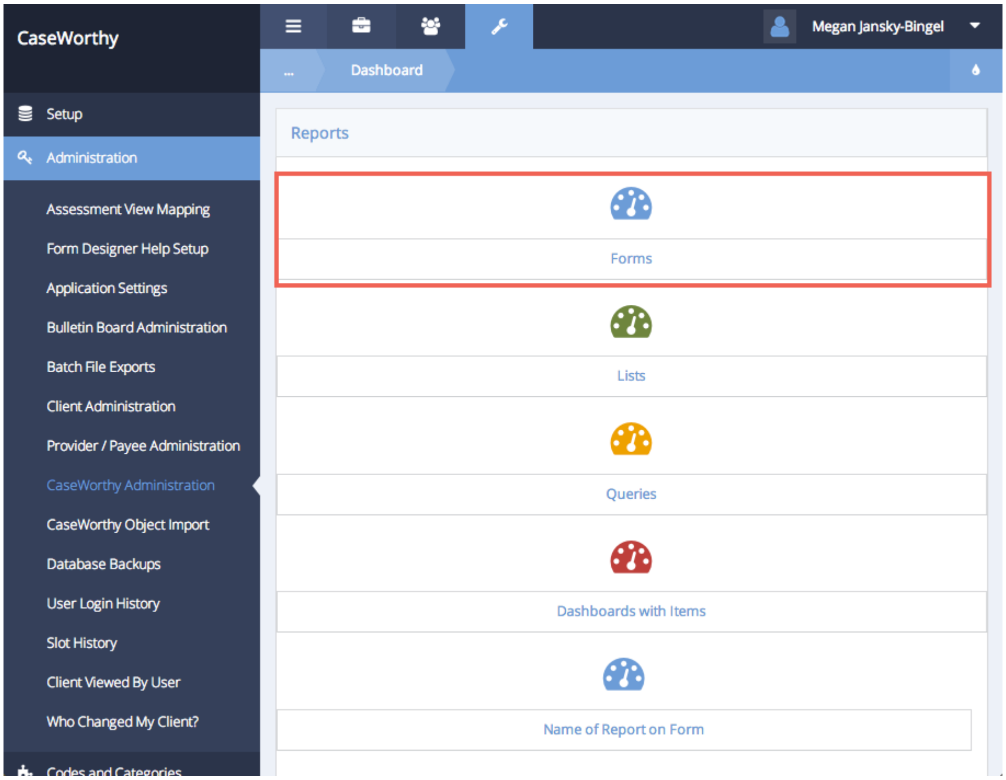
(Administration>Administration Menu>CaseWorthy™ Administration>Reports)

The “Reports” area of the CaseWorthy™ Administration dashboard contains a variety of summary forms that allow the system administrator to find forms, lists, etc.

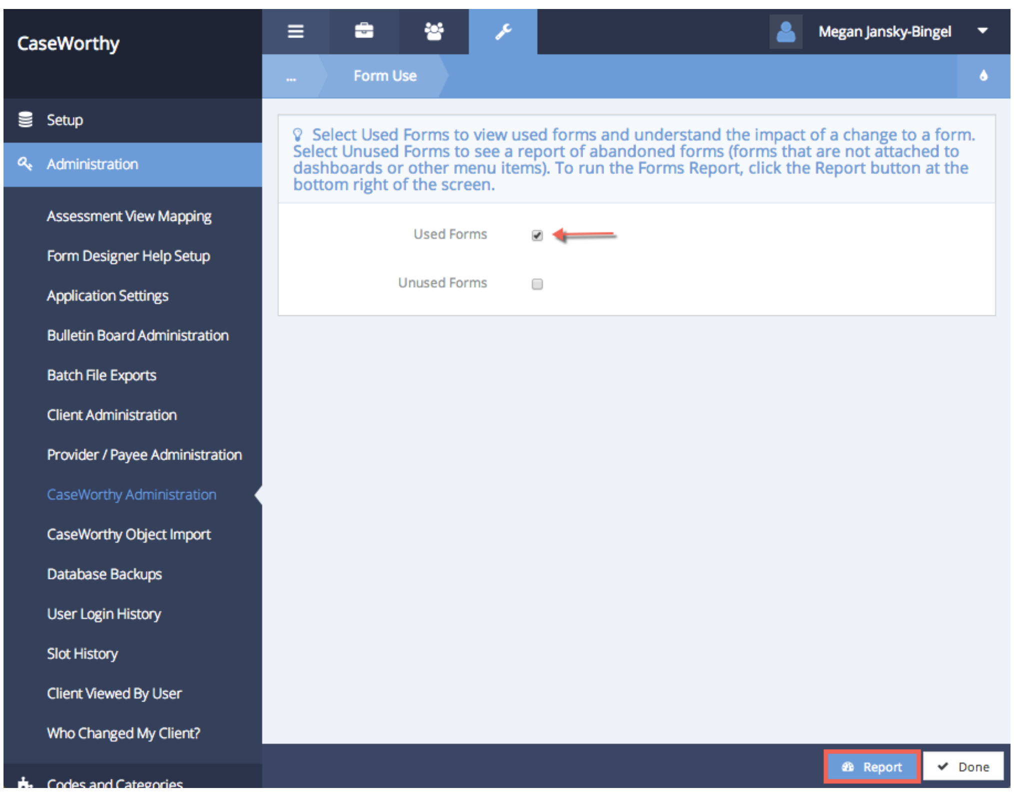
Forms

To view forms that are active and currently in use, click on the Forms icon. On the launch page, select “Used Forms” and click on the 

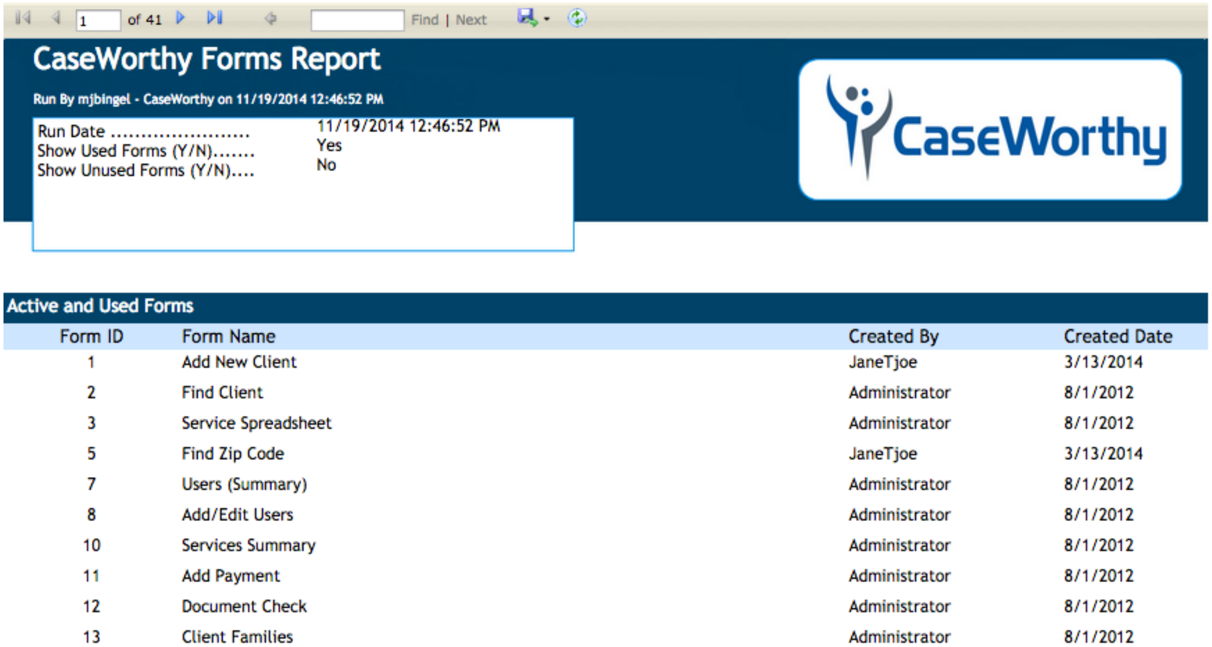
button. A report displays listing the form ID and name as well as who created it and when.



CaseWorthy
Megan Jansky-Bingel
Dashboard
Setup
Administration
Assessment View Mapping
Form Designer Help Setup
Application Settings
Bulletin Board Administration
Batch File Exports
Client Administration
Provider / Payee Administration
CaseWorthy Administration
CaseWorthy Object Import
Database Backups
User Login History
Slot History
Client Viewed By User
Who Changed My Client?
Codes and Categories
Reports
Forms
Lists
Queries
Dashboards with Items
Name of Report on Form



CaseWorthy
Megan Jansky-Bingel
Form Use
Setup
Administration
Assessment View Mapping
Form Designer Help Setup
Application Settings
Bulletin Board Administration
Batch File Exports
Client Administration
Provider / Payee Administration
CaseWorthy Administration
CaseWorthy Object Import
Database Backups
User Login History
Slot History
Client Viewed By User
Who Changed My Client?
Codes and Categories
Select Used Forms to view used forms and understand the impact of a change to a form. Select Unused Forms to see a report of abandoned forms (forms that are not attached to dashboards or other menu items). To run the Forms Report, click the Report button at the bottom right of the screen.
Used Forms
Unused Forms
Report
Done



CaseWorthy Forms Report

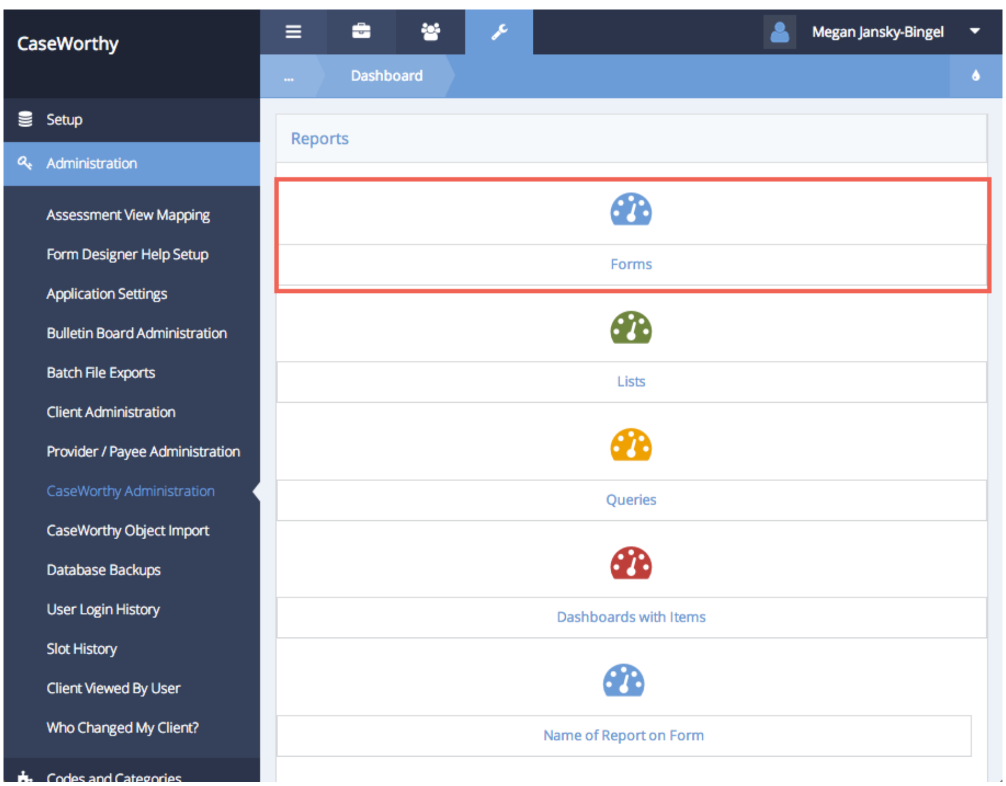
Run By mjbingel - CaseWorthy on 11/19/2014 12:46:52 PM

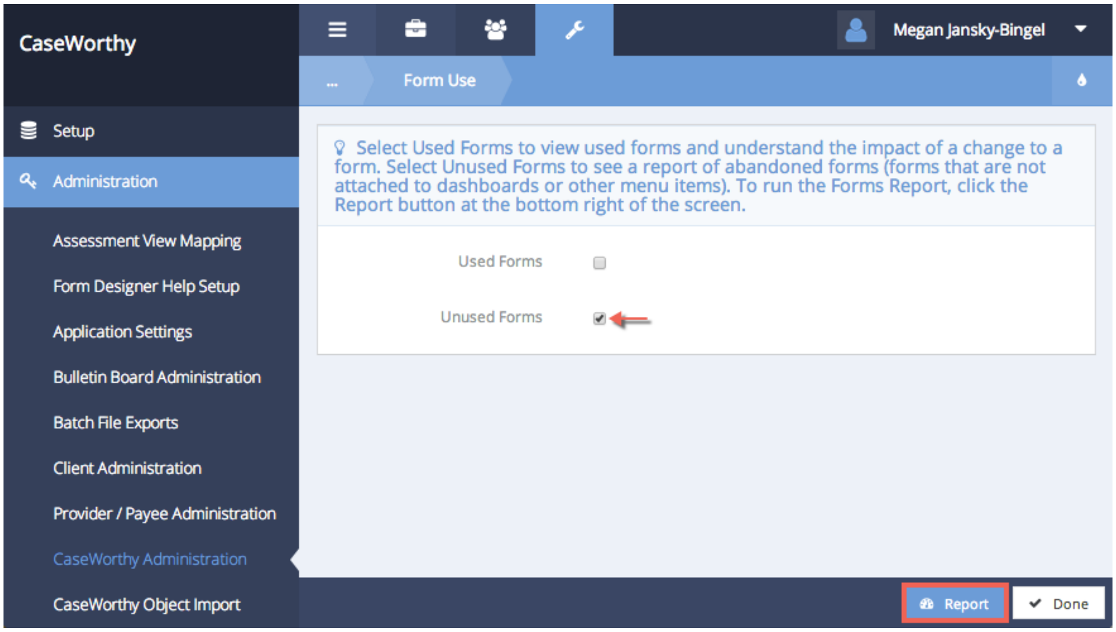
Run Date .... 11/19/2014 12:46:52 PM
Show Used Forms (Y/N)....... Yes
Show Unused Forms (Y/N).... No

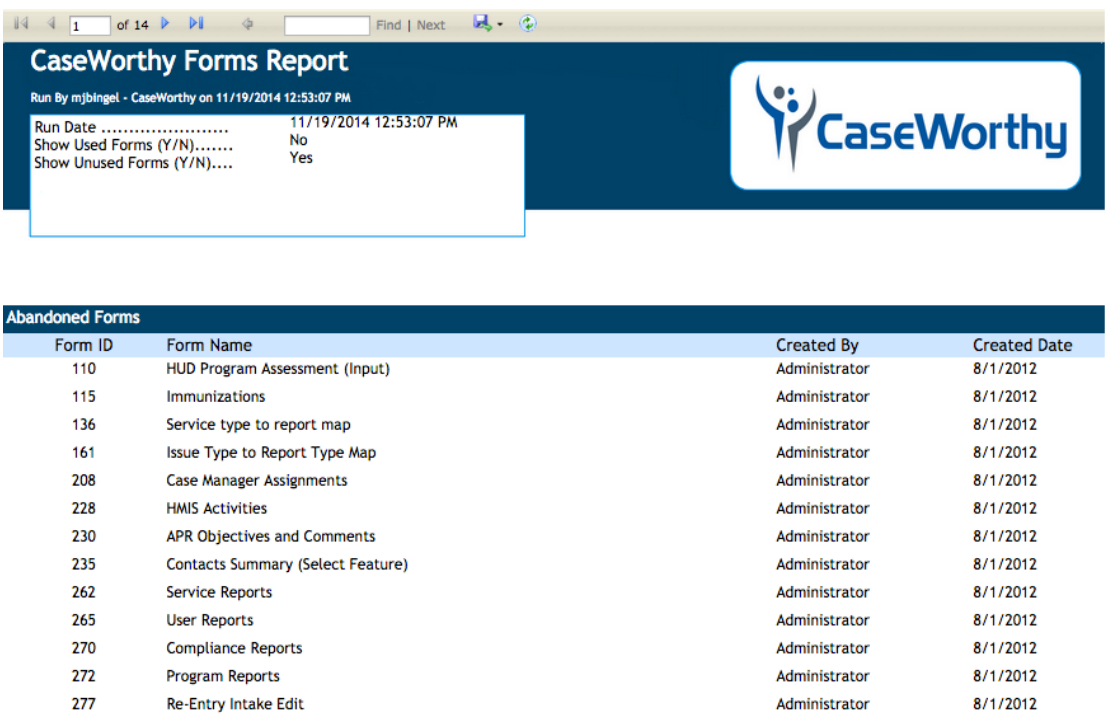
Active and Used Forms

Form ID	Form Name	Created By	Created Date
1	Add New Client	JaneTjoe	3/13/2014
2	Find Client	Administrator	8/1/2012
3	Service Spreadsheet	Administrator	8/1/2012
5	Find Zip Code	JaneTjoe	3/13/2014
7	Users (Summary)	Administrator	8/1/2012
8	Add/Edit Users	Administrator	8/1/2012
10	Services Summary	Administrator	8/1/2012
11	Add Payment	Administrator	8/1/2012
12	Document Check	Administrator	8/1/2012
13	Client Families	Administrator	8/1/2012

To view Unused forms that are not linked anywhere in the system, click on the Forms icon. On the launch page, select “Unused Forms” and click on the Report button. A report displays listing the form ID and name as well as who created it and when.





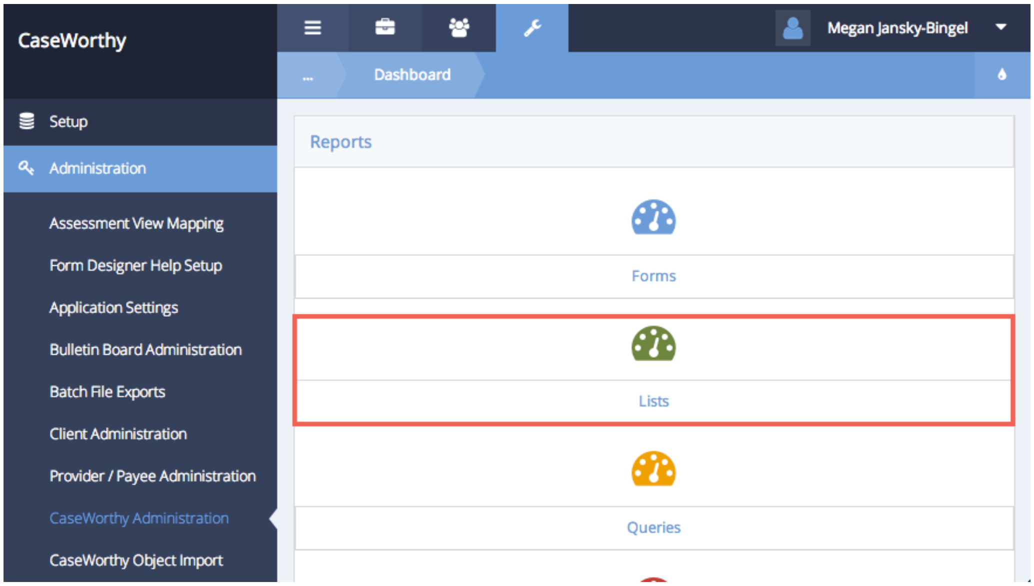


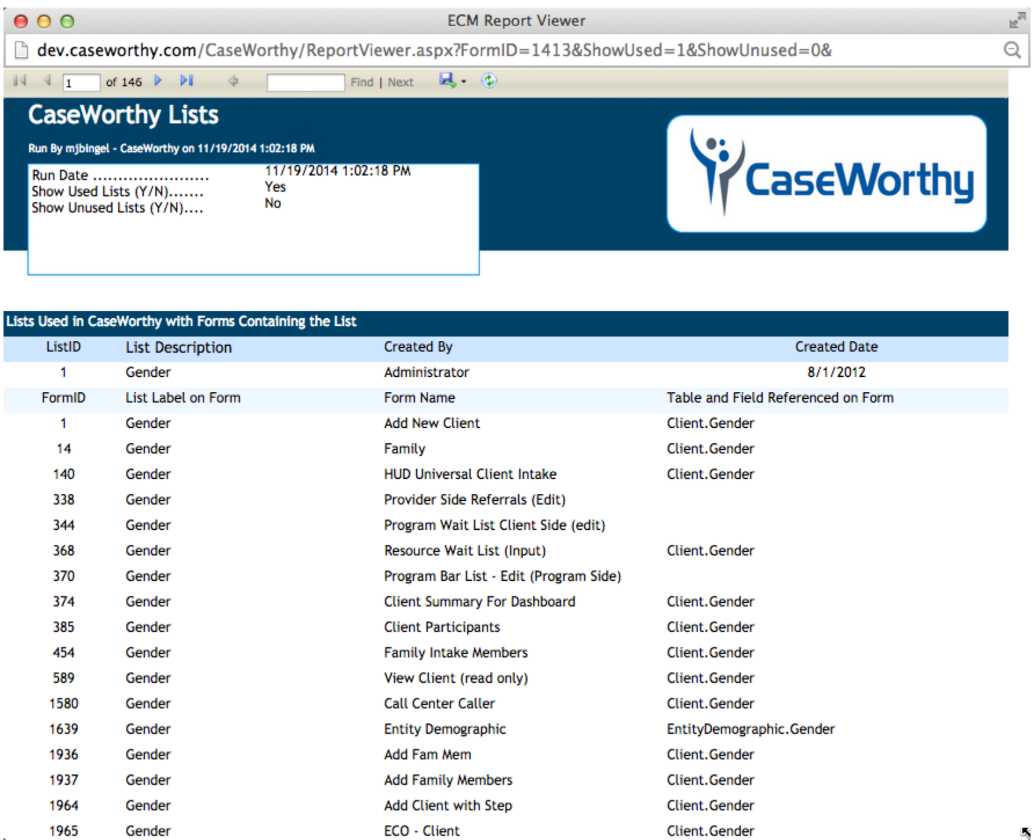
Abandoned Forms

Form ID	Form Name	Created By	Created Date
110	HUD Program Assessment (Input)	Administrator	8/1/2012
115	Immunizations	Administrator	8/1/2012
136	Service type to report map	Administrator	8/1/2012
161	Issue Type to Report Type Map	Administrator	8/1/2012
208	Case Manager Assignments	Administrator	8/1/2012
228	HMIS Activities	Administrator	8/1/2012
230	APR Objectives and Comments	Administrator	8/1/2012
235	Contacts Summary (Select Feature)	Administrator	8/1/2012
262	Service Reports	Administrator	8/1/2012
265	User Reports	Administrator	8/1/2012
270	Compliance Reports	Administrator	8/1/2012
272	Program Reports	Administrator	8/1/2012
277	Re-Entry Intake Edit	Administrator	8/1/2012

Lists

To view lists that are active and currently in use, click on the Lists icon. On the launch page, select "Used Lists" and click on the Report button. A report displays listing the list ID and name as well as who created it and when.

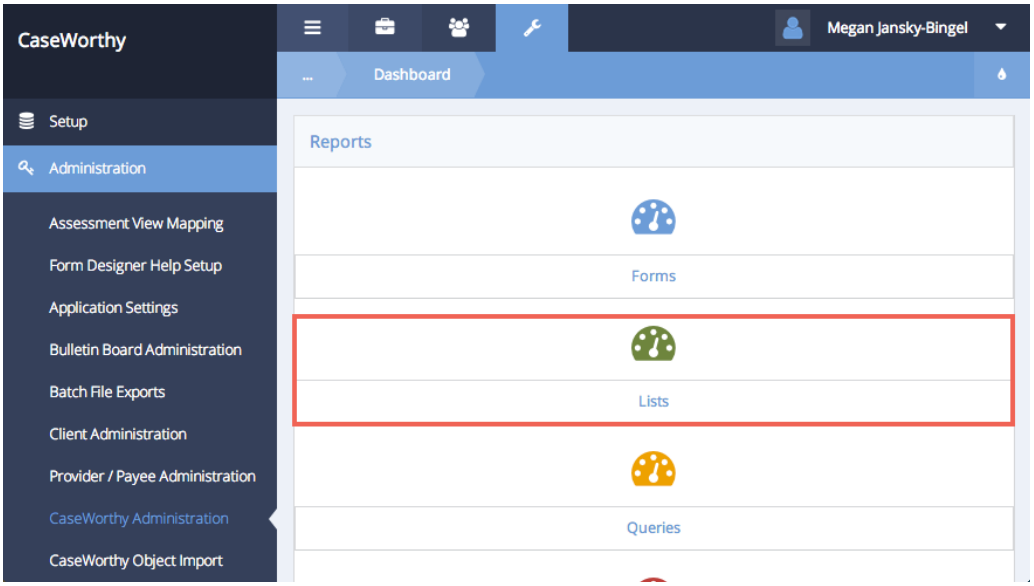




Lists Used in CaseWorthy with Forms Containing the List

ListID	List Description	Created By	Created Date
1	Gender	Administrator	8/1/2012
FormID	**List Label on Form**	**Form Name**	**Table and Field Referenced on Form**
1	Gender	Add New Client	Client.Gender
14	Gender	Family	Client.Gender
140	Gender	HUD Universal Client Intake	Client.Gender
338	Gender	Provider Side Referrals (Edit)	
344	Gender	Program Wait List Client Side (edit)	
368	Gender	Resource Wait List (Input)	Client.Gender
370	Gender	Program Bar List - Edit (Program Side)	
374	Gender	Client Summary For Dashboard	Client.Gender
385	Gender	Client Participants	Client.Gender
454	Gender	Family Intake Members	Client.Gender
589	Gender	View Client (read only)	Client.Gender
1580	Gender	Call Center Caller	Client.Gender
1639	Gender	Entity Demographic	EntityDemographic.Gender
1936	Gender	Add Fam Mem	Client.Gender
1937	Gender	Add Family Members	Client.Gender
1964	Gender	Add Client with Step	Client.Gender
1965	Gender	ECO - Client	Client.Gender

To view lists that are inactive and unused, click on the Lists icon. On the launch page, select "Unused Lists" and click on the Report button. A report displays listing the list ID and name as well as who created it and when.


CaseWorthy
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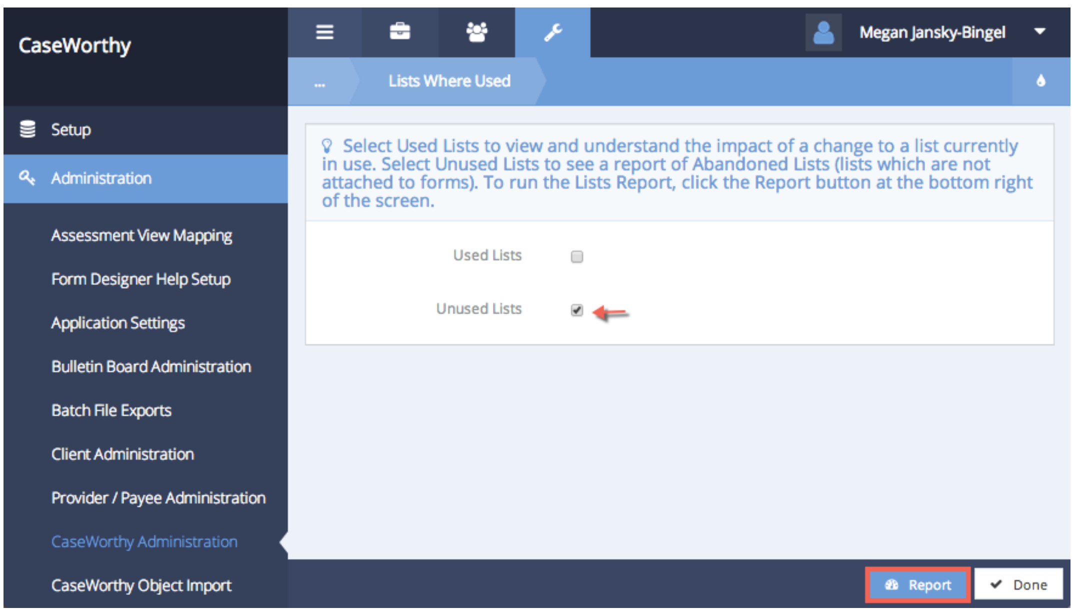
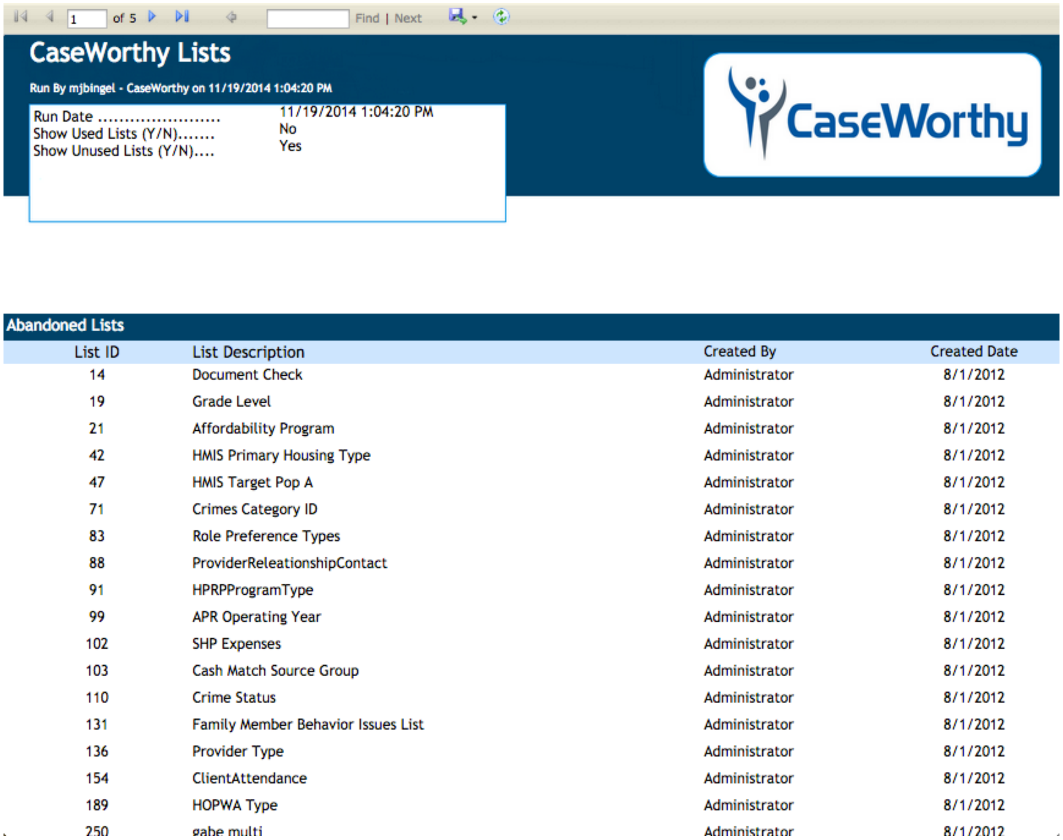
Batch File Exports
Client Administration
Provider / Payee Administration
CaseWorthy Administration
CaseWorthy Object Import
Reports
Forms
Lists
Queries


CaseWorthy
Megan Jansky-Bingel
Lists Where Used
Setup
Administration
Assessment View Mapping
Form Designer Help Setup
Application Settings
Bulletin Board Administration
Batch File Exports
Client Administration
Provider / Payee Administration
CaseWorthy Administration
CaseWorthy Object Import
Select Used Lists to view and understand the impact of a change to a list currently in use. Select Unused Lists to see a report of Abandoned Lists (lists which are not attached to forms). To run the Lists Report, click the Report button at the bottom right of the screen.
Used Lists
Unused Lists
Report
Done



1 of 5 Find | Next

CaseWorthy Lists

Run By mjbingel - CaseWorthy on 11/19/2014 1:04:20 PM

Run Date	11/19/2014 1:04:20 PM
Show Used Lists (Y/N).......	No
Show Unused Lists (Y/N)....	Yes

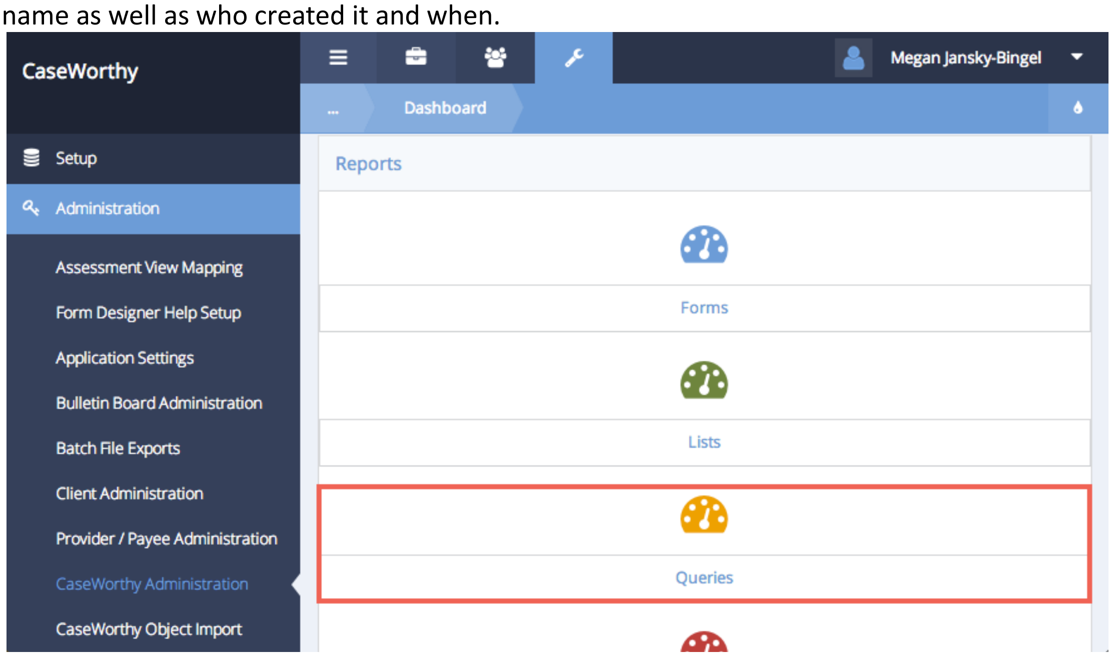
CaseWorthy

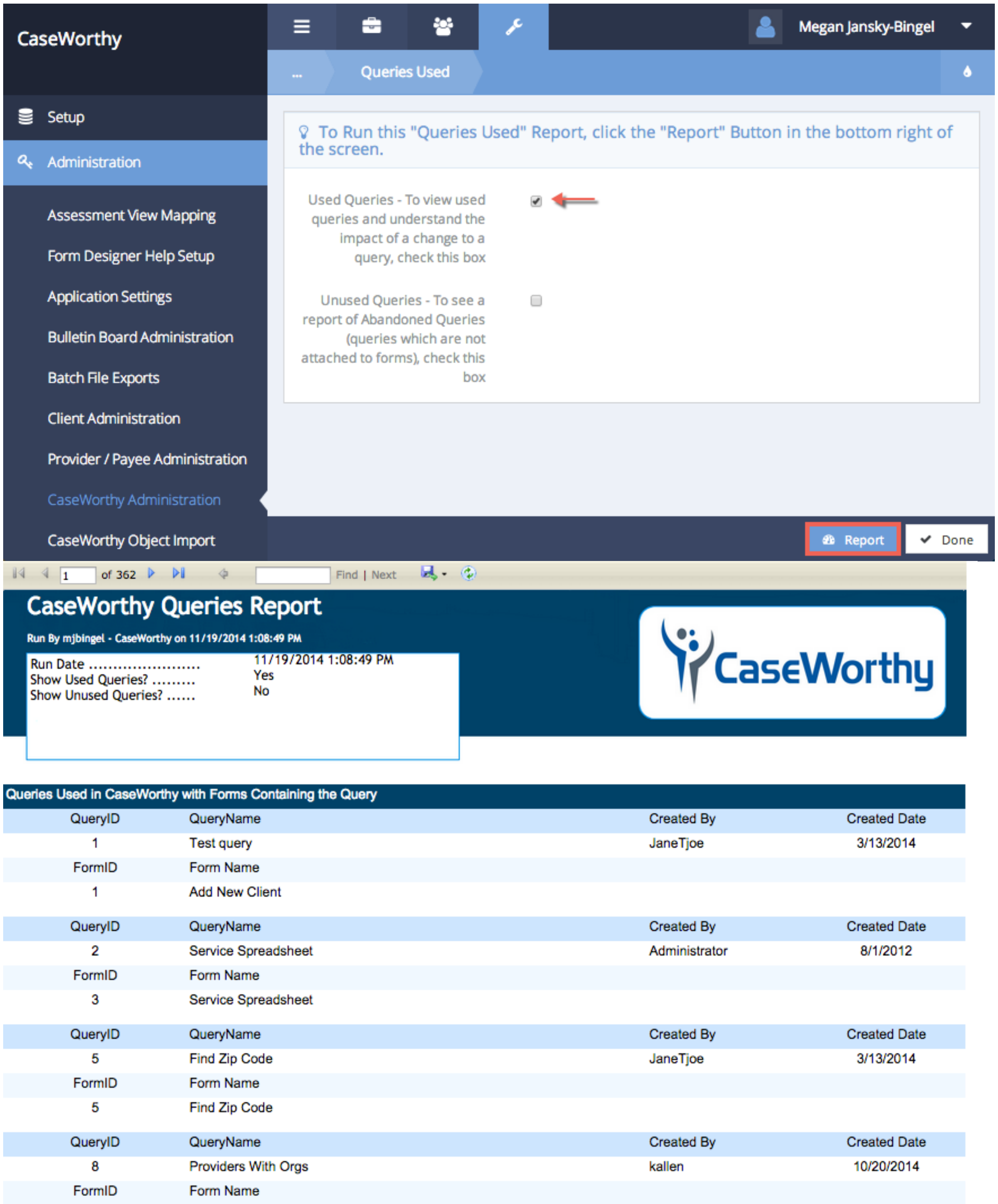
Abandoned Lists

List ID	List Description	Created By	Created Date
14	Document Check	Administrator	8/1/2012
19	Grade Level	Administrator	8/1/2012
21	Affordability Program	Administrator	8/1/2012
42	HMIS Primary Housing Type	Administrator	8/1/2012
47	HMIS Target Pop A	Administrator	8/1/2012
71	Crimes Category ID	Administrator	8/1/2012
83	Role Preference Types	Administrator	8/1/2012
88	ProviderReleationshipContact	Administrator	8/1/2012
91	HPRPProgramType	Administrator	8/1/2012
99	APR Operating Year	Administrator	8/1/2012
102	SHP Expenses	Administrator	8/1/2012
103	Cash Match Source Group	Administrator	8/1/2012
110	Crime Status	Administrator	8/1/2012
131	Family Member Behavior Issues List	Administrator	8/1/2012
136	Provider Type	Administrator	8/1/2012
154	ClientAttendance	Administrator	8/1/2012
189	HOPWA Type	Administrator	8/1/2012
250	gabe multi	Administrator	8/1/2012

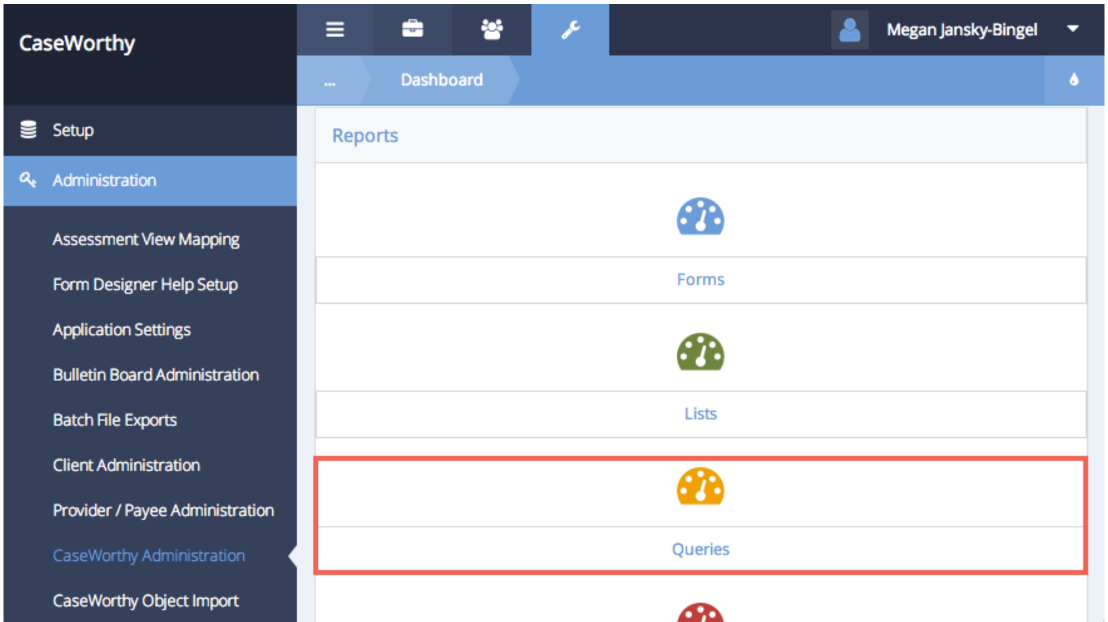
Queries

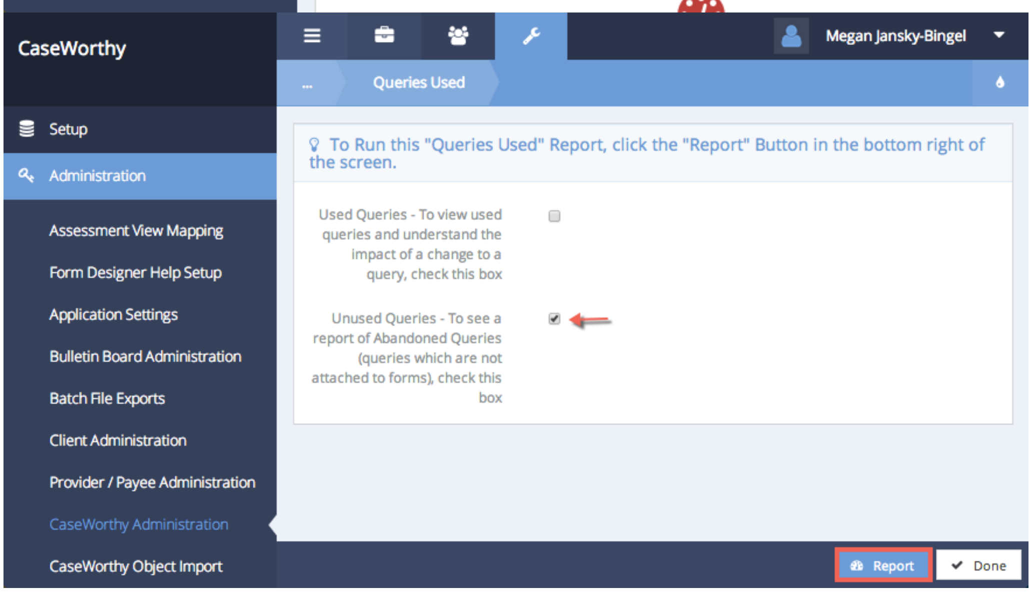
To view queries that are active and currently in use, click on the Queries icon. On the launch page, select "Used Queries" and click on the Report button. A report displays listing the query and form IDs and name as well as who created it and when.

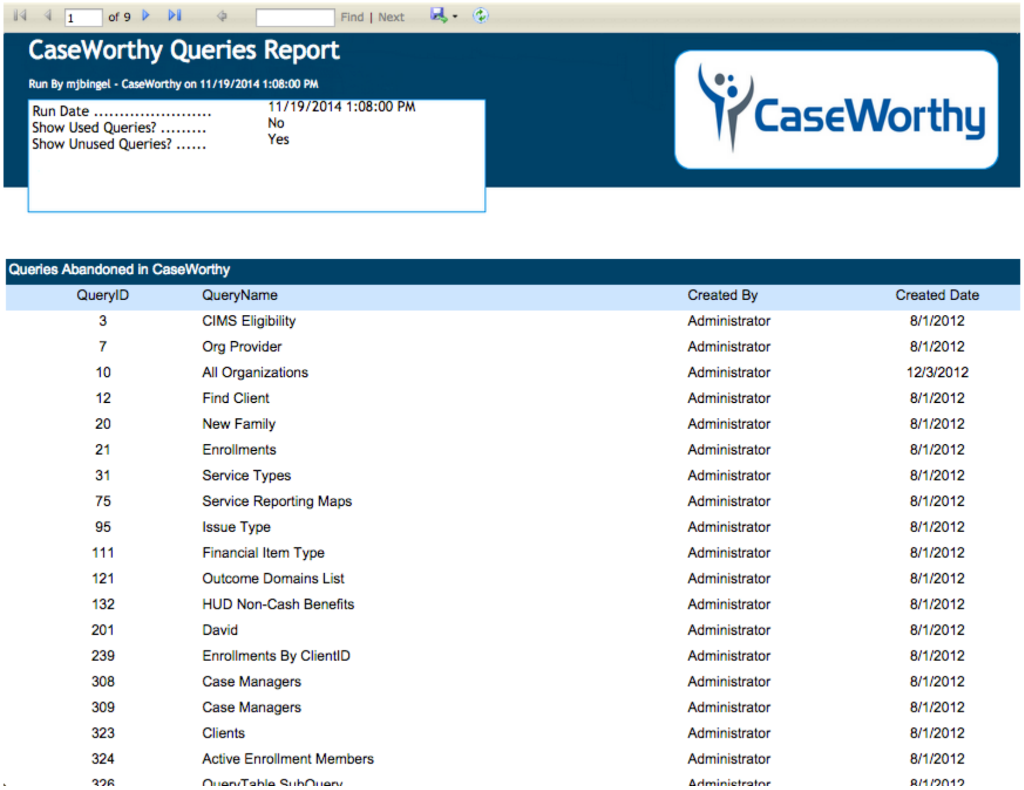




To view queries that are inactive and currently in unused, click on the Queries icon. On the launch page, select "Unused Queries" and click on the Report button. A report displays listing the query and form IDs and name as well as who created it and when.


CaseWorthy
Megan Jansky-Bingel
Dashboard
Setup
Administration
Assessment View Mapping
Form Designer Help Setup
Application Settings
Bulletin Board Administration
Batch File Exports
Client Administration
Provider / Payee Administration
CaseWorthy Administration
CaseWorthy Object Import
Reports
Forms
Lists
Queries


CaseWorthy
Megan Jansky-Bingel
Queries Used
Setup
Administration
Assessment View Mapping
Form Designer Help Setup
Application Settings
Bulletin Board Administration
Batch File Exports
Client Administration
Provider / Payee Administration
CaseWorthy Administration
CaseWorthy Object Import
To Run this "Queries Used" Report, click the "Report" Button in the bottom right of the screen.
Used Queries - To view used queries and understand the impact of a change to a query, check this box
Unused Queries - To see a report of Abandoned Queries (queries which are not attached to forms), check this box
Report
Done



1 of 9 Find | Next

CaseWorthy Queries Report

Run By mjbingel - CaseWorthy on 11/19/2014 1:08:00 PM

Run Date	11/19/2014 1:08:00 PM
Show Used Queries?	No
Show Unused Queries?	Yes

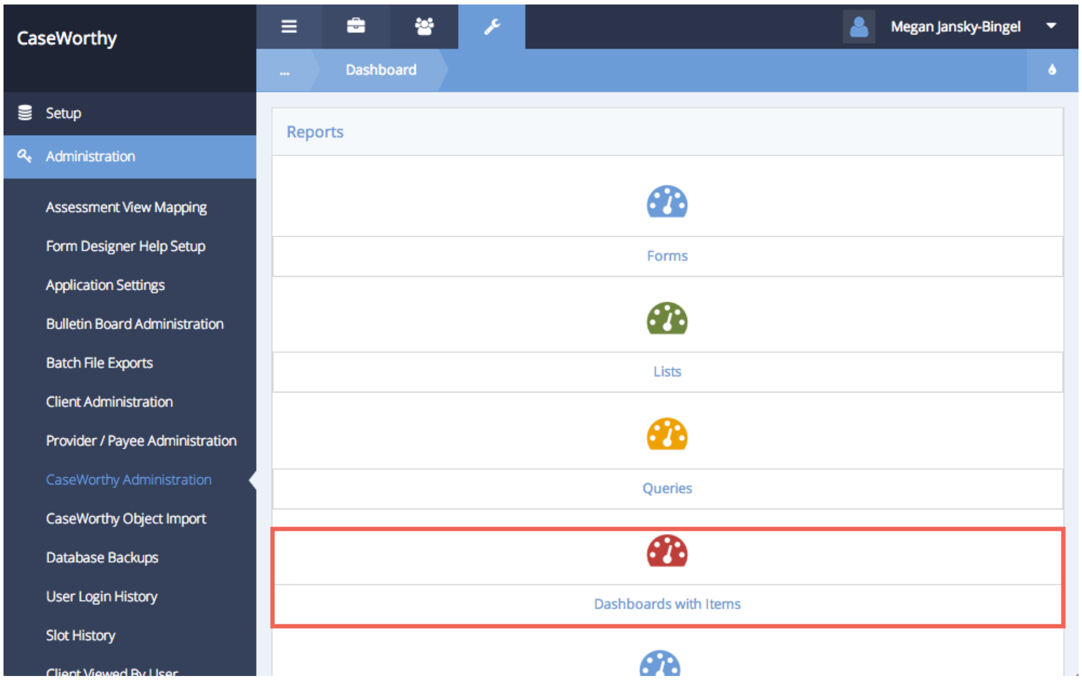
CaseWorthy

Queries Abandoned in CaseWorthy

QueryID	QueryName	Created By	Created Date
3	CIMS Eligibility	Administrator	8/1/2012
7	Org Provider	Administrator	8/1/2012
10	All Organizations	Administrator	12/3/2012
12	Find Client	Administrator	8/1/2012
20	New Family	Administrator	8/1/2012
21	Enrollments	Administrator	8/1/2012
31	Service Types	Administrator	8/1/2012
75	Service Reporting Maps	Administrator	8/1/2012
95	Issue Type	Administrator	8/1/2012
111	Financial Item Type	Administrator	8/1/2012
121	Outcome Domains List	Administrator	8/1/2012
132	HUD Non-Cash Benefits	Administrator	8/1/2012
201	David	Administrator	8/1/2012
239	Enrollments By ClientID	Administrator	8/1/2012
308	Case Managers	Administrator	8/1/2012
309	Case Managers	Administrator	8/1/2012
323	Clients	Administrator	8/1/2012
324	Active Enrollment Members	Administrator	8/1/2012
326	QueryTable SubQuery	Administrator	8/1/2012

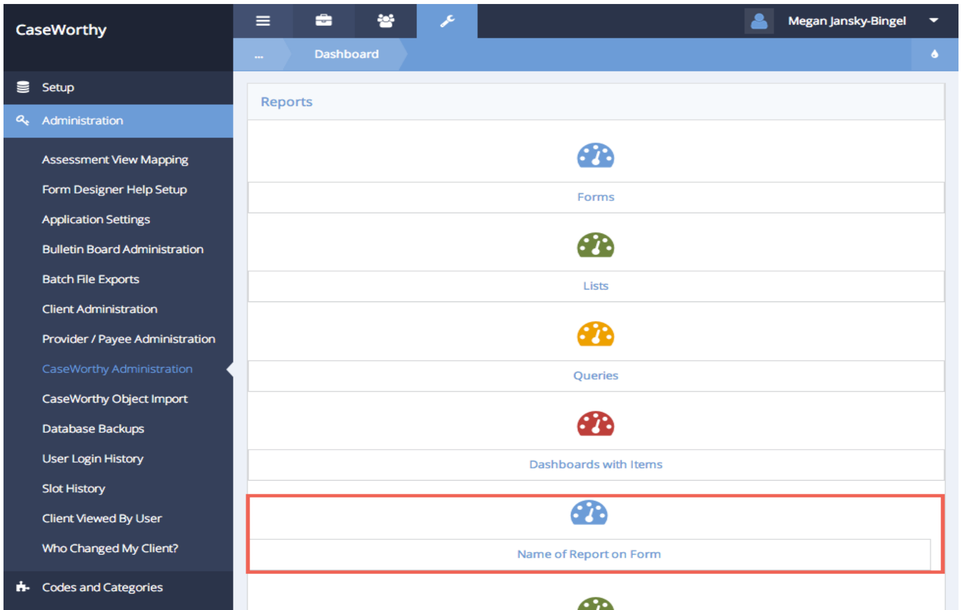
Dashboards with Items

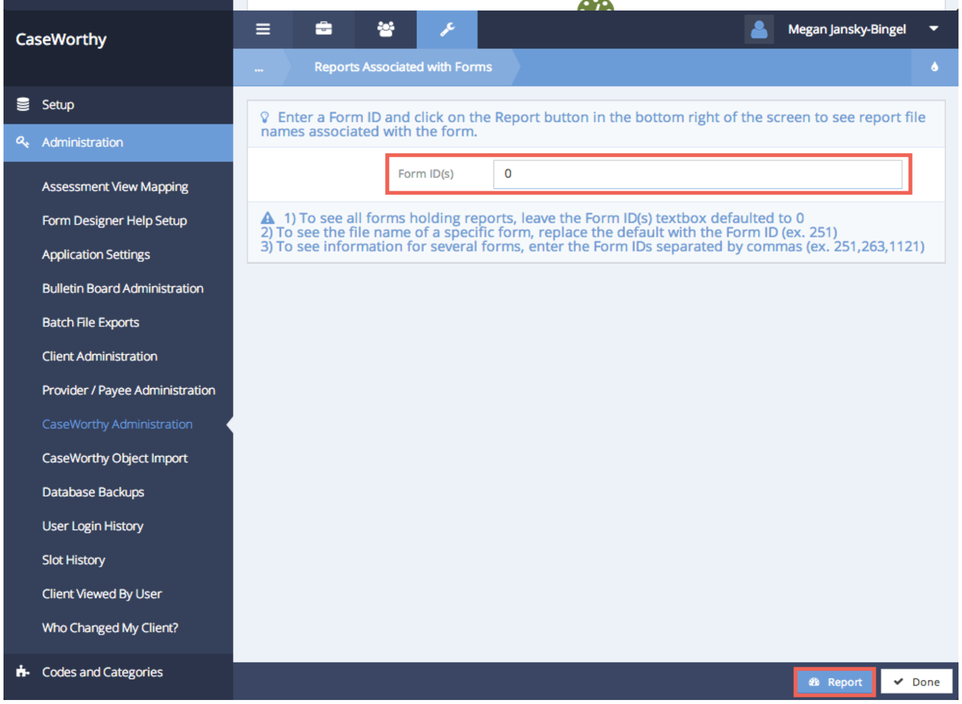
To view dashboards with items that are active and currently in use, click on the Dashboards with Items icon. On the launch page, select “Dashboards with Items” and click on the Report button. A report displays listing the dashboard IDs and name as well as who created it and when.



Name of Report on Form

Use this report to determine the file name of the Report ".rdl" which a CaseWorthy™ report launch form is linked to. Click on the “Name of Report on Form” link. On the Find File Name form, enter the form number of the report launch form to find a specific report name. To see information for several specific forms, enter the form IDs separated by a comma. Leave the field defaulted to “0” to do an open search and view all forms linked to reports. When the field is set as desired, click the Report button.


CaseWorthy
Megan Jansky-Bingel
Dashboard
Setup
Administration
Assessment View Mapping
Form Designer Help Setup
Application Settings
Bulletin Board Administration
Batch File Exports
Client Administration
Provider / Payee Administration
CaseWorthy Administration
CaseWorthy Object Import
Database Backups
User Login History
Slot History
Client Viewed By User
Who Changed My Client?
Codes and Categories
Reports
Forms
Lists
Queries
Dashboards with Items
Name of Report on Form


CaseWorthy
Megan Jansky-Bingel
Reports Associated with Forms
Setup
Administration
Assessment View Mapping
Form Designer Help Setup
Application Settings
Bulletin Board Administration
Batch File Exports
Client Administration
Provider / Payee Administration
CaseWorthy Administration
CaseWorthy Object Import
Database Backups
User Login History
Slot History
Client Viewed By User
Who Changed My Client?
Codes and Categories
Enter a Form ID and click on the Report button in the bottom right of the screen to see report file names associated with the form.
Form ID(s)
0
1) To see all forms holding reports, leave the Form ID(s) textbox defaulted to 0
2) To see the file name of a specific form, replace the default with the Form ID (ex. 251)
3) To see information for several forms, enter the Form IDs separated by commas (ex. 251,263,1121)
Report
Done

1 of 3 Find | Next

What Is the Name of the Report on a Form?

Run By mjbingel - CaseWorthy on 11/19/2014 1:12:46 PM

Run Date .... 11/19/2014 1:12:46 PM

CaseWorthy

Use this table to find the name of Report File Being Saved by a Form - Custom Reports will Display Additional "Location" Information for Programmers		
Form ID	Form Name	Report Name
251	Program Summary Report	Program_Summary_v4
263	Service Summary Report	ServiceSummary_v5
264	Clients Served Report	ClientsServed
266	User Login Report	User_Login
267	Case Load Report	Case_Load_v4
269	AprDetail	AprDetail
271	HPRP Report	NewHPRPServices_APR
273	Program Retention Report	Program_Retention_v4
286	Client Referrals	ReferralReport_FormID286
400	Roster Report	RosterReport_FormID400
408	Housing Report	Housing Report
412	Enroll Check-In From Usage	HousingCheckIn
413	Enrollment Check-In Report	HousingCheckIn
455	Availability Report	AvailabilityReport
457	ReferralReport	ReferralReport_FormID286
460	CSBG Report	CSBG
463	Program Service Summary Report	ProgramServiceSummary_v5
467	CSBG | Section G Report	CSBG_v5
468	Program Services Monthly Summary Report	ProgramServicesMonthlySummary_v5
500	HOPWA Launch Form	HOPWA

Manage CaseWorthy™ Objects

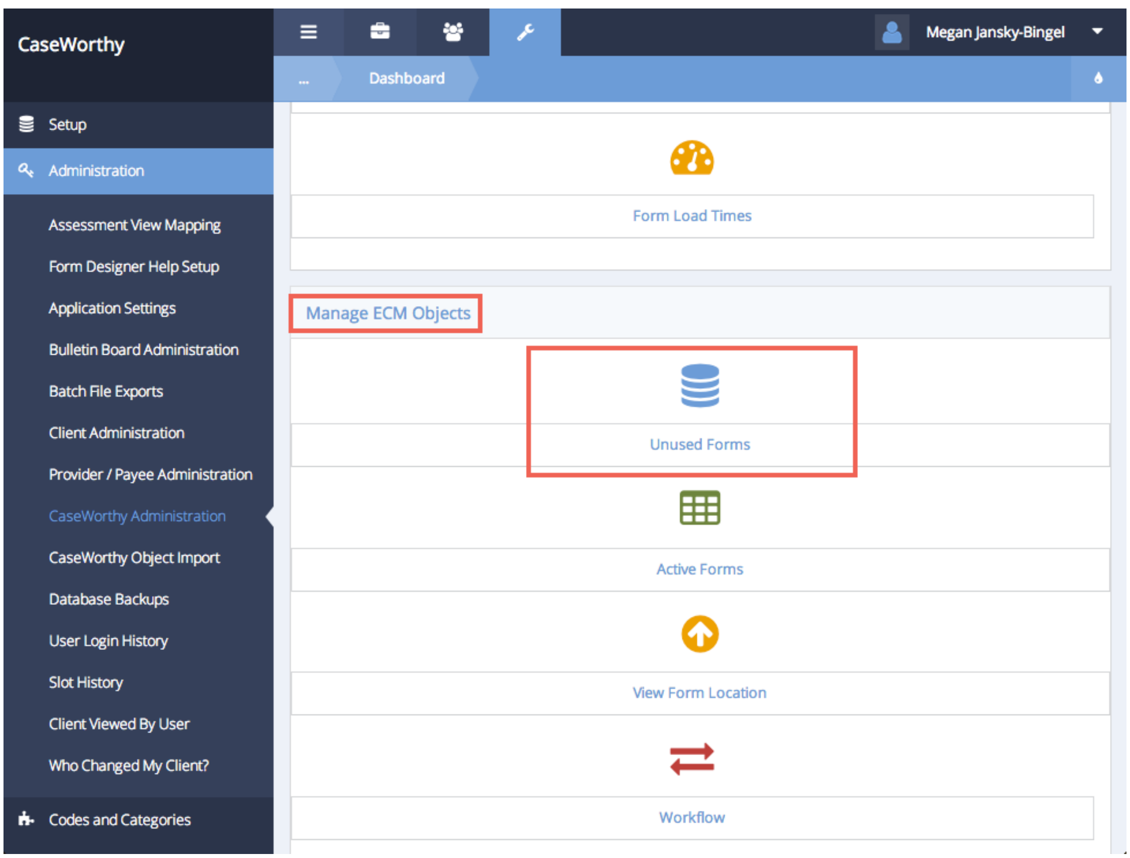
(Administration>Administration>CaseWorthy™ Administration>Manage CaseWorthy™ Objects)

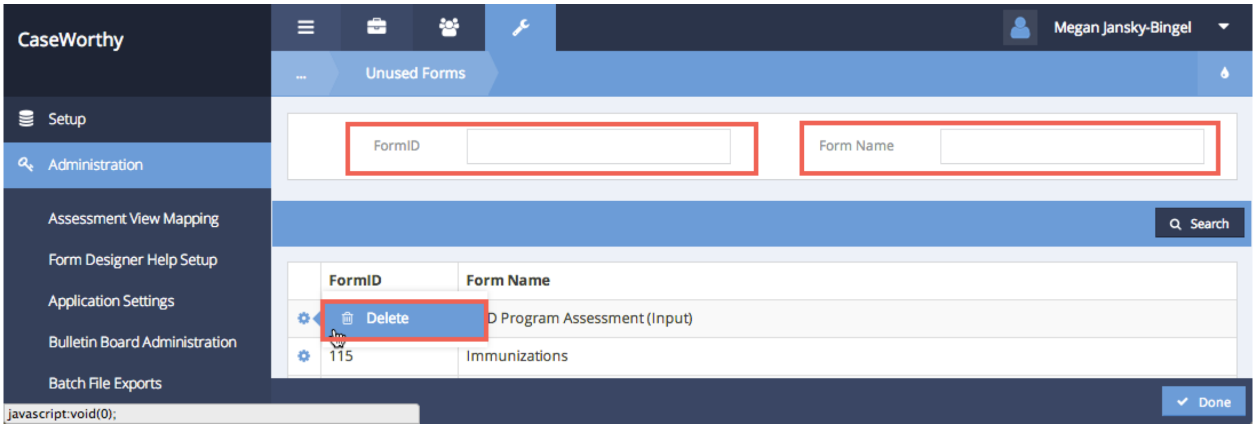
This area allows system administrators to easily access and manage forms within the system.

Unused Forms

To clean up the system and easily remove unused forms, click the Unused Forms icon. The Unused Forms search form displays. Search by entering either the form name or the form ID. Using the Unused Form Report assists in determining which forms are unused and need to be removed. Once the search results appear, click on the action gear next to the desired form and select "Delete" to remove the form from the system.

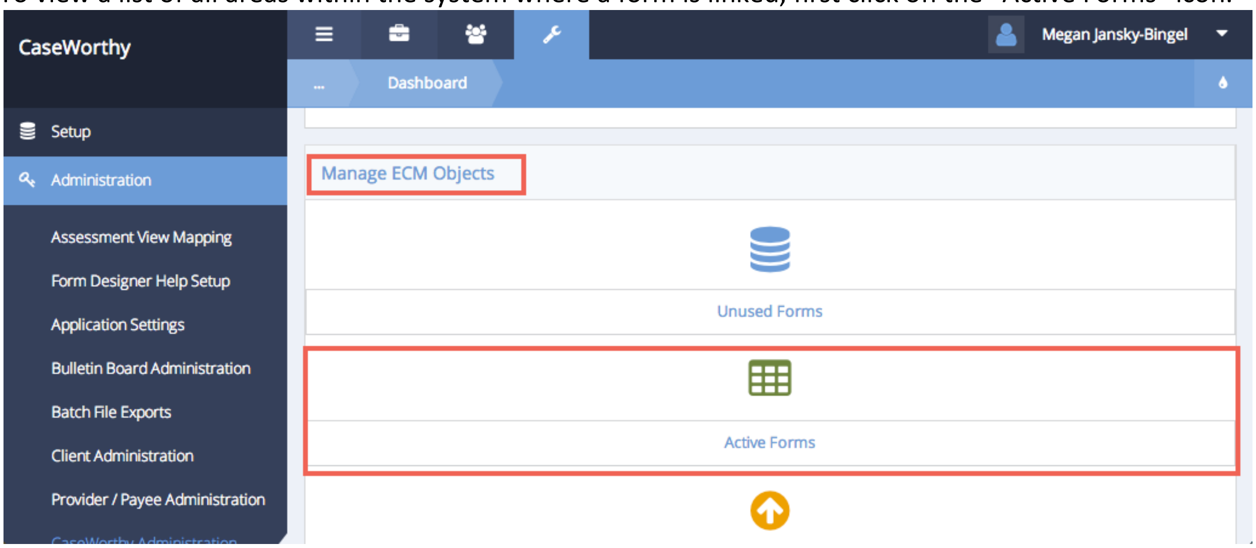
A warning message DOES NOT appear – clicking on the "Delete" option initiates the delete process IMMEDIATELY. **THIS ACTION CANNOT BE REVERSED. DELETING THE SELECTED FORM IS A PERMANENT ACTION.**



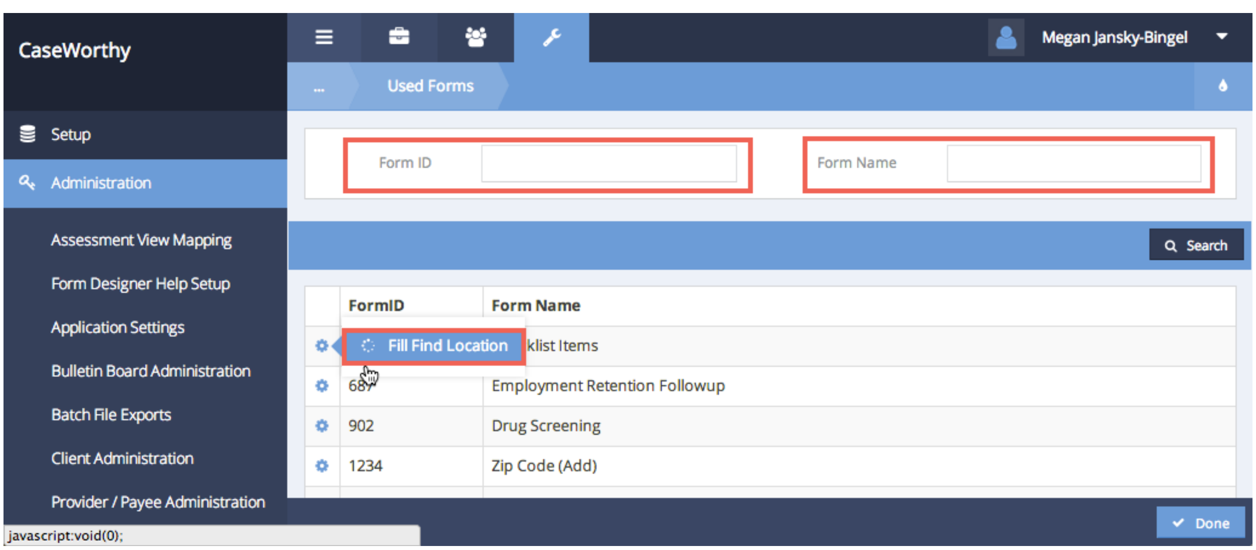


Active Forms and View Form Location

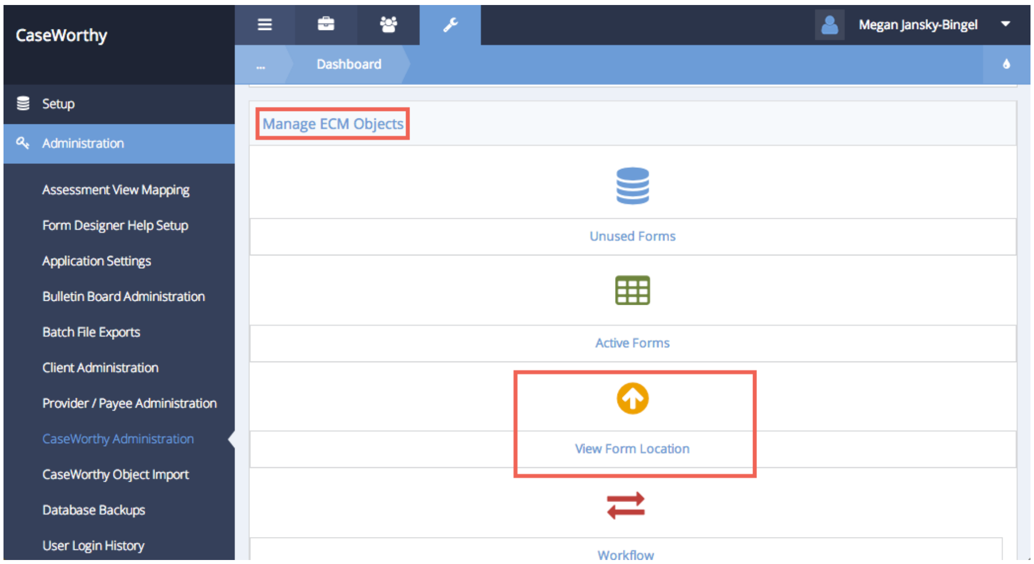
To view a list of all areas within the system where a form is linked, first click on the "Active Forms" icon.



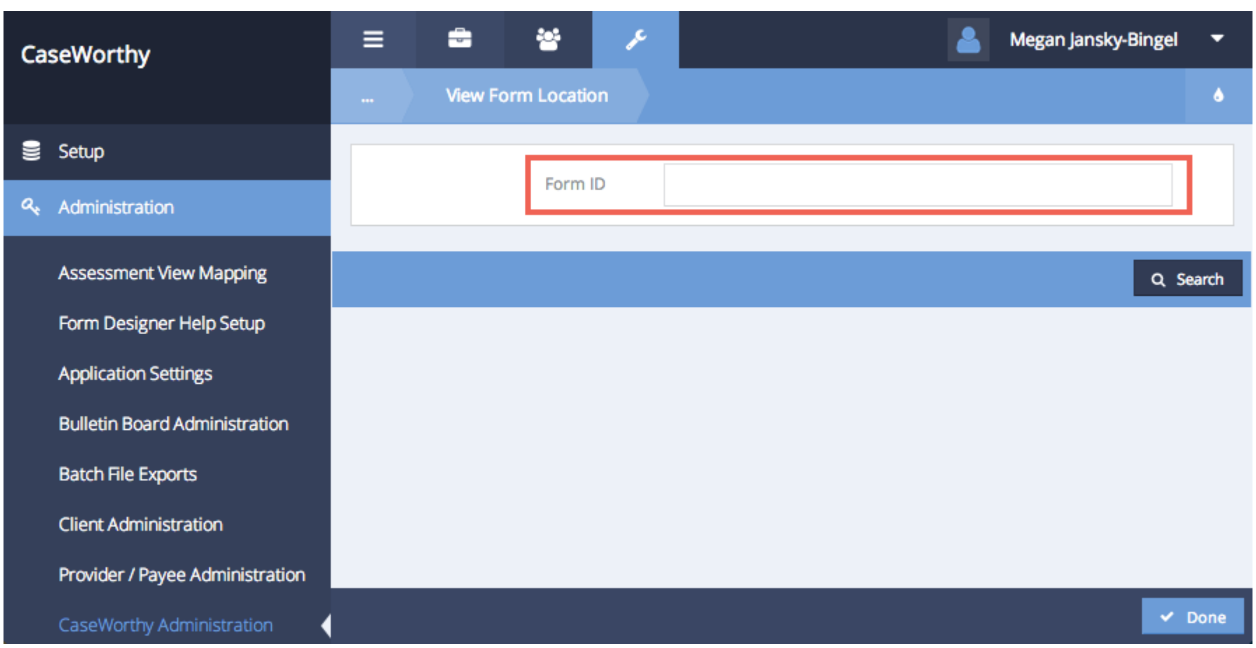
Enter the form number for the form being researched and click the Search button.



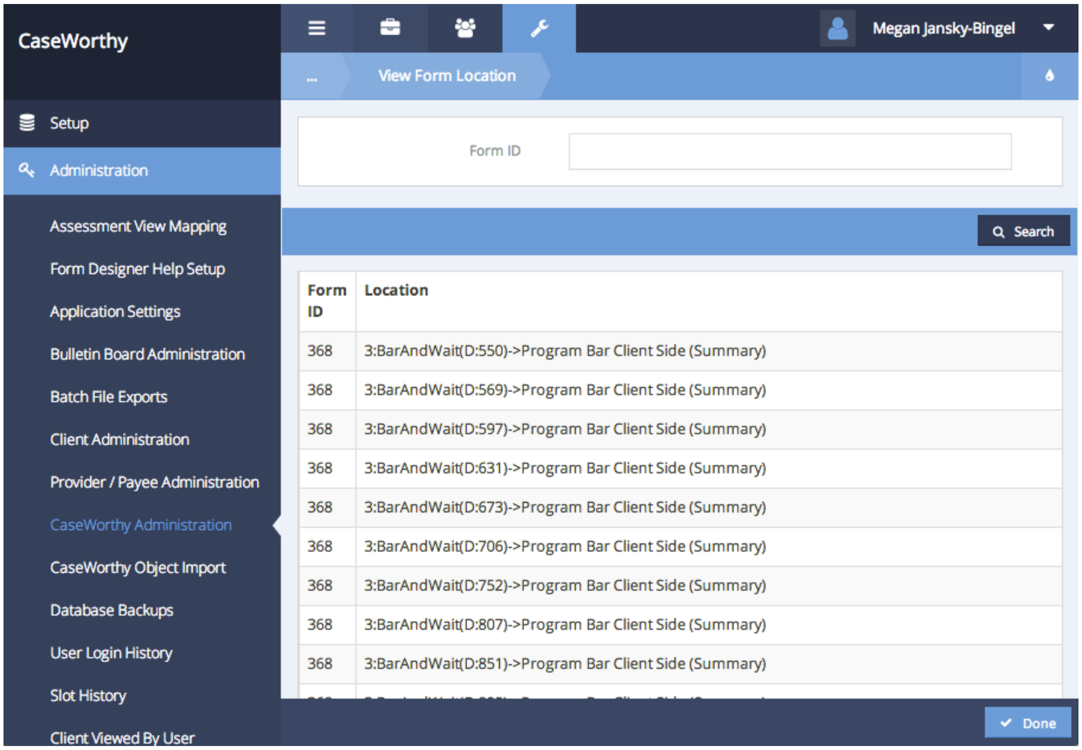
Using the Used Forms Report described above can help determine the form number. Once the search results have been returned, click on the action gear next to the desired form and select “Fill Find Location”. Click the Done button to return to the dashboard.



Next, select the “View Form Location” icon.

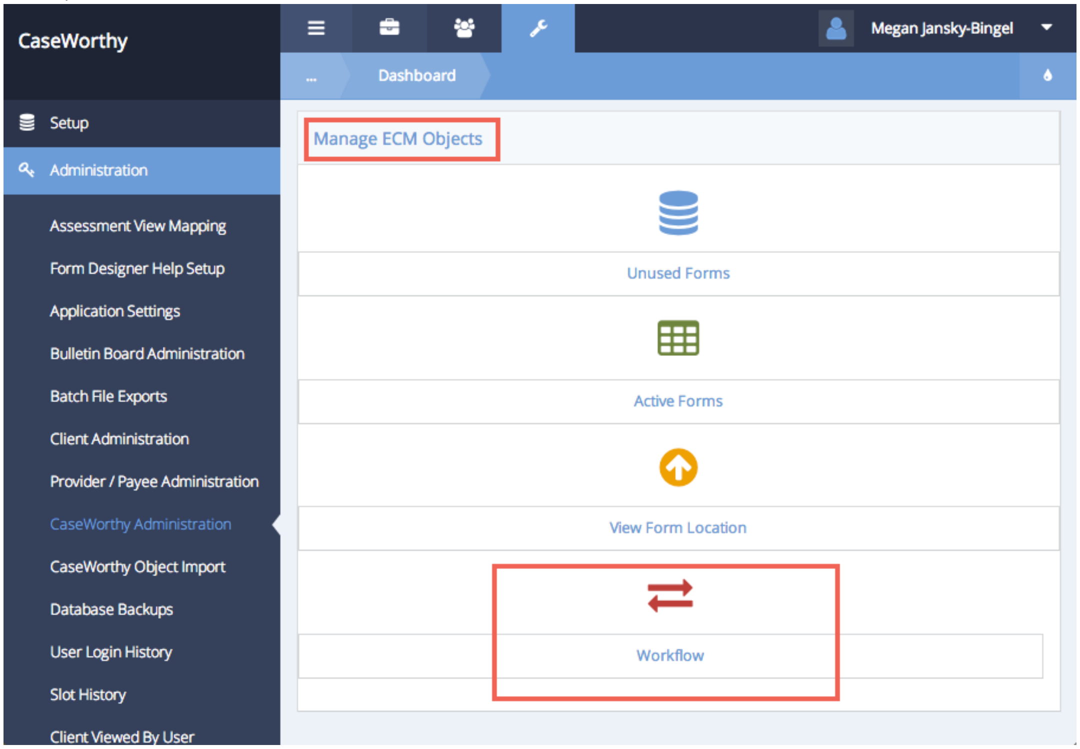


On the View Form Location form, enter the Form ID of the desired form and click the Search button. The form now displays the location and click-path for every place within the system that the form is available.

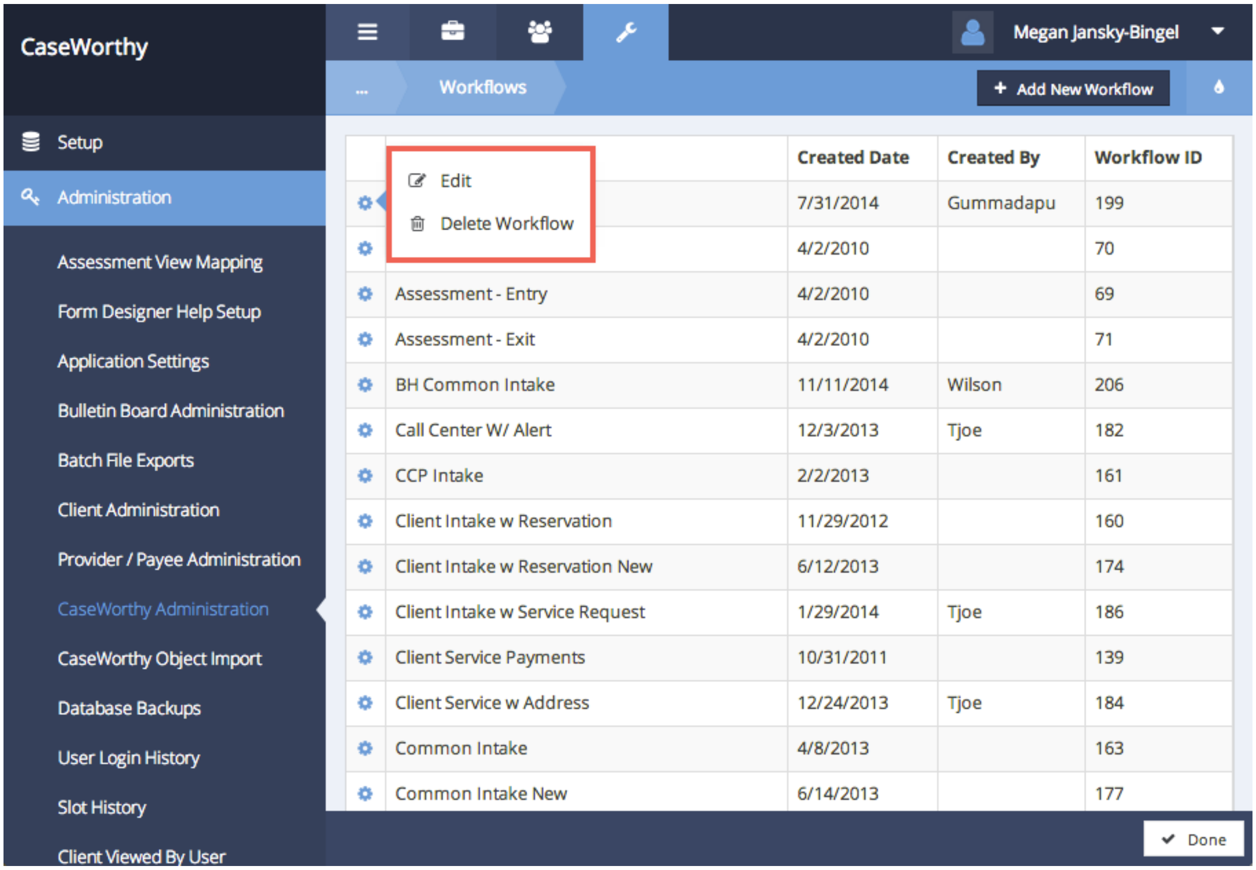

CaseWorthy
Megan Jansky-Bingel
...
View Form Location
Setup
Administration
Assessment View Mapping
Form Designer Help Setup
Application Settings
Bulletin Board Administration
Batch File Exports
Client Administration
Provider / Payee Administration
CaseWorthy Administration
CaseWorthy Object Import
Database Backups
User Login History
Slot History
Client Viewed By User
Form ID
Search
Form ID
Location
368
3:BarAndWait(D:550)->Program Bar Client Side (Summary)
368
3:BarAndWait(D:569)->Program Bar Client Side (Summary)
368
3:BarAndWait(D:597)->Program Bar Client Side (Summary)
368
3:BarAndWait(D:631)->Program Bar Client Side (Summary)
368
3:BarAndWait(D:673)->Program Bar Client Side (Summary)
368
3:BarAndWait(D:706)->Program Bar Client Side (Summary)
368
3:BarAndWait(D:752)->Program Bar Client Side (Summary)
368
3:BarAndWait(D:807)->Program Bar Client Side (Summary)
368
3:BarAndWait(D:851)->Program Bar Client Side (Summary)
Done

Workflows

To view a list of all workflows in the system with workflow name and ID as well as who created it and when, click the “Workflow” icon.



To edit or delete a workflow, select the desired option from the action gear next to the workflow name.

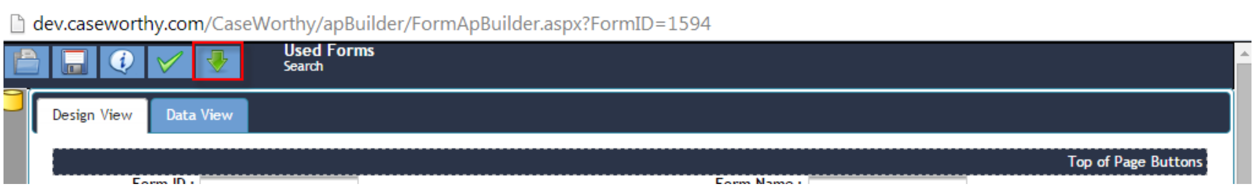

CaseWorthy
Megan Jansky-Bingel
...
Workflows
+ Add New Workflow
Setup
Administration
Assessment View Mapping
Form Designer Help Setup
Application Settings
Bulletin Board Administration
Batch File Exports
Client Administration
Provider / Payee Administration
CaseWorthy Administration
CaseWorthy Object Import
Database Backups
User Login History
Slot History
Client Viewed By User
Edit
Delete Workflow
Created Date
Created By
Workflow ID
7/31/2014 Gummadapu 199
4/2/2010 70
Assessment - Entry 4/2/2010 69
Assessment - Exit 4/2/2010 71
BH Common Intake 11/11/2014 Wilson 206
Call Center W/ Alert 12/3/2013 Tjoe 182
CCP Intake 2/2/2013 161
Client Intake w Reservation 11/29/2012 160
Client Intake w Reservation New 6/12/2013 174
Client Intake w Service Request 1/29/2014 Tjoe 186
Client Service Payments 10/31/2011 139
Client Service w Address 12/24/2013 Tjoe 184
Common Intake 4/8/2013 163
Common Intake New 6/14/2013 177
Done

CaseWorthy Object Import

(Administration>Administration>CaseWorthy Object Import)

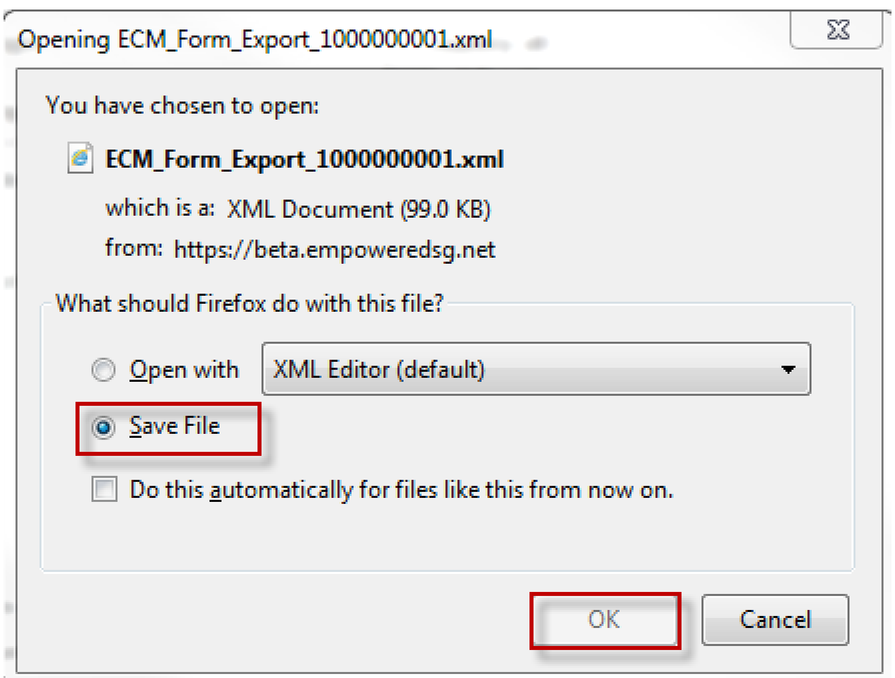
This area allows system administrators to import forms from other databases. New forms may be created, or existing forms, significantly changed in a Train or Test database, can be imported. Rather than rebuilding or recreating the changes, this feature brings the form into the current database and automatically assigns it a custom form number.

First, navigate to the targeted form in the desired database. Open the form using the Form apBuilder™ (for more information on how to use the Form apBuilder™ in CaseWorthy™, please refer to the CaseWorthy™ apBuilder™ Manual). On the top left of the form, click on the green, downward-pointing arrow icon.

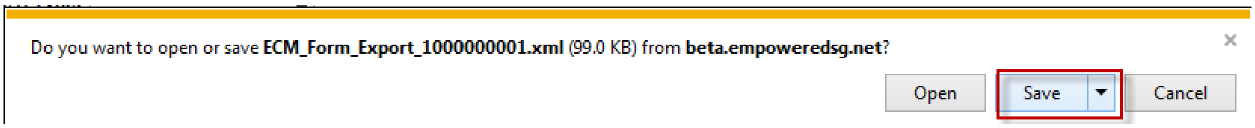


When prompted, save the file to the defaulted "downloads folder" location.

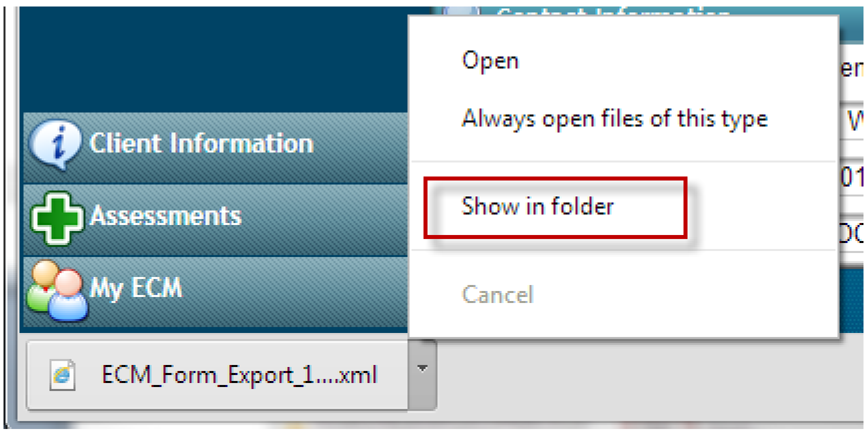
Firefox:



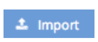
IE9:



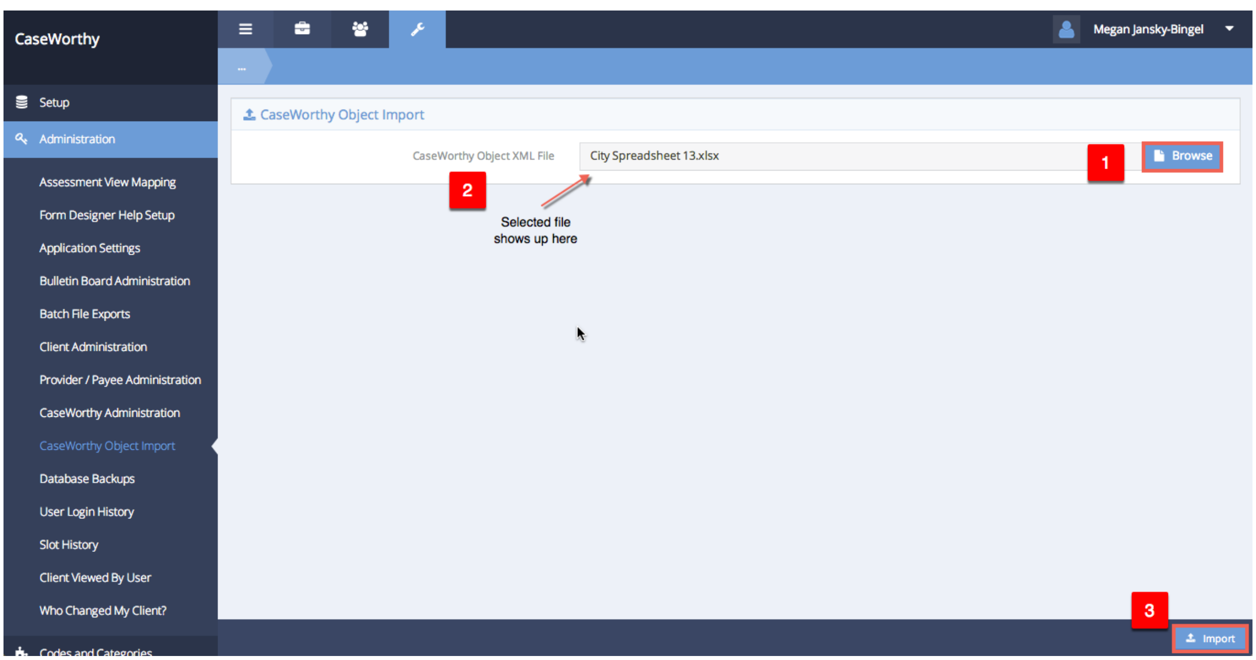
Chrome:



Once the form has been exported and downloaded, login to the desired database for import and navigate to the Form Import area.

On the Import Form, use the “browse” button to search and select the desired form. Then click the 

button on the bottom of the screen.



The form imports into the system and the new form number displays in red.

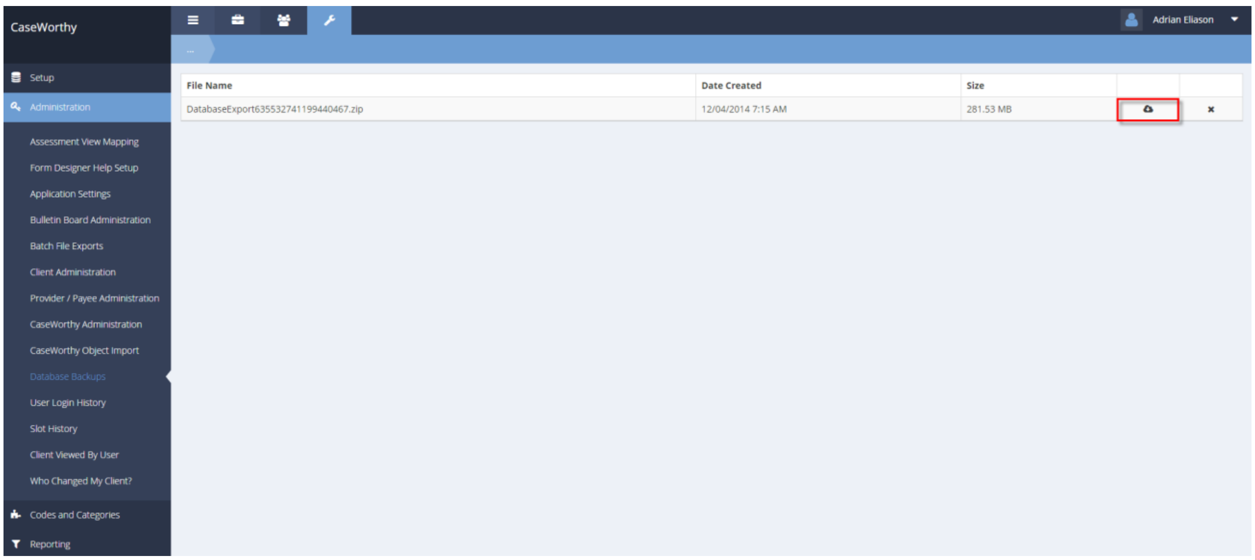
Database Backups

(Administration>Administration>Database Backups)

System administrators can schedule a database backup export through the CaseWorthy™ Batch Processor, which, once it is completed, is stored in this area as a zipped file. The file can be download and viewed using "SQL Server Management Studio”.

NOTE: Up to 3 downloads may be stored in this area. As additional downloads are scheduled, the system automatically overwrites the oldest version.

To download a file, simply click the download button next to the desired file.



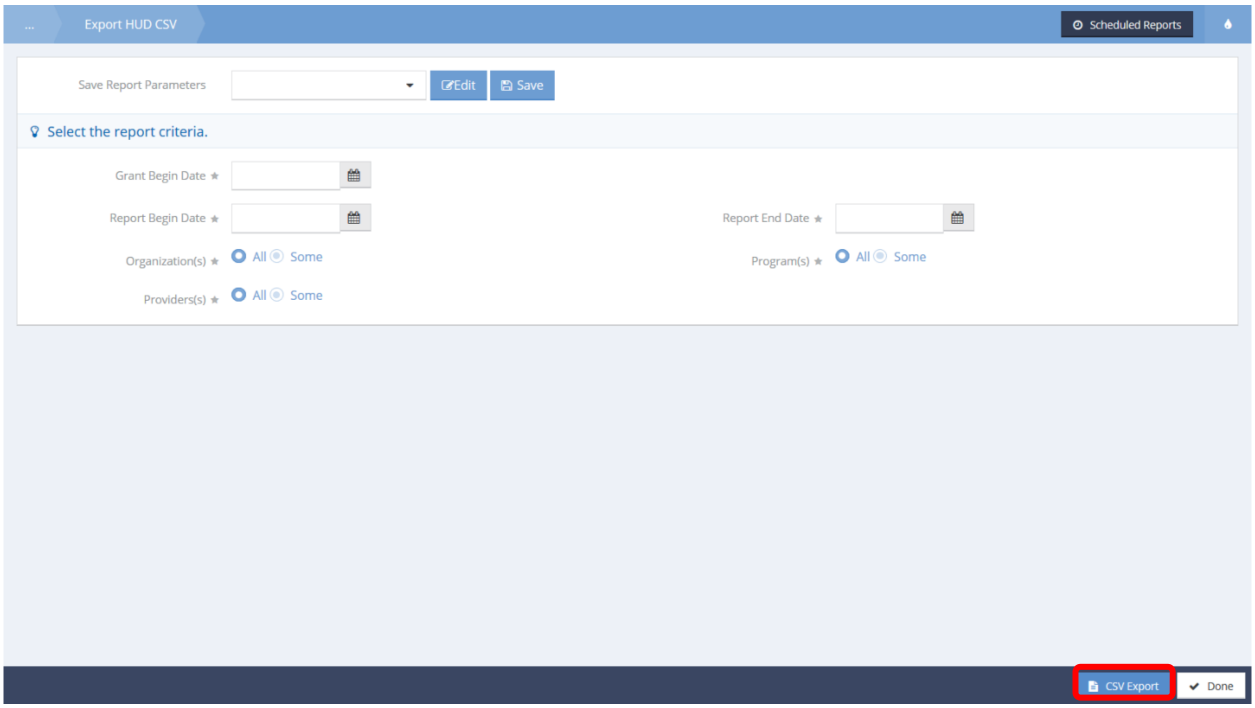
Full HUD CSV Export

HUD Export

Objective: Export HUD reports.

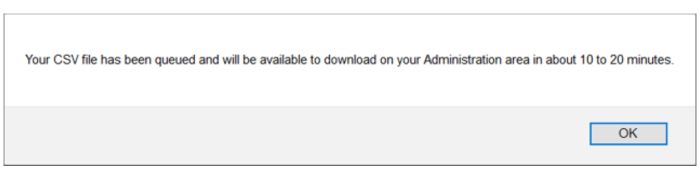
Navigation: Administration>Administration>Full HUD CSV Export

The Export HUD CSV form displays.



Enter information into required fields: Grant Begin Date, Report Begin Date, Report End Date, Organization, Program(s), and Provider(s). Click the 

button to export form. An informational pop-up box appears, click ok.

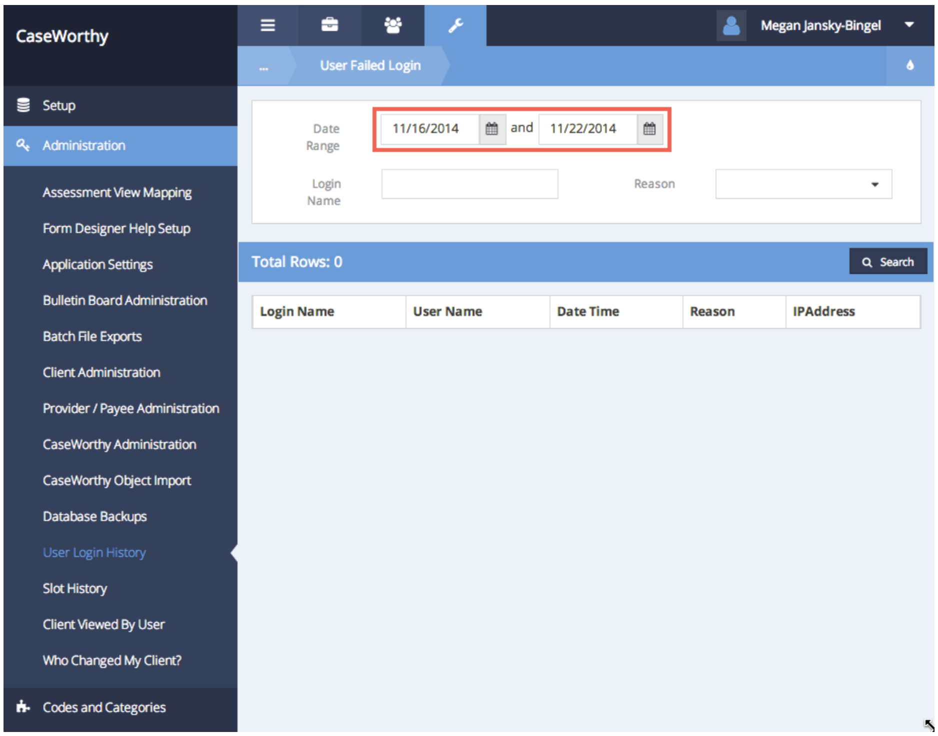


User Login History

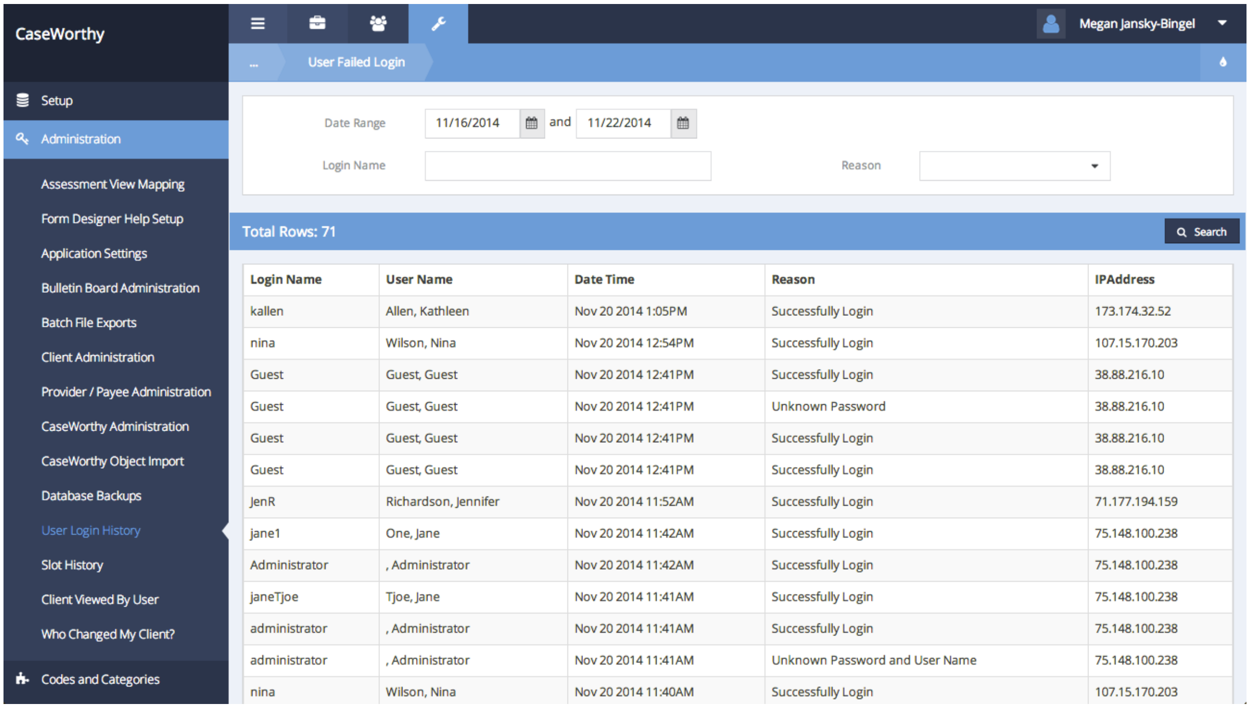
(Administration>Administration>User Login History)

This area allows system administrators to view information on user login histories within a specific week date range, by reason and/or by login name.

To view login history, set the date range. If desired, filter by login name and/or reason. Click the Search button.



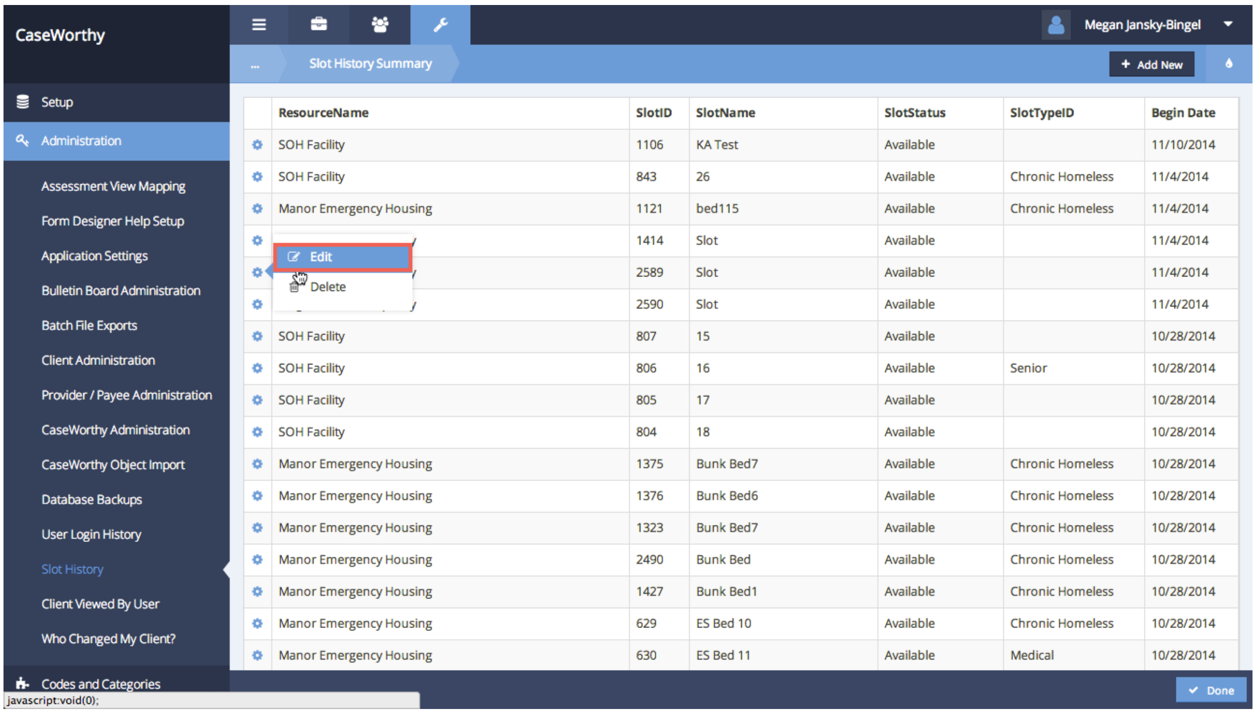
The history displays in tabular form.


CaseWorthy
Megan Jansky-Bingel
...
User Failed Login
Setup
Administration
Assessment View Mapping
Form Designer Help Setup
Application Settings
Bulletin Board Administration
Batch File Exports
Client Administration
Provider / Payee Administration
CaseWorthy Administration
CaseWorthy Object Import
Database Backups
User Login History
Slot History
Client Viewed By User
Who Changed My Client?
Codes and Categories
Date Range 11/16/2014 and 11/22/2014
Login Name
Reason
Total Rows: 71
Search
Login Name | User Name | Date Time | Reason | IPAddress
kallen | Allen, Kathleen | Nov 20 2014 1:05PM | Successfully Login | 173.174.32.52
nina | Wilson, Nina | Nov 20 2014 12:54PM | Successfully Login | 107.15.170.203
Guest | Guest, Guest | Nov 20 2014 12:41PM | Successfully Login | 38.88.216.10
Guest | Guest, Guest | Nov 20 2014 12:41PM | Unknown Password | 38.88.216.10
Guest | Guest, Guest | Nov 20 2014 12:41PM | Successfully Login | 38.88.216.10
Guest | Guest, Guest | Nov 20 2014 12:41PM | Successfully Login | 38.88.216.10
JenR | Richardson, Jennifer | Nov 20 2014 11:52AM | Successfully Login | 71.177.194.159
jane1 | One, Jane | Nov 20 2014 11:42AM | Successfully Login | 75.148.100.238
Administrator | , Administrator | Nov 20 2014 11:42AM | Successfully Login | 75.148.100.238
janeTjoe | Tjoe, Jane | Nov 20 2014 11:41AM | Successfully Login | 75.148.100.238
administrator | , Administrator | Nov 20 2014 11:41AM | Successfully Login | 75.148.100.238
administrator | , Administrator | Nov 20 2014 11:41AM | Unknown Password and User Name | 75.148.100.238
nina | Wilson, Nina | Nov 20 2014 11:40AM | Successfully Login | 107.15.170.203

Slot History

(Administration>Administration>Slot History)

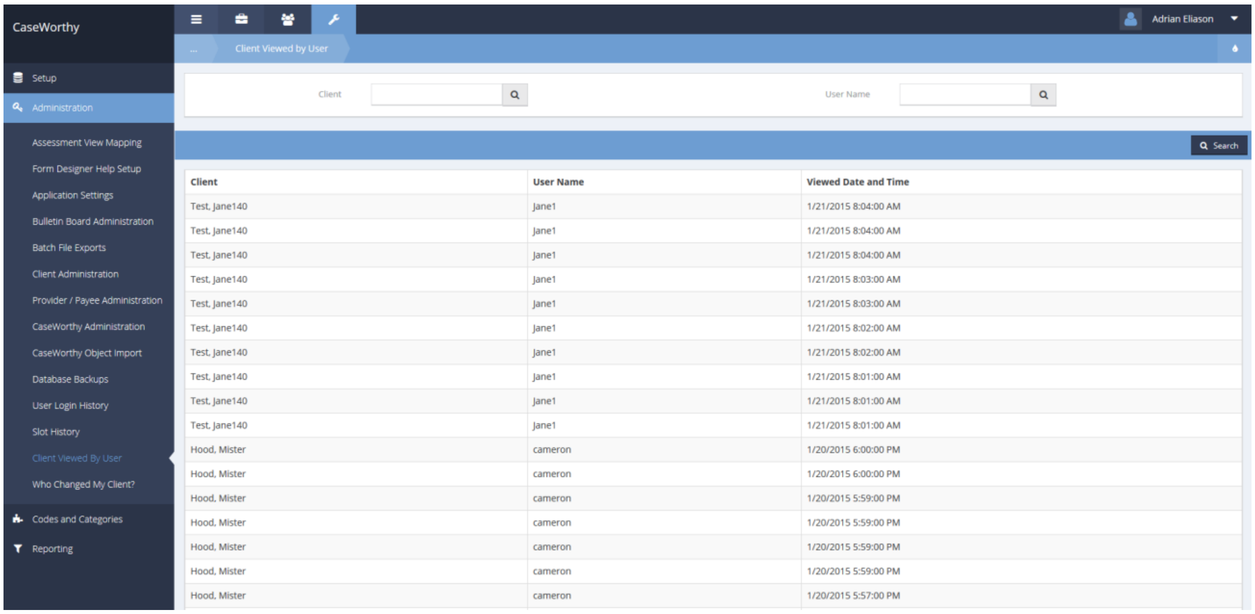
The slot history area provides easy access to all slots set up within CaseWorthy™. System administrators can view the list of slots and see their assigned resource, current status, and if they have a special designation (such as disabled, medical, veteran, etc.). Additionally, by clicking on the action gear next to the desired slot, system administrators can quickly and easily edit the set up.



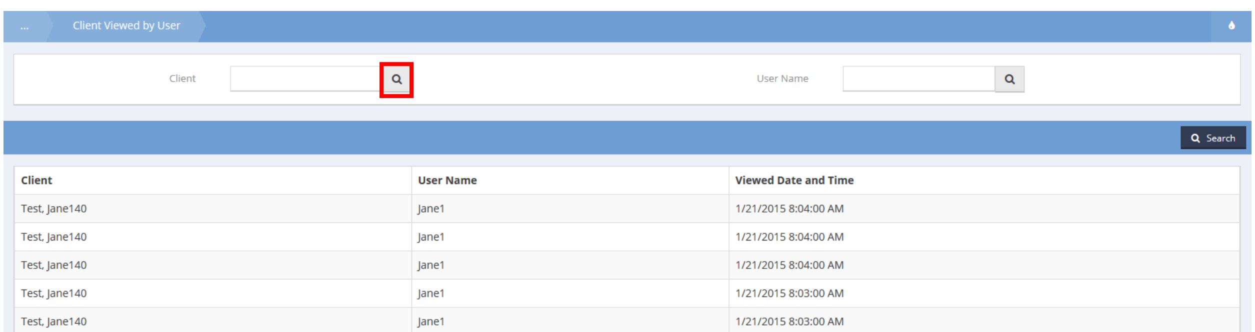
Client Viewed By User

(Administration>Administration>Client Viewed By User)

The Client Viewed By User form displays a spreadsheet of clients viewed by user with a date and time. Parameters may be set to both a specific client and a user.

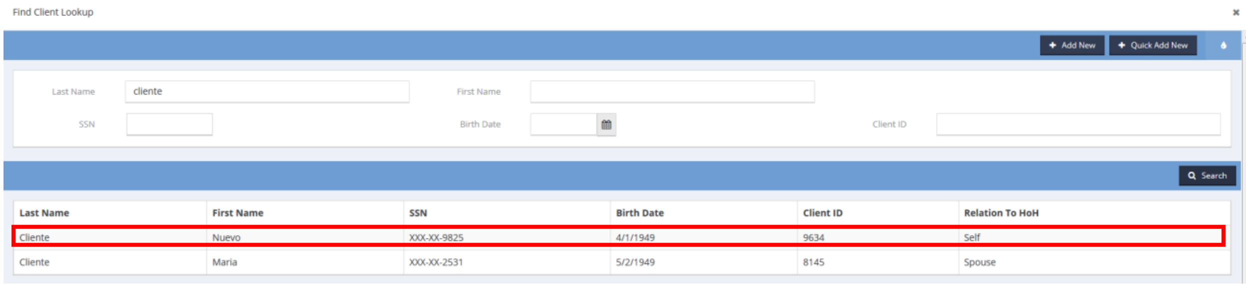


To select a client, click the magnifying glass  icon for client.

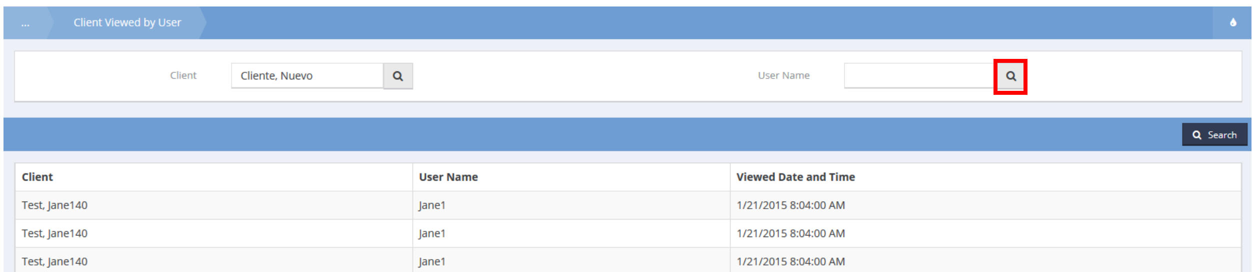


The Find Client Lookup form displays. Enter any known client info and click the search button.

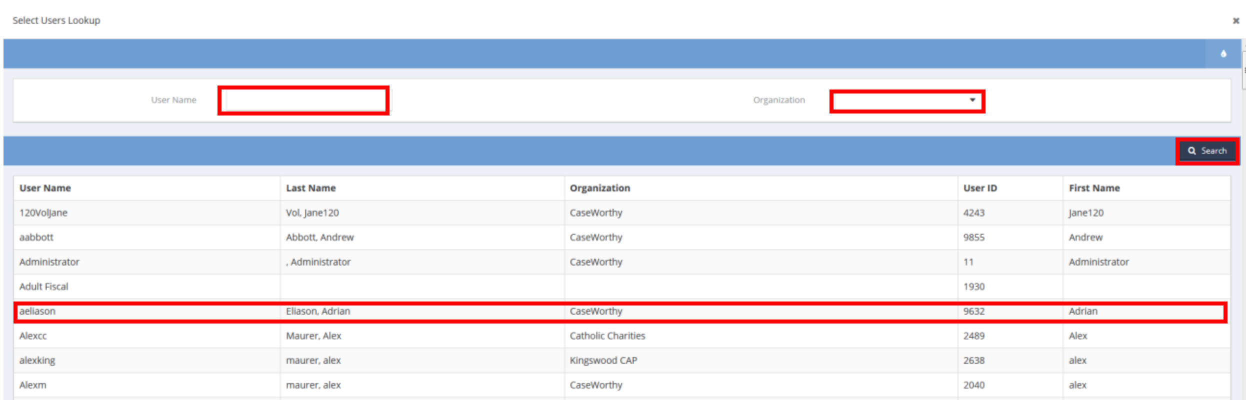
Matching clients display in the space below. Click the desired client.



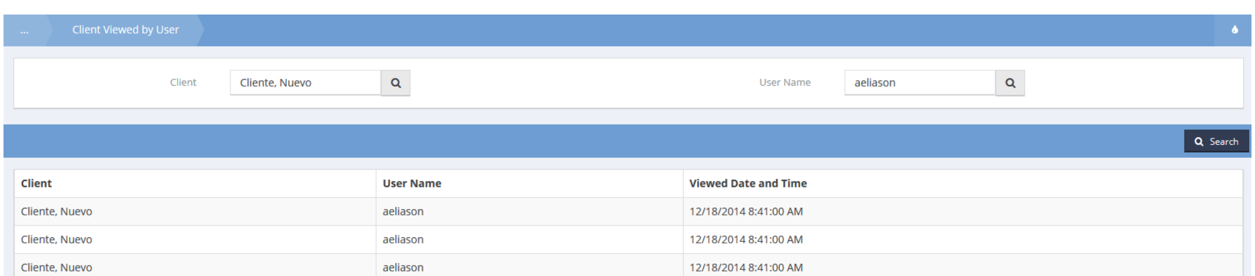
The Client Viewed By User form displays. To select a user, click the magnifying glass icon for user name.



The Select Users Lookup form displays. To narrow the list of users, enter a user name or select an organization from the drop-down list and click Search. Click on the desired user.



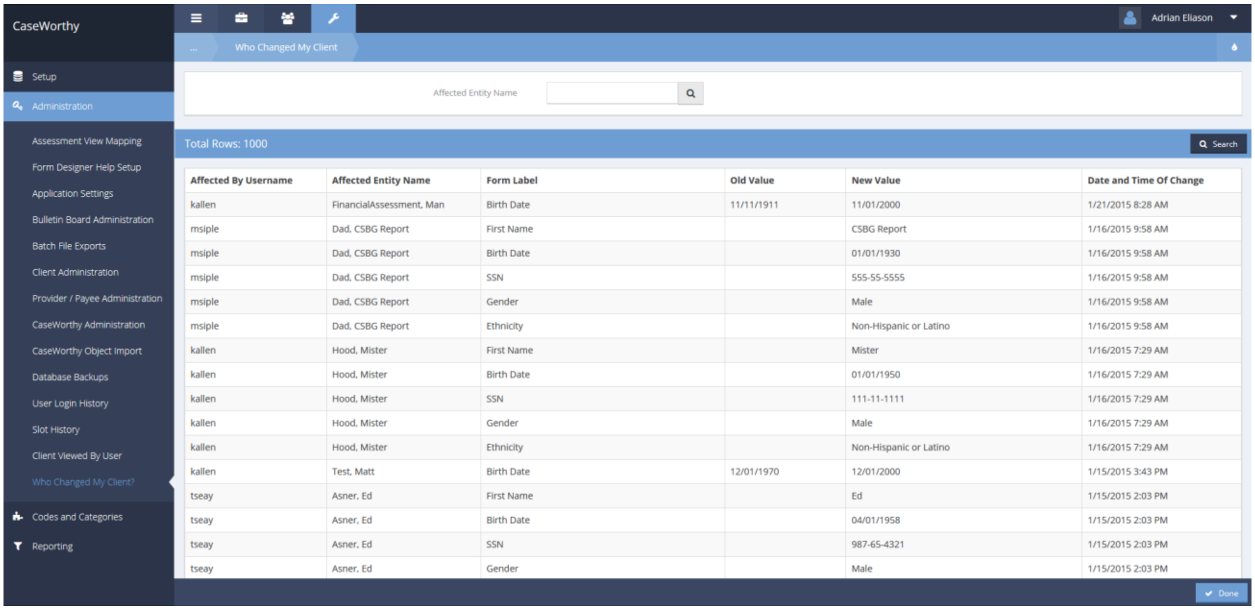
The Client Viewed By User form displays. Click the Search button. Results display in the space below.



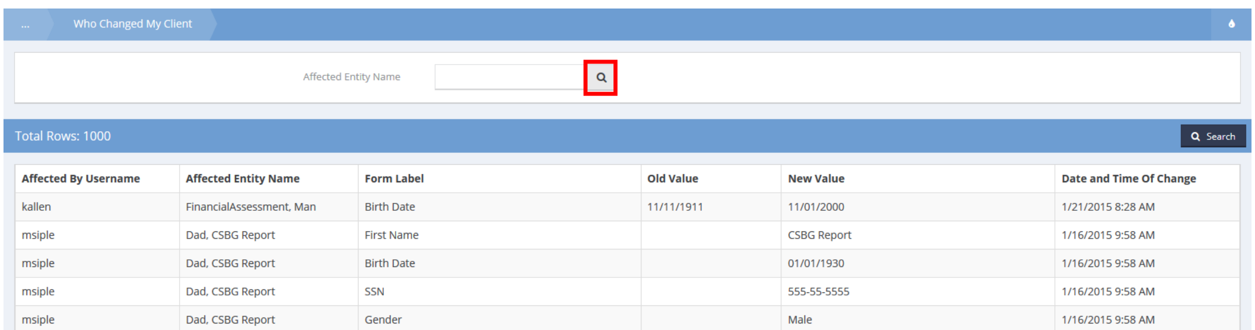
Who Changed My Client?

(Administration>Administration>Who Changed My Client?)

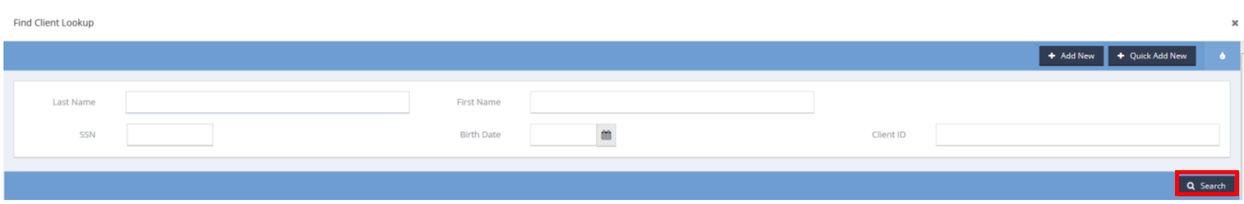
The Who Changed My Client? form is a simple way to view any changes made to a client. It specifically details any new and changed values to any form label for a client.



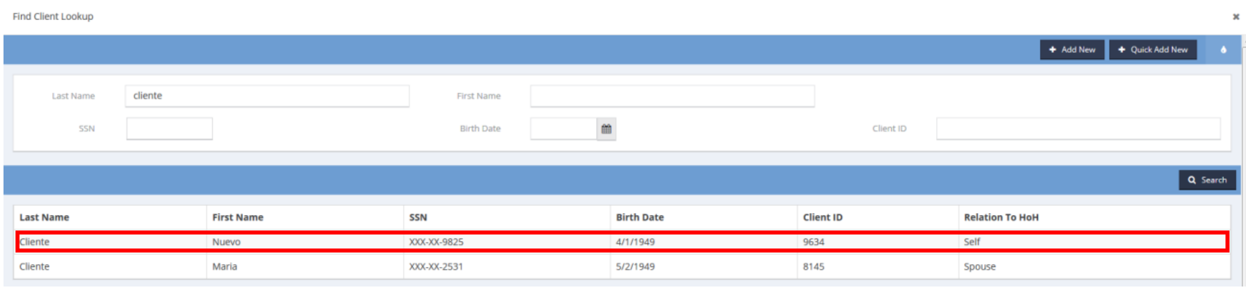
To view changes to a specific client, click the magnifying glass icon.



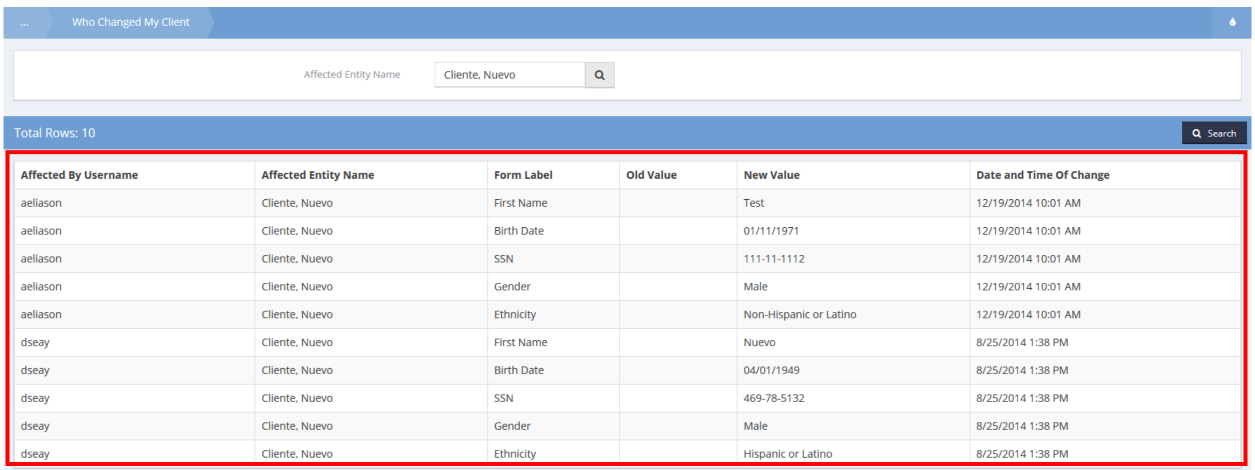
The Find Client Lookup form displays. Enter any known client info and click the Search button.



Matching clients display in the space below. Click the desired client.



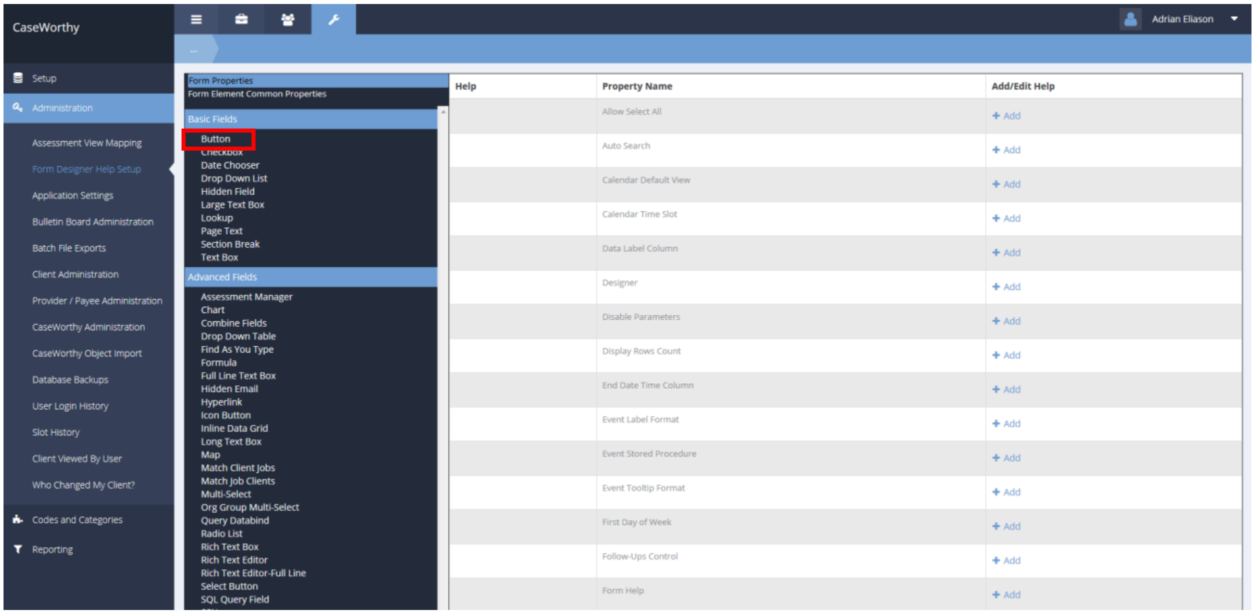
The Who Changed My Client form displays. Click the search button and changes made to the client are displayed in the space below.



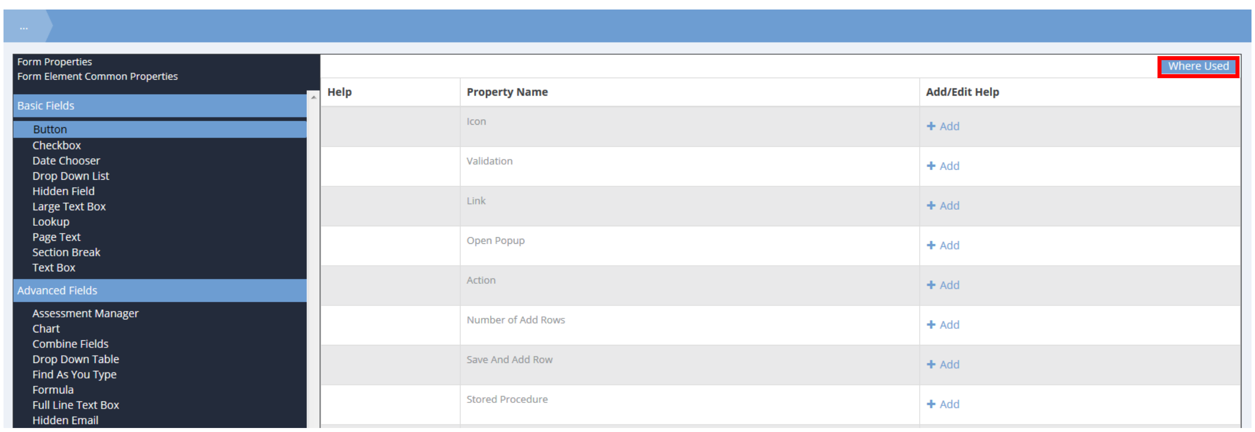
Form Designer Help Setup

(Administration>Administration>Form Designer Help Setup)

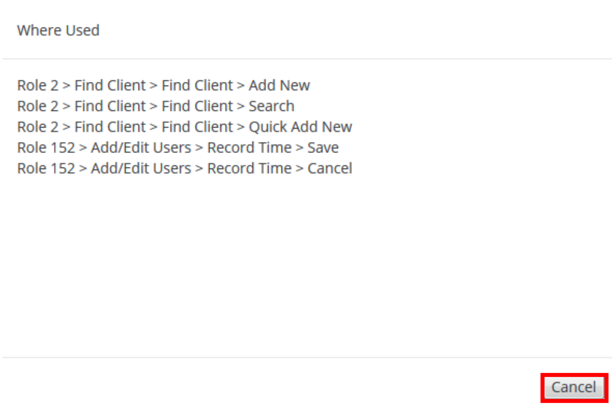
The Form Designer Help Setup form allows for the setting up of help fields on forms. The left column is used to select a field.



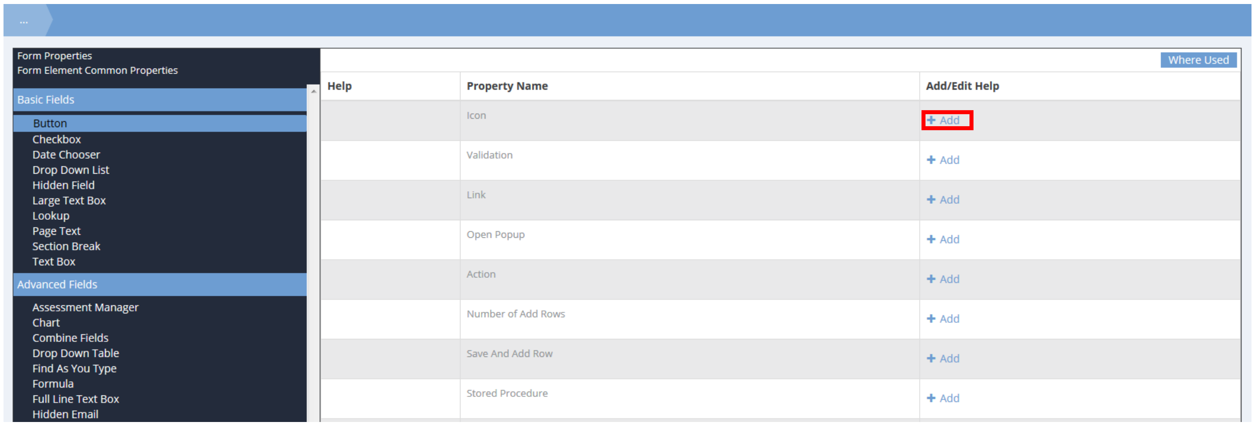
Upon selecting a field, the table changes to the selected field. Clicking the Where Used button displays a new window with a list of all uses of the selected help field.



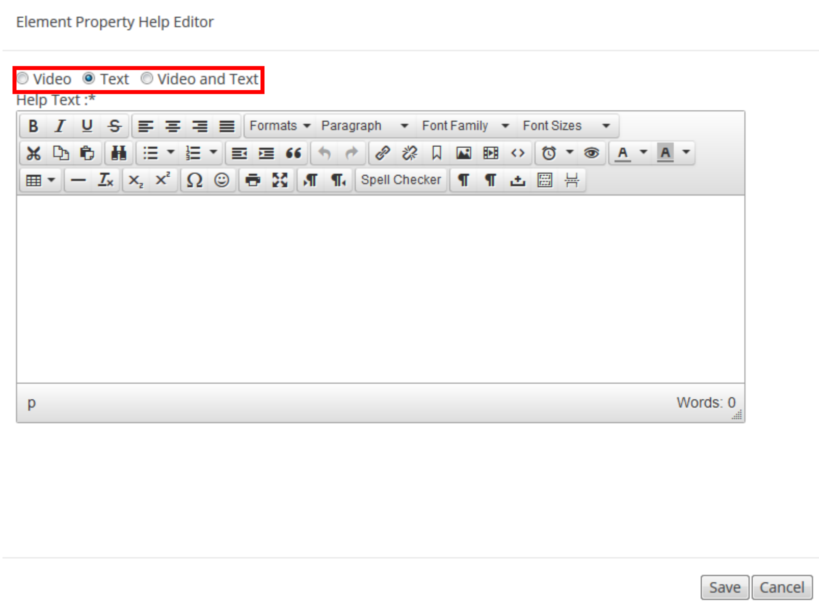
Click Cancel to return to the Form Designer Help Setup form.



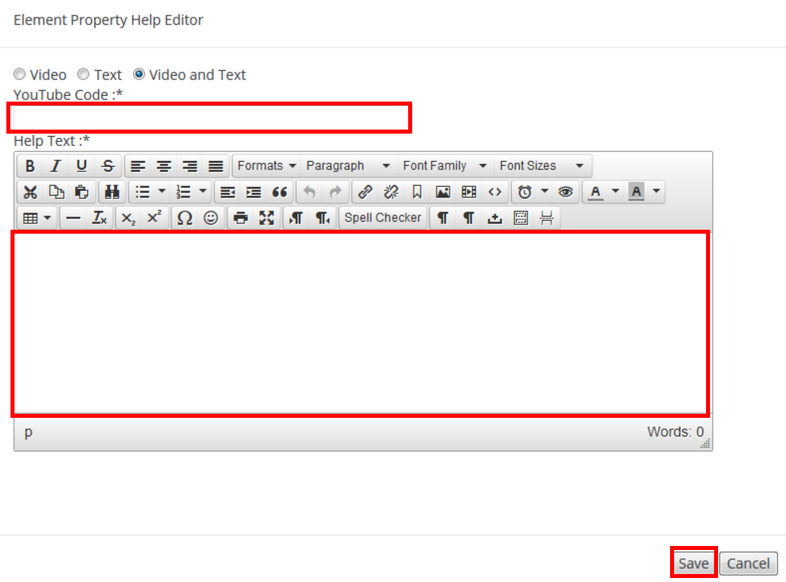
Click + Add to add a new help dialog. The Element Property Help Editor form displays.



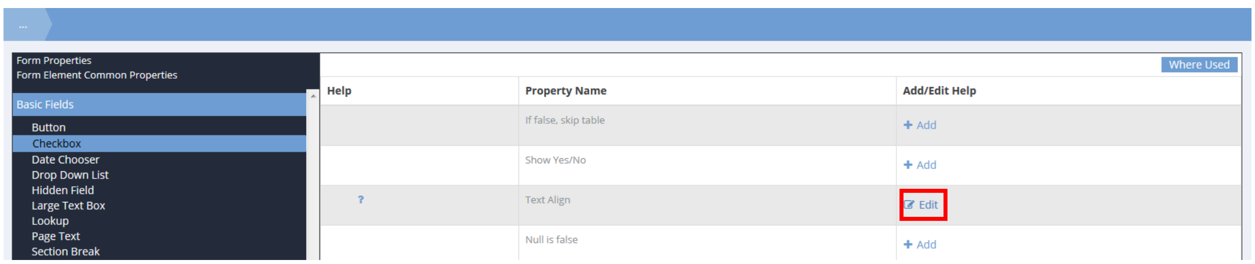
Use the radio buttons to select Video, Text, or Video and Text.



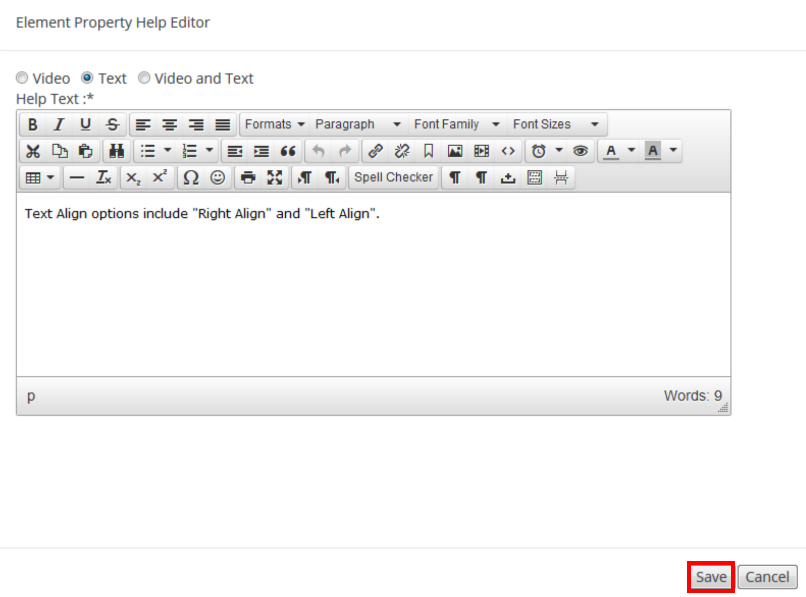
To attach a YouTube video, insert the embed code from a video into the YouTube Code form. Enter the desired help text into the Help Text form. Click Save when done. The Form Designer Help Setup form displays.



Editing is essentially the same. First, click the Edit button. The Element Property Help Editor displays.



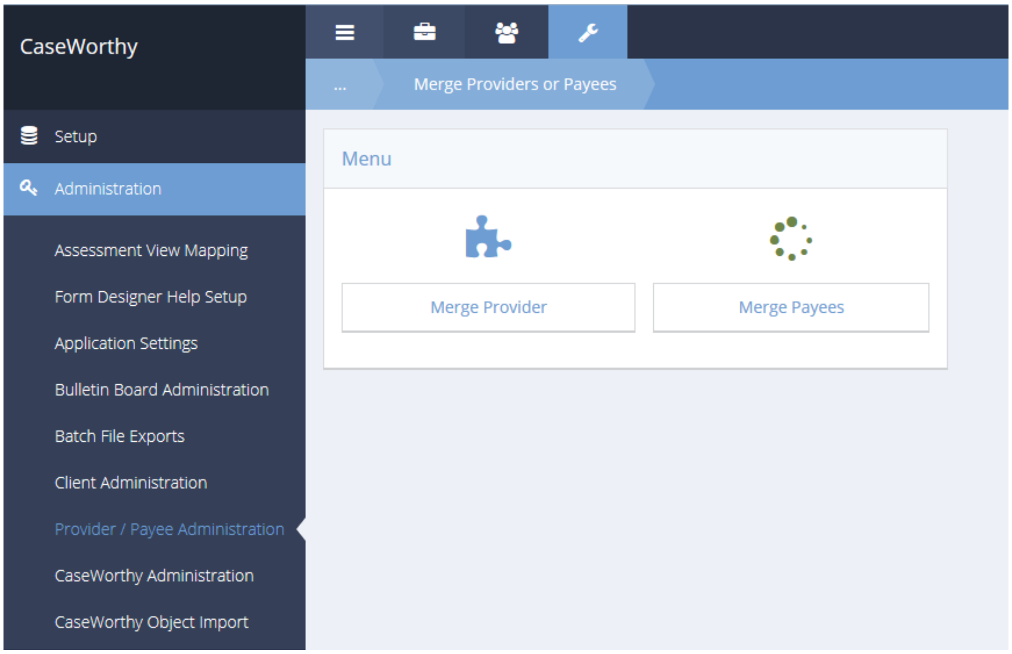
Make any desired changes and click Save when done.



Provider / Payee Administration

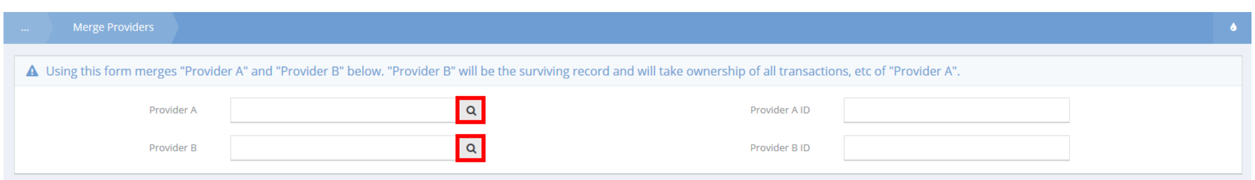
(Administration>Administration>Provider / Payee Administration)

The Provider / Payee Administration dashboard gives access to forms used to merge providers and payees.

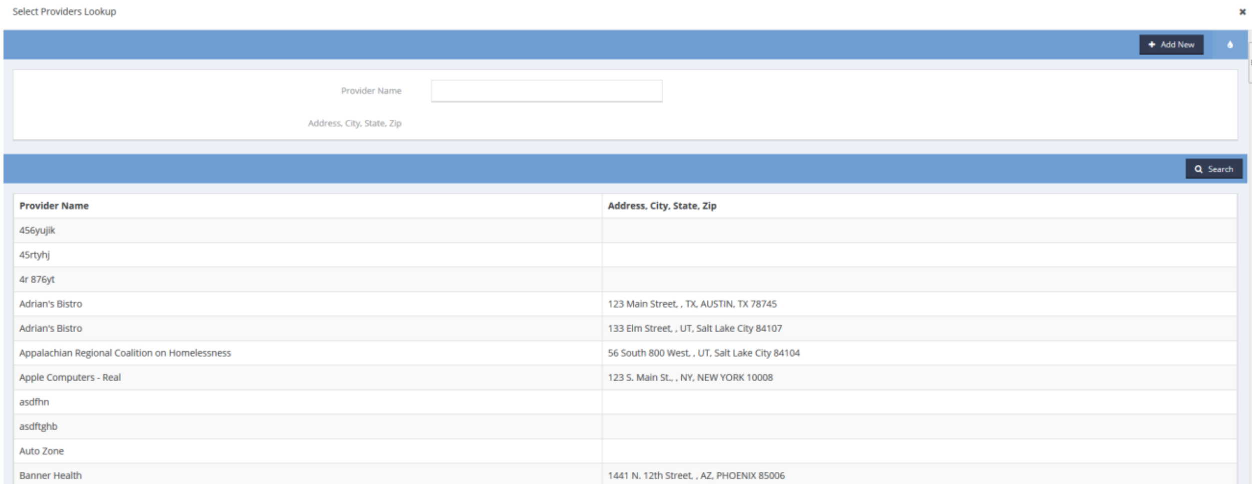


Merge Provider

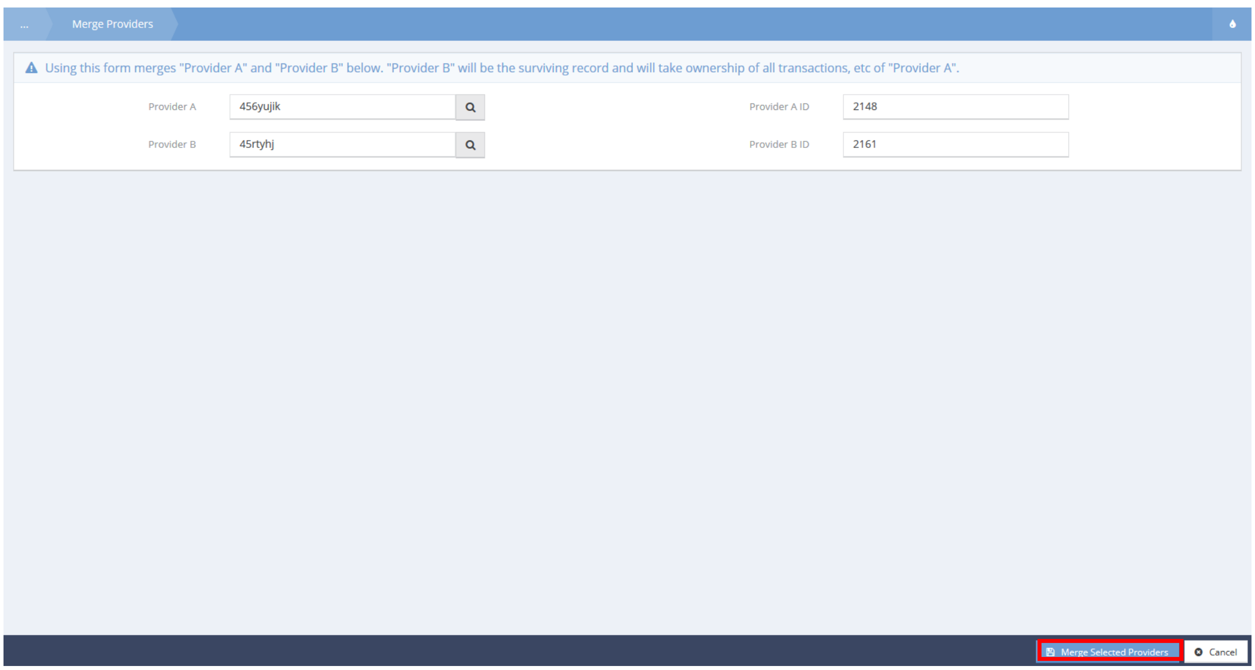
Click the magnifying glass icon.



The Select Providers Lookup form displays. Click a provider name in the list to select. The Merge Providers from displays.

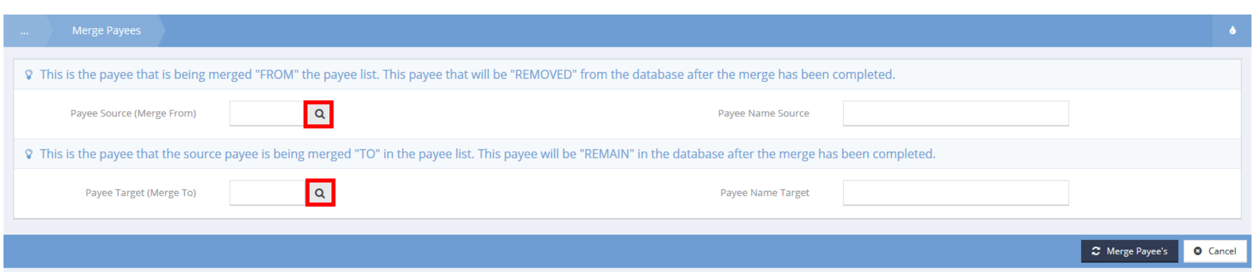


Once the desired providers have been selected, click the Merge Selected Providers button.

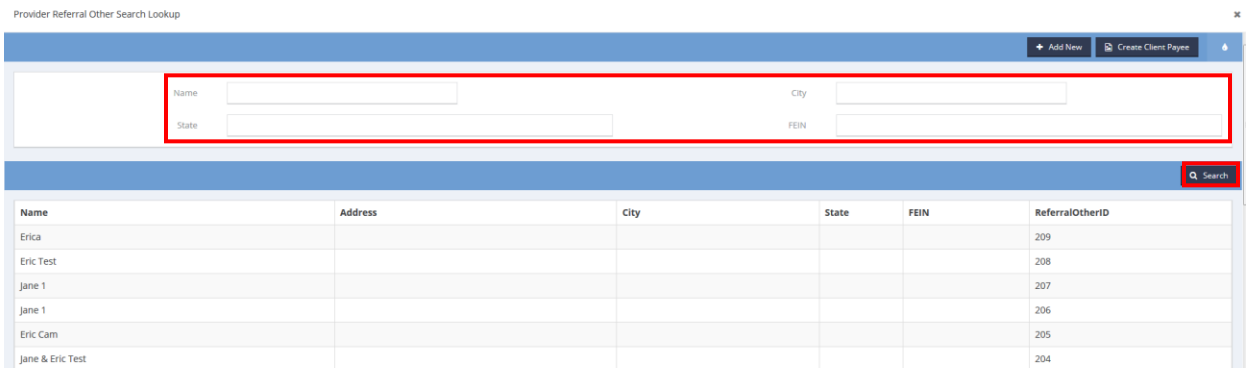


Merge Payees

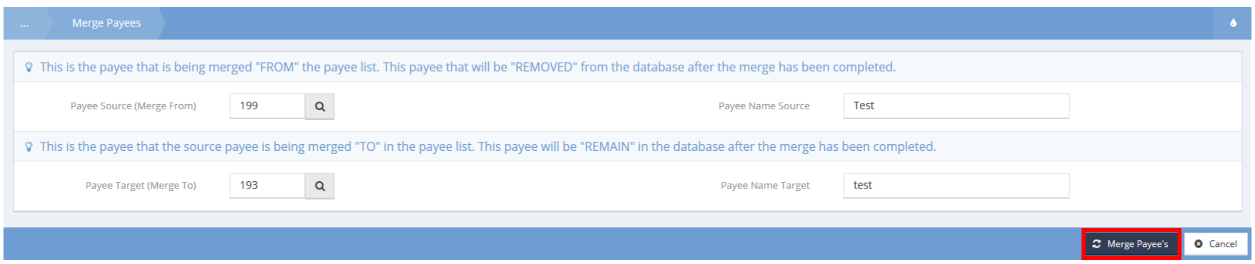
Click the magnifying glass icon. The Provider Referral Other Search Lookup form displays.



Enter any known info and click Search to locate a specific payee. Click on a name to select. The Merge Payees form displays.



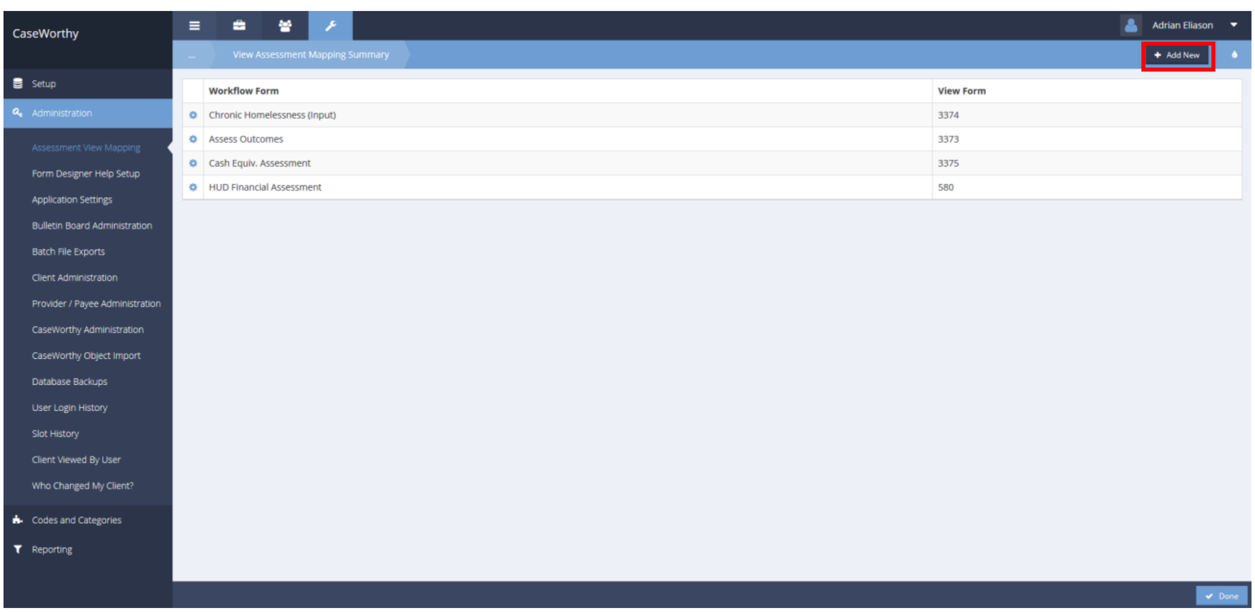
Once the desired payees have been selected, click the Merge Payee's button.



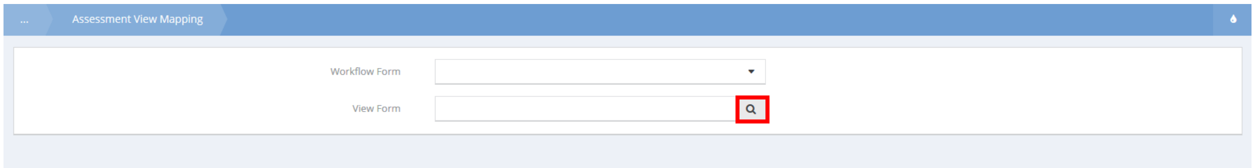
Assessment View Mapping

(Administration>Administration>Assessment View Mapping)

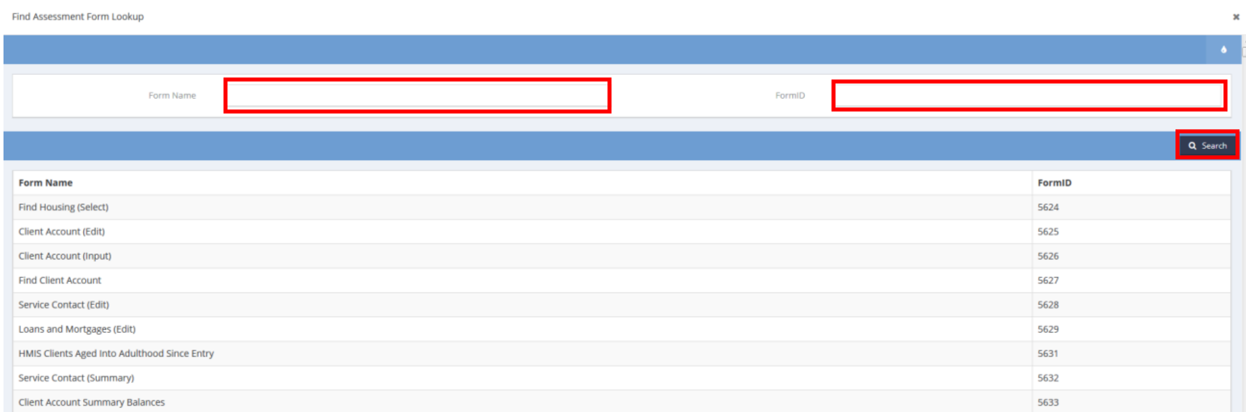
To complete a new mapping, click the Add New button. The Assessment View Mapping form displays.



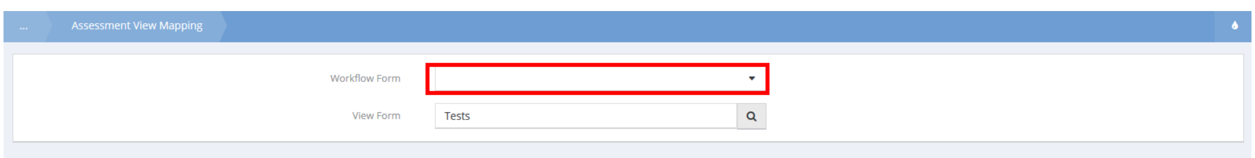
Click the magnifying glass icon for view form. The Find Assessment Form Lookup form displays.



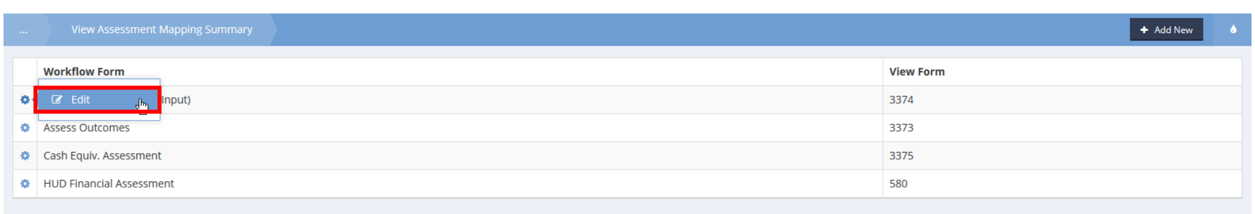
Enter a name or ID and click Search to filter the list of forms. Click a form to select it. The Assessment View Mapping form displays.



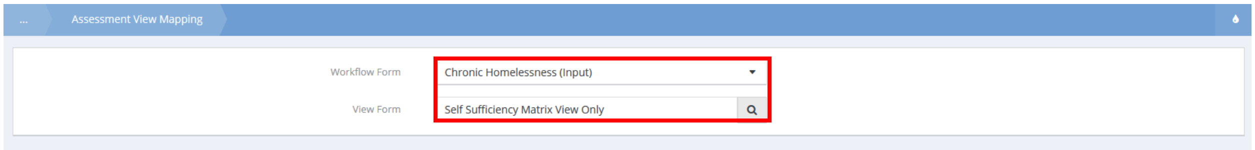
Select a workflow form from the drop-down list. Click Save. The View Assessment Mapping Summary form displays.



To edit an existing workflow form, click the action gear and click Edit. The Assessment View Mapping form displays.



Select the desired workflow form and view form and click Save.

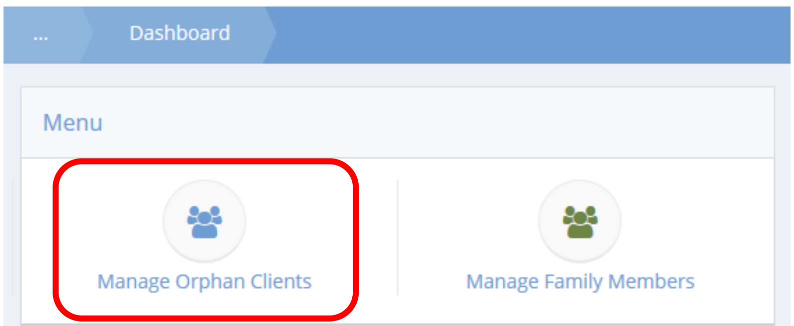


Family Administration

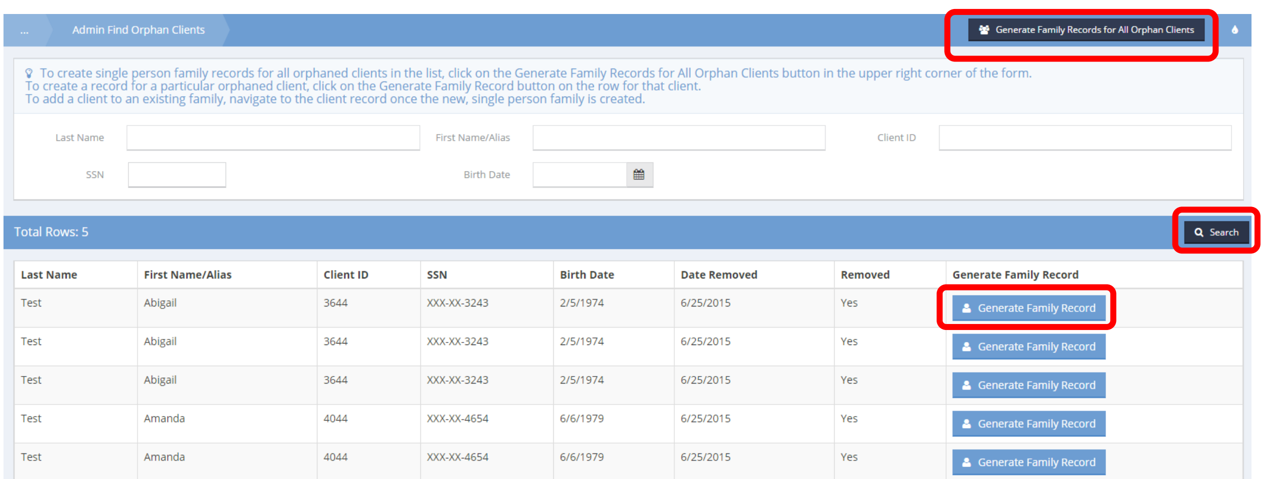
Manage Family Members

(Administration>Administration>Family Administration)

Manage Orphan Clients



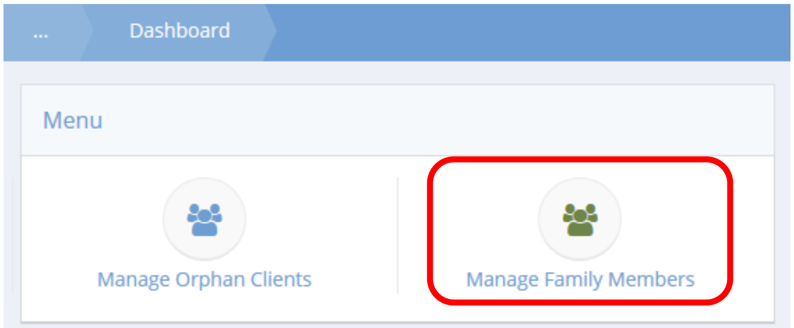
Click the icon for Manage Orphan Clients. The Admin Find Orphan Clients form displays.



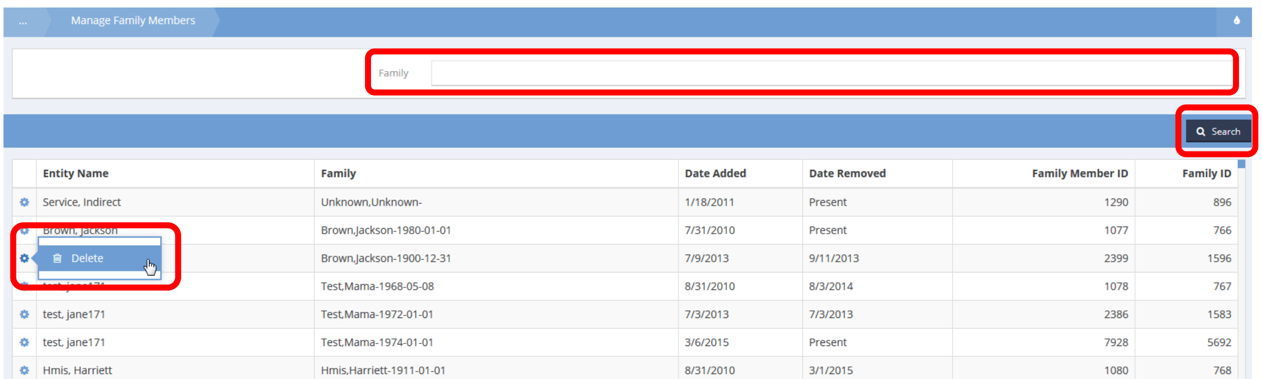
Last Name	First Name/Alias	Client ID	SSN	Birth Date	Date Removed	Removed	Generate Family Record
Test	Abigail	3644	XXX-XX-3243	2/5/1974	6/25/2015	Yes	Generate Family Record
Test	Abigail	3644	XXX-XX-3243	2/5/1974	6/25/2015	Yes	Generate Family Record
Test	Abigail	3644	XXX-XX-3243	2/5/1974	6/25/2015	Yes	Generate Family Record
Test	Amanda	4044	XXX-XX-4654	6/6/1979	6/25/2015	Yes	Generate Family Record
Test	Amanda	4044	XXX-XX-4654	6/6/1979	6/25/2015	Yes	Generate Family Record

Use the parameter fields and **Search** button to filter the list of clients. To generate a family record for a client, click the **Generate Family Record** button. To generate records for all orphaned clients, click the **Generate Family Records for All Orphan Clients** button.

Manage Family Members



Click the icon for Manage Family Members. The Manage Family Members form displays.



To filter by a family name, enter the name in the Family search bar and click the Search button. To delete a family member, click the action gear icon and click Delete.

Codes and Categories Menu

The Codes and Categories area is designed to allow for customizations within the system without having to create custom forms or lists. There are seven primary categories, most of which include multiple sub-categories.

Financials/Documents

(Administration>Codes and Categories>Financials/Documents)

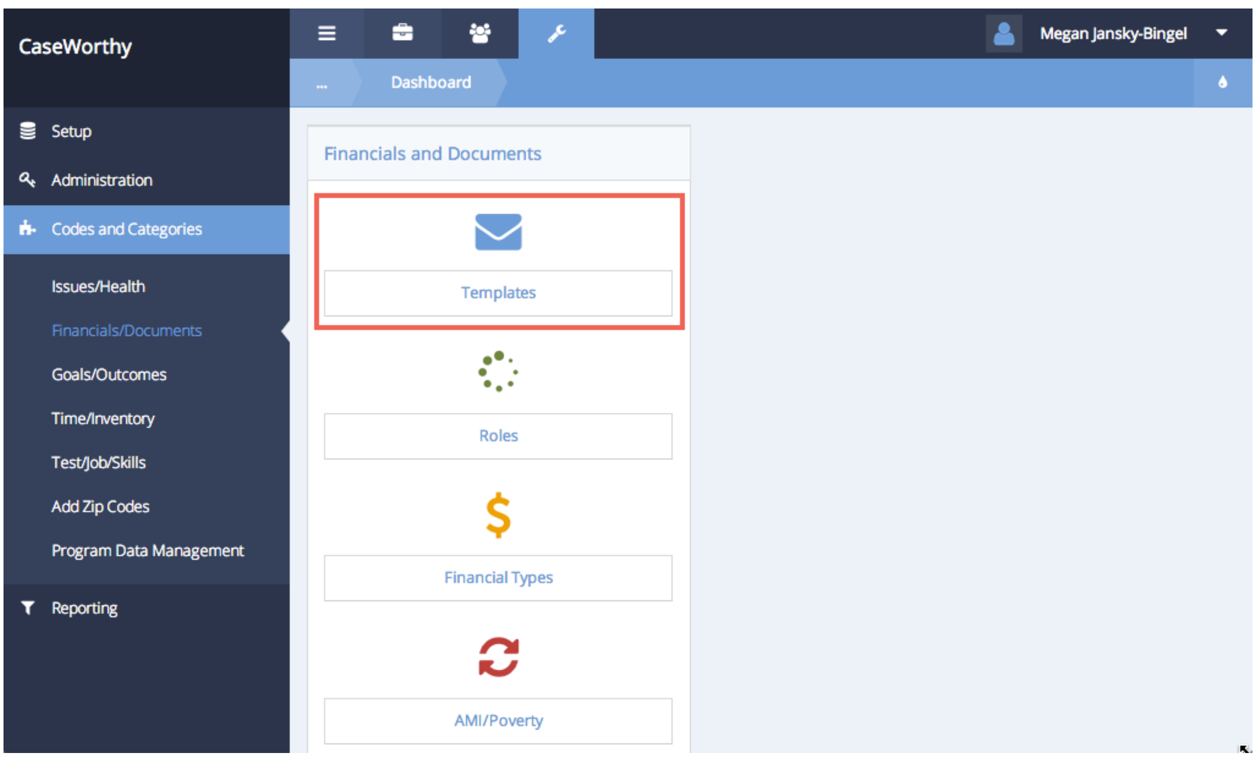
The Financials and Documents category area includes set up for Case Note Templates, Financial Types, Tax Table, Documents Type, Roles, AMI/Poverty, Image Type and Fiscal Calendars.

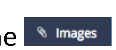
Templates

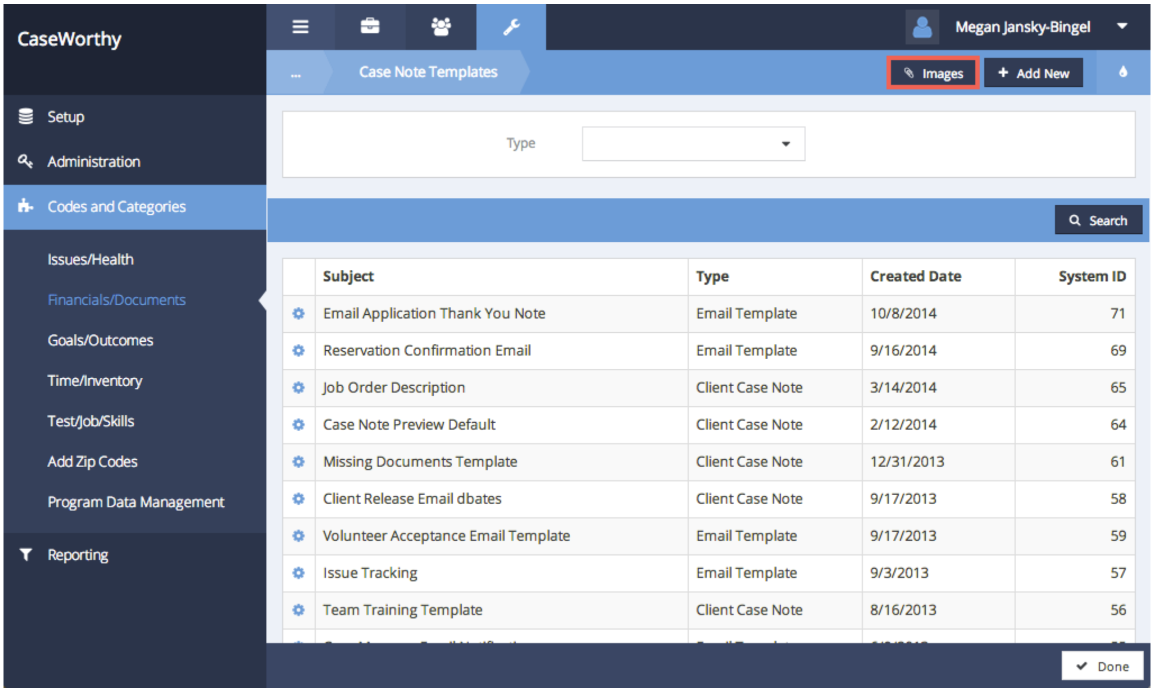
(Administration>Codes and Categories>Financials/Documents>Templates)

This area houses the set up for case note and email templates. Templates allow for required and/or specific formats to be applied to the case note or email. Additionally, parameters can be carried in which can populate data fields such as client name, case manager name, DOB, etc.

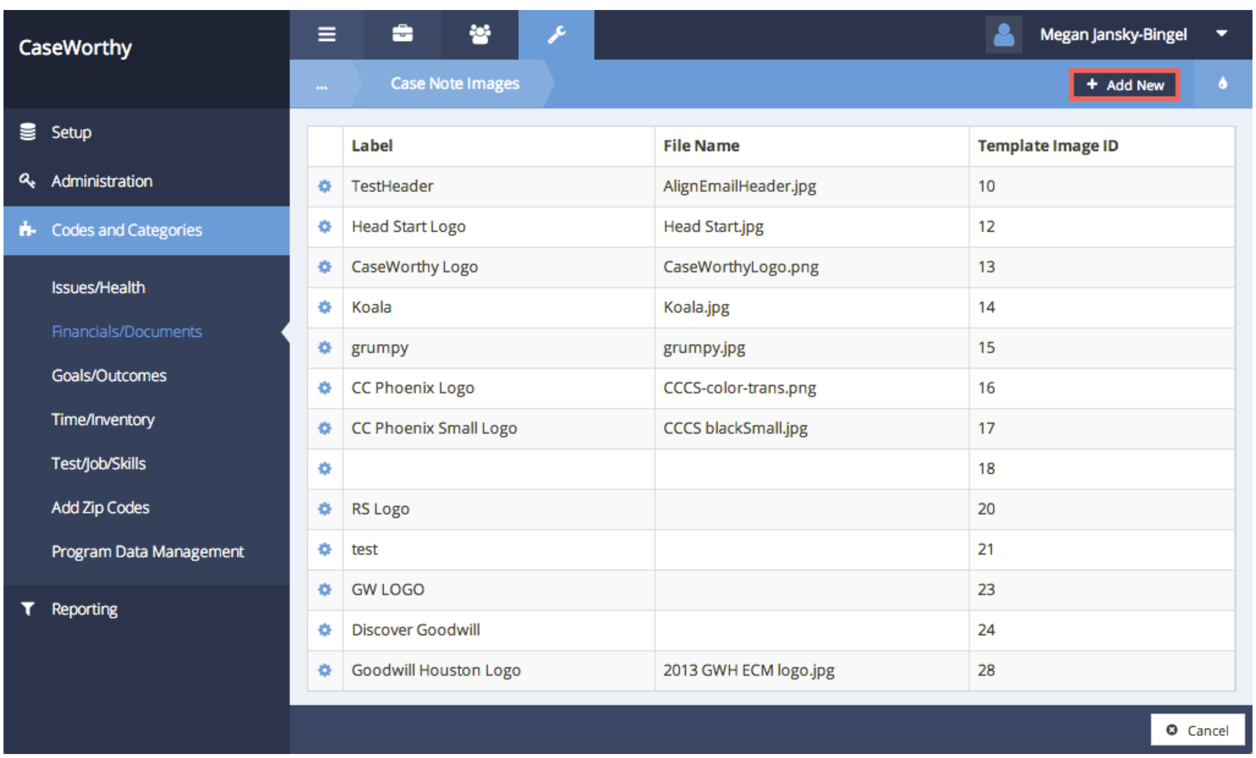
To create a new template, click on the "Templates" icon on the Financials/Documents dashboard.



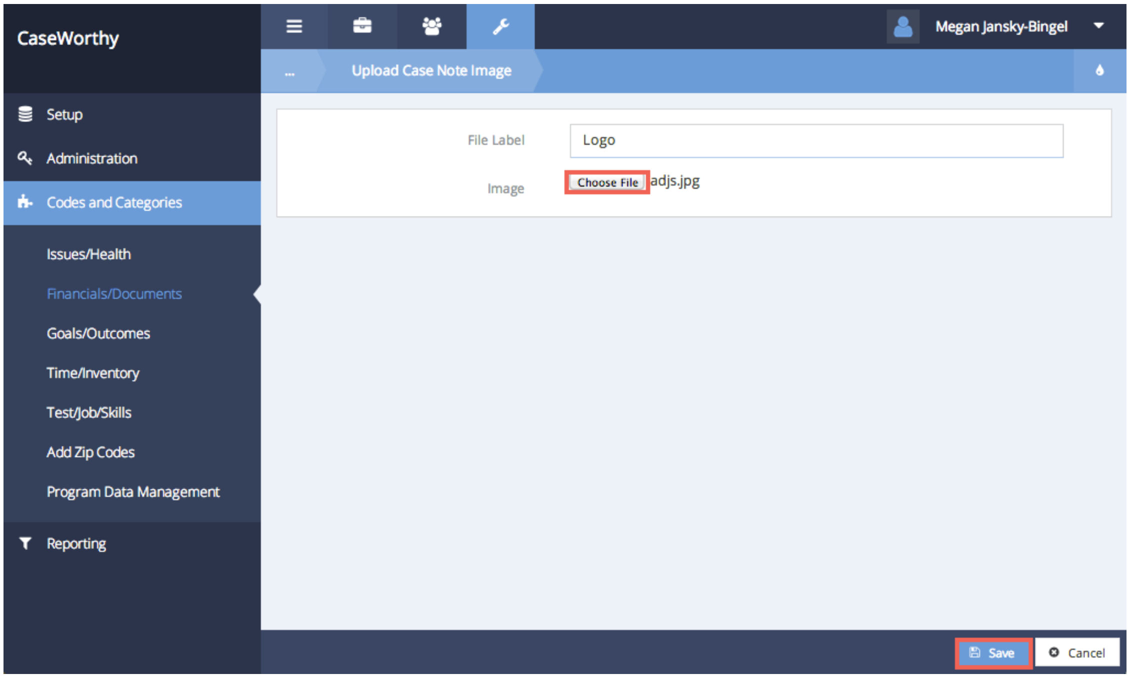
To upload images and/or logos to embed in templates, click the  button.



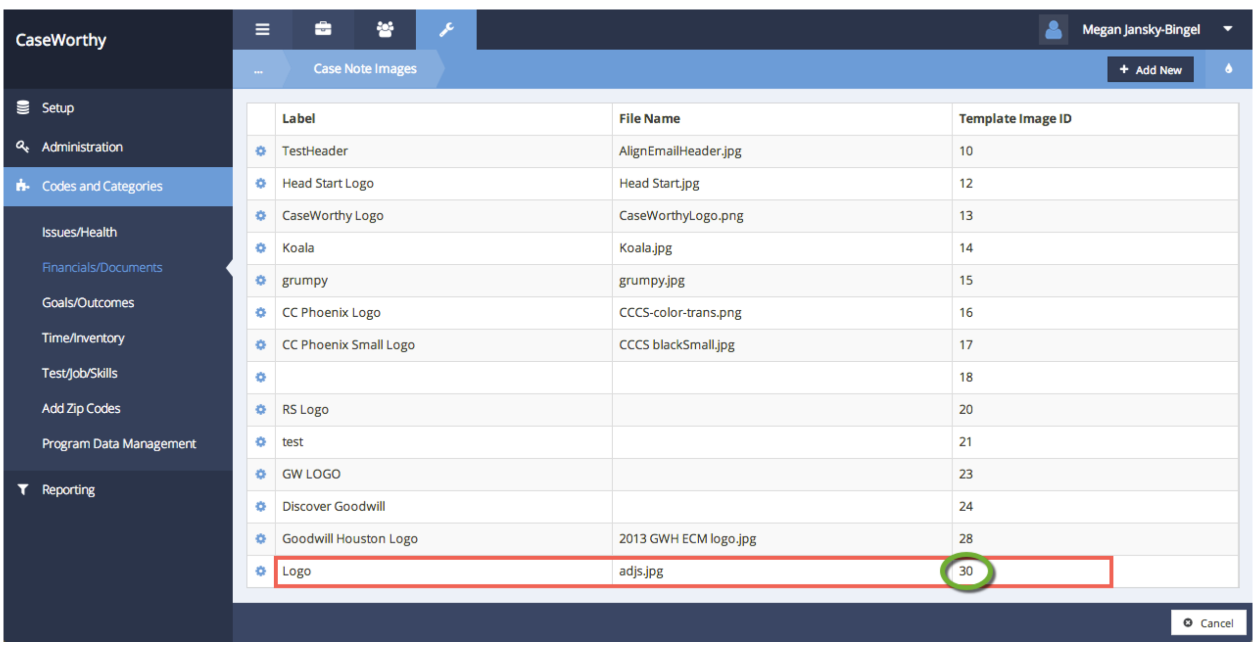
From the Case Note Image summary form, click the Add New button.



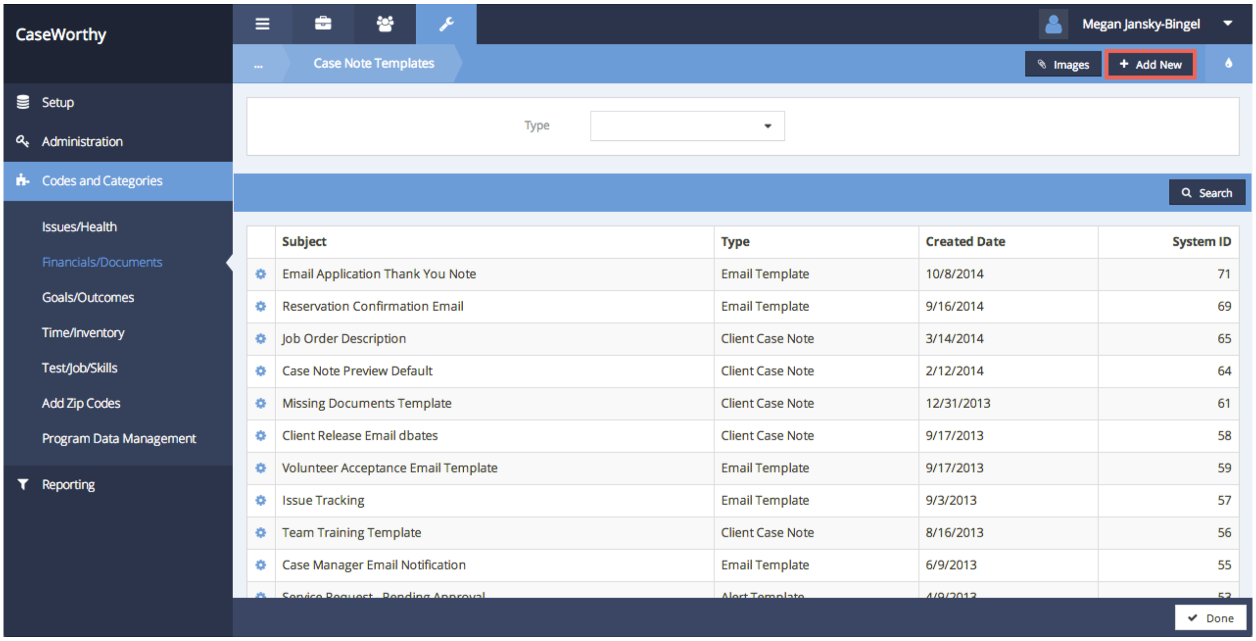
On the Upload Case Note Image form, enter a name for the image. Use the “Browse” button to select the image to upload. Then click the Save button.



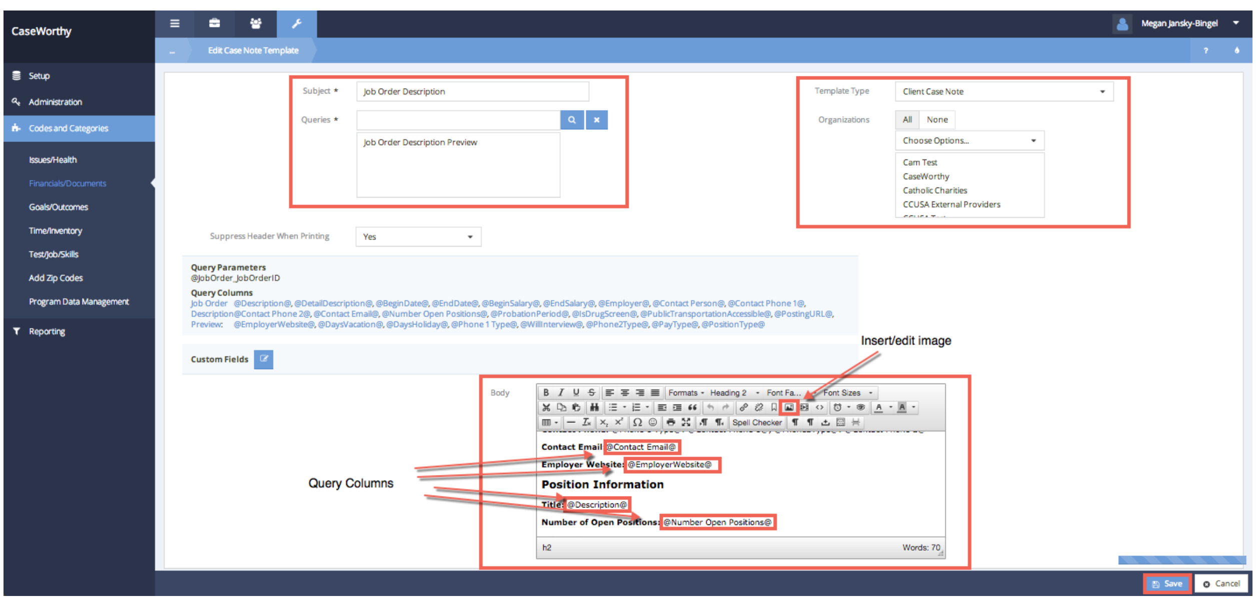
Back on the Case Note Image summary form, make note of the Template Image ID and click the Cancel button.



Upon returning to the Case Note Template form, click the Add New button.



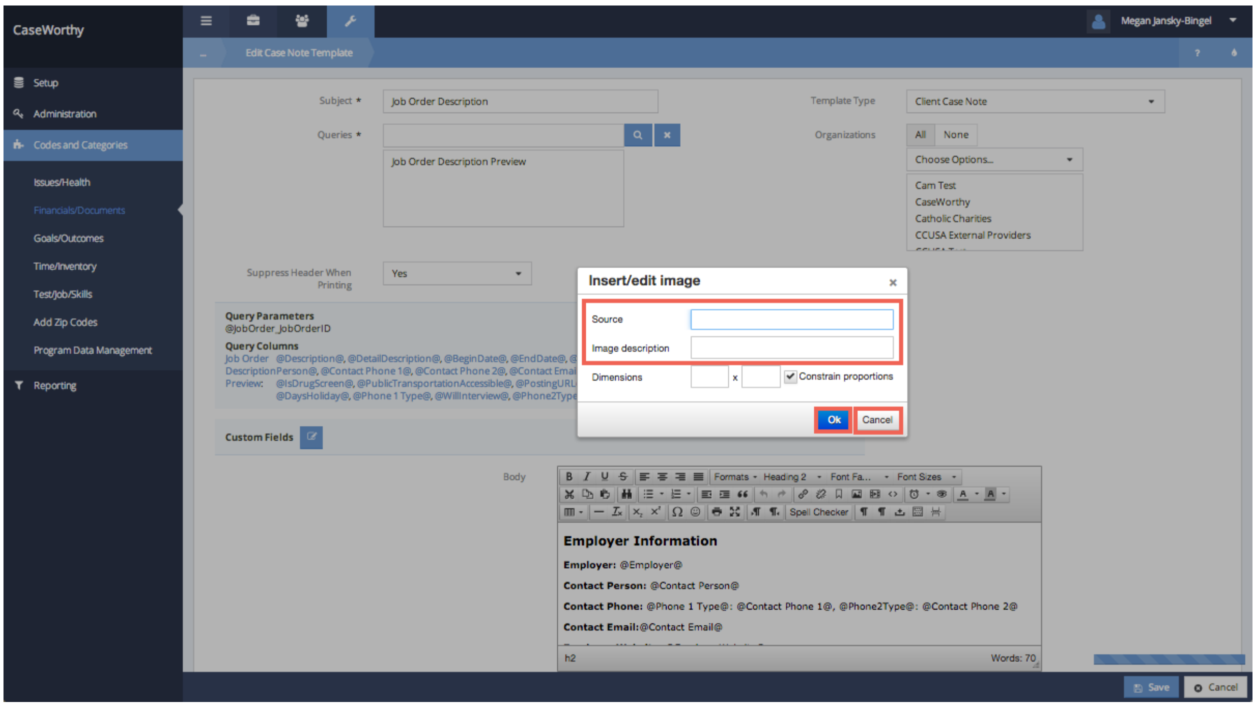
On the Edit Case Note Template form, enter the name for the template. Select the template type and the organizations that should have access to the template. Use the Queries field look up icon to find and select the desired query or queries to use to parse default data (such as client data, like name, DOB). To enter the text of the template; either manually copy a file or document and paste it in or type the text into the large text area.



To populate the template with default data, simply drag and drop the desired query columns to the appropriate place in the document.

Finally, to add a logo or image to the document, select the Insert/Edit Image icon from the rich text editor menu.

Enter the following URL, where “XX” is the desired Template Image ID (found on the Template Image ID summary form) – ImageDisplay.aspx?TemplateImageID=XX. Type in the description of the image, then click “Insert”

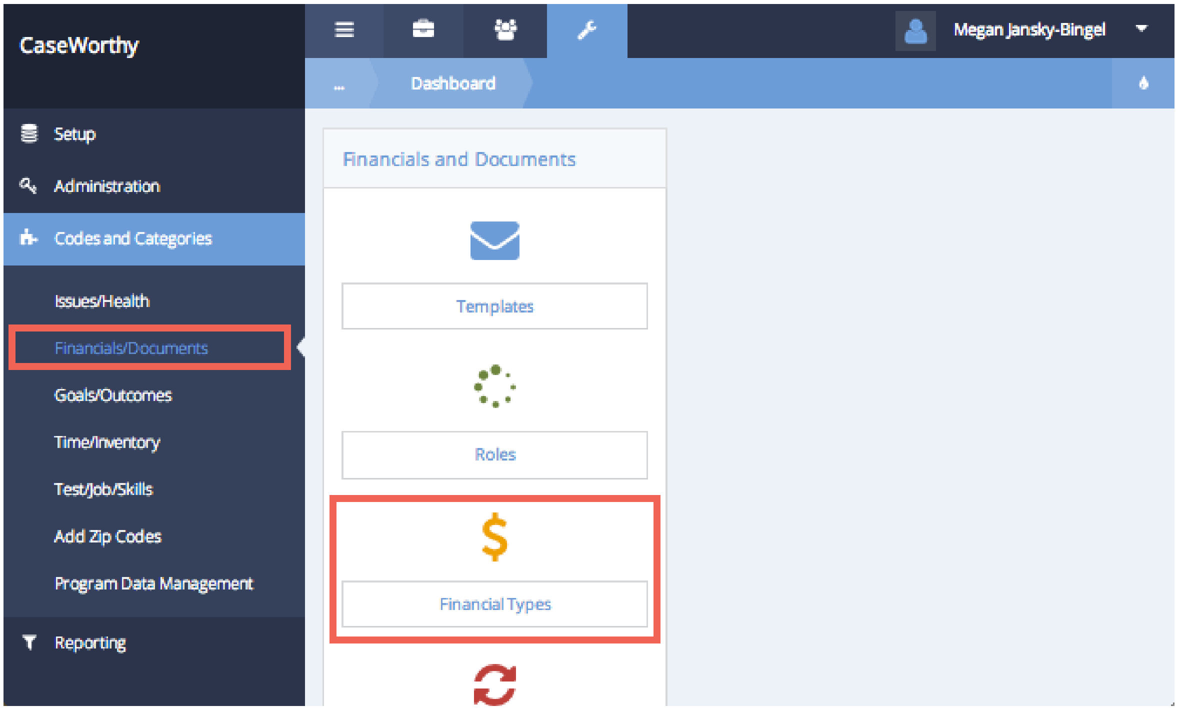


Use the options on the Rich Text Editor menu to center or justify text and/or images, as well as to format and otherwise edit the look and feel of the template.

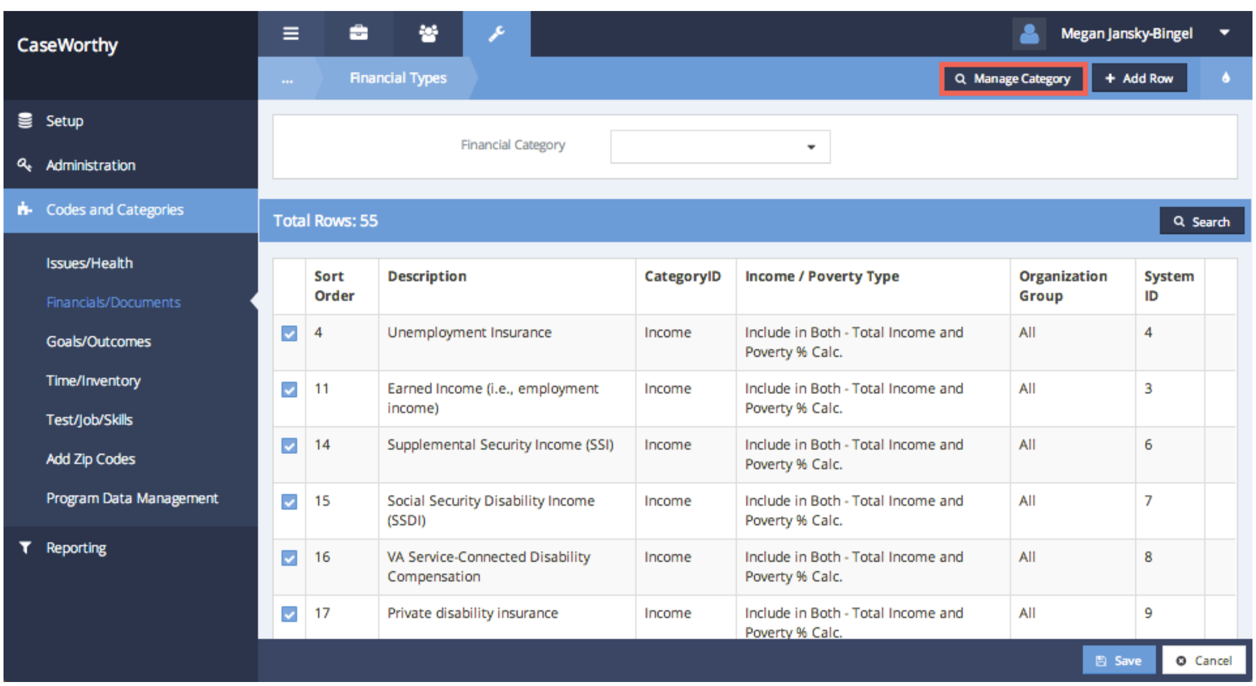
Financial Types

(Administration>Codes and Categories>Financials/Documents>Financial Types)

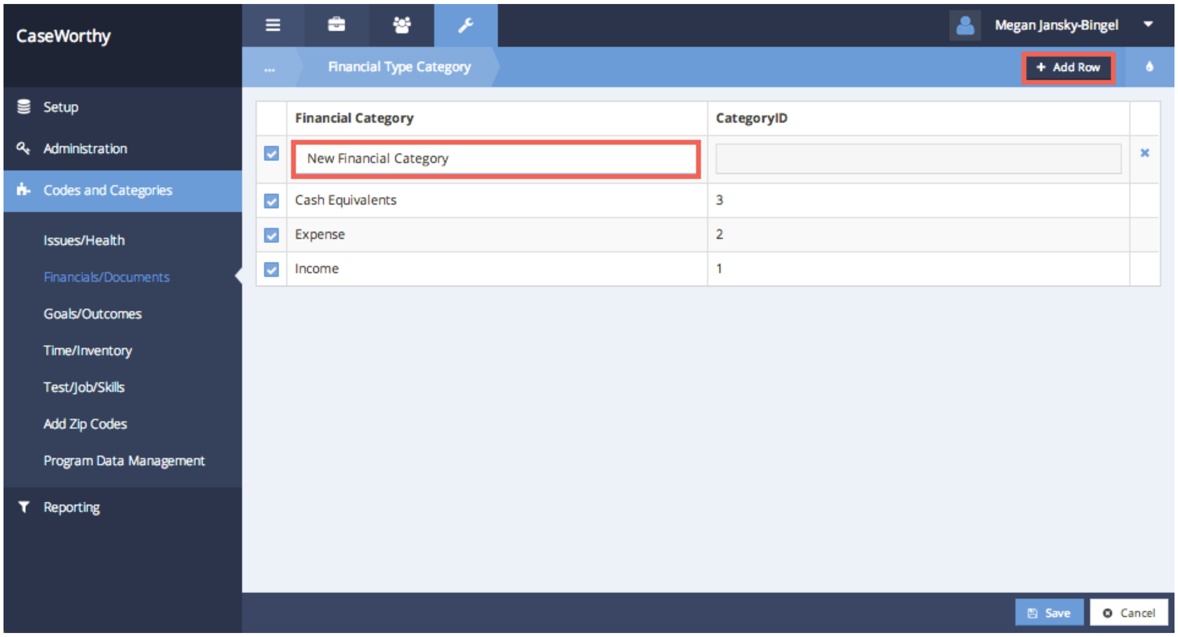
The Financial Types area allows system administrators to customize the options available to users completing financial assessments for clients. To access the Financial Types set up area, select the Financial Types icon on the Financials / Documents dashboard.



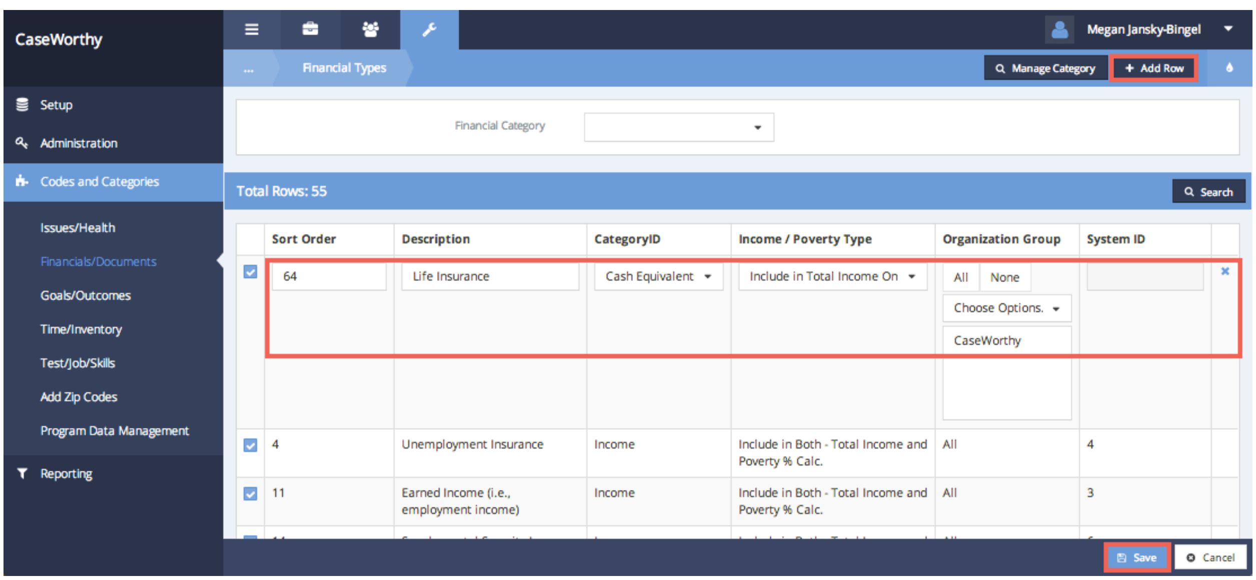
On the Financial Types form, access the financial categories by clicking the Manage Category button on the top right.



To add a financial type category, click the Add Row button. Add a row for each category type to be entered. Enter the category description. Click Save when all desired category types have been entered.

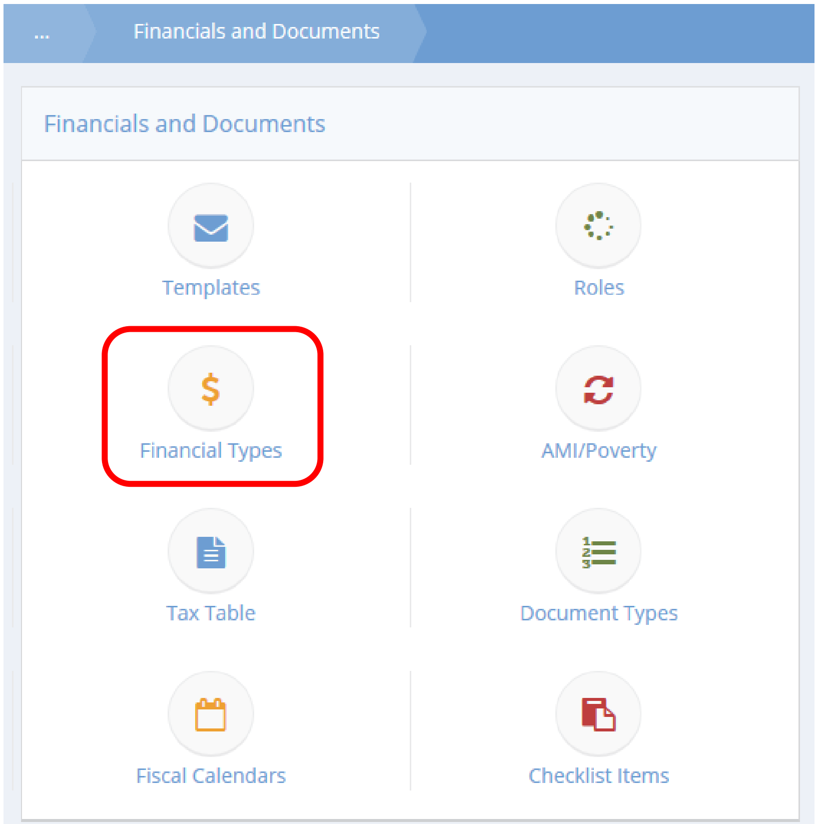


The Financial Types form displays. To add a financial type, click the Add Row button. Add a row for each financial type to be entered. Enter a Sort Order, Description and Category ID. Link the organizations that should have access to the financial type. When all desired financial types have been entered click the Save button.

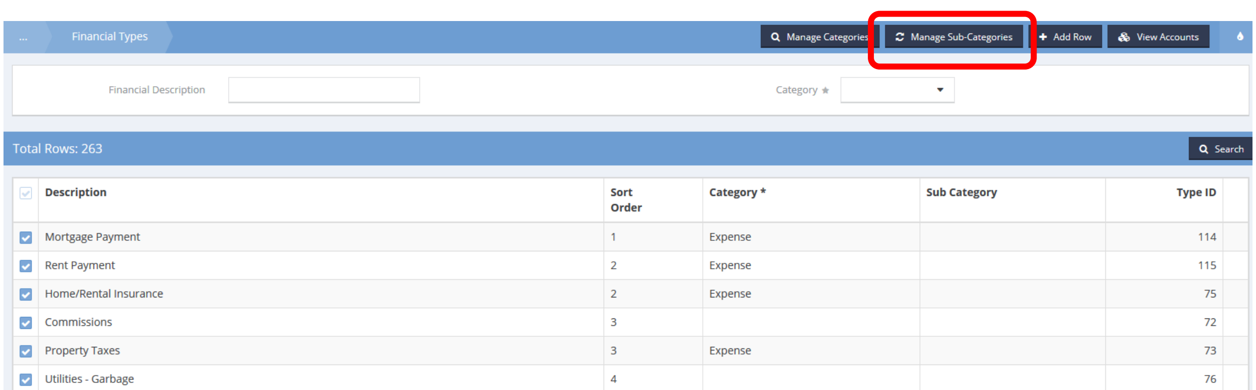


Financial SubCategory Types

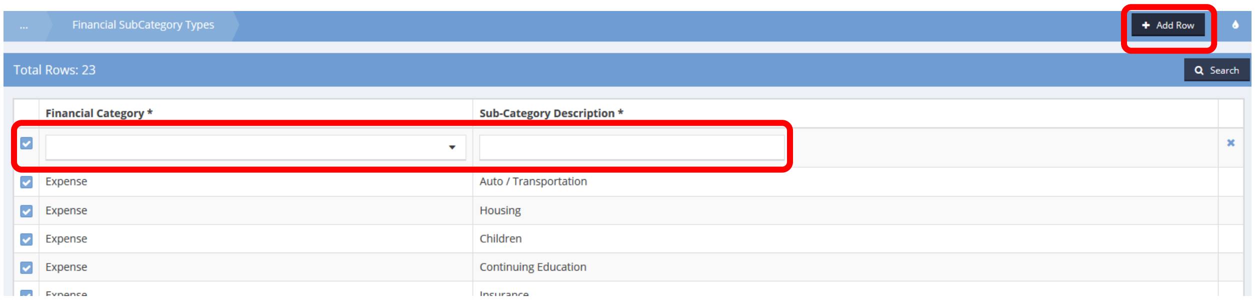
(Administration>Codes and Categories>Financials and Documents)



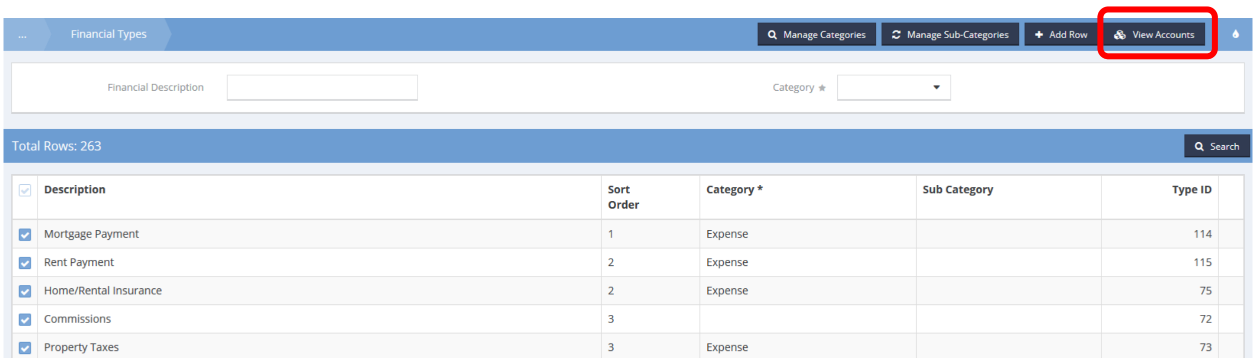
Click the icon for Financial Types. The Financial Types form displays.



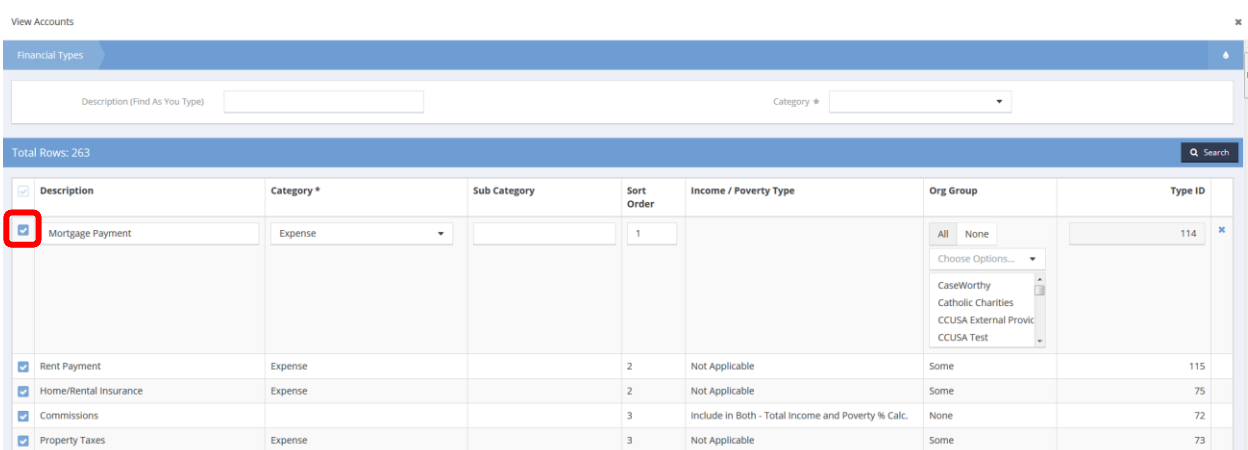
Click the Manage Sub-Categories button. The Financial SubCategory Types form displays.



To add a new sub-category, click the Add Row button. Select a category from the drop-down list and enter a description. To edit an existing sub-category, click the blue checkbox icon and make any desired changes. Click Save when finished.



On the Financial Types form, click the View Accounts button to view financial types in detail. The View Accounts form displays.

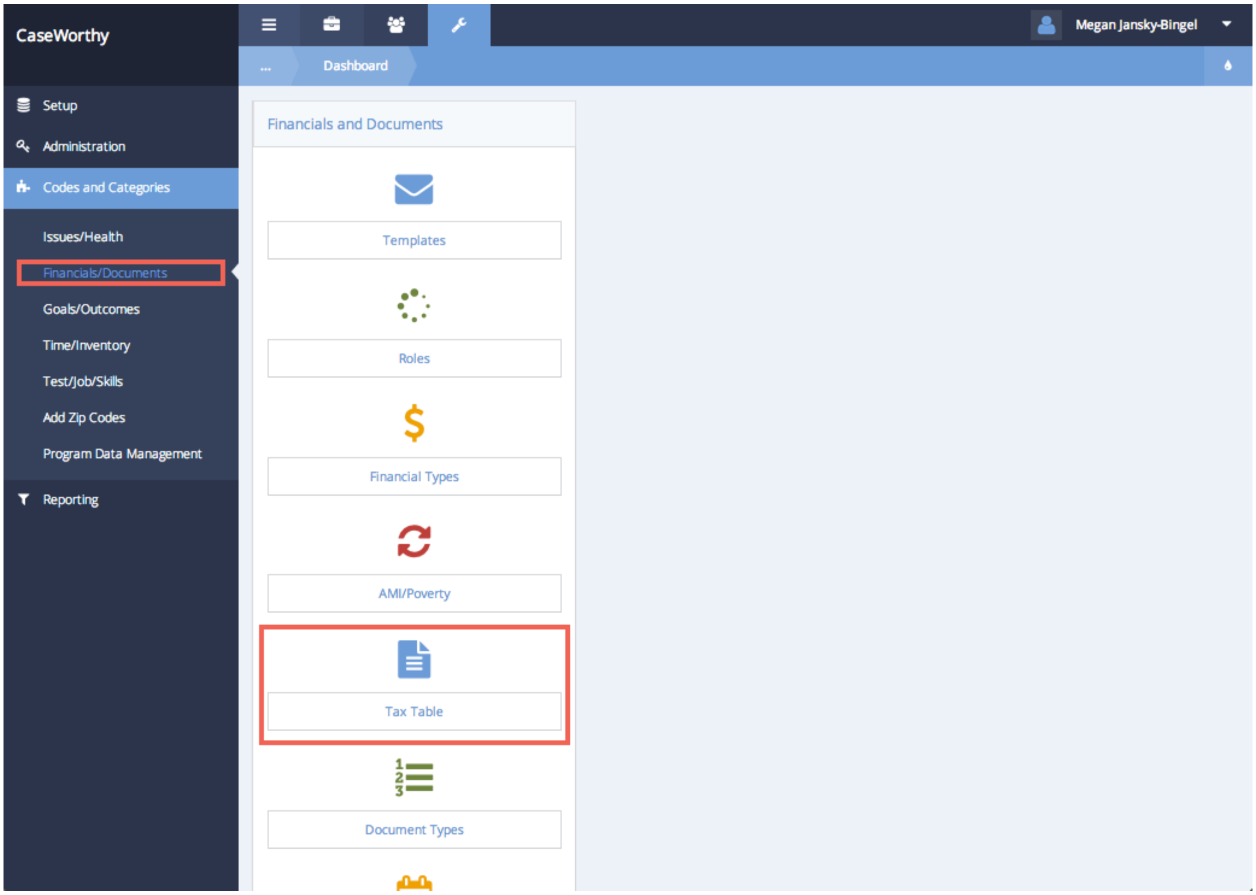


Click the blue checkbox icon to edit an item. Make any desired changes and click Save when finished.

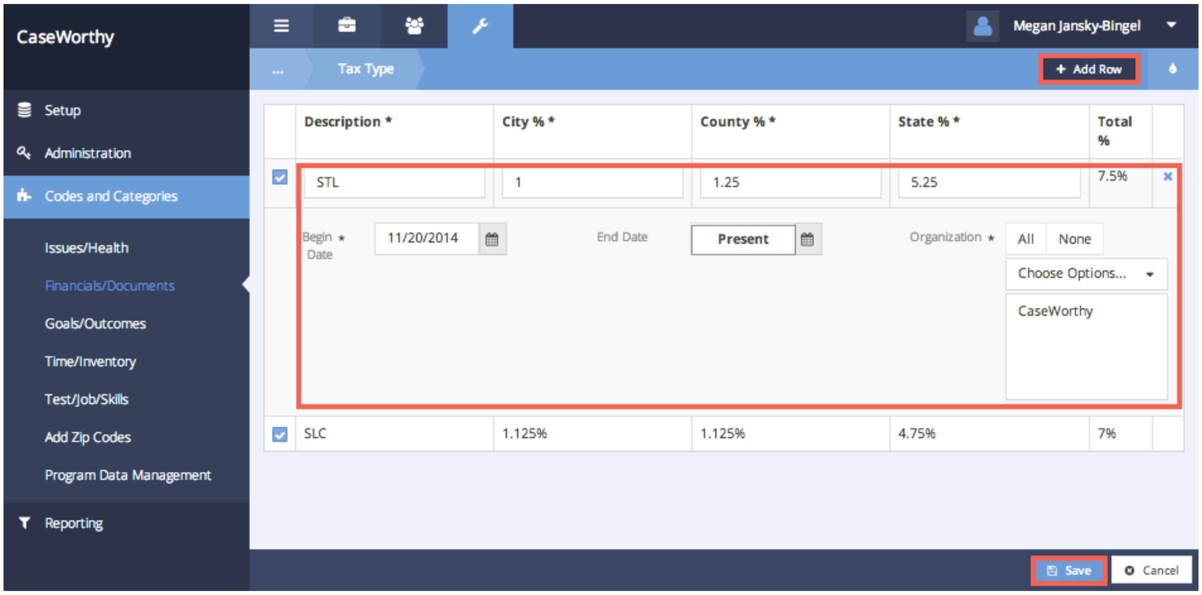
Tax Table

(Administration>Codes and Categories>Financials/Documents>Tax Table)

The Tax Table area allows system administrators to enter local area tax rates. To access the Tax Table area, click the Tax Table icon on the Financials and Documents dashboard.



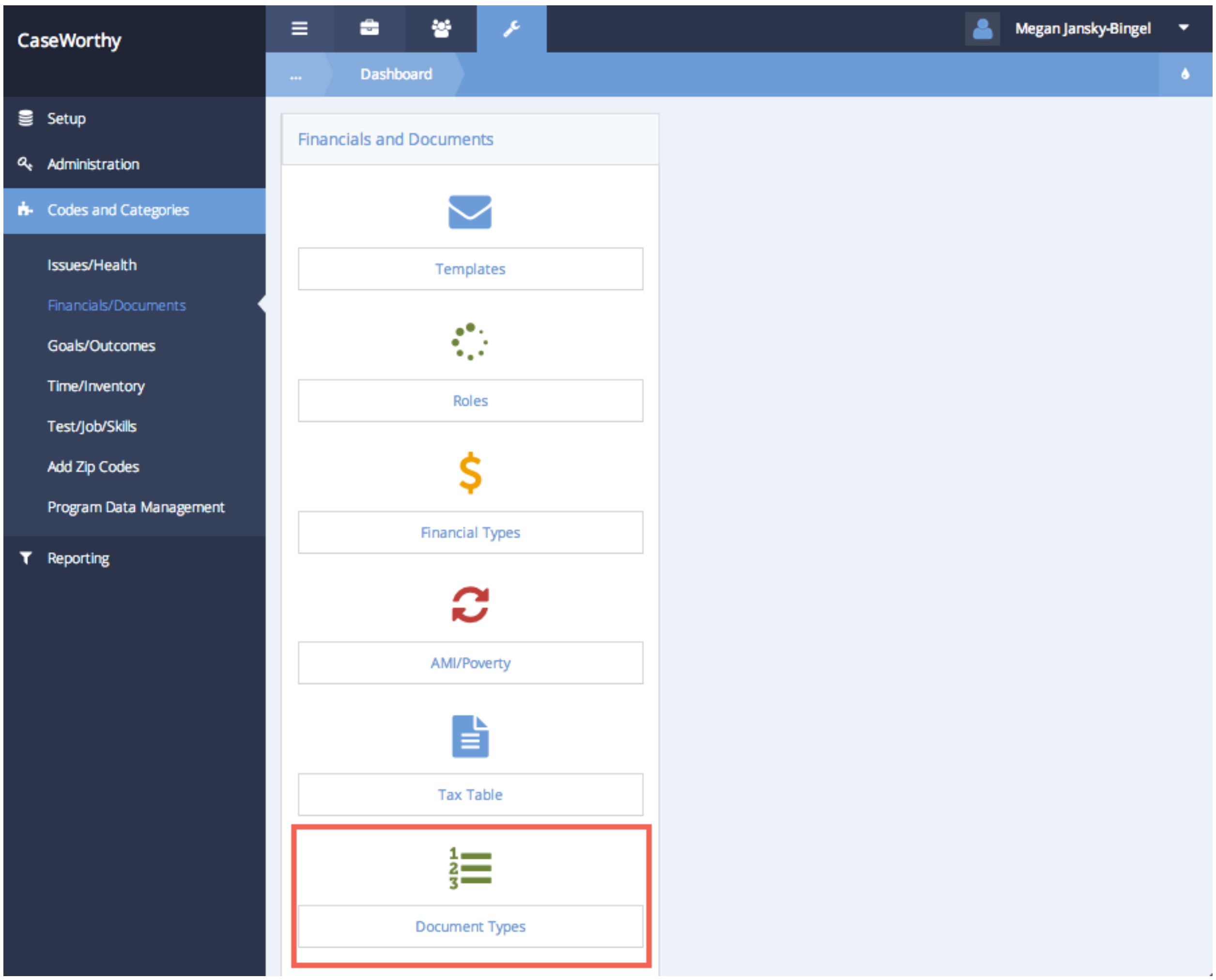
To add a local area Tax Table, click the + Add Row button. Add a row for each local area to be entered. Enter the area description and the tax rate for City, County and State. Edit the defaulted Begin and End Dates if necessary. Select the Organizations that have access to the Tax Table information entered. When all desired data is entered, click the Save button.

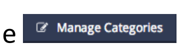

CaseWorthy
Megan Jansky-Bingel
Tax Type
Add Row
Setup
Administration
Codes and Categories
Issues/Health
Financials/Documents
Goals/Outcomes
Time/Inventory
Test/Job/Skills
Add Zip Codes
Program Data Management
Reporting
Description *
City % *
County % *
State % *
Total %
STL
1
1.25
5.25
7.5%
Begin Date *
11/20/2014
End Date
Present
Organization *
All
None
Choose Options...
CaseWorthy
SLC
1.125%
1.125%
4.75%
7%
Save
Cancel

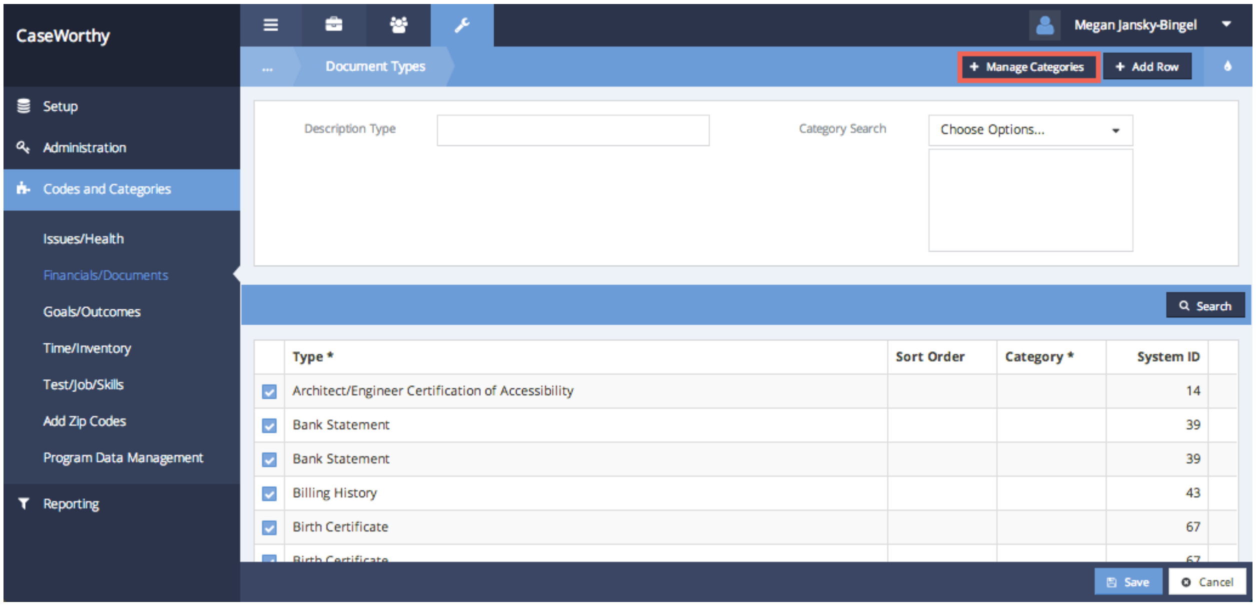
Documents Type

(Administration>Codes and Categories>Financials/Documents>Documents Type)

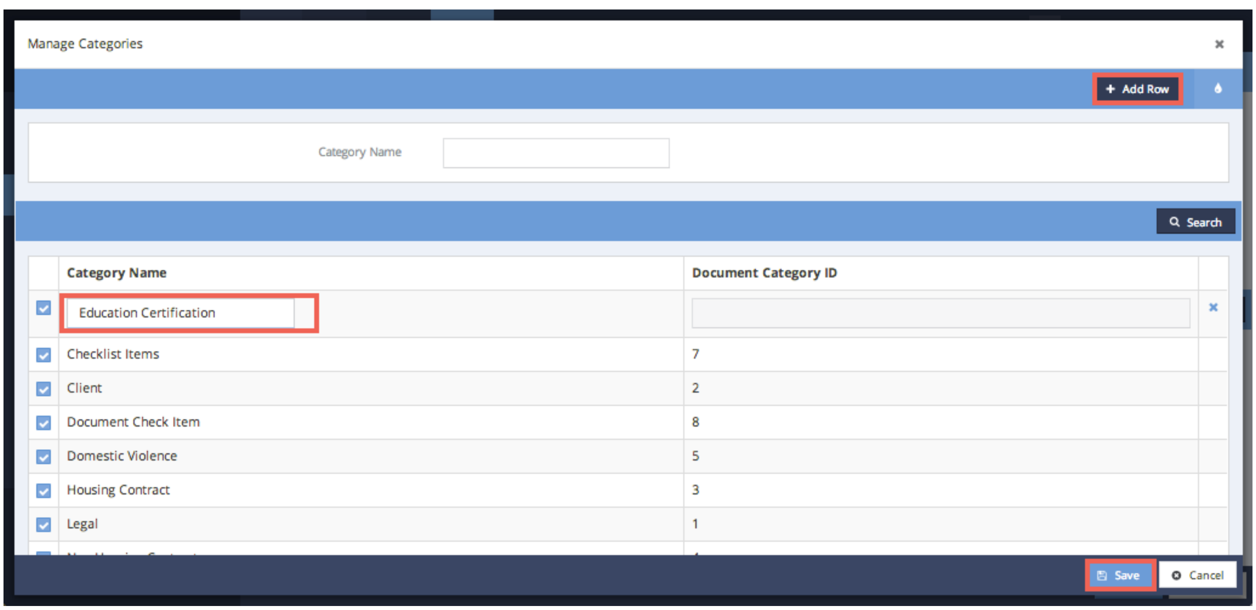
The Documents Type area allows system administrators to customize the documents list that displays on the files and documents form. To access the Documents Type form, click the Documents Type icon on the Financials / Documents dashboard.



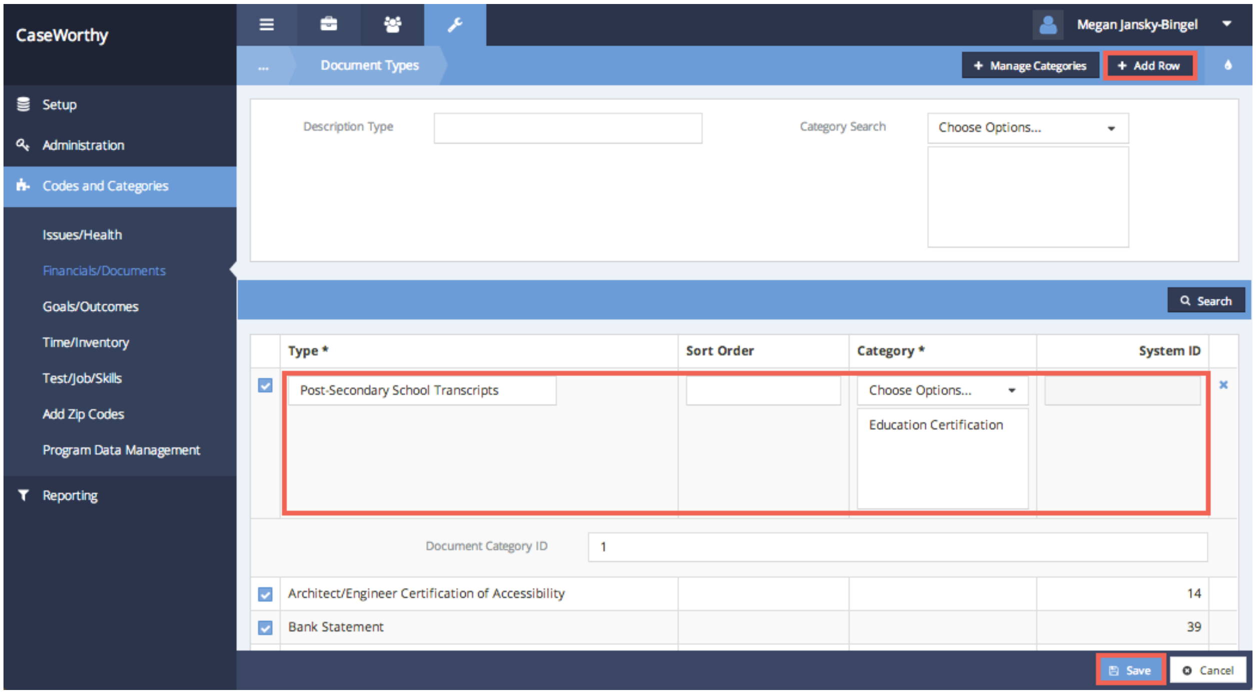
On the Document Types form, access the document categories by clicking the  button on the top right.



To add a document type category, click the Add Row button. Add a row for each category type to be entered. Enter the category description. Click Save when all desired category types have been entered.



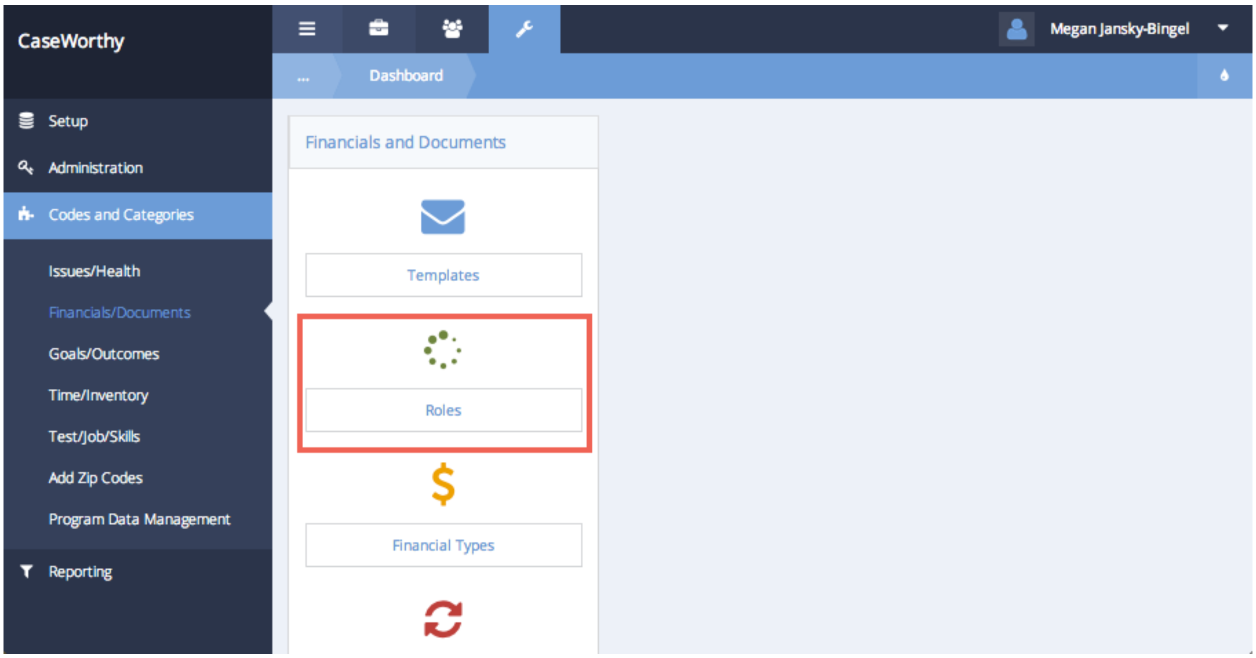
The Document Types form displays. To add a document type, click the Add Row button. Add a row for each document type to be entered. Enter a Description and Category. When all desired document types have been entered click the Save button.


CaseWorthy
Megan Jansky-Bingel
Document Types
Manage Categories
Add Row
Setup
Administration
Codes and Categories
Issues/Health
Financials/Documents
Goals/Outcomes
Time/Inventory
Test/Job/Skills
Add Zip Codes
Program Data Management
Reporting
Description Type
Category Search
Choose Options...
Search
Type *
Sort Order
Category *
System ID
Post-Secondary School Transcripts
Choose Options...
Education Certification
Document Category ID
1
Architect/Engineer Certification of Accessibility
14
Bank Statement
39
Save
Cancel

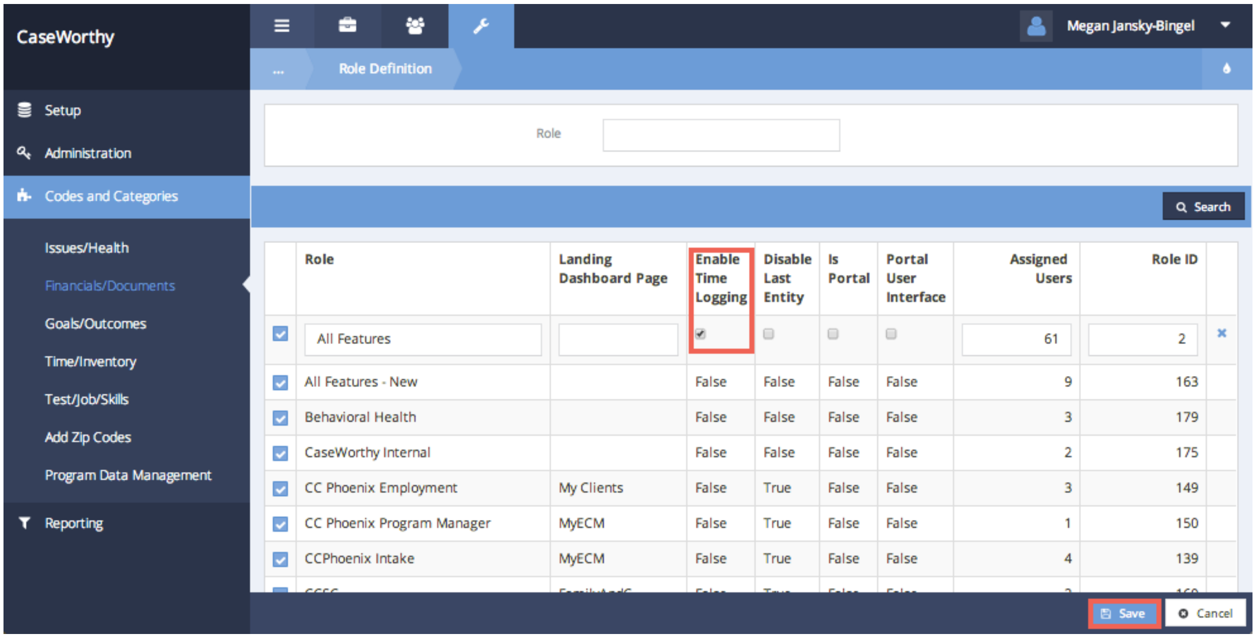
Roles

(Administration>Codes and Categories>Financials/Documents>Roles)

The Roles area is designed to provide an overview of how roles are set up. Most items are for information only. However, system administrators can enable or disable automated user time logging by role directly from this form. To access the Roles area, select the Roles icon on the Financials / Documents dashboard.



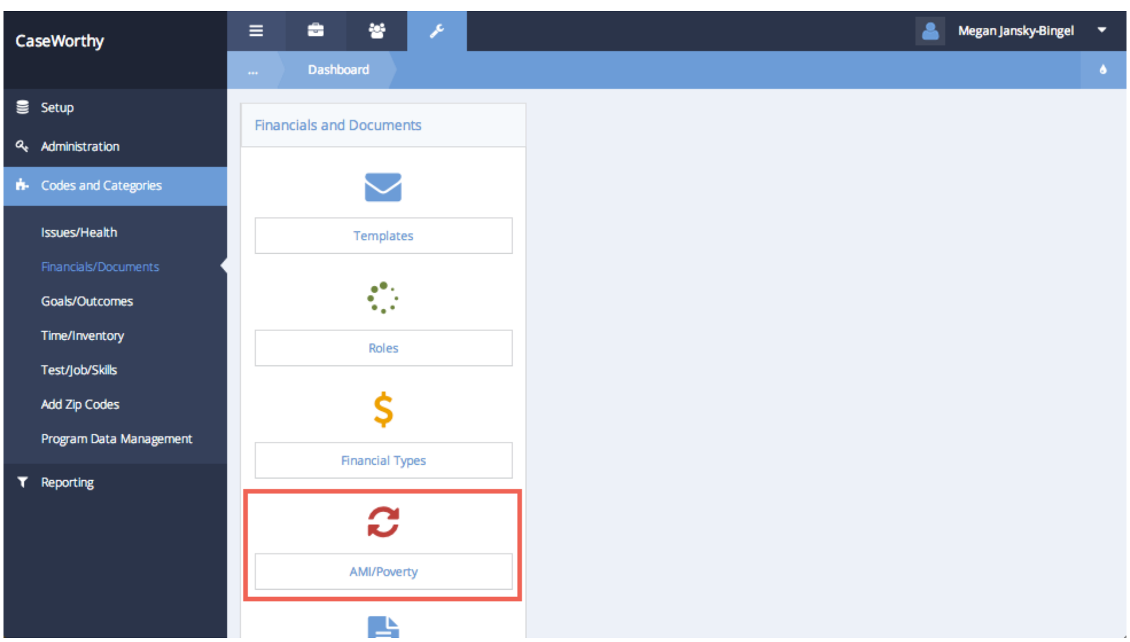
The Role Definition form displays. To edit the time logging setting, click the blue checkbox next to the desired role. Click or unclick the Enable Time Logging checkbox. When all roles have Enable Time Logging set as desired, click the Save button.



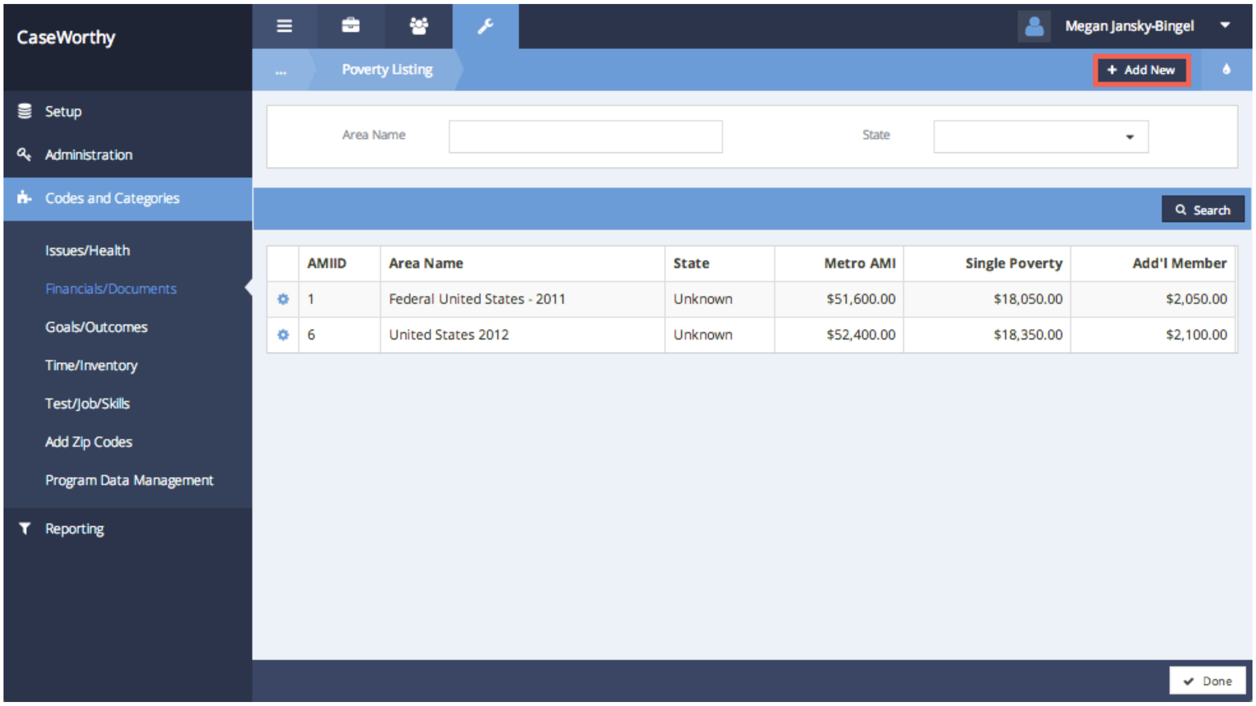
AMI/Poverty

(Administration>Codes and Categories>Financials/Documents>AMI/Poverty)

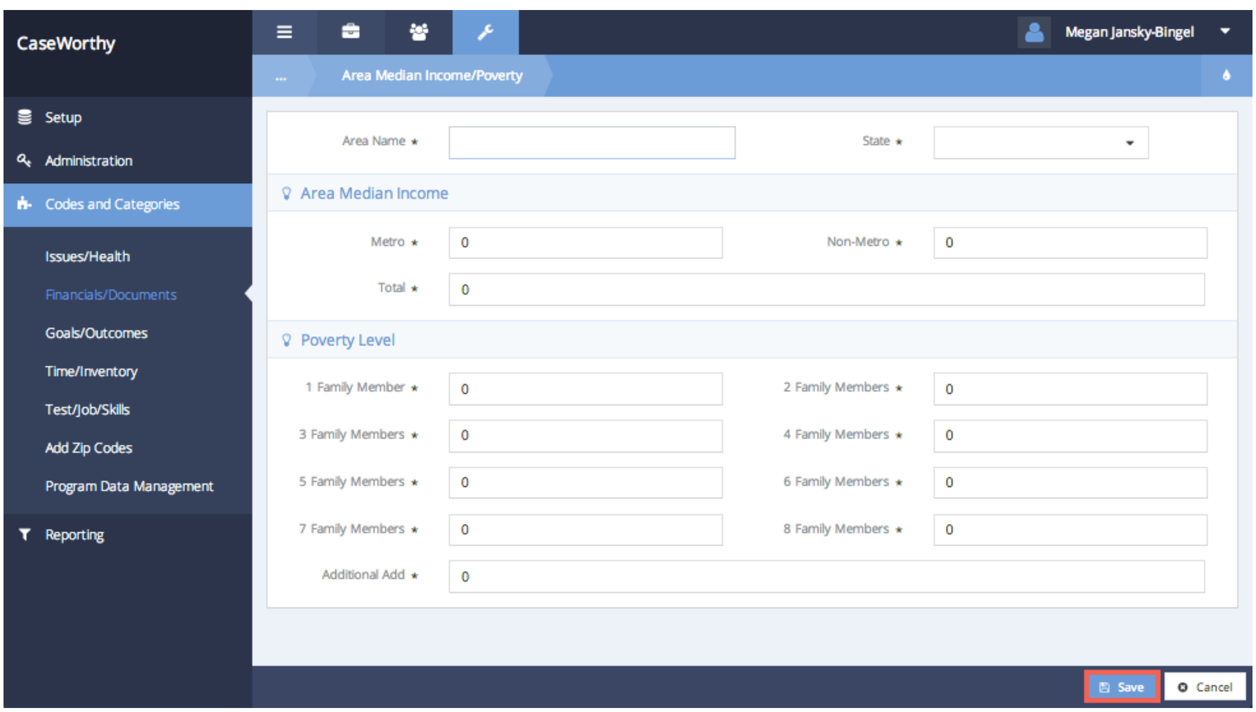
System administrators use the AMI/Poverty area to set the Area Median Income and Poverty Levels to be used by the system on the financial assessment form. To access the AMI/Poverty set up area, select the AMI/Poverty icon on the Financials / Documents dashboard.



The Poverty Listing summary form displays. To add an AMI/Poverty listing, click the + Add New button.



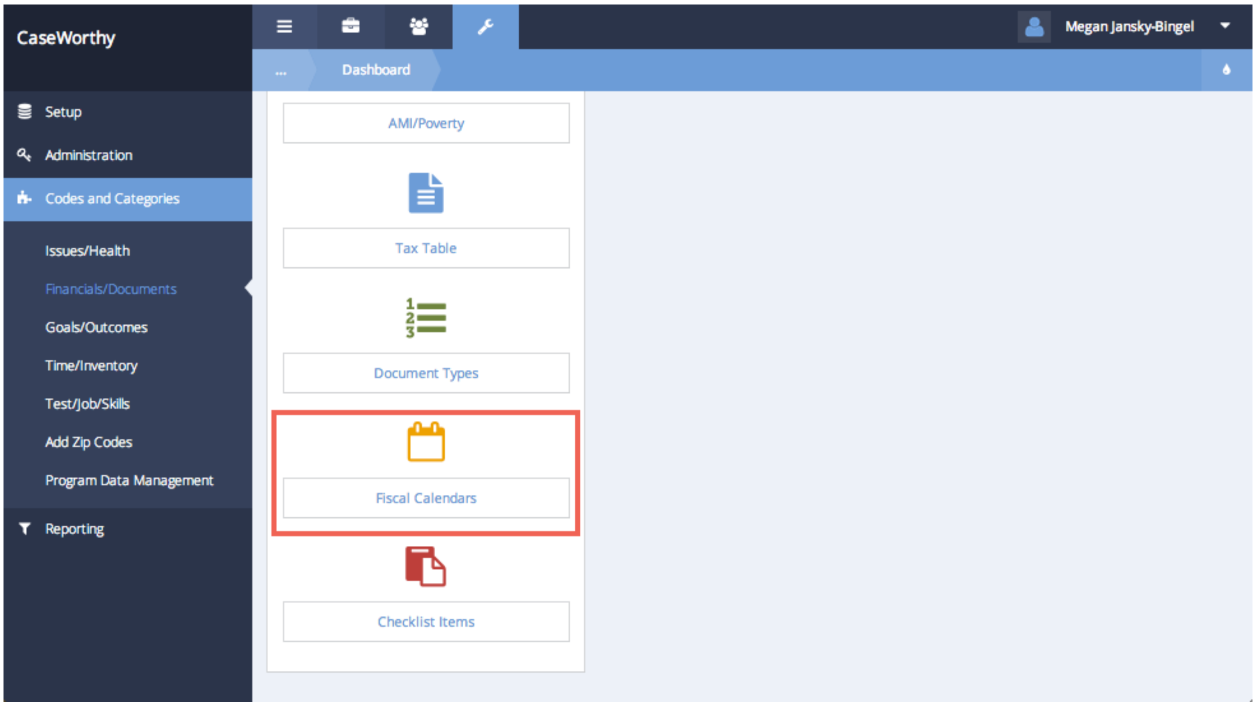
The Area Median Income/Poverty form displays. Enter an Area Name and the State. Complete the Area Median Income fields as well as the Poverty Level fields. When all data has been entered, click the Save button.



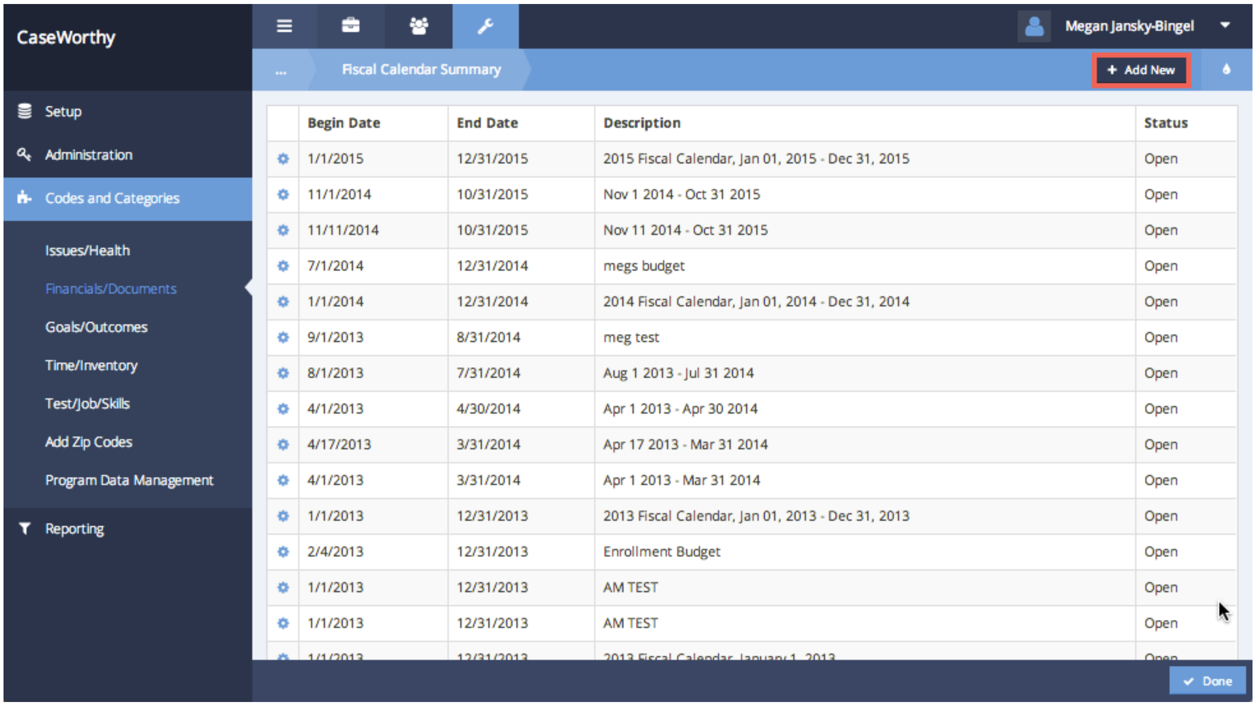
Fiscal Calendars

(Administration>Codes and Categories>Financials/Documents>Fiscal Calendars)

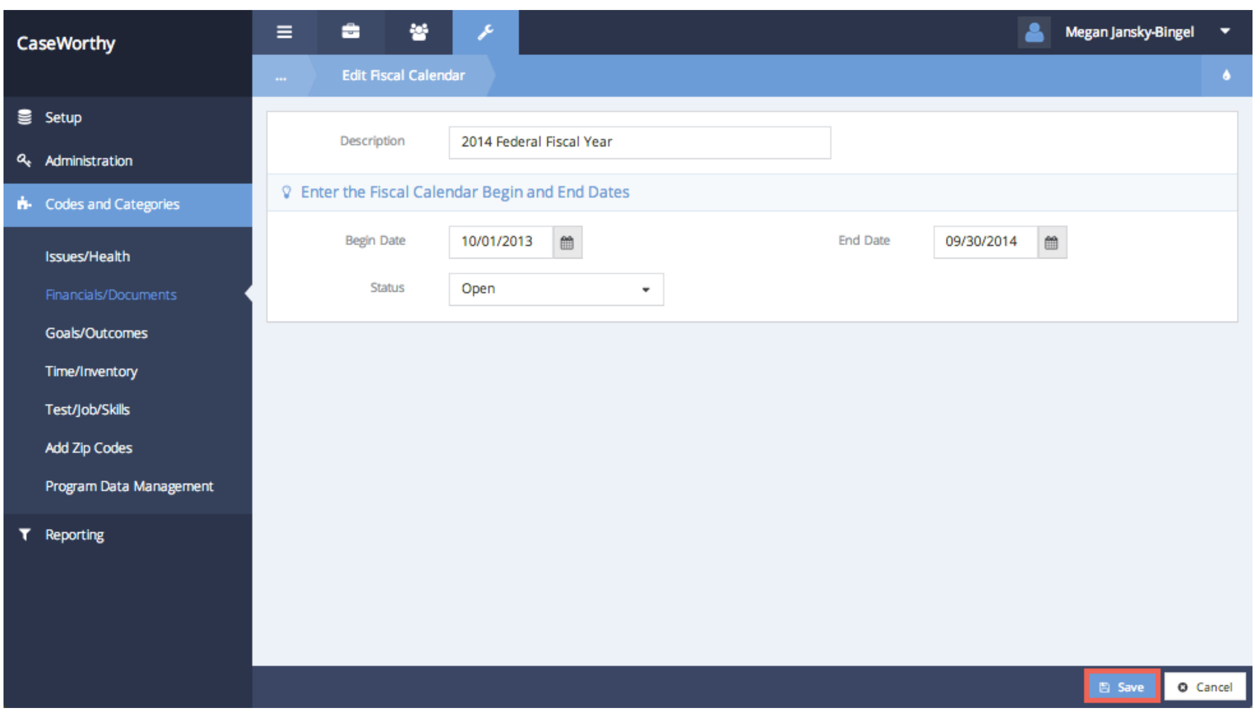
This area allows system administrators to manually create or edit fiscal calendars. They can also be auto-generated by the system. For more information refer to the Program Budget area of this manual. To access Fiscal Calendars, select the Fiscal Calendar icon on the Financials / Documents dashboard.



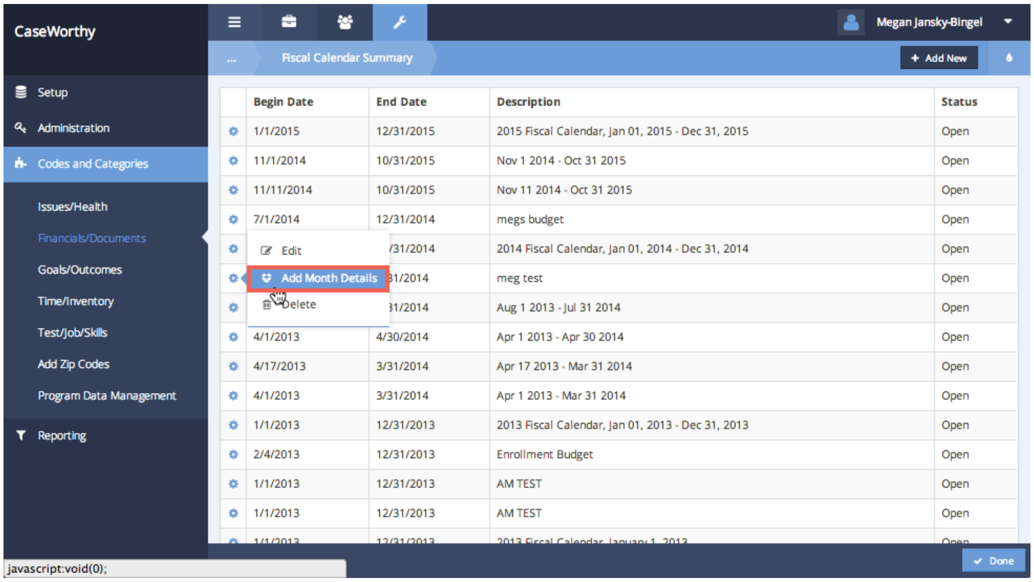
The Fiscal Calendar summary form displays. To add a fiscal calendar, click the + Add New button. **NOTE:** ***It is much easier to set up fiscal calendars in the Program Budget area.***



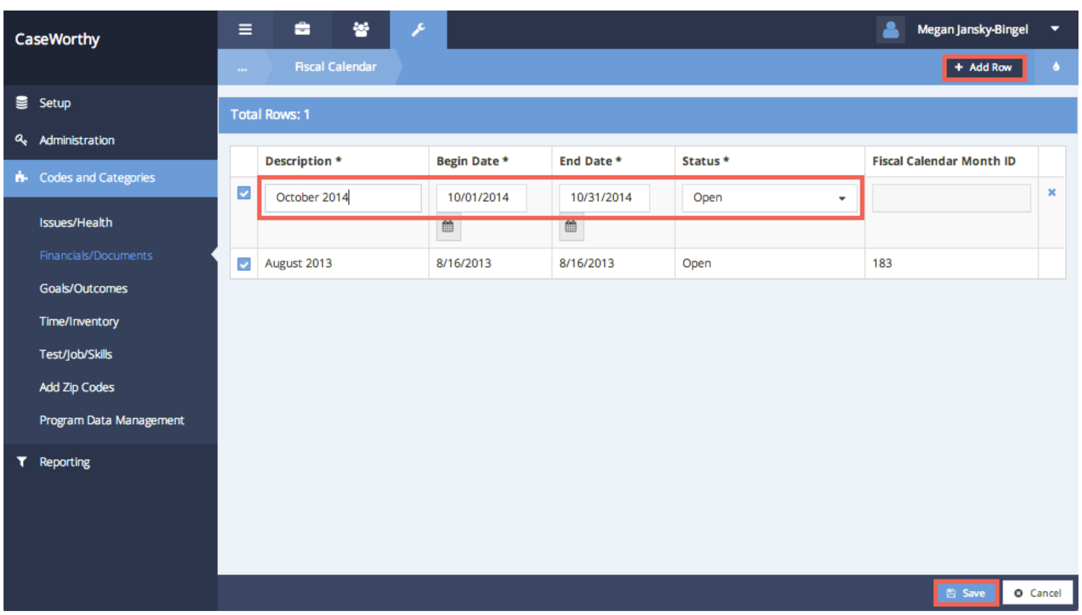
The Fiscal Calendar form displays. Enter a name or description for the fiscal year being created. Indicate the Begin Date, End Date and Status of the calendar. When all desired data have been entered click the Save button.



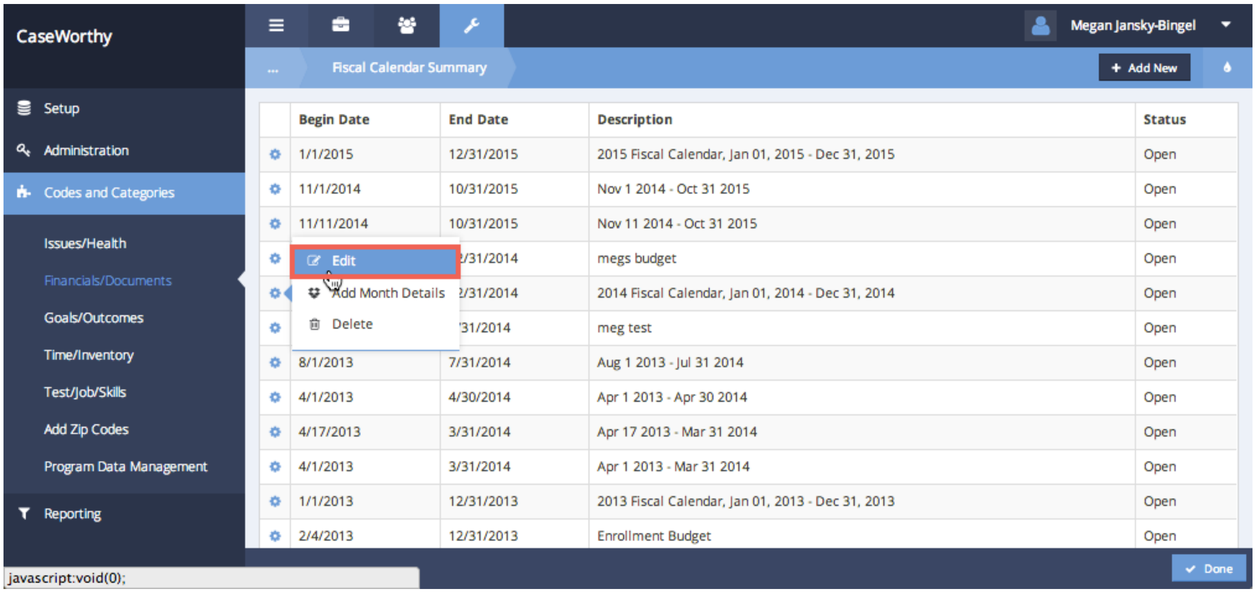
The Fiscal Calendar summary form displays. To set up or edit the months included in the fiscal calendar, click on the action gear next to the desired calendar and select "Add Month Details".

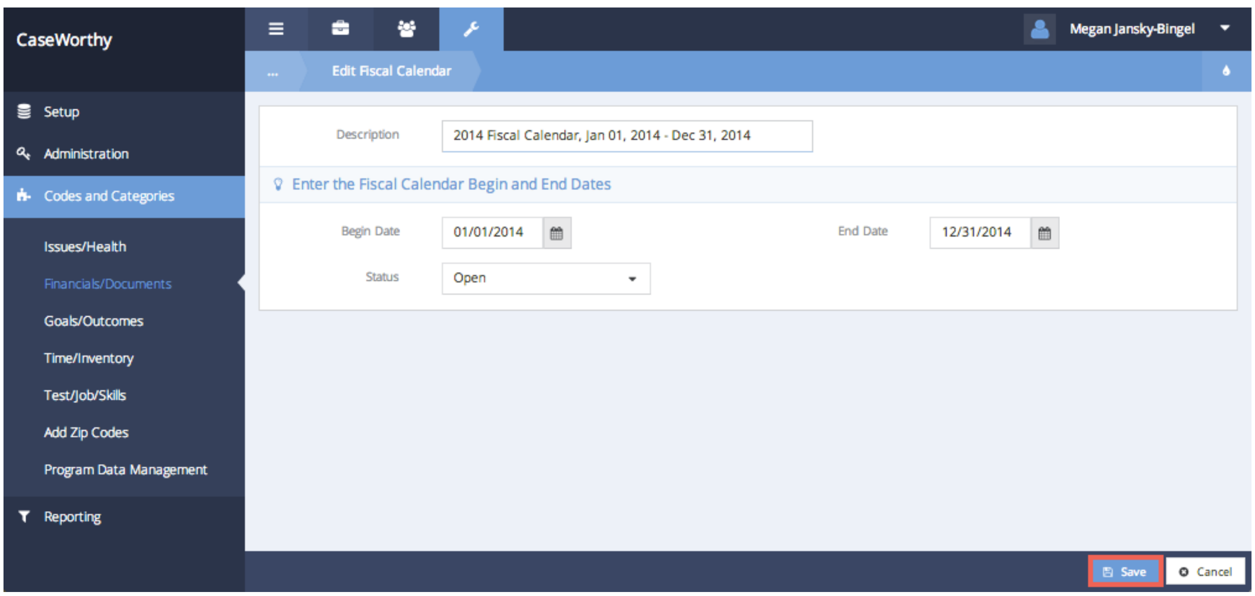


The Fiscal Calendar set up form displays. To add a month to the calendar, click the + Add Row button. On this form, only one row can be added at a time. Enter all the information for the month, then click the + Add Row button again. There is no need to save the form until after all desired months have been entered, but clicking the + Add Row button before completing each row requires the user to go back and re-open each row to enter the Description, Begin Date, End Date and Status data. When all desired months have been entered, click the Save button.



The Fiscal Calendar summary form displays. To edit the calendar name/description, begin or end dates or status, click the action gear next to the desired calendar and select “Edit”. The edit form functions exactly as the set-up form. Simply enter the desired changes and click the Save button.

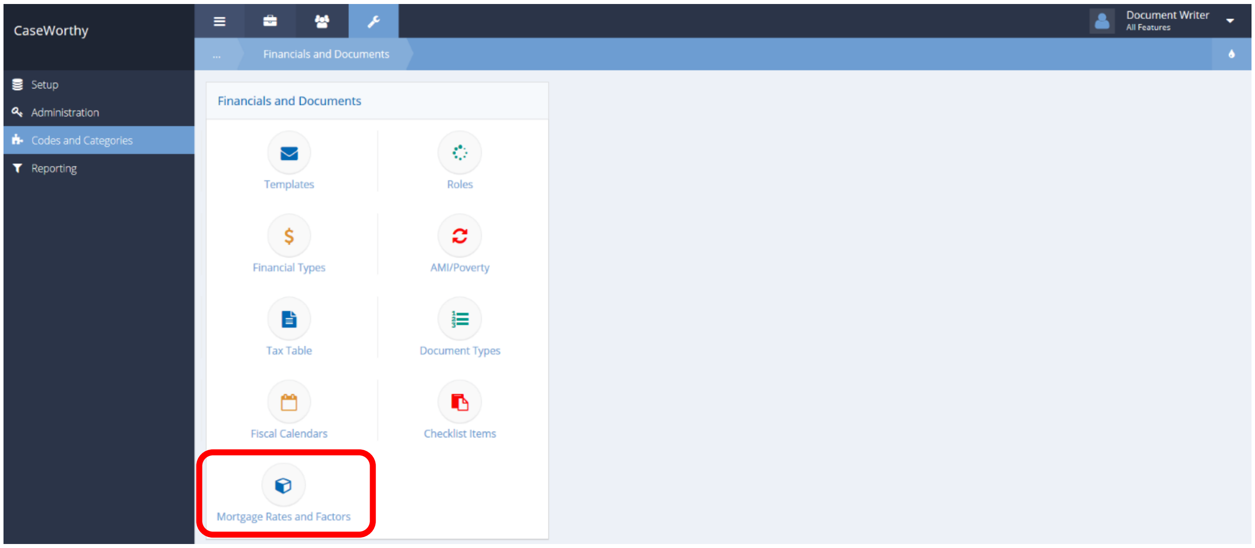

CaseWorthy
Megan Jansky-Bingel
Fiscal Calendar Summary
Add New
Setup
Administration
Codes and Categories
Issues/Health
Financials/Documents
Goals/Outcomes
Time/Inventory
Test/Job/Skills
Add Zip Codes
Program Data Management
Reporting
Begin Date
End Date
Description
Status
1/1/2015 12/31/2015 2015 Fiscal Calendar, Jan 01, 2015 - Dec 31, 2015 Open
11/1/2014 10/31/2015 Nov 1 2014 - Oct 31 2015 Open
11/11/2014 10/31/2015 Nov 11 2014 - Oct 31 2015 Open
Edit
Add Month Details
Delete
megs budget Open
2014 Fiscal Calendar, Jan 01, 2014 - Dec 31, 2014 Open
meg test Open
8/1/2013 7/31/2014 Aug 1 2013 - Jul 31 2014 Open
4/1/2013 4/30/2014 Apr 1 2013 - Apr 30 2014 Open
4/17/2013 3/31/2014 Apr 17 2013 - Mar 31 2014 Open
4/1/2013 3/31/2014 Apr 1 2013 - Mar 31 2014 Open
1/1/2013 12/31/2013 2013 Fiscal Calendar, Jan 01, 2013 - Dec 31, 2013 Open
2/4/2013 12/31/2013 Enrollment Budget Open
javascript:void(0);
Done


CaseWorthy
Megan Jansky-Bingel
Edit Fiscal Calendar
Setup
Administration
Codes and Categories
Issues/Health
Financials/Documents
Goals/Outcomes
Time/Inventory
Test/Job/Skills
Add Zip Codes
Program Data Management
Reporting
Description
2014 Fiscal Calendar, Jan 01, 2014 - Dec 31, 2014
Enter the Fiscal Calendar Begin and End Dates
Begin Date
01/01/2014
End Date
12/31/2014
Status
Open
Save
Cancel

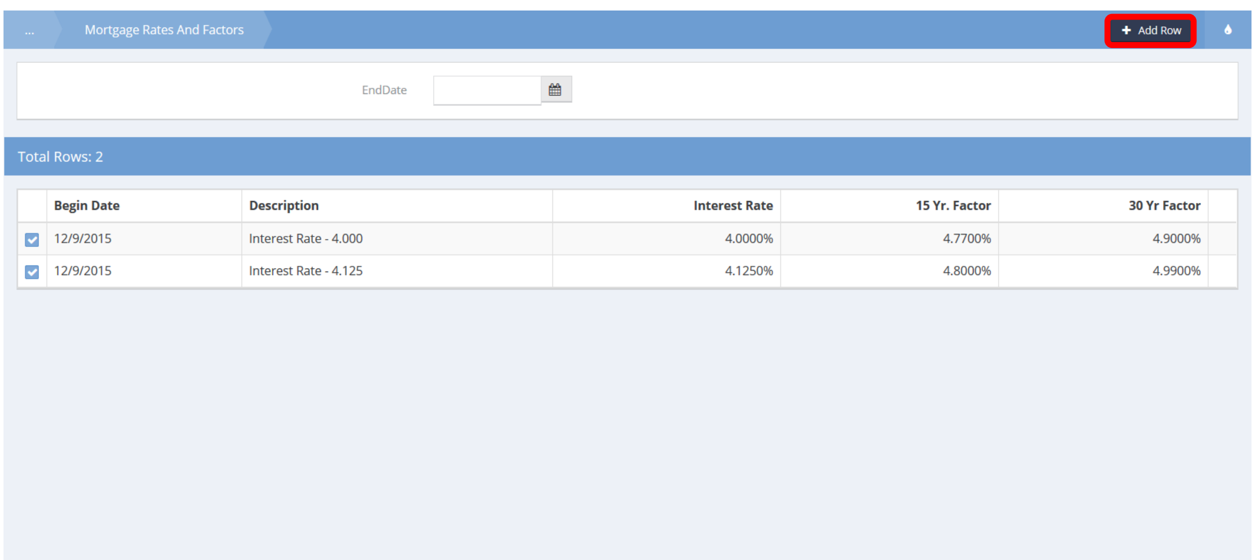
Mortgage Rates and Factors

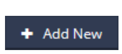
Objective: Add or edit mortgage rates

Navigation: Administration>Codes and Categories>Financials and Documents

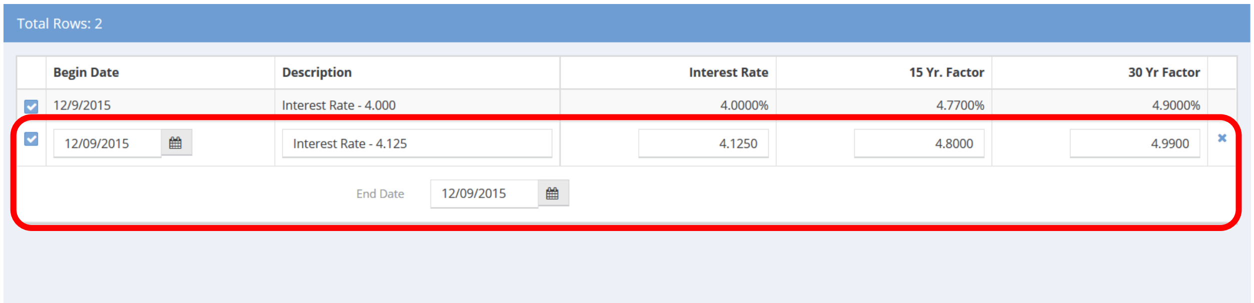


Select Mortgage Rates and Factors from the Financials and Documents portion of the Financials and Documents dashboard. The Mortgage Rates and Factors form displays.



To add a new entry, click the 

button. Click the blue checkbox  icon to edit an entry, the row expands.



Make any necessary edits. Click the 

button to save and exit.

Issues/Health

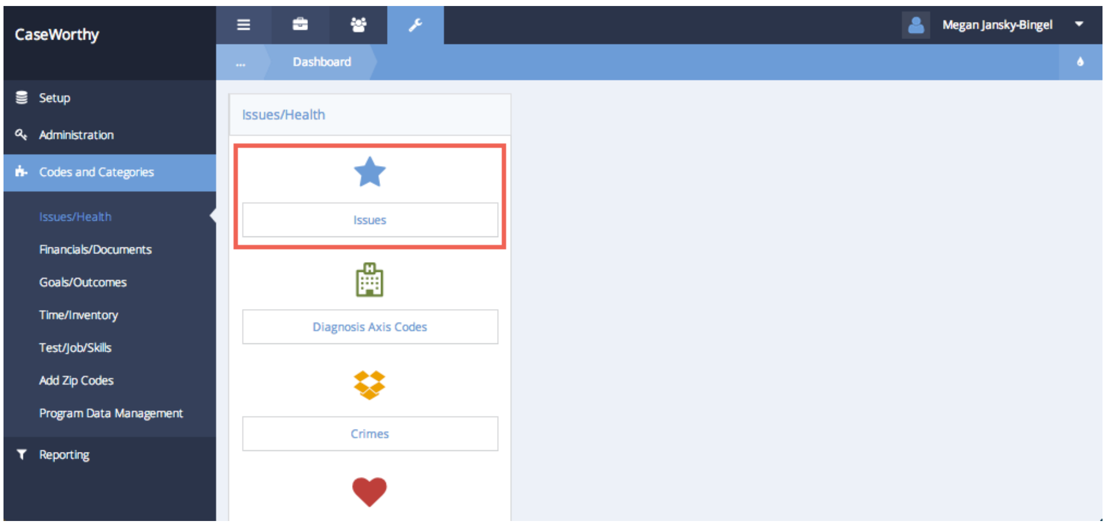
(Administration>Codes and Categories>Issues/Health)

The Issues and Health section of the Codes and Categories menu includes options to customize Issues, Crimes, Medications, Immunizations and Allergies.

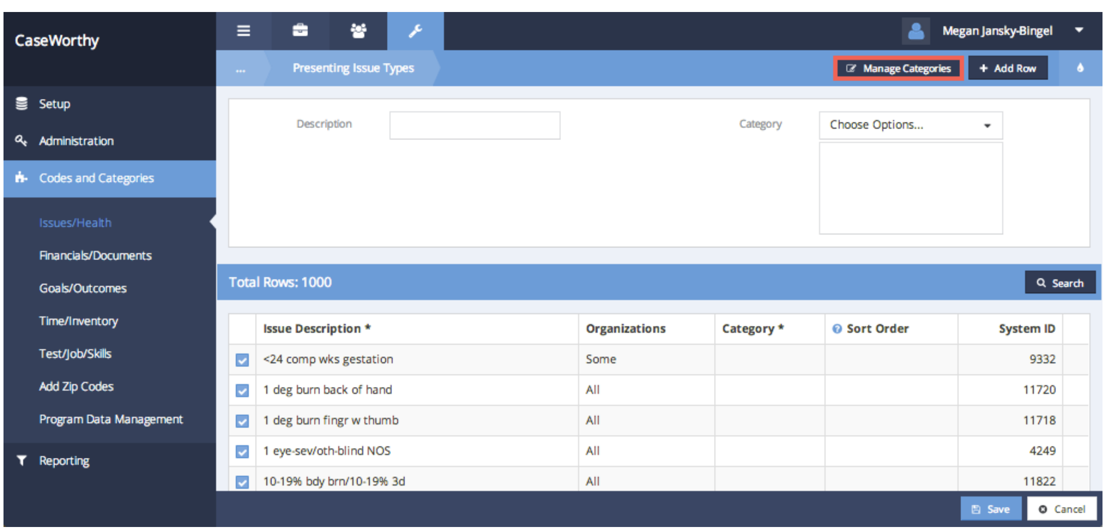
Issues

(Administration>Codes and Categories>Issues/Health>Issues)

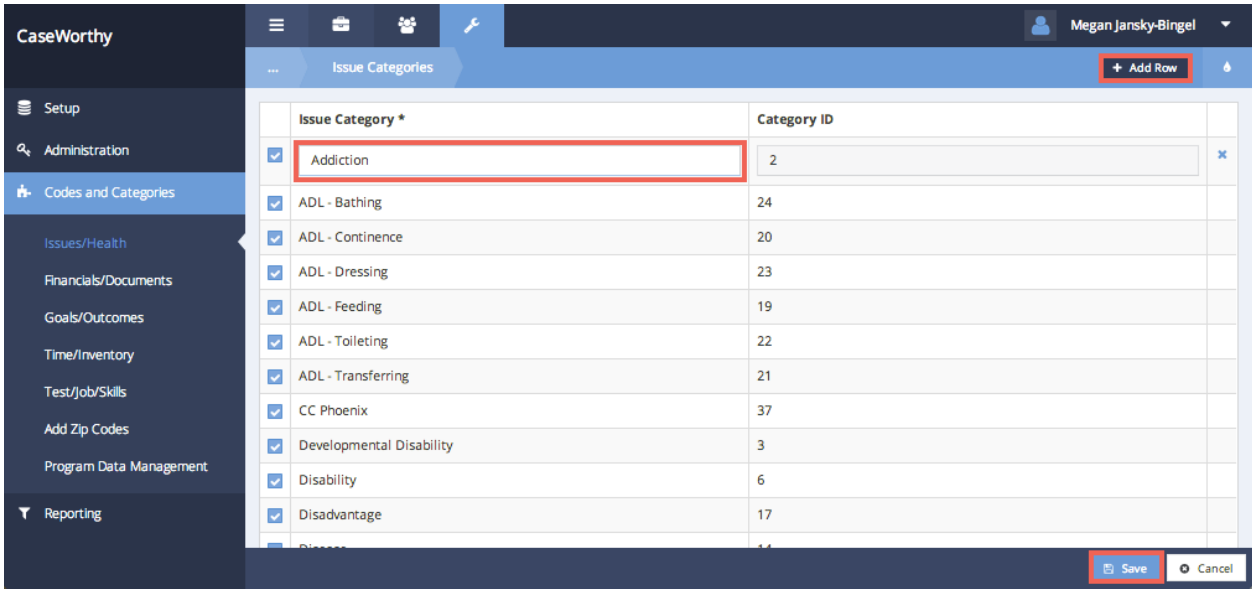
The Issues area allows system administrators to customize the issue list accessible to users. To access the Issues set up area, select the Issues icon on the Issues / Health dashboard.



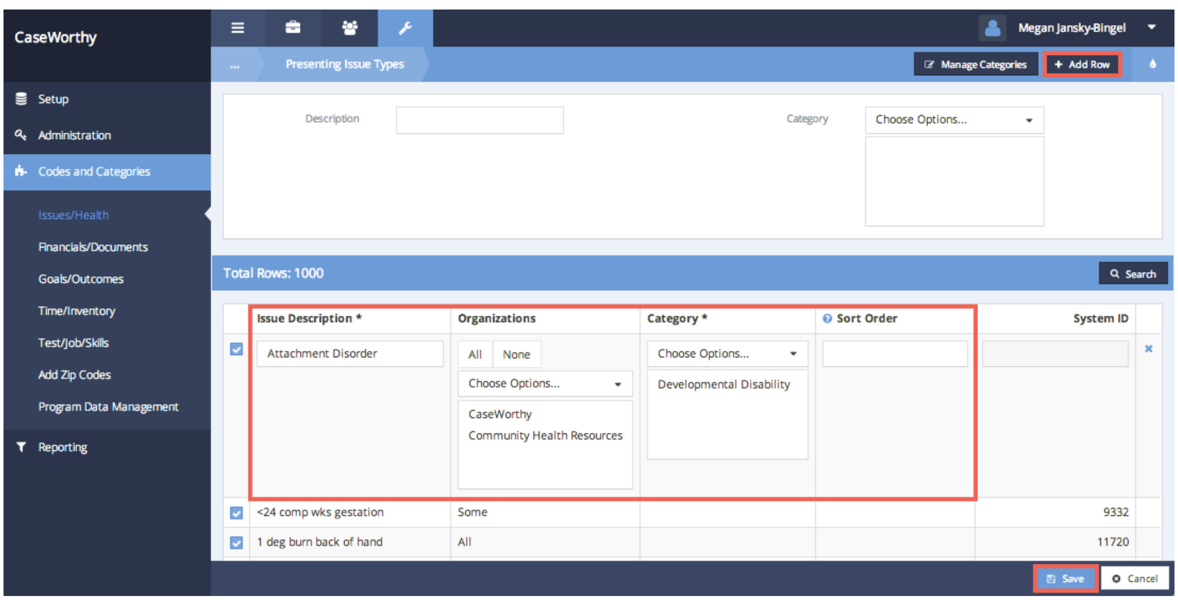
On the Issue Types form, access the issue categories by clicking the Manage Categories button on the top right.



To add an issue category, click the Add Row button. Add a row for each category to be entered. Enter the category description. Click Save when all desired categories have been entered.



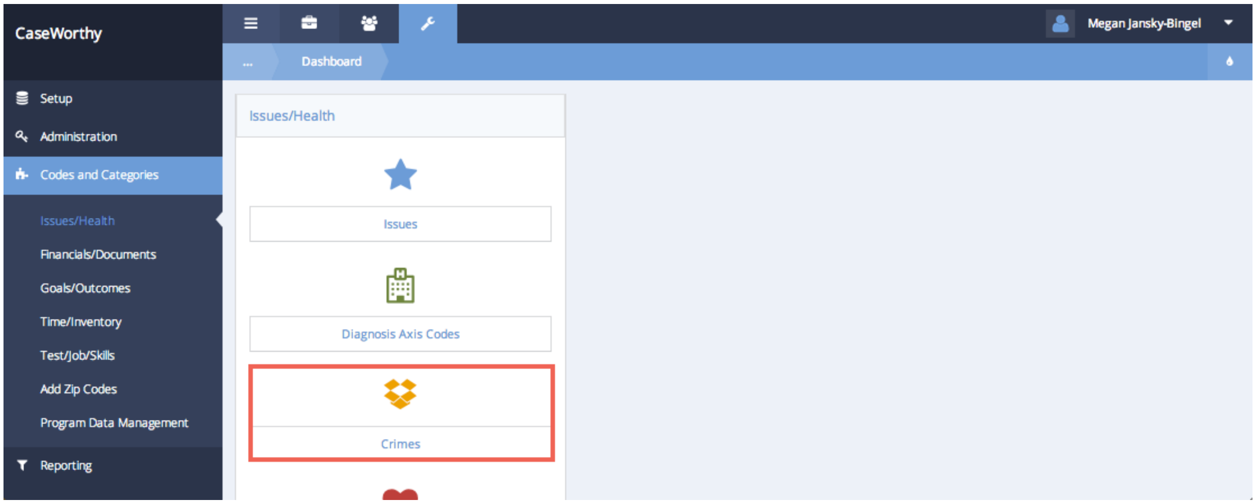
The Issue Types form displays. To add an issue type, click the + Add Row button. Add a row for each issue type to be entered. Enter a Description and Category. Link the organizations that should have access to the issue type. When all desired issue types have been entered click the Save button.



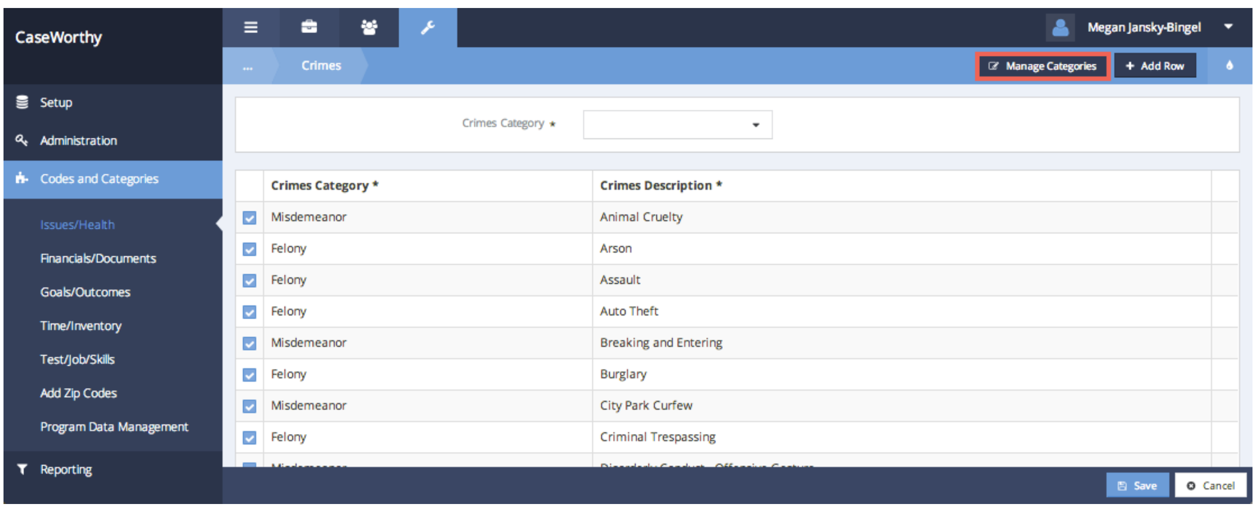
Crimes

(Administration>Codes and Categories>Issues/Health>Crimes)

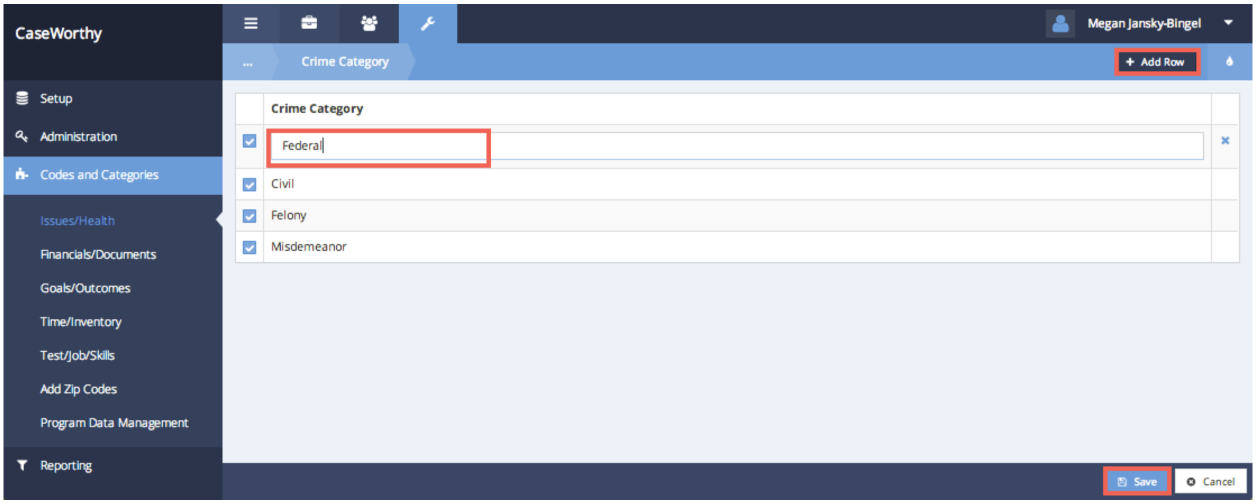
The Crimes area allows system administrators to customize the crimes list accessible to users. To access the Crimes set up area, select the Crimes icon on the Issues / Health dashboard.



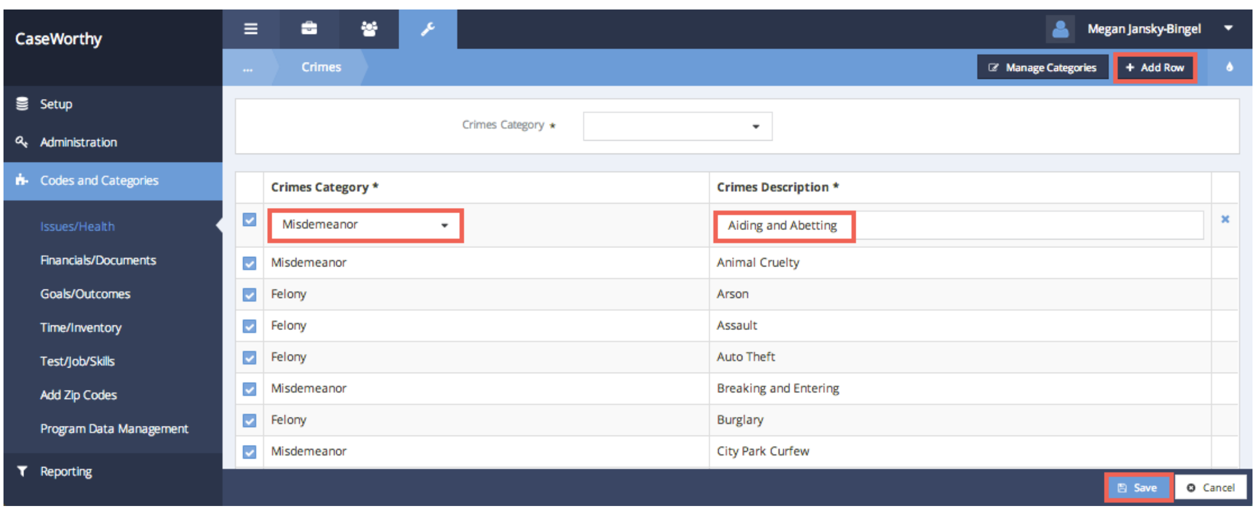
On the Crimes form, access the crimes categories by clicking the Manage Categories button on the top right.



To add a crime category, click the Add Row button. Add a row for each category to be entered. Enter the category description. Click Save when all desired categories have been entered.



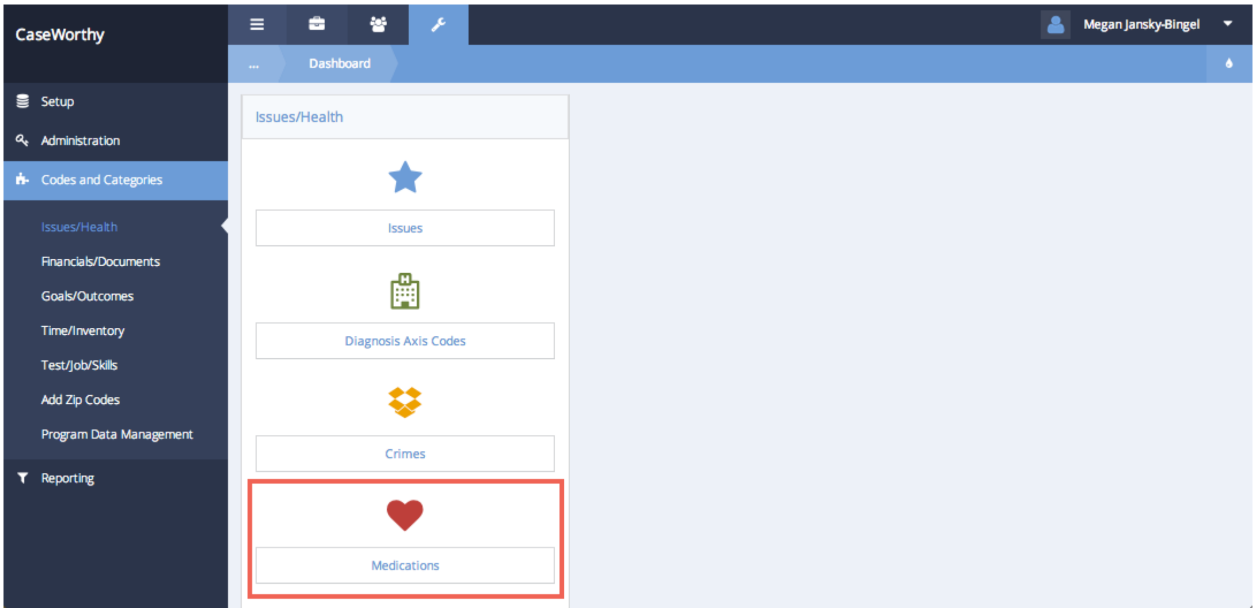
The Crimes form displays. To add a Crime, click the + Add Row button. Add a row for each crime to be entered. Enter a Description and Category. When all desired crimes have been entered click the Save button.



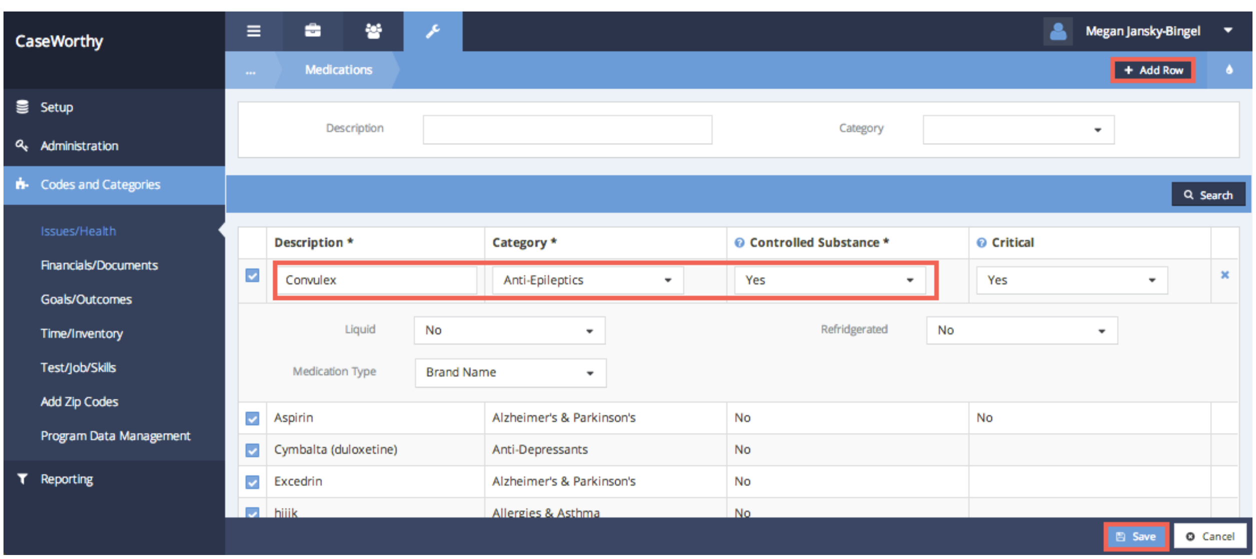
Medications

(Administration>Codes and Categories>Issues/Health>Medications)

The Medications area allows system administrators to customize the medication list accessible to users. To access the Medications set up area, select the Medication icon on the Issues / Health dashboard.



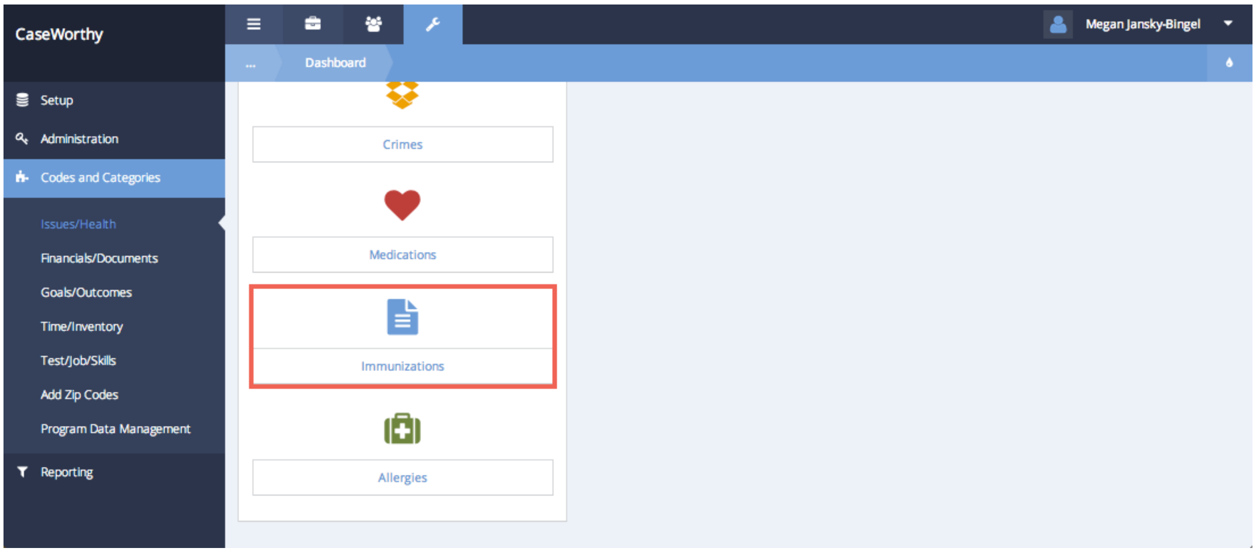
The Medications form displays. To add a medication, click the + Add Row button. Add a row for each medication to be entered. Enter a Description, then select a Category and Medication Type. When all desired medications have been entered click the Save button.



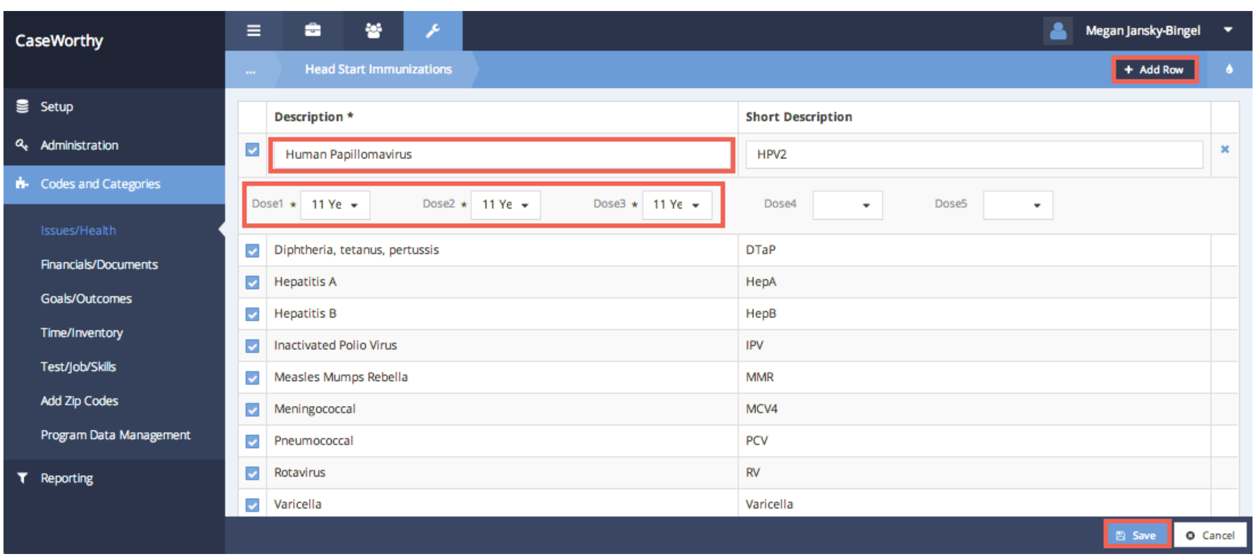
Immunizations

(Administration>Codes and Categories>Issues/Health>Immunizations)

The Immunization area allows system administrators to customize the immunization list accessible to users. To access the Immunizations set up area, select the Immunizations icon on the Issues / Health dashboard.



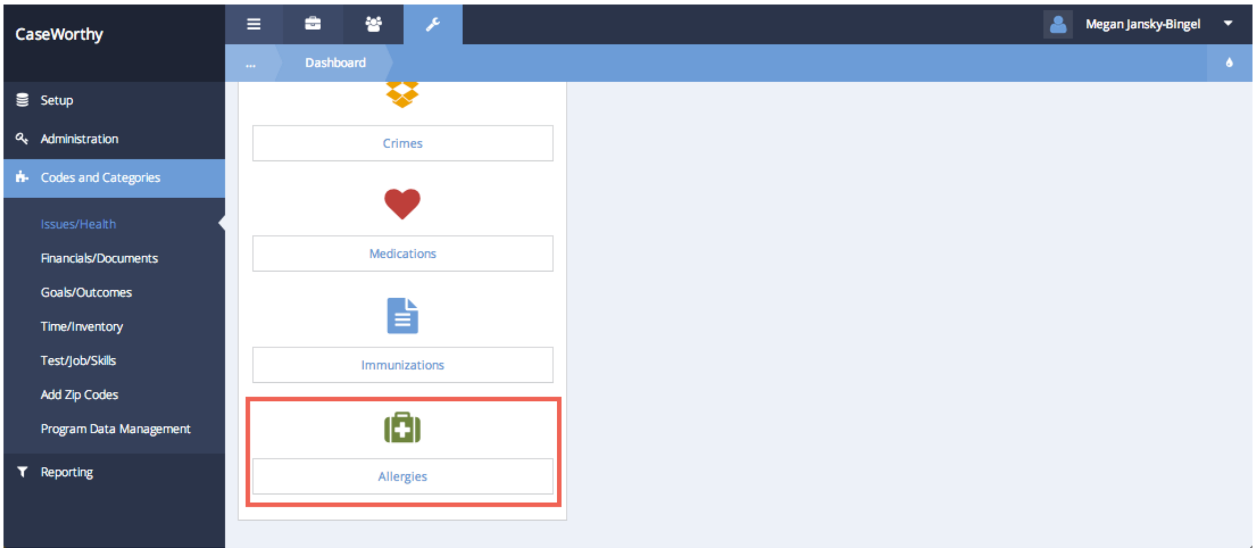
The Immunizations form displays. To add an immunization, click the + Add Row button. Add a row for each immunization to be entered. Enter a Description, Short Description and relevant Dose recommendations. When all desired immunizations have been entered click the Save button.



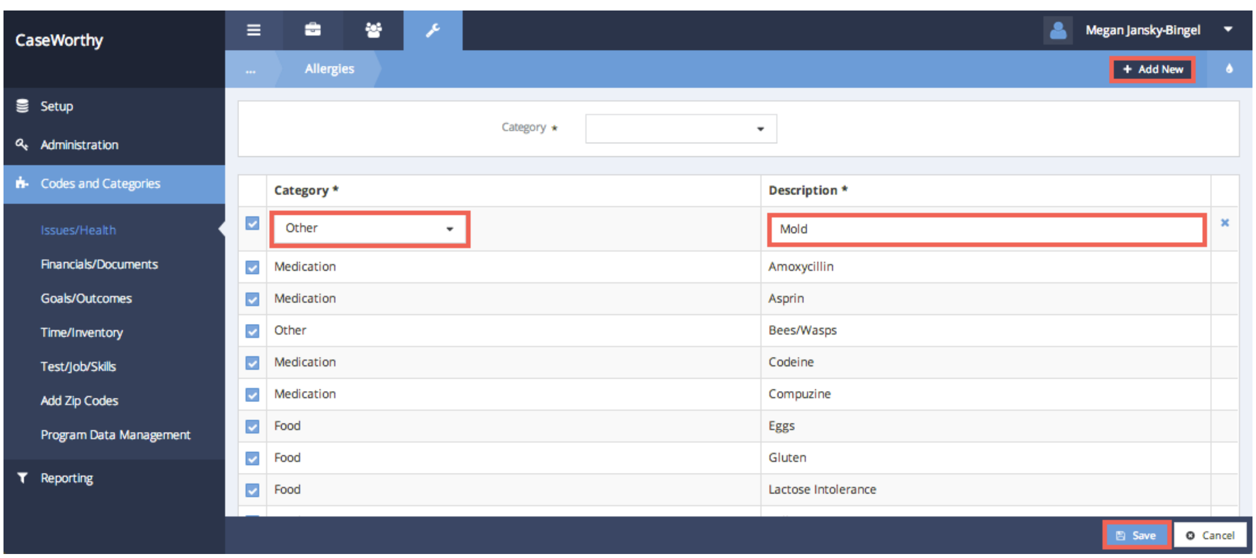
Allergies

(Administration>Codes and Categories>Issues/Health>Allergies)

The Allergies area allows system administrators to customize the allergies list accessible to users. To access the Allergies set up area, select the Allergies icon on the Issues / Health dashboard.

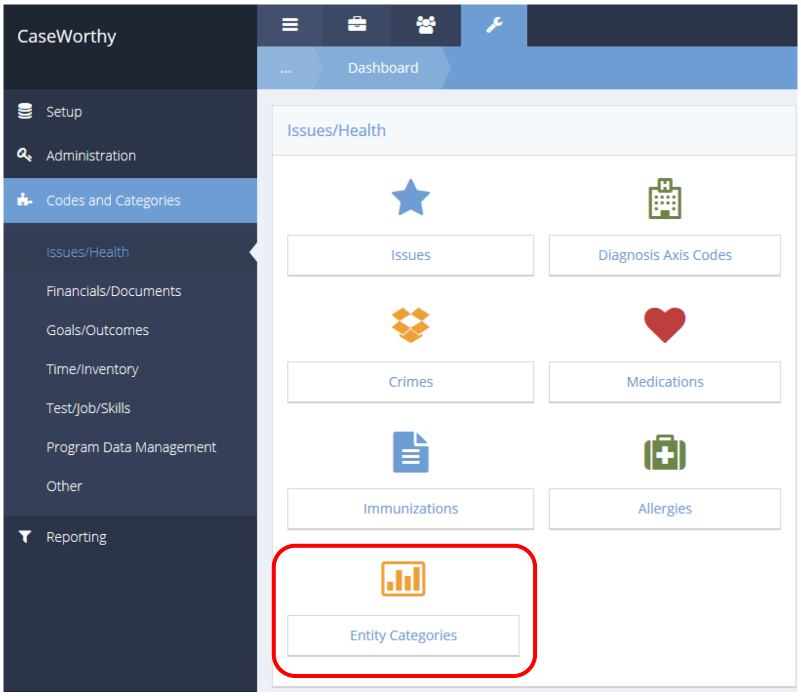


The Allergies form displays. To add an allergy, click the + Add Row button. Add a row for each allergy to be entered. Enter a Description and select a Category. When all desired allergies have been entered click the Save button.

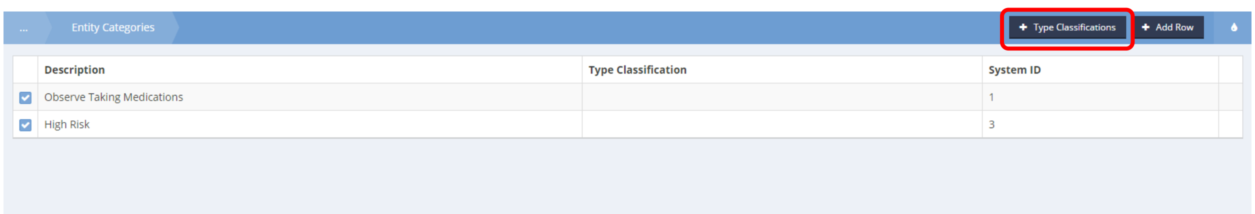


Entity Class Types

(Administration>Codes and Categories>Issues/Health>Entity Categories)



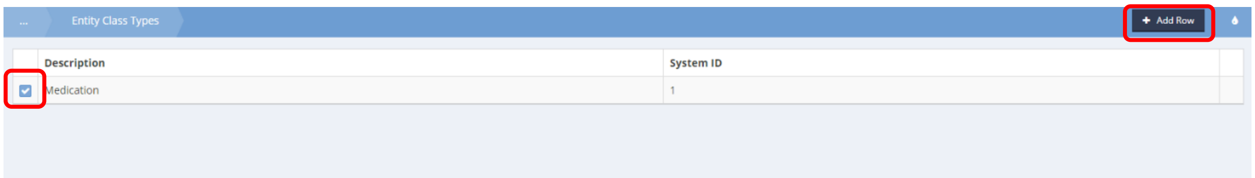
Click on the Entity Categories icon. The Entity Categories form displays.



Click the 

button.

The Entity Class Types form displays.



Click the blue checkbox to edit an existing class type. The row expands for editing. Click Add Row to add a new class type. A new, expanded row appears. Enter a description and system ID. Click Save when finished.

Goals/Outcomes

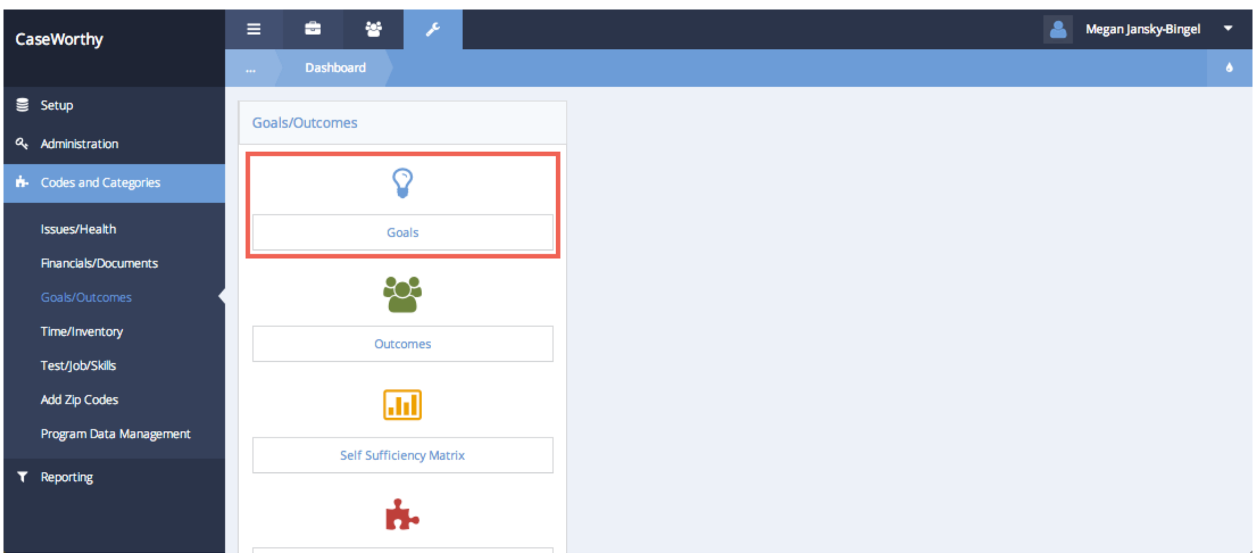
(Administration>Codes and Categories>Goals/Outcomes)

The Goals / Outcomes section of the Codes and Categories menu includes options to customize Goals, Outcomes, Goal Steps, Questions and Answers.

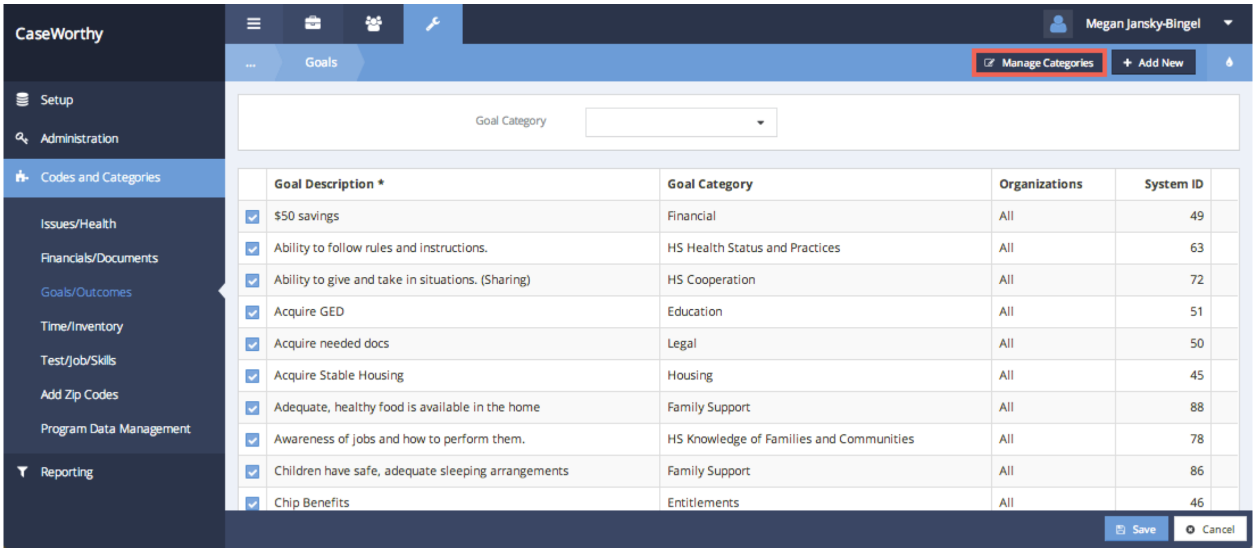
Goals

(Administration>Codes and Categories>Goals/Outcomes>Goals)

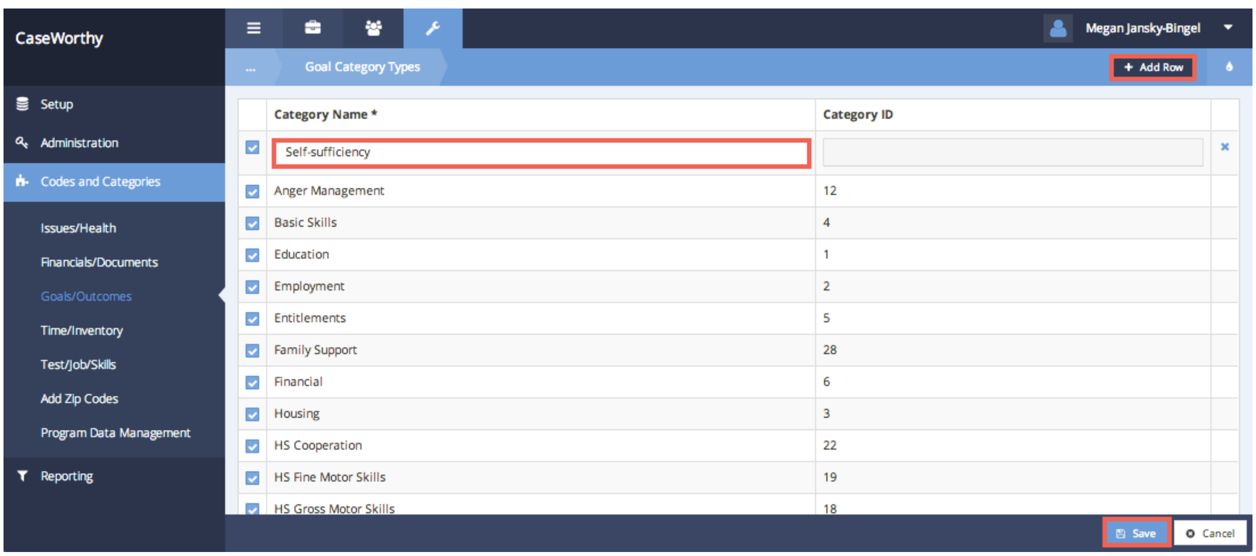
The Goals area allows system administrators to customize the goal list accessible to users. To access the Goals set up area, select the Goals icon on the Goals / Outcomes dashboard.



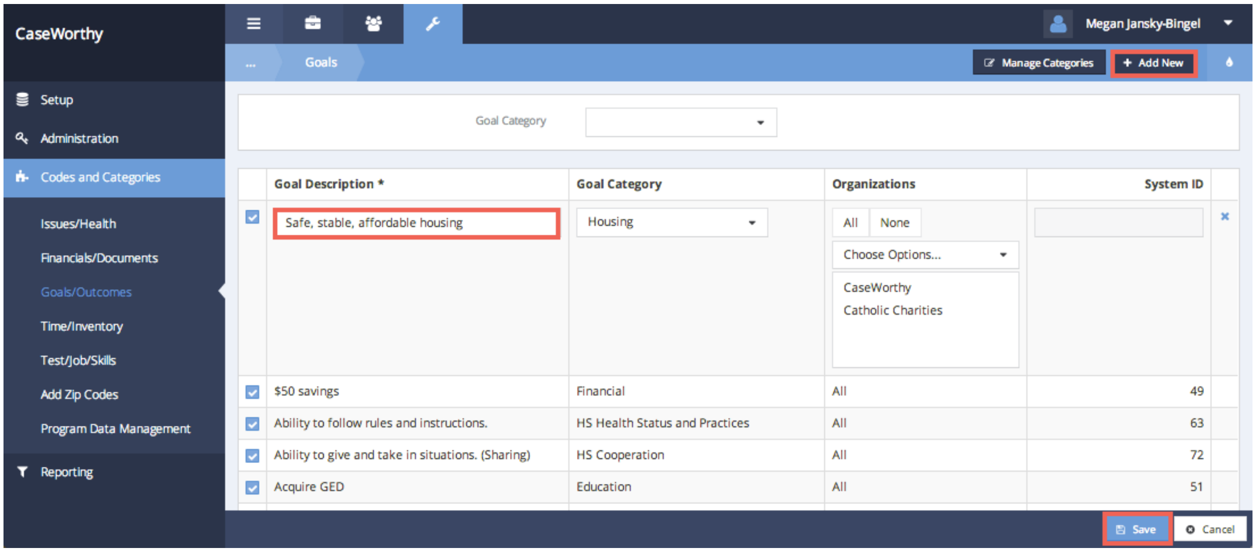
On the Goals form, access the goal categories by clicking the Manage Categories button on the top right.



To add a goal category, click the + Add Row button. Add a row for each category to be entered. Enter the category description. Click Save when all desired categories have been entered.



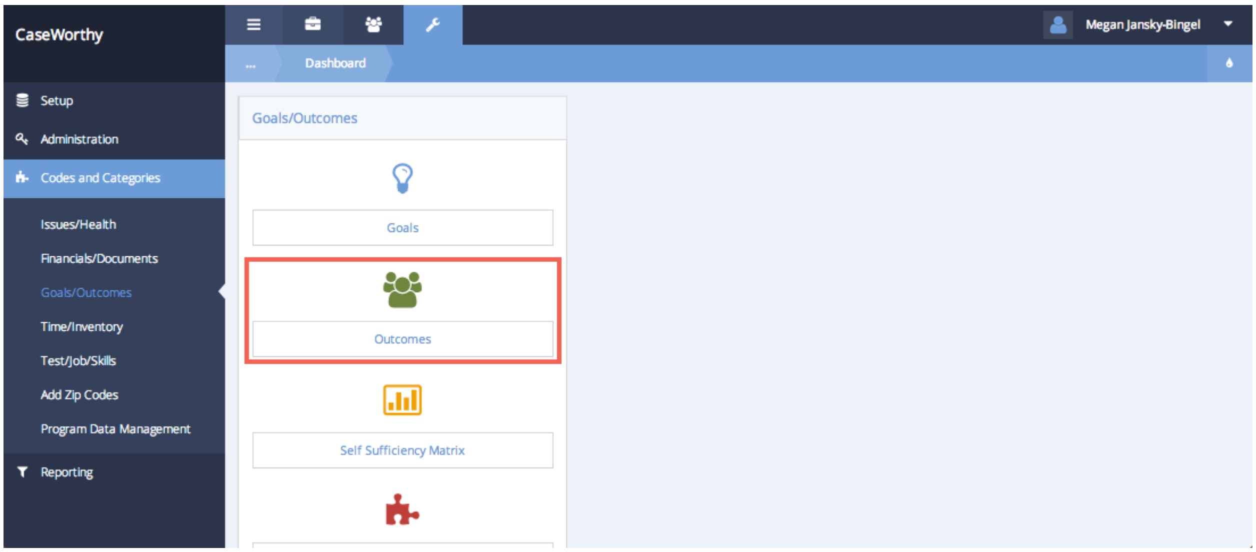
The Goals form displays. To add a goal, click the + Add Row button. Add a row for each goal to be entered. Enter a Description and Category. Link the organizations that have access to the goal. When all desired goals have been entered click the Save button.


CaseWorthy
Megan Jansky-Bingel
Goals
Manage Categories
Add New
Setup
Administration
Codes and Categories
Issues/Health
Financials/Documents
Goals/Outcomes
Time/Inventory
Test/Job/Skills
Add Zip Codes
Program Data Management
Reporting
Goal Category
Goal Description *
Goal Category
Organizations
System ID
Safe, stable, affordable housing
Housing
All
None
Choose Options...
CaseWorthy
Catholic Charities
$50 savings
Financial
All
49
Ability to follow rules and instructions.
HS Health Status and Practices
All
63
Ability to give and take in situations. (Sharing)
HS Cooperation
All
72
Acquire GED
Education
All
51
Save
Cancel

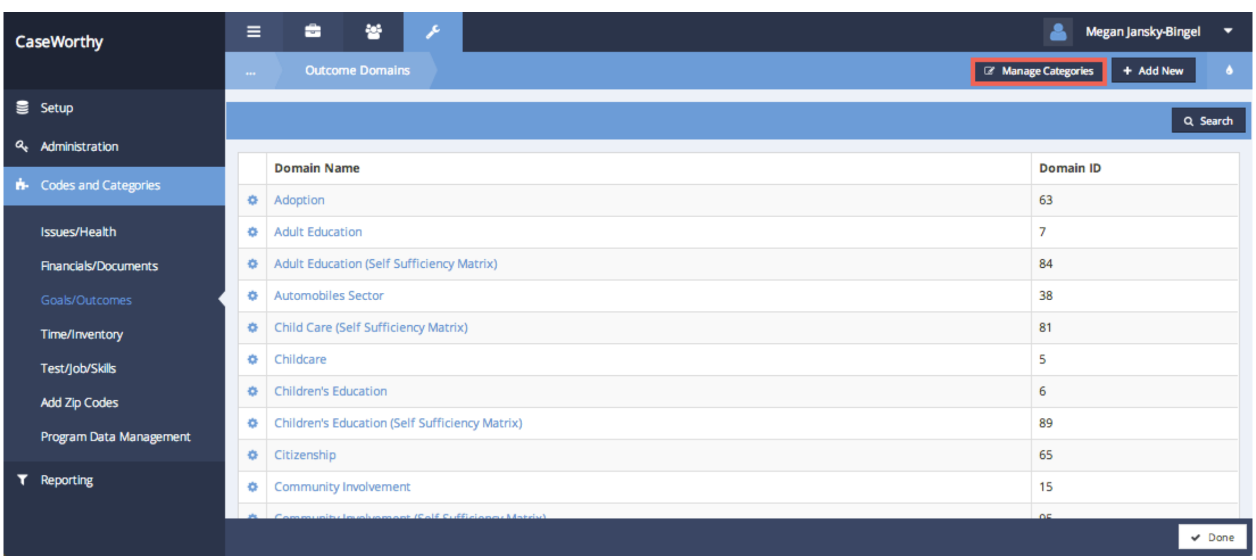
Outcomes

(Administration>Codes and Categories>Goals/Outcomes>Outcomes)

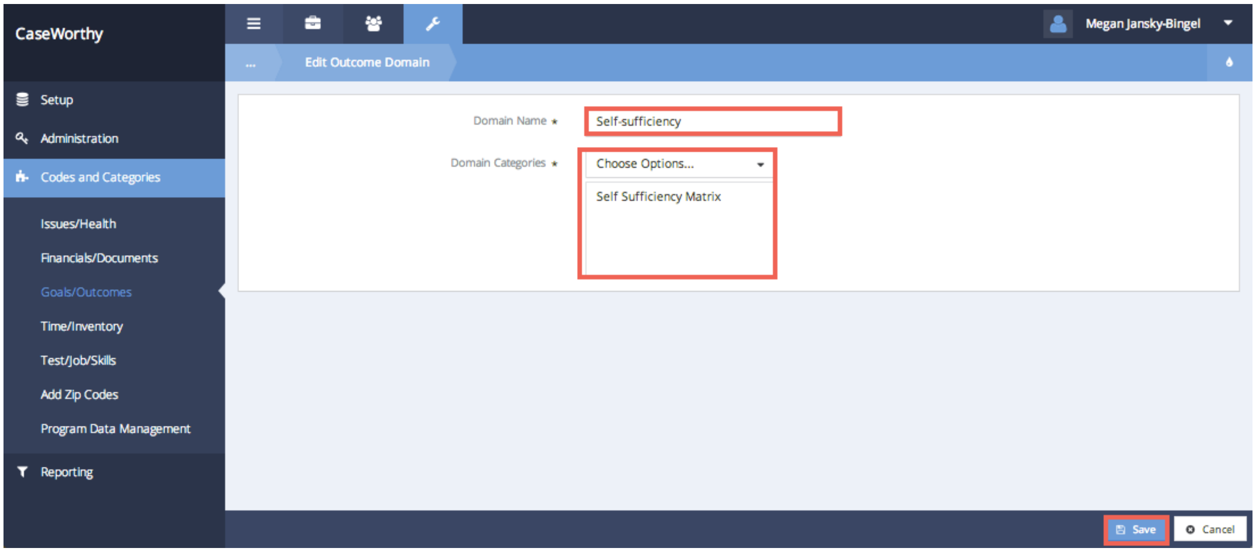
The Outcomes area allows system administrators to customize the outcomes linked to programs and accessible to users. For more information, refer to the Linking Outcomes to Programs area of this manual. To access the Outcomes set up area, select the Outcomes icon on the Goals / Outcomes dashboard.



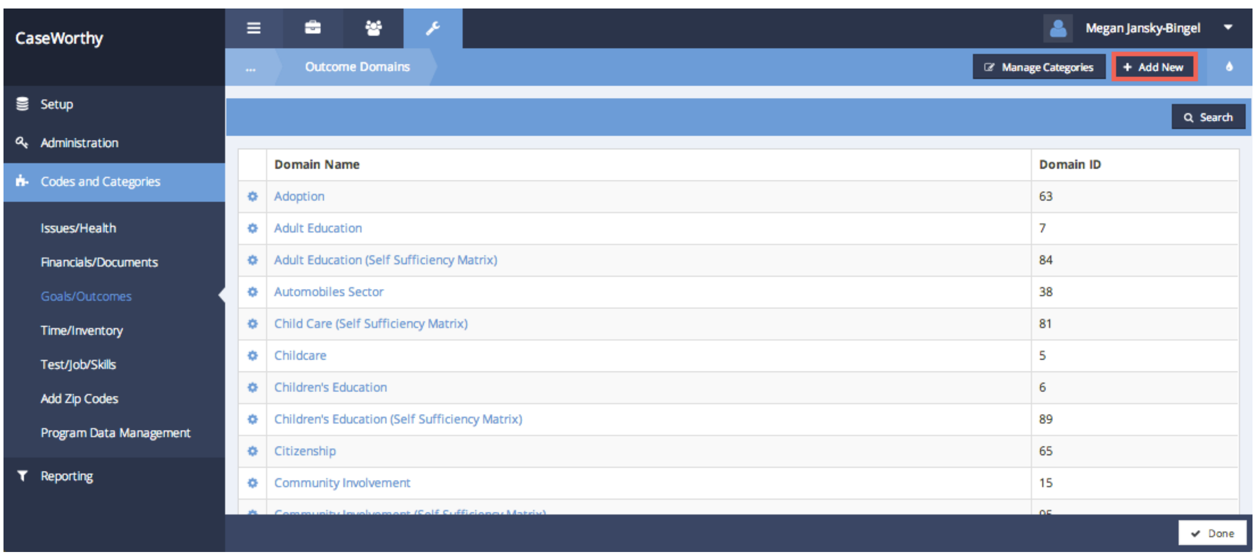
On the Outcome Domains form, access the outcome categories by clicking the Manage Categories button on the top right.



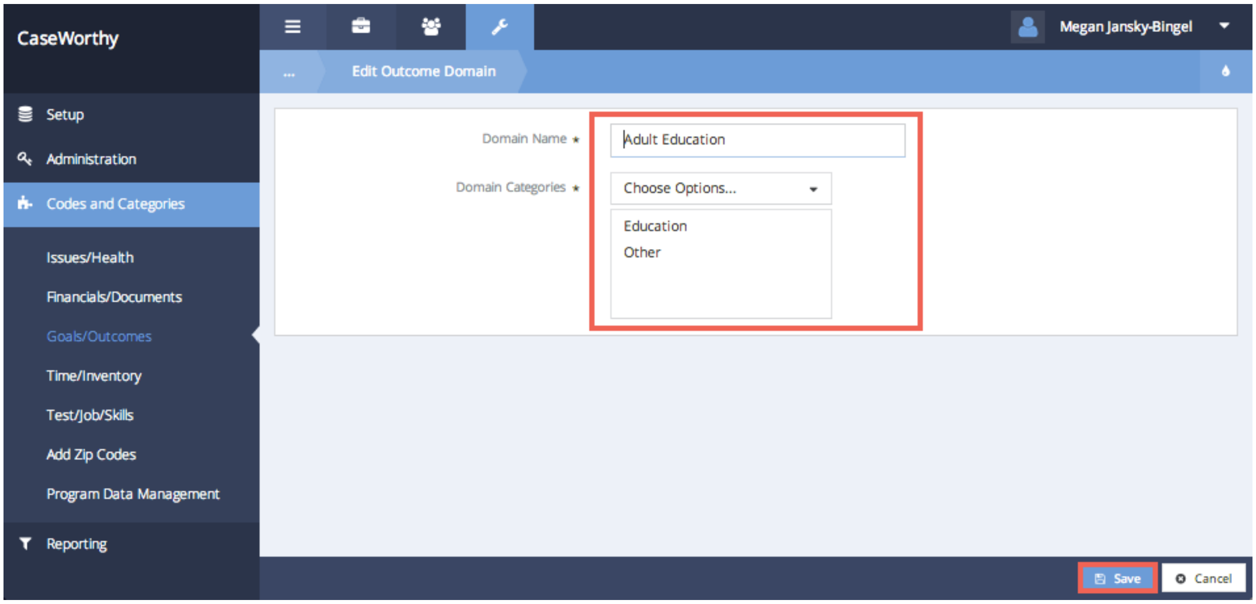
To add an outcome category, click the + Add Row button. Add a row for each category to be entered. Enter the category description. Click Save when all desired categories have been entered.



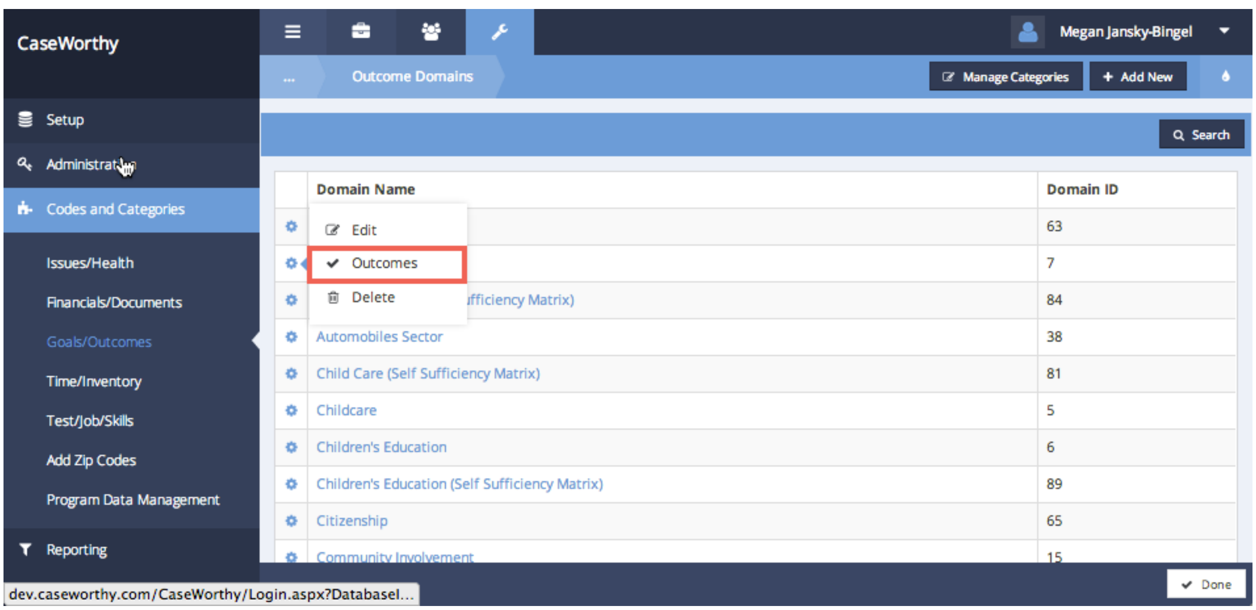
The Outcome Domains summary form displays. To add an outcome domain, click the **+ Add New** button. The Edit Outcome Domain form appears.



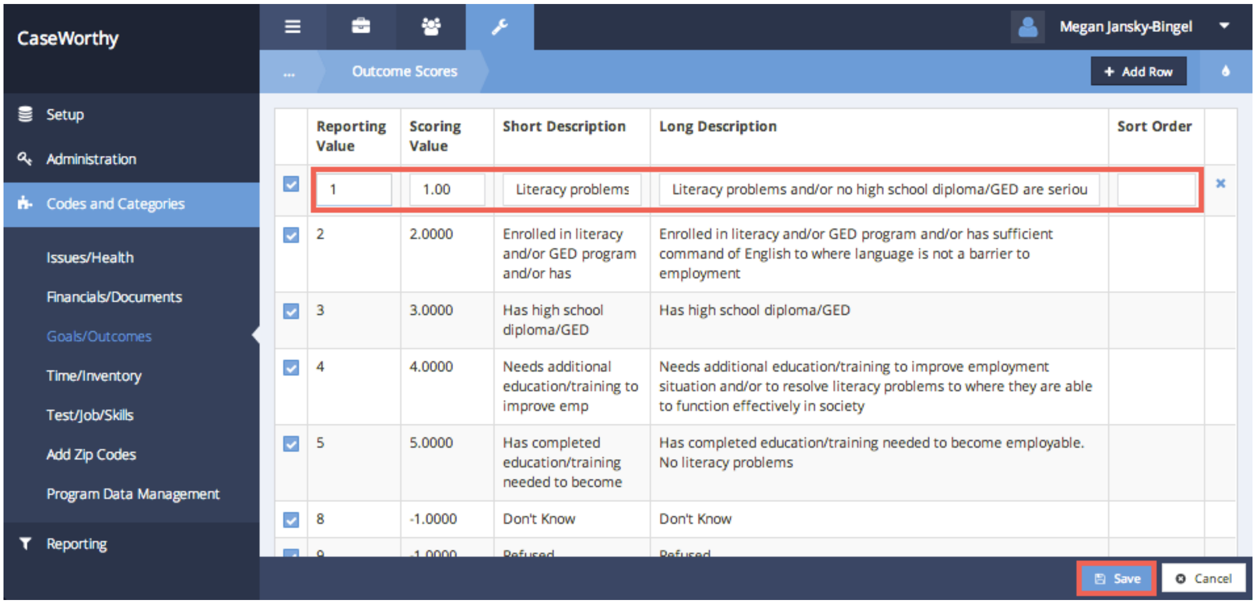
Enter a Domain Name and relevant Domain Category or categories. When the desired outcome domain has been entered click the **Save** button.



The Outcome Domains form displays. To add outcome scores or measures, click the action gear next to the desire domain and select “Outcomes”.



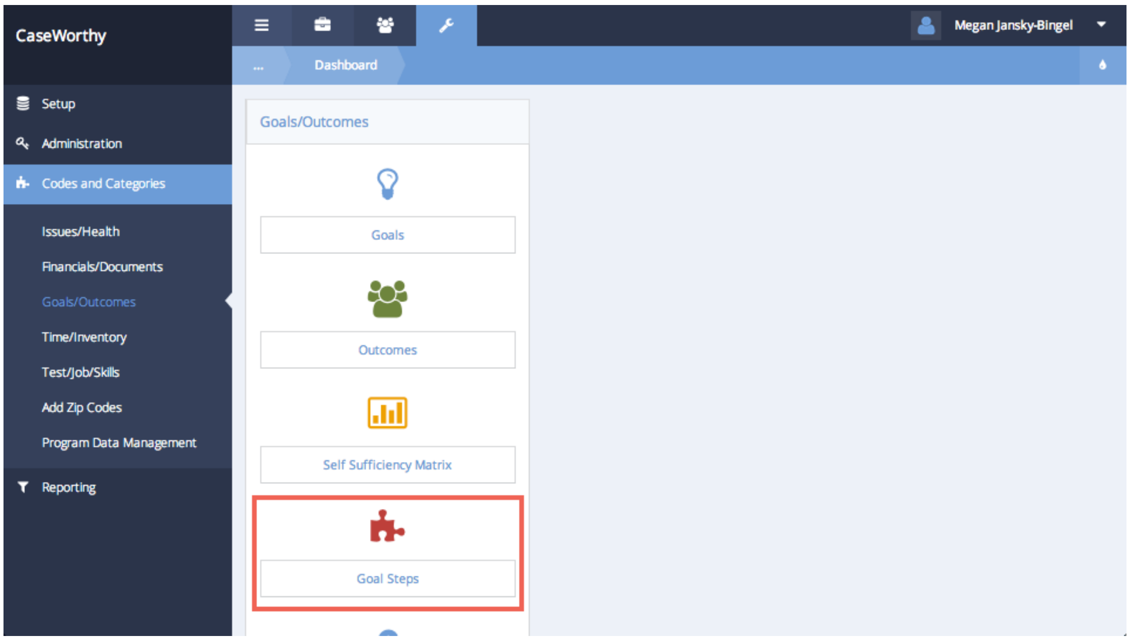
The Outcome Scores form displays. To enter outcome scores, click the + Add Row button. Add a row for each outcome score to be entered. Enter a Reporting Value, Score, Short Description, and Long Description. When all desired outcome scores have been entered click the Save button.



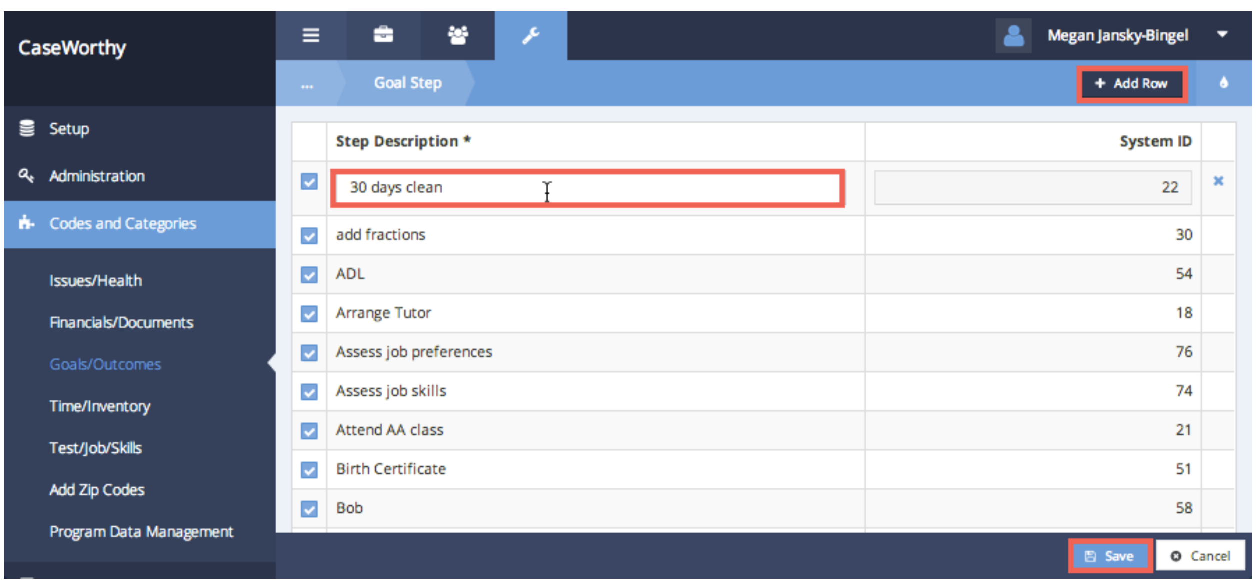
Goal Steps

(Administration>Codes and Categories>Goals/Outcomes>Goal Steps)

The Goal Steps area allows system administrators to customize the goal steps list that can be linked to goals and accessible to users. To learn more about linking Goals and Goal Steps refer to the Mappings>Goal Mappings area of this manual. To access the Goal Steps set up area, select the Goal Steps icon on the Goals / Outcomes dashboard.



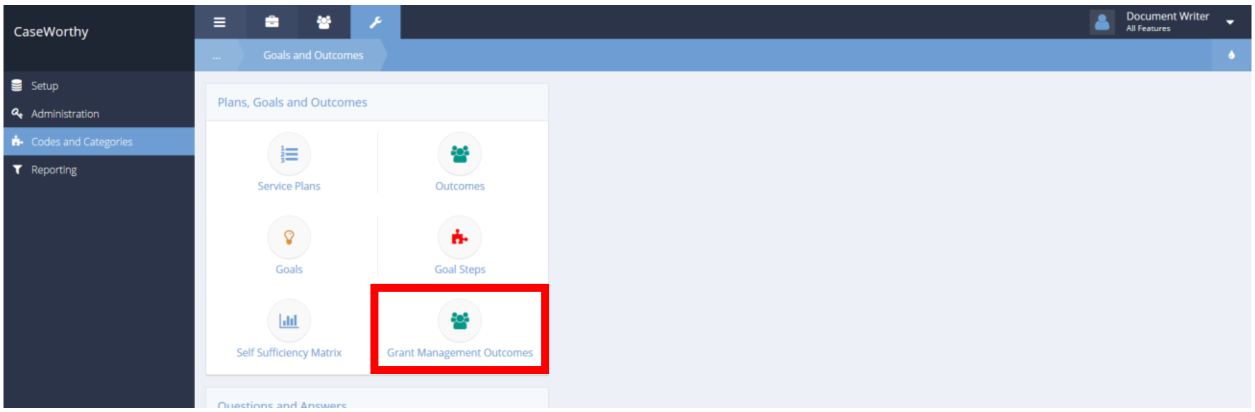
The Goal Steps area allows system administrators to customize the goal steps list that can be linked to goals and accessible to users. To learn more about linking Goals and Goal Steps refer to the Mappings>Goal Mappings area of this manual. To access the Goal Steps set up area, select the Goal Steps icon on the Goals / Outcomes dashboard.



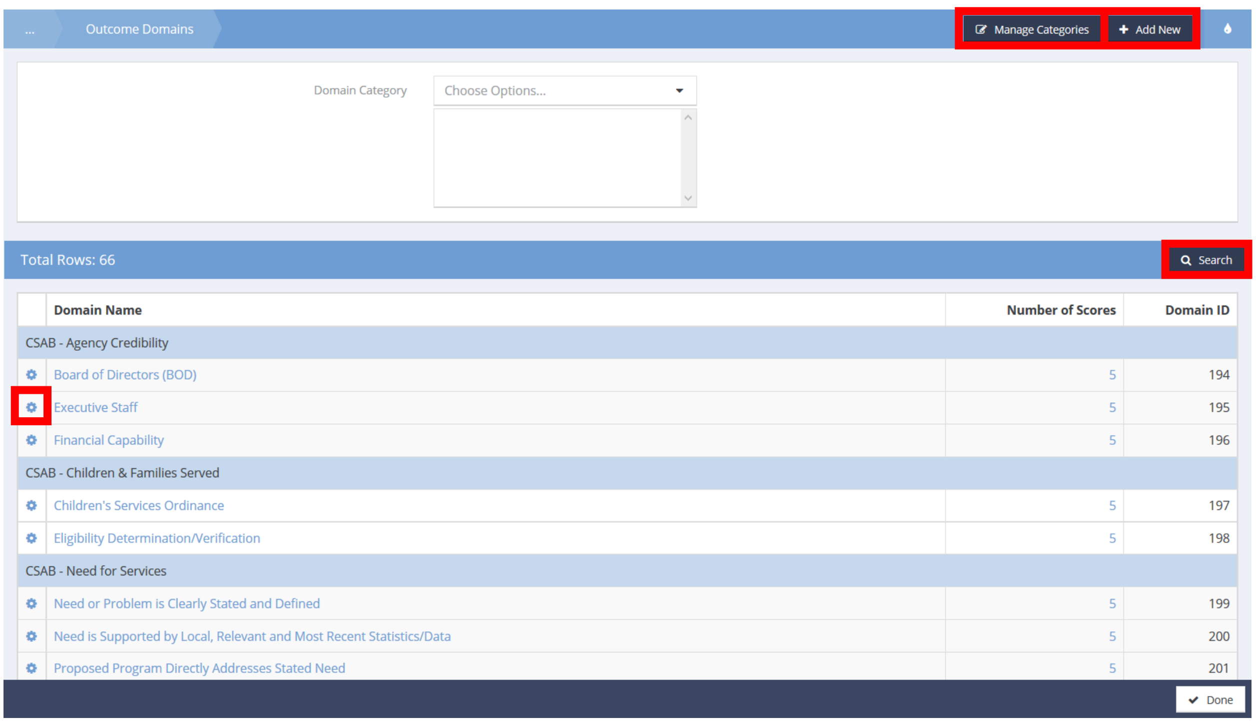
Grant Management Outcomes

Objective: Manage Outcome Domains.

Navigation: Administration>Codes and Categories>Plans, Goals and Outcomes



Select Grant Management Outcomes from the Plans, Goals and Outcomes dashboard. The Outcome Domains form displays.



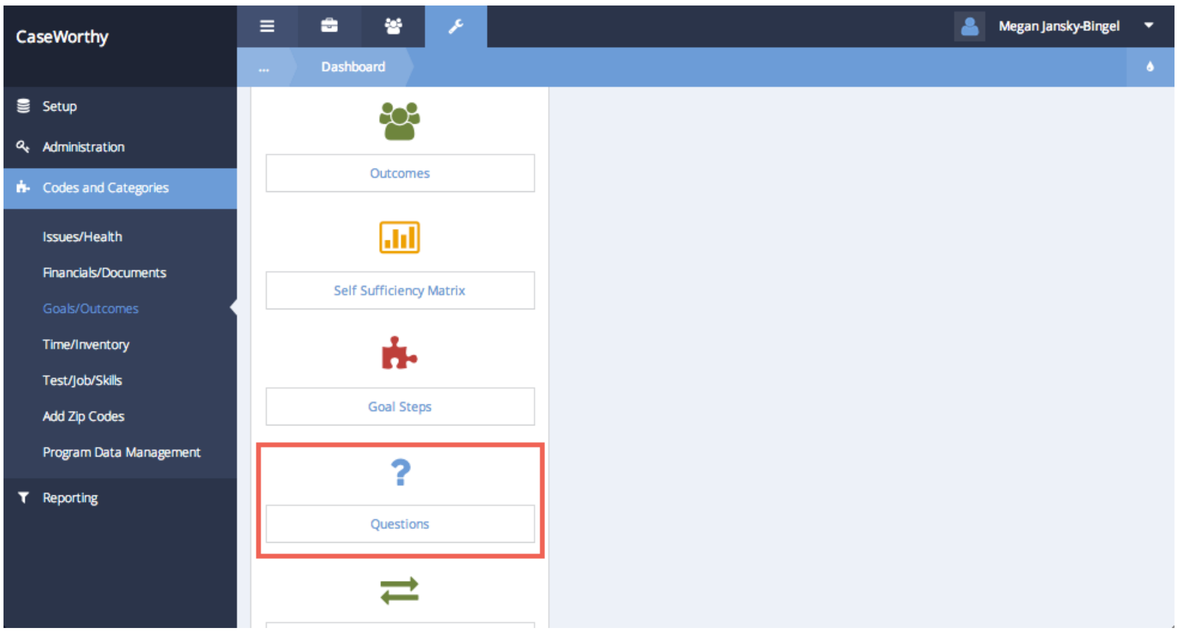
Outcome domains display. Filter results by using the Domain Category drop down list to select categories to search by. Click the Search button to populate results. To add new domain, click the Add New button. To manage categories, click the Manage Categories button. Click the action gear icon associated with the desired domain to Edit, view Outcomes, or Delete, by selecting the appropriate menu option. Click the Done button when finished.

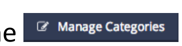
Questions

(Administration>Codes and Categories>Goals/Outcomes>Questions)

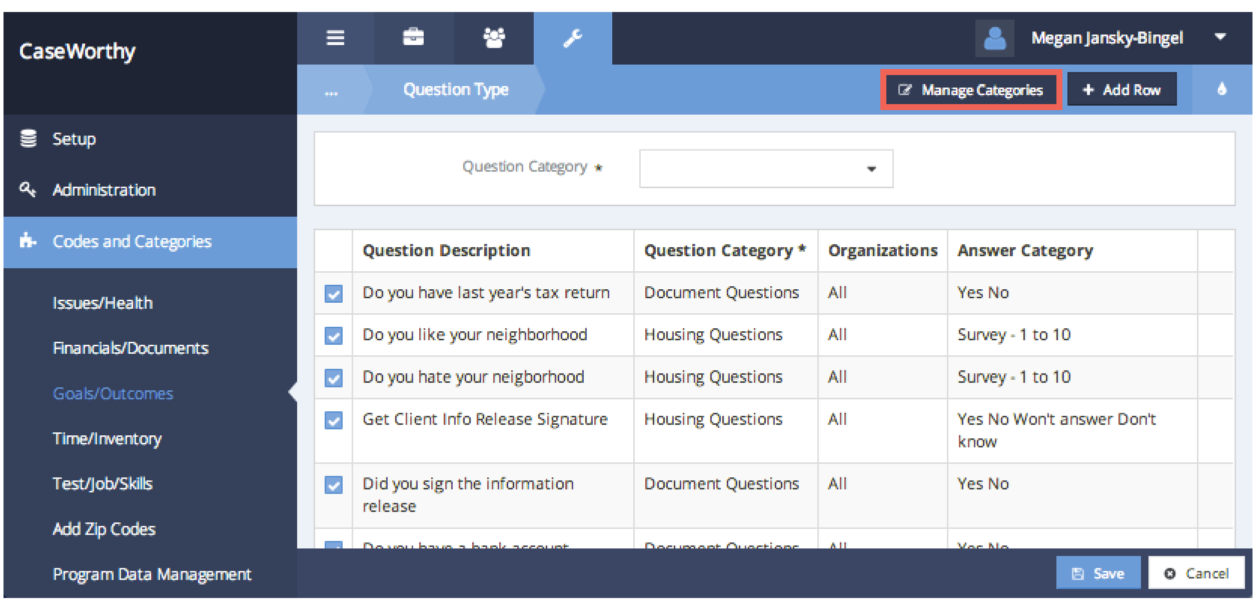
NOTE: ***The Answers area must be set up before creating Questions.***

The Questions area allows system administrators to customize survey or other program related questions that can be linked to answers and accessible to users. To access the Questions set up area, select the Questions icon on the Goals / Outcomes dashboard.

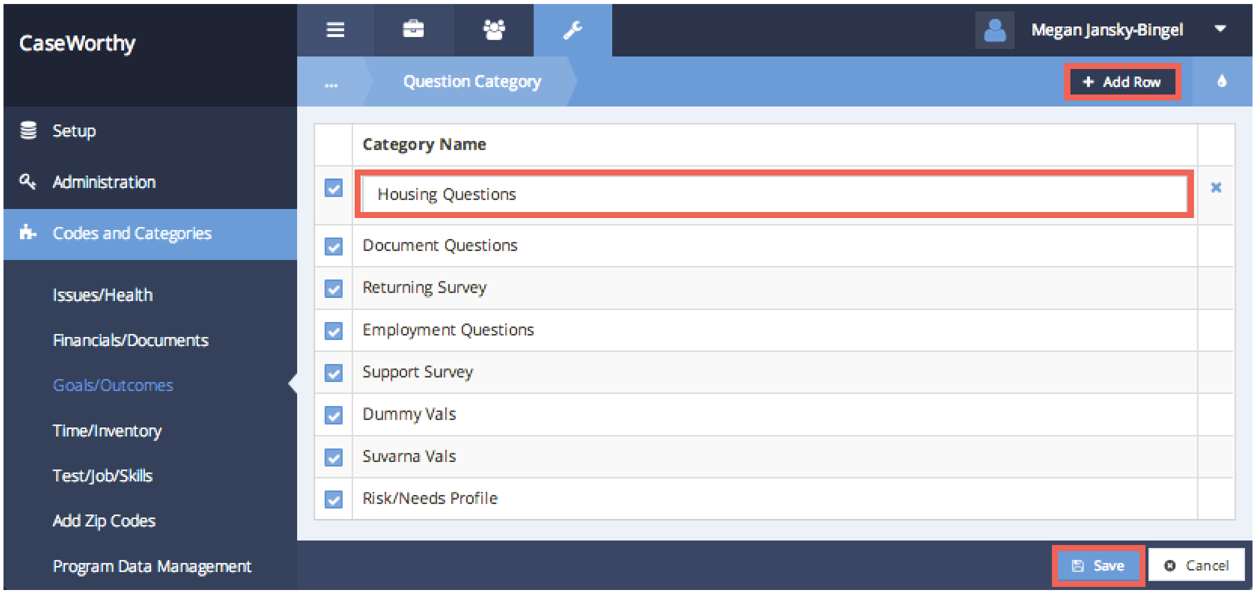


On the Question Type form, access the question categories by clicking the 

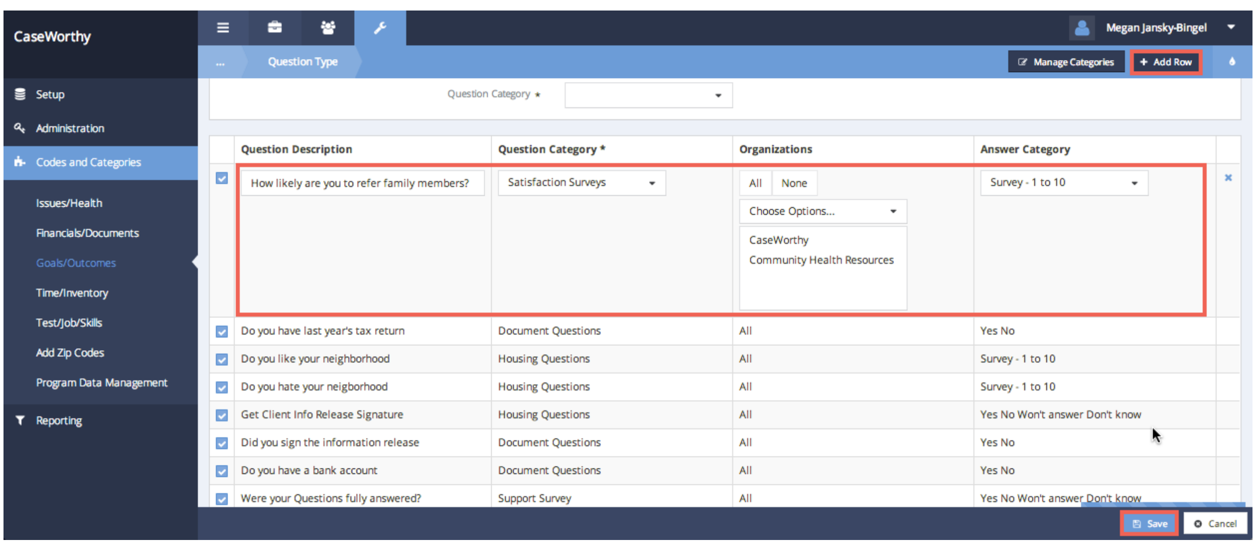
button on the top right.



The Question Category form displays. To add a question category, click the + Add Row button. Add a row for each question category to be entered. Enter the category description. Click Save when all desired question categories have been entered.



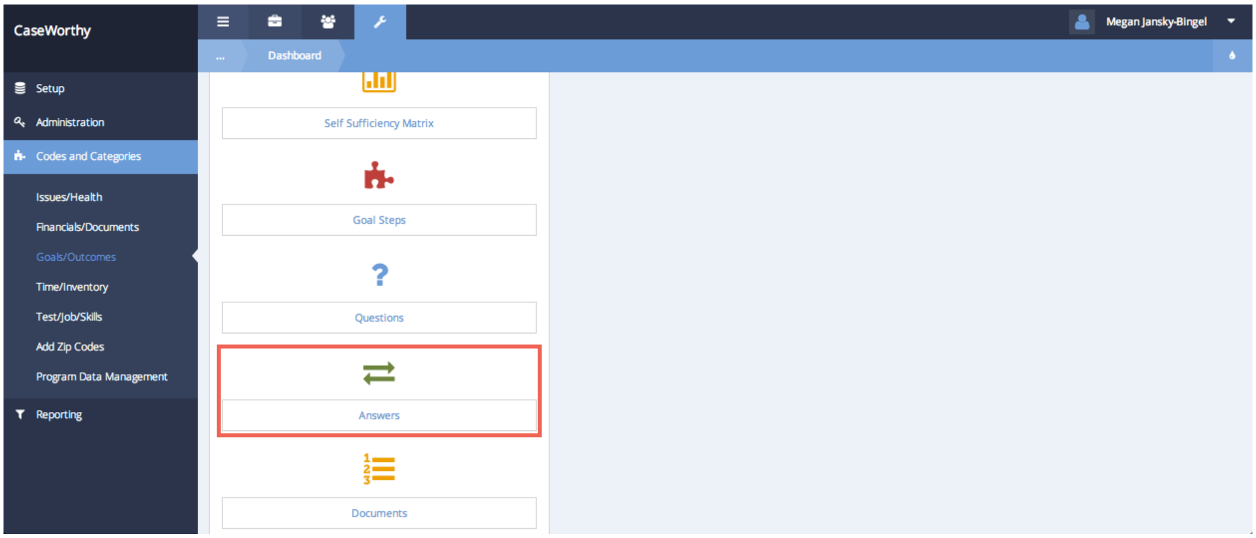
The Question Type form displays. To add a question, click the + Add Row button. Add a row for each question to be entered. Enter a Description, Question Category an Answer Category. Link the organizations that should have access to the question. When all desired questions have been entered click the Save button.



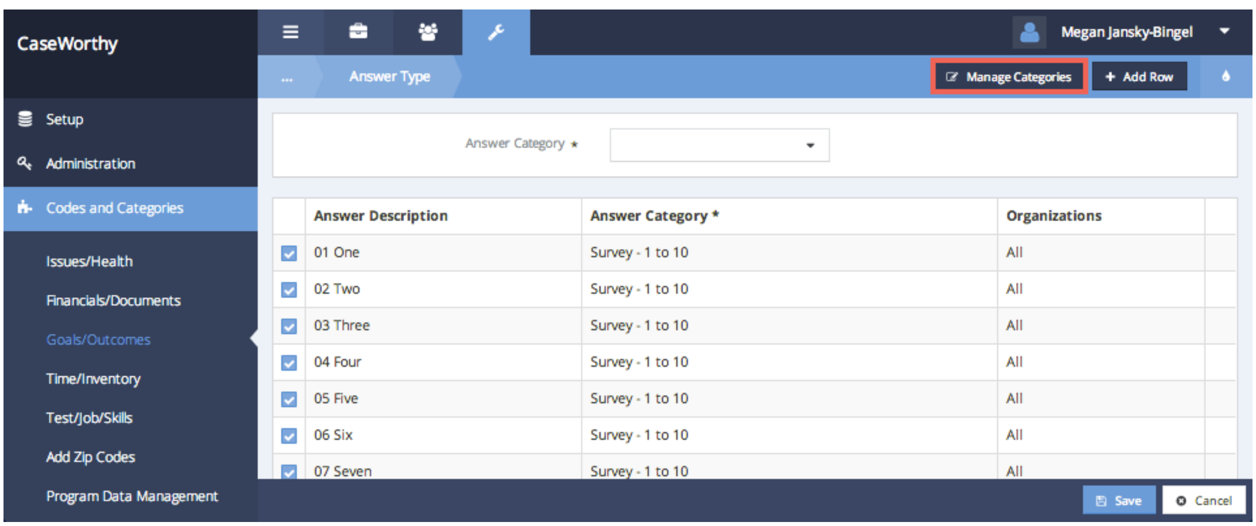
Answers

(Administration>Codes and Categories>Goals/Outcomes>Answers)

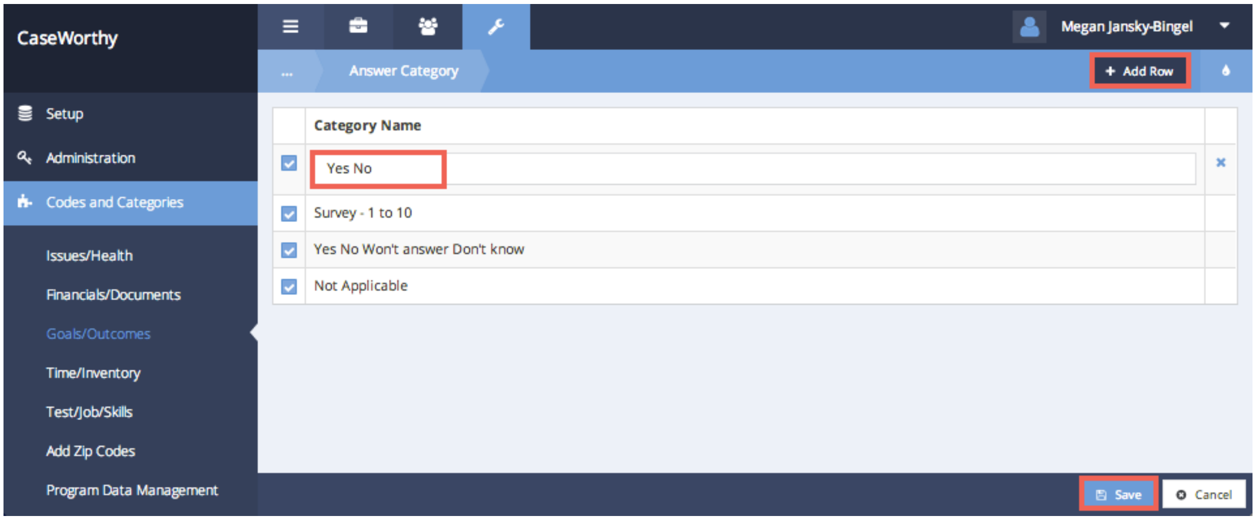
The Answers area allows system administrators to customize answers to survey questions or other program related questions that can be linked to programs accessible to users. For more information on linking Questions and Answers to programs, refer to the Mappings>Program Mappings section of this manual. To access the Answer set up area, select the Answers icon on the Goals / Outcomes dashboard.



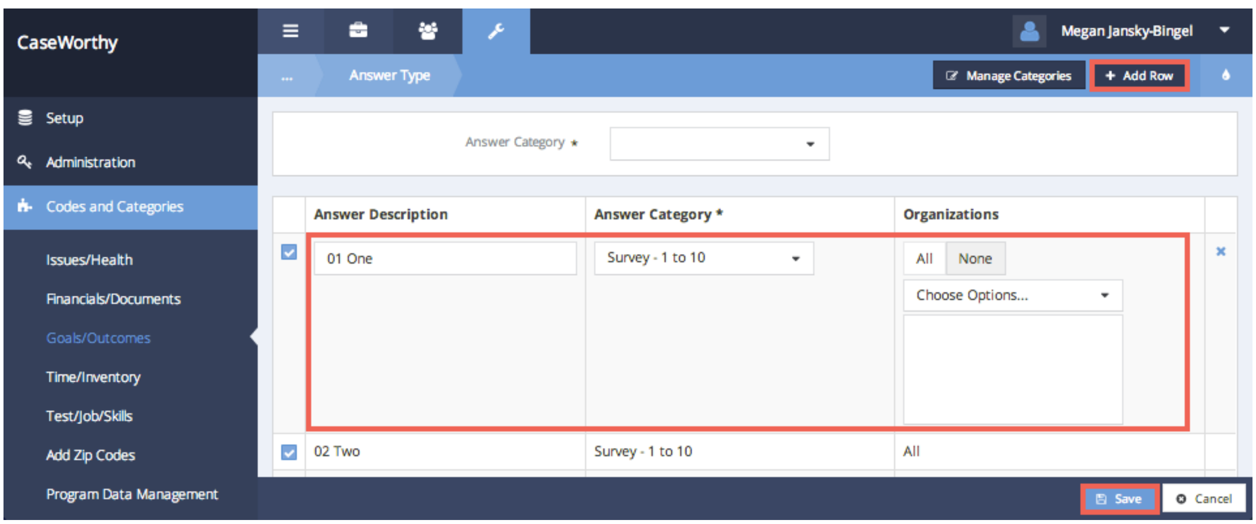
On the Answer Type form, access the answer categories by clicking the Manage Categories button on the top right.



The Answer Category for displays. To add an answer category, click the Add Row button. Add a row for each answer category to be entered. Enter the category description. Click Save when all desired Answer categories have been entered.



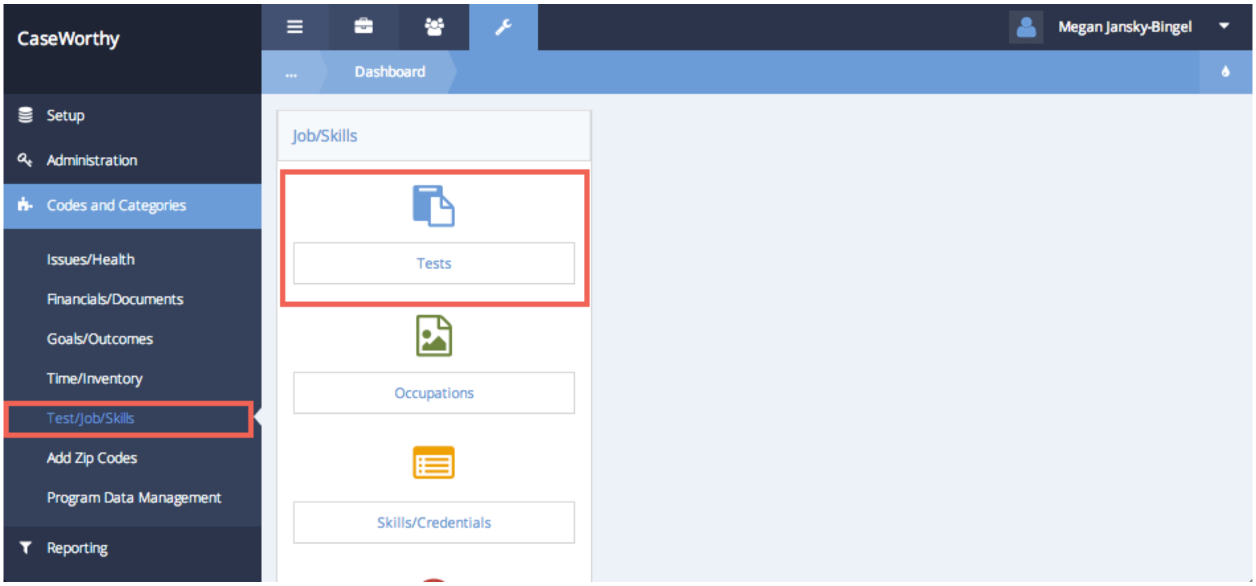
The Answer Type form displays. To add an answer, click the + Add Row button. Add a row for each answer to be entered. Enter a Description and Category. Link all organizations that should have access to the answer. When all desired answers have been entered click the Save button.



Test/Job/Skills

(Administration>Codes and Categories>Test/Job/Skills)

The Test, Job, and Skills area of the Codes and Categories menu allows system administrators to customize the Tests, Occupations, Skills/Credentials, Courses and Job Codes lists in CaseWorthy™.

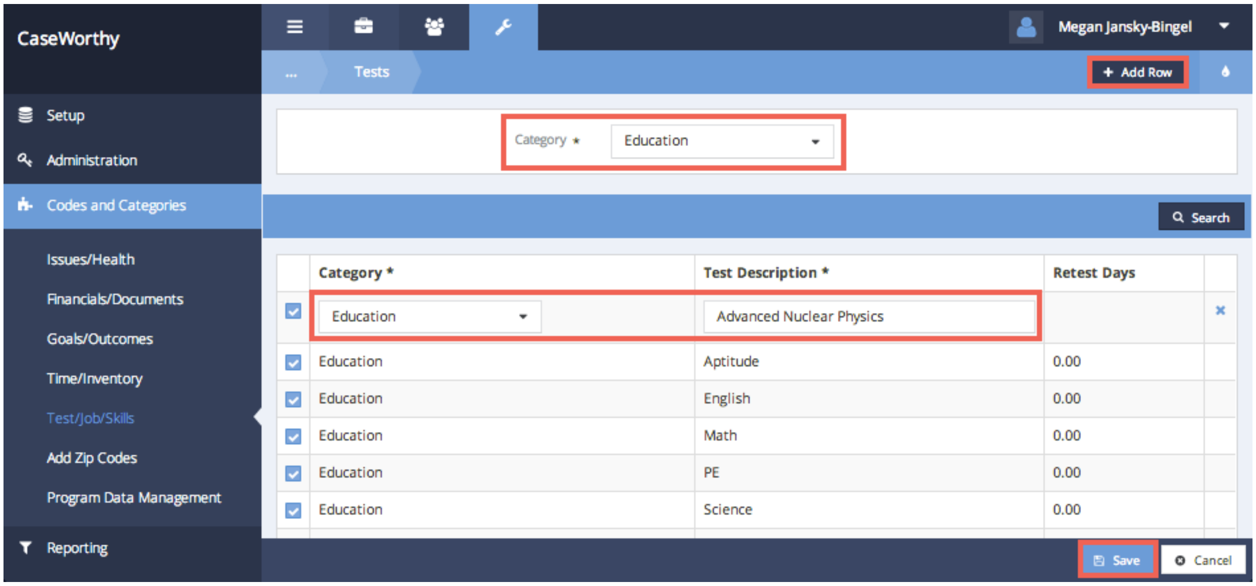


Tests

(Administration>Codes and Categories>Test/Job/Skills>Tests)

The Tests area allows system administrators to customize the Tests list that is accessible to users. To access the Tests set up area, select the Tests icon on the Test/Job/Skills dashboard.

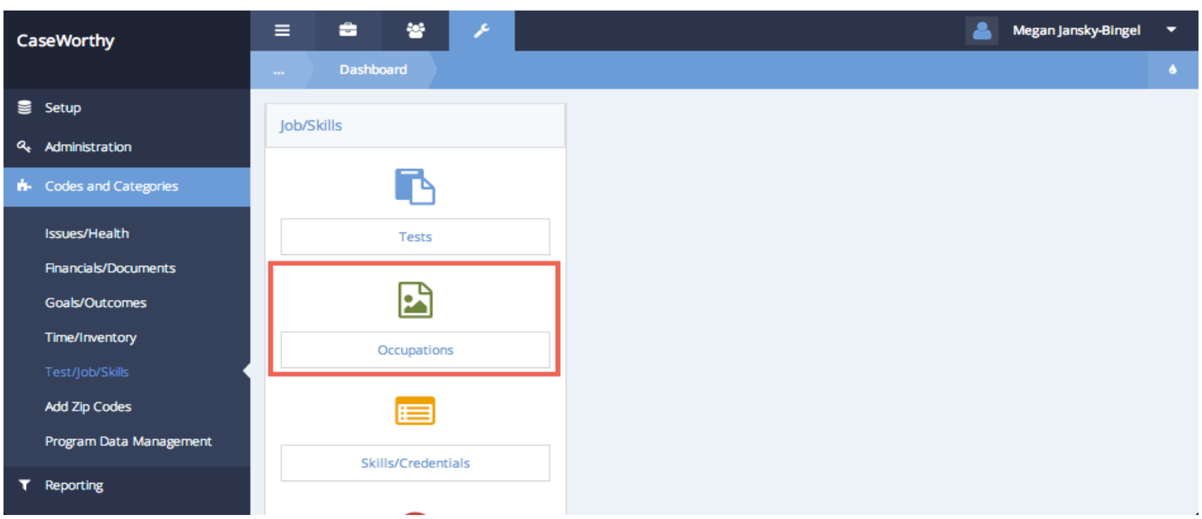
The Tests form displays. To customize a test list, select the desired test list type (Education, Drug Screening, Medical, etc.) To add a Test, click the + Add Row button. Add a row for each test to be entered. The Category defaults, based on the selection made at the top of the screen. Enter a Test Description. If the category is Drug Screening, enter the number of days that must pass to re-test. When all desired tests in the selected category have been entered click the Save button. To enter Tests for another category type, repeat the steps above after selecting the next desired category type.



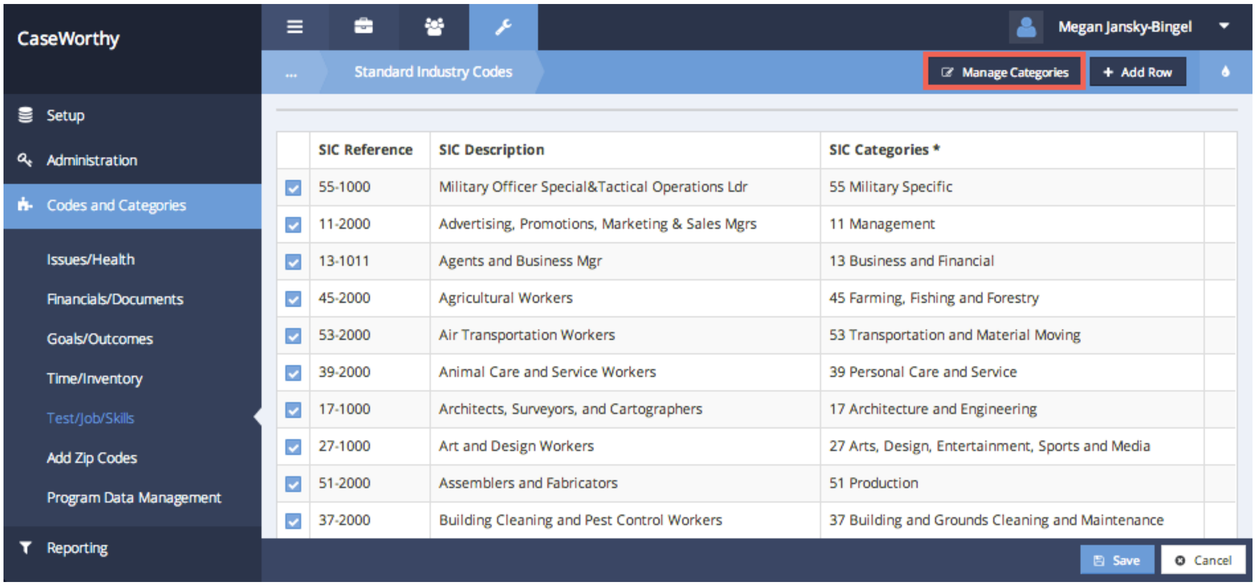
Occupations

(Administration>Codes and Categories>Test/Job/Skills>Occupations)

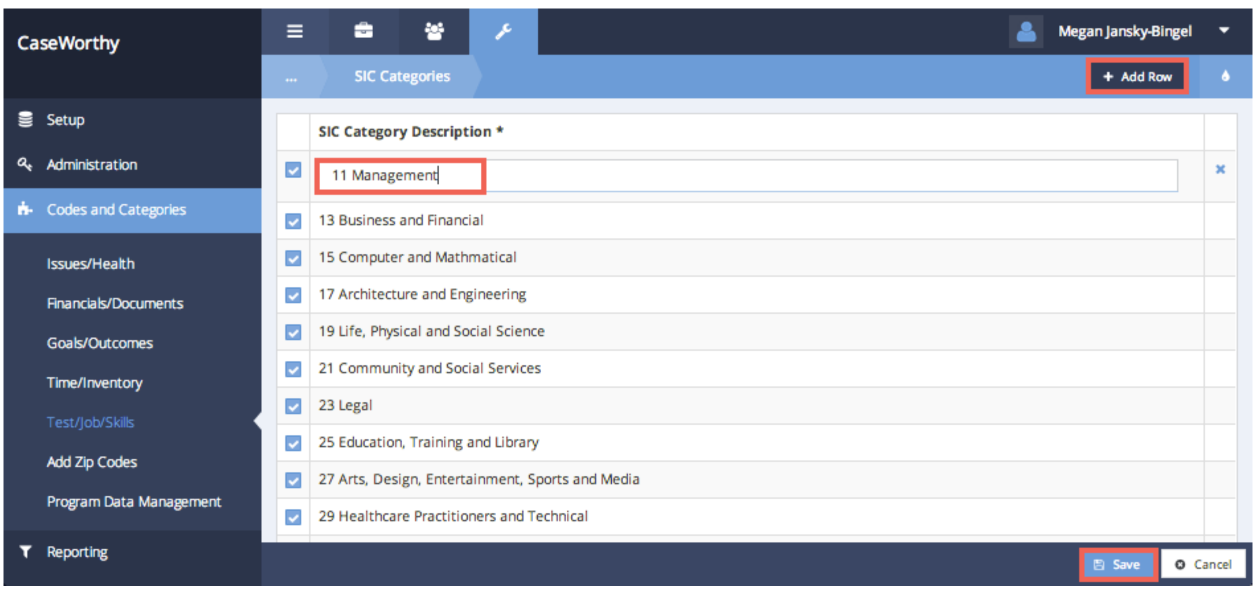
The Occupations area allows system administrators to customize the list of occupations accessible to users. To access the Occupations set up area, select the Occupations icon on the Test/Job/Skills dashboard.



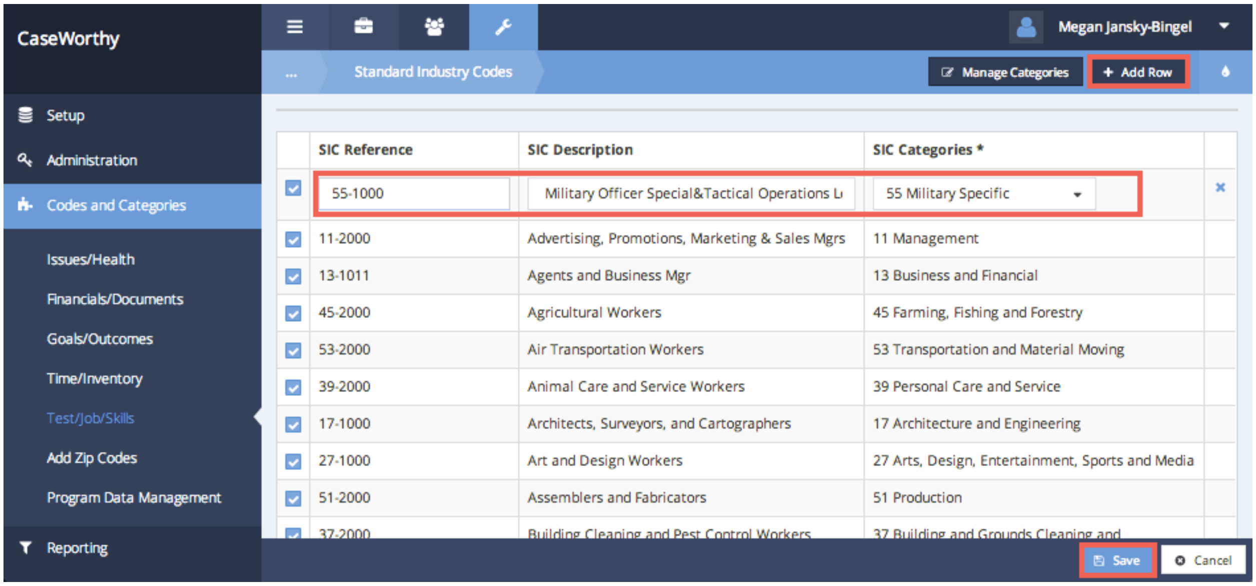
On the Standard Industry Codes form, access the occupations categories by clicking the Manage Categories button on the top right.



The SIC Categories form displays. To add a category, click the + Add Row button. Add a row for each SIC category to be entered. Enter the category description. Click Save when all desired SIC categories have been entered.



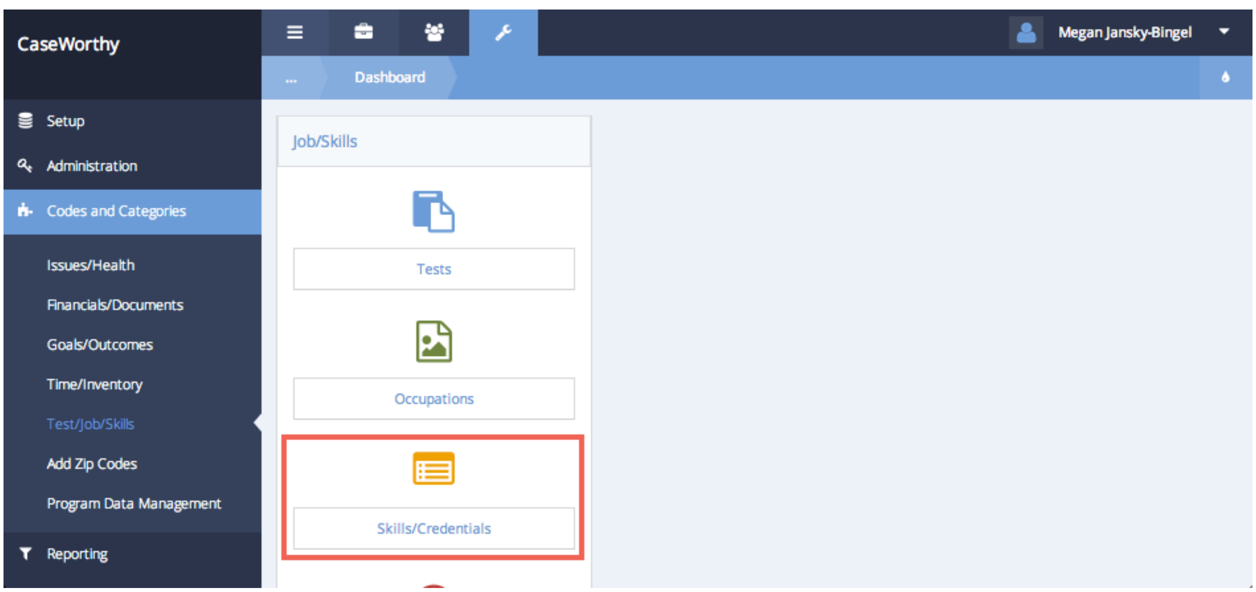
The Standard Industry Codes form displays. To add an SIC, click the + Add Row button. Add a row for each SIC to be entered. Enter the SIC Reference code, Description and select a Category. When all desired SIC's have been entered click the Save button.



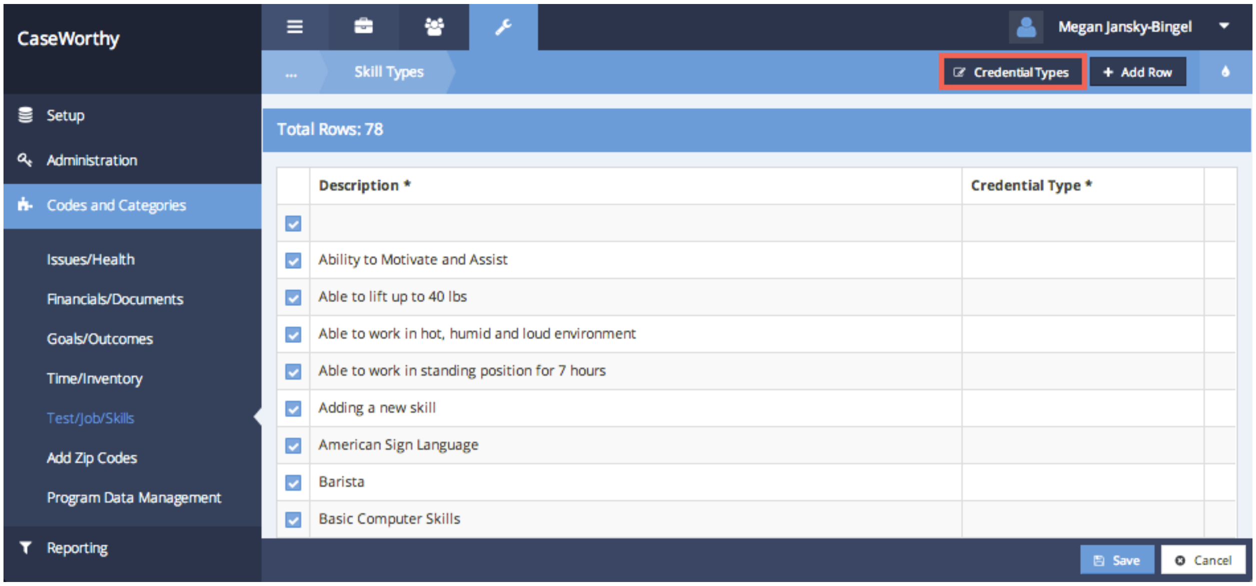
Skills/Credentials

(Administration>Codes and Categories>Test/Job/Skills>Skills/Credentials)

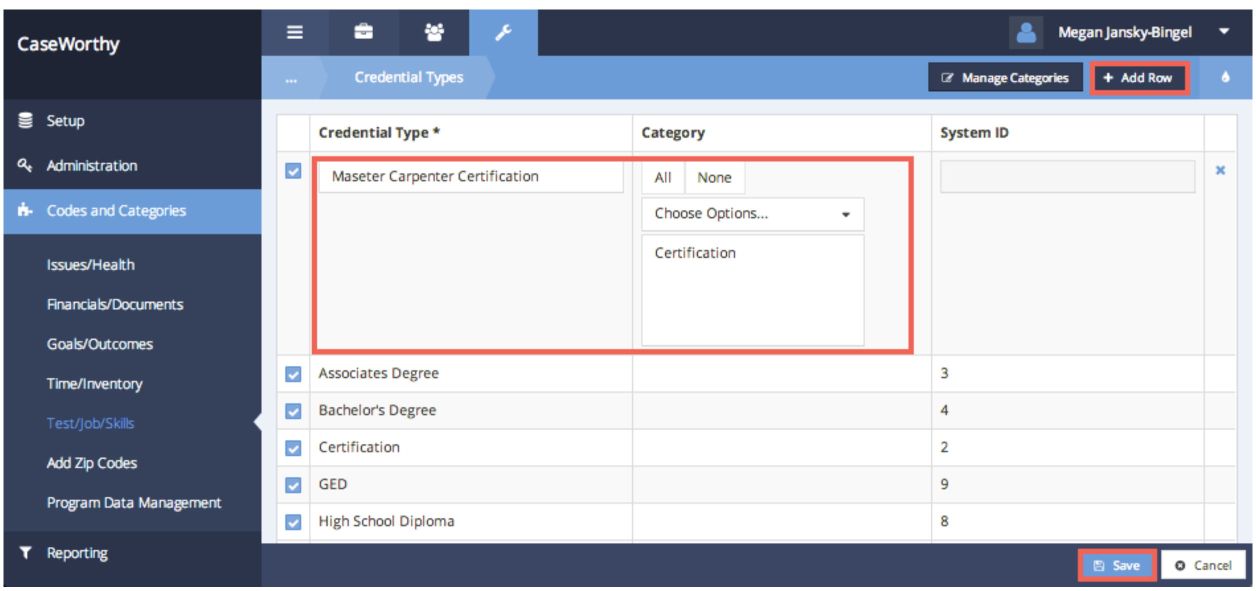
The Skills/Credentials area allows system administrators to customize the list of skills and credentials accessible to users. To access the Skills/Credentials set up area, select the Skills/Credentials icon on the Test/Job/Skills dashboard.



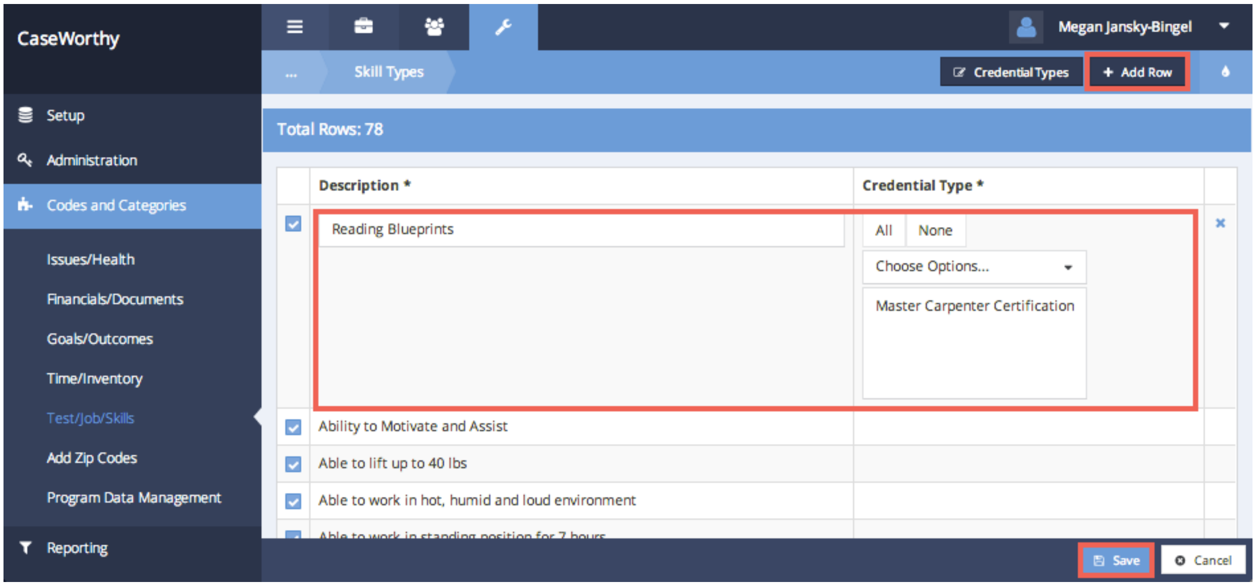
On the Skill Types form, access the credential types by clicking the Credential Types button on the top right.



The Sill Type Categories form displays. To add a credential, click the + Add Row button. Add a row for each credential to be entered. Enter the credential description. Click Save when all desired credentials have been entered.



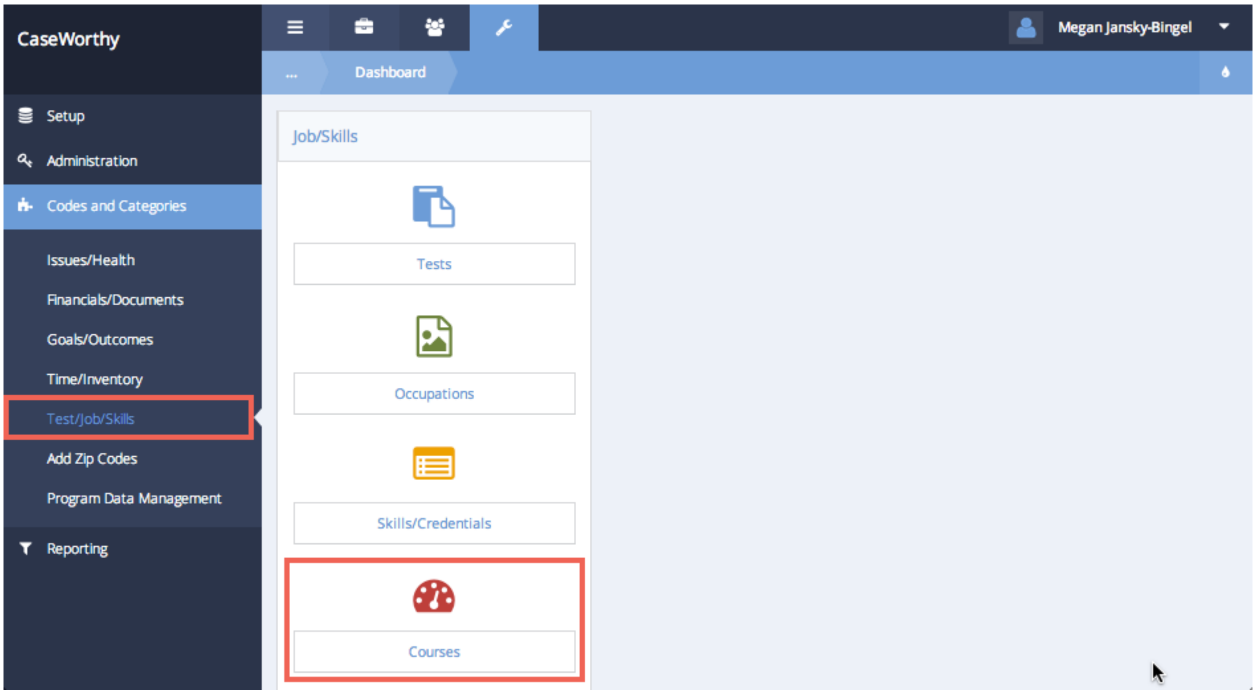
The Skills Type form displays. To add a skill type, click the + Add Row button. Add a row for each skill to be entered. Enter a Description and select a Credential type. When all desired skills have been entered click the Save button.


CaseWorthy
Megan Jansky-Bingel
Skill Types
Credential Types
+ Add Row
Setup
Administration
Codes and Categories
Issues/Health
Financials/Documents
Goals/Outcomes
Time/Inventory
Test/Job/Skills
Add Zip Codes
Program Data Management
Reporting
Total Rows: 78
Description *
Credential Type *
Reading Blueprints
All
None
Choose Options...
Master Carpenter Certification
Ability to Motivate and Assist
Able to lift up to 40 lbs
Able to work in hot, humid and loud environment
Save
Cancel

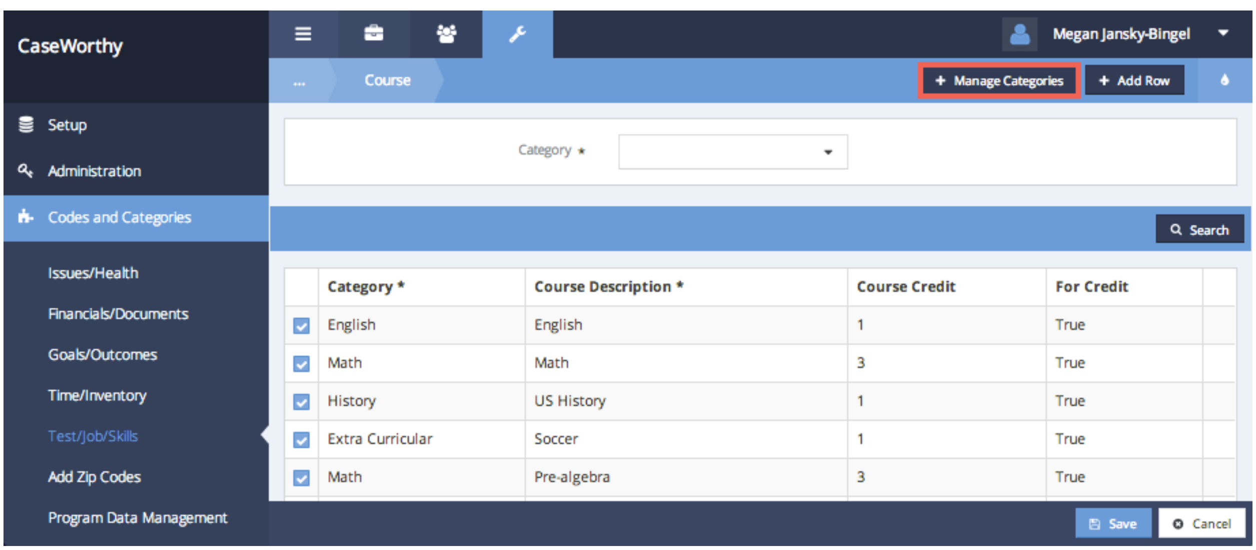
Courses

(Administration>Codes and Categories>Test/Job/Skills>Courses)

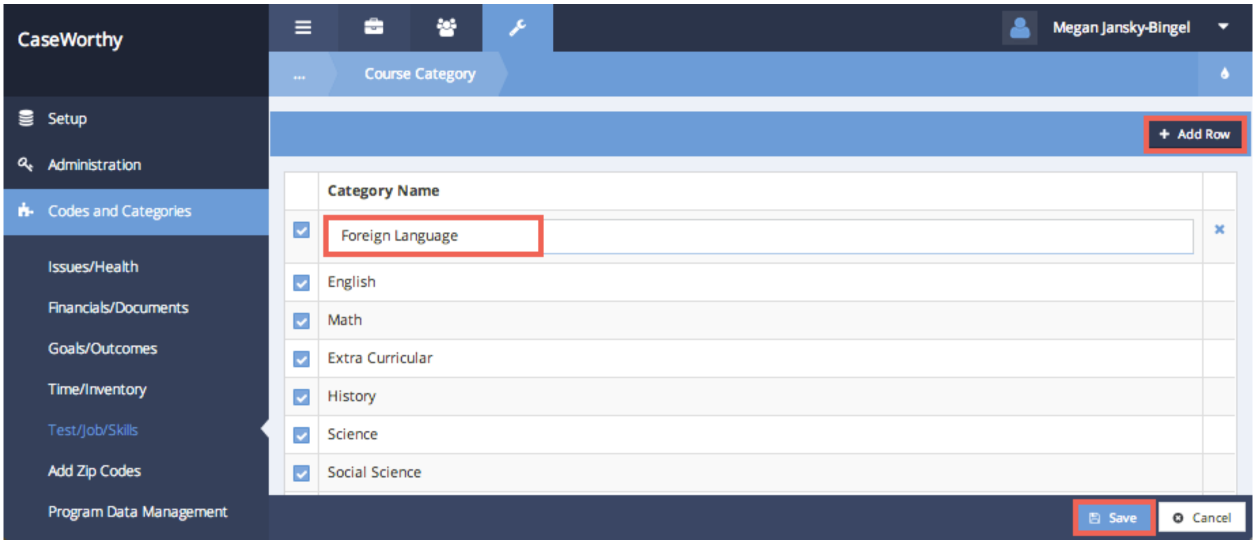
The Courses area allows system administrators to customize the list of courses accessible to users. To access the Courses set up area, select the Courses icon on the Tests/Job/Skills dashboard.



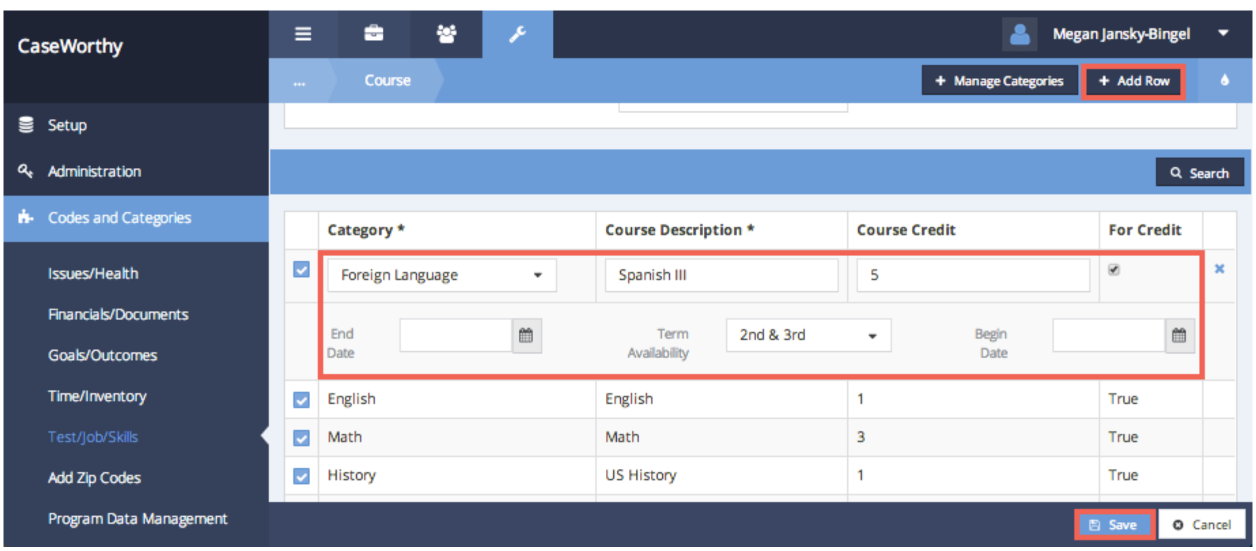
On the Course form, access the Couse categories by clicking the Manage Categories button on the top right.



The Course Category form displays. To add a course category, click the + Add Row button. Add a row for each category to be entered. Enter the category name. Click Save when all desired categories have been entered.



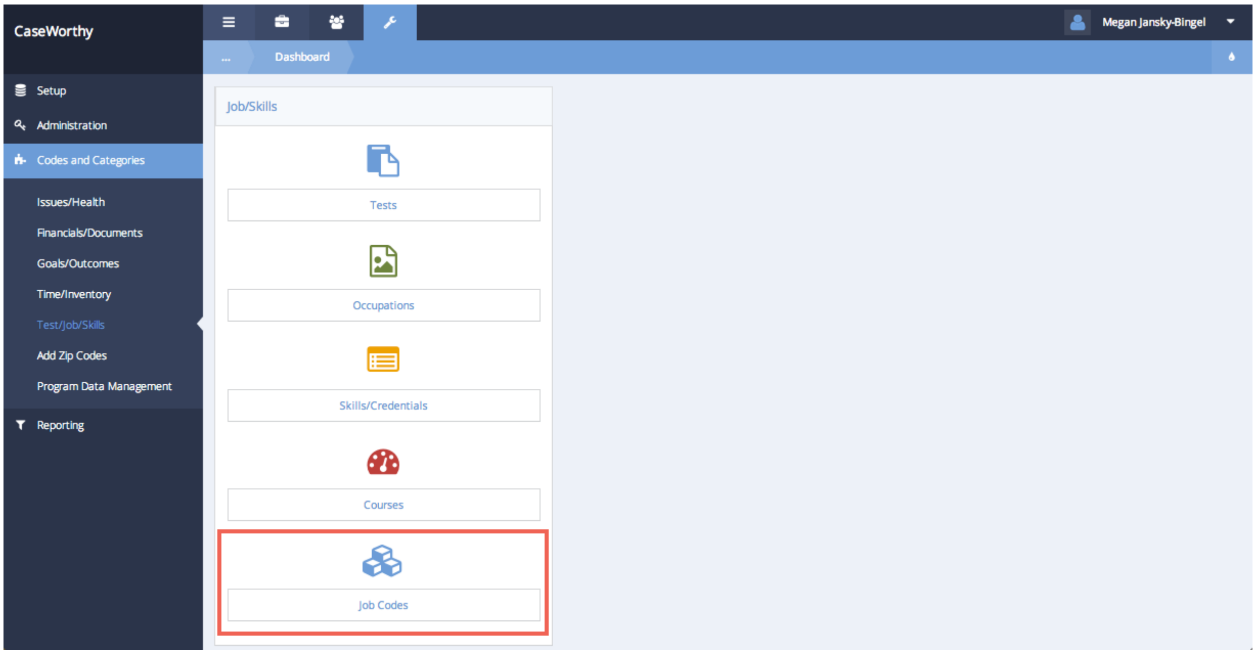
The Course form displays. To add a course, click the + Add Row button. Add a row for each course to be entered. Enter a Category, Description, and Course Credit information. Enter Term Availability, Begin Date and/or End Date as applicable. When all desired courses have been entered click the Save button.



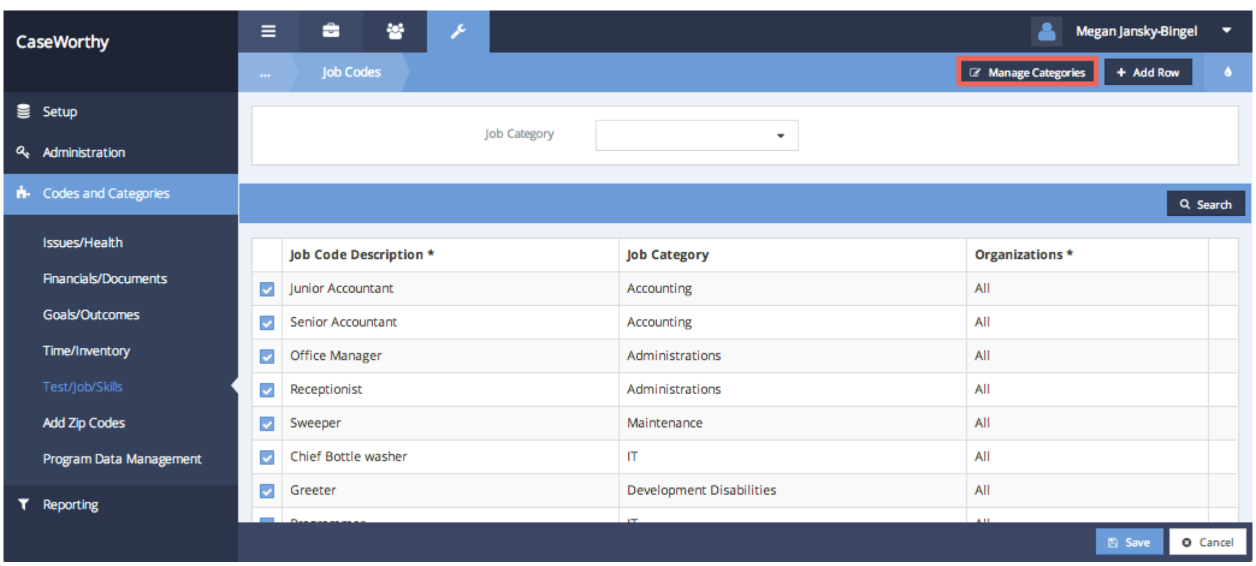
Job Codes

(Administration>Codes and Categories>Test/Job/Skills>Job Codes)

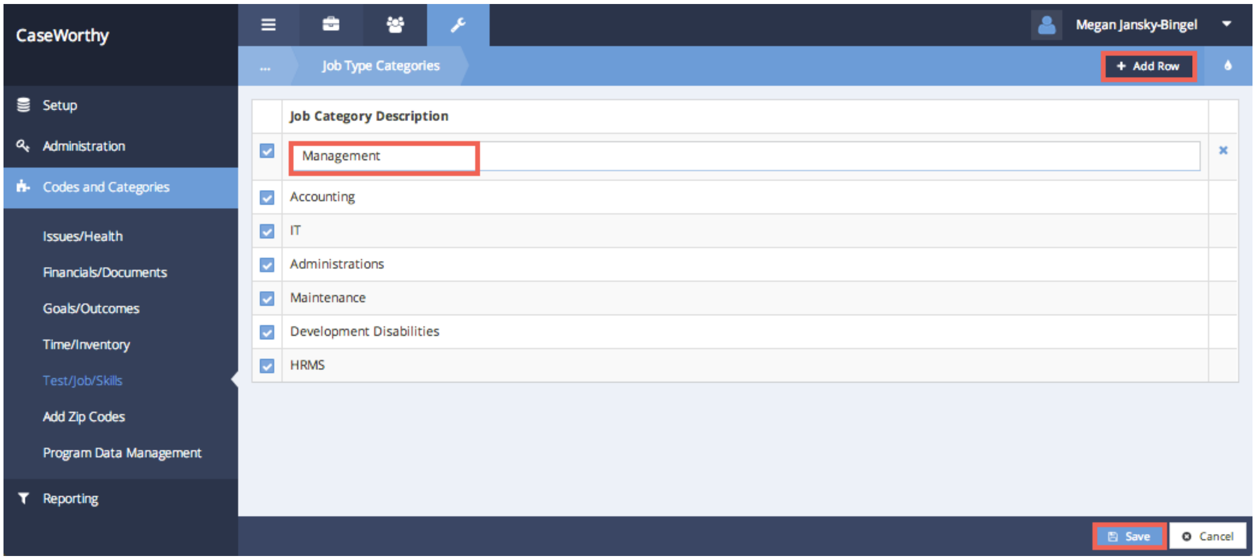
The Job Codes area allows system administrators to customize the list of job codes accessible to users. To access the Job Codes set up area, select the Job Codes icon on the Tests/Job/Skills dashboard.



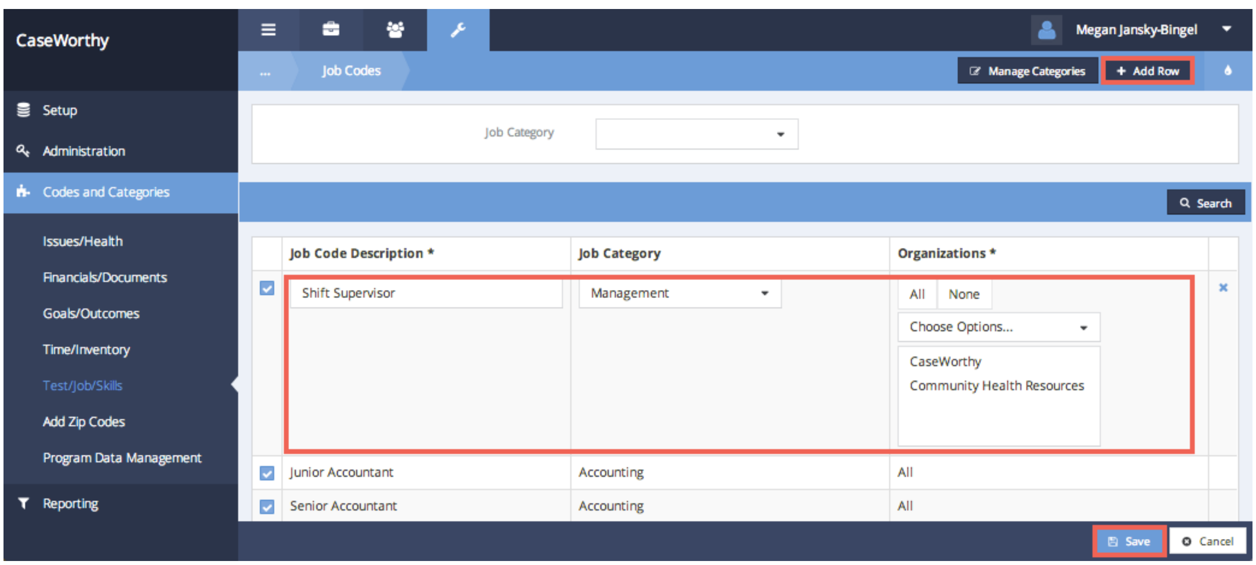
On the Job Codes form, access the job categories by clicking the Manage Categories button on the top right.



The Job Type Categories form displays. To add a job category, click the + Add Row button. Add a row for each job type category to be entered. Enter the category description. Click Save when all desired job type categories have been entered.



The Job Codes form displays. To add a job code, click the **+ Add Row** button. Add a row for each job code to be entered. Enter a Description and Category. Link all organizations that should have access to the job codes. When all desired job codes have been entered click the **Save** button.



Time/Inventory

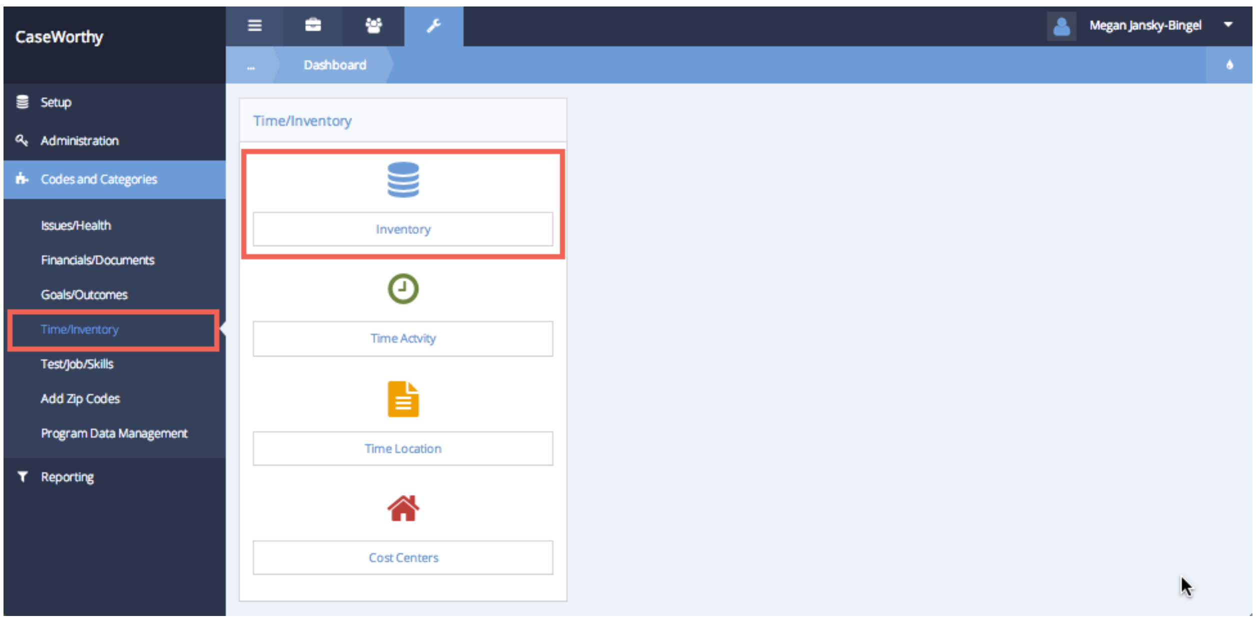
(Administration>Codes and Categories>Time/Inventory)

The Time/Inventory area of the Codes and Categories menu allows system administrators to customize the Inventory, Time Activity, Time Location and Cost Centers lists in CaseWorthy™.

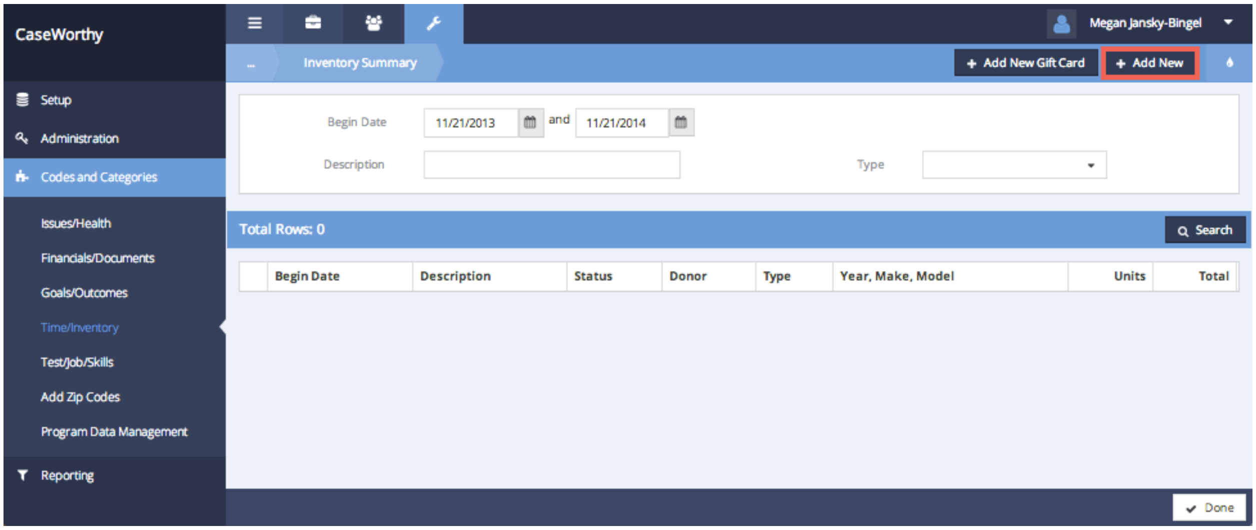
Inventory

(Administration>Codes and Categories>Time/Inventory>Inventory)

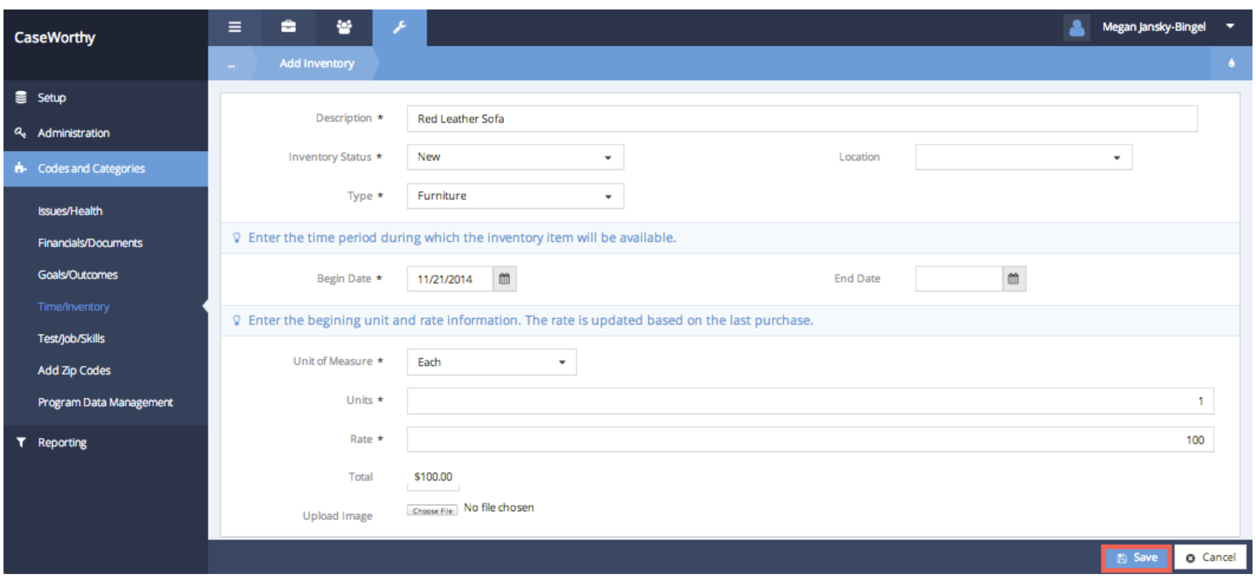
The Inventory area allows system administrators or other authorized users to add items to an inventory list and assign items within the inventory to users. To access the Inventory Area, click on the Inventory Icon on the Time / Inventory dashboard.



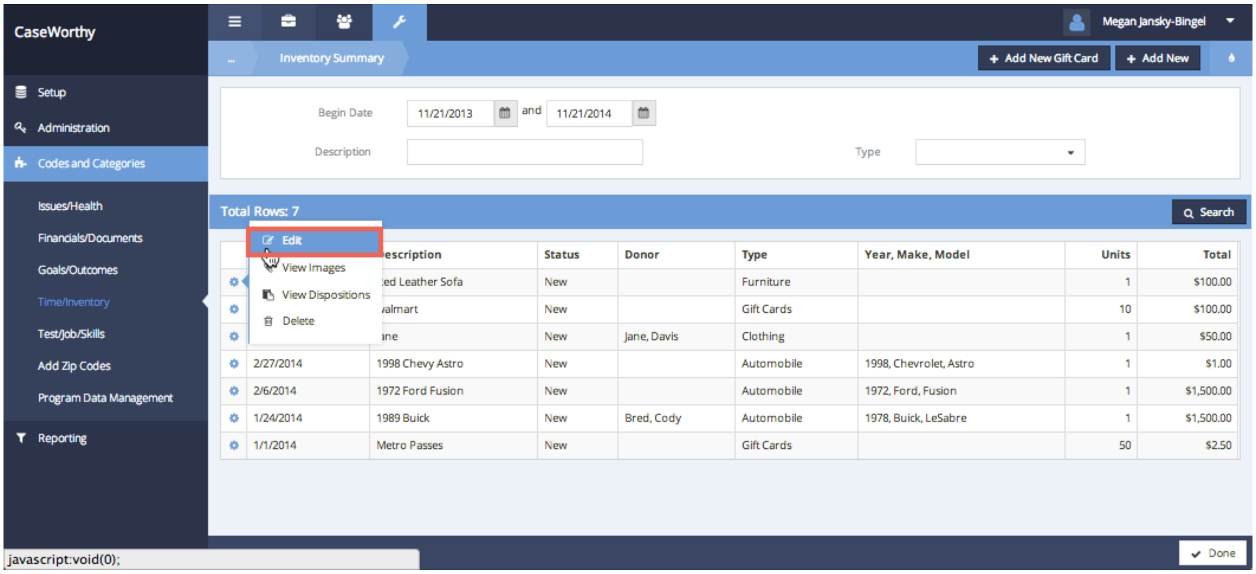
The Inventory (Summary) form displays. To add items to an inventory list, click the + Add Row button.



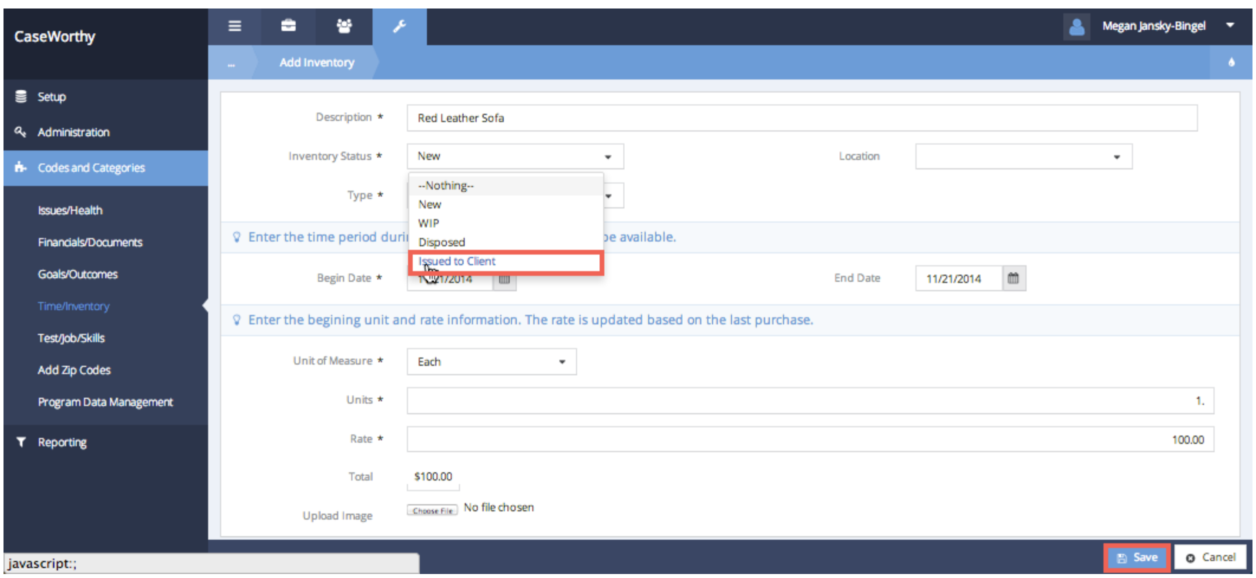
The Inventory (Add) form displays. Enter a description of the item – the Inventory status defaults to “New”. Use the drop-down list to indicate the inventory type (furniture, automobile, clothing, meal, etc.). If desired, enter the location where the item is being stored. The begin date defaults to the current date. Enter an End Date if appropriate. Unit of Measure defaults to “Each” and Units to “1”. Enter the estimated or established value of the inventory item. The Total auto-calculates. When all required/relevant information has been entered, click the Save button.



From the summary form, use the “Edit” button on the action gear menu to change inventory status (new, disposed, issued to client, etc.) and/or edit other details for the inventory item.

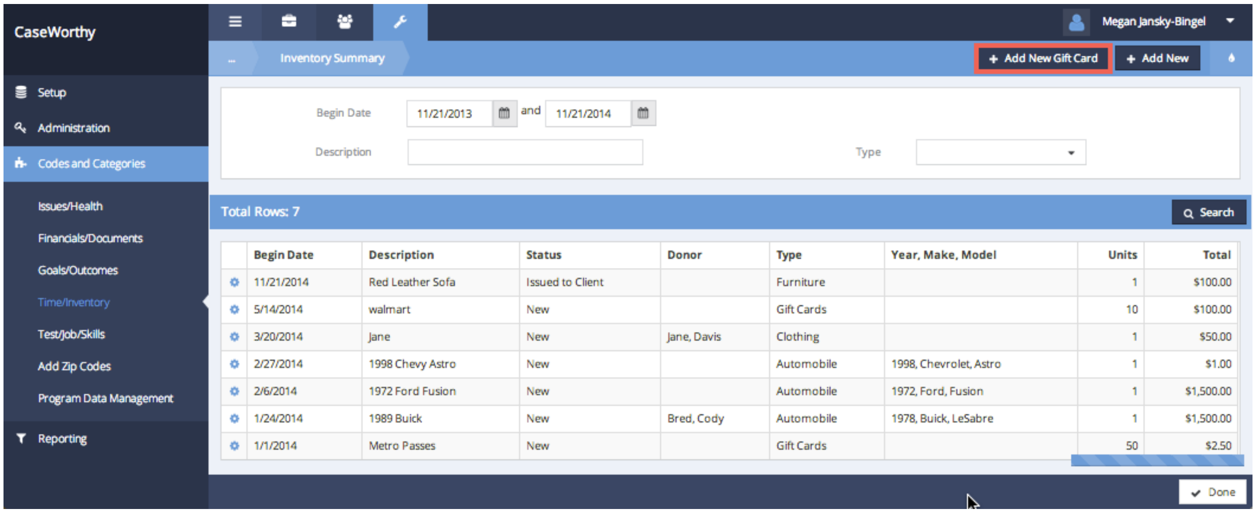


When desired edits have been completed, click the Save button.

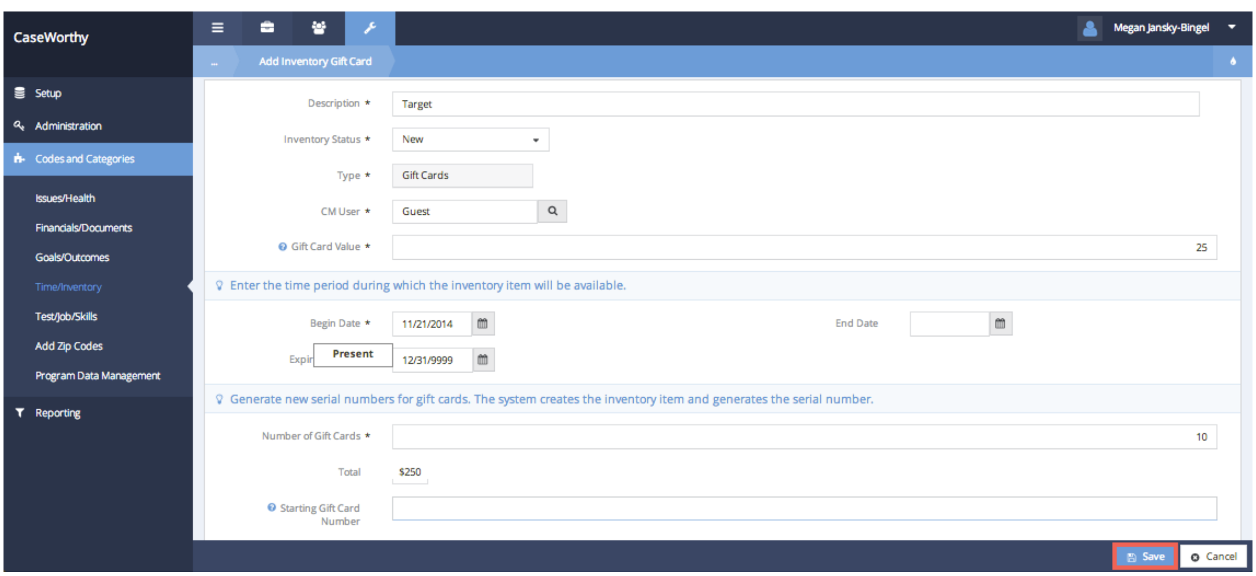


Gift Card Inventory

To enter Gift Card Inventory, from the Inventory Summary form, click the **+ Add New Gift Card** button.



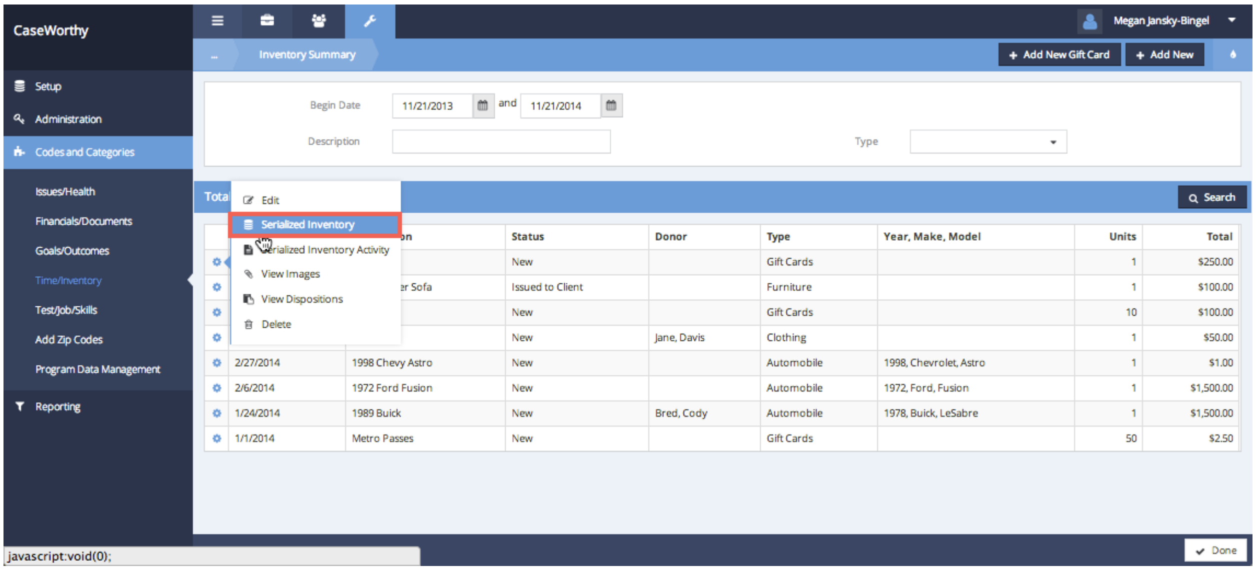
The Inventory Gift Card (Add) form displays. Enter a description of the type of gift card and the user who has possession of the cards. Enter the value of the individual gift cards. The Begin Date defaults to the current date. Enter an End Date if appropriate. The expiration date defaults to "Present" but can be edited as necessary. Enter the total number of gift cards in the batch to be assigned to inventory. The system automatically calculates the total value based on the number of gift cards and their assigned value. Enter the first Gift Card Number in the series of cards. The system starts with this number and add to it sequentially based on the number of cards identified in the "Number of Gift Cards" field. When all relevant/required data has been entered, click the **Save** button.



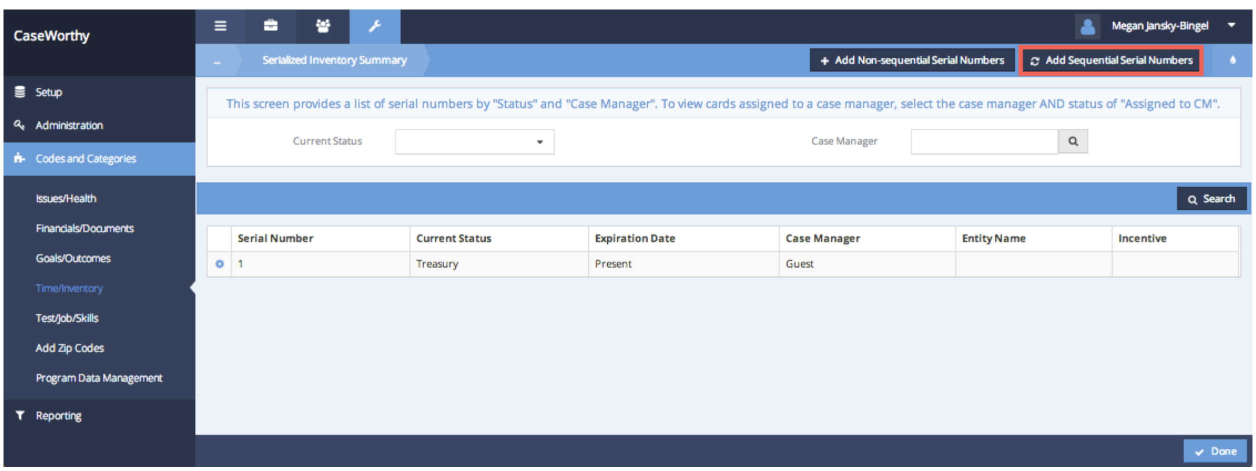
Once a type (Target, Walmart, etc.) of gift card with a specific designated value has been entered into inventory, there is no need to create it again when additional cards of that type and value are added.

Adding Sequential Serial Numbers

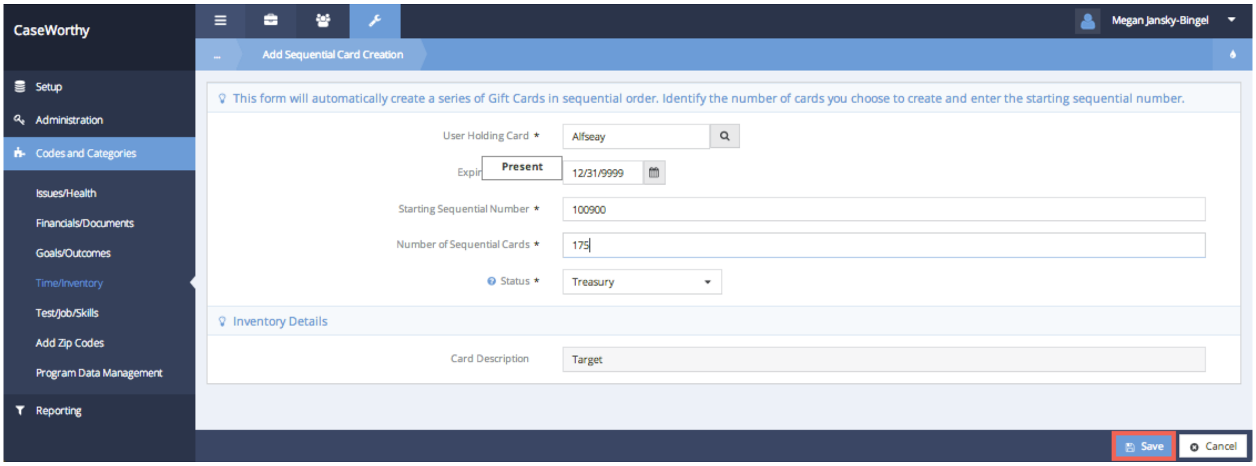
Simply click the action gear next to the desired type/value and select "Serialized Inventory" to add more cards.



The Serialized Inventory (Summary) form displays. Select the **Add Sequential Serial Numbers** button.

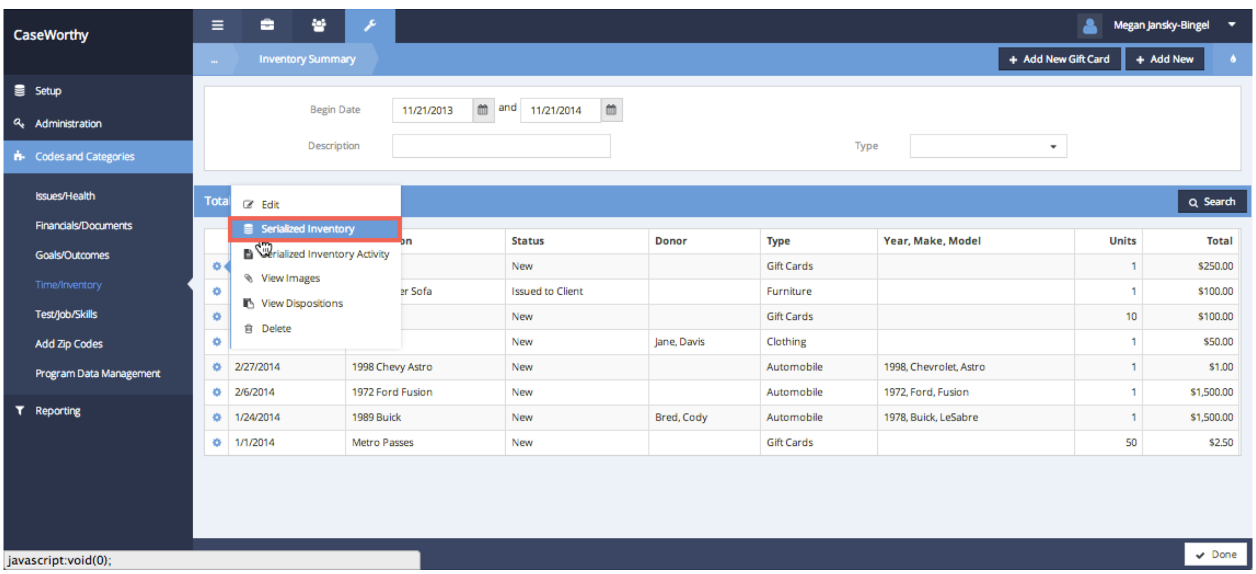


The Sequential Card Creation (Add New) form displays. Use the User Holding Card look-up icon to identify the user who has possession of the cards. The expiration date defaults to "Present" but can be edited as necessary. Enter the total number of gift cards in the batch to be assigned to inventory. The system automatically calculates the total value based on the number of gift cards and their assigned value. Enter the first Gift Card Number in the series of cards. The system starts with this number and add to it sequentially based on the number of cards identified in the "Number of Sequential Cards". Click **Save** when all relevant/required information has been entered.

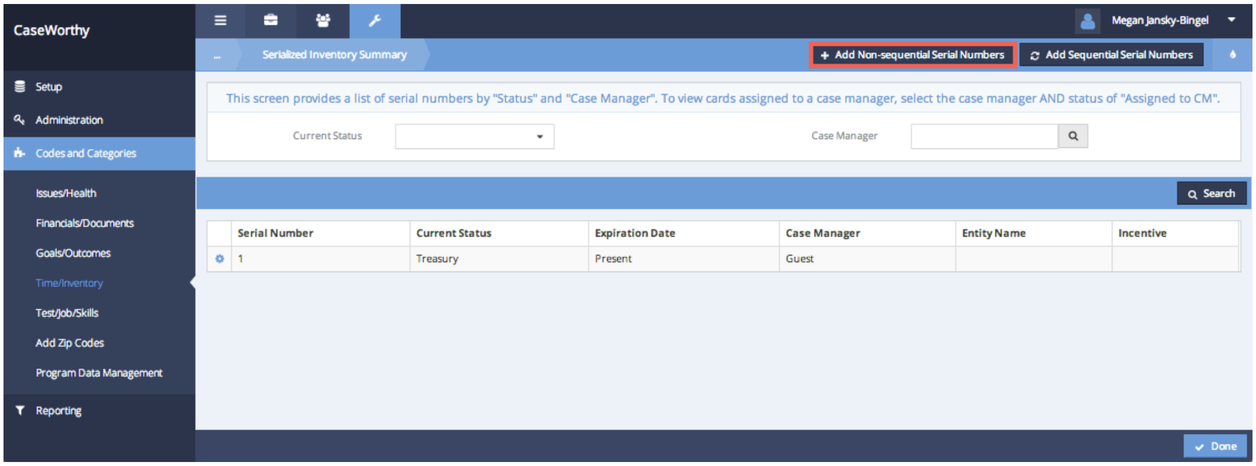


Adding Non-Sequential Serial Numbers

Simply click the action gear next to the desired type/value and select “Serialized Inventory” to add more cards.

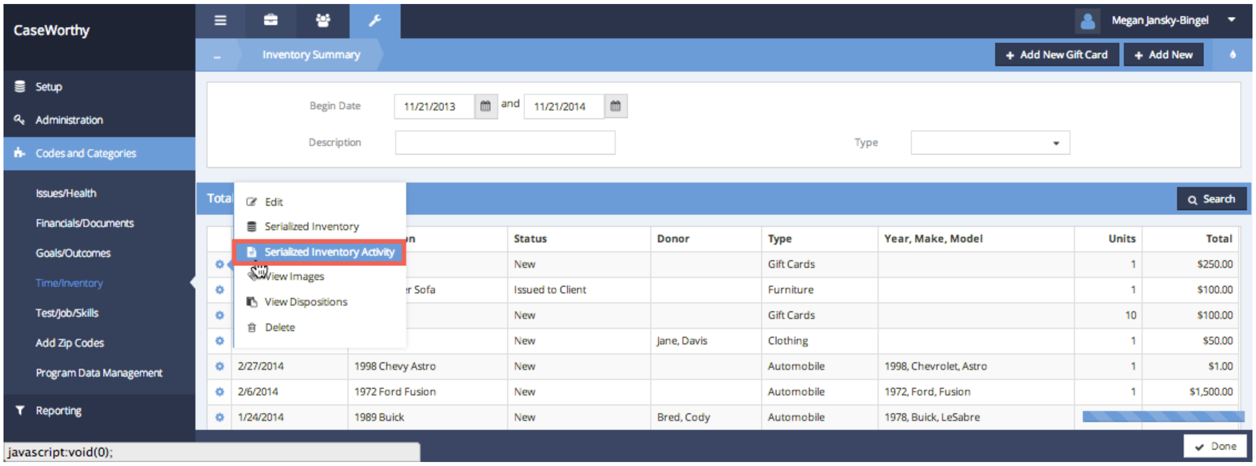


The Serialized Inventory form displays. Select the **+ Add Non-sequential Serial Numbers** button.

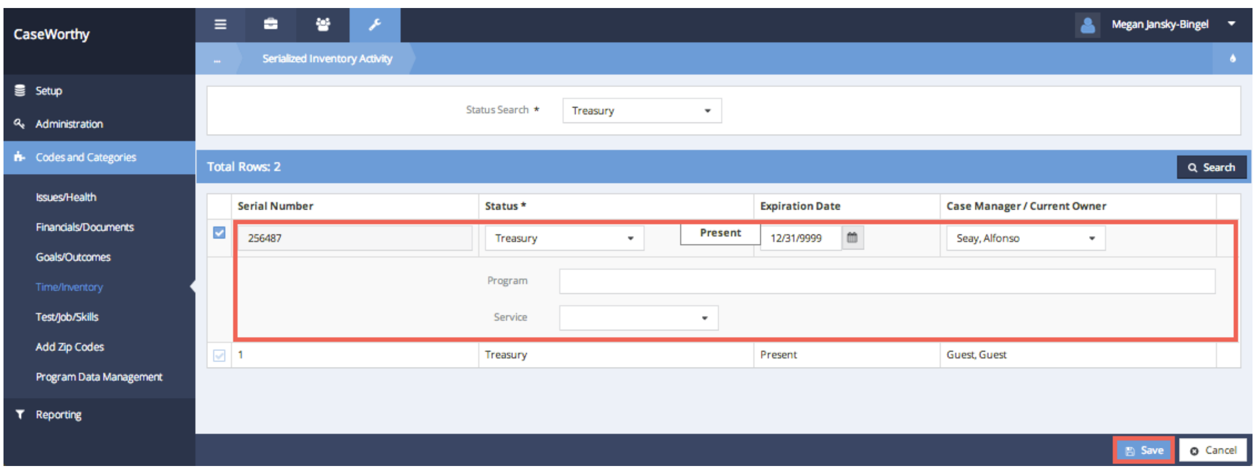


The Serialized Inventory (Spreadsheet Input) form displays. To add a non-sequential serial number, click the + Add Row button. Add a row for each serialized card to be entered. Enter the Serial Number. The status and Expiration Date defaults. Use the User Holding Card look-up icon to identify the user in possession of the card. When all desired non-sequential serial numbered items have been entered click the Save button.

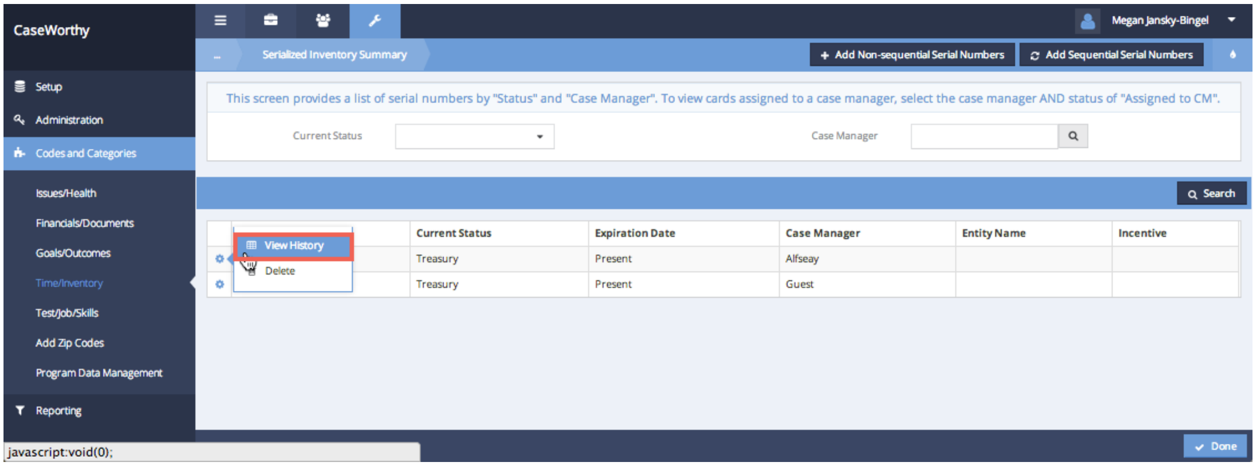
Inventory is assigned and managed from the My CaseWorthy™ menu in the Case Management area of CaseWorthy™ or from the Serialized Inventory Activity form accessed from the action gear on the Inventory summary form. Access the Serialized Inventory Activity form utilizing the second method.



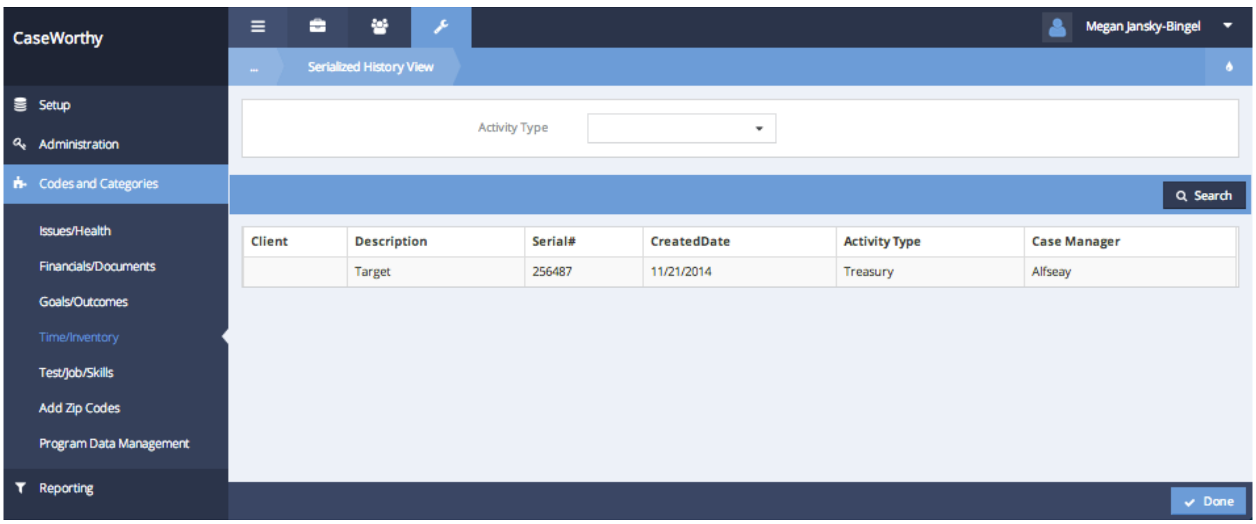
The Serialized Inventory Activity form displays. Select the clear checkbox next to the desired serialized item(s). Change the staff holding the card and or assign to a client using the appropriate look-up field. When assigning to a client, the Program and service fields auto-populates. When all required/relevant information has been entered click the Save button.



To view a history of inventory activity, from the Serialized Inventory summary form, click on the action gear next to the desired serial number and select “View History”.



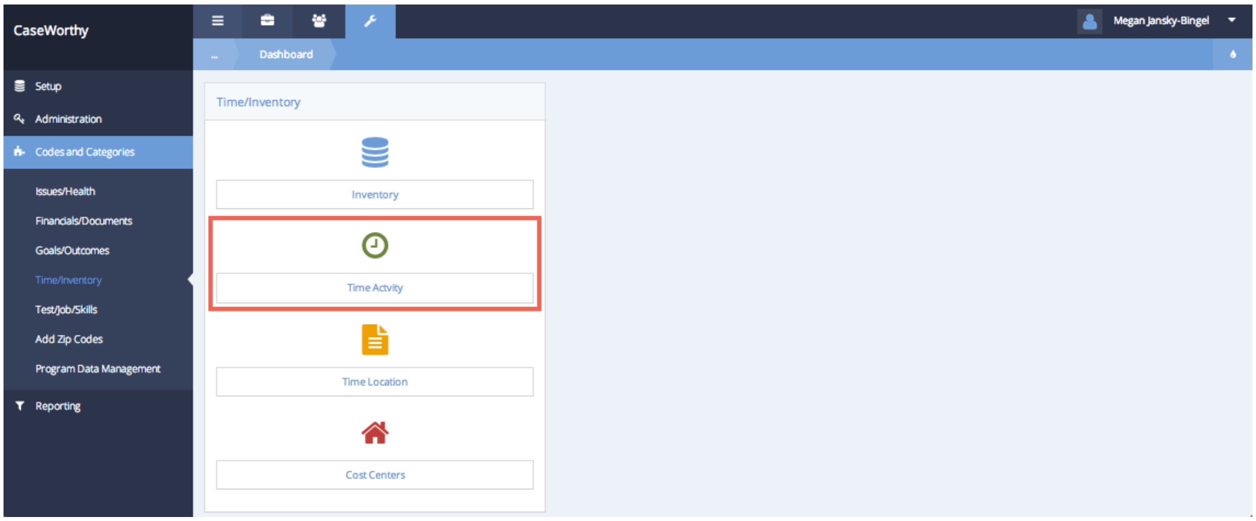
The Serialized History View form displays.



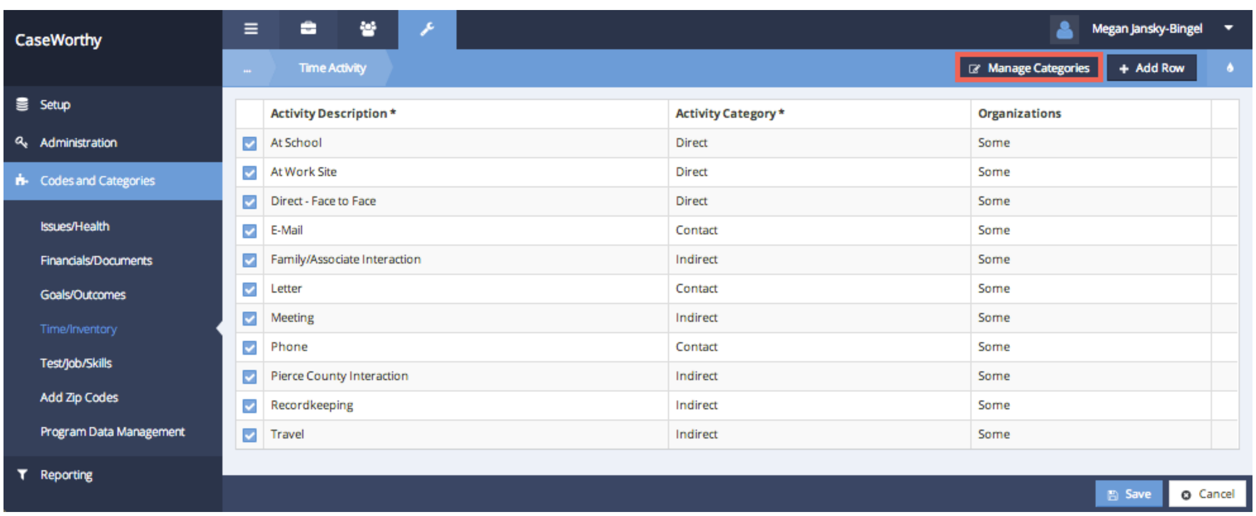
Time Activity

(Administration>Codes and Categories>Time/Inventory>Time Activity)

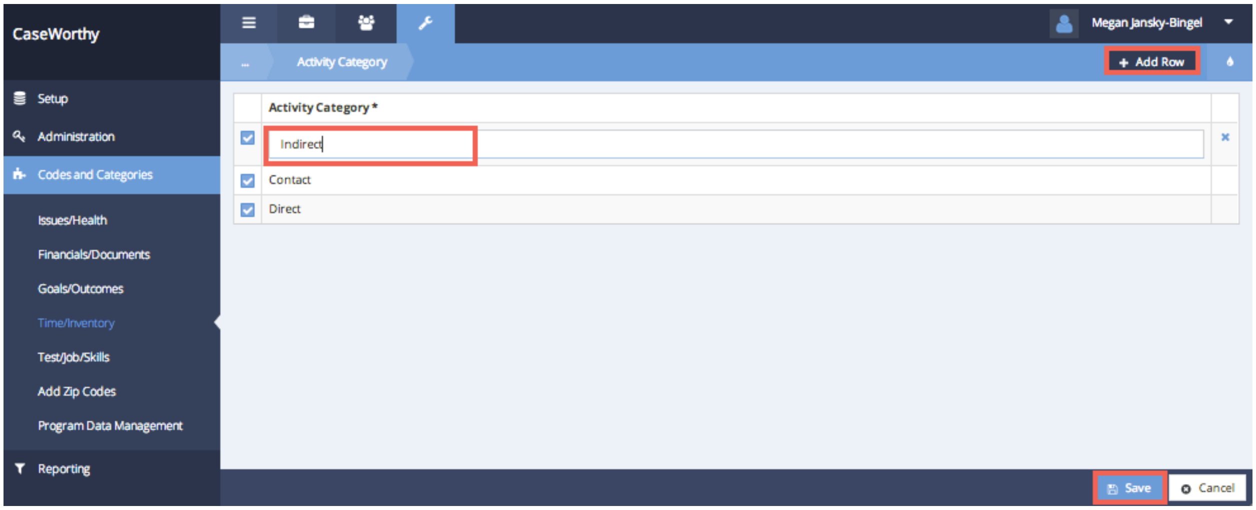
The Time Activity area allows system administrators to customize the Time Activity list that is accessible to users. To access the Time Activity set up area, select the Time Activity icon on the Time / Inventory dashboard.



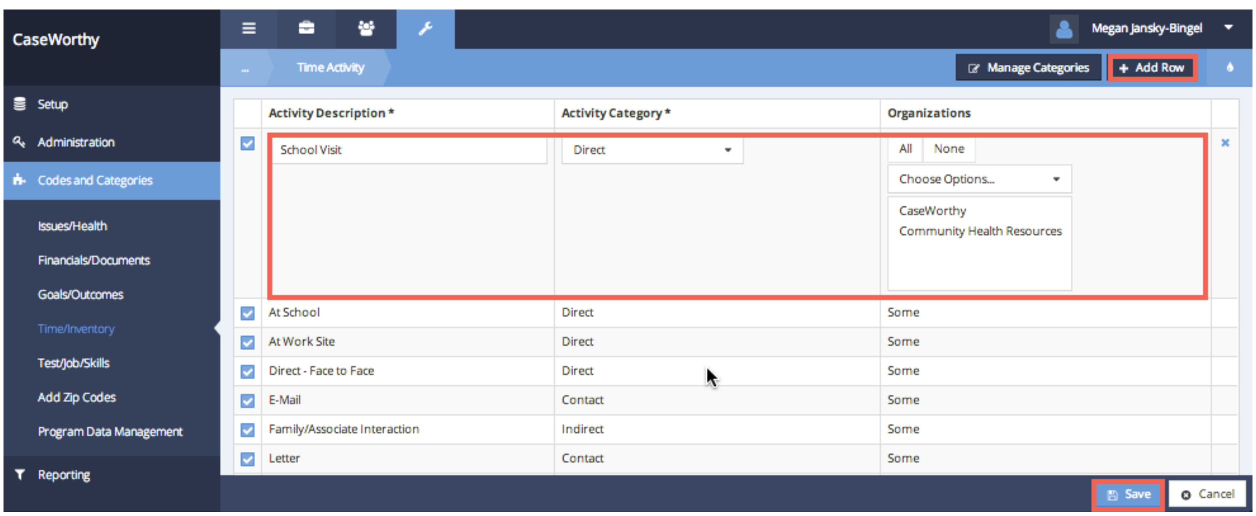
On the Time Activity (Spreadsheet) form, access the categories by clicking the Manage Categories button on the top right.



The Activity Category form displays. To add a category, click the + Add Row button. Add a row for each activity category to be entered. Enter the category description. Click Save when all desired activity categories have been entered.



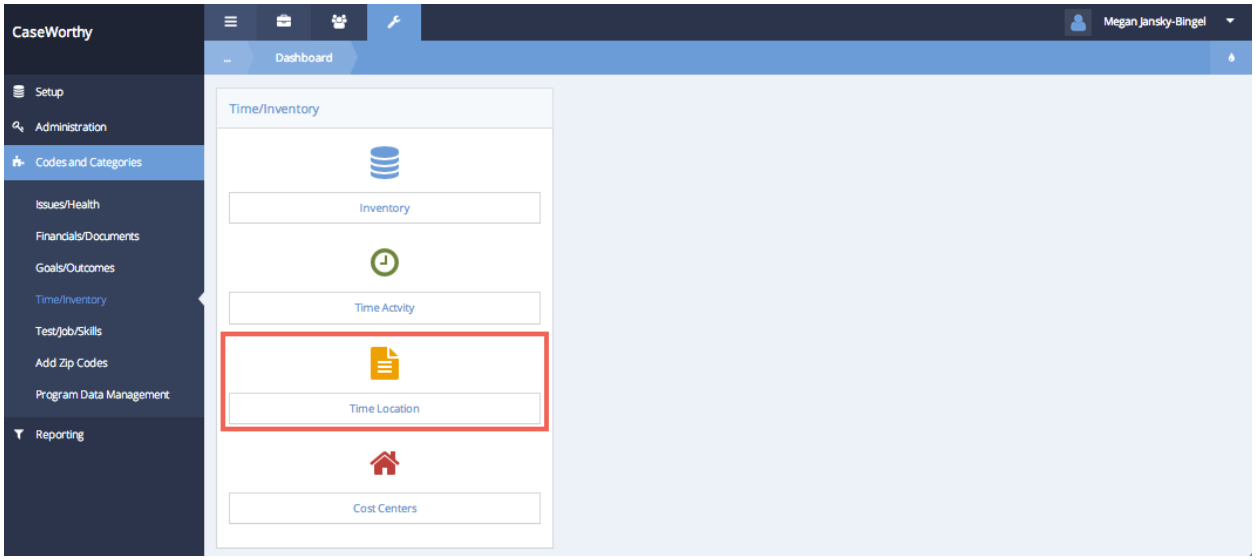
The Time Activity spreadsheet displays. To add an activity, click the + Add Row button. Add a row for each activity to be entered. Enter the Activity Description and select a Category. Identify the organizations that should have access to this activity type. When all desired time activities have been entered click the Save button.



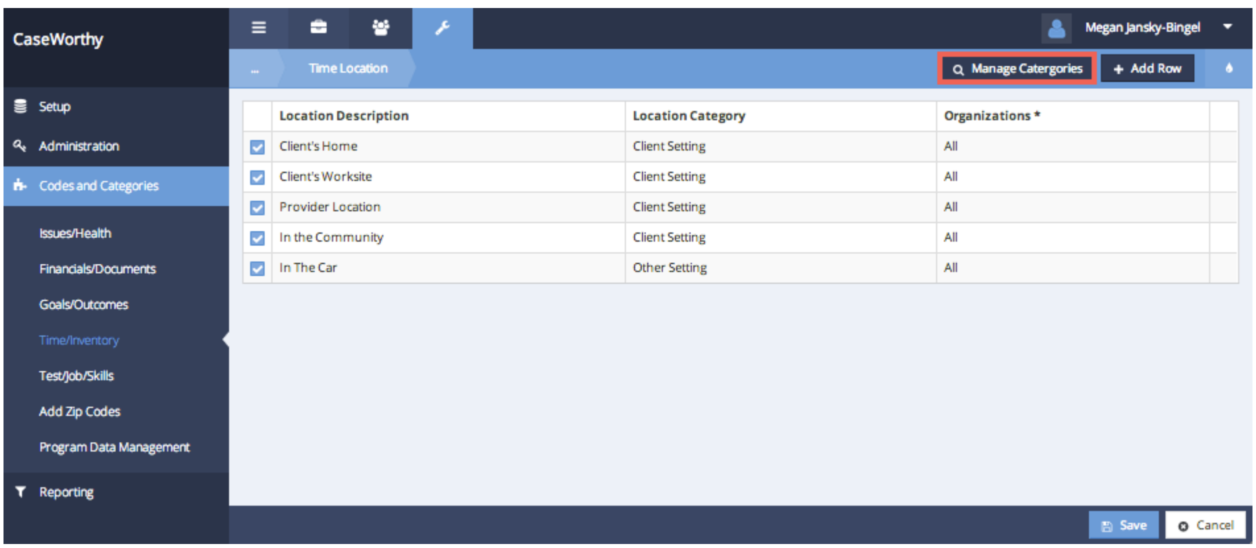
Time Location

(Administration>Codes and Categories>Time/Inventory>Time Location)

The Time Location area allows system administrators to customize the Time Locations list that is accessible to users. To access the Time Location set up area, select the Time Location icon on the Time / Inventory dashboard.

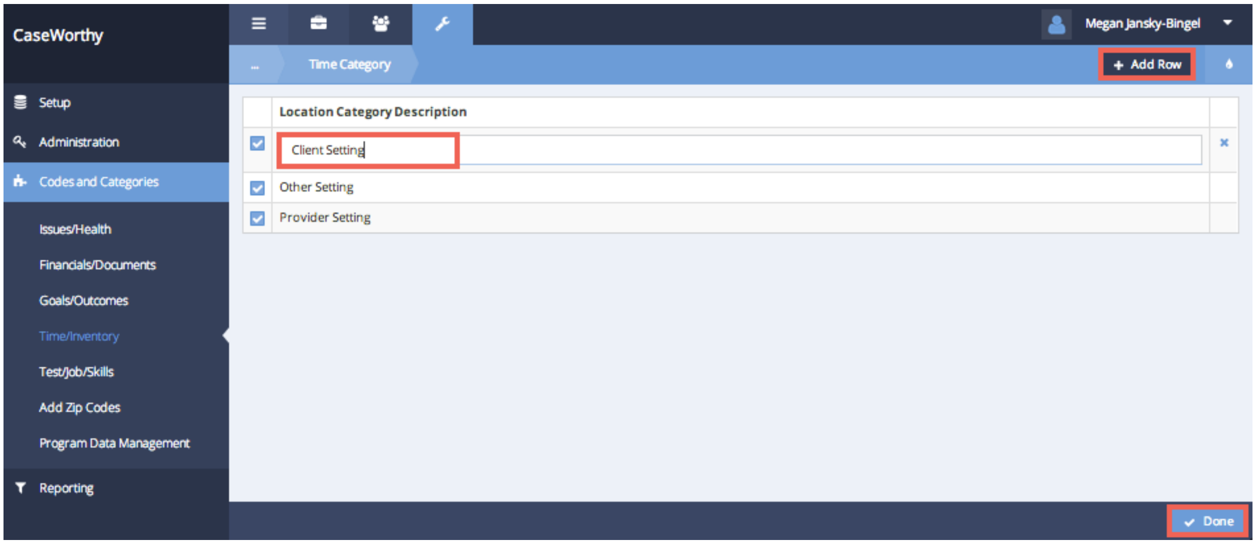


On the Time Location form, access the categories by clicking the Manage Categories button on the top right.

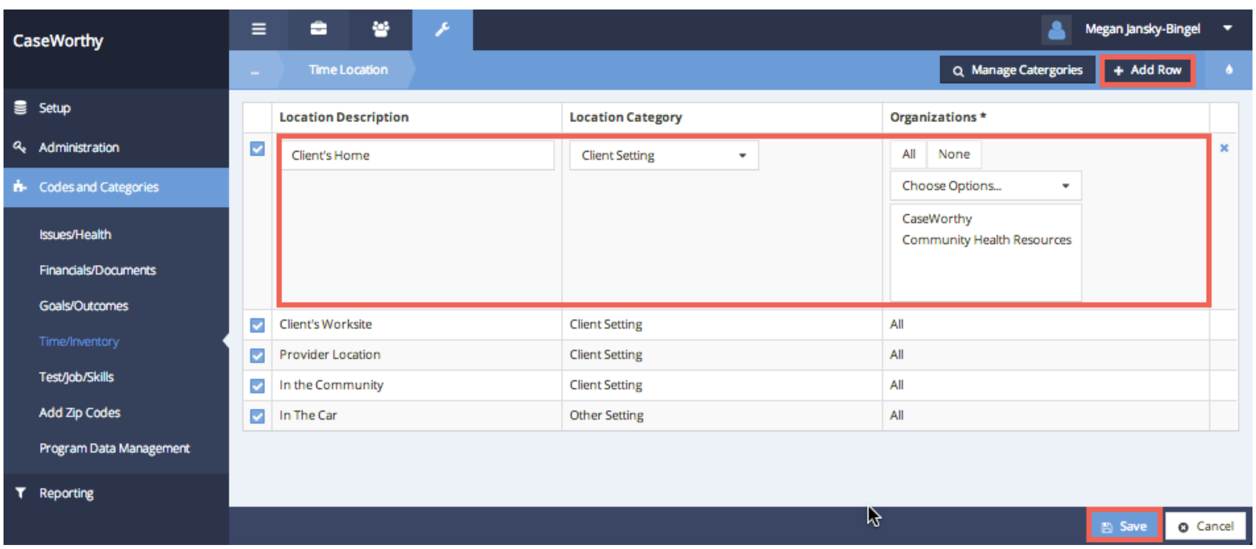


Location Description	Location Category	Organizations *
Client's Home	Client Setting	All
Client's Worksite	Client Setting	All
Provider Location	Client Setting	All
In the Community	Client Setting	All
In The Car	Other Setting	All

To add a category, click the + Add Row button. Add a row for each time location category to be entered. Enter the category description. Click ✔ Done when all desired time location categories have been entered.



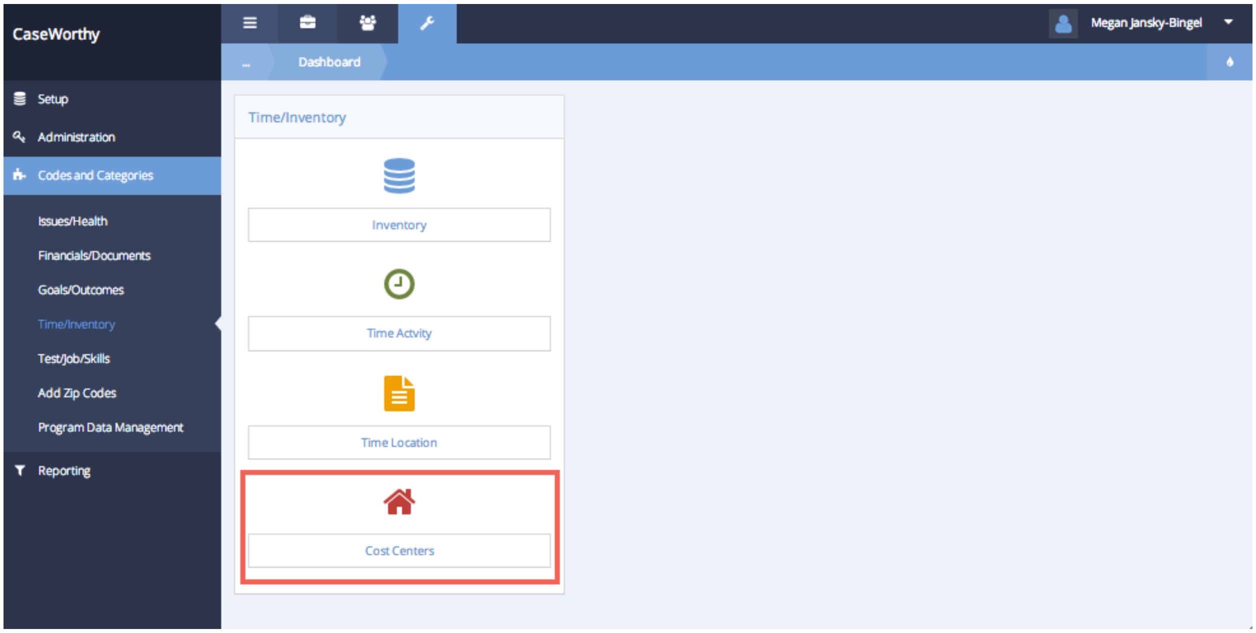
The Time Location form displays. To add location, click the Add Row button. Add a row for each location type to be entered. Enter the Location Description and select a Category. Identify all organizations that should have access to the time location. When all desired locations have been entered click the Save button.



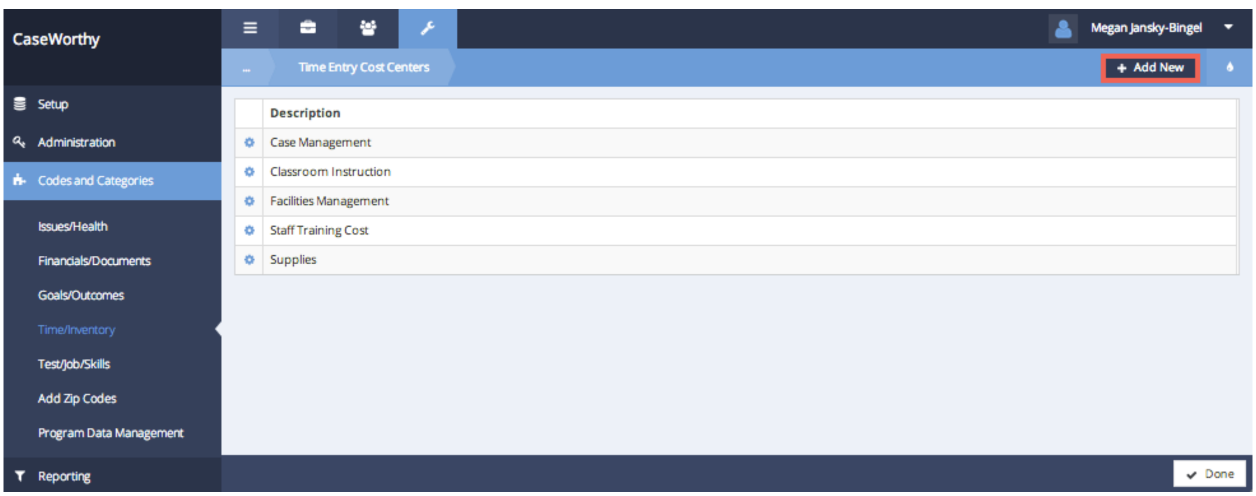
Cost Centers

(Administration>Codes and Categories>Time/Inventory>Cost Centers)

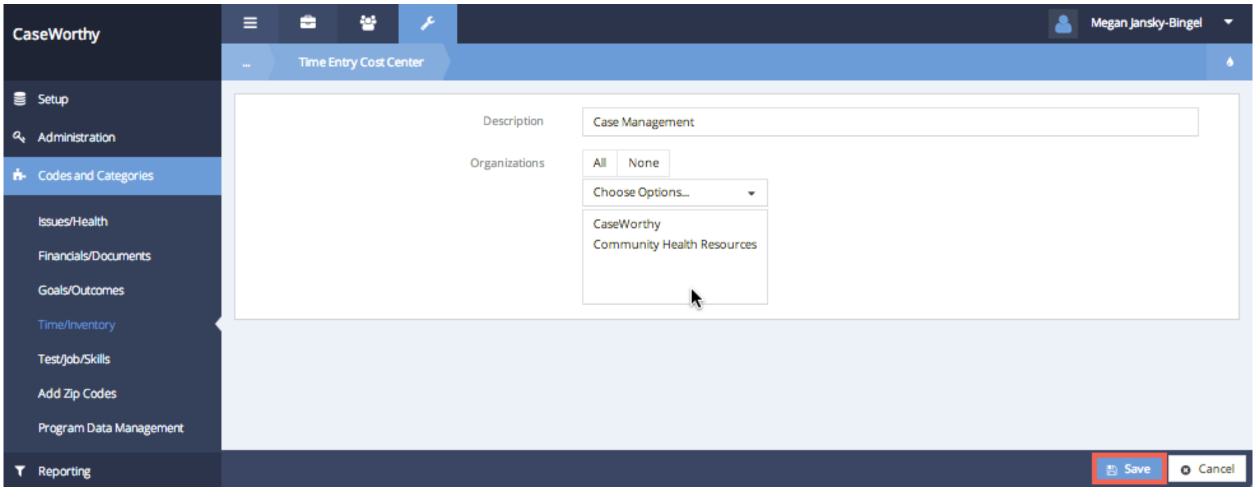
The Cost Centers area allows system administrators to customize the Cost Centers list that is accessible to users. To access the Cost Centers set up area, select the Cost Centers icon on the Time and Inventory dashboard.



The Time Entry Cost Centers form displays. To add a cost center, click the **+ Add New** button.



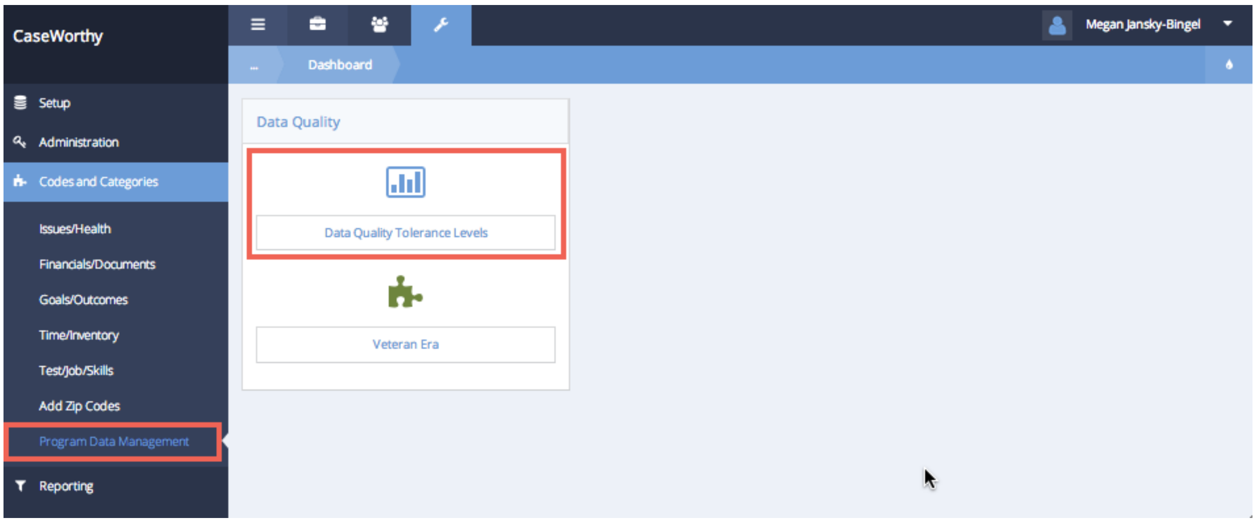
The Time Entry Cost Center form displays. Enter the Cost Center Description and identify all the organizations that should have access to the cost center. When all desired information has been entered click the **Save** button.


CaseWorthy
Megan Jansky-Bingel
Time Entry Cost Center
Setup
Administration
Codes and Categories
Issues/Health
Financials/Documents
Goals/Outcomes
Time/Inventory
Test/Job/Skills
Add Zip Codes
Program Data Management
Reporting
Description
Case Management
Organizations
All
None
Choose Options...
CaseWorthy
Community Health Resources
Save
Cancel

Program Data Management

(Administration>Codes and Categories>Program Data Management)

The Program Data Management area of the Codes and Categories menu allows system administrators to customize the Data Quality Tolerance Levels in CaseWorthy™.

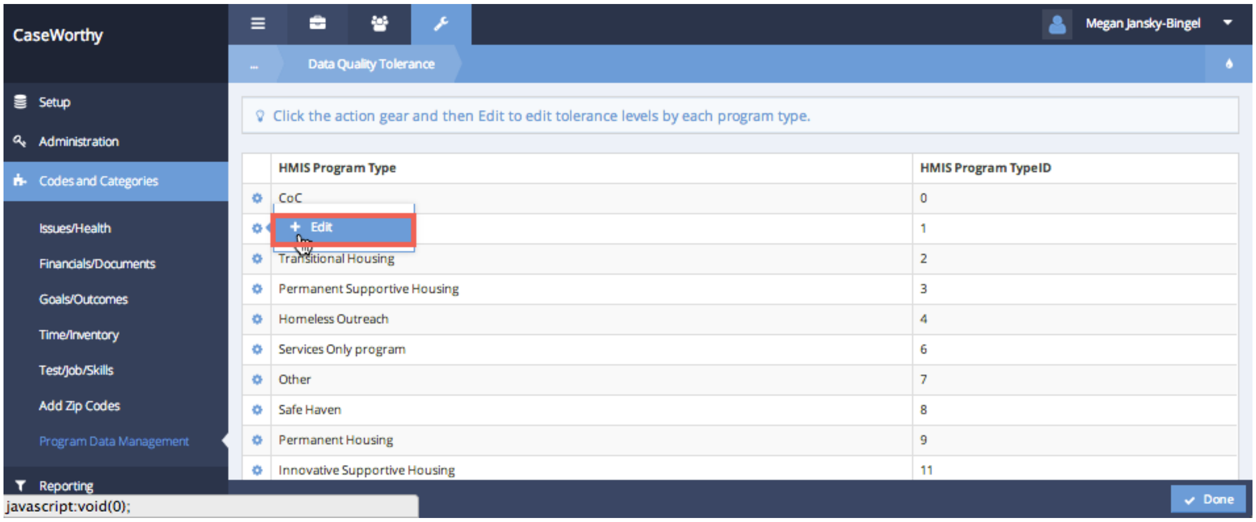


Data Quality Tolerance Levels

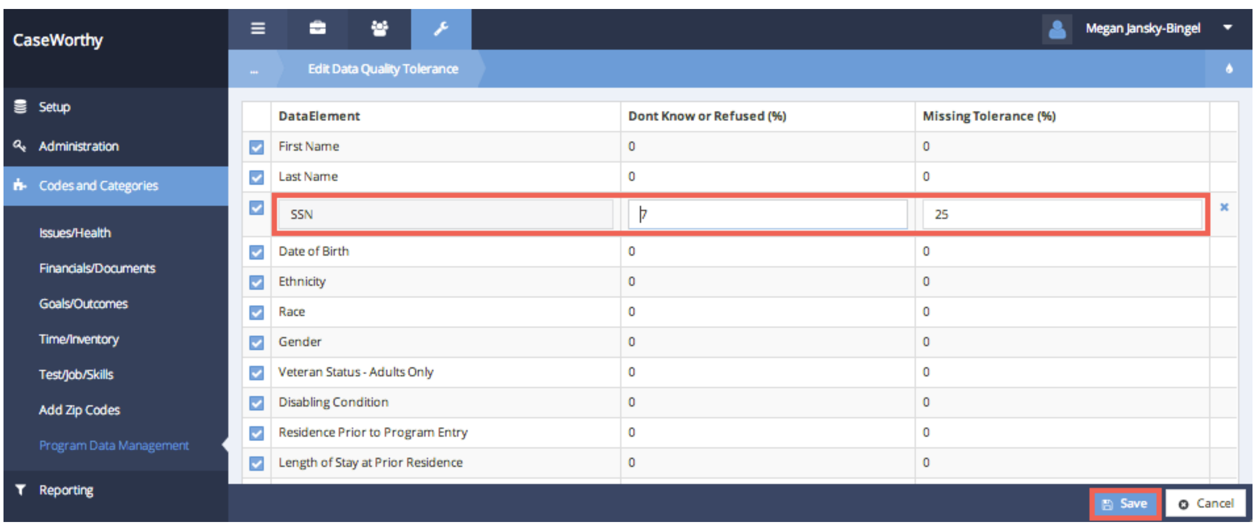
(Administration>Codes and Categories>Program Data Management>Data Quality Tolerance Levels)

The Data Quality Tolerance Levels area allows system administrators to customize various data points by program. This setup maps to the Data Quality report in the CaseWorthy™ reporting area. To access the Data Quality Tolerance Level set up area, select the Data Quality Tolerance Level icon on the Data Quality dashboard.

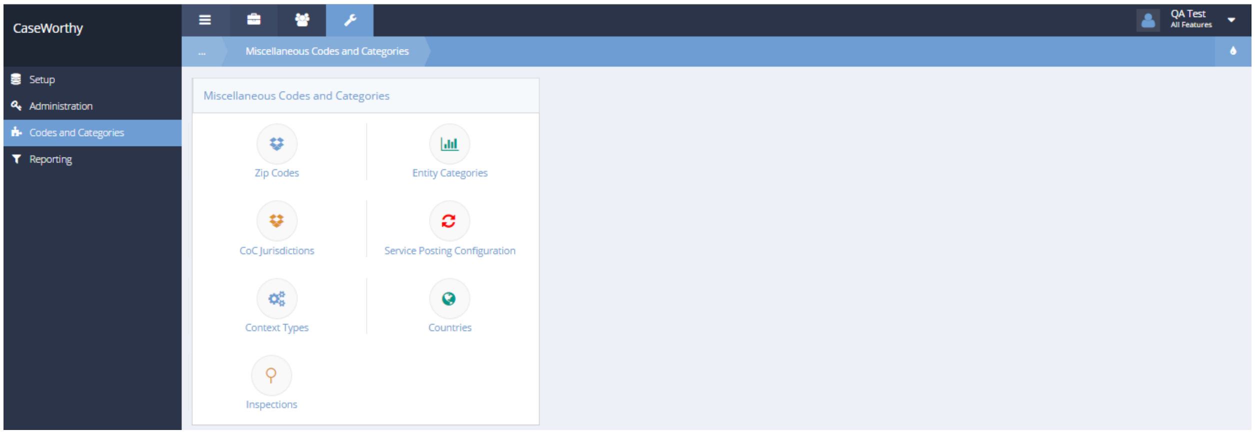
The Data Quality Tolerance form displays. To edit the tolerance levels of various data types, click the action gear next to the desired program and select "Edit".



The Data Quality Tolerance Edit form displays. Select the blue checkbox next to the desired data element. Enter the percent of missing data to be tolerated. When all desired data elements have had tolerance levels set, click the Save button.



Miscellaneous

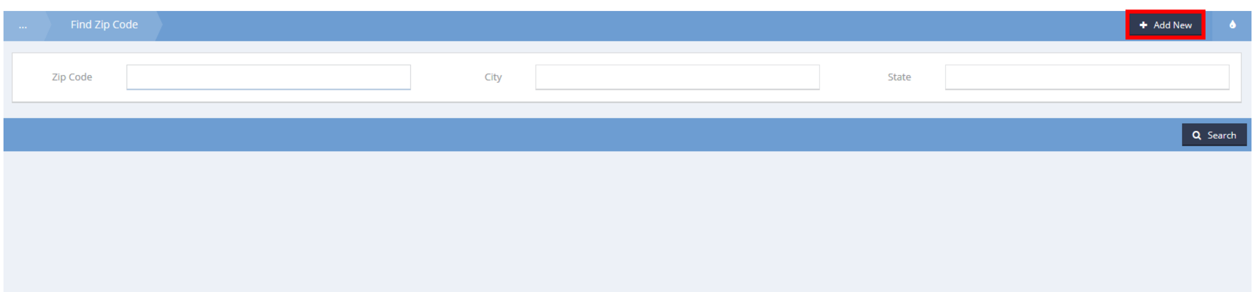


Zip Codes

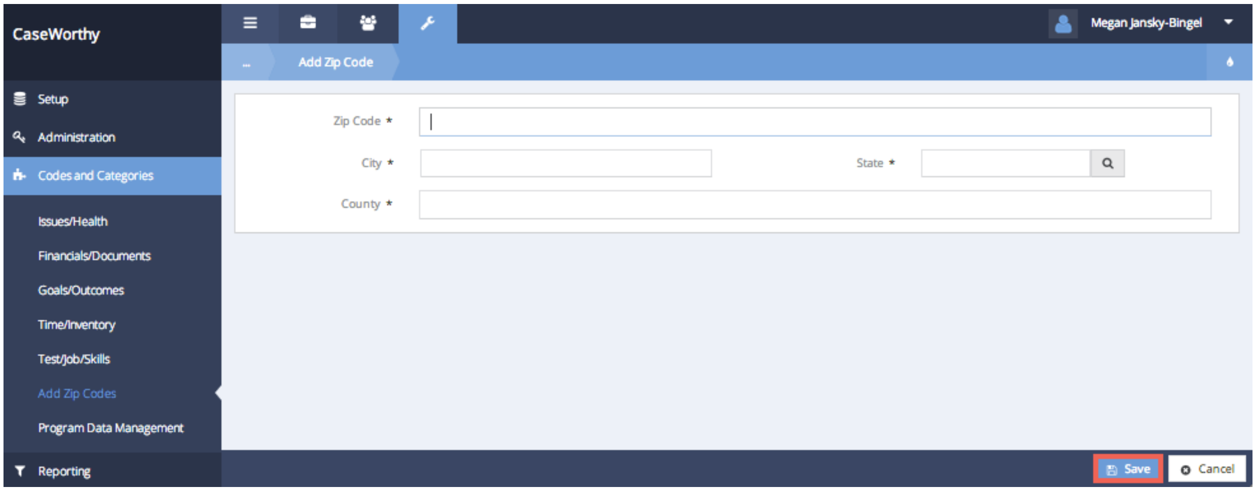
(Administration>Codes and Categories>Other)

The Add Zip Codes area of the Codes and Categories menu allows system administrators to add the zip codes to the list in CaseWorthy™. Click the Zip Codes icon on the Miscellaneous Codes and Categories dashboard. The Find Zip Code with Add New form displays.

To add a new zip code, click the **+ Add New** button on the top right.



The Zip Code (Add) form displays. Enter the Zip Code and the associated City, County and State. Click **Save** when done.

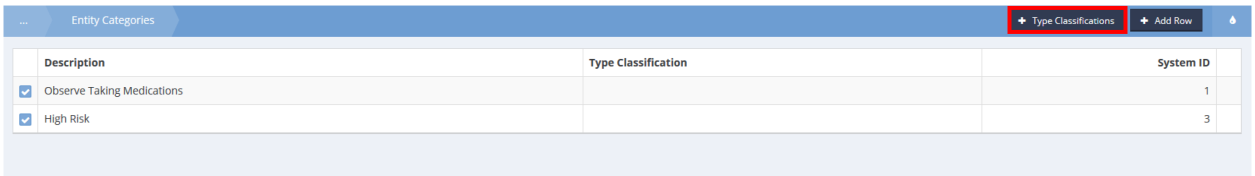

CaseWorthy
Megan Jansky-Bingel
Add Zip Code
Setup
Administration
Codes and Categories
Issues/Health
Financials/Documents
Goals/Outcomes
Time/Inventory
Test/Job/Skills
Add Zip Codes
Program Data Management
Reporting
Zip Code *
City *
State *
County *
Save
Cancel

Entity Categories

(Administration>Codes and Categories>Other)

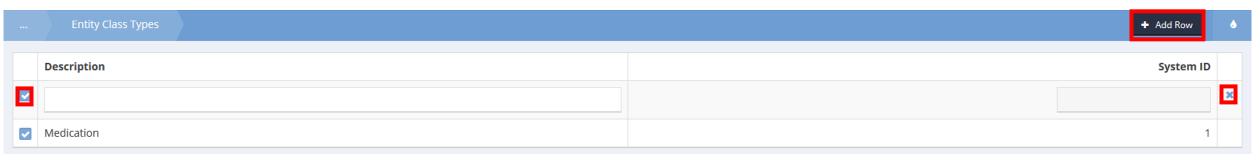
The Entity Categories area of the Codes and Categories menu allows system administrators to add entity categories to the list in CaseWorthy™. Click the Entity Categories icon on the Miscellaneous Codes and Categories dashboard. The Entity Categories form displays.

To add or edit a type, click the + Type Classifications button. The Entity Class Types form displays.



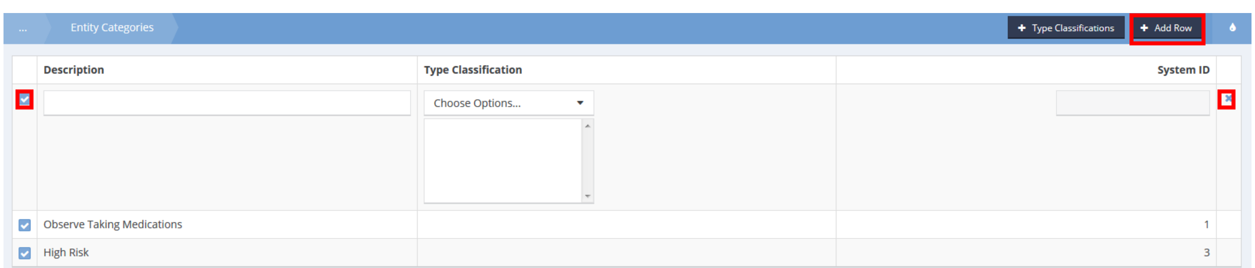
To edit an existing type, click the blue checkbox. The description field becomes editable. To delete a row, click the icon and confirm on the pop-up dialog.

Click + Add Row to add a new type. Enter a description and click Save. The Entity Categories form displays.



To edit an existing category, click the blue checkbox. To delete a category, click the icon and confirm on the pop-up dialog.

Click + Add Row to add a new category. Enter a description and select a type. Click Save when done.

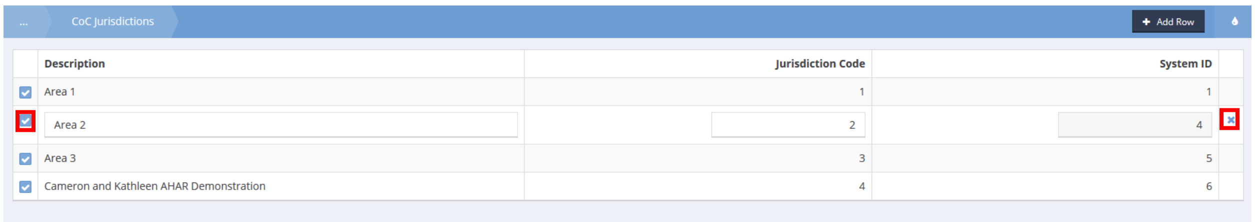


CoC Jurisdictions

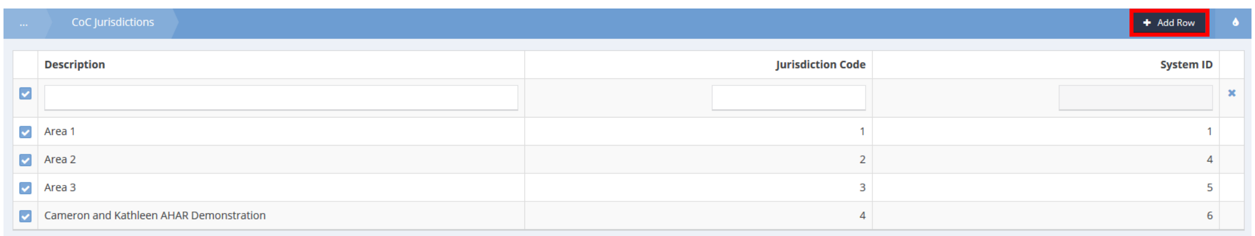
(Administration>Codes and Categories>Other)

The CoC Jurisdictions area of the Codes and Categories menu allows system administrators to add CoC Jurisdictions to the list in CaseWorthy™. Click the CoC Jurisdictions icon on the Miscellaneous Codes and Categories dashboard. The CoC Jurisdictions form displays.

Click the blue checkbox to edit an existing jurisdiction. The description and code fields become editable. Click the icon to delete a jurisdiction.



Click Add Row to create a new jurisdiction. Enter a description and jurisdiction code and click Save when done.

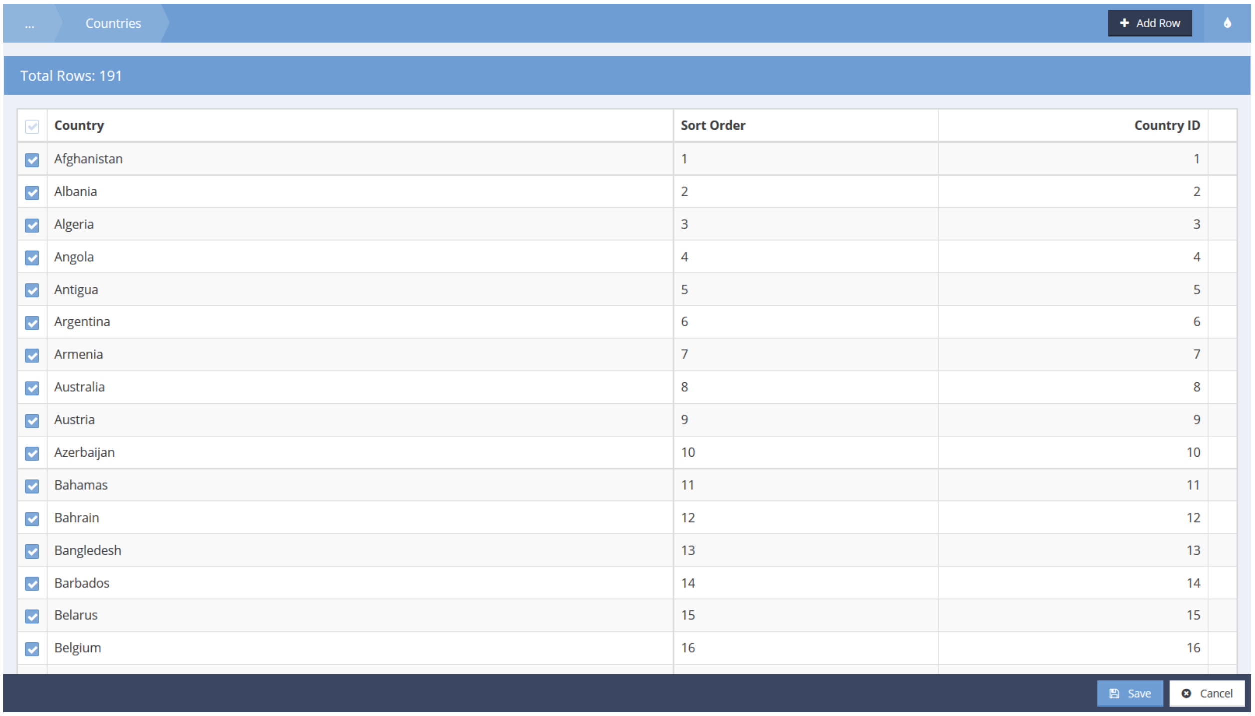


Countries

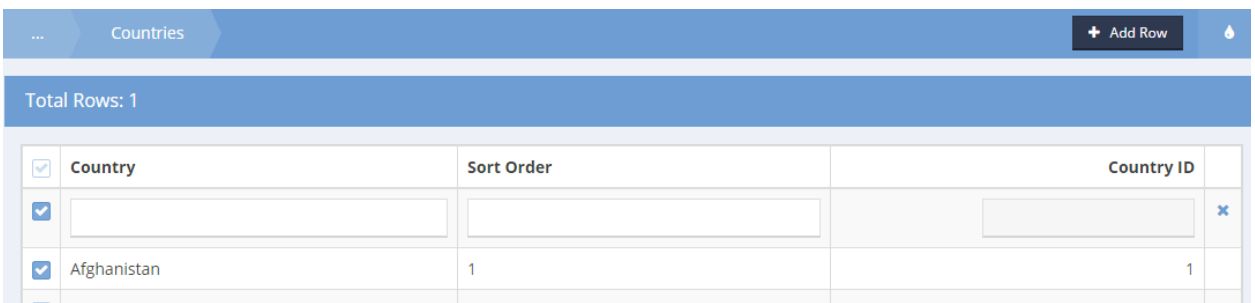
Objective: Create Country codes.

Navigation: Administration>Codes and Categories>Miscellaneous>Countries

The Countries form displays



Use the Add Row button to add a country to the list. The row expands to enter the name and sort order of the country.

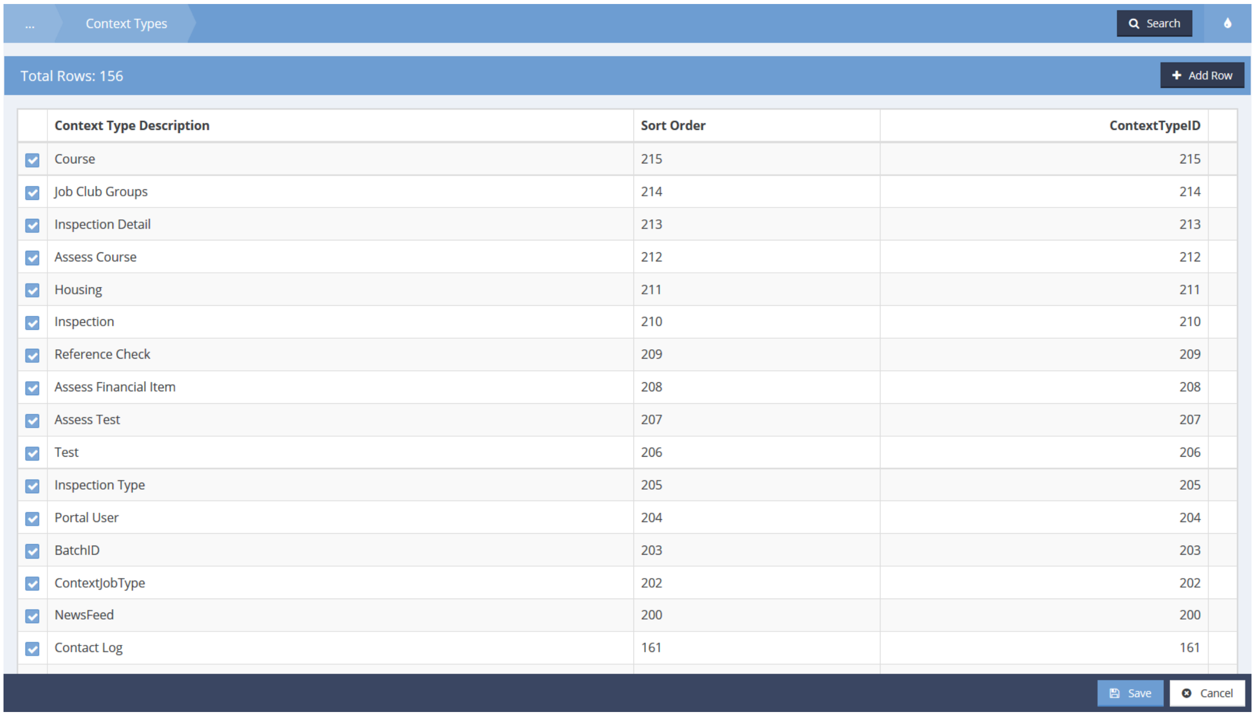


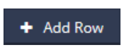
Context Types

Objective: Create Context Type codes.

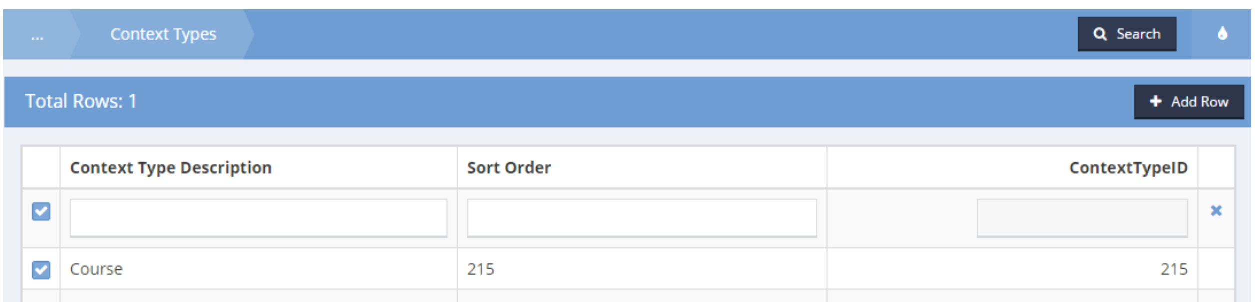
Navigation: Administration>Codes and Categories>Miscellaneous>Context Types

The Context Types form displays.



Use the 

button to add a new context type to the list. The row expands to enter the name and sort order of the context type.

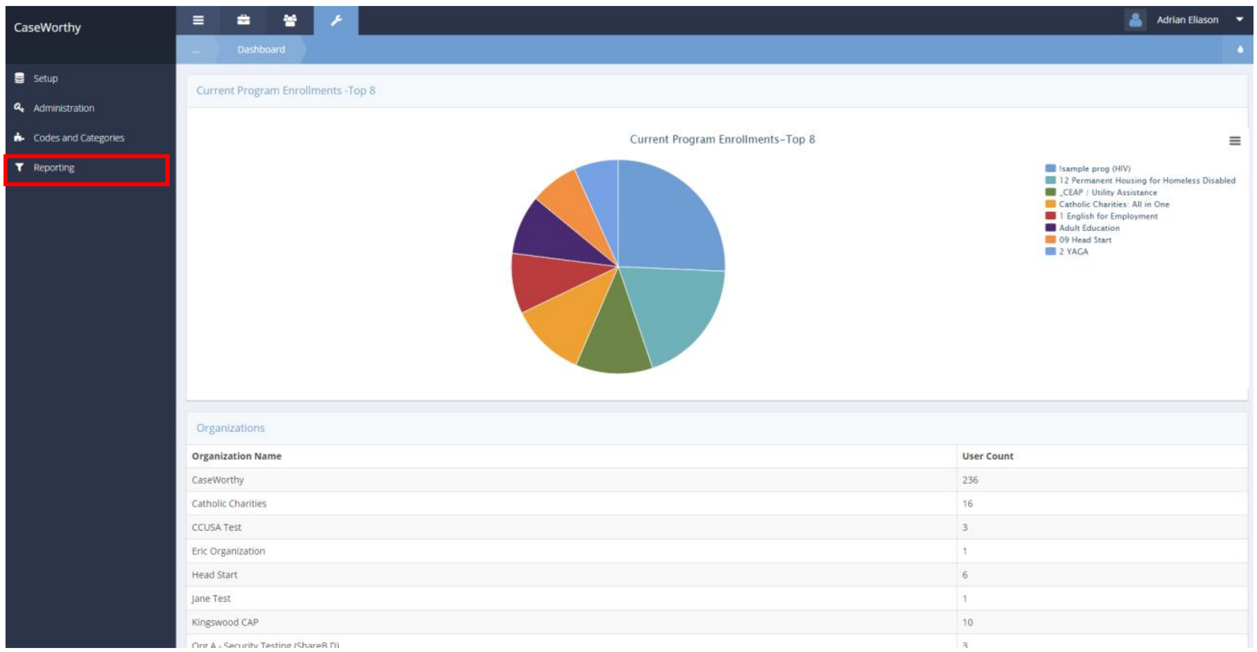


Reporting

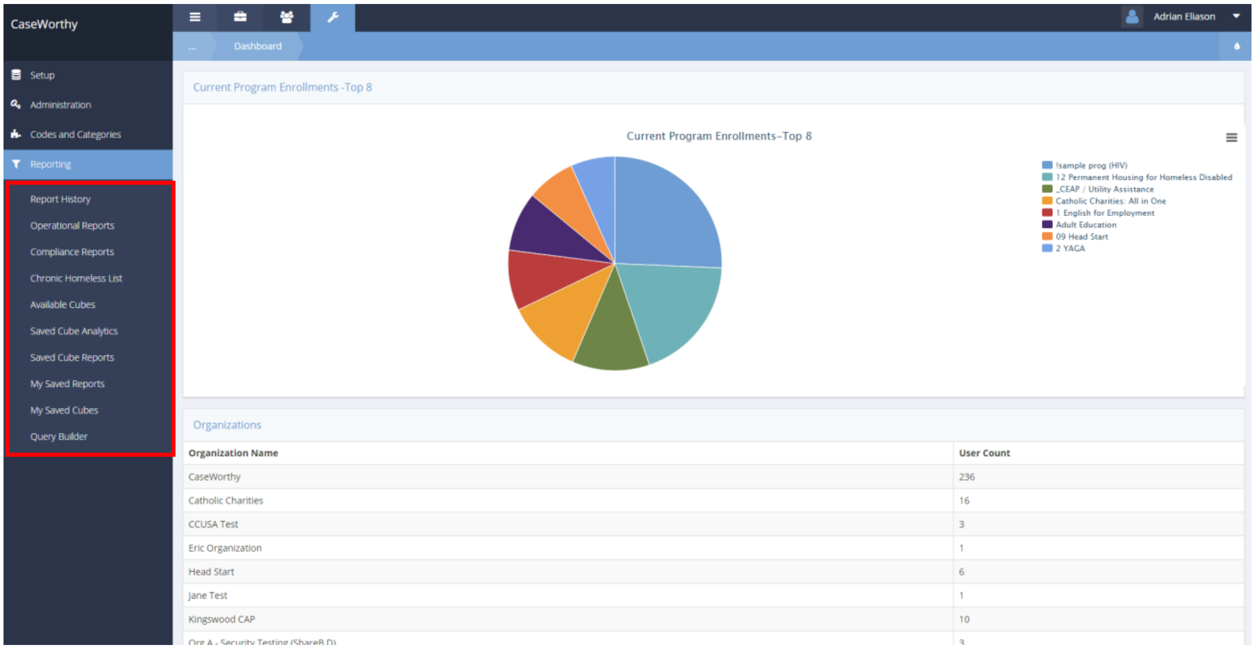
(Administration>Reporting)

Reporting Basics

To navigate to the reporting area, click the Reporting tab on the taskbar.



The Reporting tab has ten links: Report History, Operational Reports, Compliance Reports, Chronic Homeless List, Available Cubes, Saved Cube Analytics, Saved Cube Reports, My Saved Reports, My Saved Cubes, and Query Builder.



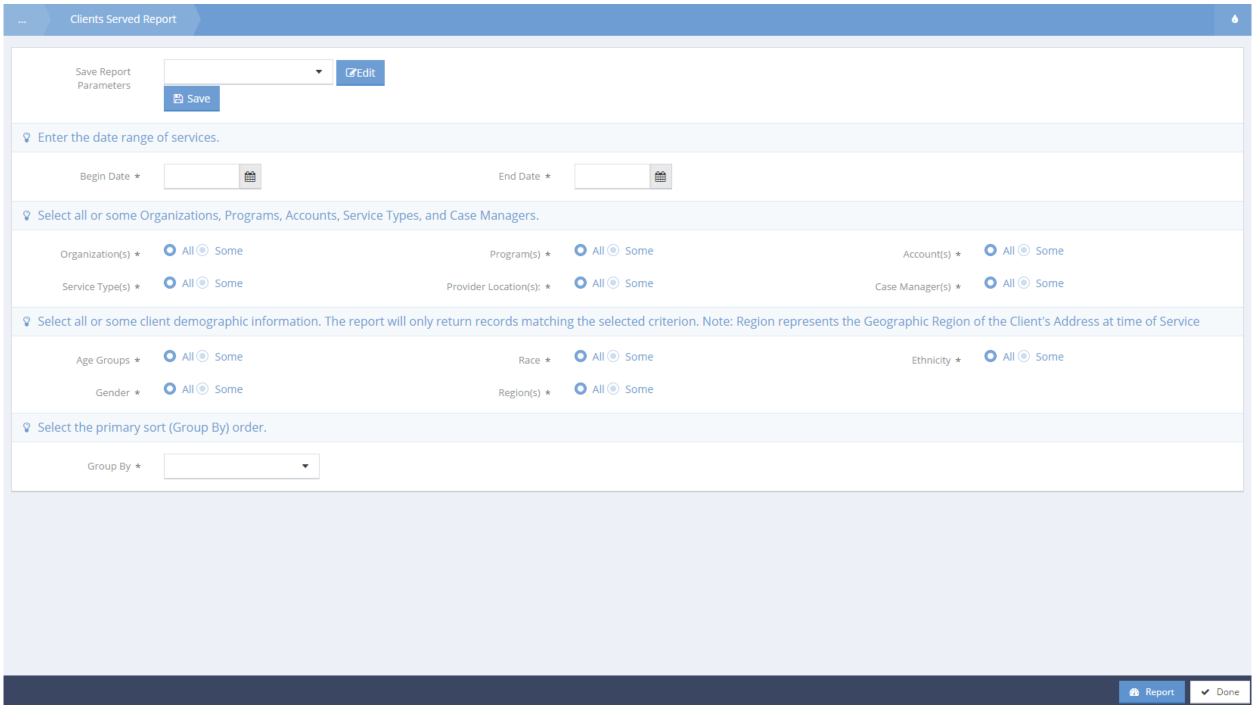
The Operational Report area contains reports relating to programs, services, and users. The Compliance Report area houses funder required reports. The Query Builder allows System Administrators to create data views that can be used to summarize data on a dashboard, define criteria for a drop-down list or data look-up field, or in some cases, take a quick snapshot of data for a one-time need.

Launching a Report

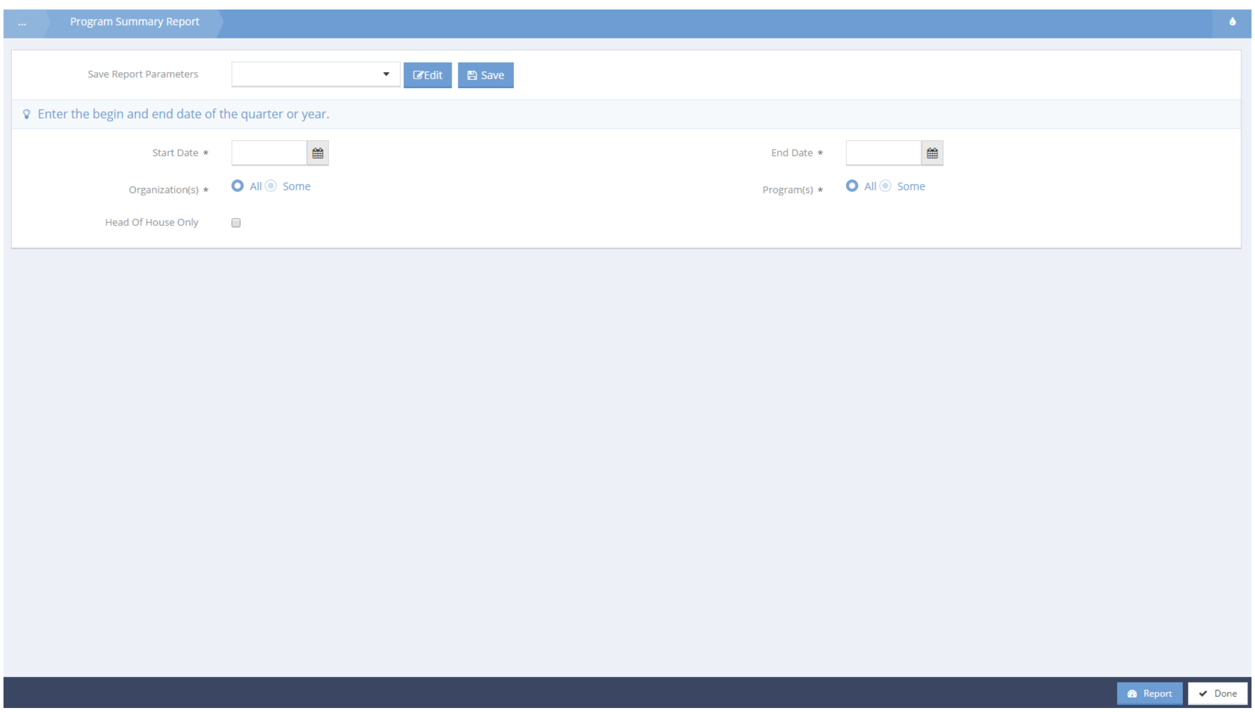
Each report has a “Launch Form” that allows the user to set the criteria and filter data. Each launch form is customized to the specific data associated with and purpose of the individual report to which it is linked. However, the basic functionality to launch a report is the same for all Operational and Compliance reports.

To run a report, click on its associated icon on the report dashboard. The launch form appears. Below are examples of a couple different reports:

Clients Served:

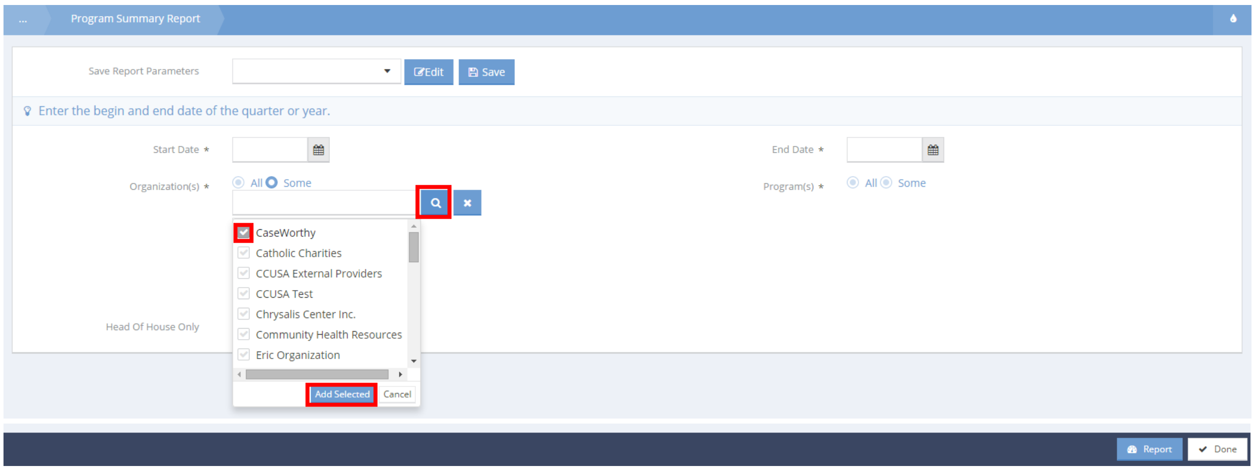


Program Summary:

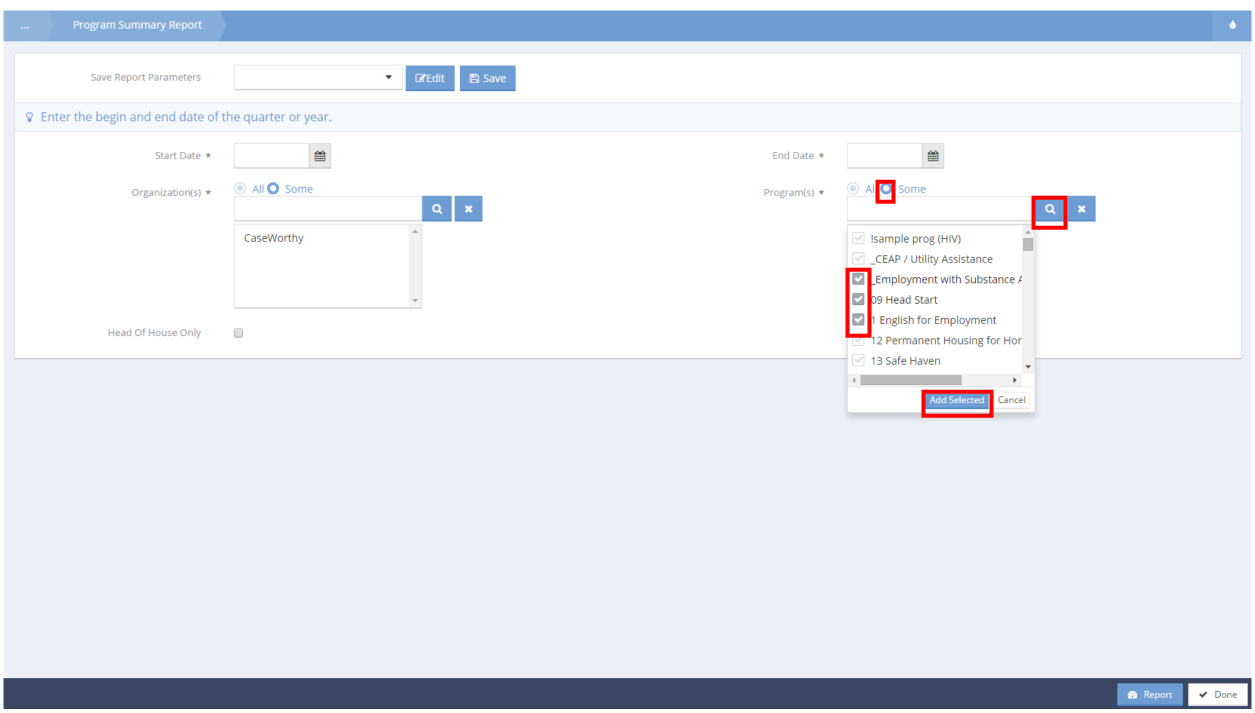


Some reports have numerous filtering options while others have very few. The date ranges are left blank, but the cascading filters are always defaulted to “All”. When filtering data, or setting up the launch criteria, always start from the top left and work over and down. The fields are set up so that they auto-filter based on the selection of the higher-level data.

For example, if only 2 programs are selected on a launch form, the list of services to choose from are automatically filtered to only include services that are associated with those programs. To select options and filter the data, first click on "Some" then click on the magnifying glass icon. A drop-down list displays. One or more options may be chosen from the list by clicking on the clear checkbox next to an item. Once all desired options have been selected, click the Add Selected button.

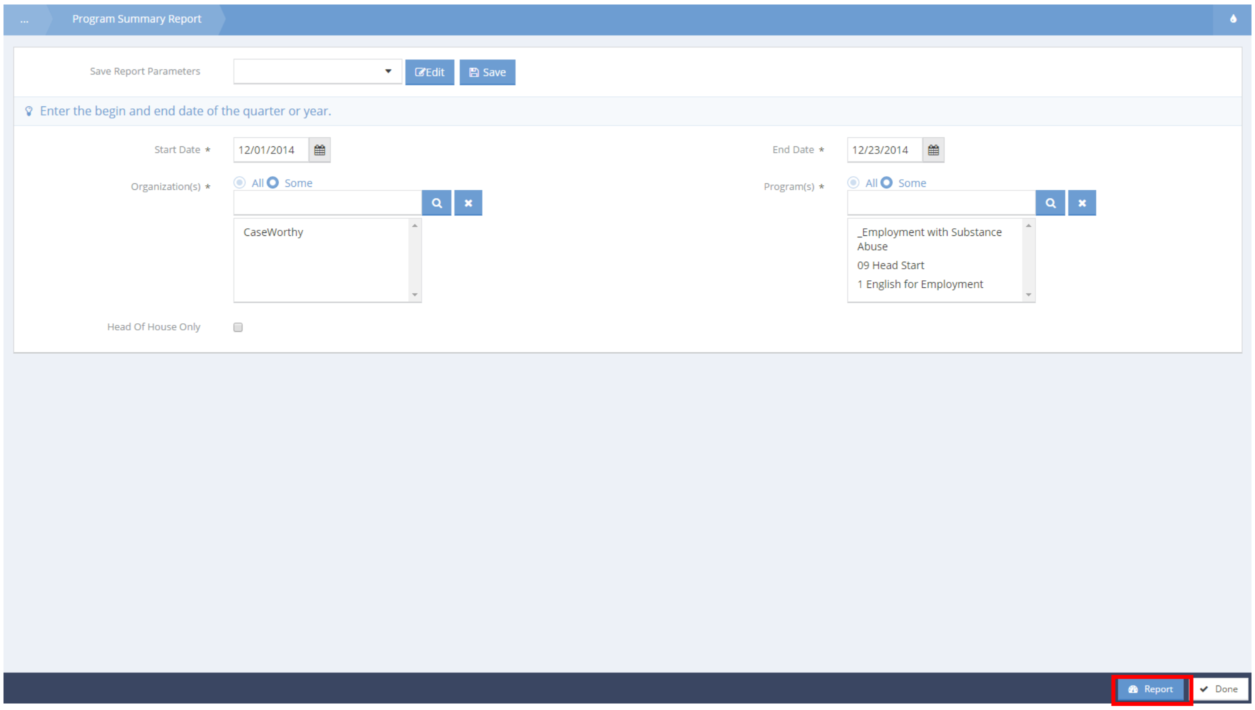


With one level of criteria set, move to the next field and make a selection. Once a field has been changed from "All" to "Some" and if "All" is the desired setting, simply click back onto "All".

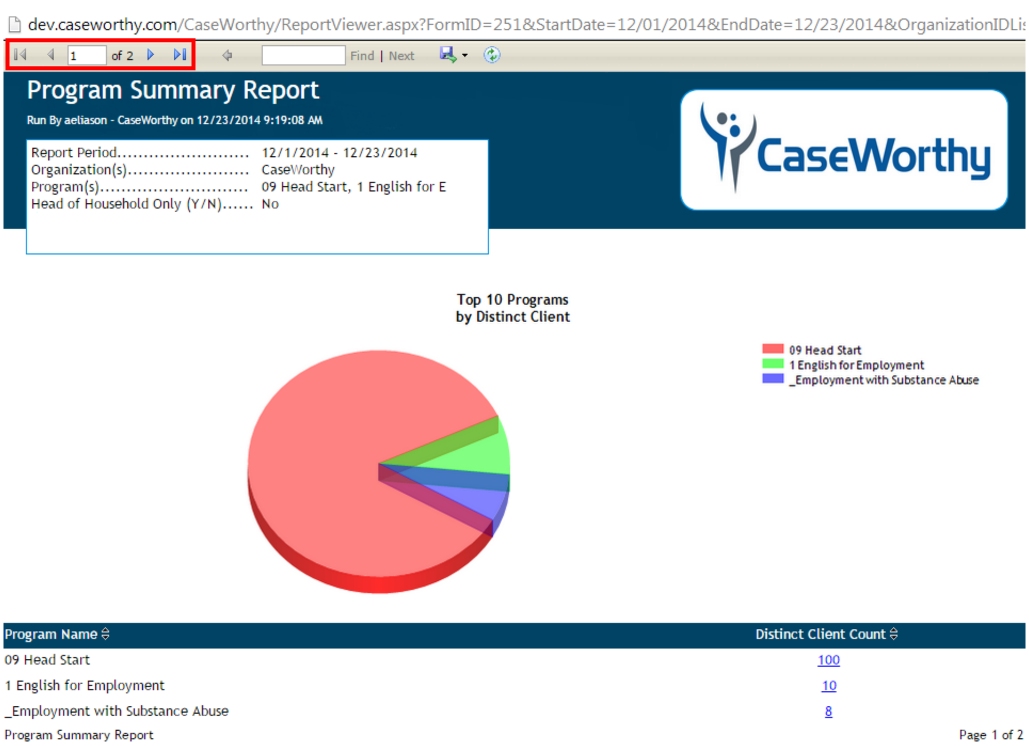


Some reports provide the option to display data for households vs. individual clients by selecting "Head of House Only". Reports display the criteria set on the last page of the report under "Report Options."

When the criteria setup is satisfactory, click on the Report button on the bottom right side of the launch form.

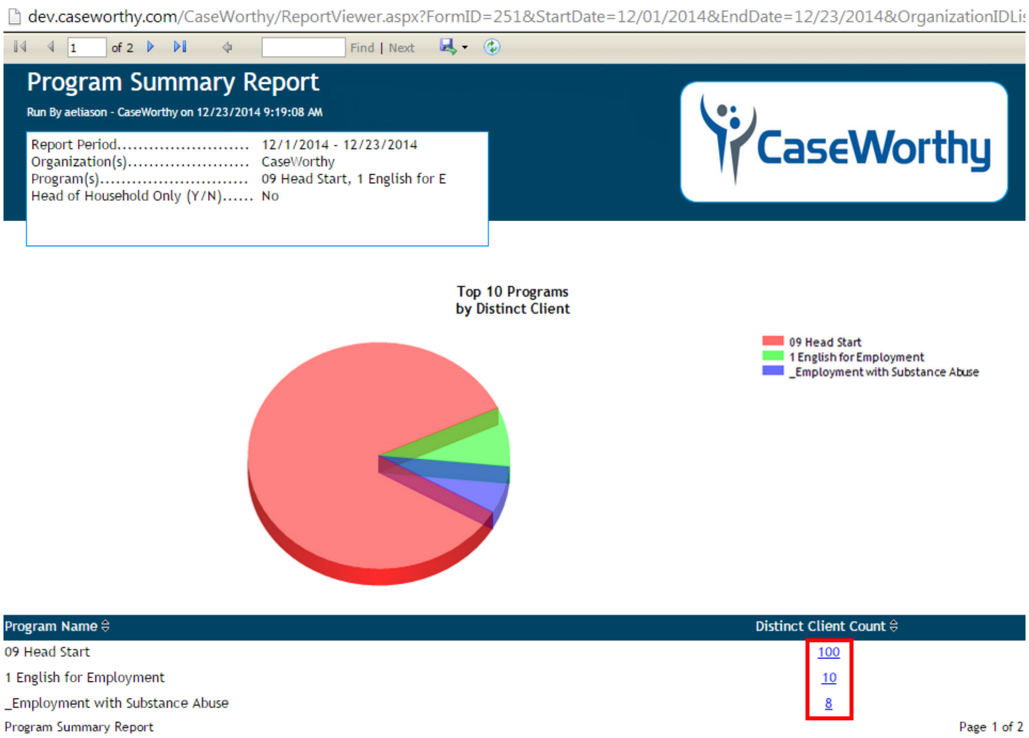


The report displays in a pop-up window.



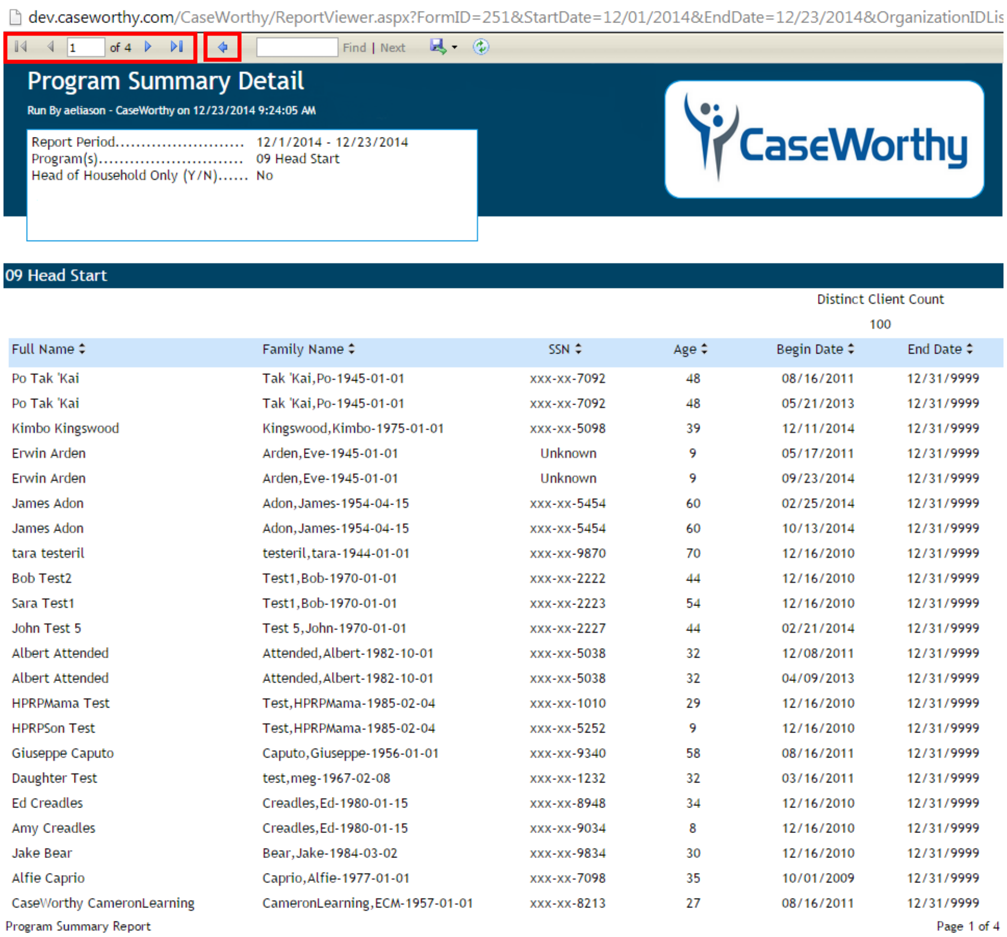
To navigate within the report, use the arrows in the navigation bar at the top of the report. In this example, use the single arrow to move to page 2, or the arrow with a bar to navigate to the end of the report (also page 2.)

To drill down and learn more about the distinct clients in a specific program, click on the hyperlink.



The sub-report renders in the pop-up window.

Navigate to additional pages in the same manner as on the main report. To leave the sub-report and return to the main report, use the small arrow to the right of the page navigation arrows.


dev.caseworthy.com/CaseWorthy/ReportViewer.aspx?FormID=251&StartDate=12/01/2014&EndDate=12/23/2014&OrganizationIDLis

1 of 4 Find | Next

Program Summary Detail

Run By aeliason - CaseWorthy on 12/23/2014 9:24:05 AM

Report Period........................ 12/1/2014 - 12/23/2014
Program(s)........................... 09 Head Start
Head of Household Only (Y/N)...... No

CaseWorthy

09 Head Start

Distinct Client Count

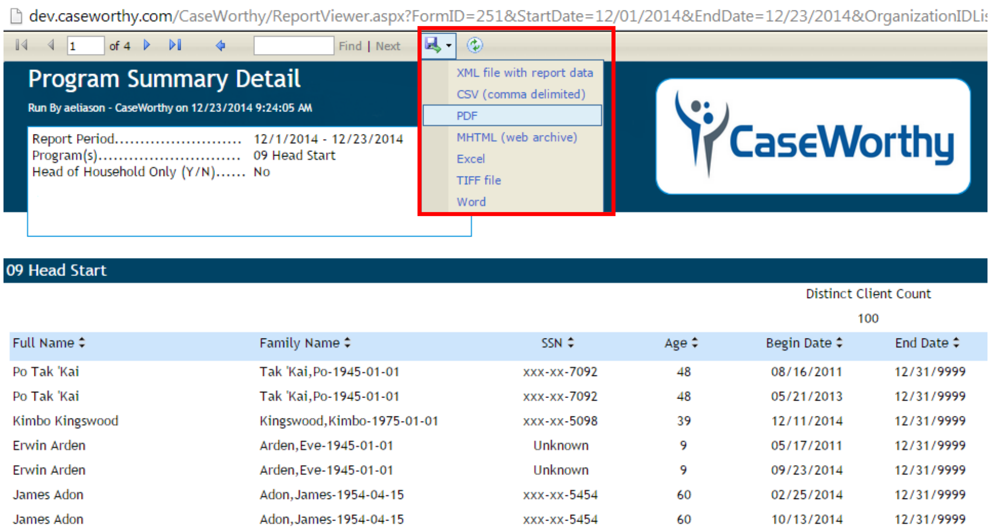
100

Full Name	Family Name	SSN	Age	Begin Date	End Date
Po Tak 'Kai	Tak 'Kai,Po-1945-01-01	xxx-xx-7092	48	08/16/2011	12/31/9999
Po Tak 'Kai	Tak 'Kai,Po-1945-01-01	xxx-xx-7092	48	05/21/2013	12/31/9999
Kimbo Kingswood	Kingswood,Kimbo-1975-01-01	xxx-xx-5098	39	12/11/2014	12/31/9999
Erwin Arden	Arden,Eve-1945-01-01	Unknown	9	05/17/2011	12/31/9999
Erwin Arden	Arden,Eve-1945-01-01	Unknown	9	09/23/2014	12/31/9999
James Adon	Adon,James-1954-04-15	xxx-xx-5454	60	02/25/2014	12/31/9999
James Adon	Adon,James-1954-04-15	xxx-xx-5454	60	10/13/2014	12/31/9999
tara testeril	testeril,tara-1944-01-01	xxx-xx-9870	70	12/16/2010	12/31/9999
Bob Test2	Test1,Bob-1970-01-01	xxx-xx-2222	44	12/16/2010	12/31/9999
Sara Test1	Test1,Bob-1970-01-01	xxx-xx-2223	54	12/16/2010	12/31/9999
John Test 5	Test 5,John-1970-01-01	xxx-xx-2227	44	02/21/2014	12/31/9999
Albert Attended	Attended,Albert-1982-10-01	xxx-xx-5038	32	12/08/2011	12/31/9999
Albert Attended	Attended,Albert-1982-10-01	xxx-xx-5038	32	04/09/2013	12/31/9999
HPRPMama Test	Test,HPRPMama-1985-02-04	xxx-xx-1010	29	12/16/2010	12/31/9999
HPRPSon Test	Test,HPRPMama-1985-02-04	xxx-xx-5252	9	12/16/2010	12/31/9999
Giuseppe Caputo	Caputo,Giuseppe-1956-01-01	xxx-xx-9340	58	08/16/2011	12/31/9999
Daughter Test	test,meg-1967-02-08	xxx-xx-1232	32	03/16/2011	12/31/9999
Ed Creadles	Creadles,Ed-1980-01-15	xxx-xx-8948	34	12/16/2010	12/31/9999
Amy Creadles	Creadles,Ed-1980-01-15	xxx-xx-9034	8	12/16/2010	12/31/9999
Jake Bear	Bear,Jake-1984-03-02	xxx-xx-9834	30	12/16/2010	12/31/9999
Alfie Caprio	Caprio,Alfie-1977-01-01	xxx-xx-7098	35	10/01/2009	12/31/9999
CaseWorthy CameronLearning	CameronLearning,ECM-1957-01-01	xxx-xx-8213	27	08/16/2011	12/31/9999

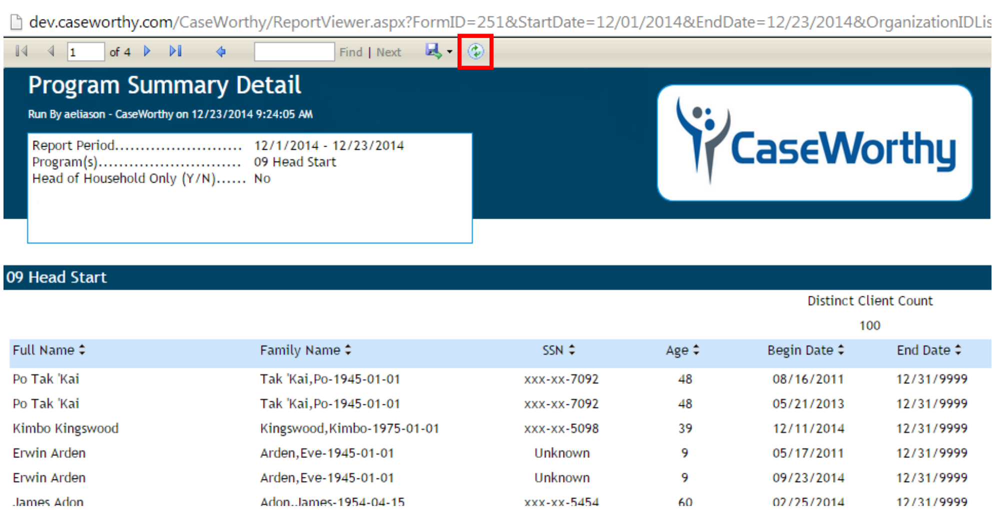
Program Summary Report Page 1 of 4

Reports can be exported in a variety of formats by clicking on the floppy disc icon, then selecting the desired export format.

By sending it to a word or excel file the layout is easily configurable to meet specific reporting needs. Alternatively, it can be easily converted to a PDF file to share data without allowing others to manipulate it.

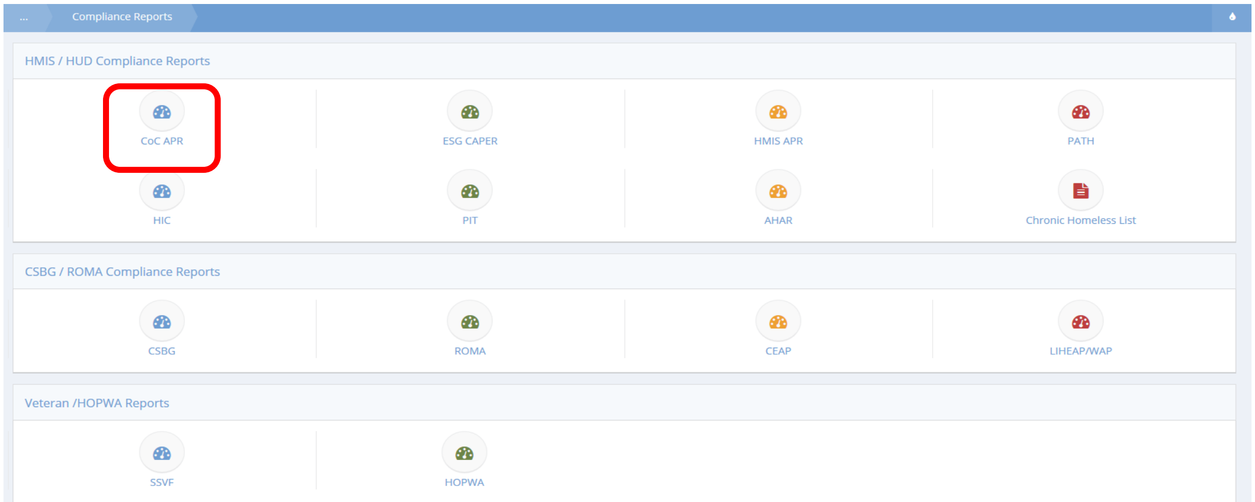


Reports may be kept open and minimized if data entry mistakes, or poor-quality data appears. Navigate to the client record or records that need adjustment and make the necessary corrections. Once corrections have been made, update the report by clicking the refresh button. The most recent, up-to-date data displays.

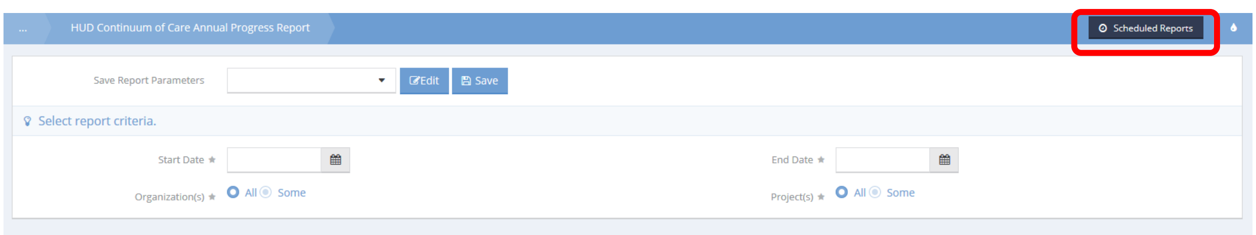


Scheduled Reports

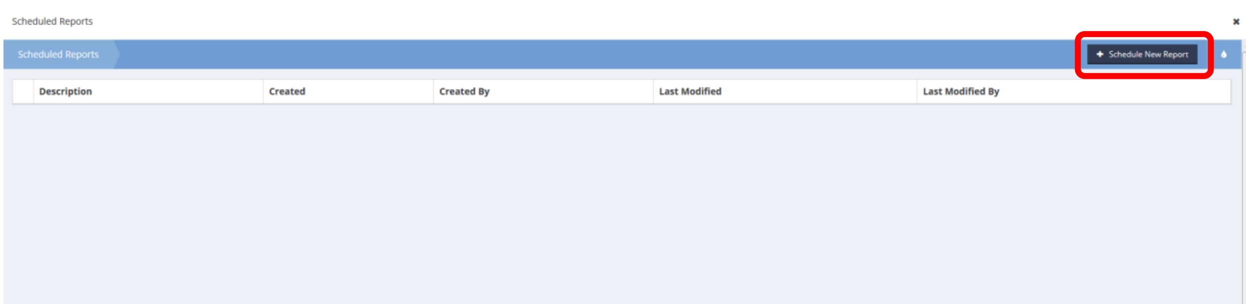
(Administration>Reporting>Compliance Reports)



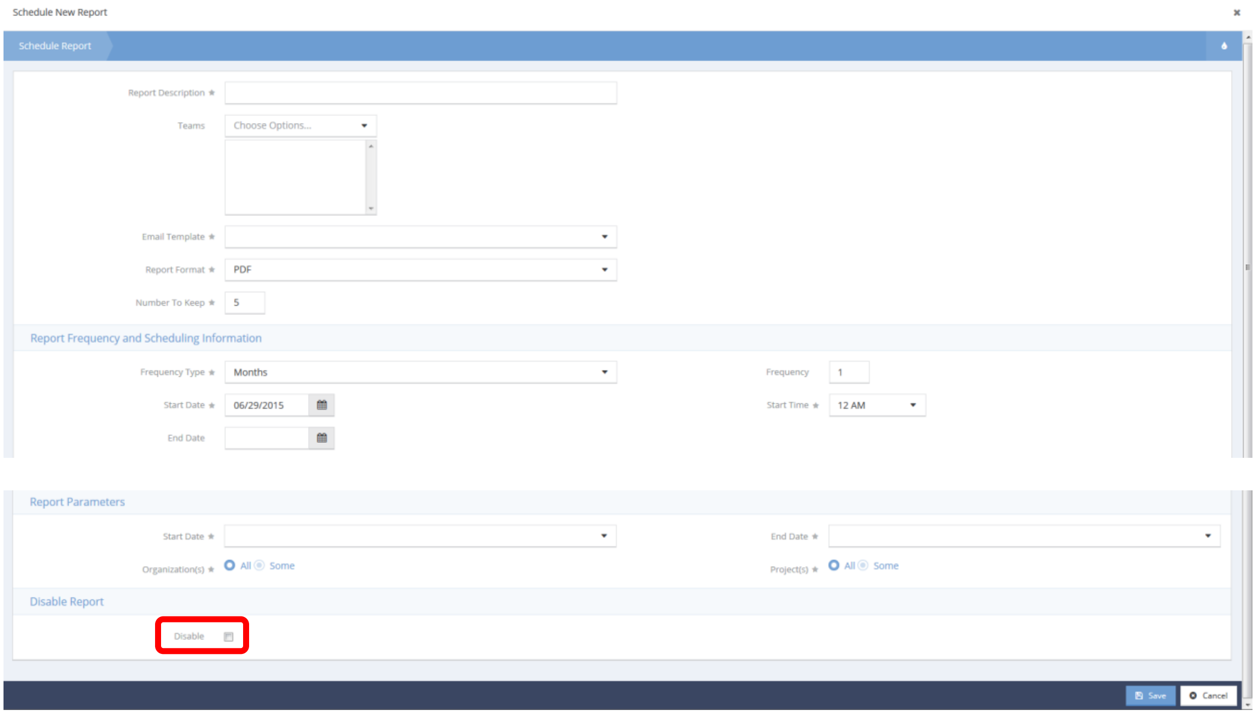
For this example, the CoC APR report is used. Click the icon for the desired report. The selected report launch form displays.



Click the Scheduled Reports button. The Scheduled Reports form displays.



To schedule a new report, click the Schedule New Report button. The Schedule Report form displays.

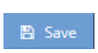


Enter a description. Select any teams desired to receive report. Select an email template and report format using the drop-down lists. Enter a number to keep.

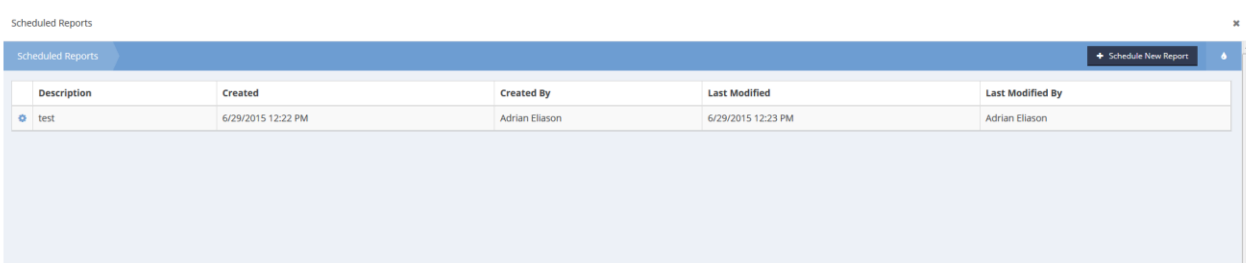
Select a frequency type, number, start date, start time and end date if necessary.

Enter report parameters. These vary based on the report being scheduled.

Finally, check the Disable checkbox to keep a report from being run. This is useful to avoid deleting a scheduled report that may be used again.

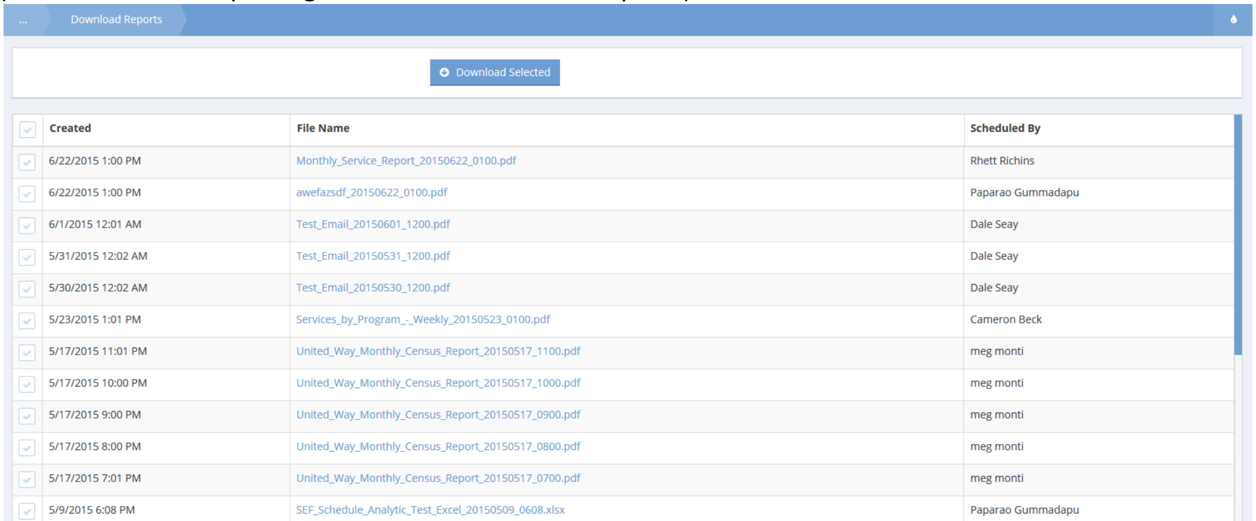
Click the 

button when finished.



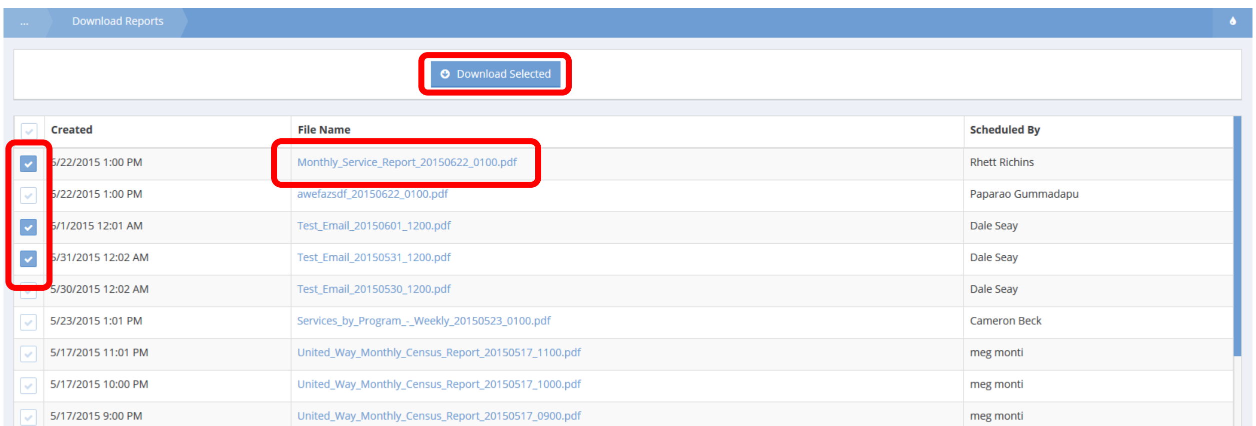
Download Reports

(Administration>Reporting>Download Scheduled Reports)



Created	File Name	Scheduled By
6/22/2015 1:00 PM	Monthly_Service_Report_20150622_0100.pdf	Rhett Richins
6/22/2015 1:00 PM	awefazsdf_20150622_0100.pdf	Paparao Gummadapu
6/1/2015 12:01 AM	Test_Email_20150601_1200.pdf	Dale Seay
5/31/2015 12:02 AM	Test_Email_20150531_1200.pdf	Dale Seay
5/30/2015 12:02 AM	Test_Email_20150530_1200.pdf	Dale Seay
5/23/2015 1:01 PM	Services_by_Program_-_Weekly_20150523_0100.pdf	Cameron Beck
5/17/2015 11:01 PM	United_Way_Monthly_Census_Report_20150517_1100.pdf	meg monti
5/17/2015 10:00 PM	United_Way_Monthly_Census_Report_20150517_1000.pdf	meg monti
5/17/2015 9:00 PM	United_Way_Monthly_Census_Report_20150517_0900.pdf	meg monti
5/17/2015 8:00 PM	United_Way_Monthly_Census_Report_20150517_0800.pdf	meg monti
5/17/2015 7:01 PM	United_Way_Monthly_Census_Report_20150517_0700.pdf	meg monti
5/9/2015 6:08 PM	SEF_Schedule_Analytic_Test_Excel_20150509_0608.xlsx	Paparao Gummadapu

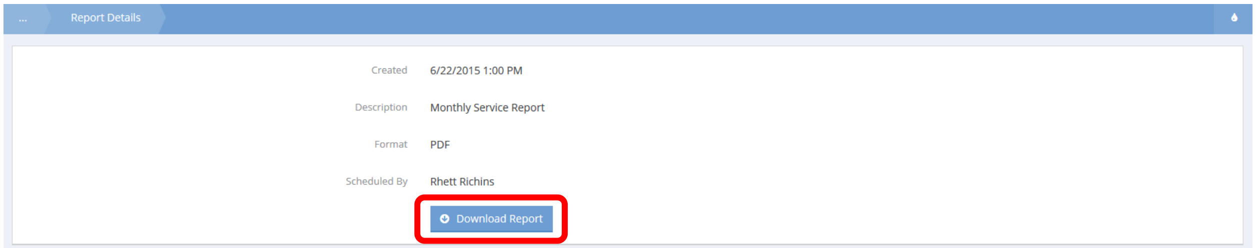
To download any scheduled reports, click the clear checkbox icon for the desired report and click the Download Selected button. The reports downloads via the browser currently being used.



Created	File Name	Scheduled By
6/22/2015 1:00 PM	Monthly_Service_Report_20150622_0100.pdf	Rhett Richins
6/22/2015 1:00 PM	awefazsdf_20150622_0100.pdf	Paparao Gummadapu
6/1/2015 12:01 AM	Test_Email_20150601_1200.pdf	Dale Seay
5/31/2015 12:02 AM	Test_Email_20150531_1200.pdf	Dale Seay
5/30/2015 12:02 AM	Test_Email_20150530_1200.pdf	Dale Seay
5/23/2015 1:01 PM	Services_by_Program_-_Weekly_20150523_0100.pdf	Cameron Beck
5/17/2015 11:01 PM	United_Way_Monthly_Census_Report_20150517_1100.pdf	meg monti
5/17/2015 10:00 PM	United_Way_Monthly_Census_Report_20150517_1000.pdf	meg monti
5/17/2015 9:00 PM	United_Way_Monthly_Census_Report_20150517_0900.pdf	meg monti

To view details of a specific report, click the blue hyperlinked text for the desired report.

The Report Details form displays.

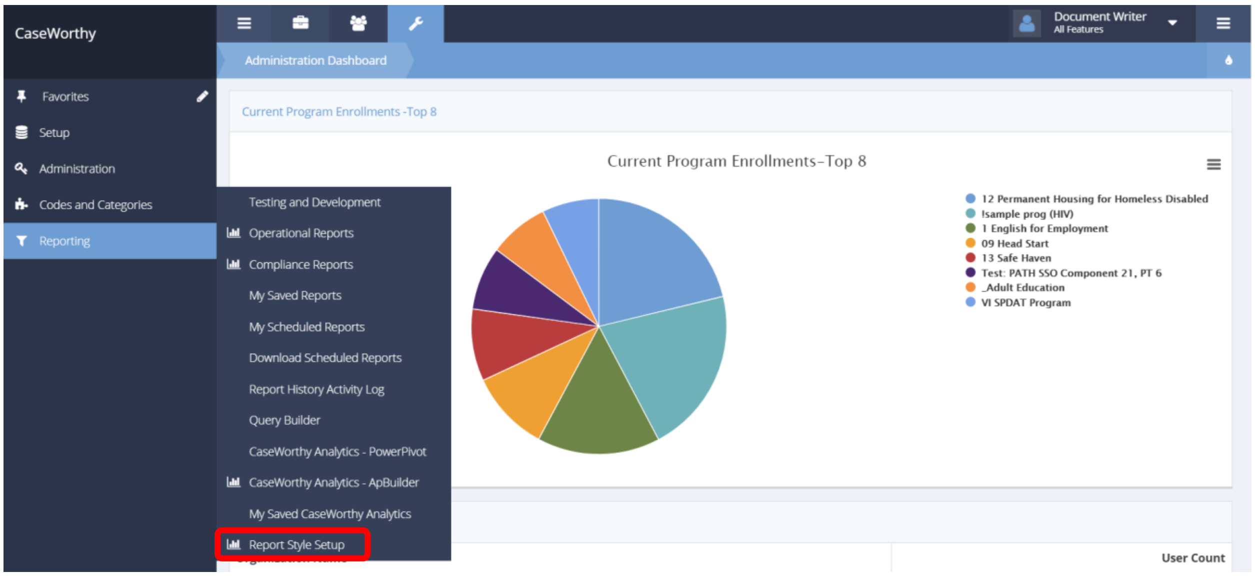


To download the currently selected report, click the Download Report button. The report downloads via the browser currently being used.

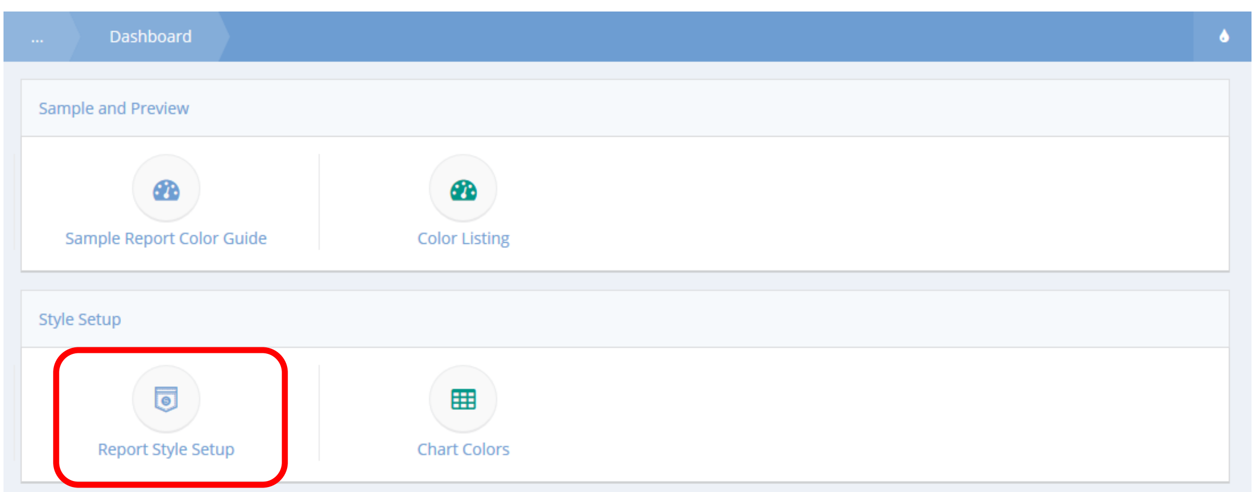
Report Style Setup

Objective: This form serves to alter select properties of reports that have the styles setup.

Navigation: Administration>Reporting>Report Style Setup>Report Theme Colors

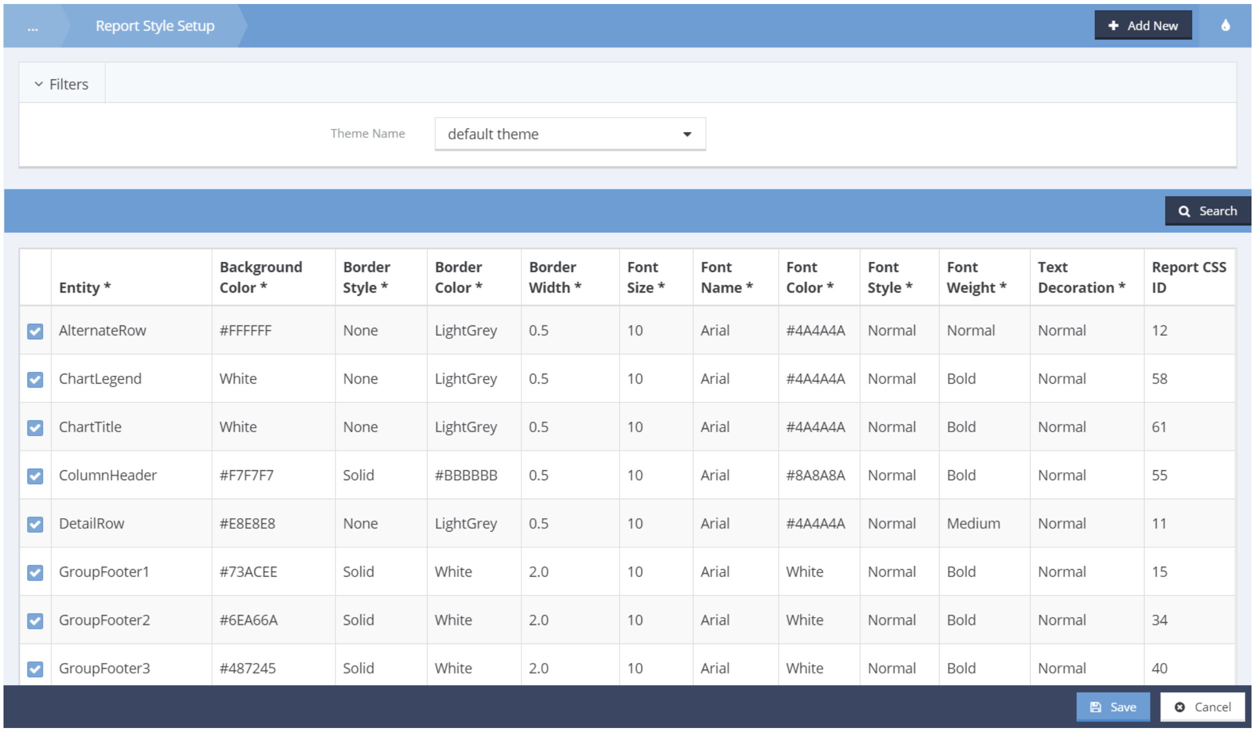


Under the Administration tab, select Reporting. Select Report Style Setup from the pop-up menu that appears. The Report Style Setup dashboard displays.



Click on the icon labeled Report Style Setup.

The Report Style Setup form appears.



... Report Style Setup | Add New

Filters

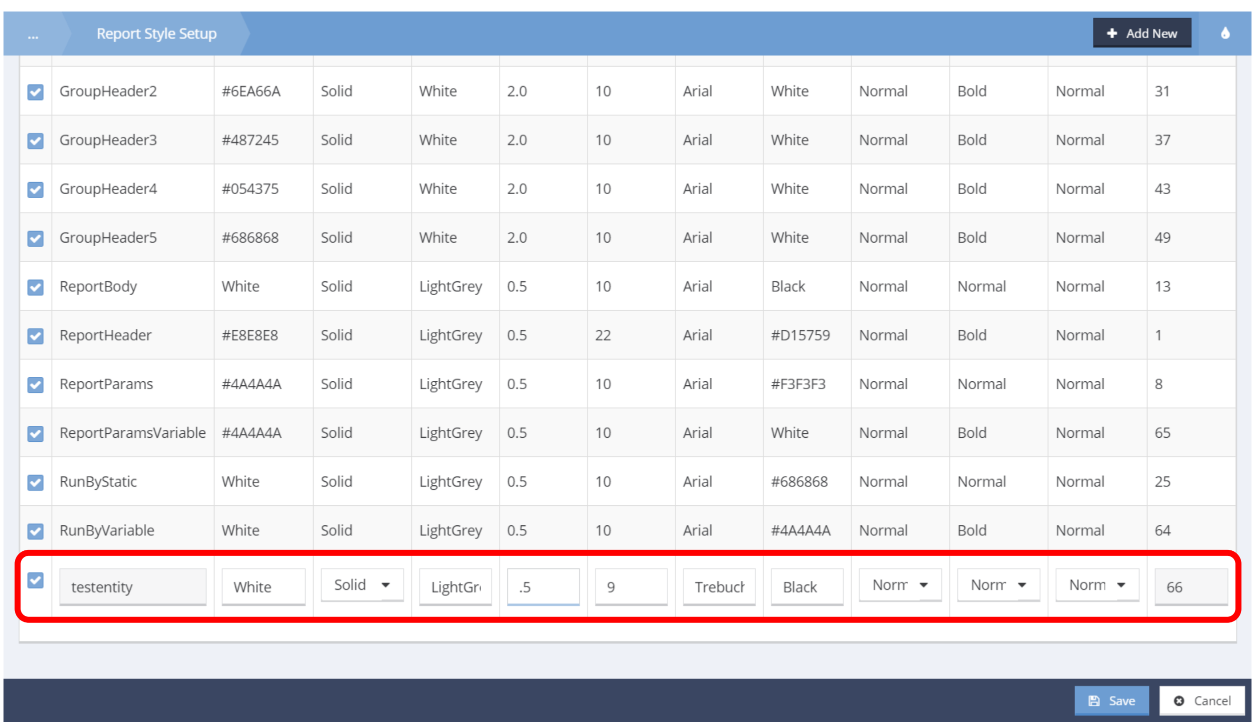
Theme Name: default theme

Search

	Entity *	Background Color *	Border Style *	Border Color *	Border Width *	Font Size *	Font Name *	Font Color *	Font Style *	Font Weight *	Text Decoration *	Report CSS ID
☑	AlternateRow	#FFFFFF	None	LightGrey	0.5	10	Arial	#4A4A4A	Normal	Normal	Normal	12
☑	ChartLegend	White	None	LightGrey	0.5	10	Arial	#4A4A4A	Normal	Bold	Normal	58
☑	ChartTitle	White	None	LightGrey	0.5	10	Arial	#4A4A4A	Normal	Bold	Normal	61
☑	ColumnHeader	#F7F7F7	Solid	#BBBBBB	0.5	10	Arial	#8A8A8A	Normal	Bold	Normal	55
☑	DetailRow	#E8E8E8	None	LightGrey	0.5	10	Arial	#4A4A4A	Normal	Medium	Normal	11
☑	GroupFooter1	#73ACEE	Solid	White	2.0	10	Arial	White	Normal	Bold	Normal	15
☑	GroupFooter2	#6EA66A	Solid	White	2.0	10	Arial	White	Normal	Bold	Normal	34
☑	GroupFooter3	#487245	Solid	White	2.0	10	Arial	White	Normal	Bold	Normal	40

Save | Cancel

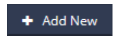
To edit an existing entity, click on the ☑ icon. The row expands to enable editing for each element of the entity.

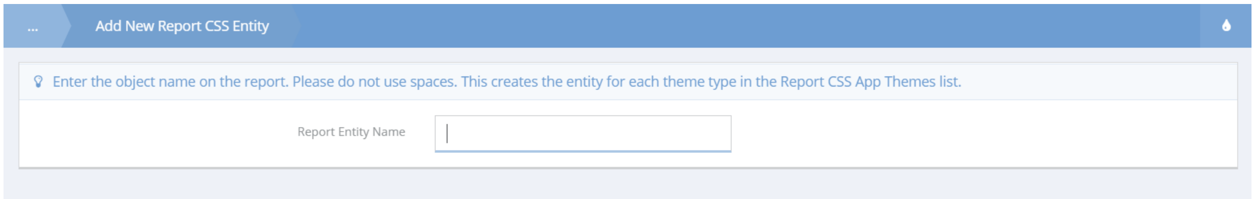


... Report Style Setup | Add New

☑	GroupHeader2	#6EA66A	Solid	White	2.0	10	Arial	White	Normal	Bold	Normal	31
☑	GroupHeader3	#487245	Solid	White	2.0	10	Arial	White	Normal	Bold	Normal	37
☑	GroupHeader4	#054375	Solid	White	2.0	10	Arial	White	Normal	Bold	Normal	43
☑	GroupHeader5	#686868	Solid	White	2.0	10	Arial	White	Normal	Bold	Normal	49
☑	ReportBody	White	Solid	LightGrey	0.5	10	Arial	Black	Normal	Normal	Normal	13
☑	ReportHeader	#E8E8E8	Solid	LightGrey	0.5	22	Arial	#D15759	Normal	Bold	Normal	1
☑	ReportParams	#4A4A4A	Solid	LightGrey	0.5	10	Arial	#F3F3F3	Normal	Normal	Normal	8
☑	ReportParamsVariable	#4A4A4A	Solid	LightGrey	0.5	10	Arial	White	Normal	Bold	Normal	65
☑	RunByStatic	White	Solid	LightGrey	0.5	10	Arial	#686868	Normal	Normal	Normal	25
☑	RunByVariable	White	Solid	LightGrey	0.5	10	Arial	#4A4A4A	Normal	Bold	Normal	64
☑	testentity	White	Solid	LightGr	.5	9	Trebuch	Black	Norm	Norm	Norm	66

Save | Cancel

To add a new style control entity, click the  button. The Add New Report CSS Entity form appears.

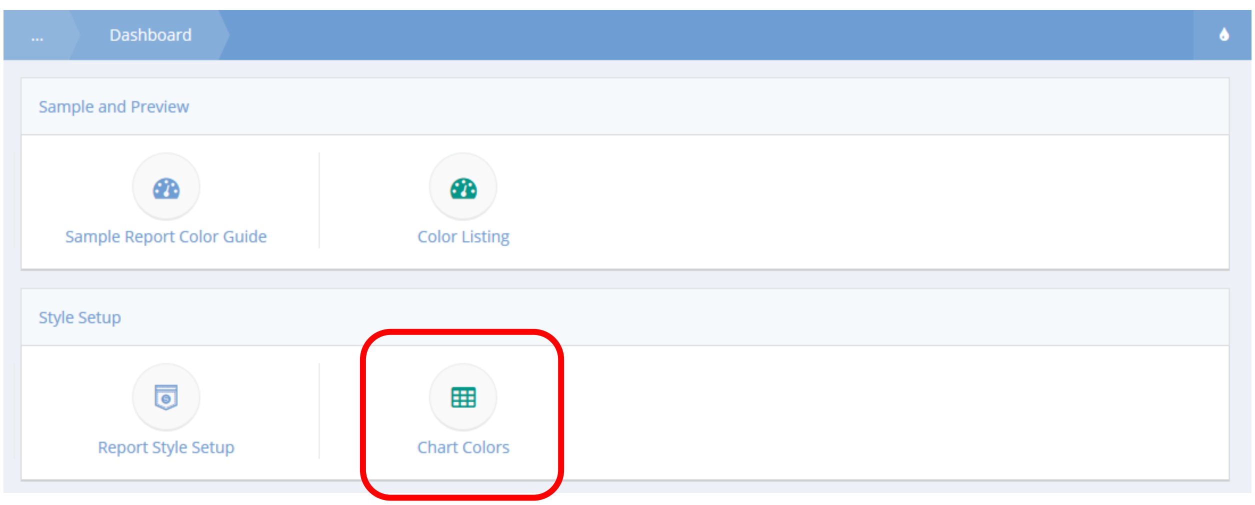


Enter a name for the entity and click the  button. The new entity now appears on the Report Style Setup form. Click the  icon to expand its row and enable editing. Click the  button to exit the form.

Report Chart Colors

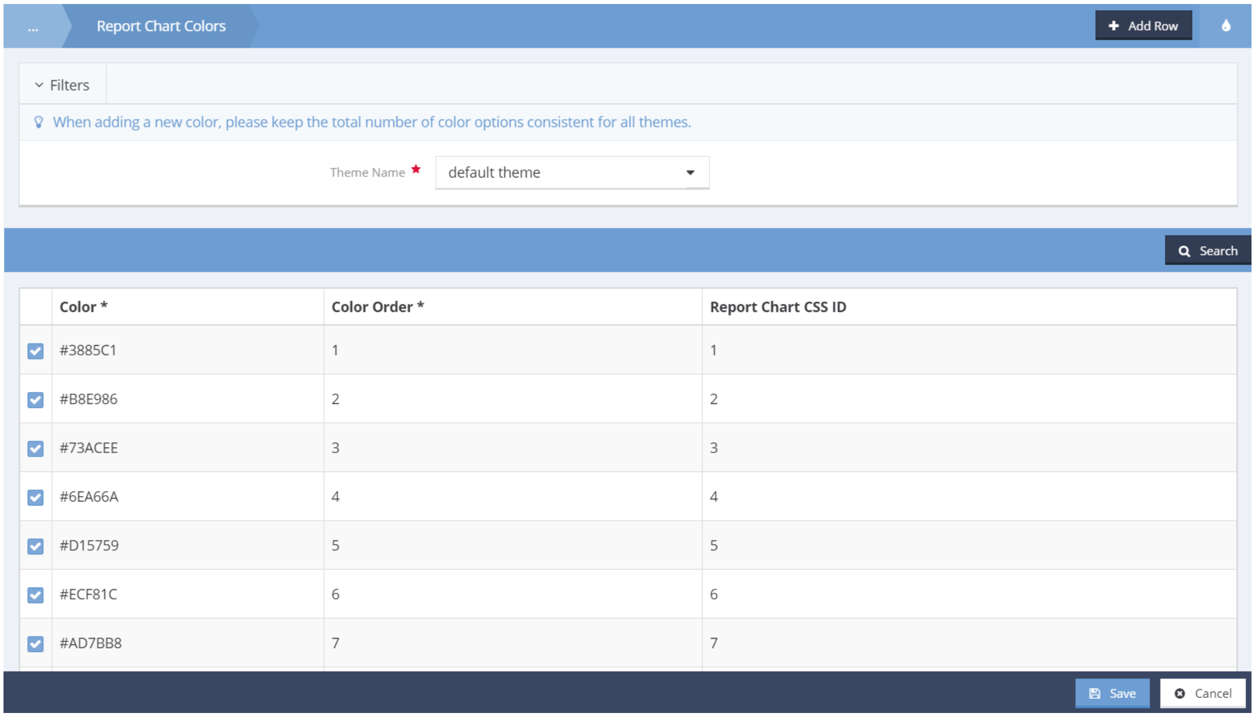
Objective: Set colors to be used in charts on the new styled reports.

Navigation: Administration>Reporting>Report Style Setup>Chart Colors



From the Report Style Setup dashboard, click on the icon labeled Chart Colors.

The Report Chart Colors form appears.

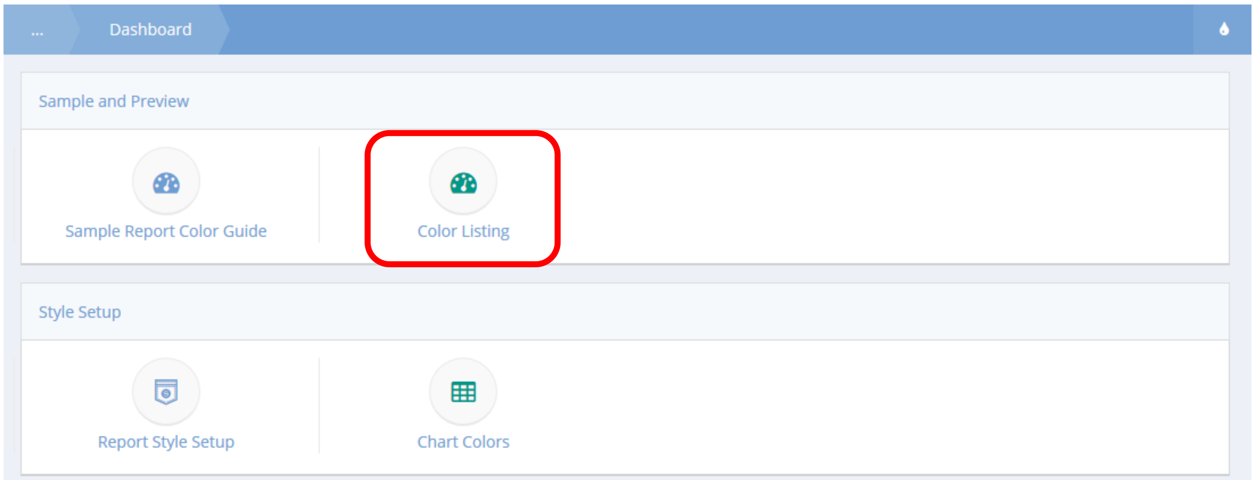


Select a theme by using the drop-down arrow. To edit a color, click the icon. The field expands to enable editing. Click the Save button to save changes and exit the form.

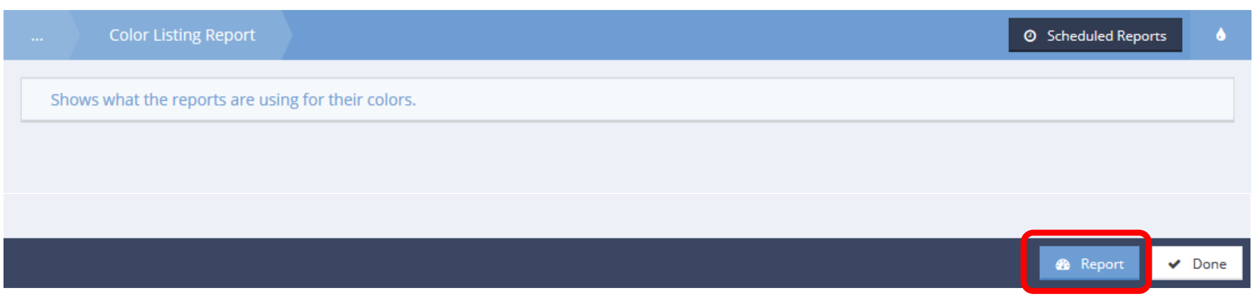
Report Color Listing

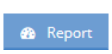
Objective: Launch form to show a report that allows the user to see all the control settings and colors selected for those report styles.

Navigation: Administration>Reporting>Report Style Setup>Color Listing



From the Report Style Setup dashboard, click on the Color Listing icon.

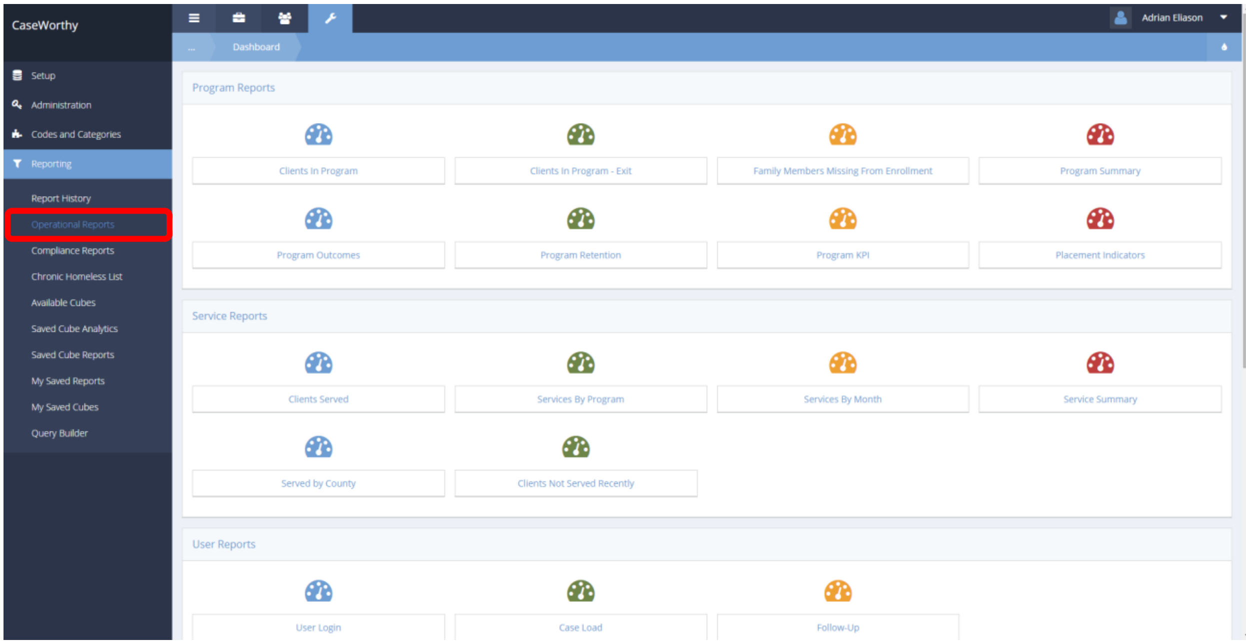


Click the 

button to launch the report that displays which colors are being used for various reports.

Operational Reports

(Administration>Reporting>Operational Reports)



Report Descriptions

Goal Outcomes – to view outcome accomplishment by Goal, link outcomes to client goals.

Clients in Program – This simple spreadsheet provides enrollment information on all clients who have a program enrollment within a specific, selected program.

Program Outcomes – This report allows the user to view outcomes by domain, with totals. The report includes a sub-report which includes more specific information regarding the outcome scores.

Program Retention – this report displays counts of the number of people currently enrolled at the beginning of each month, the number of new enrollments for the month, and the number who exited during the month. There is no sub-report to drill down on the data, but a color-coded graph is included.

Program Summary – This report displays the total amount of service provided for each service selected in the launch criteria. A drill down report provides information on the client receiving the service, their SSN, the user/case manager who provided/logged the service, as well as the date, the number of units of service received and the total service received.

User Login – A list of users who have logged into the system within the defined time-frame that indicates the user's status, total logins, last login, last logoff, total duration of time in the system and average duration. A drill down provides details related to each login. Pie charts at the top of the report depict top 10 users by duration and top 10 users by logins.

Case Load – A list of case managers/users is displayed with numbers of case assignments, unduplicated clients, active clients and inactive clients. A drill down report provides the names, SSN, and age of the clients who have been assigned, as well as the begin date, end date and status of their program enrollment. To display on this list, the client must be assigned to a user/case manager using the Case Assignment functionality in CaseWorthy™.

Follow Up – In cases where case managers/users utilize the "Schedule Follow Up" functionality, such as for retention of employment or housing placement, this report provides a summary of all scheduled follow ups, their target date, and status.

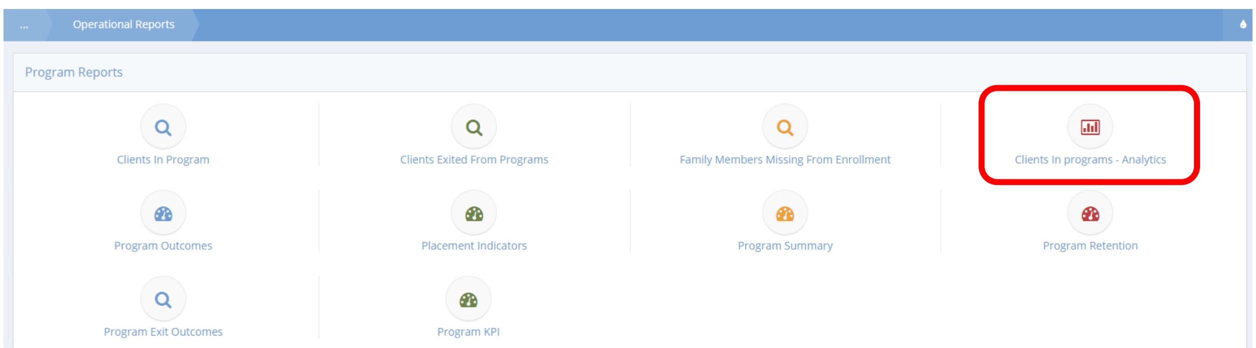
Check Register – If CaseWorthy™ is used to cut checks to vendors for utility assistance or other services, this report provides an accounting of payments made.

A/R Aging – When CaseWorthy™ is used to track billing of and payments by clients for services received, this report provides a summary of over-due payments in 30, 60, 90 and 90+ day increments.

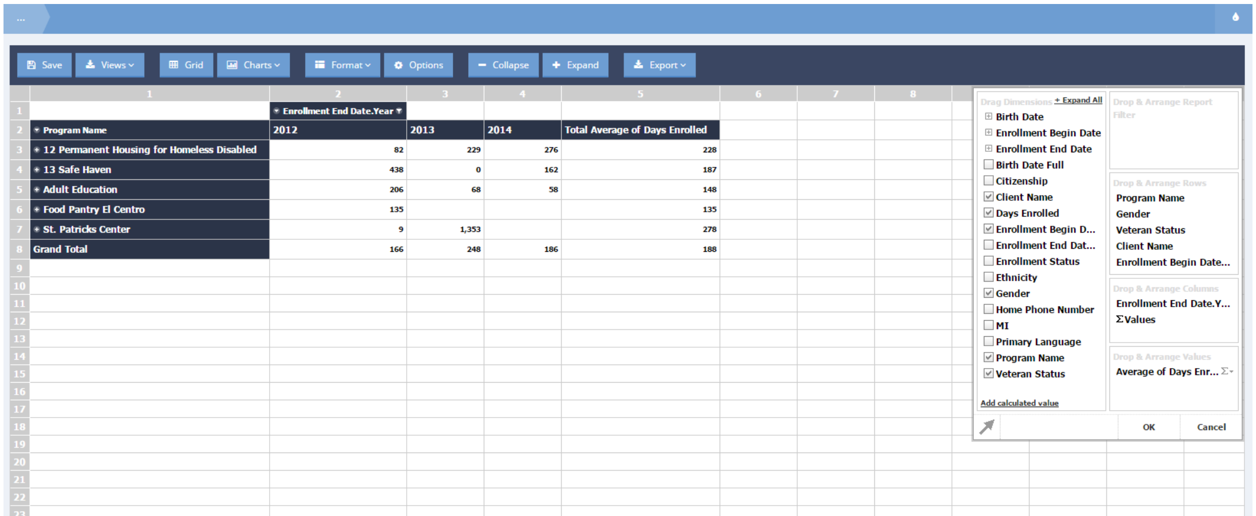
Program Exit Outcomes – A list of clients who have exited programs with outcome scores.

Clients In Program (Render as Pivot)

(Administration>Reporting>Operational Reports)



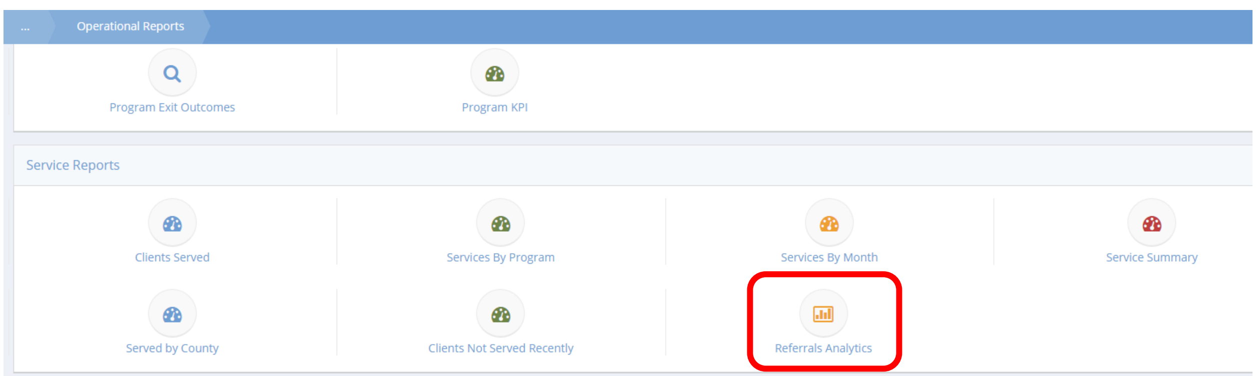
Click the icon for Clients In programs – Analytics. The Client in Program pivot table displays.



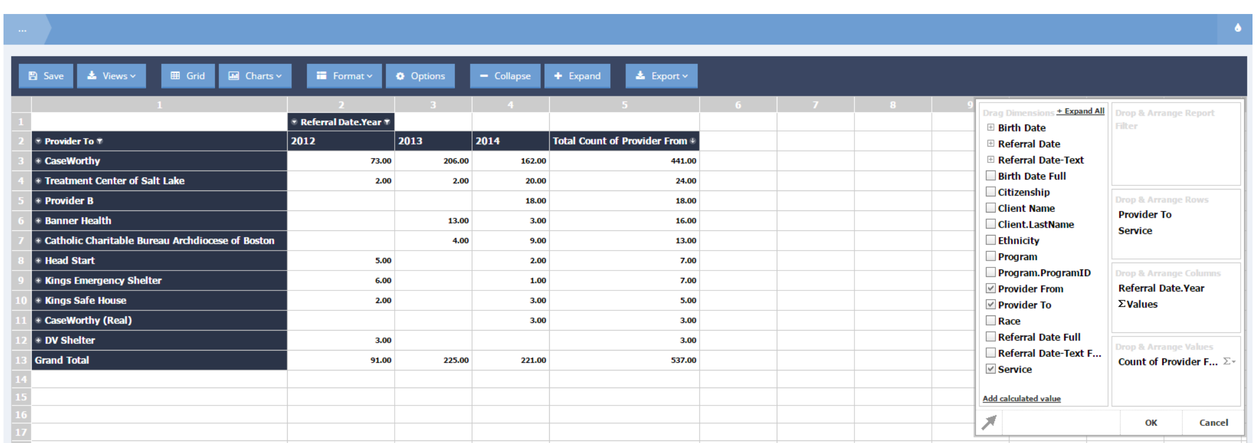
Note: For more information on using pivot tables in CaseWorthy Analytics, refer to the CaseWorthy Analytics section in this document.

Referrals by Type (Analytics)

(Administration>Reporting>Operational Reports)



Click the icon for Referrals Analytics. The Referrals by Type (Analytics) form displays.

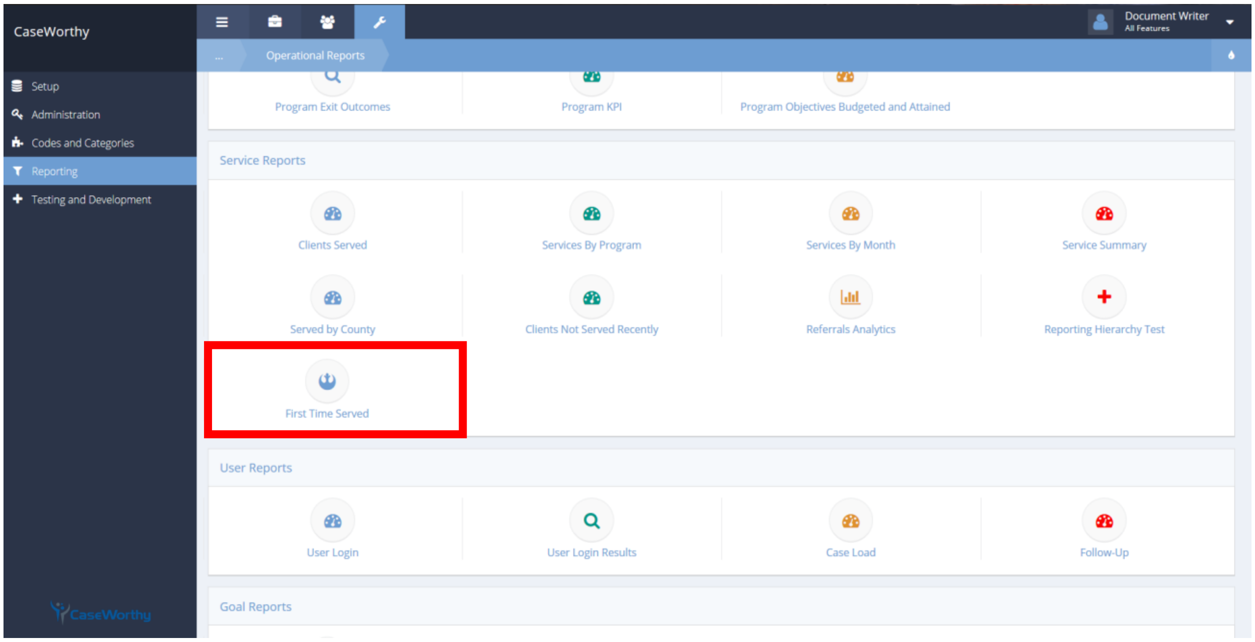


Note: For more information on using pivot tables in CaseWorthy Analytics, refer to the CaseWorthy Analytics section in this document.

First Time Served Report

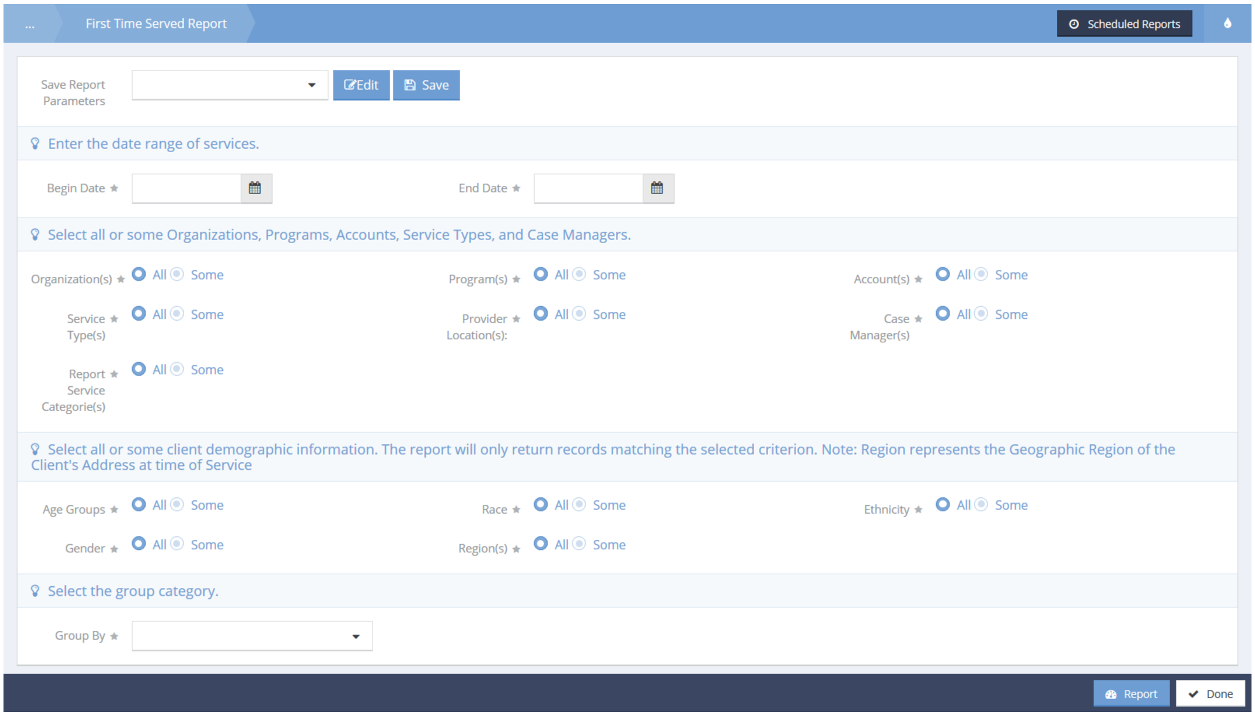
Objective: Launch first time served reports.

Navigation: Administration>Reporting>Operational Reports



Select First Time Served from the Service Reports section of the Operational reports dashboard.

The First Time Served Report launch form displays.



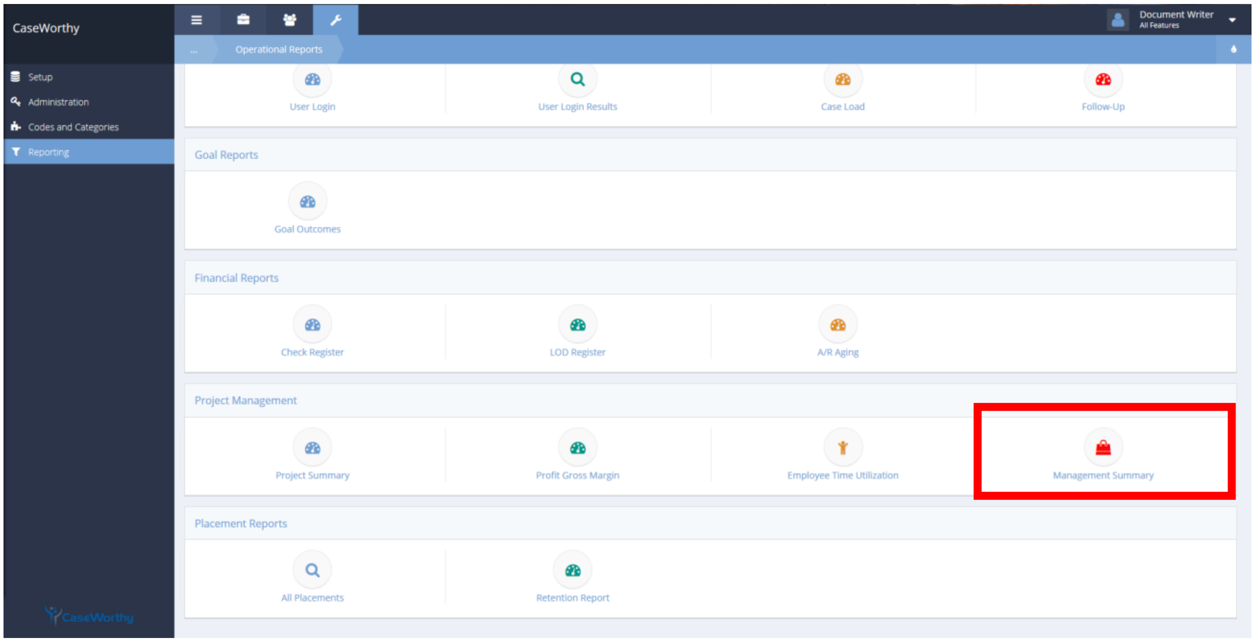
Select a begin and end date for which the report should run. Select desired report parameters, either All or Some, and finally, select a category to group data by. Click the Report button to launch the report. The report displays in a new pop-up window. Click the Done button when finished.

Note: To save these report parameters, choose an existing report or click the* Save *button associated with the Save Report Parameters field. To Schedule this report to run automatically, click the* Scheduled Reports *button.

Management Summary Report

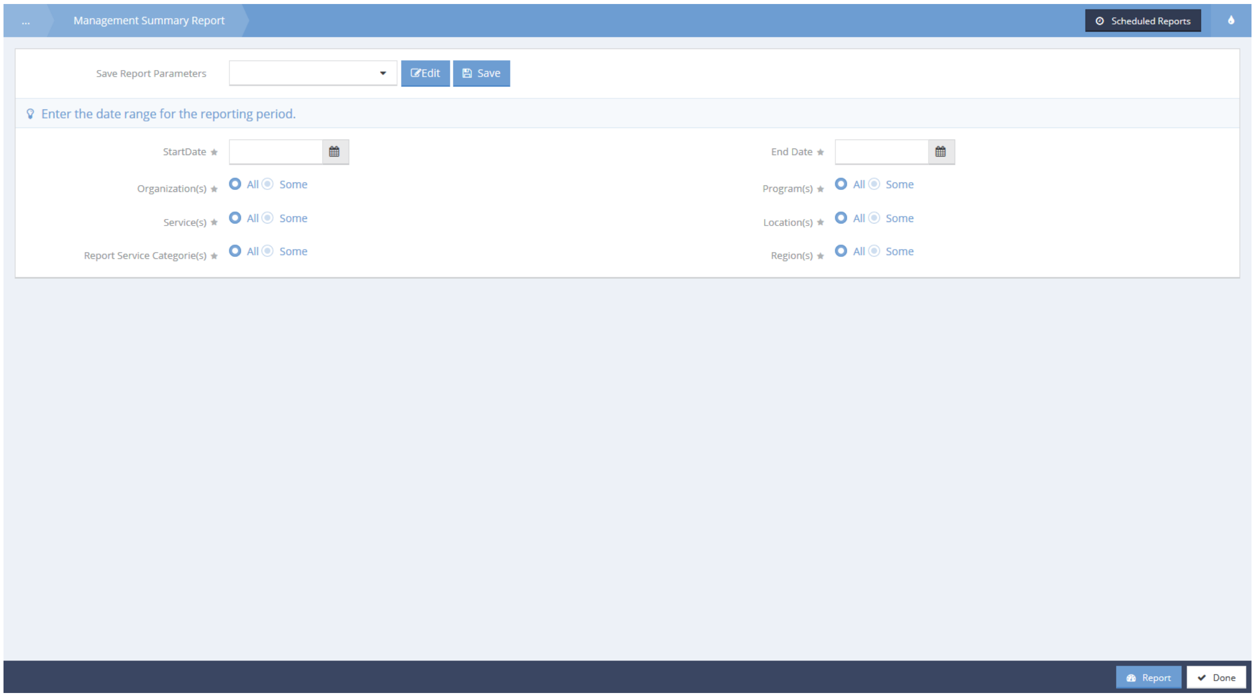
Objective: Launch Management Summary report.

Navigation: Administration>Reporting>Operational Reports



Select Management Summary from the Project Management portion of the Operational Reports dashboard.

The Management Summary Report form displays.



Select a start and end date for which the report should run. Select desired report parameters, either All or Some. Click the Report button to launch the report. The report displays in a new pop-up window. Click the Done button when finished.

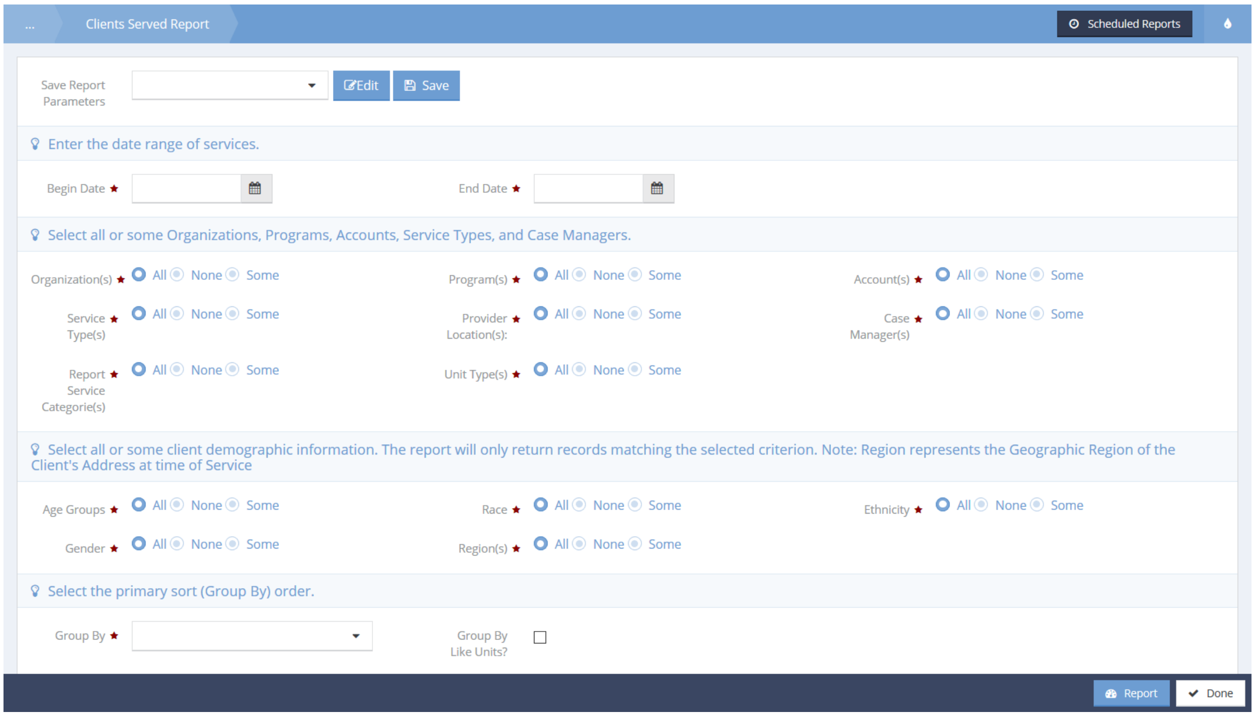
Note: To save these report parameters, choose an existing report or click the Save ***button associated with the Save Report Parameters field. To Schedule this report to run automatically, click the*** Scheduled Reports ***button.***

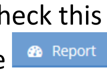
Clients Served

Objective: Launch the Clients Served v7.0 report.

Navigation: Administration>Reporting>Operational Reports>Clients Served V 7.0

The Clients Served Report form displays.



Launch like the traditional Clients Served Report. A date range and myriad of parameters are required to be set. This form contains a "Group By Like Units?" checkbox. Check this box to have the items in the report grouped by units (days, hours, each, dollar, etc.) Click the 

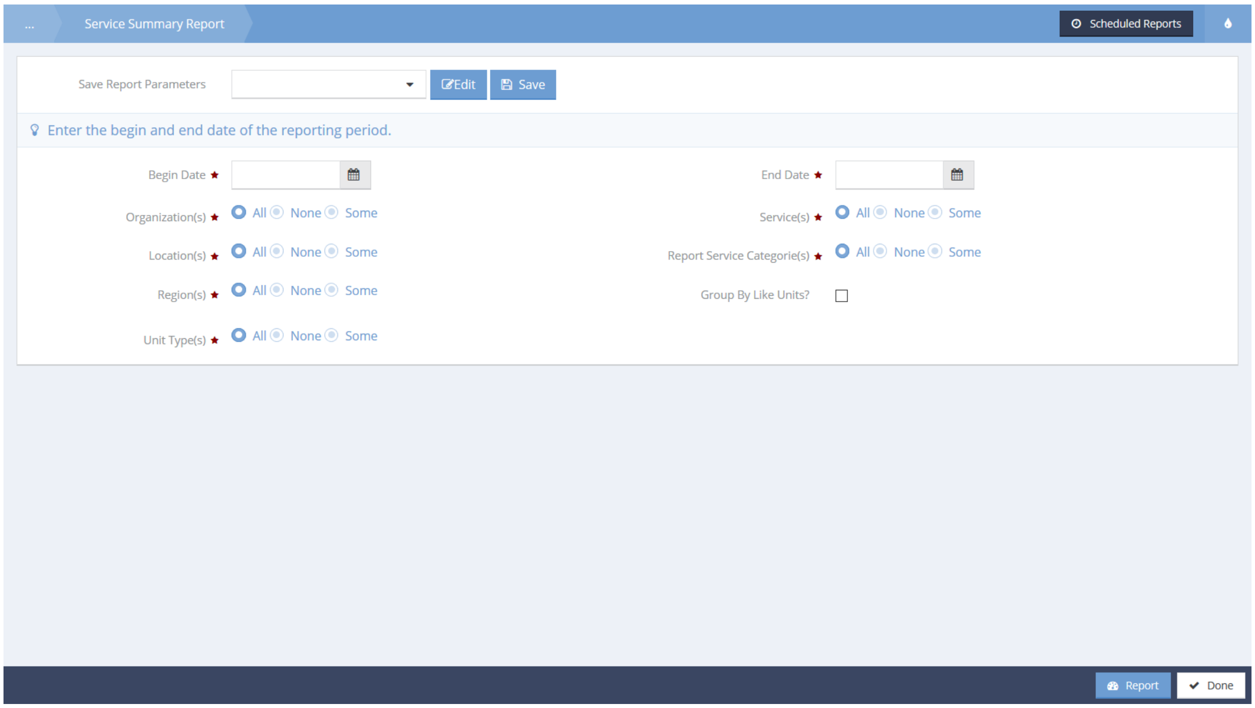
button to launch.

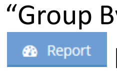
Service Summary

Objective: Launch the Service Summary v7.0 report.

Navigation: Administration>Reporting>Operational Reports>Service Summary V 7.0

The Service Summary Report form displays.



Launch like the traditional Service Summary report. A date range and myriad of parameters are required to be set. The "Unit Type(s)" parameter is new, select which units (days, hours, each, dollar, etc.) to include on the form. This form also contains a "Group By Like Units?" field. Check this box to have the items in the report grouped by units. Click the 

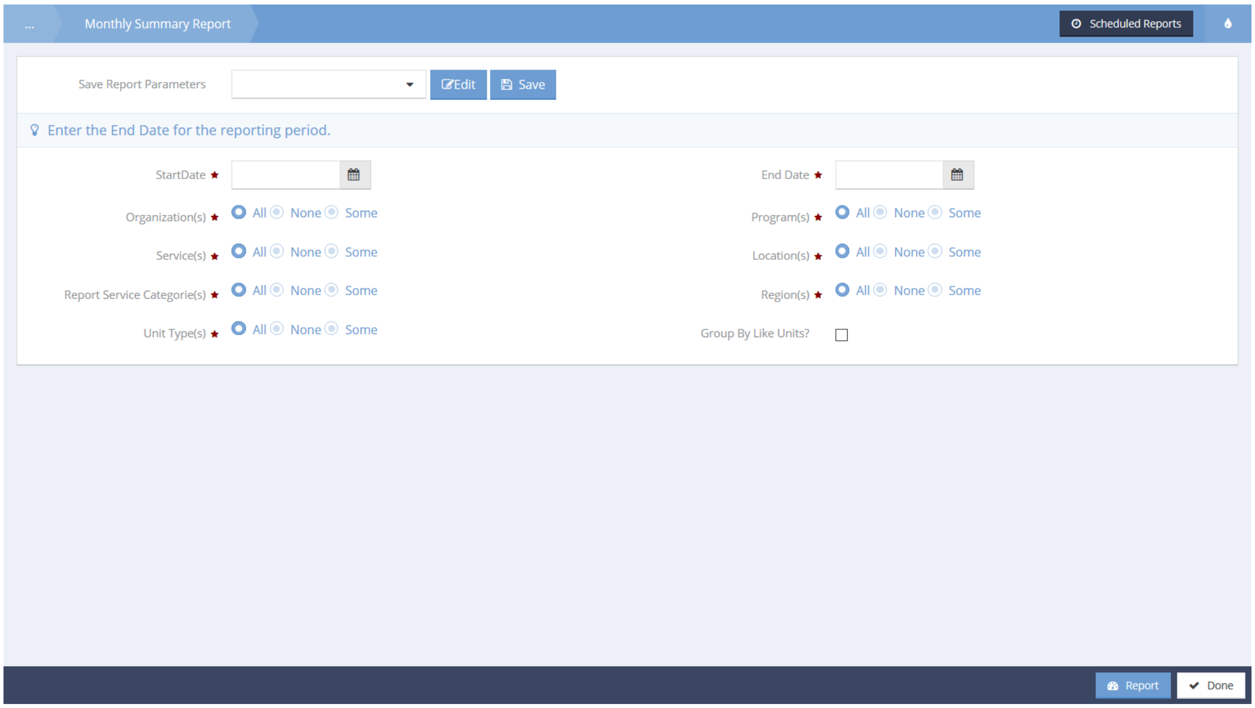
button to launch.

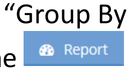
Monthly Service Summary

Objective: Launch the Monthly Service Summary v7.0 report.

Navigation: Administration>Reporting>Operational Reports>Services By Month V 7.0

The Monthly Service Summary Report form displays.



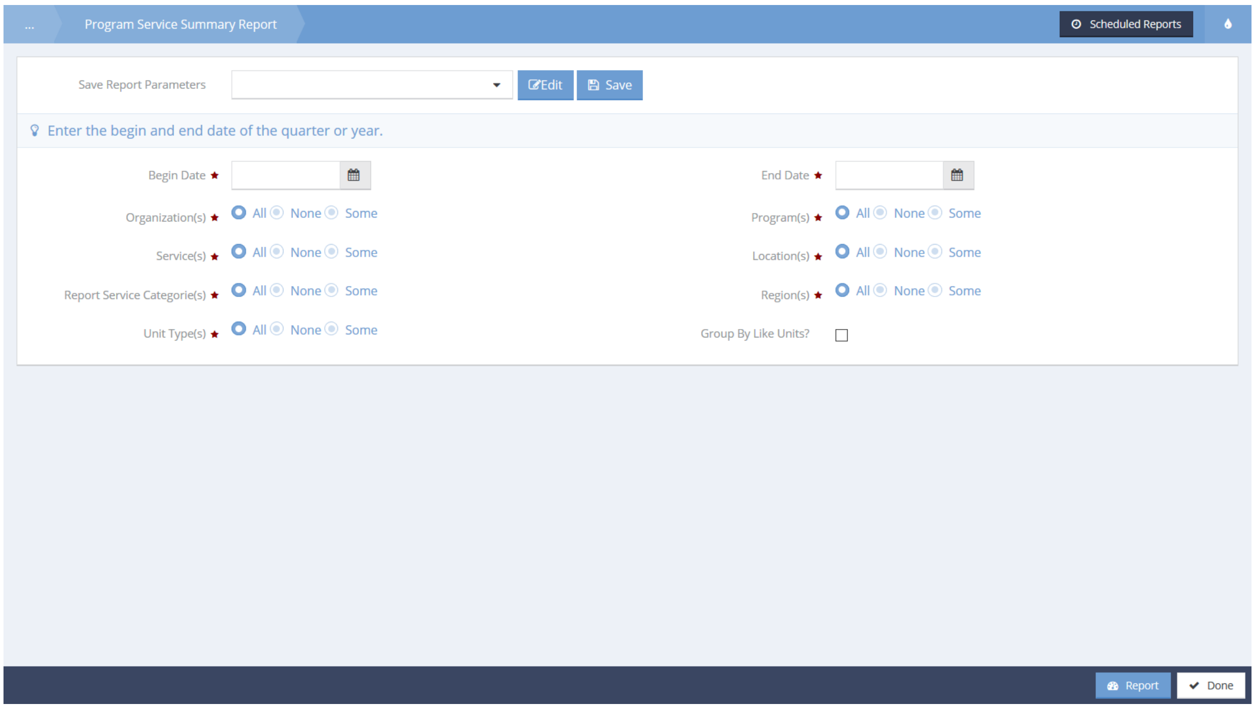
Launch like the traditional Services By Month report. A date range and myriad of parameters are required to be set. The “Unit Type(s)” parameter is new, select which units (days, hours, each, dollar, etc.) to include on the form. This form also contains a “Group By Like Units?” field. Check this box to have the items in the report grouped by units. Click the  button to launch.

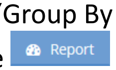
Program Service Summary

Objective: Launch the Program Service Summary v7.0 report.

Navigation: Administration>Reporting>Operational Reports>Services By Program V 7.0

The Program Service Summary Report form displays.
ProgramServiceSummaryReport_V_7_0 (9458)

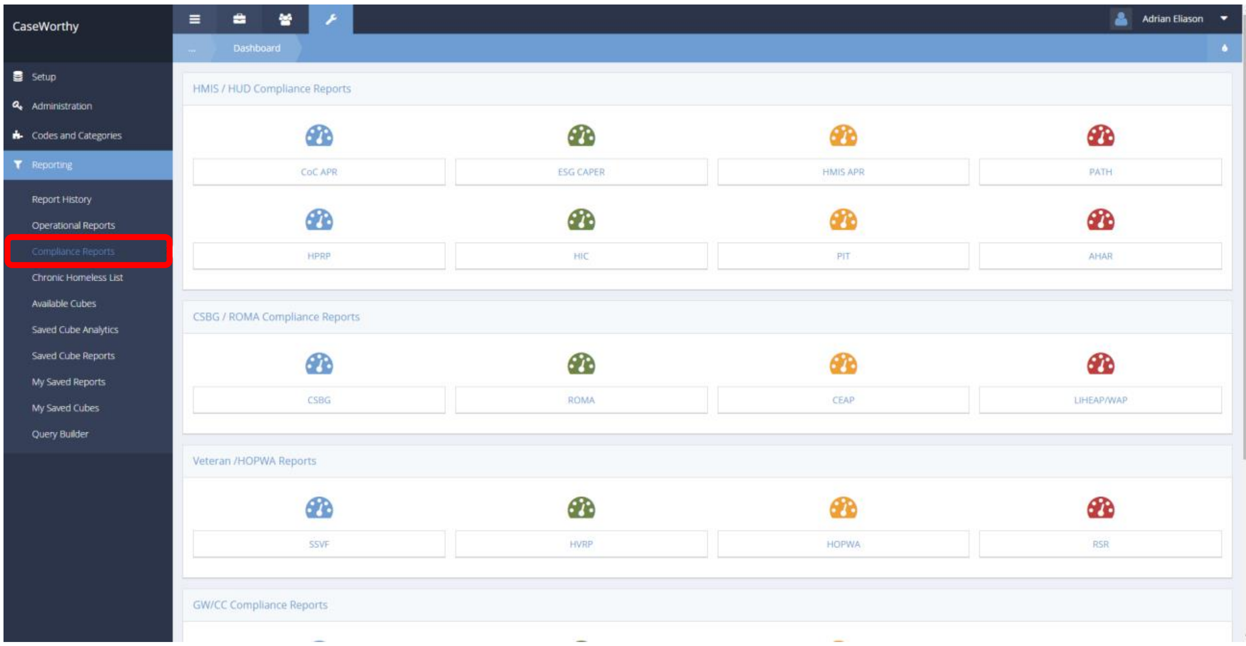


Launch like the traditional Services By Program report. A date range and myriad of parameters are required to be set. The "Unit Type(s)" parameter is new, select which units (days, hours, each, dollar, etc.) to include on the form. This form also contains a "Group By Like Units?" field. Check this box to have the items in the report grouped by units. Click the 

button to launch.

Compliance Reports

(Administration>Reporting>Compliance Reports)



Compliance reports are baseline reports that have been developed to fulfill certain funder requirements. When numerous customers using CaseWorthy™ have a shared funding source (typically a federal or national-level entity) that has specific compliance standards, CaseWorthy, Inc. creates the report and is responsible for maintaining it. Organizations frequently have lesser-used federal grants and/or local funding that also have specific reporting criteria (such as local United Way groups). In these cases, the Cubes Analysis tool may be used to generate the necessary documentation. If the Cubes do not meet the reporting needs, the organization receives training from CaseWorthy, Inc. to write their own custom reports.

Compliance Area Descriptions

HMIS/HUD Compliance Reports – this area contains the CoC APR, HMIS APR, PATH, HPRP, AHAR, HIC and PIT reports. These reports are required by HUD for various HMIS funded programs.

CSBG/ROMA Compliance Reports – this area focuses on programs funded through the Community Services Block Grant and other programs most typically implemented by Community Action Agencies. It includes the CSBG, ROMA, CEAP, and LIHEAP/WAP reports.

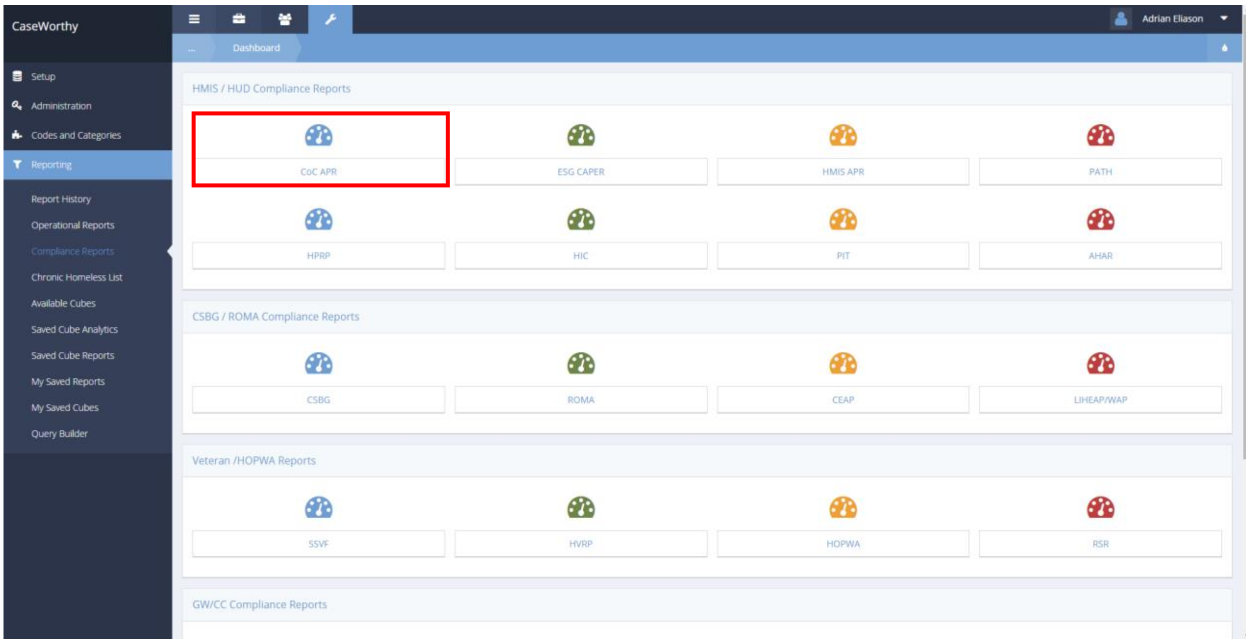
Veteran /HOPWA – It includes the SSVF, HVRP, HOPWA, and RSR reports.

GW/CC Compliance Reports – this area contains reports related to Goodwill and Catholic Charities organizations. It includes the SER, ASR and CC USA reports.

Data Quality and Monitoring – This section allows users to monitor and verify data and service quality before running compliance reports to help assure the best, most accurate and complete data are available when the compliance report is run and submitted. The Duplicate Client Check, Client Data Quality, Timeliness, and Clients by County reports are included in this area.

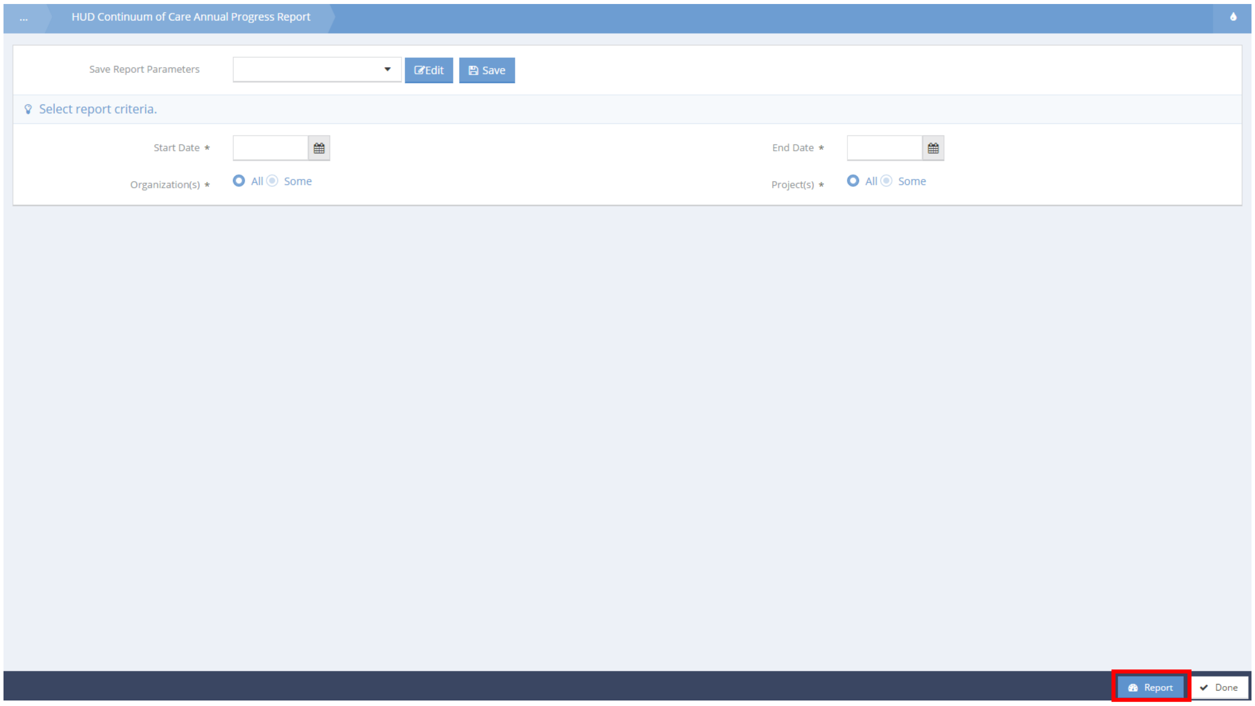
CoC APR

To run a CoC APR report, click on the CoC APR icon on the Compliance Reports dashboard.

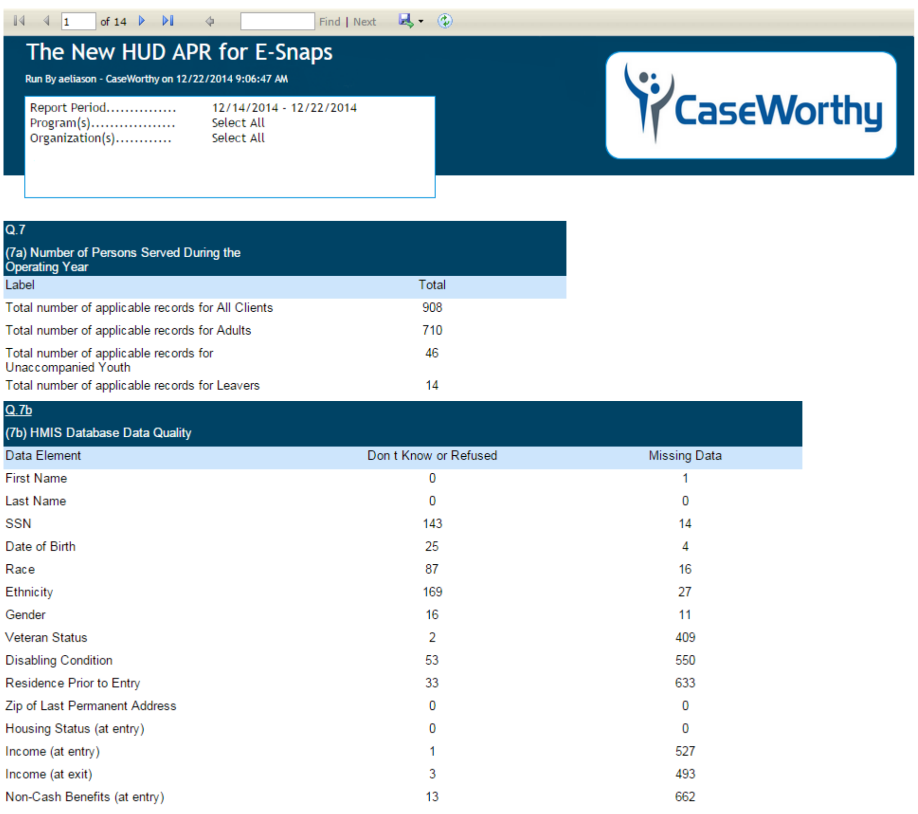


Enter a start and end date. Choose any organizations and projects. Click 

when finished.



The report displays in a new window.



1 of 14 Find | Next

The New HUD APR for E-Snaps

Run By aeliason - CaseWorthy on 12/22/2014 9:06:47 AM

Report Period............... 12/14/2014 - 12/22/2014
Program(s).................. Select All
Organization(s)............ Select All

CaseWorthy

Q.7

(7a) Number of Persons Served During the Operating Year

Label	Total
Total number of applicable records for All Clients	908
Total number of applicable records for Adults	710
Total number of applicable records for Unaccompanied Youth	46
Total number of applicable records for Leavers	14

Q.7b

(7b) HMIS Database Data Quality

Data Element	Don t Know or Refused	Missing Data
First Name	0	1
Last Name	0	0
SSN	143	14
Date of Birth	25	4
Race	87	16
Ethnicity	169	27
Gender	16	11
Veteran Status	2	409
Disabling Condition	53	550
Residence Prior to Entry	33	633
Zip of Last Permanent Address	0	0
Housing Status (at entry)	0	0
Income (at entry)	1	527
Income (at exit)	3	493
Non-Cash Benefits (at entry)	13	662

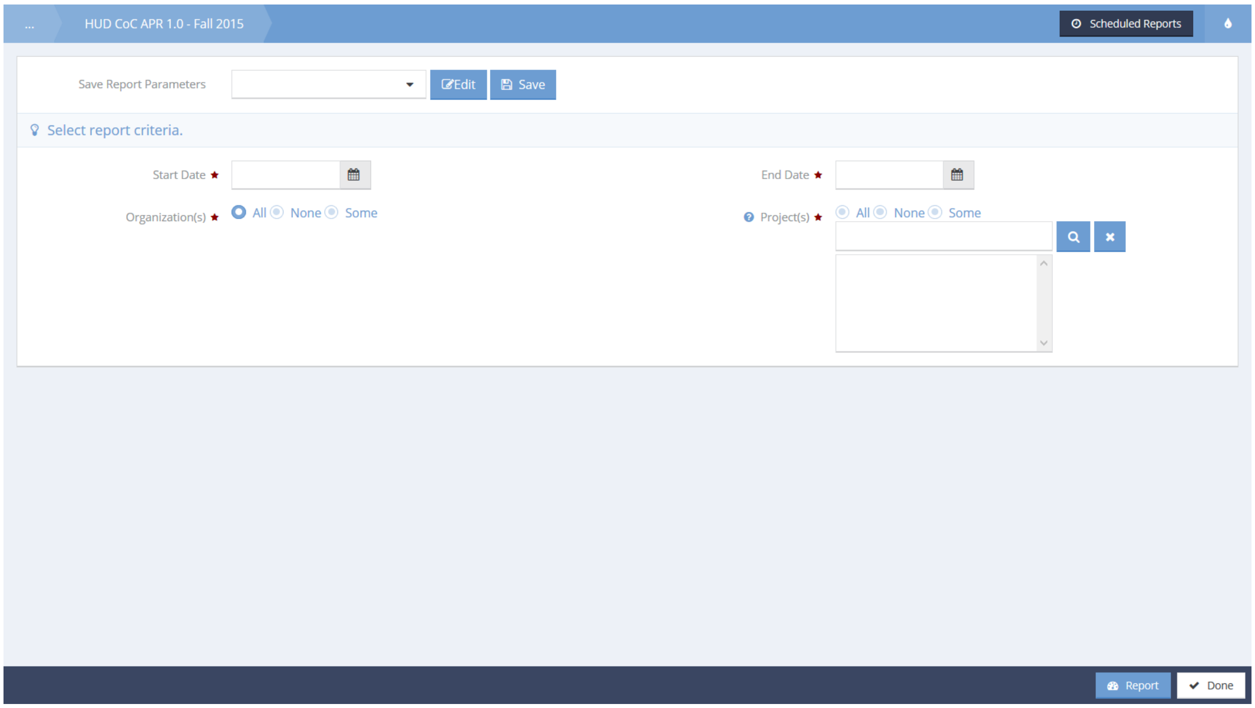
New HUD APR for E-Snaps Page 1 of 14

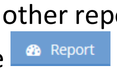
CoC APR 1.0

Objective: Launch the 2015 CoC APR 1.0 report.

Navigation: Administration>Reporting>Compliance Reports>CoC APR 1.0 (Fall 2015)

The HUD CoC APR 1.0 – Fall 2015 form displays.



Launch like any other report. Enter a date range and select organizations and projects to include in the report. Click the 

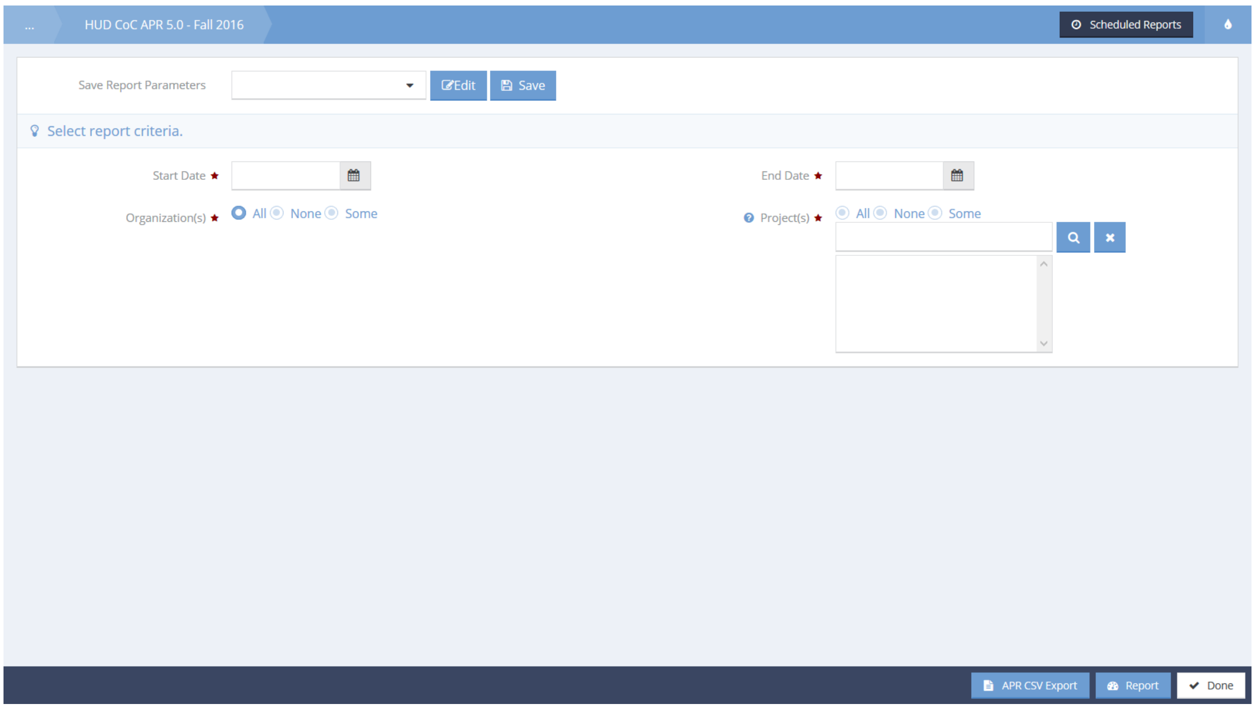
button to launch.

CoC APR 5.0

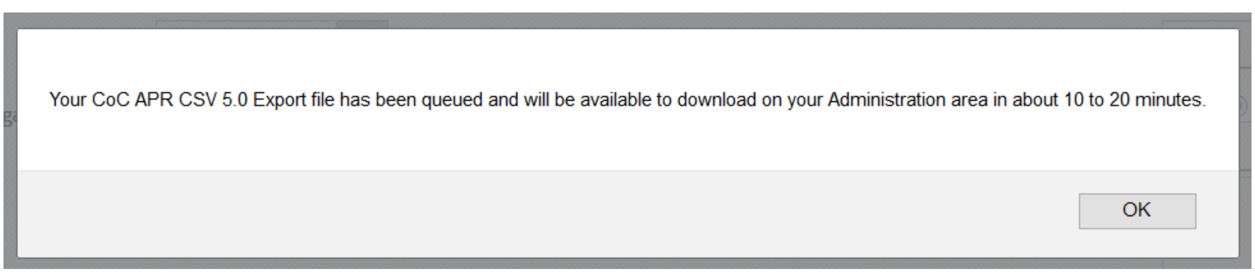
Objective: Launch the 2016 CoC APR 5.0 report.

Navigation: Administration>Reporting>Compliance Reports>CoC APR 5.0 (Fall 2016)

The HUD CoC APR 5.0 – Fall 2016 form displays.

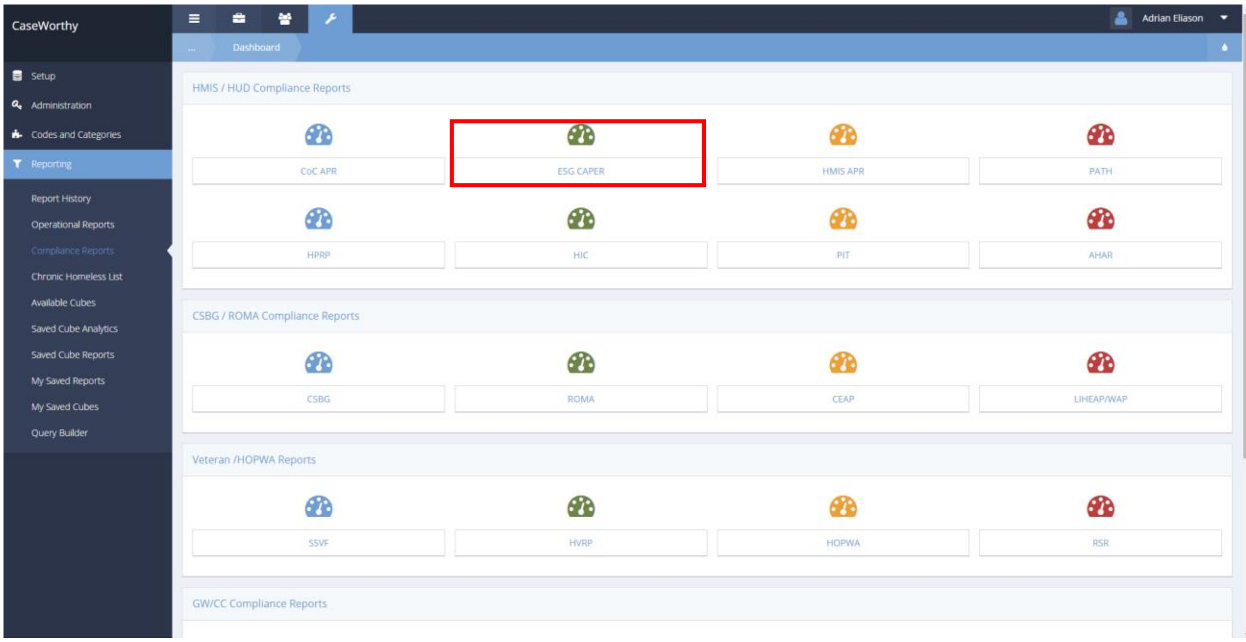


Launch like any other report. Enter a date range and select organizations and projects to include in the report. Click the Report button to launch. A CSV export is available on this form, click the APR CSV Export button, a dialogue box appears indicating when the export should be ready to download.

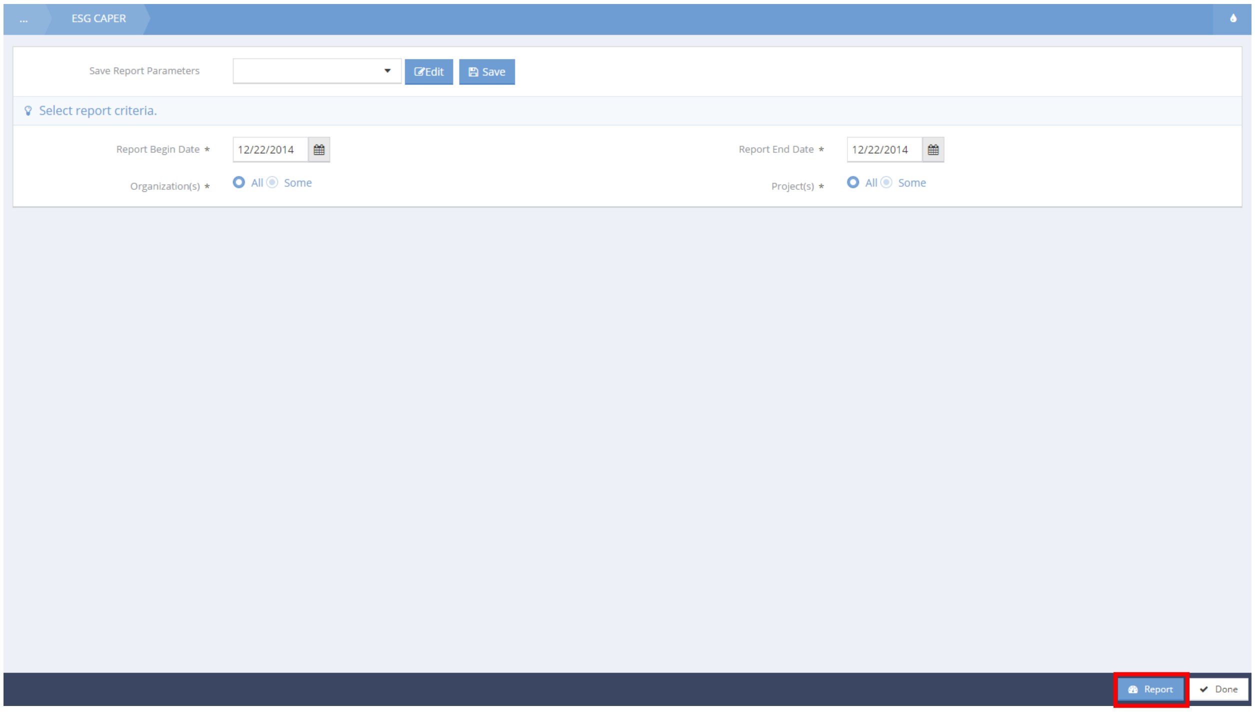


ESG CAPER

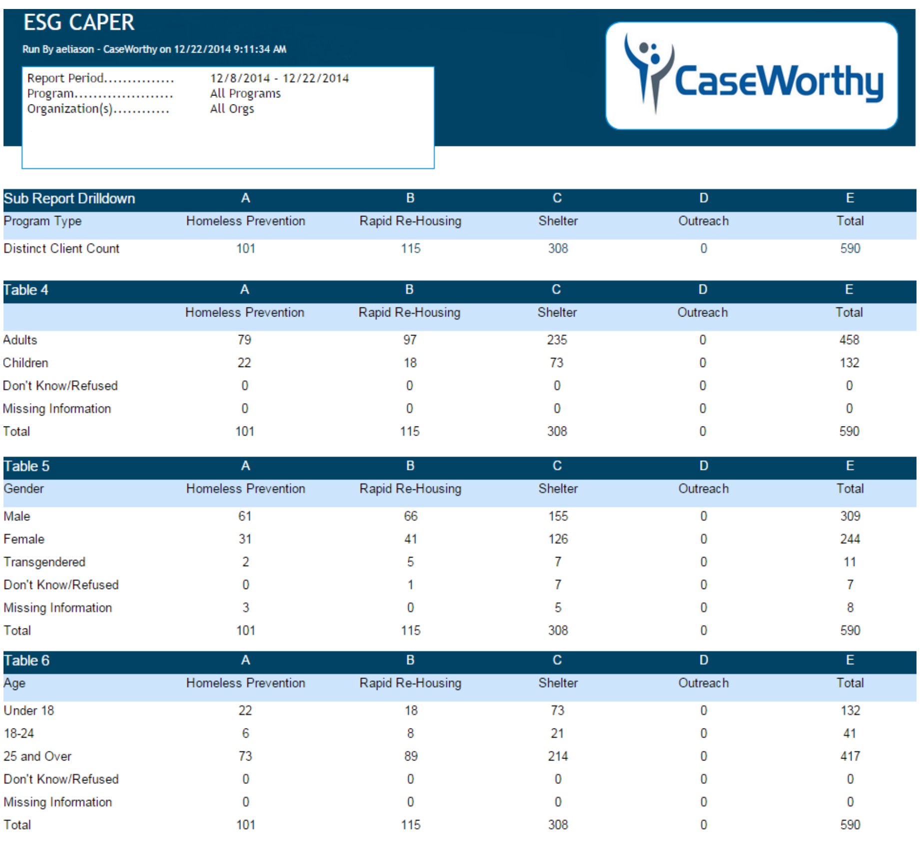
To run an ESG CAPER report, click on the ESG CAPER icon on the Compliance Reports dashboard.



Enter a report begin and end date. Choose any organizations and projects. Click Report when finished.



The report displays in a new window.



ESG CAPER

Run By aeliason - CaseWorthy on 12/22/2014 9:11:34 AM

Report Period............... 12/8/2014 - 12/22/2014
Program..................... All Programs
Organization(s)............ All Orgs

Sub Report Drilldown	A	B	C	D	E
Program Type	Homeless Prevention	Rapid Re-Housing	Shelter	Outreach	Total
Distinct Client Count	101	115	308	0	590

Table 4	A	B	C	D	E
	Homeless Prevention	Rapid Re-Housing	Shelter	Outreach	Total
Adults	79	97	235	0	458
Children	22	18	73	0	132
Don't Know/Refused	0	0	0	0	0
Missing Information	0	0	0	0	0
Total	101	115	308	0	590

Table 5	A	B	C	D	E
Gender	Homeless Prevention	Rapid Re-Housing	Shelter	Outreach	Total
Male	61	66	155	0	309
Female	31	41	126	0	244
Transgendered	2	5	7	0	11
Don't Know/Refused	0	1	7	0	7
Missing Information	3	0	5	0	8
Total	101	115	308	0	590

Table 6	A	B	C	D	E
Age	Homeless Prevention	Rapid Re-Housing	Shelter	Outreach	Total
Under 18	22	18	73	0	132
18-24	6	8	21	0	41
25 and Over	73	89	214	0	417
Don't Know/Refused	0	0	0	0	0
Missing Information	0	0	0	0	0
Total	101	115	308	0	590

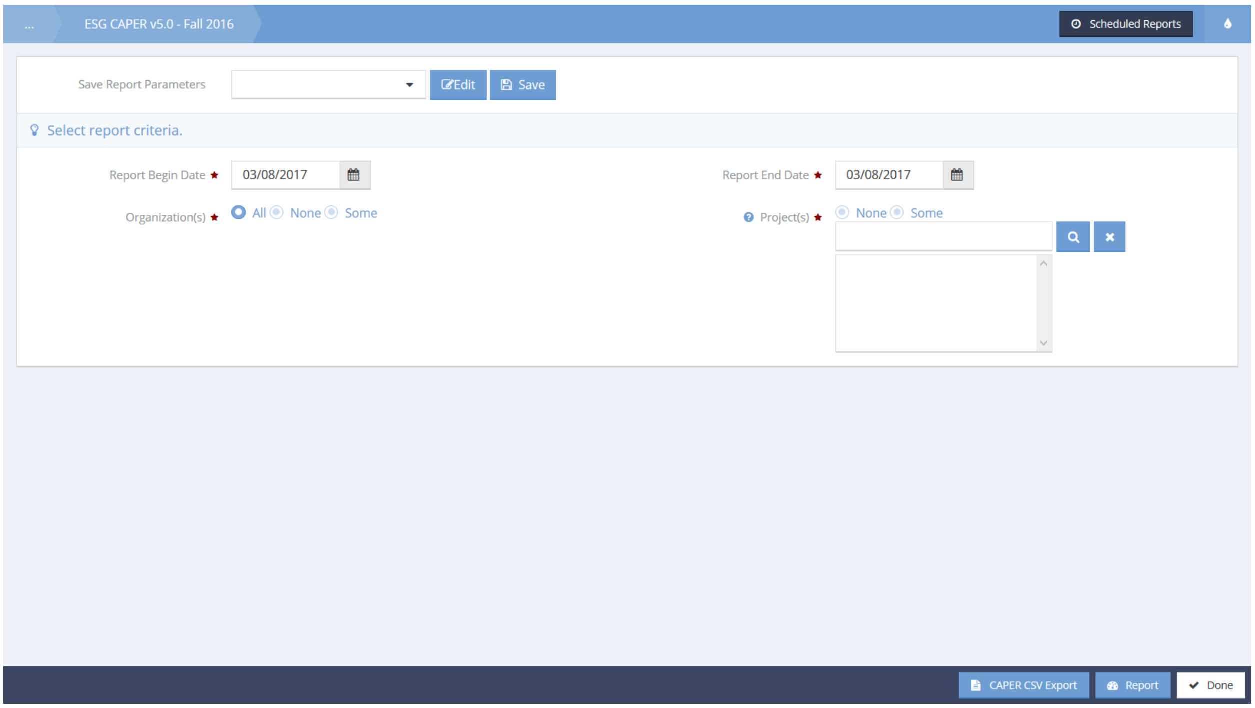
ESG CAPER Page 1 of 2

ESG CAPER 5.0

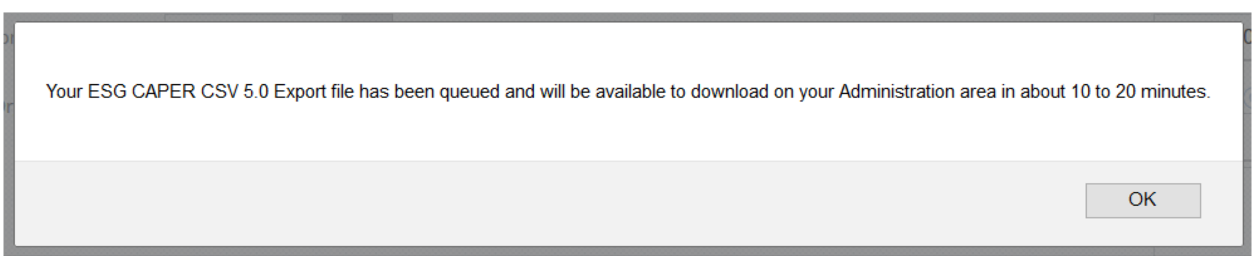
Objective: Launch the 2016 ESG CAPER 5.0 report.

Navigation: Administration>Reporting>Compliance Reports>ESG CAPER 5.0 (Fall 2016)

The ESG CAPER v5.0 – Fall 2016 form displays.

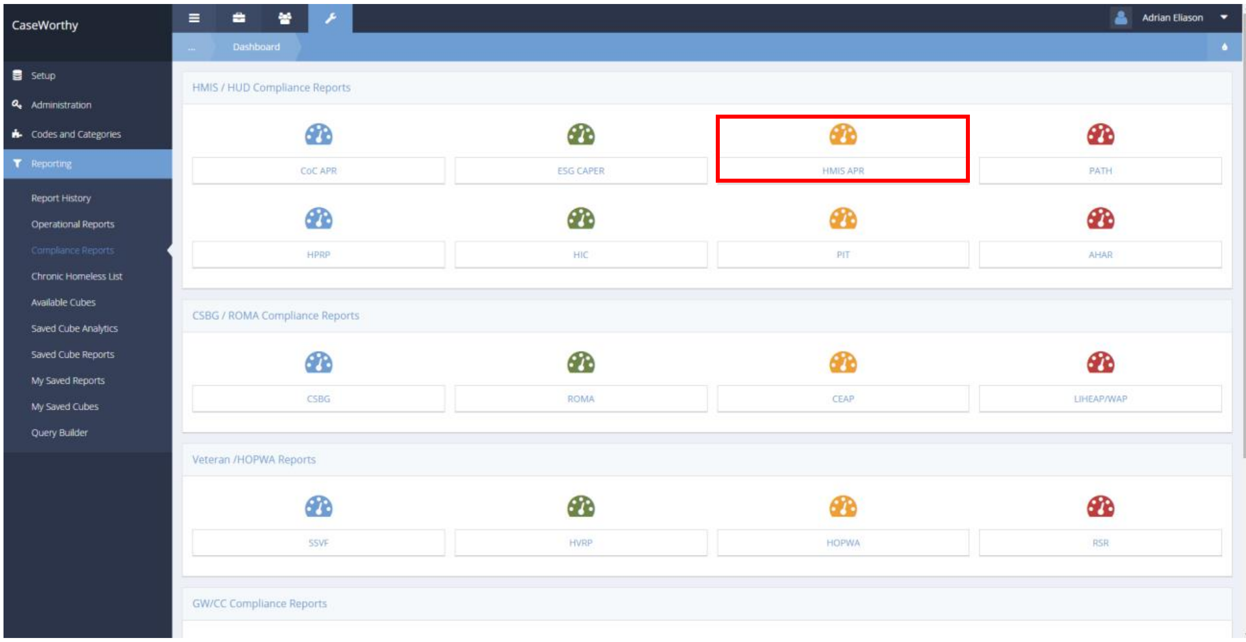


Launch like any other report. Enter a date range and select organizations and projects to include in the report. Click the Report button to launch. A CSV export is available on this form. Click the CAPER CSV Export button, a dialogue box appears indicating when the export should be ready to download.



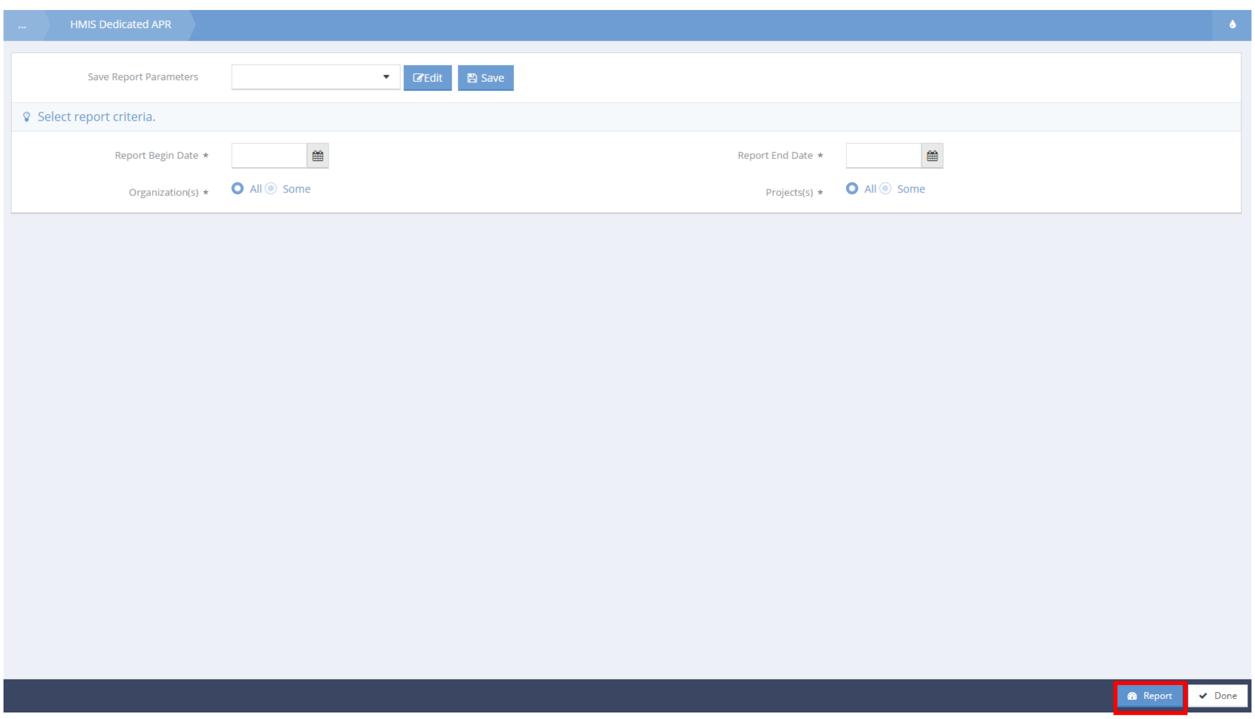
HMIS APR

To run an HMIS Dedicated APR report, click the HMIS APR icon.



Enter a report begin and end date. Choose any organizations and projects. Click 

when finished.



The report displays in a new window.

APR for HMIS Dedicated Projects

Run By aeliason - CaseWorthy on 12/22/2014 9:38:33 AM

Report Period...............	12/8/2014 - 12/22/2014
Program.....................	All Programs
Organization(s)............	All Orgs

CaseWorthy

Aggregate HMIS Participation for Programs and Providers	
Total Unduplicated number of Programs in CoC	26
Total Unduplicated number of Providers in CoC	8

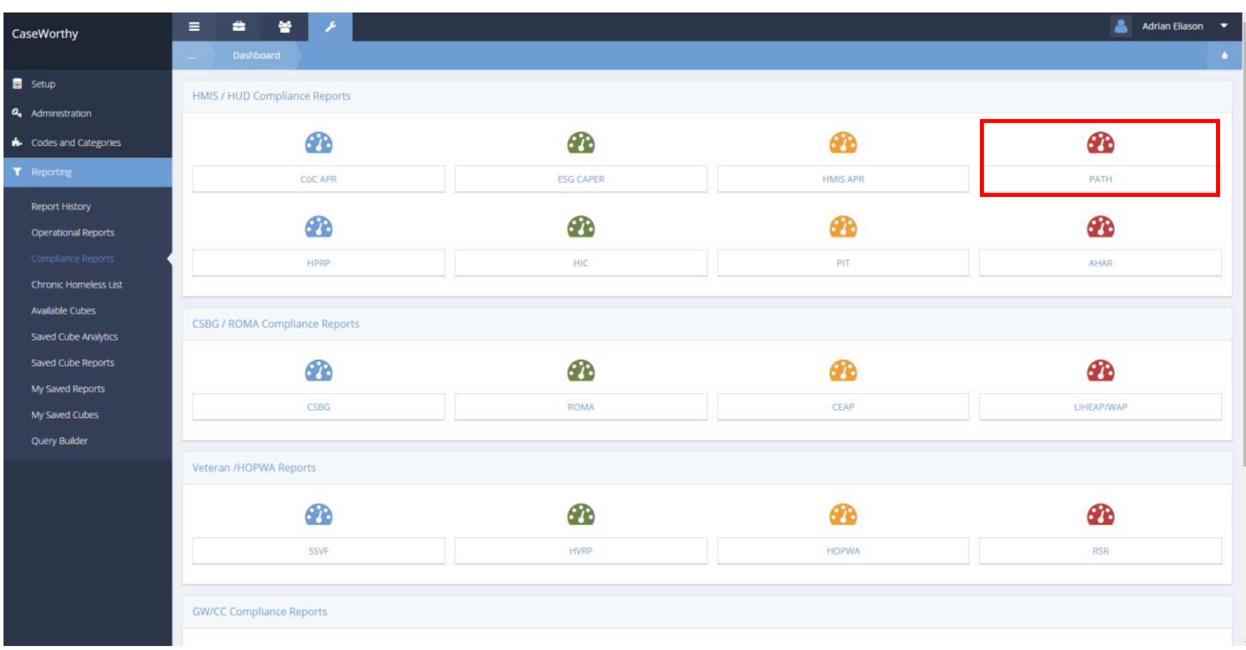
H 2 - HMIS Implementation and Staffing		
Scope of HMIS Implementation	CoC	Entire Implementation
(a) Total Homeless System Programs in HMIS	12	12
(b) How many programs participate in HMIS through data integration	0	0
(c) Total unduplicated homeless system clients in HMIS	584	584
(d) Total new unduplicated homeless system clients in HMIS in operating year	4	4
(e) Total number of Users	253	253
(f) Total number of Active Users (logged into system in the last 30 days)	31	31

H 3 - HMIS Participation by Program Type		
Type of CoC Programs	Number of CoC Programs	Participating in HMIS
Emergency Shelter	5	3
Transitional Housing	2	1
Permanent Supportive Housing	1	0
Homeless Street Outreach	5	2
HPRP	0	0
Services Only	3	1
Other	1	0
Safe haven	1	1
Permanent Housing	0	0
Total	26	12

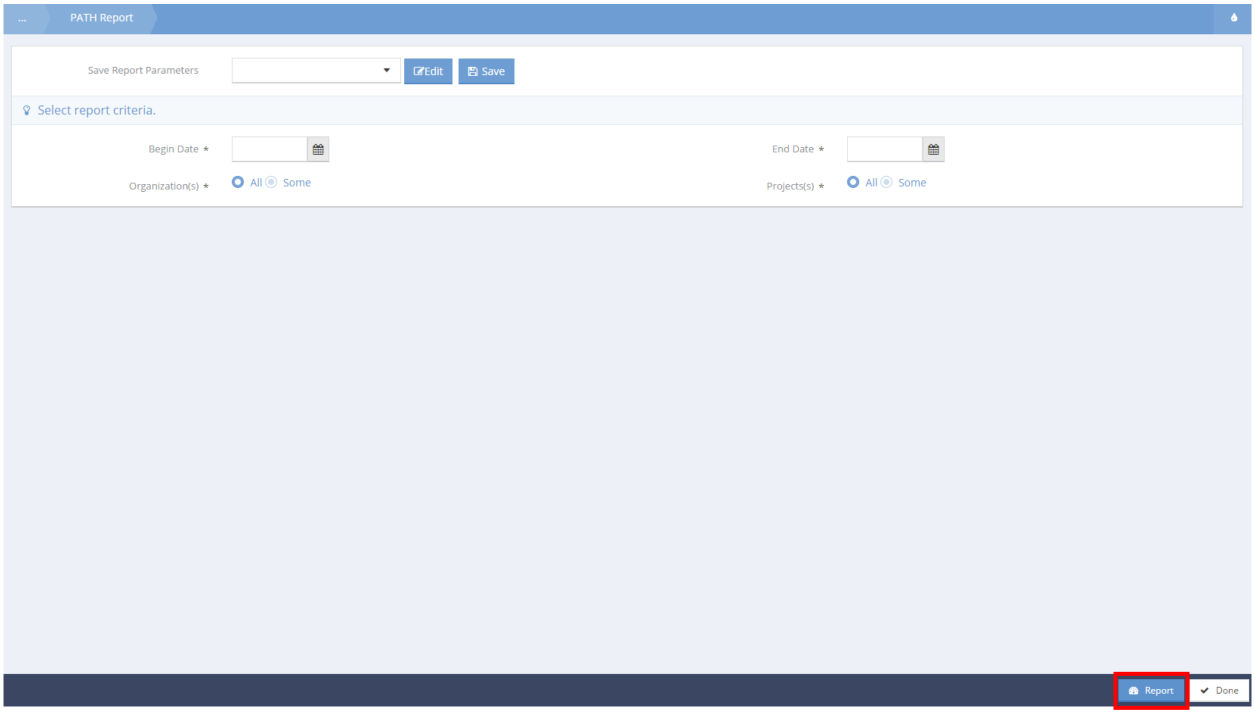
H 11c - Program Descriptor Data Elements	Missing	
Data Element	Count	Percent (%)
Program Name	0	0
Site Configuration Type	0	0
Site Address	3	37.5
Geocode	6	75

PATH

To run a new PATH report, click the Path icon.



Enter a begin and end date. Choose any organizations and projects. Click Report when finished.



The report displays in a new window.

PATH

Run By aeliason - CaseWorthy on 12/22/2014 9:41:57 AM

Report Period.............. 12/9/2014 - 12/22/2014
Program..................... All Programs
Organization(s)............ All Orgs

CaseWorthy

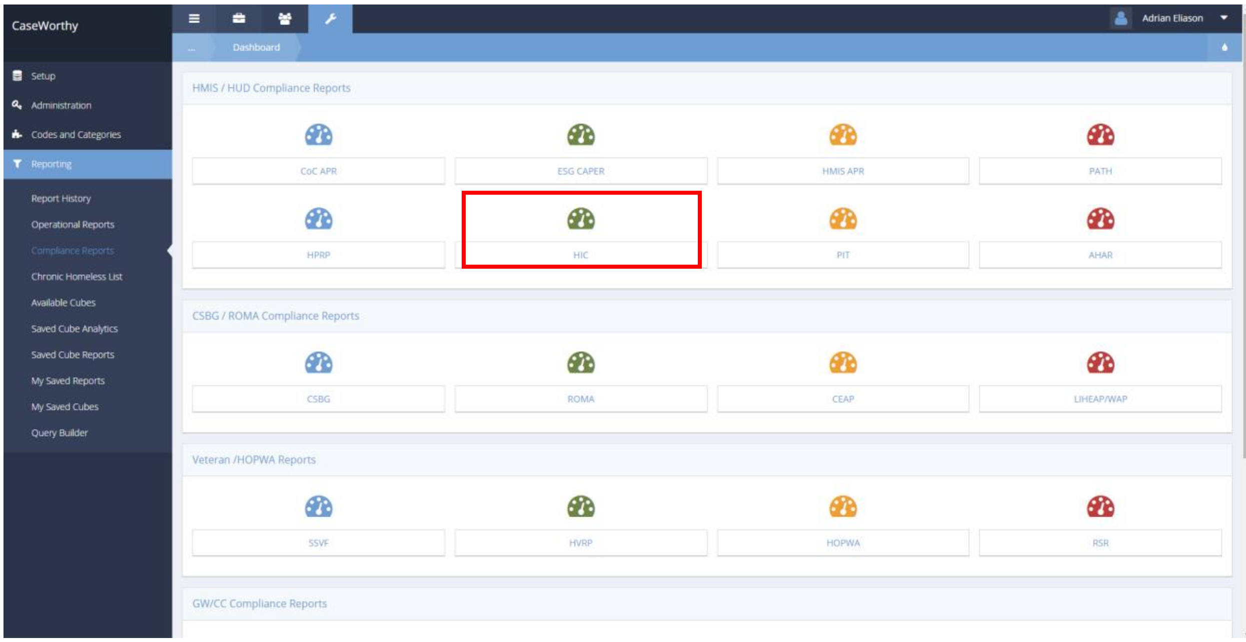
B		
Sub Item	**Voluntary Outcome Measure 4: Housing**	**Answer**
B1	Persons who are homeless and have serious mental illnesses served by PATH funds and other sources	0
B2a	Persons served by PATH federal and match funds - Outreach	0
B2b	Outreach contacts who became enrolled in PATH during the current reporting period	0
B2c	Outreach contacts who did not enroll in PATH	0
B2d	Number of outreach contacts (in B2c) not enrolled because they were ineligible	0
B3	Persons served by PATH (Persons enrolled in PATH including those enrolled prior to report begin date)	0
B4	Total number of persons receiving any PATH-supported services (B2c + B3)	0

C		
Sub Item	**Type of Service**	**Answer**
C	Unduplicated count of individuals receiving services by Service Report Mapping type	0
C.a	Outreach	0
C.b	Screening and diagnostic treatment	0
C.c	Habilitation and rehabilitation	0
C.d	Community mental health	0
C.e	Alcohol or drug treament	0
C.f	Staff training	0
C.g	Case management	0
C.h	Supportive and supervisory services in residential settings	0
C.i	Referrals for primary health services, job training, educational services, and relevant housing services	0
C.j1	Minor renovation, expansion, and repair of housing	0
C.j2	Planning of housing	0
C.j3	Matching eligible homeless individuals with appropriate housing situations	0
C.j4	Technical assistance in applying for housing assistance	0
C.j5	Improving the coordination of housing services	0
C.j6	Security deposits	0
C.j7	One-time rental payments to prevent eviction	0

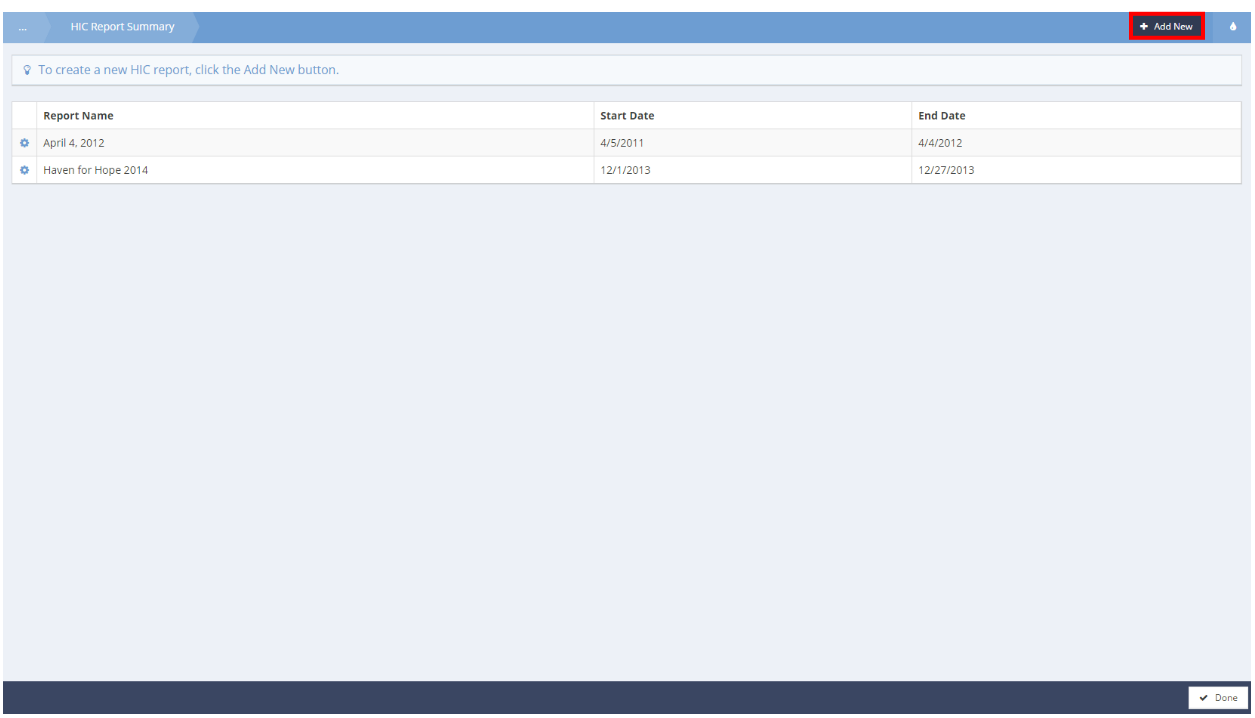
PATH Report Page 1 of 4

HIC

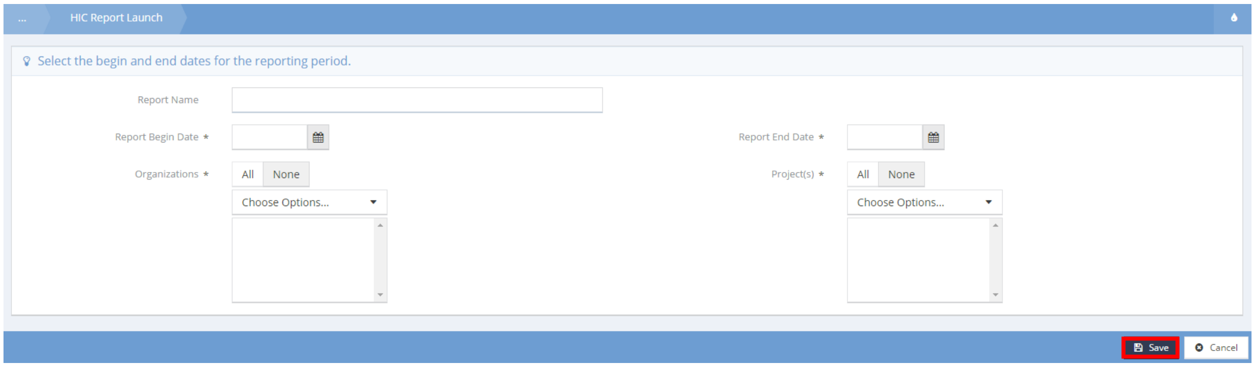
To run an HIC report, click the HIC icon.



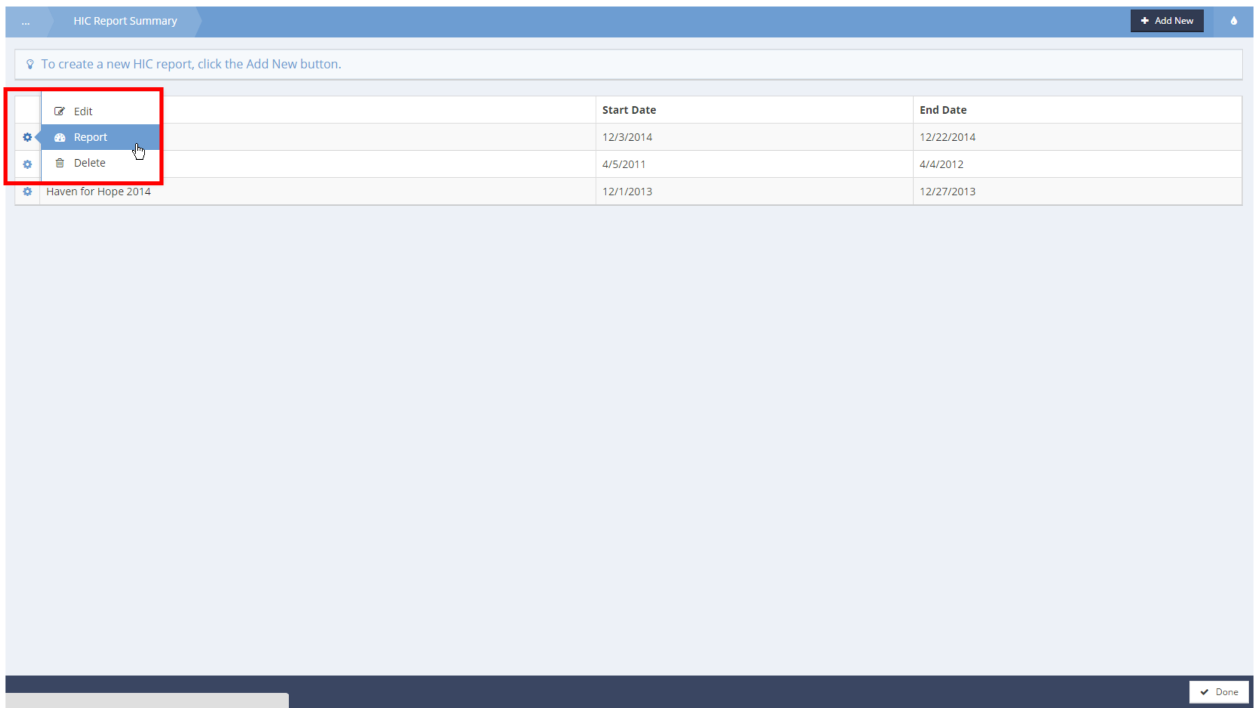
To create a new HIC report, click the **+ Add New** button.



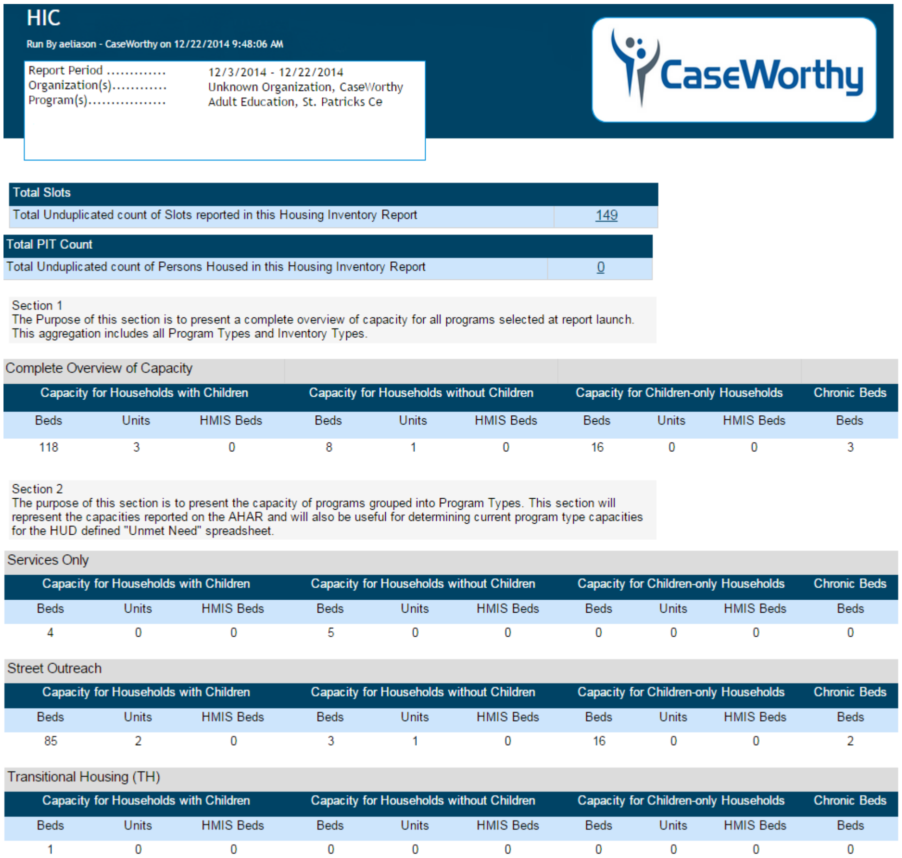
Enter a report begin and end date. Choose any organizations and projects. Click **Save** when done. The report now appears in the HIC Report Summary.



To view an HIC report, click the action gear next to a report and click Report.



The report displays in a new window.



HIC

Run By aeliason - CaseWorthy on 12/22/2014 9:48:06 AM

Report Period .... 12/3/2014 - 12/22/2014
Organization(s)........... Unknown Organization, CaseWorthy
Program(s)................ Adult Education, St. Patricks Ce

Total Slots	
Total Unduplicated count of Slots reported in this Housing Inventory Report	149

Total PIT Count	
Total Unduplicated count of Persons Housed in this Housing Inventory Report	0

Section 1
The Purpose of this section is to present a complete overview of capacity for all programs selected at report launch. This aggregation includes all Program Types and Inventory Types.

Complete Overview of Capacity

Capacity for Households with Children			Capacity for Households without Children			Capacity for Children-only Households			Chronic Beds
Beds	Units	HMIS Beds	Beds	Units	HMIS Beds	Beds	Units	HMIS Beds	Beds
118	3	0	8	1	0	16	0	0	3

Section 2
The purpose of this section is to present the capacity of programs grouped into Program Types. This section will represent the capacities reported on the AHAR and will also be useful for determining current program type capacities for the HUD defined "Unmet Need" spreadsheet.

Services Only

Capacity for Households with Children			Capacity for Households without Children			Capacity for Children-only Households			Chronic Beds
Beds	Units	HMIS Beds	Beds	Units	HMIS Beds	Beds	Units	HMIS Beds	Beds
4	0	0	5	0	0	0	0	0	0

Street Outreach

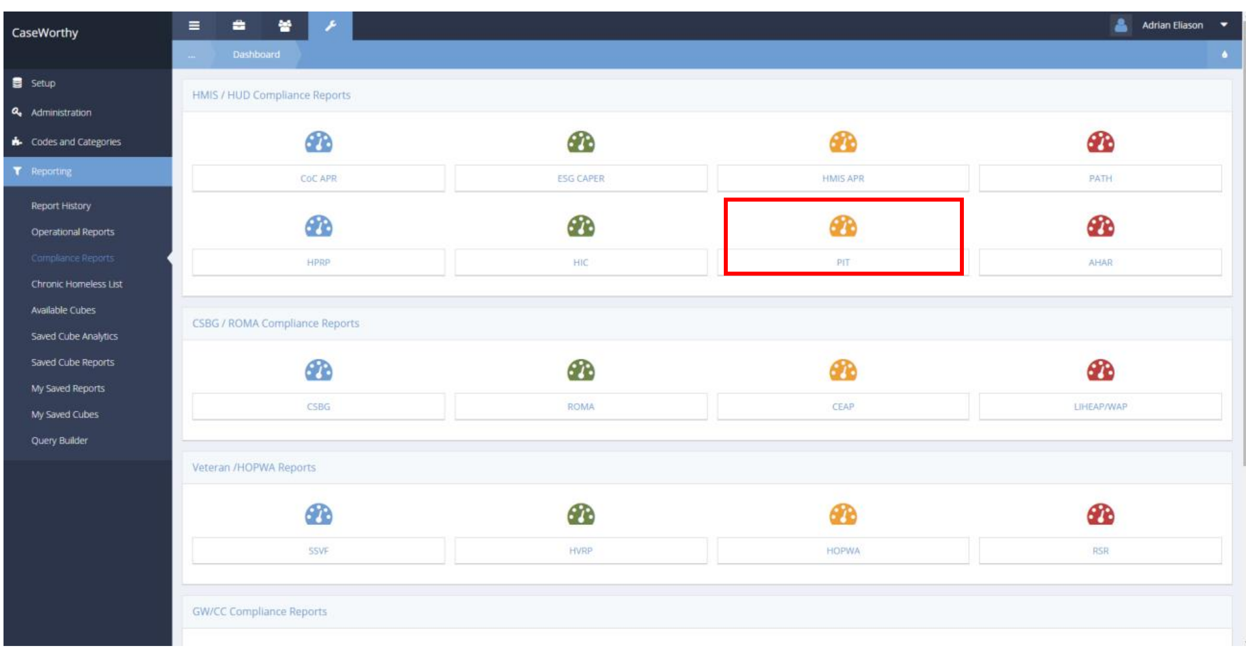
Capacity for Households with Children			Capacity for Households without Children			Capacity for Children-only Households			Chronic Beds
Beds	Units	HMIS Beds	Beds	Units	HMIS Beds	Beds	Units	HMIS Beds	Beds
85	2	0	3	1	0	16	0	0	2

Transitional Housing (TH)

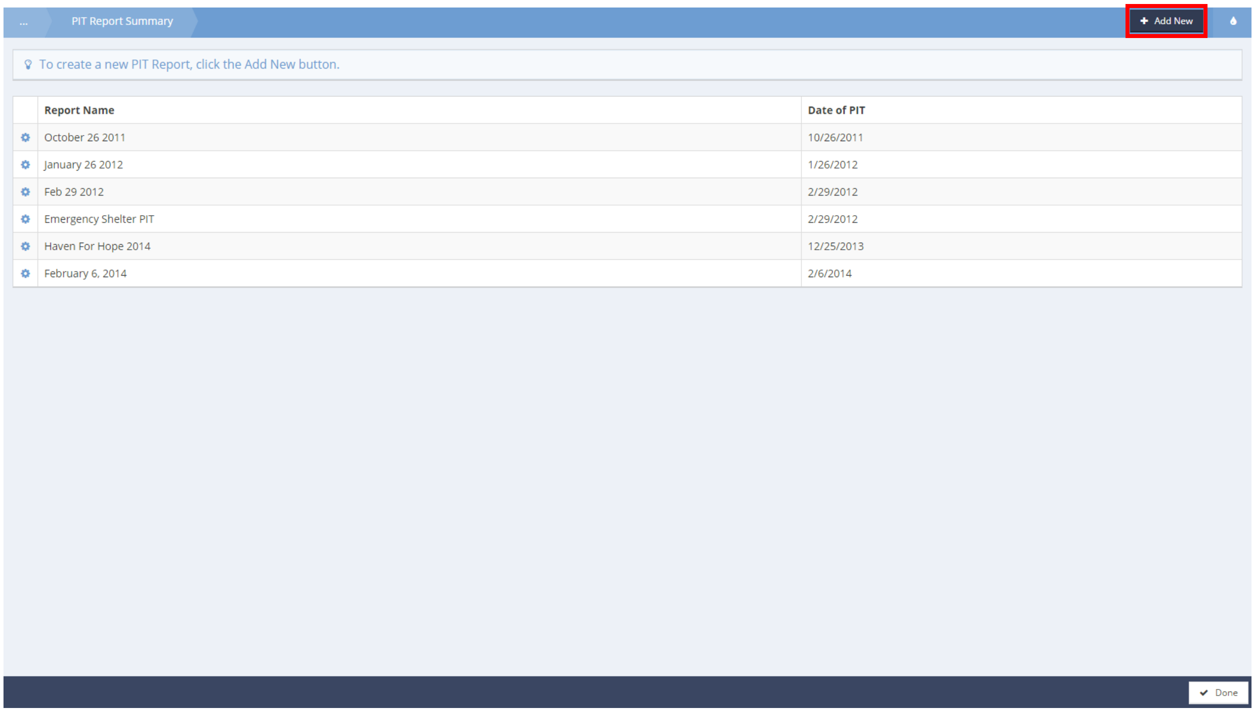
Capacity for Households with Children			Capacity for Households without Children			Capacity for Children-only Households			Chronic Beds
Beds	Units	HMIS Beds	Beds	Units	HMIS Beds	Beds	Units	HMIS Beds	Beds
1	0	0	0	0	0	0	0	0	0

PIT

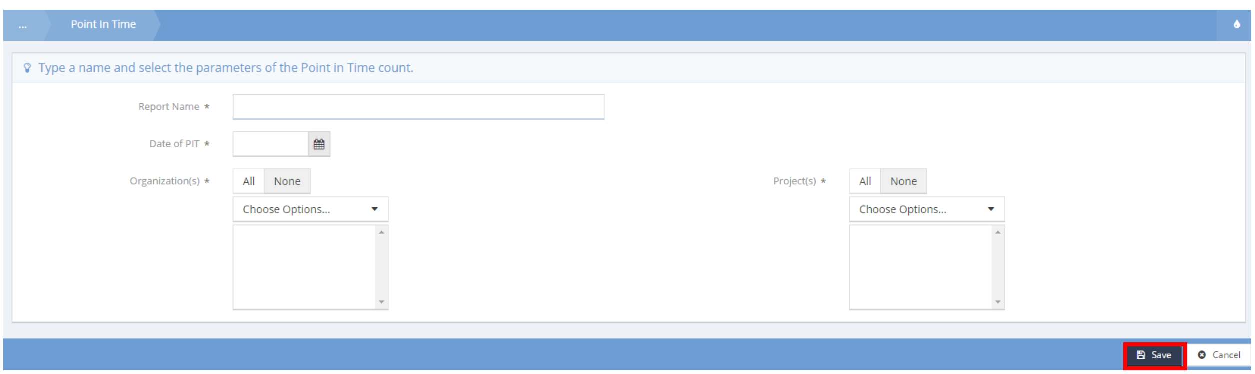
To run a PIT report, click the PIT icon.



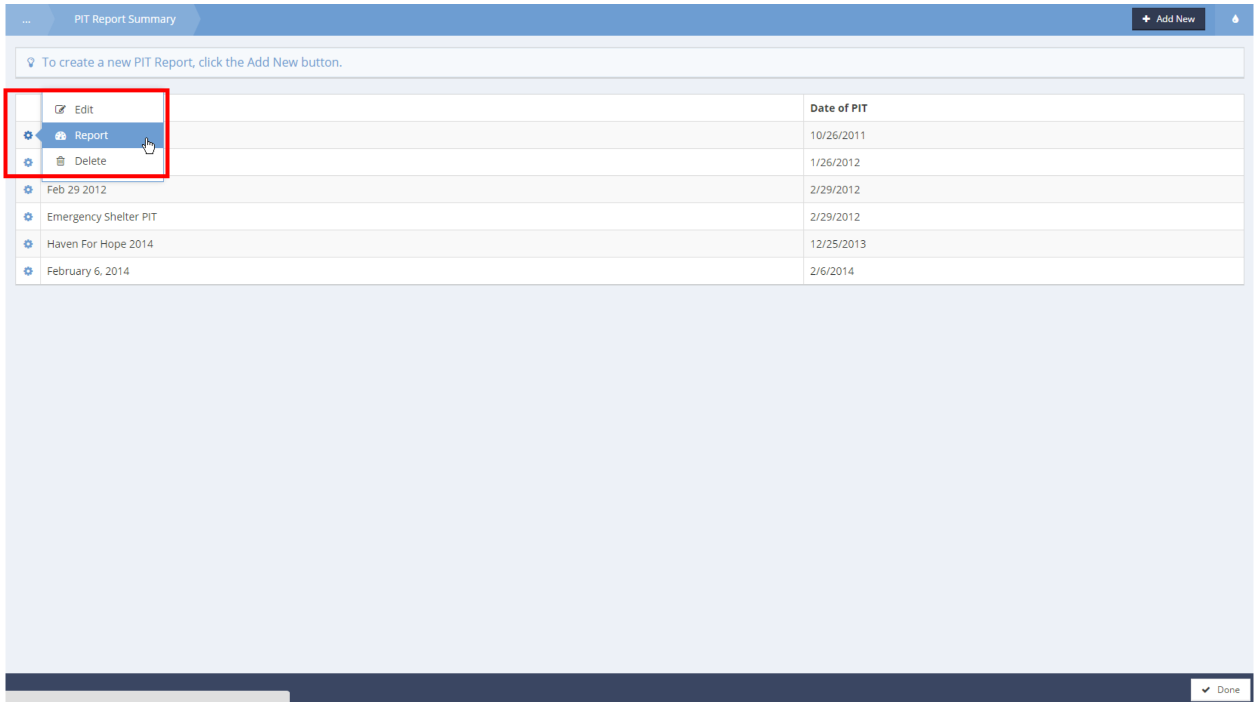
To create a new PIT report, click the + Add New button.



Enter a report name and date. Choose any organizations and providers. Click Save when done. The report now appears in the PIT Report Summary.



To view a report, click the action gear next to a report and click Report.



The report displays in a new window.

PIT

Run By aeliason - CaseWorthy on 12/22/2014 9:55:39 AM

PIT Date 2/29/2012
Organization(s)............ Unknown Organization, CaseWorthy
Program(s)................. Adult Education, 12 Permanent Ho

CaseWorthy

Use the following hyperlinks to access the Excel-ready Sub Report

Emergency Shelter | Transitional Housing | Safe Haven | Total

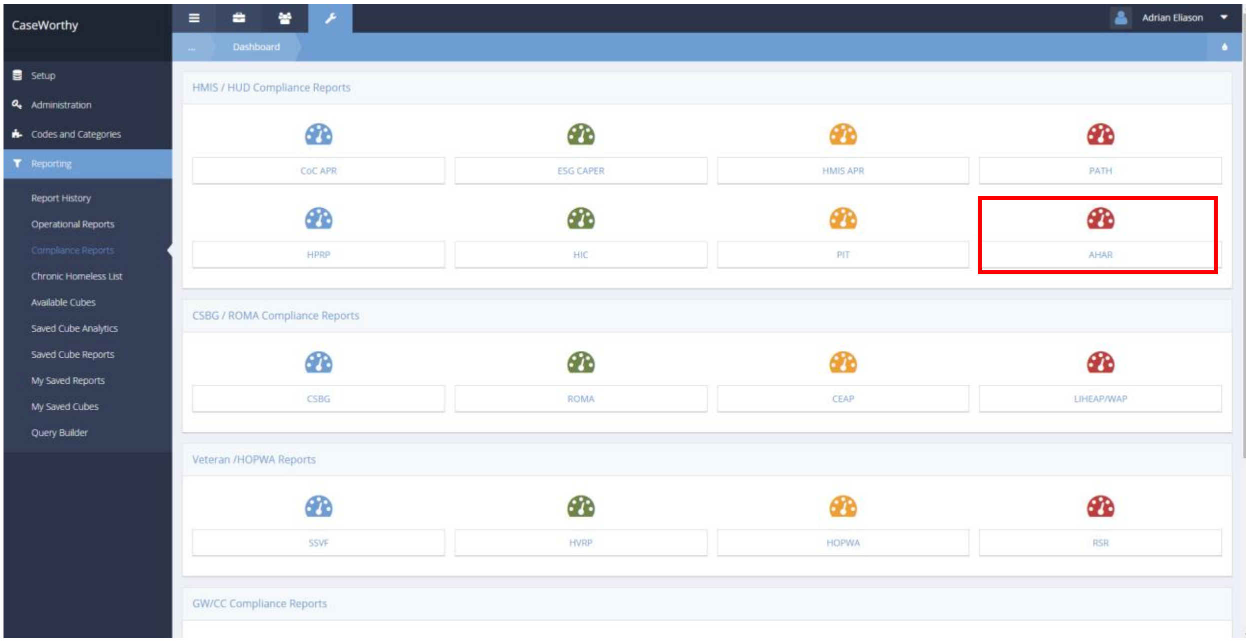
Total Households and Persons	ES	TH	SH	Sheltered Total	Unsheltered
Number of Households	0	0	0	5	
Number of Persons	0	0	0	5	

Households with at least one Adult and one Child	ES	TH	SH	Sheltered Total	Unsheltered
Number of Households	0	0	0	0	
Number of Persons	0	0	0	0	
Number of Persons Under Age 18	0	0	0	0	
Number of Persons Ages 18 - 24	0	0	0	0	
Number of Persons Over Age 24	0	0	0	0	
Gender (Adults and Children)					
Female	0	0	0	0	
Male	0	0	0	0	
Transgender	0	0	0	0	
Ethnicity (Adults and Children)					
Non-Hispanic/Non-Latino	0	0	0	0	
Hispanic/Latino	0	0	0	0	
Race (Adults and Children)					
White	0	0	0	0	
Black or African-American	0	0	0	0	
Asian	0	0	0	0	
American Indian or Alaska Native	0	0	0	0	
Native Hawaiian or Other Pacific Islander	0	0	0	0	
Multiple Races	0	0	0	0	

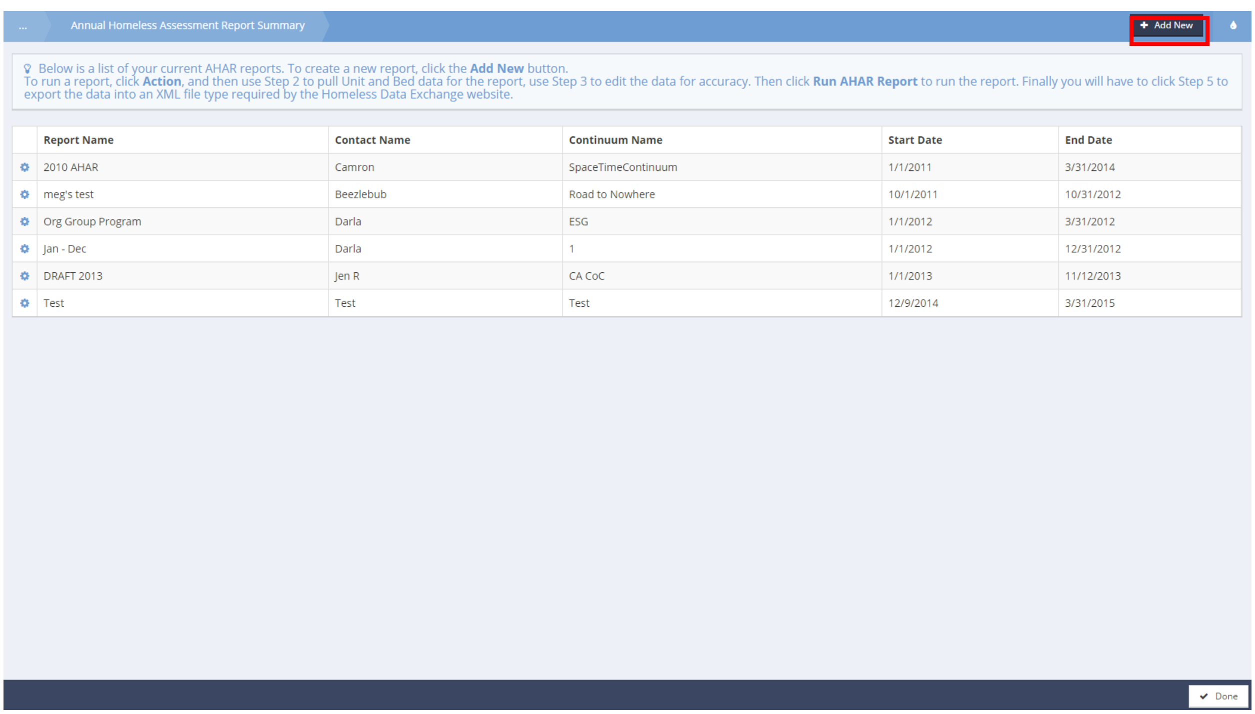
PIT Report Page 1 of 4

AHAR

To run an AHAR report, click the AHAR icon.

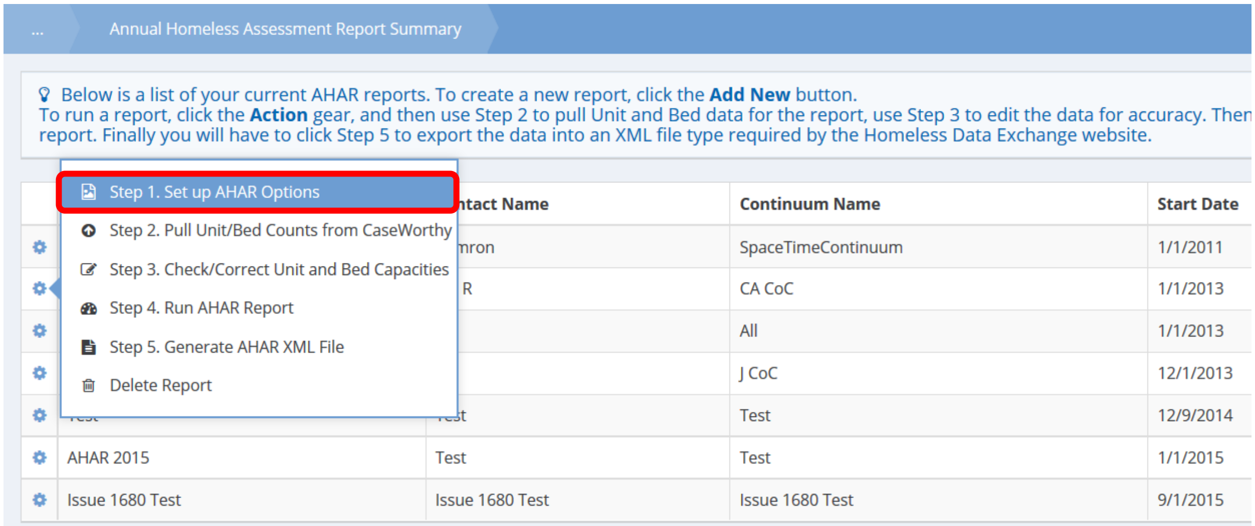


To create a new AHAR report click the **+ Add New** button.

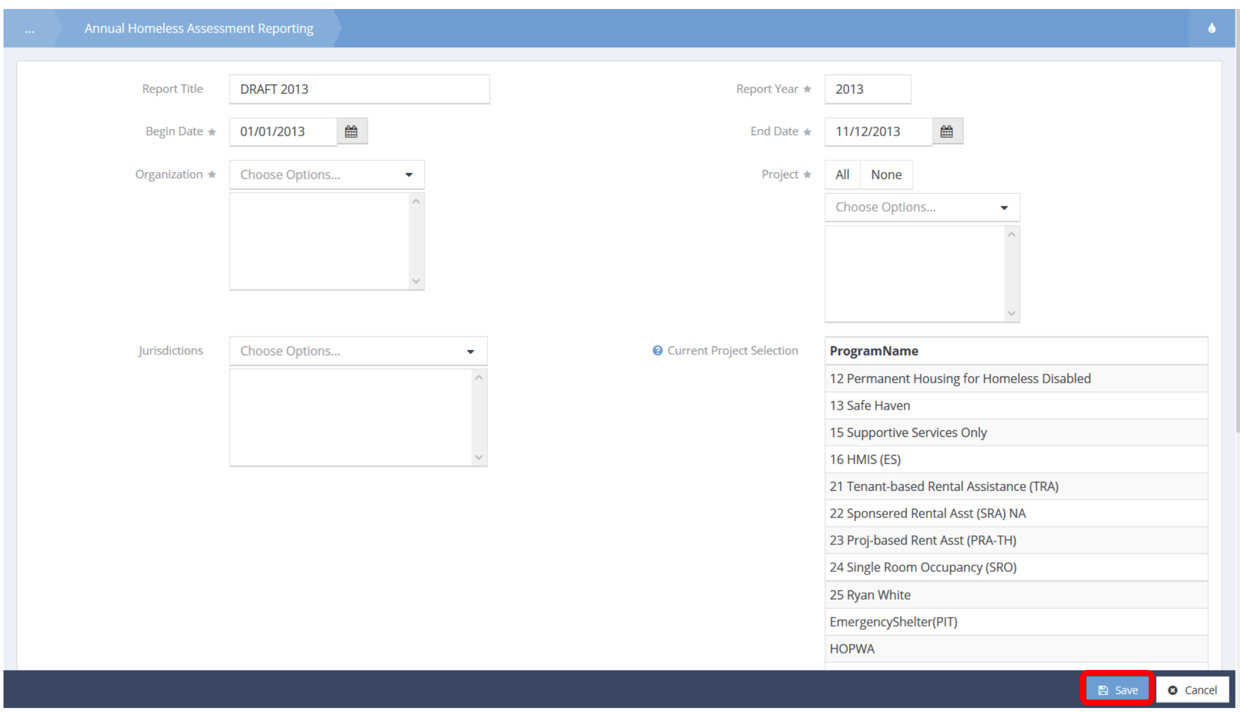


Enter a year, begin date, end date, continuum name, and contact name. Choose any organizations, projects, and jurisdictions. Click the checkbox for Run as Veterans AHAR to exclude questions regarding children and other non-applicable data. Click **Save** when done.

Alternatively, click an action gear icon associated with the desired report and select Step 1. Set up AHAR Options from the menu options.

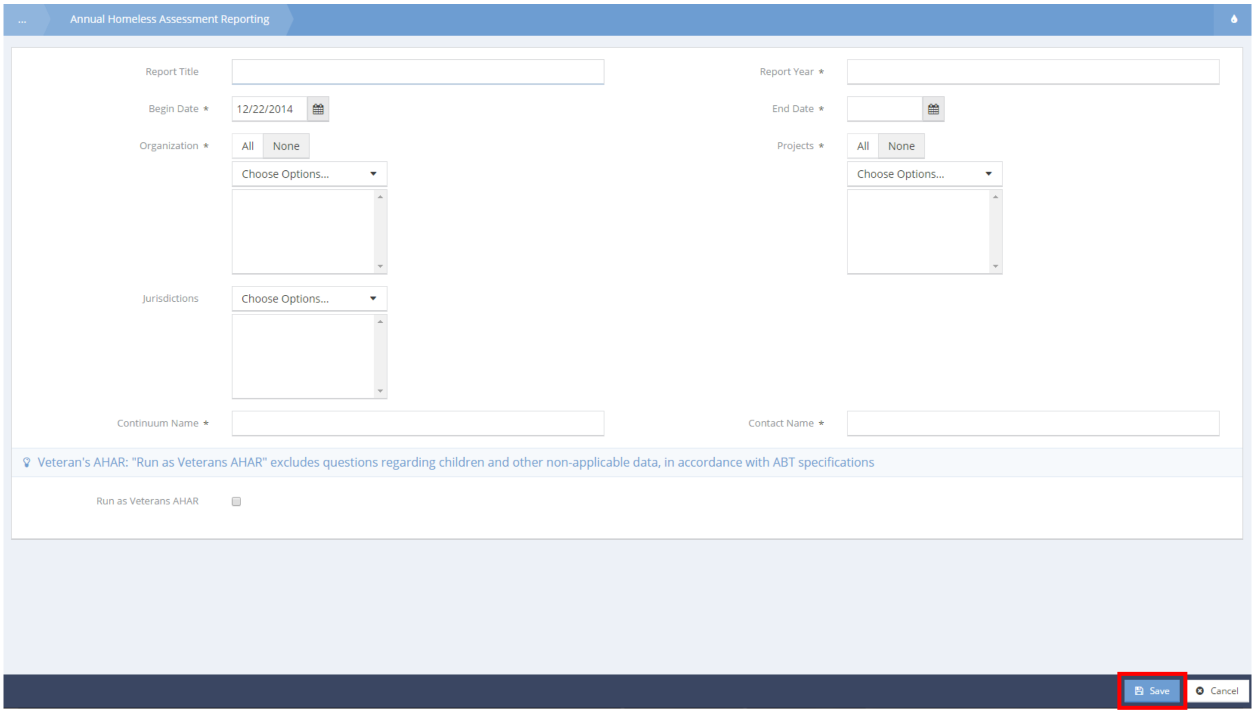


The Annual Homeless Assessment Reporting form displays.

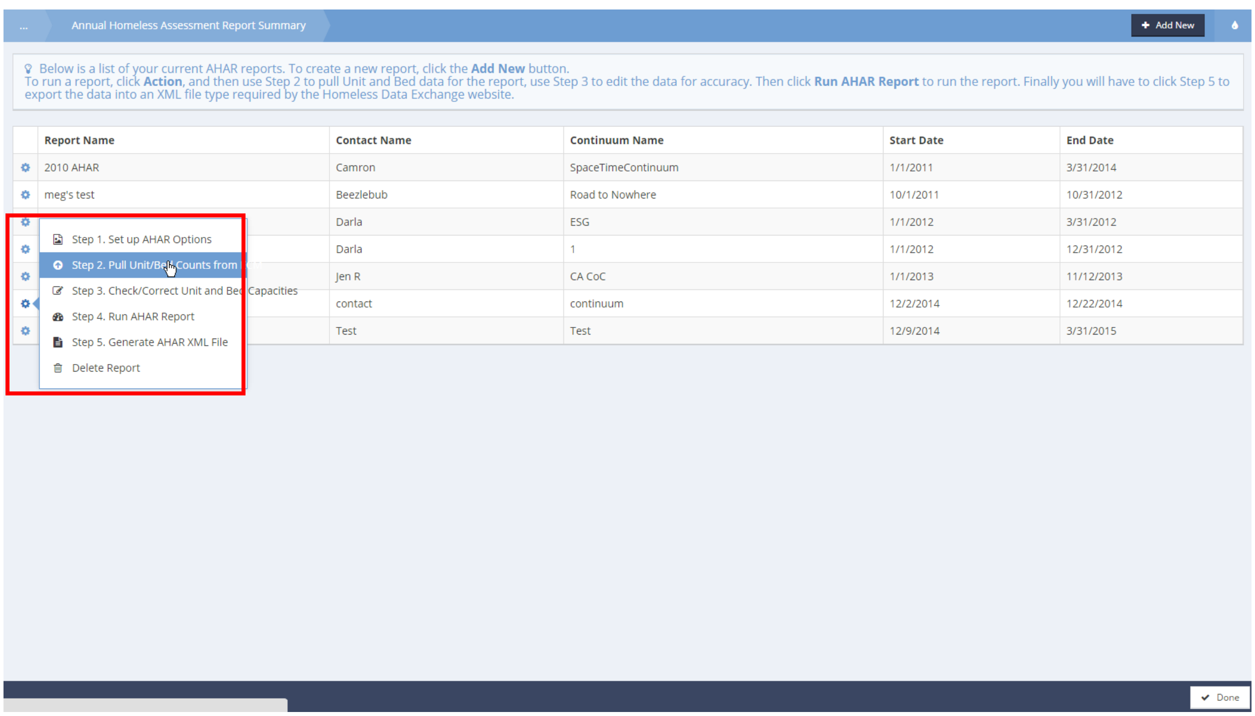


Enter information into required fields: Report Year, Begin Date, End Date, Organization, Project, Continuum Name, and Contact Name. Fill remaining fields as desired. Click the Save button to save and exit.

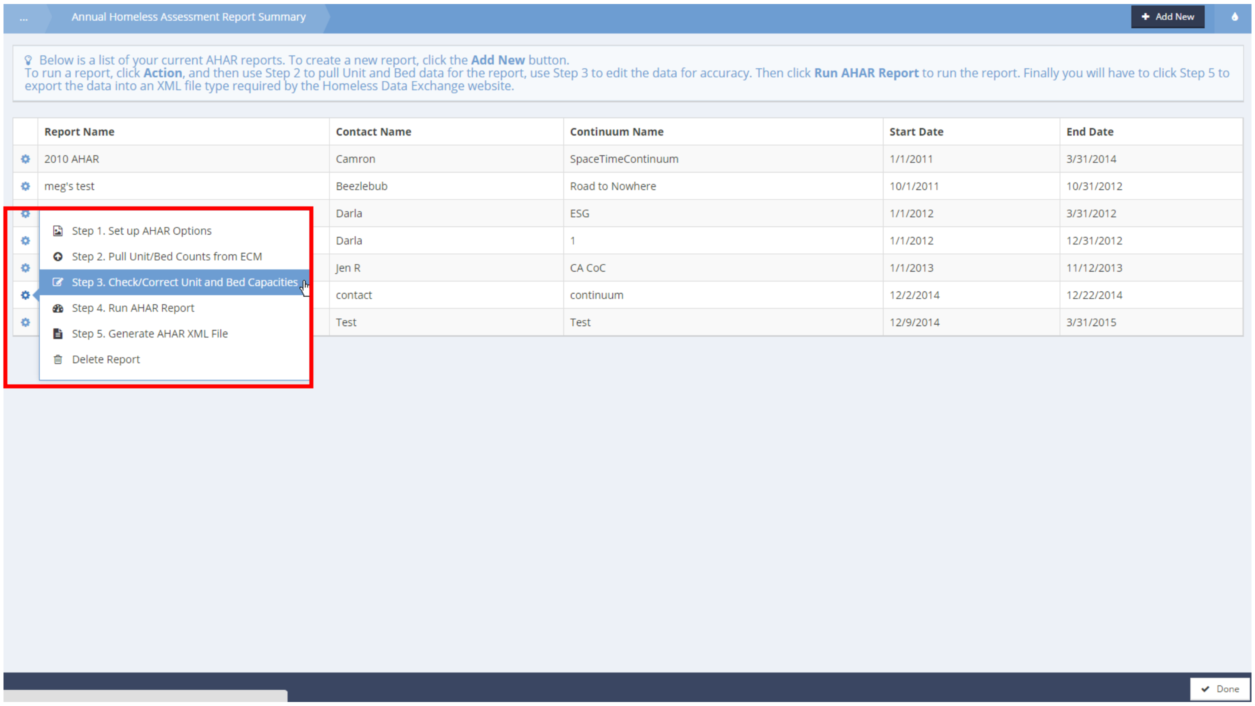
The report now appears in the AHAR Summary.



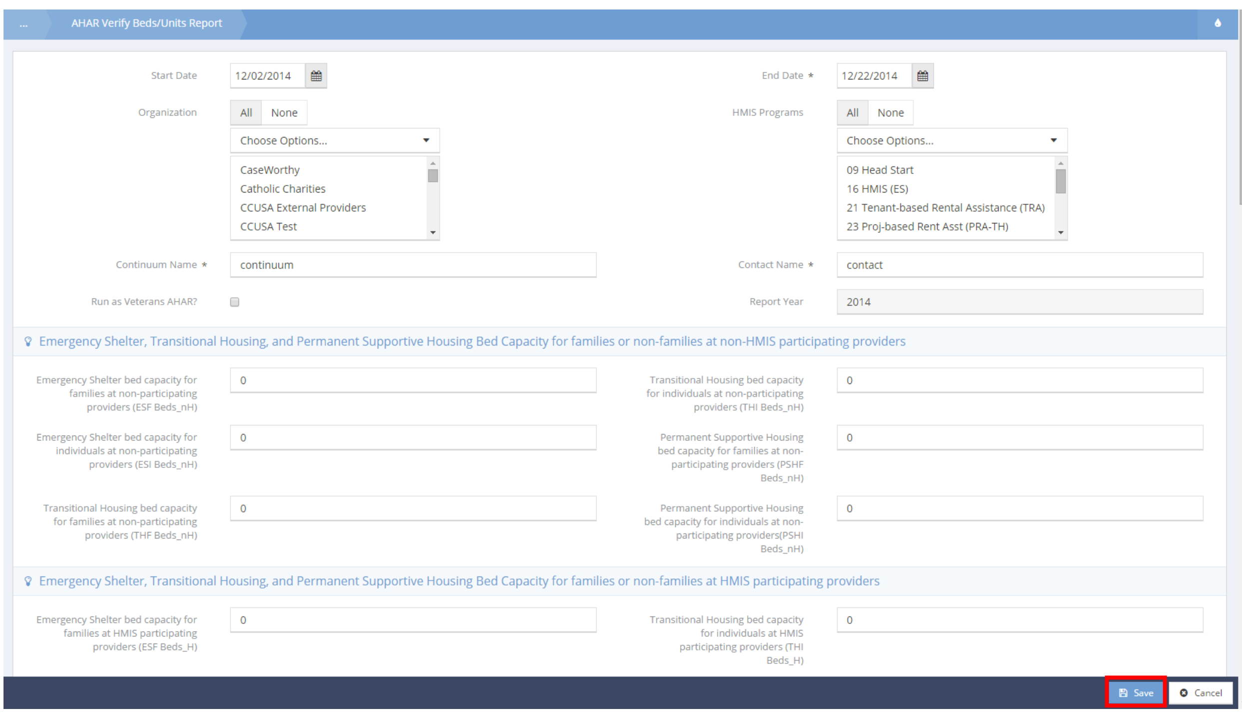
Click the action gear and click Step 2.



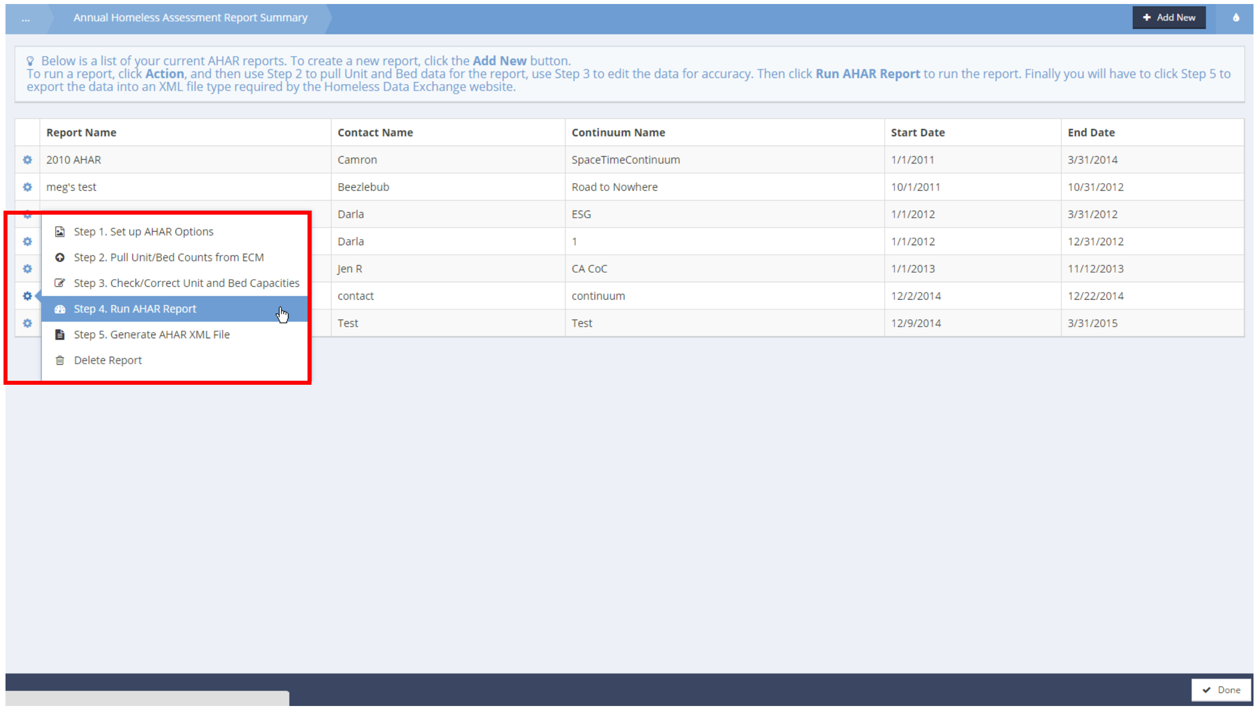
Click the action gear again and click Step 3.



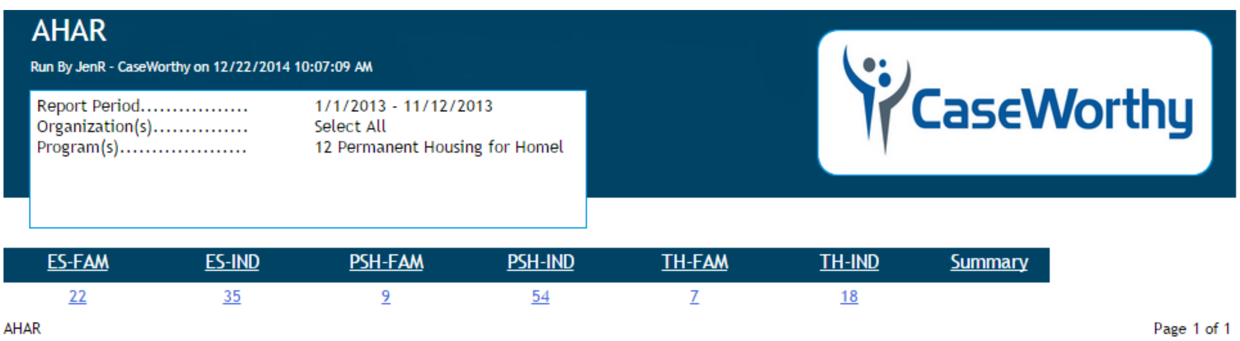
Check that all unit and bed capacities are correct and click on the Save button.



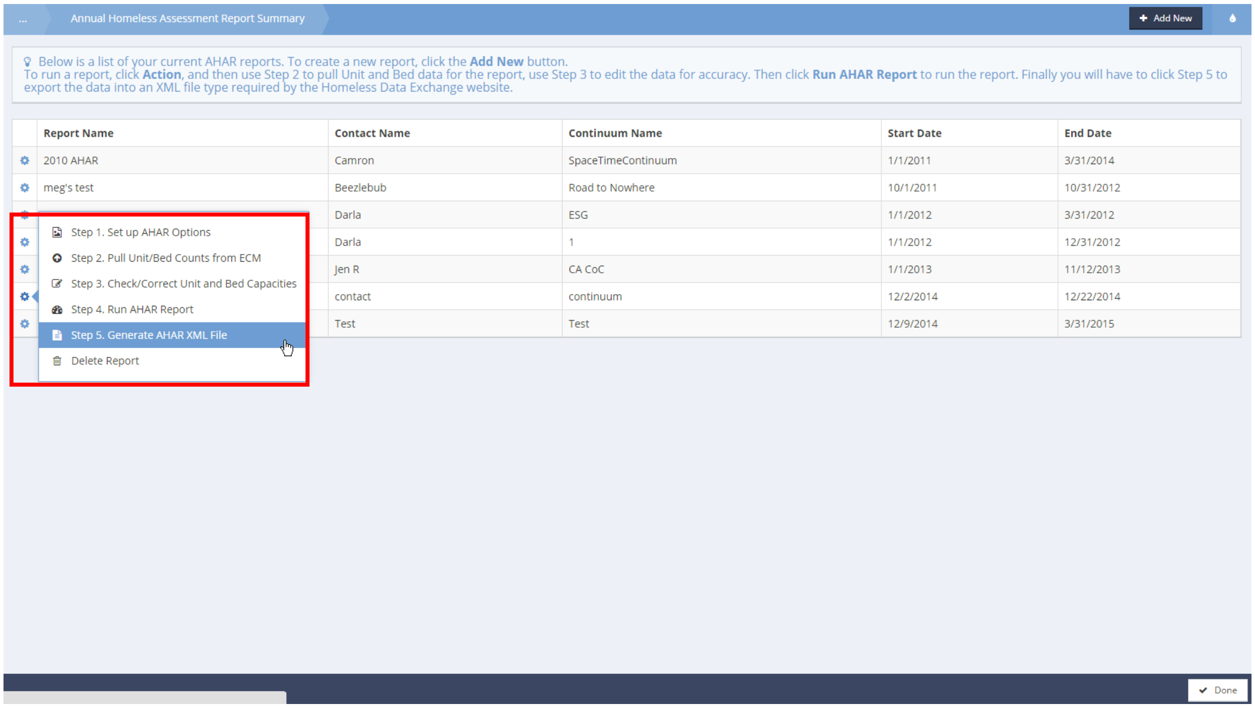
Click the action gear and click Run AHAR Report.



The report displays in a new window.



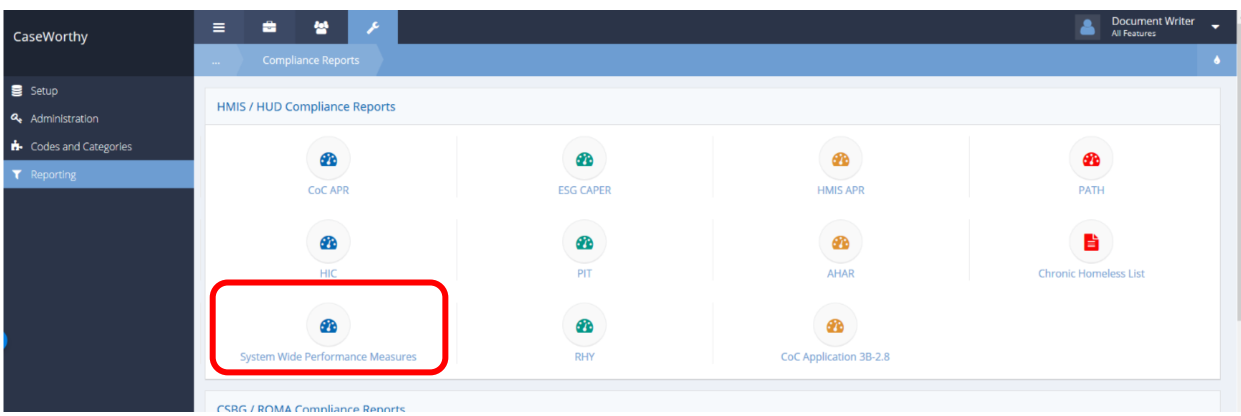
Click the action gear and click Step 5 to export the data in an XML file required by the Homeless Data Exchange website.



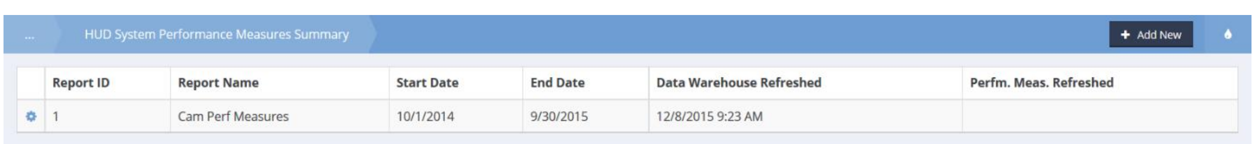
System Wide Performance Measures

Objective: View, and refresh existing HUD reports.

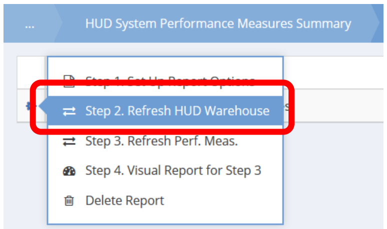
Navigation: Administration>Reporting>Compliance Reports



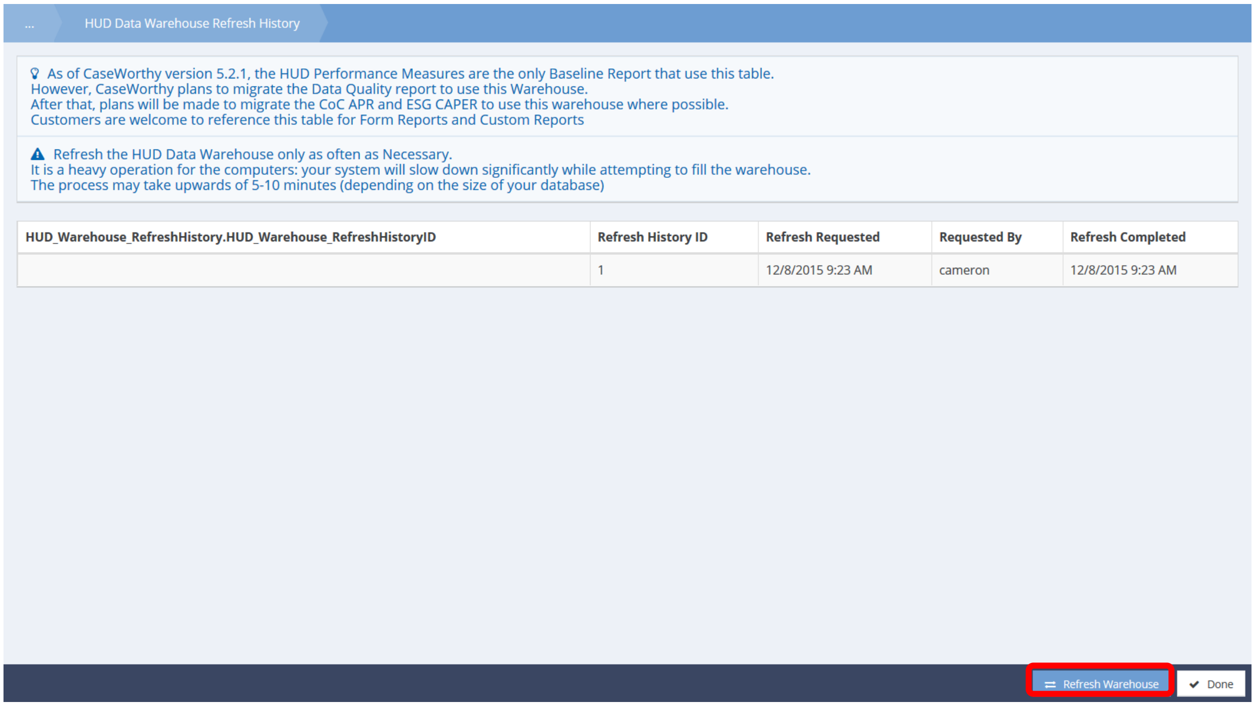
Select System Wide Performance Measures from the HMIS / HUD Compliance Reports portion of the Compliance Reports dashboard. The HUD System Performance Measures Summary form displays.



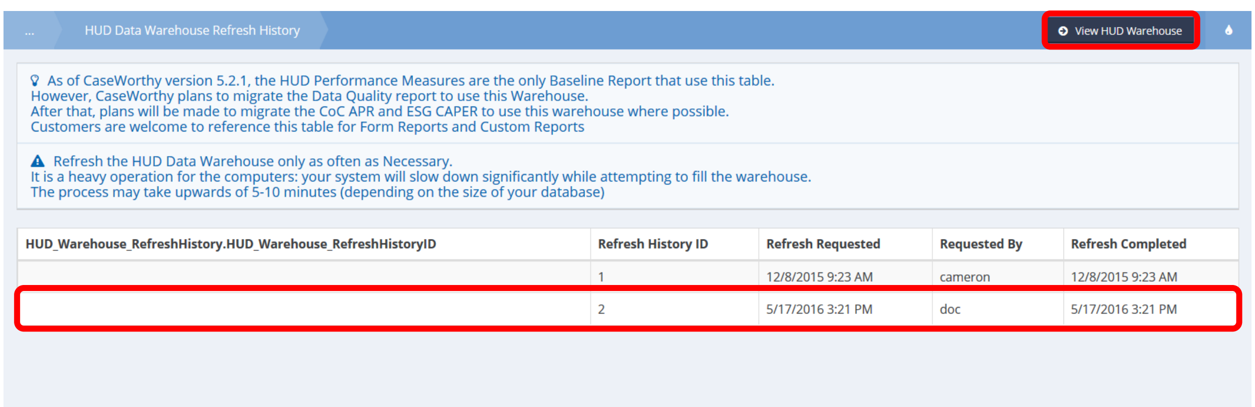
To add a new report, click the Add New button. To edit/run an existing report, click the action gear icon associated with the desired report and select the appropriate option from the menu options. To refresh the HUD data, click on the action gear icon associated with the desired report and select Step. 2 Refresh HUD Warehouse from the menu options.



The HUD Data Warehouse Refresh History form displays.

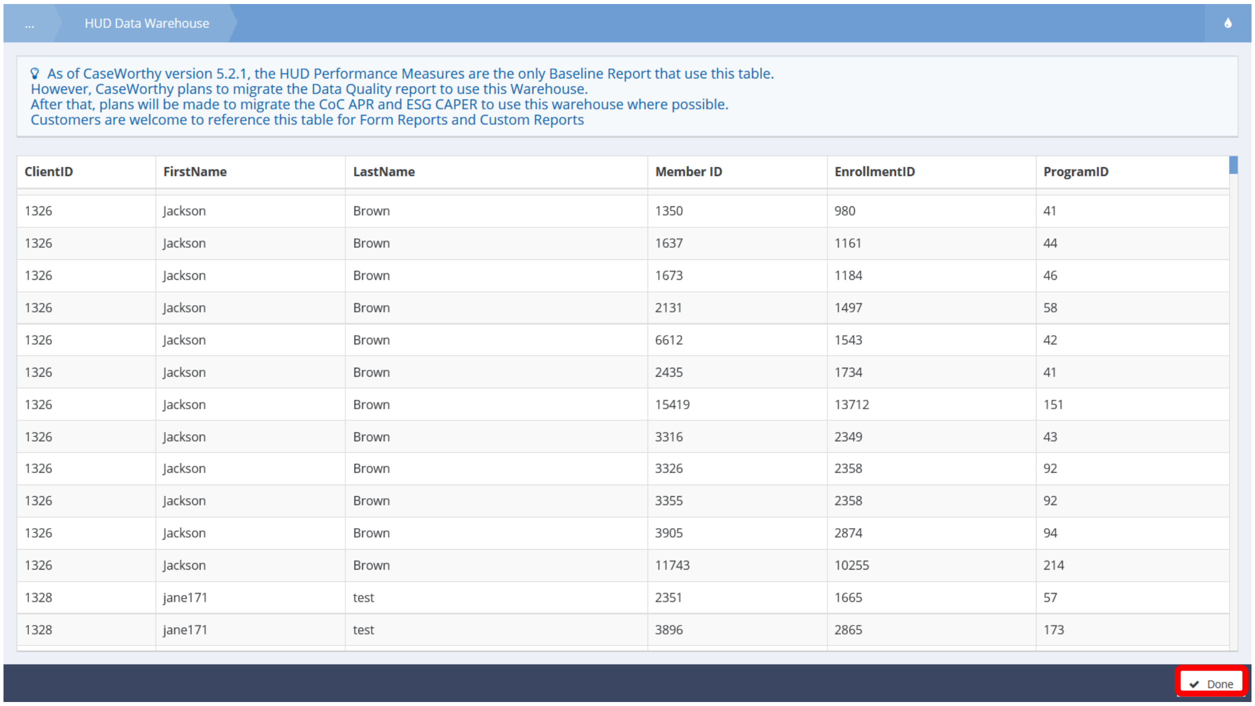


Click the Refresh Warehouse button. A new line appears with data from the refresh.



To view the data warehouse, click the View HUD Warehouse button.

The HUD Data Warehouse form displays.



ClientID	FirstName	LastName	Member ID	EnrollmentID	ProgramID
1326	Jackson	Brown	1350	980	41
1326	Jackson	Brown	1637	1161	44
1326	Jackson	Brown	1673	1184	46
1326	Jackson	Brown	2131	1497	58
1326	Jackson	Brown	6612	1543	42
1326	Jackson	Brown	2435	1734	41
1326	Jackson	Brown	15419	13712	151
1326	Jackson	Brown	3316	2349	43
1326	Jackson	Brown	3326	2358	92
1326	Jackson	Brown	3355	2358	92
1326	Jackson	Brown	3905	2874	94
1326	Jackson	Brown	11743	10255	214
1328	jane171	test	2351	1665	57
1328	jane171	test	3896	2865	173

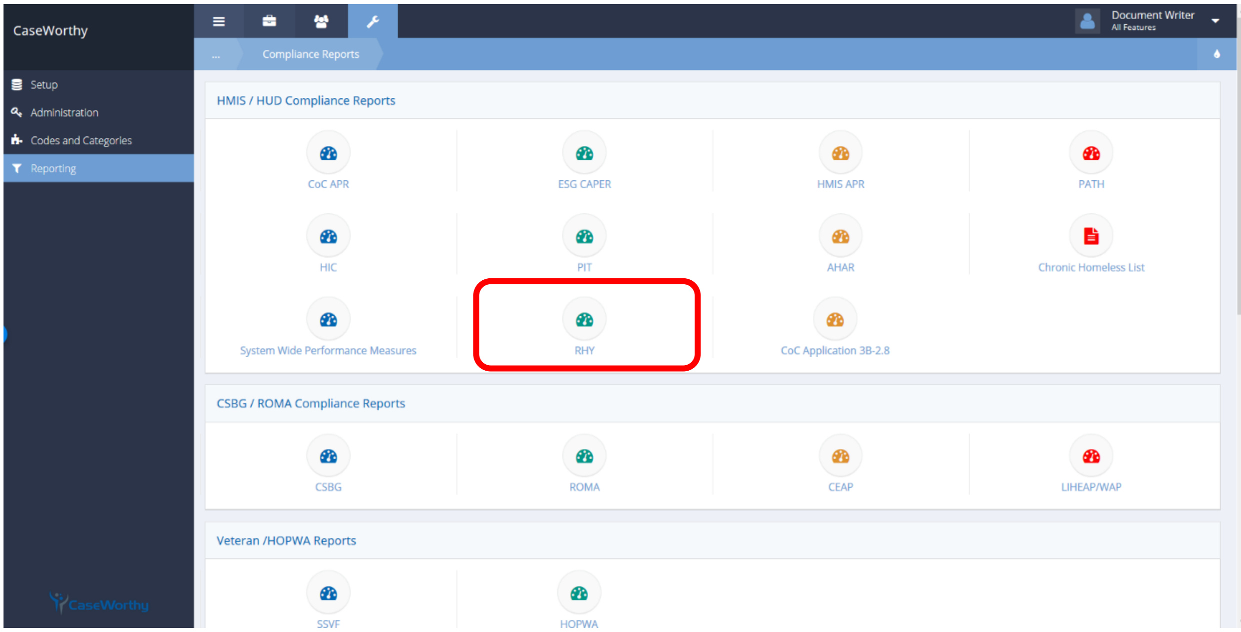
Click the

button when finished.

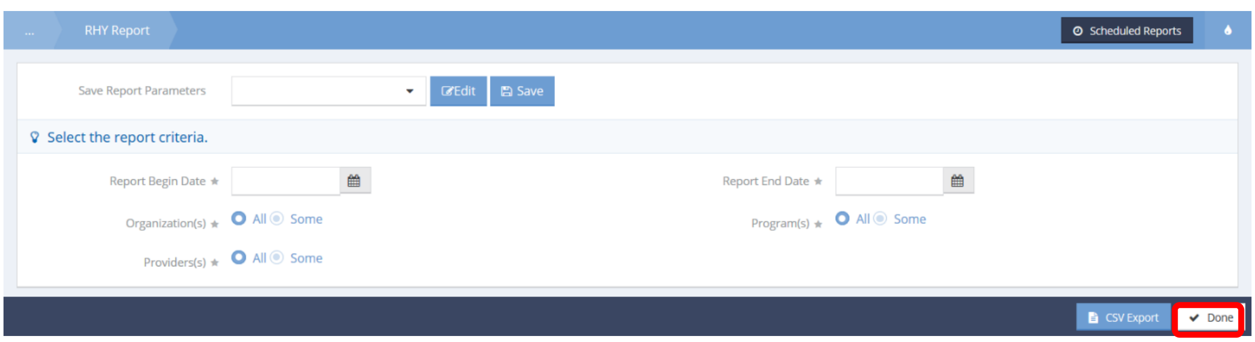
RHY

Objective: Create RHY reports.

Navigation: Administration>Reporting>Compliance Reports



Select RHY from the HMIS / HUD Compliance Reports portion of the Compliance Reports dashboard. The RHY Report form displays.



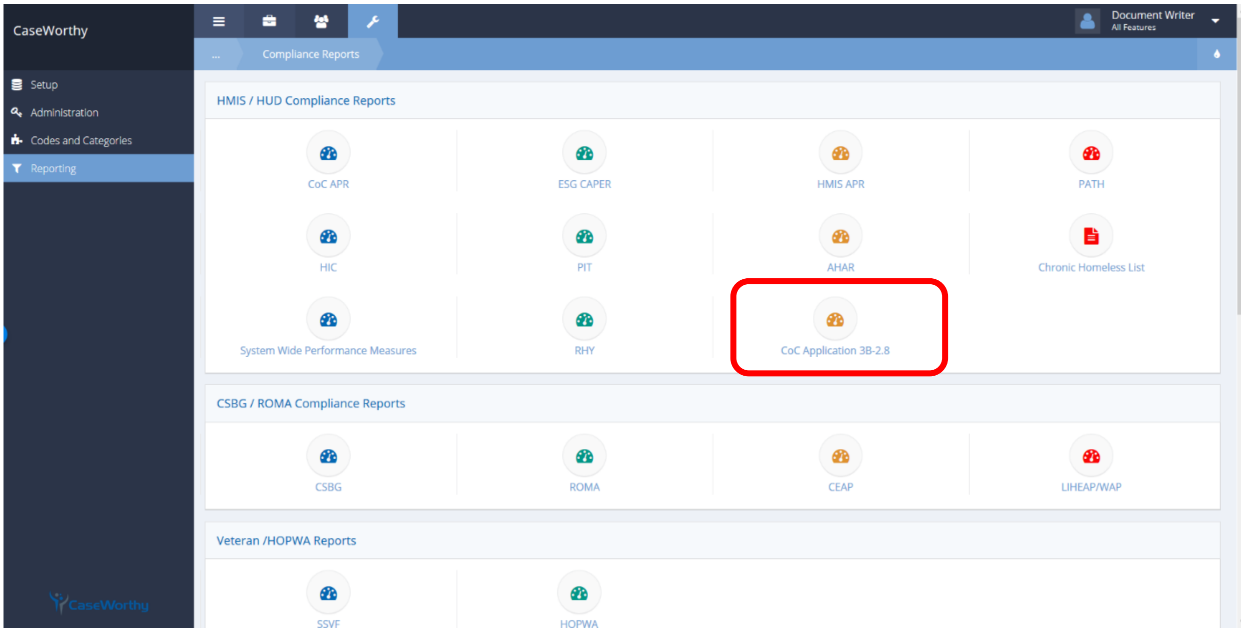
Enter information into required fields: Report Begin Date, Report End date, Organization(s), Program(s), and Provider(s). Fill remaining fields as desired. To view or add scheduled reports click the Scheduled Reports button. To export, click the CSV Export button.

Click the Done button when finished.

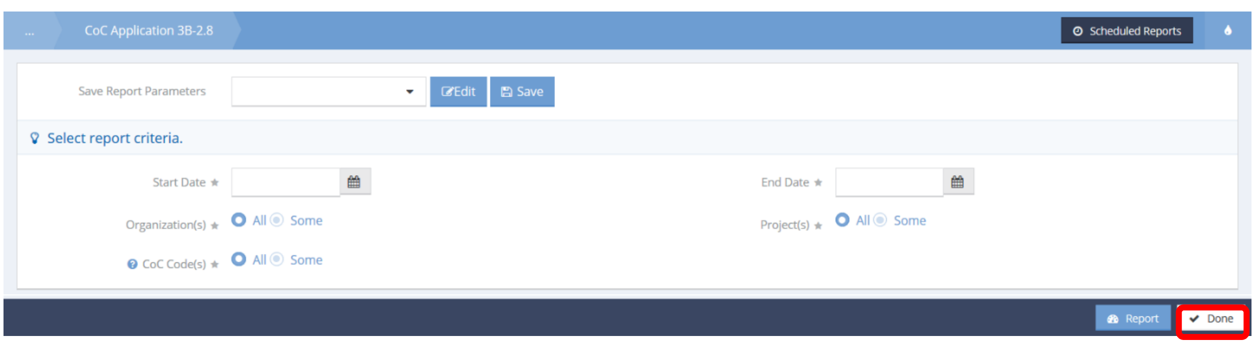
CoC Application 3B-2.8

Objective: Create CoC Application 3B-2.8 reports.

Navigation: Administration>Reporting>Compliance Reports



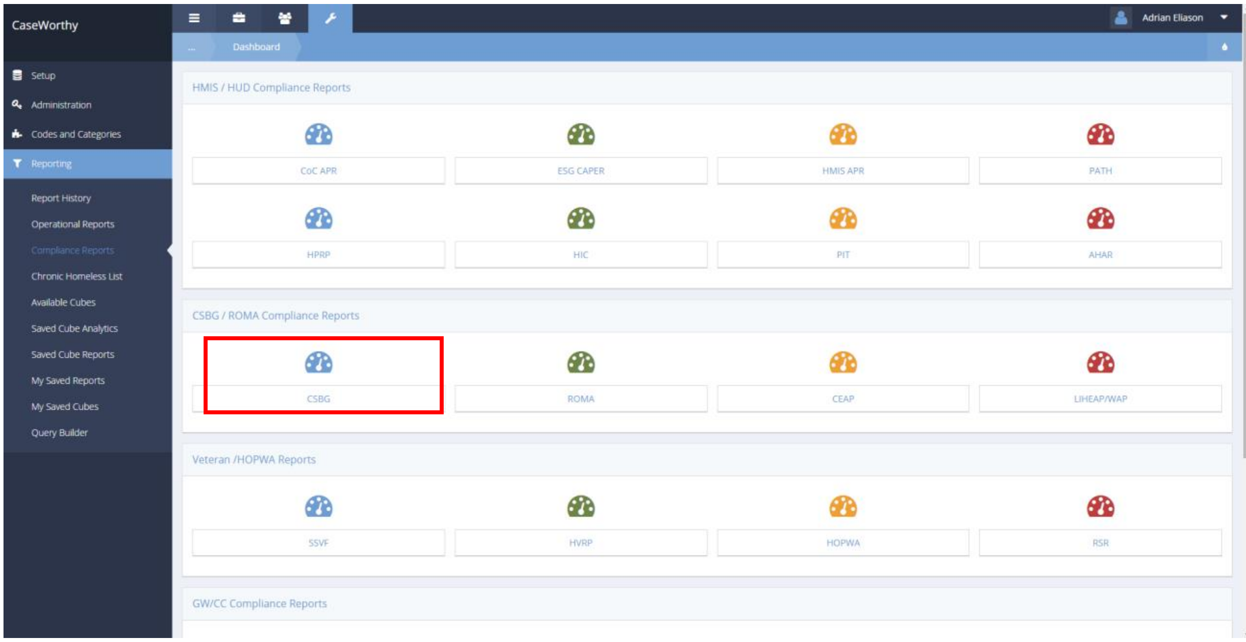
Select the CoC Application 3B-2.8 from the HMIS / HUD Compliance Reports portion of the Compliance Reports dashboard. The CoC Application 3B-2.8 form displays.



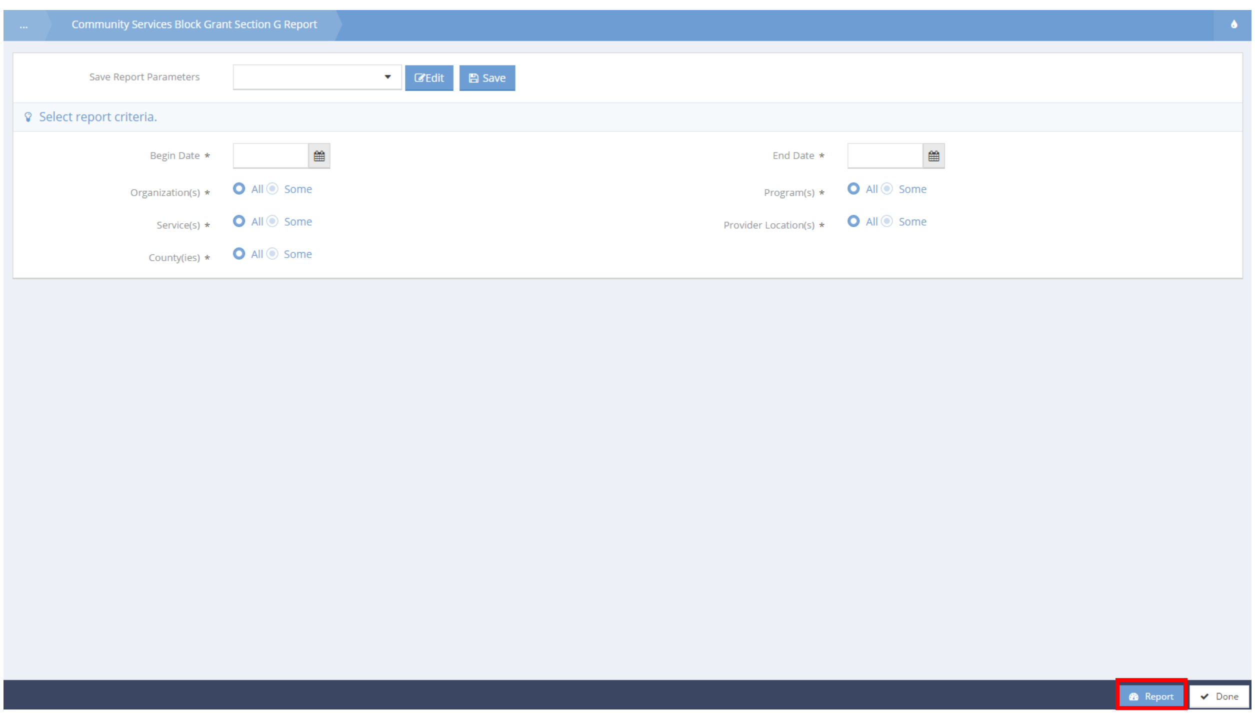
Enter information into required fields: Start Date, End Date, Organization(s), Project(s), and CoC Code(s). Fill remaining fields as desired. To view or add scheduled reports, click the Scheduled Reports button. To export a report, click the Report button. A new pop-up window opens. Click the Done button when finished.

CSBG

To run a CSBG report, click the CSBG icon.



Enter a begin date and end date. Choose any organizations, programs, services, provider locations, and counties. Click Report when finished.



The report displays in a new window.

Section G Program Participant Characteristic

Run By aeliason - CaseWorthy on 12/22/2014 10:12:01 AM

Report Period	12/1/2014 - 12/22/2014
Organization(s)	Select All
Program(s)	Select All
Service(s)	Select All
Location(s)	Select All

Total unduplicated number of persons about whom one or more characteristics were obtained:	34
Total unduplicated number of persons about whom no characteristics were obtained:	0
Total unduplicated number of households about whom one or more characteristics were obtained:	31
Total unduplicated number of households about whom no characteristics were obtained:	0

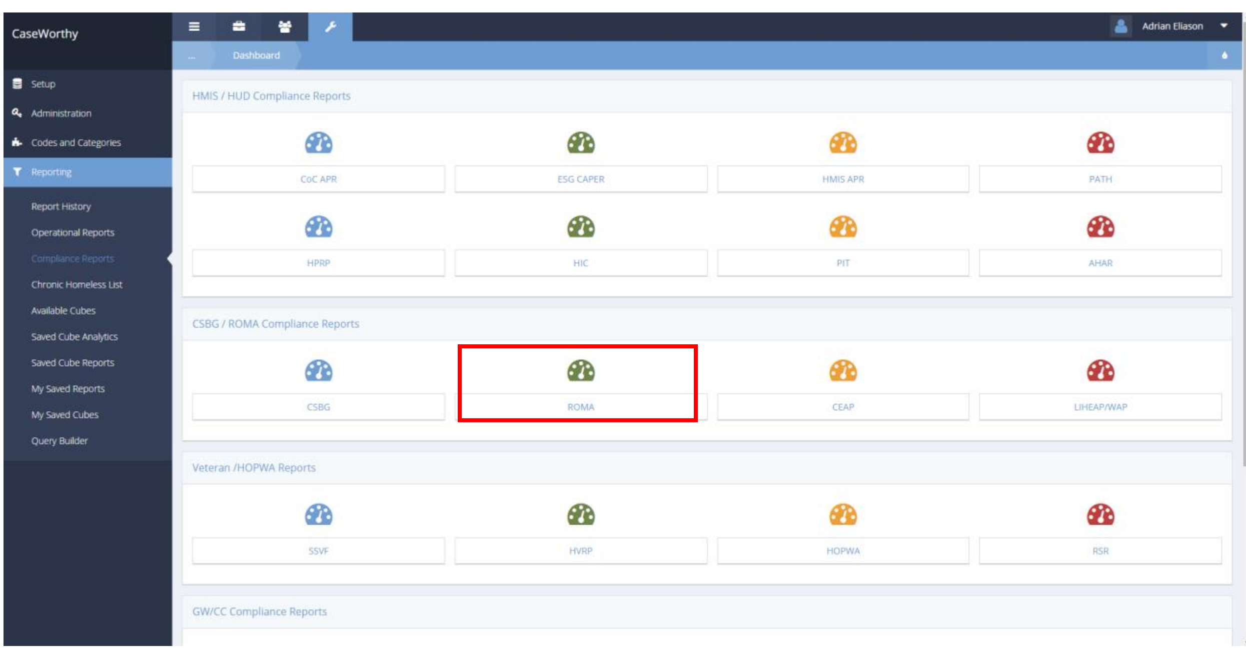
1. Gender	Number of Persons*	Number of Households***
	2	1
Male	20	20
Female	12	12
Gender Total:	34	31

2. Age	Number of Persons*	Number of Households***
0-5	1	1
6-11	1	1
12-17	2	2
18-23	3	3
24-44	15	15
45-54	2	2
55-69	5	5
70+	1	1
Unspecified	4	4
Age Total:	34	31

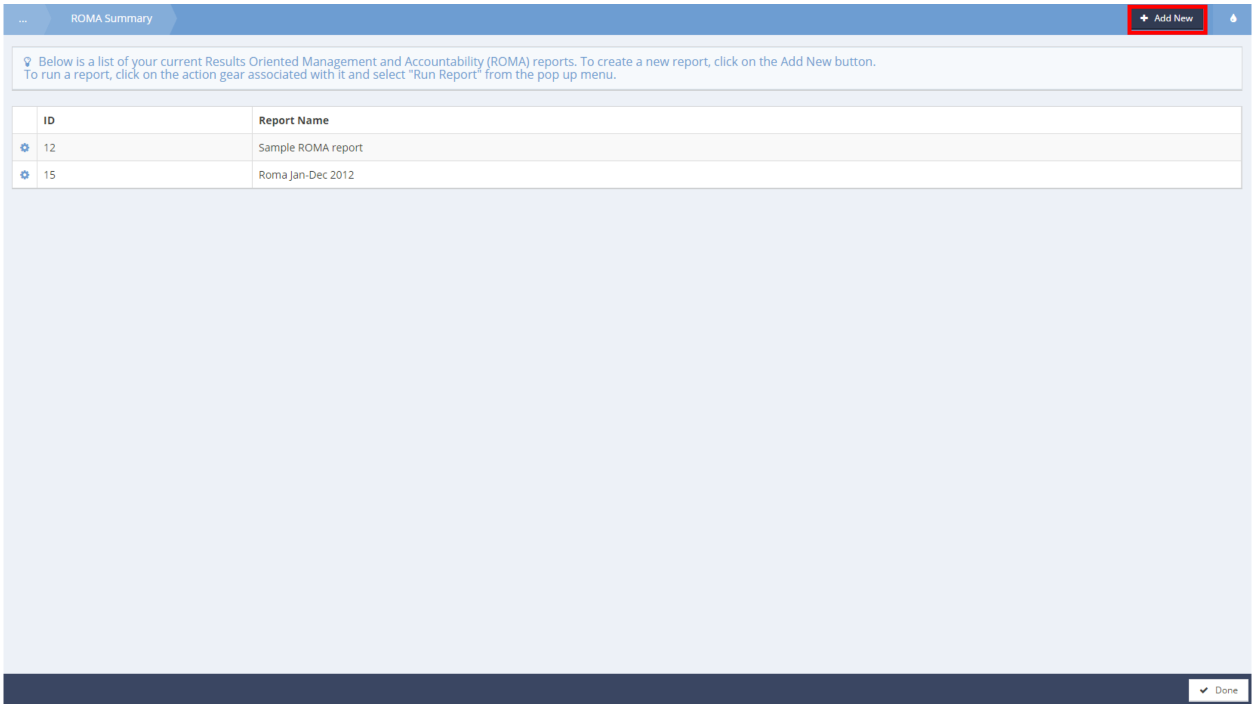
3. Race/Ethnicity	Number of Persons*	Number of Households***
3a. Race		
White	10	8
Black or African American	1	1
American Indian and Alaska	1	1
Asian	6	6
Other	4	4
Multi-Race	12	12
Race Total:	34	31

ROMA

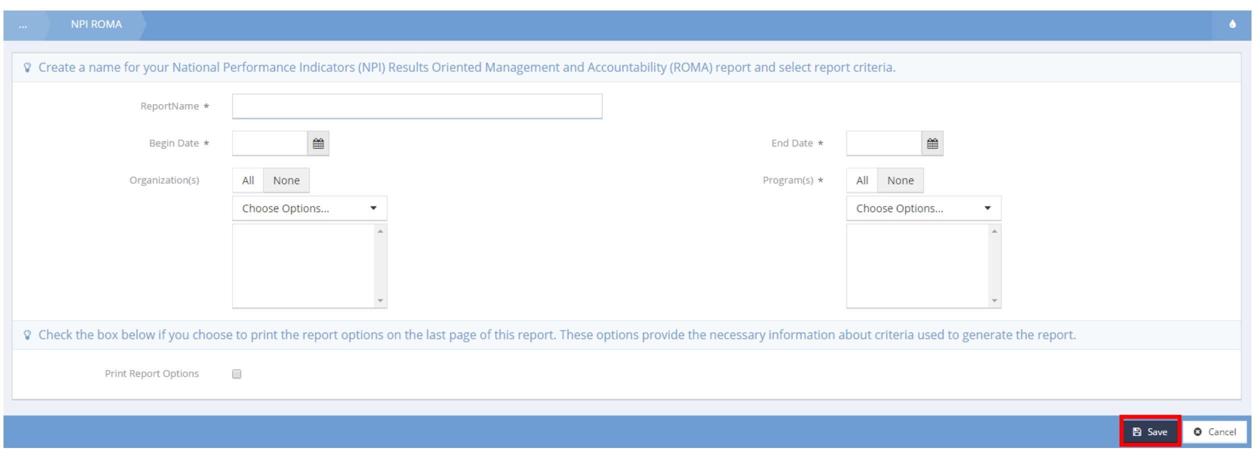
To run a ROMA report, click the ROMA icon.



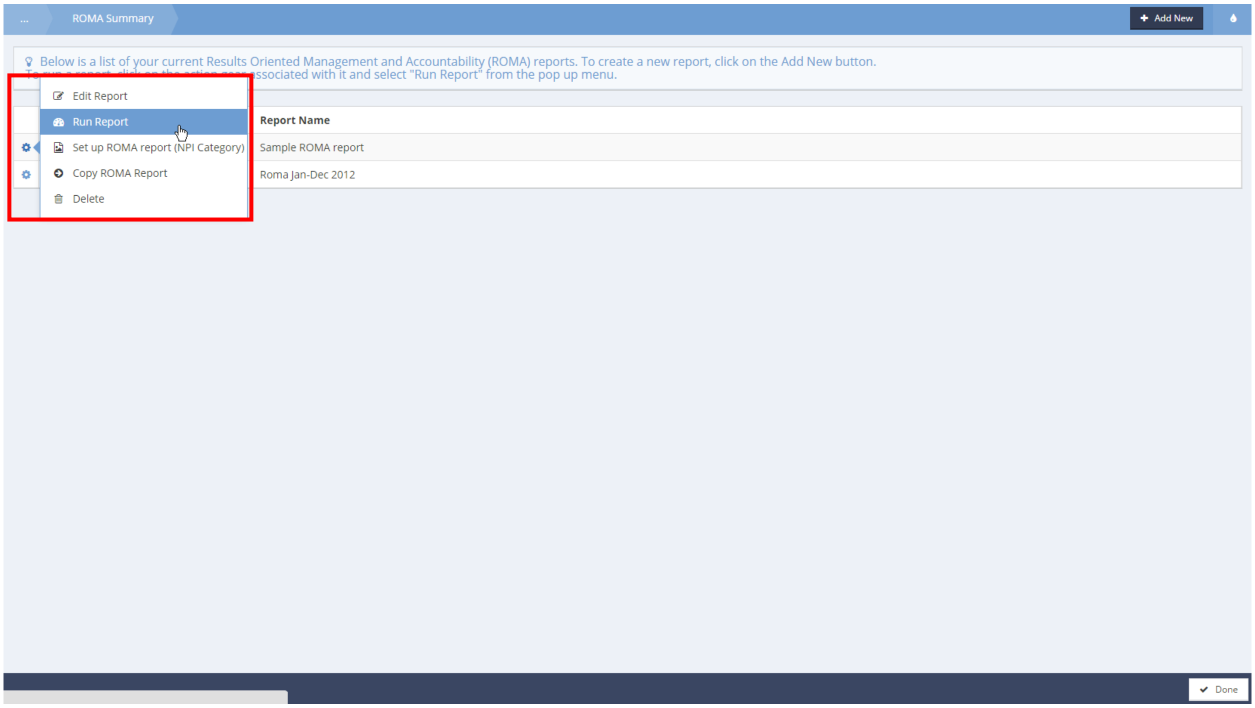
To create a new ROMA report, click the Add New button.



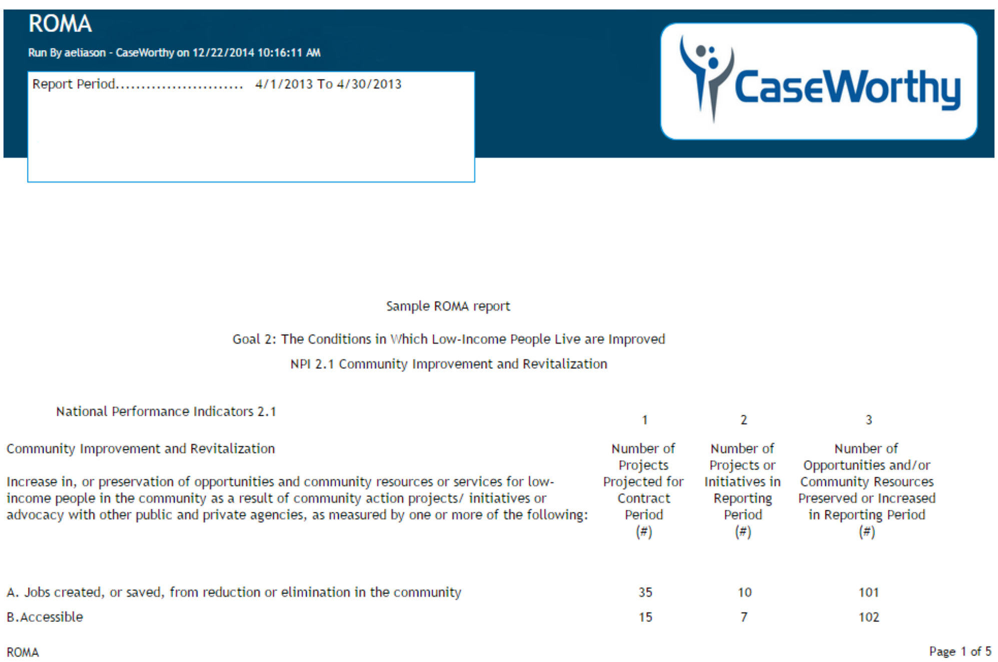
Enter a report name, begin date, and end date. Choose any organizations and programs. Click Save when done. The report is added to the report summary.



To run a report, click the action gear and click Run Report.



The report displays in a new window.



ROMA

Run By aeliason - CaseWorthy on 12/22/2014 10:16:11 AM

Report Period........................ 4/1/2013 To 4/30/2013

CaseWorthy

Sample ROMA report

Goal 2: The Conditions in Which Low-Income People Live are Improved

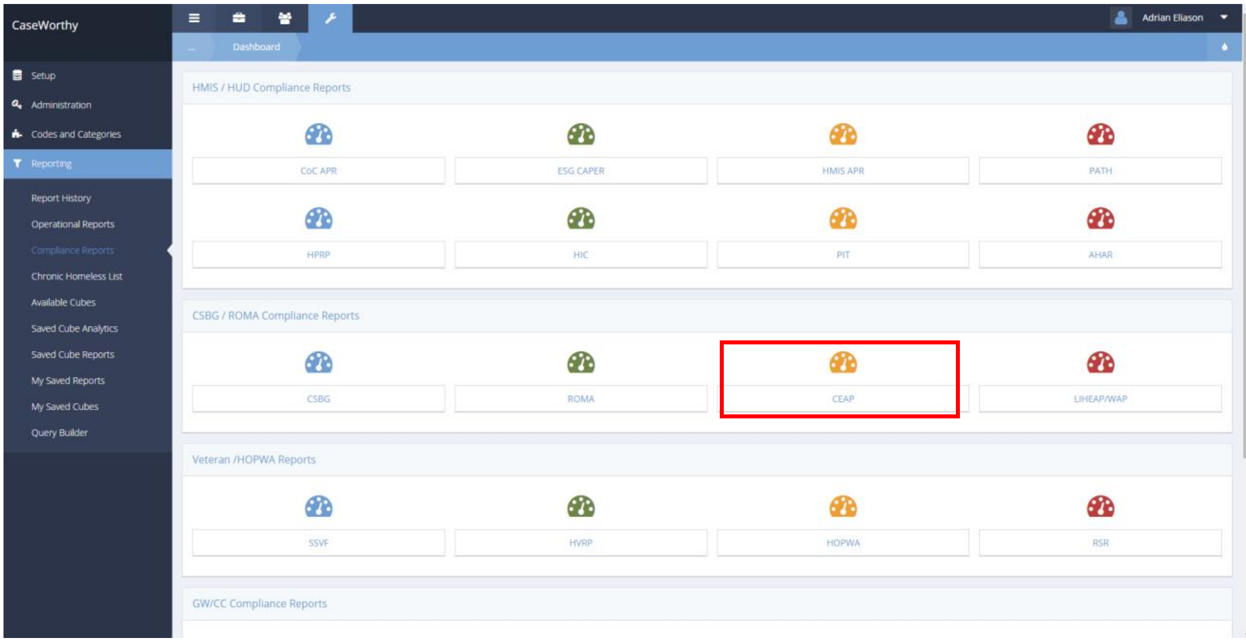
NPI 2.1 Community Improvement and Revitalization

National Performance Indicators 2.1	1	2	3
Community Improvement and Revitalization Increase in, or preservation of opportunities and community resources or services for low-income people in the community as a result of community action projects/ initiatives or advocacy with other public and private agencies, as measured by one or more of the following:	Number of Projects Projected for Contract Period (#)	Number of Projects or Initiatives in Reporting Period (#)	Number of Opportunities and/or Community Resources Preserved or Increased in Reporting Period (#)
A. Jobs created, or saved, from reduction or elimination in the community	35	10	101
B.Accessible	15	7	102

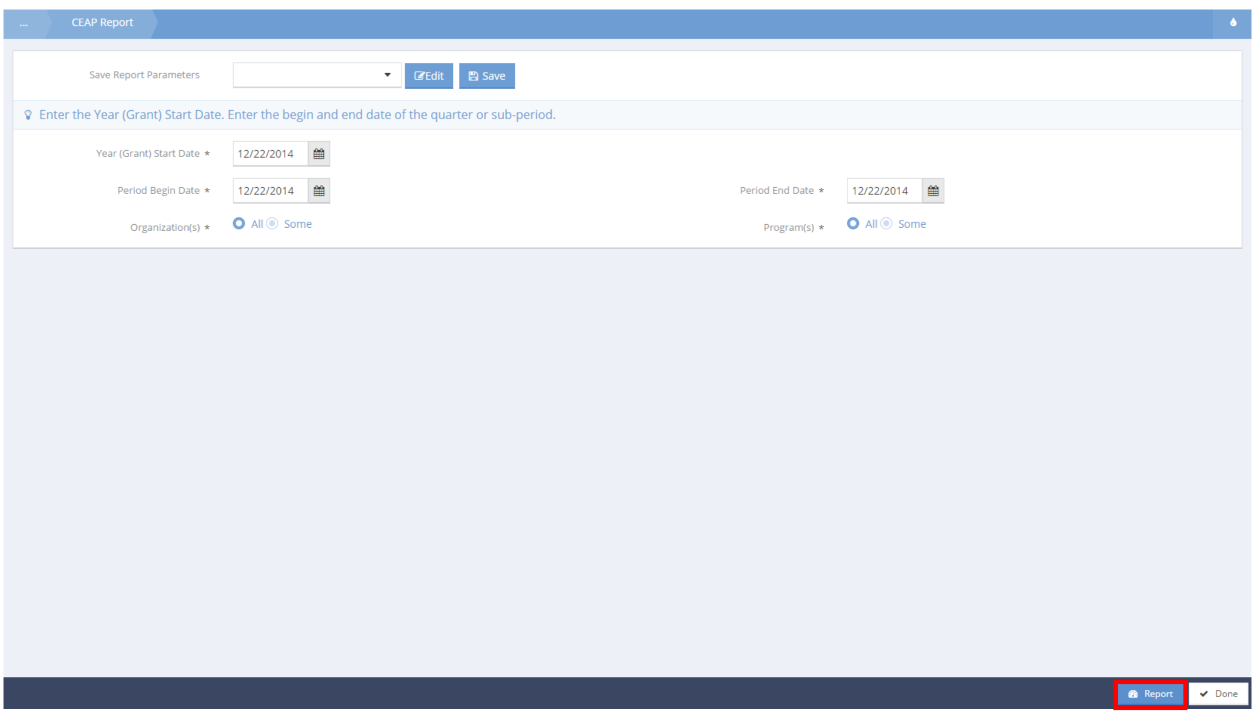
ROMA Page 1 of 5

CEAP

To run a CEAP report, click the CEAP icon.



Enter a Year (Grant) Start Date, period begin and end dates, and choose any organizations and programs. Click Report when finished.



The report displays in a new window.

CEAP

Run By aeliason - CaseWorthy on 12/22/2014 10:19:39 AM

Year Start Date	12/2/2014
Report Period..............	12/2/2014 - 12/22/2014
Organization(s)...........	All Orgs
Program(s)................	All Programs

Summary withy Drilldowns			Household Crisis		Utility Assistance	
County	Period	Year	Period	Year	Period	Year
Duplicated Households	176	176	0	0	0	0
Duplicated Individuals	400	400				
Unduplicated Households	34	34	0	0	4	4
Unduplicated Individuals	45	45			11	11
Applicant Households	130	130	0	0	7	7

IV.A
Duplicated Households by County

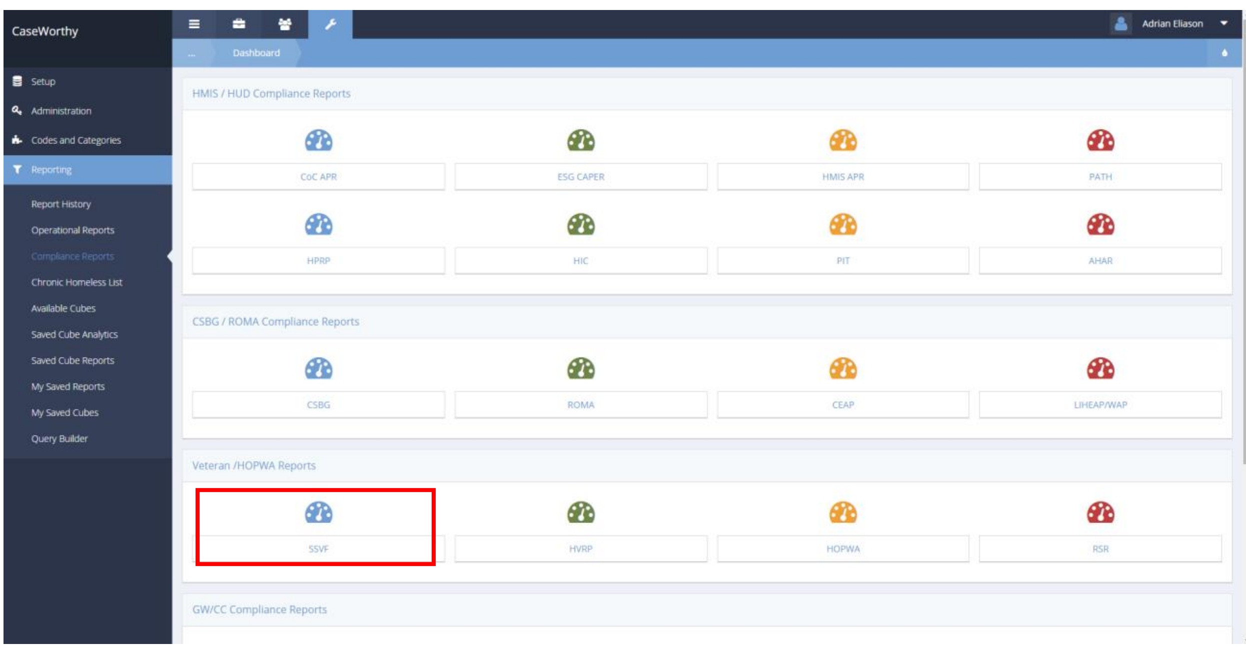
County	Period	Year
	4	4
COOK	2	2
DAVIS	3	3
DUVAL	3	3
GUADALUPE	3	3
LOGAN	3	3
MARICAO	21	21
MIDDLESEX	1	1
PIERCE	1	1
SAINT CHARLES	2	2
SAINT LOUIS CITY	21	21
SALT LAKE	108	108
SCHENECTADY	21	21
TRAVIS	4	4
Total	176	176

IV.A
Duplicated Individuals by County

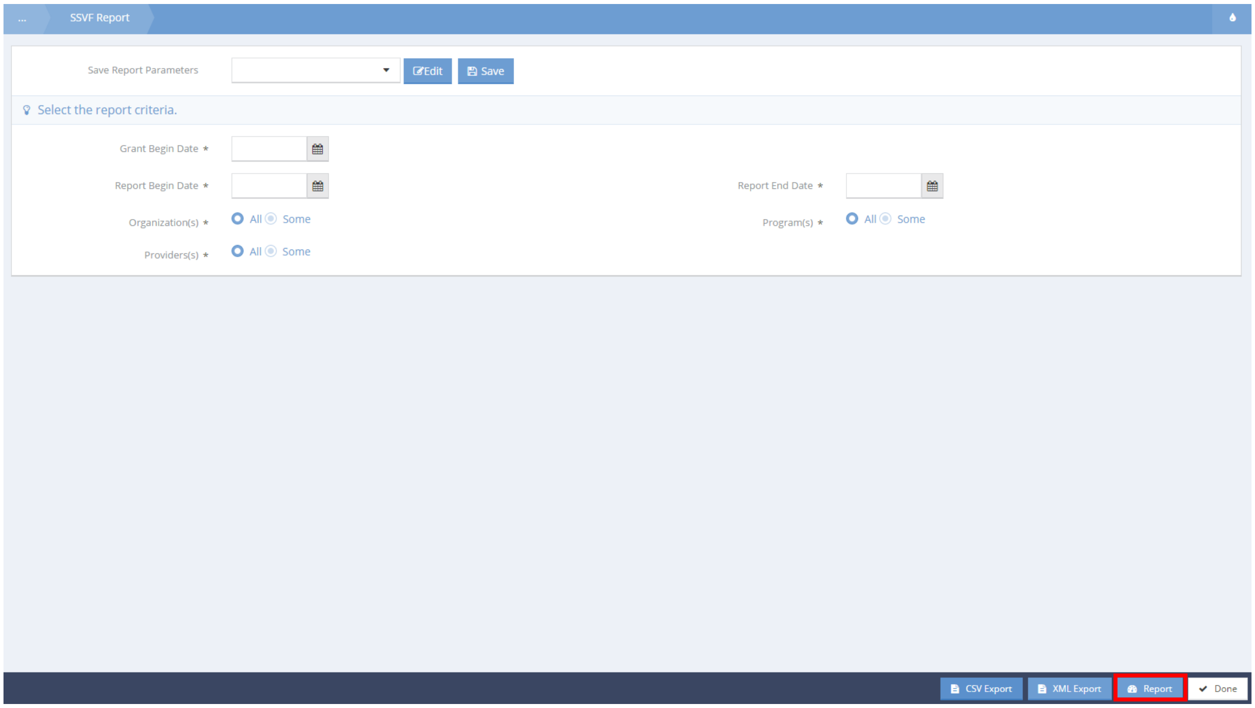
County	Period	Year
	4	4
COOK	2	2
DAVIS	12	12

SSVF

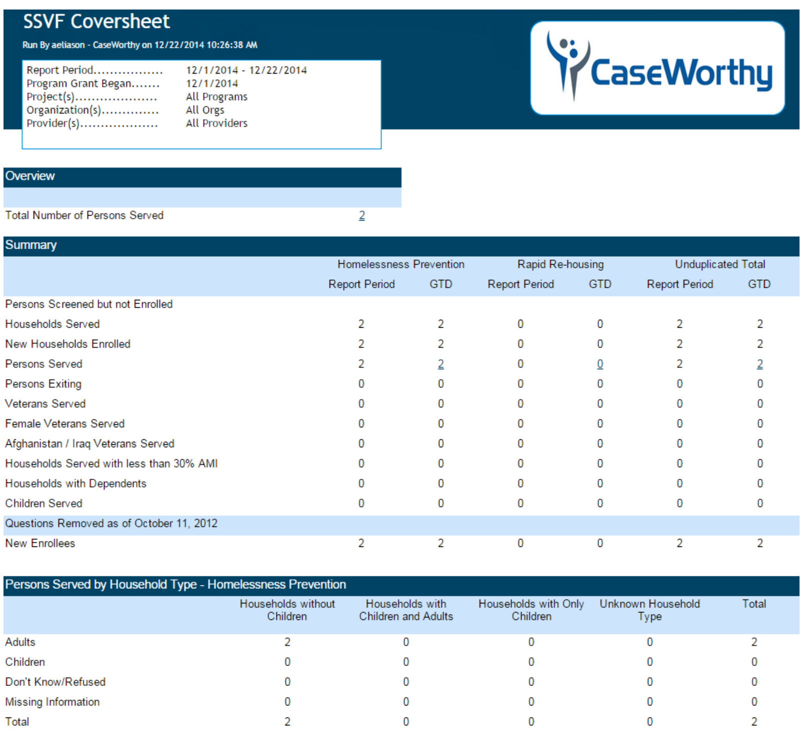
To run a SSVF report, click the SSVF icon.



Enter a grant begin date, report begin date, and report end date. Choose any organizations, programs, and providers. Click Report when finished.



The report displays in a new window.



SSVF Coversheet

Run By aeliason - CaseWorthy on 12/22/2014 10:26:38 AM

Report Period................	12/1/2014 - 12/22/2014
Program Grant Began.......	12/1/2014
Project(s)....................	All Programs
Organization(s)..............	All Orgs
Provider(s)...................	All Providers

CaseWorthy

Overview

Total Number of Persons Served	2

Summary

	Homelessness Prevention		Rapid Re-housing		Unduplicated Total	
	Report Period	GTD	Report Period	GTD	Report Period	GTD
Persons Screened but not Enrolled						
Households Served	2	2	0	0	2	2
New Households Enrolled	2	2	0	0	2	2
Persons Served	2	2	0	0	2	2
Persons Exiting	0	0	0	0	0	0
Veterans Served	0	0	0	0	0	0
Female Veterans Served	0	0	0	0	0	0
Afghanistan / Iraq Veterans Served	0	0	0	0	0	0
Households Served with less than 30% AMI	0	0	0	0	0	0
Households with Dependents	0	0	0	0	0	0
Children Served	0	0	0	0	0	0
Questions Removed as of October 11, 2012						
New Enrollees	2	2	0	0	2	2

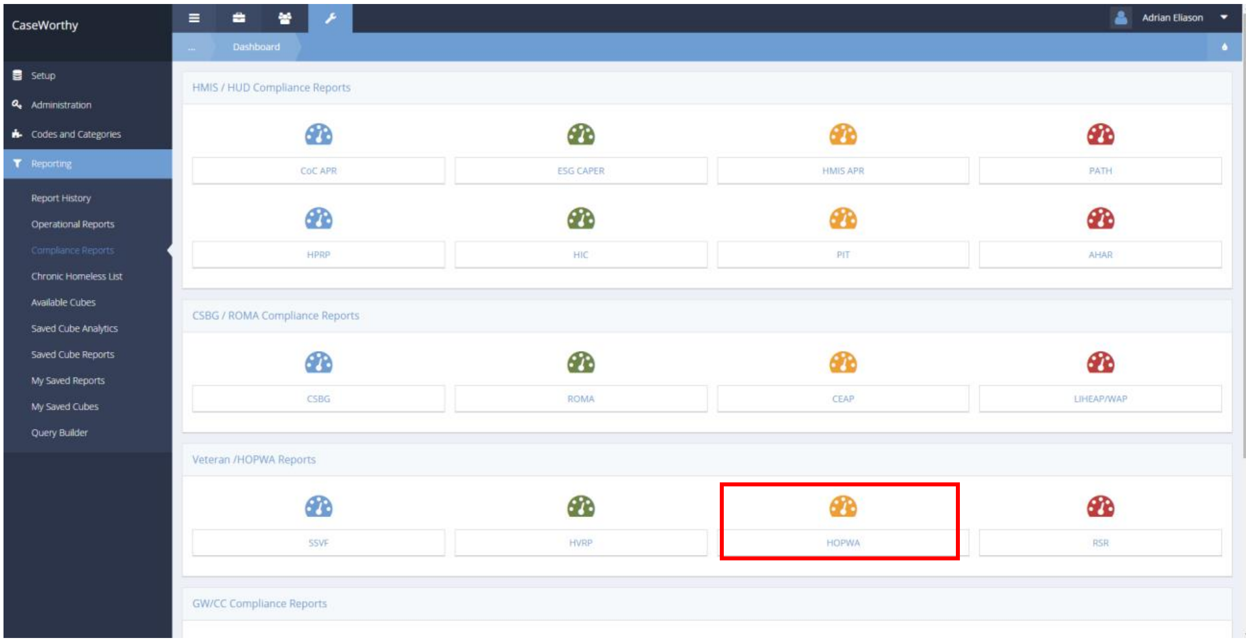
Persons Served by Household Type - Homelessness Prevention

	Households without Children	Households with Children and Adults	Households with Only Children	Unknown Household Type	Total
Adults	2	0	0	0	2
Children	0	0	0	0	0
Don't Know/Refused	0	0	0	0	0
Missing Information	0	0	0	0	0
Total	2	0	0	0	2

SSVF Coverpage Page 1 of 3

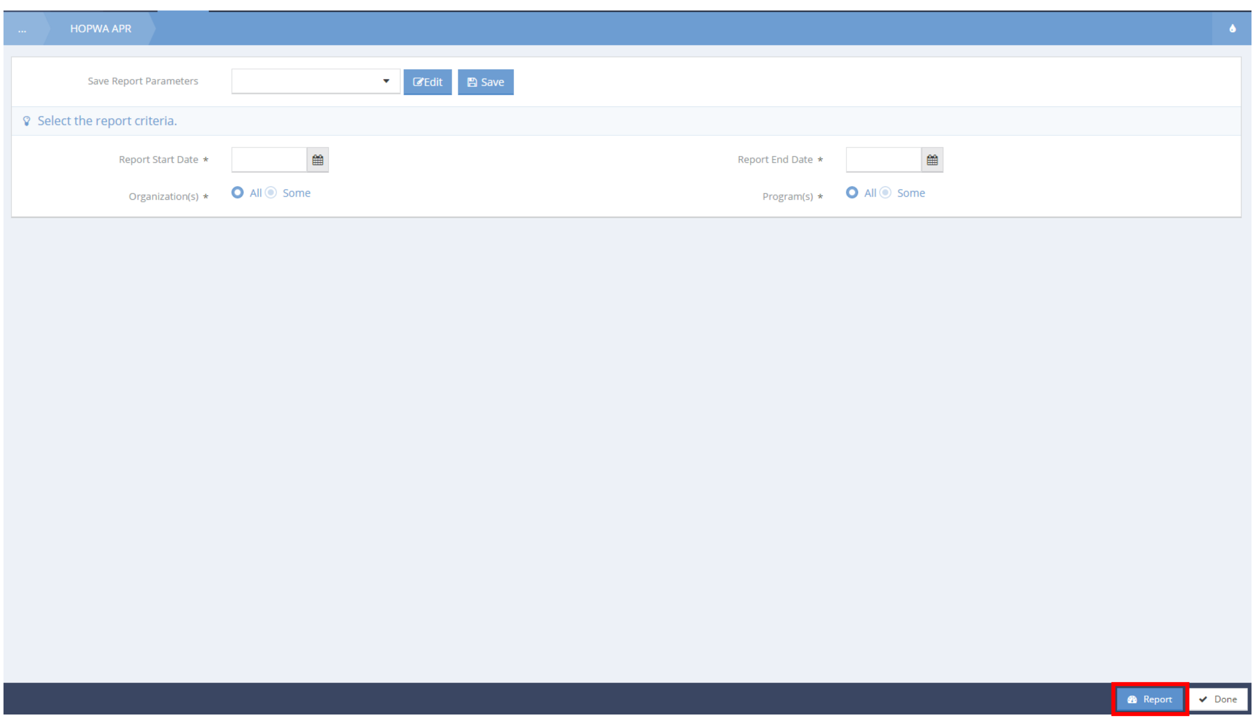
HOPWA

To run a HOPWA report, click the HOPWA icon.



Enter a report start date and end date. Choose any organizations and programs. Click 

when finished.



The report displays in a new window.

HOPWA APR

Run By aeliason - CaseWorthy on 12/22/2014 10:38:52 AM

Report Period...............	12/1/2014 - 12/22/2014
Program.....................	All Programs
Organization(s)............	All Orgs

Master Sub Reports

	Subreport	Answer
1	TOTAL Number of all Beneficiaries Served with HOPWA (Demographics and Outcomes)	453
4	TOTAL Number of Qualifiers Served with system HOPWA-Mapped Service	0

Part 3: Summary Overview of Grant Activities
A. Information on Individuals, Beneficiaries, and Households Receiving HOPWA Housing Subsidy Assistance

Part 3.A – Section 1. Individuals

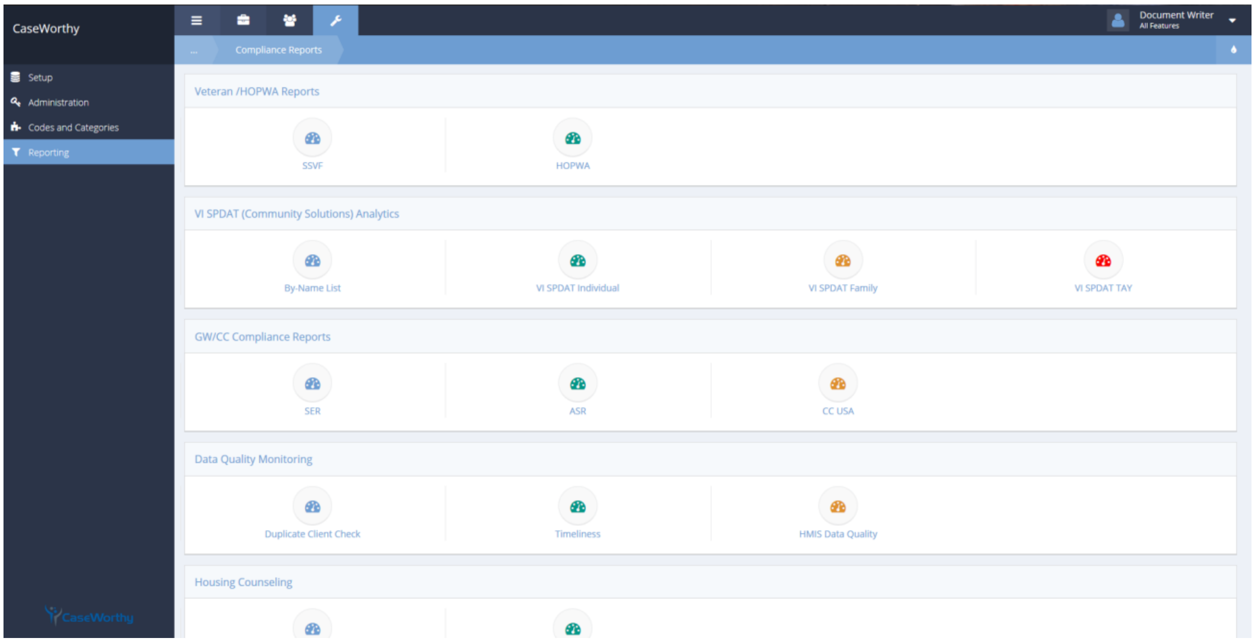
a	Total HOPWA eligible individuals receiving HOPWA Housing Subsidy Assistance	Answer
	Individuals with HIV/AIDS who qualified their household to receive HOPWA housing subsidy assistance	336
b	Prior Living Situation	
1	Continuing to receive HOPWA housing subsidy assistance from the prior operating year	331
New Individuals who received HOPWA Housing Subsidy Assistance support during Operating Year		
2	Place not meant for human habitation	0
3	Emergency shelter	0
4	Transitional housing for homeless persons	0
5	Sum of Rows 2 – 4	0
6	Permanent housing for formerly homeless persons	0
7	Psychiatric hospital or other psychiatric facility	0
8	Substance abuse treatment facility or detox center	0
9	Hospital	0
10	Foster care home or foster care group home	0
11	Jail, prison or juvenile detention facility	0
12	Rented room, apartment, or house	0
13	House you own	0
14	Staying or living in someone else's room, apartment, or house	0
15	Hotel or motel paid for by individual	0
16	Other	0
17	Don't Know or Refused	8
18	Sum of Rows 1 and 5-17	336

HOPWA APR Report Page 1 of 6

By-Name List of People Experiencing Homelessness

Objective: Launch Homelessness report.

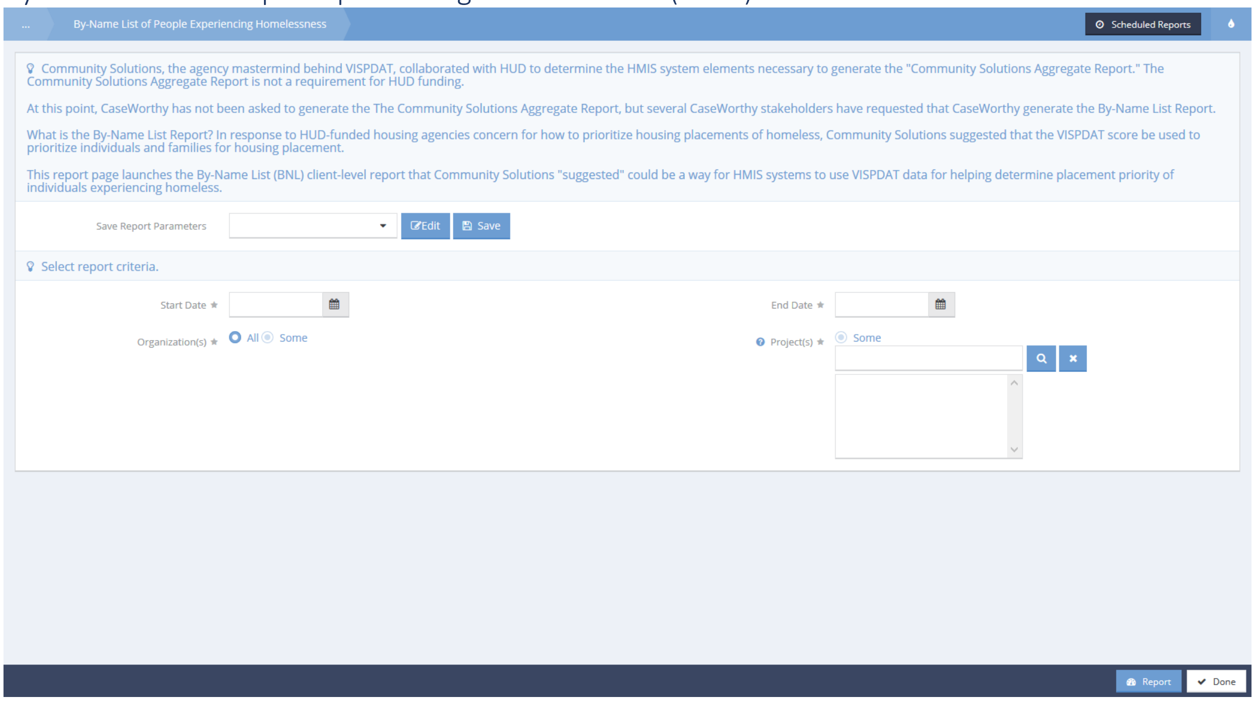
Navigation: Administration>Reporting>Compliance Reports



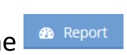
Select By-Name List from the VI SPDAT (Community Solutions) Analytics portion of the Compliance Reports dashboard.

The By-Name List of People Experiencing Homelessness form displays.

By-Name List of People Experiencing Homelessness (9112)



In response to HUD-funded housing agencies’ concern for how to prioritize housing placements of homeless, Community Solutions suggested that the VISPDAT score be used to prioritize individuals and families for housing placement. This report page launches the By-Name List (BNL) client-level report that Community Solutions "suggested" could be a way for HMIS systems to use VISPDAT data for helping determine placement priority of individuals experiencing homelessness.

Enter a Start and End Date, select all or some organizations and projects. Click the 

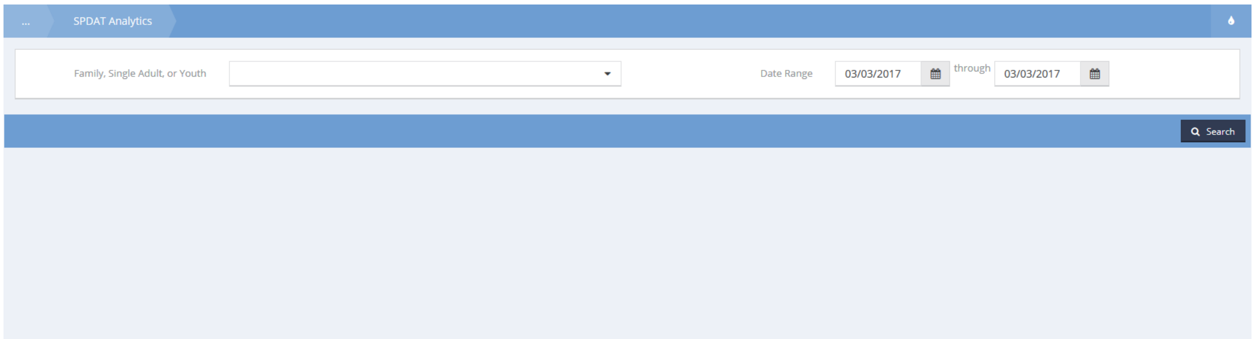
button to launch the report. The report displays in a new pop-up window.

SPDAT Enhancements for 2017

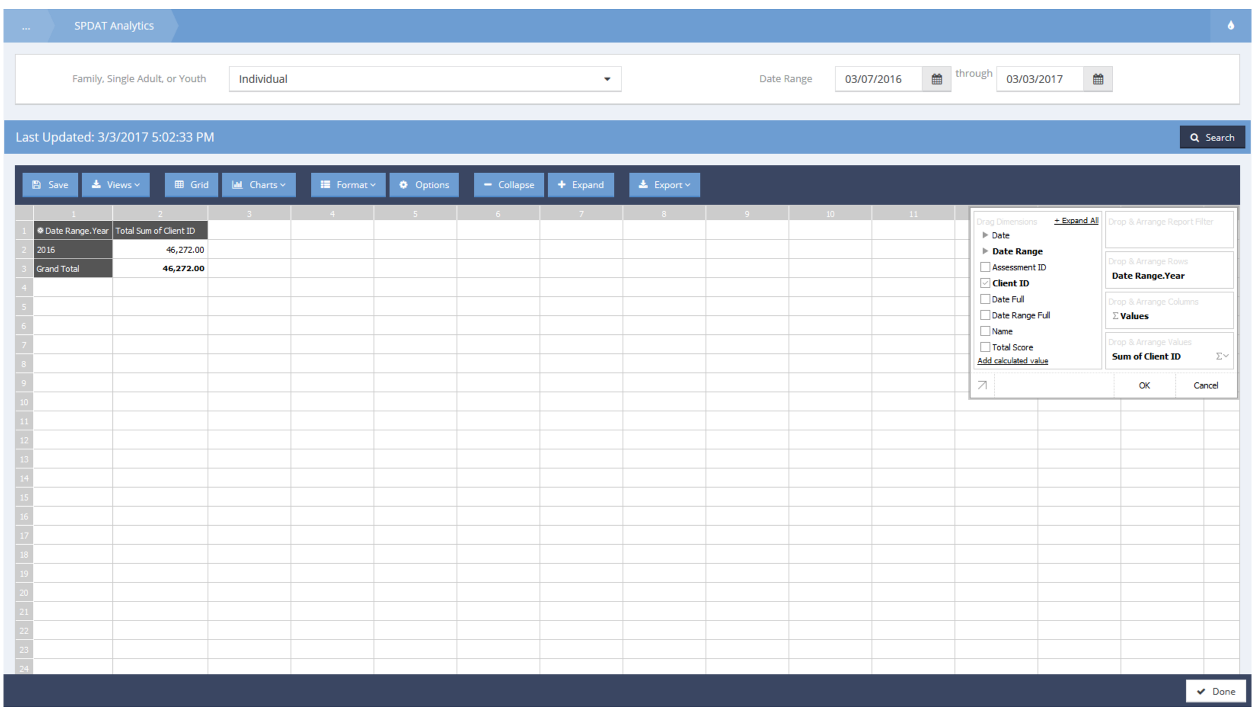
Objective: VI SPDAT Enhancements for 2017

Navigation: Administration>Reporting>Compliance Reports>SPDAT

The SPDAT Analytics form displays.



Select the desired SPDAT to view a report on: Individual, Family, or Youth and select a date range. Click the Search button to view results.

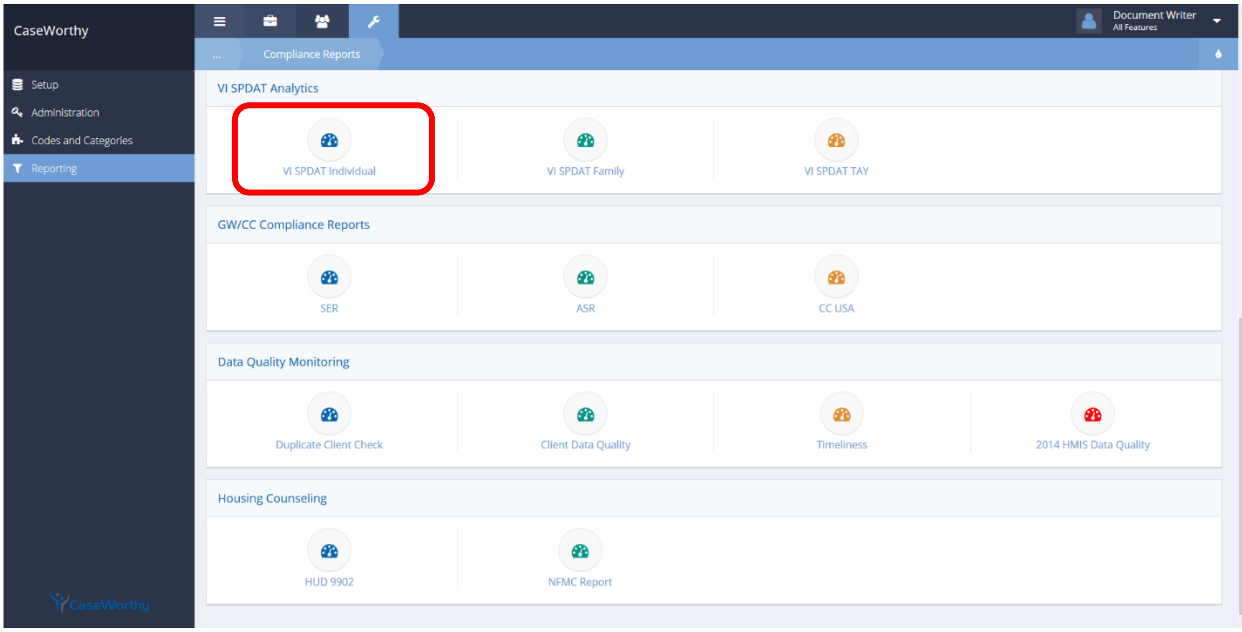


A pivot form displays with the desired information. Use the pivot functionality to view the results as desired.

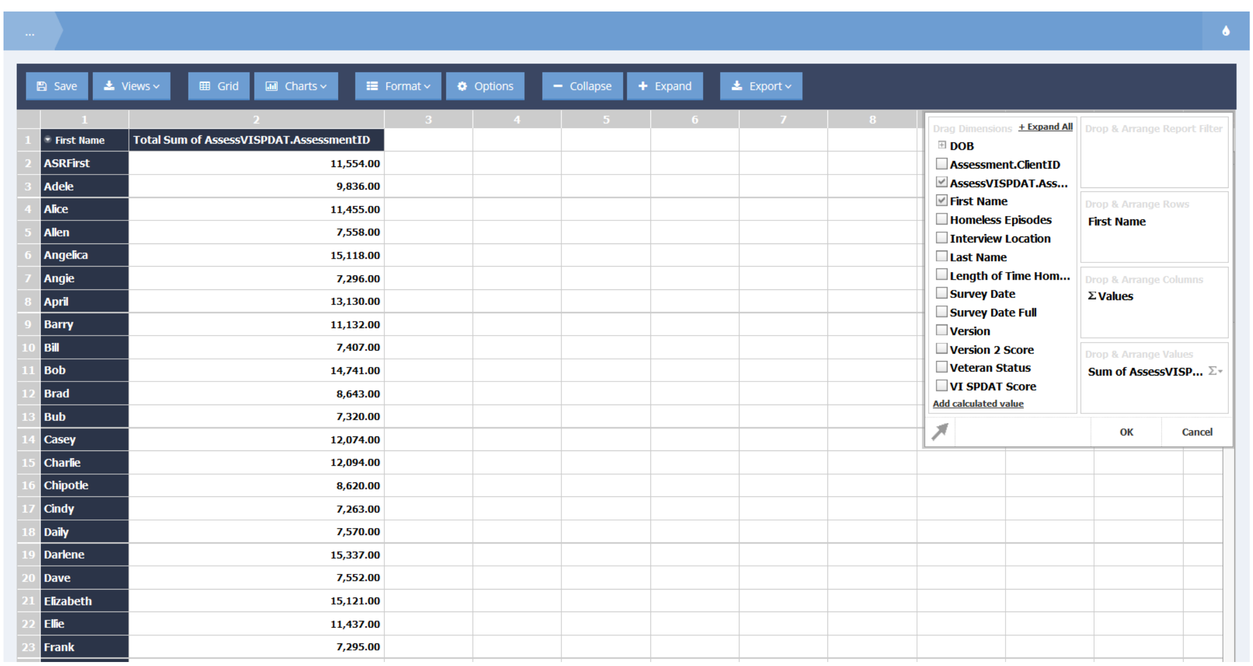
VI SPDAT Individual

Objective: Create and view VISPDAT reports in pivot table form.

Navigation: Administration>Reporting>Compliance Reports



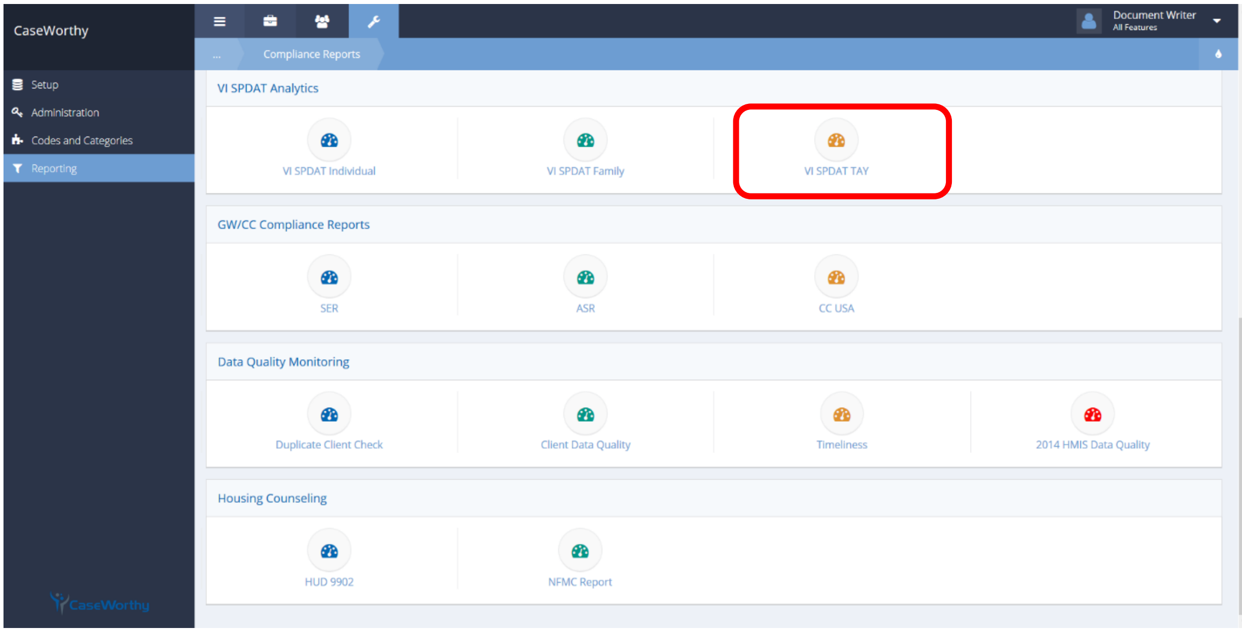
Select VI SPDAT Individual from the VI SPDAT Analytics portion of the Compliance Reports dashboard. The VI SPDAT Pivot form displays.



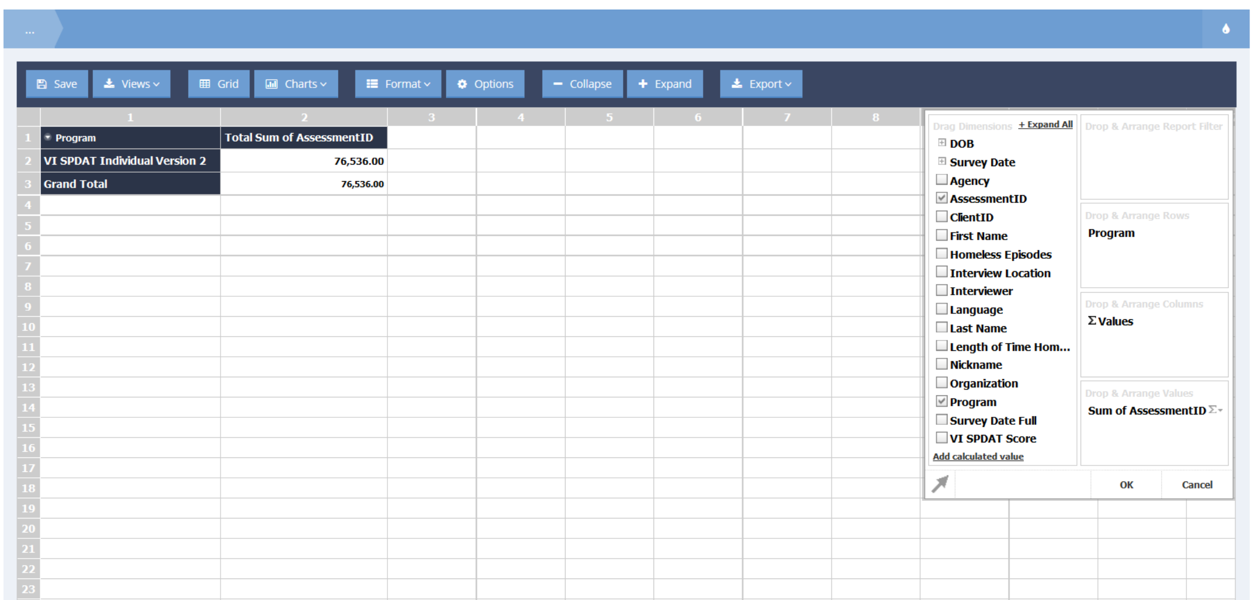
VI SPDAT TAY

Objective: Create and view VISPDAT TAY reports in pivot table form.

Navigation: Administration>Reporting>Compliance Reports



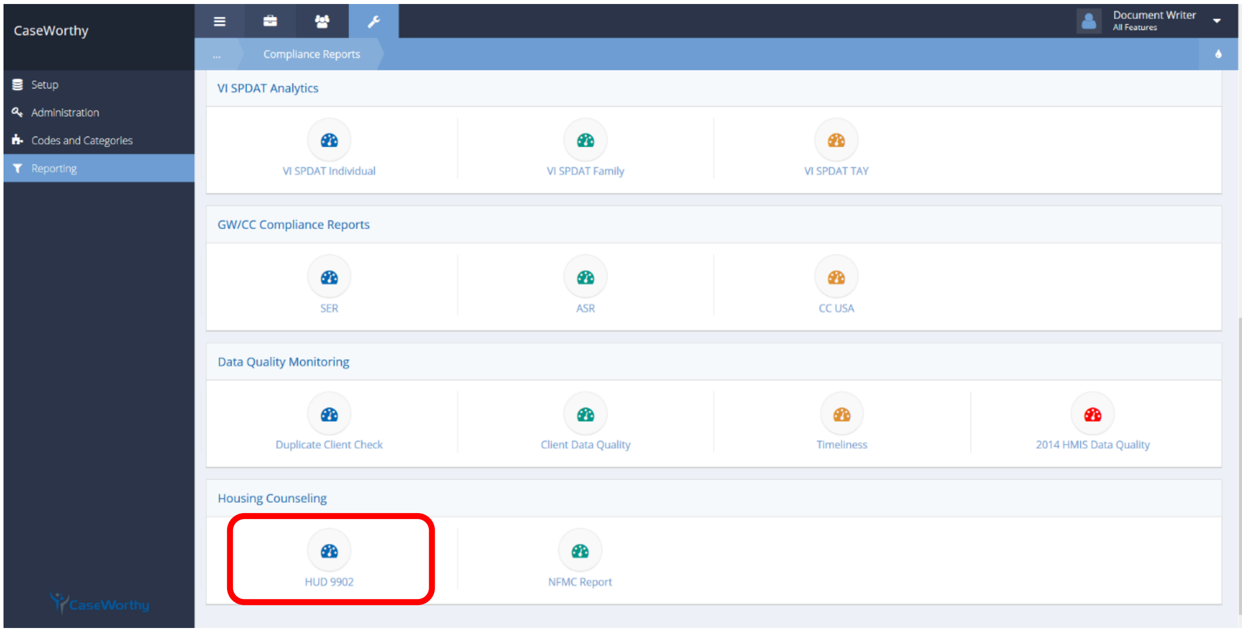
Select VI SPDAT TAY from the VI SPDAT Analytics portion of the Compliance Reports dashboard. The VI SPDAT TAY Pivot form displays.



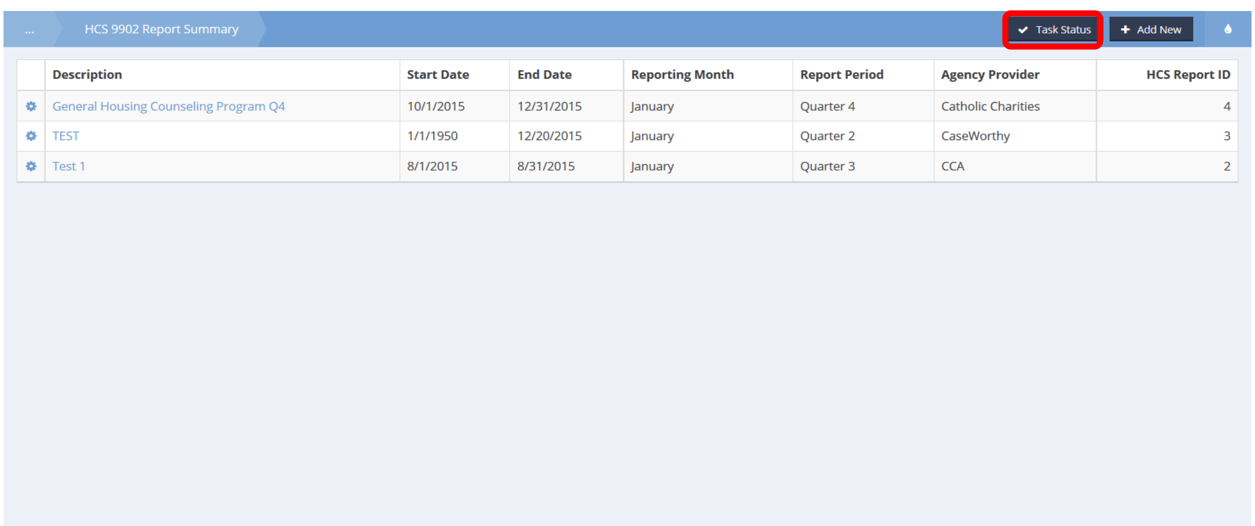
HUD 9902

Objective: Create HUD 9902 report for submission of services provided to home buyers to HUD.

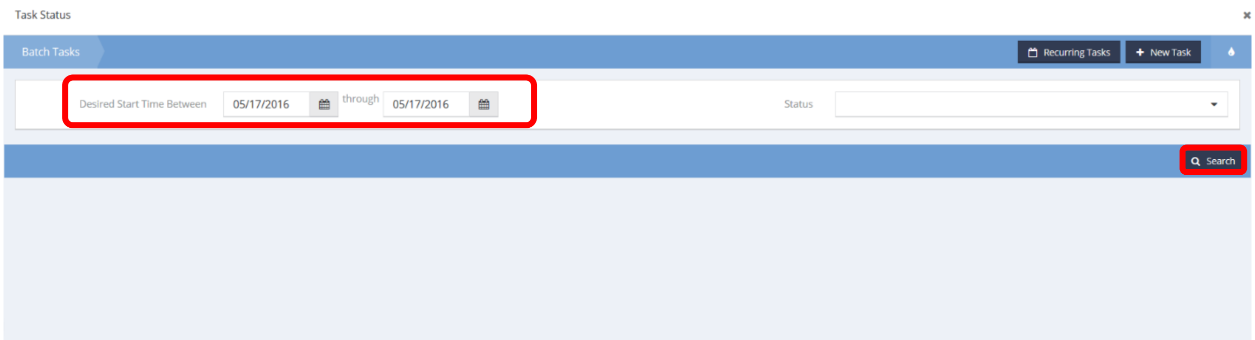
Navigation: Administration>Reporting>Compliance Reports



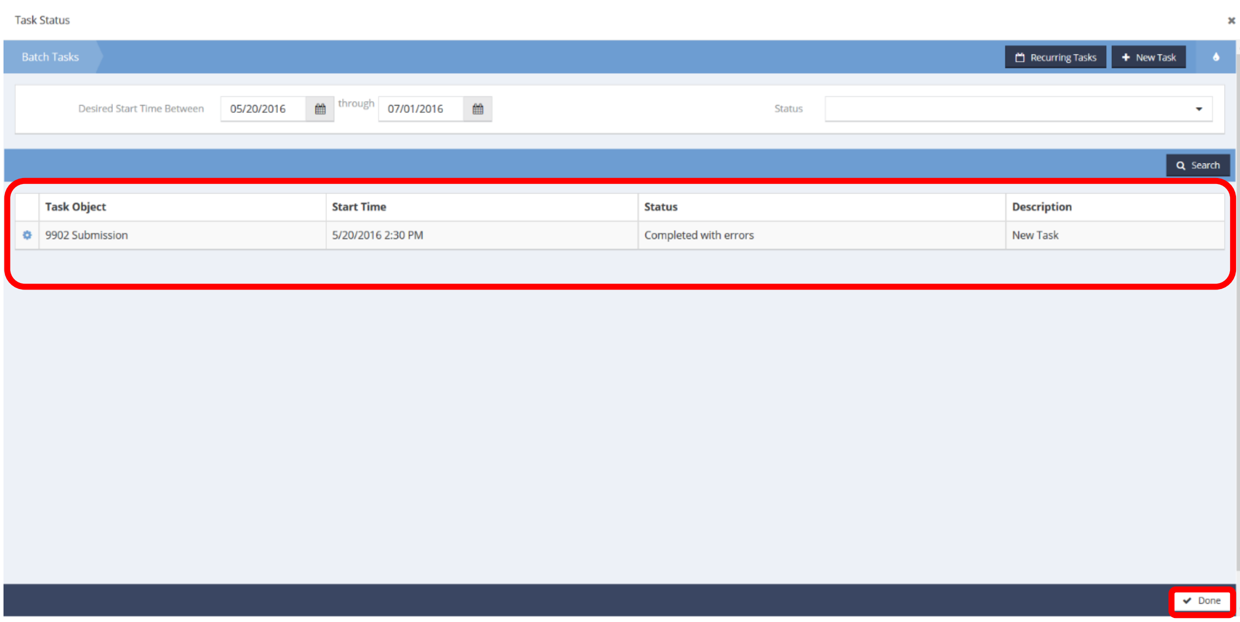
Select HUD 9902 from the Housing Counseling portion of the Compliance Reports dashboard. The HCS 9902 Report Summary displays.



Click the ✔ Task Status button to view task status.
The Batch Tasks form displays.



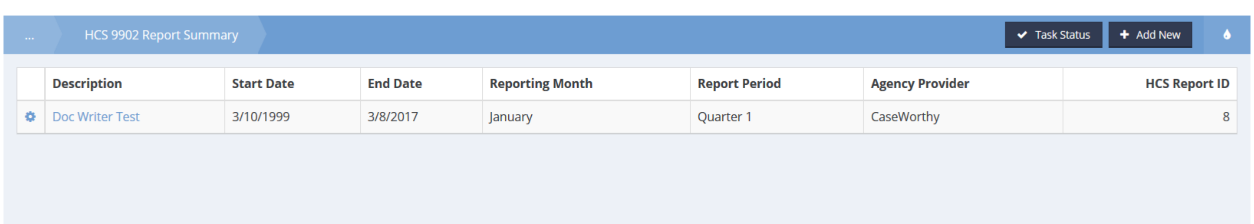
Enter a date range and choose a status from the drop-down menu to filter results. Click the Search button to populate results. To view recurring tasks, click the Recurring Tasks button. To add a new task, click the New Task button.



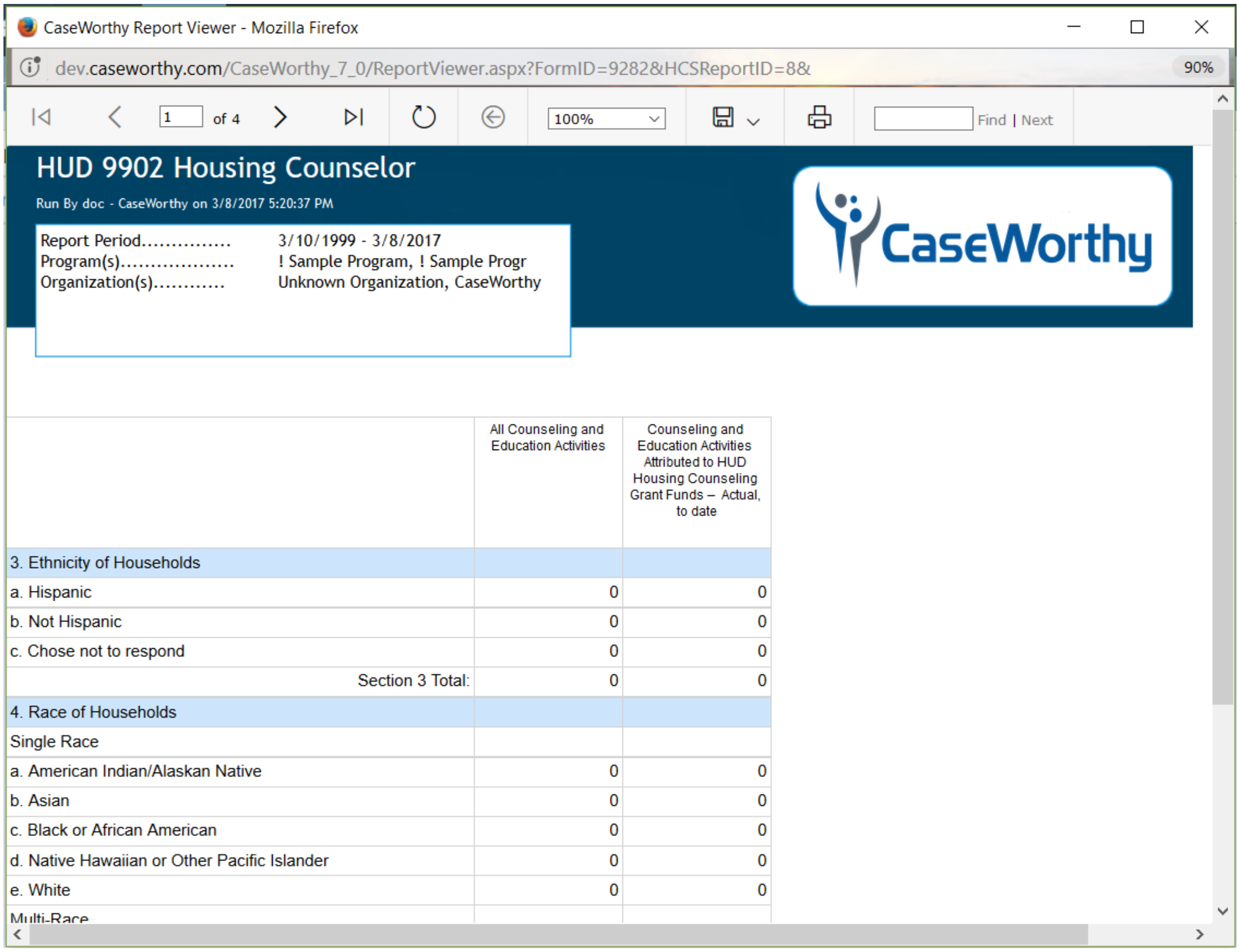
To view a task, click the action gear icon associated with the desired task and select View Task.

Click the Done button when finished.

View a previous HUD 9902 report from the HCS 9902 Report Summary form.



A list of previously created reports displays. Click the action gear icon associated with the desired report and select Form Report from the menu options. This option launches the report again, for viewing purposes. The HCS Form Report displays in a new pop-up window.



HUD 9902 Housing Counselor

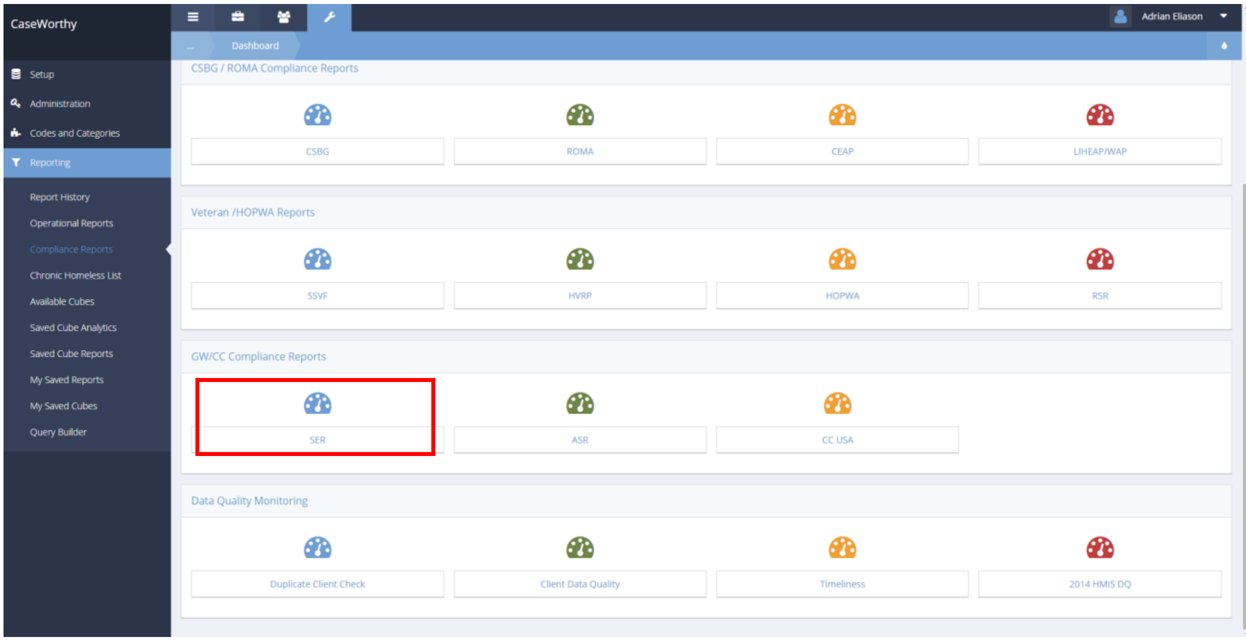
Run By doc - CaseWorthy on 3/8/2017 5:20:37 PM

Report Period............... 3/10/1999 - 3/8/2017
Program(s)................... ! Sample Program, ! Sample Progr
Organization(s)............ Unknown Organization, CaseWorthy

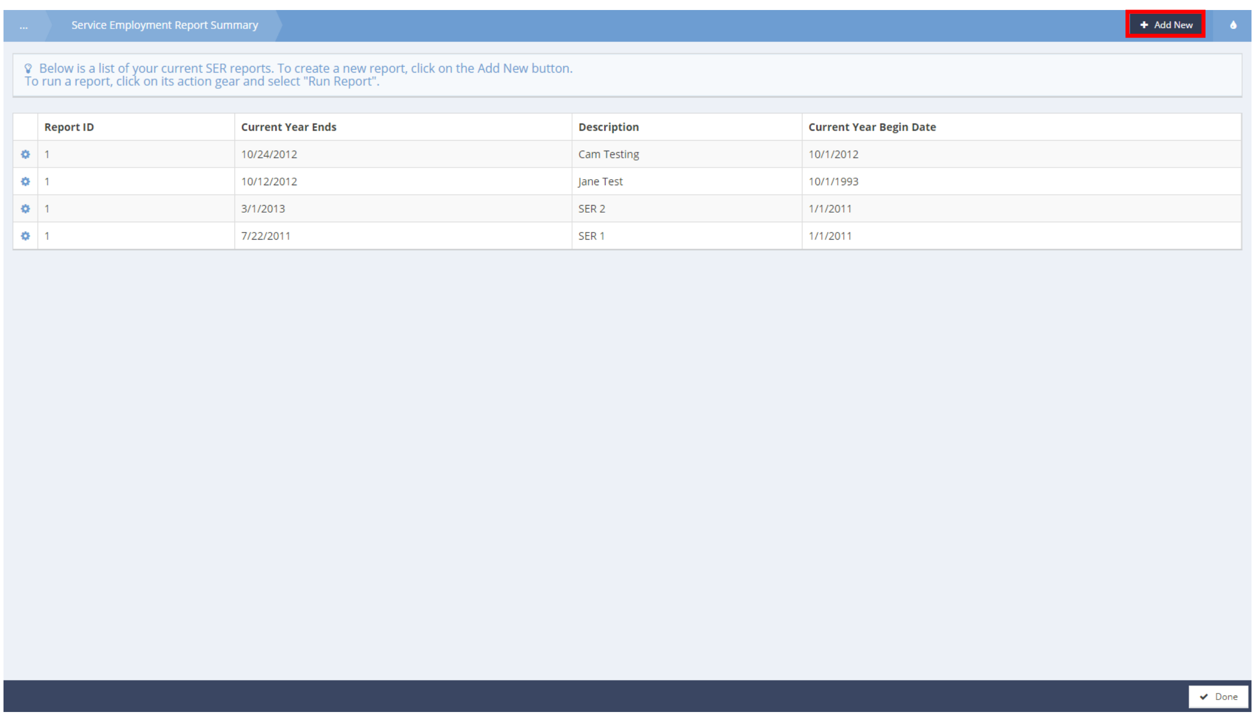
	All Counseling and Education Activities	Counseling and Education Activities Attributed to HUD Housing Counseling Grant Funds – Actual, to date
3. Ethnicity of Households		
a. Hispanic	0	0
b. Not Hispanic	0	0
c. Chose not to respond	0	0
Section 3 Total:	0	0
4. Race of Households		
Single Race		
a. American Indian/Alaskan Native	0	0
b. Asian	0	0
c. Black or African American	0	0
d. Native Hawaiian or Other Pacific Islander	0	0
e. White	0	0
Multi-Race		

SER

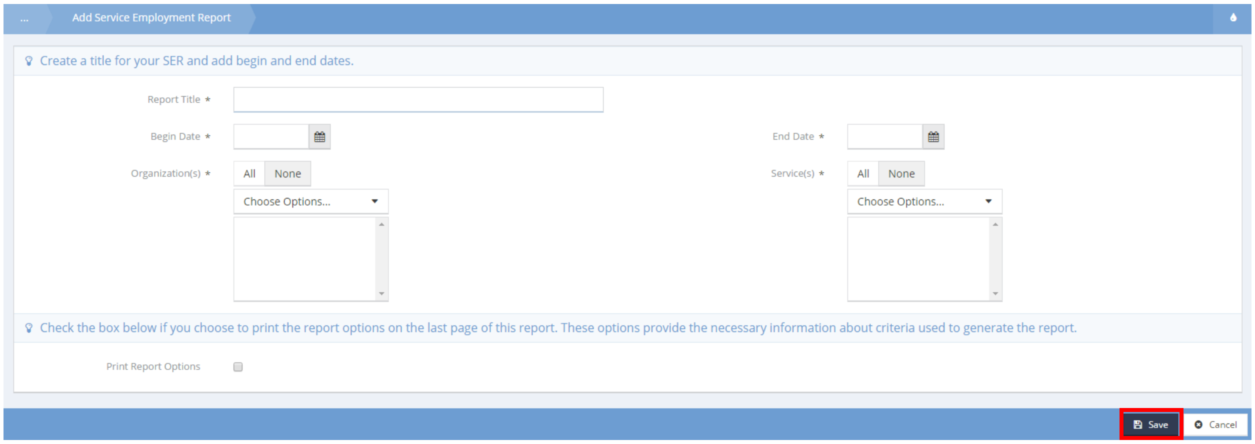
To run an SER report, click the SER icon.



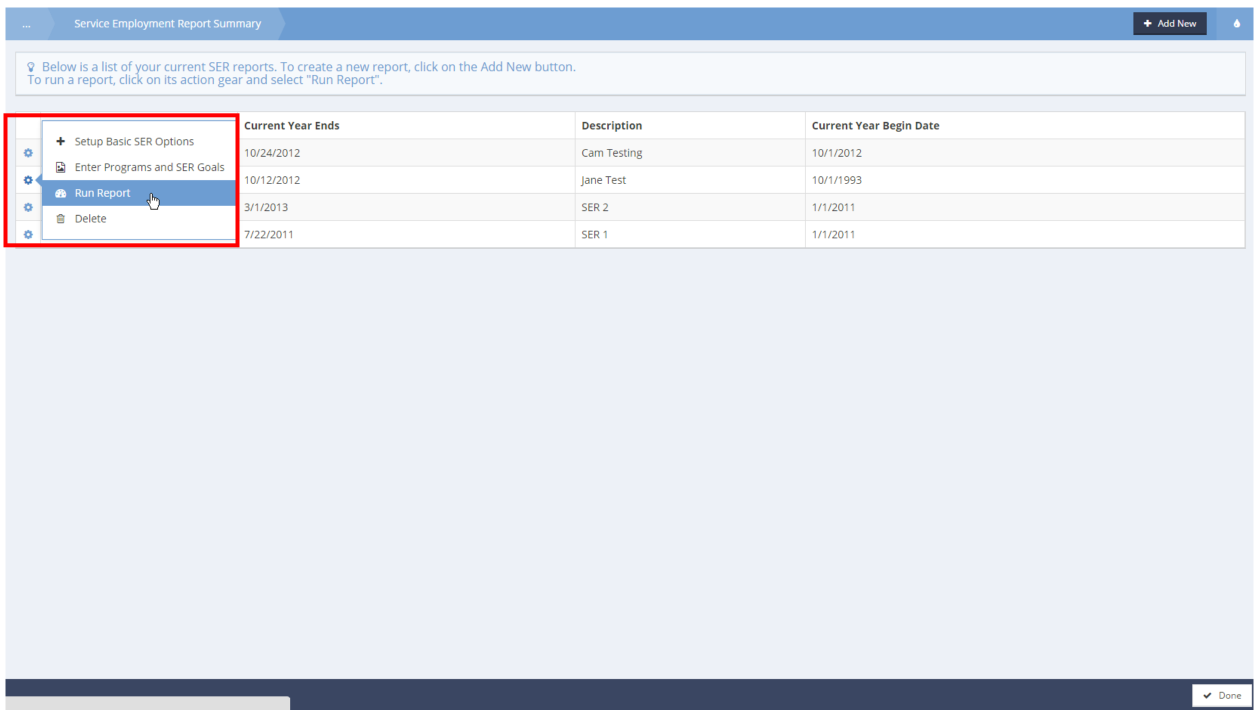
To create a new report, click the **+ Add New** button.



Enter a report title, begin date, and end date. Choose any organizations and services. Click **Save** when done. The report is added to the report summary.



Click the action gear next to a report and click Run Report.



The report displays in a new window.

Services and Employment Report

Run By aeliason - CaseWorthy on 12/22/2014 10:48:28 AM

Report Period.............. 10/1/2012 - 10/24/2012
Program.................... 1 English for Employment
Organization(s)............ Unknown Organization, CaseWorthy

A	B	C	D	E	F
Program(s)	YTD Services	Projected Services	Variance: B - C	Prior Year Services	Variance: B - E
1 English for Employment	2	500	-498	0	2
Aggregates	2	500	-498	0	2

A	B	C	D	E	F
Program(s)	YTD Clients Served	Projected Clients Served	Variance: B - C	Prior Year Clients	Variance: B - E
1 English for Employment	7	150	-143	0	7
Aggregates	7	150	-143	0	7

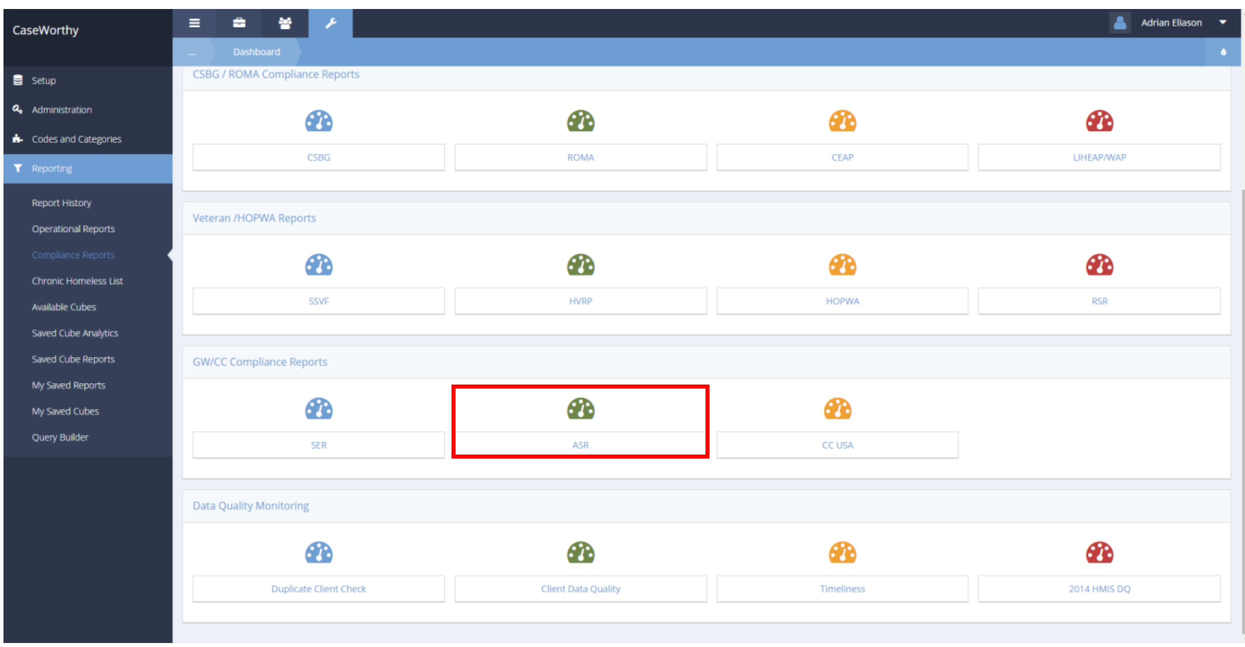
A	B	C	D	E	F
Program(s)	YTD Placements	Projected Placements	Variance: B - C	Prior Year Placements	Variance: B - E
1 English for Employment	0	50	-50	0	0
Aggregates	0	50	-50	0	0

A	B	C	D	E	F
Program(s)	YTD Average Wage	Projected Average Wage	Variance: B - C	Prior Year Average Wage	Variance: B - E
1 English for Employment	0.00	10.75	(10.75)	0.00	0.00
Aggregates	$0.00	$10.75	($10.75)	$0.00	$0.00

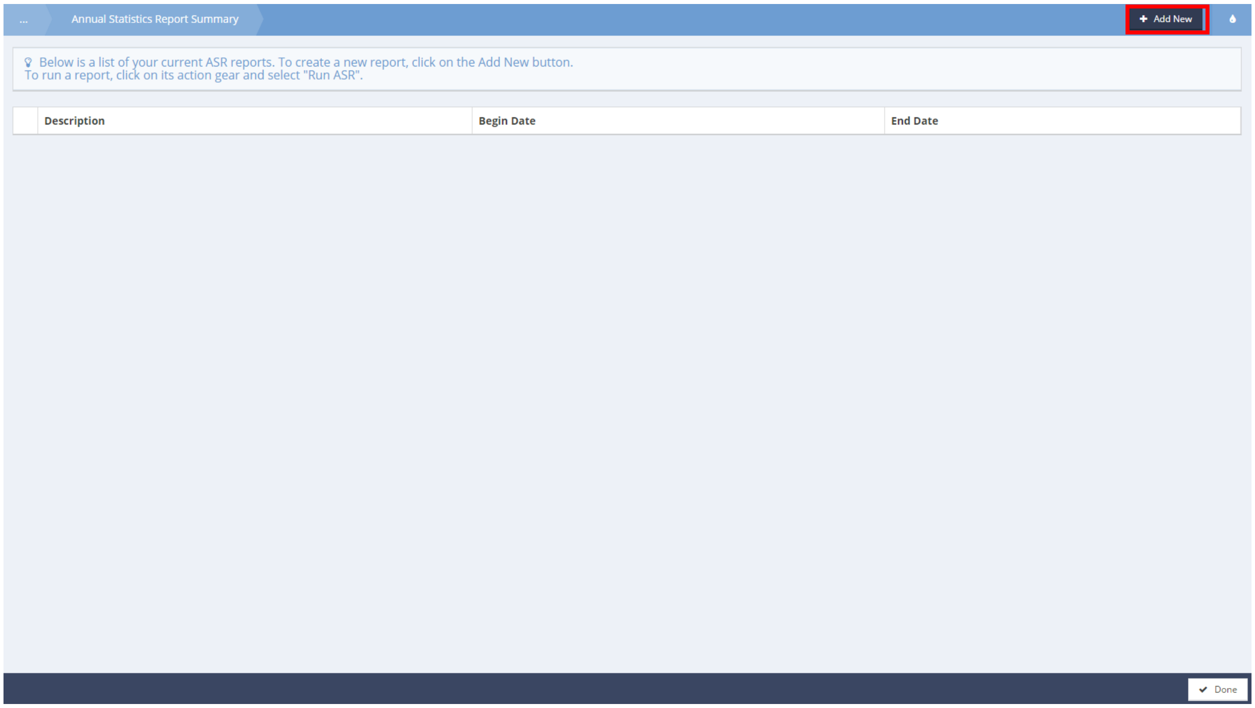
Services and Employment Report Page 1 of 1

ASR

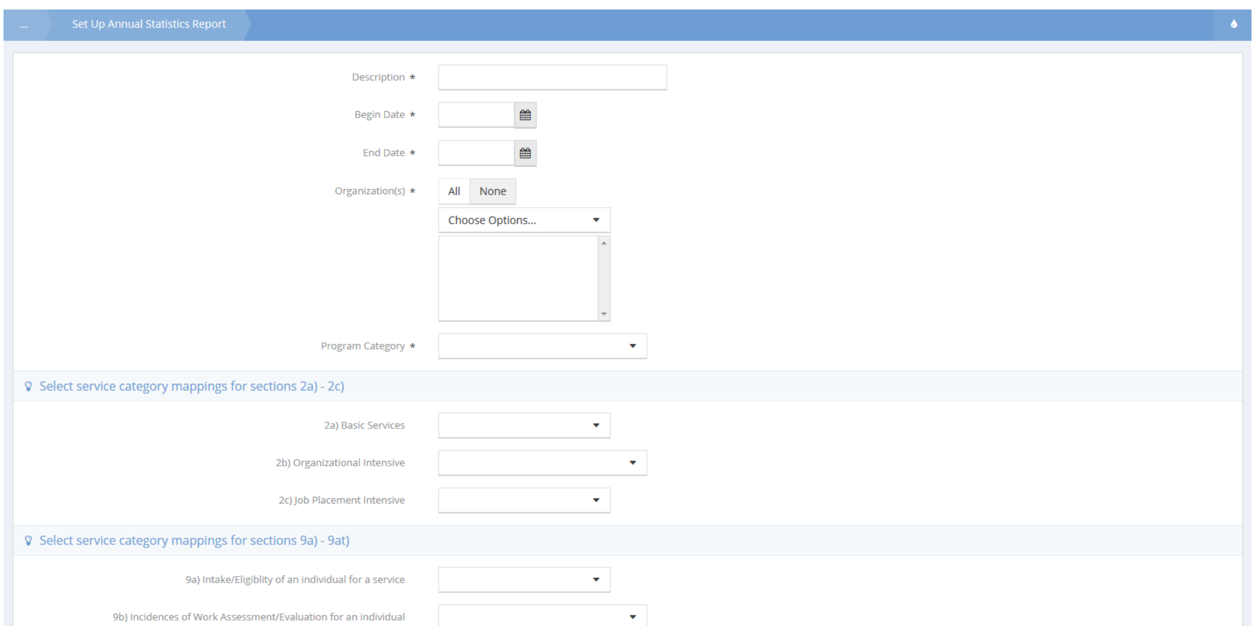
To run an ASR, click on the ASR icon on the Compliance Reports dashboard.

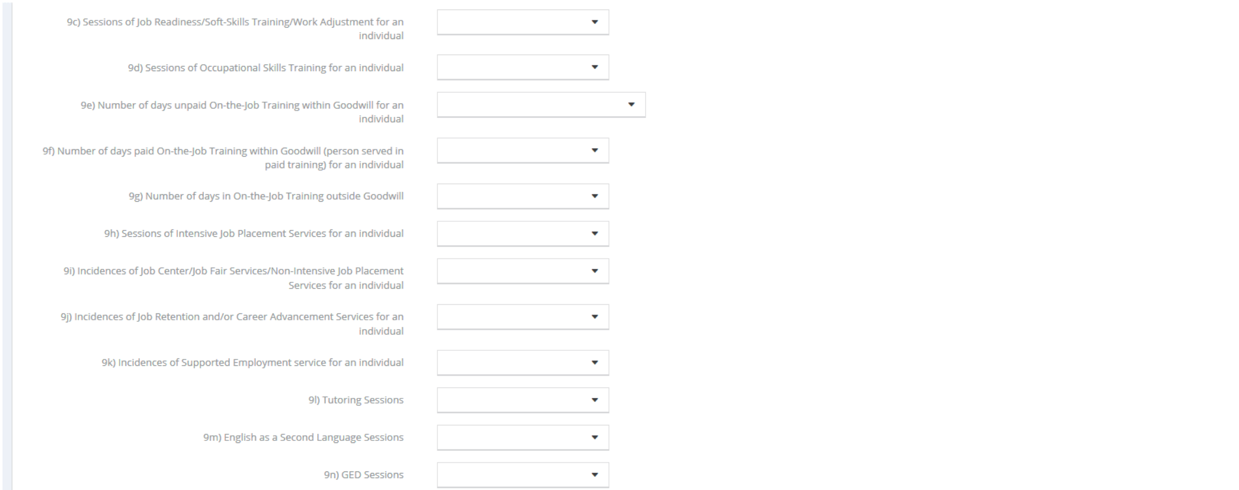


To create a new ASR report, click the + Add New button.



Enter a description, begin date, and end date. Choose any organizations and select a program category from the drop-down list. Map all appropriate categories. Click Save when finished.





9c) Sessions of Job Readiness/Soft-Skills Training/Work Adjustment for an individual

9d) Sessions of Occupational Skills Training for an individual

9e) Number of days unpaid On-the-Job Training within Goodwill for an individual

9f) Number of days paid On-the-Job Training within Goodwill (person served in paid training) for an individual

9g) Number of days in On-the-Job Training outside Goodwill

9h) Sessions of Intensive Job Placement Services for an individual

9i) Incidences of Job Center/Job Fair Services/Non-Intensive Job Placement Services for an individual

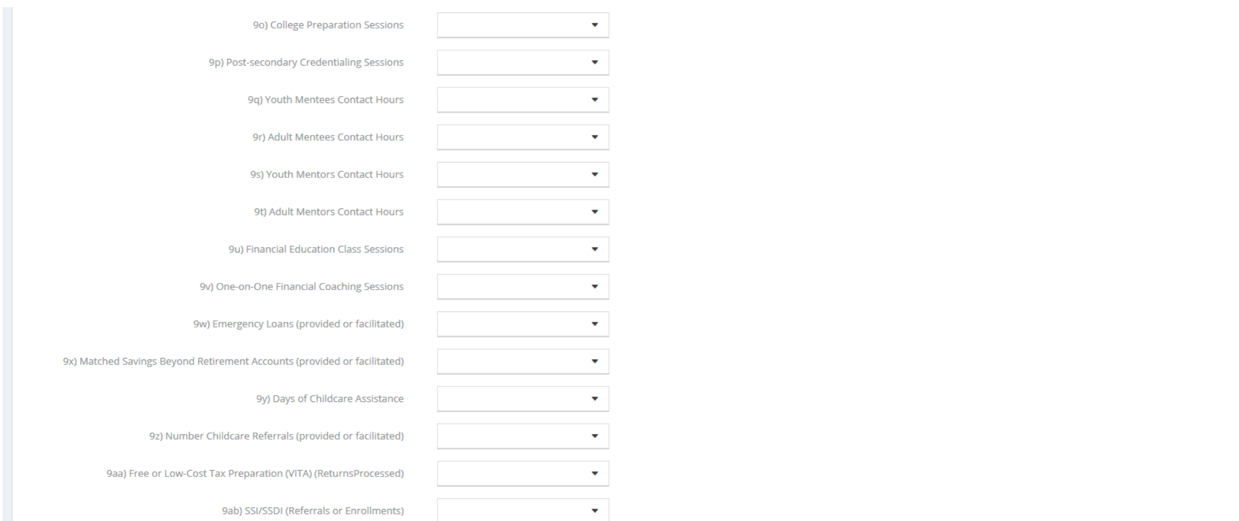
9j) Incidences of Job Retention and/or Career Advancement Services for an individual

9k) Incidences of Supported Employment service for an individual

9l) Tutoring Sessions

9m) English as a Second Language Sessions

9n) GED Sessions



9o) College Preparation Sessions

9p) Post-secondary Credentialing Sessions

9q) Youth Mentees Contact Hours

9r) Adult Mentees Contact Hours

9s) Youth Mentors Contact Hours

9t) Adult Mentors Contact Hours

9u) Financial Education Class Sessions

9v) One-on-One Financial Coaching Sessions

9w) Emergency Loans (provided or facilitated)

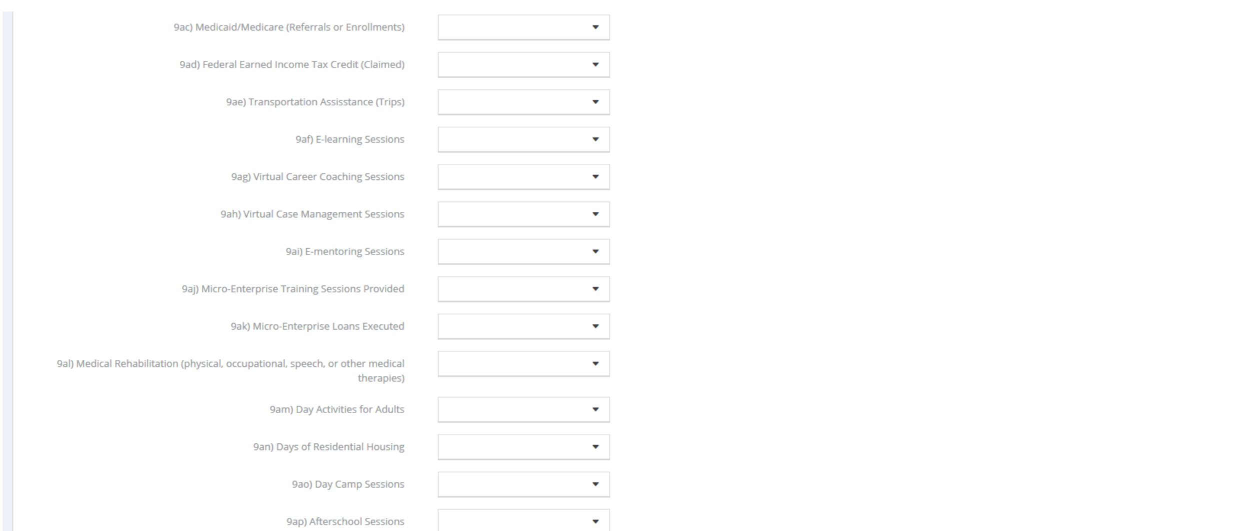
9x) Matched Savings Beyond Retirement Accounts (provided or facilitated)

9y) Days of Childcare Assistance

9z) Number Childcare Referrals (provided or facilitated)

9aa) Free or Low-Cost Tax Preparation (VITA) (ReturnsProcessed)

9ab) SSI/SSDI (Referrals or Enrollments)



9ac) Medicaid/Medicare (Referrals or Enrollments)

9ad) Federal Earned Income Tax Credit (Claimed)

9ae) Transportation Assisstance (Trips)

9af) E-learning Sessions

9ag) Virtual Career Coaching Sessions

9ah) Virtual Case Management Sessions

9ai) E-mentoring Sessions

9aj) Micro-Enterprise Training Sessions Provided

9ak) Micro-Enterprise Loans Executed

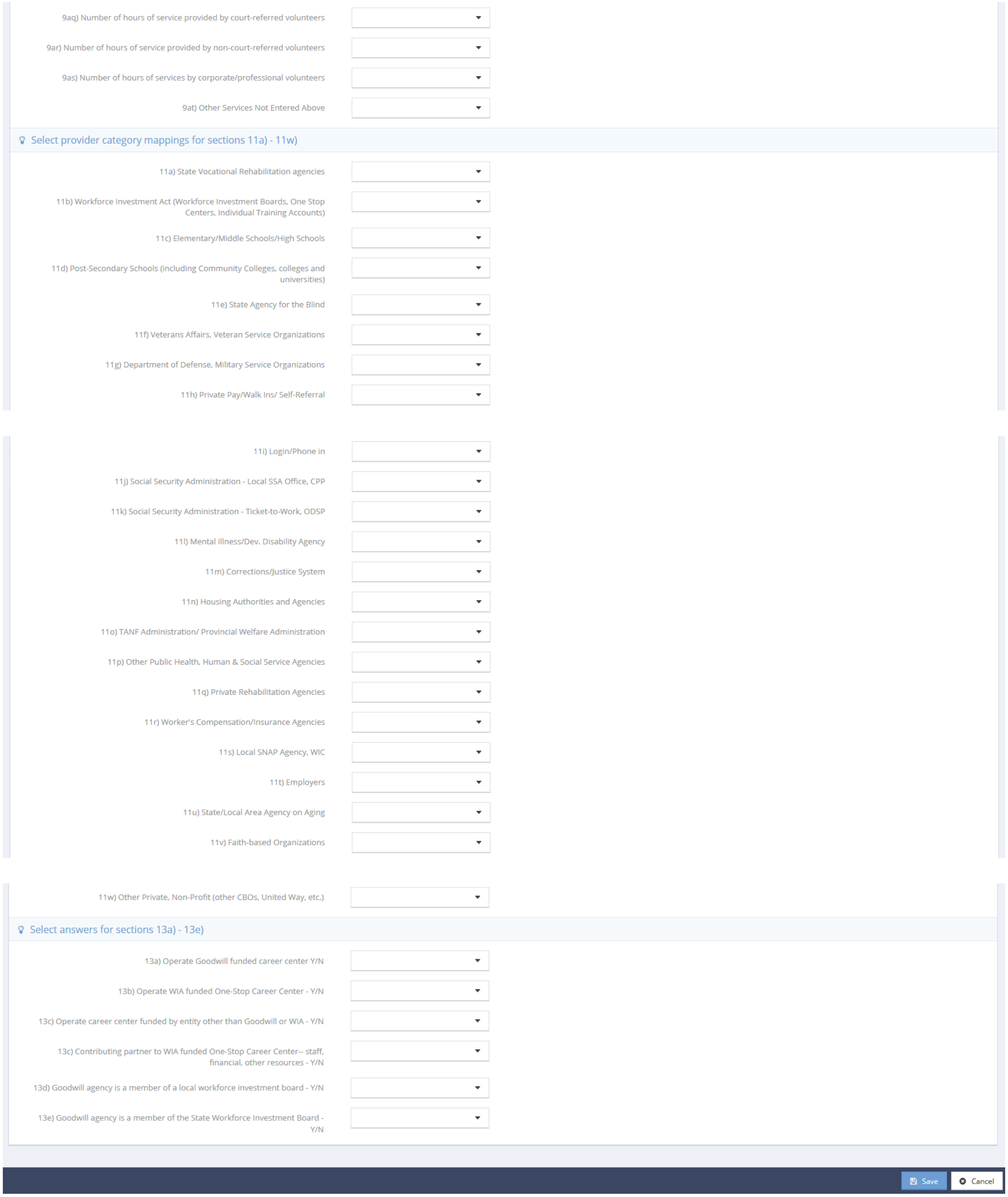
9al) Medical Rehabilitation (physical, occupational, speech, or other medical therapies)

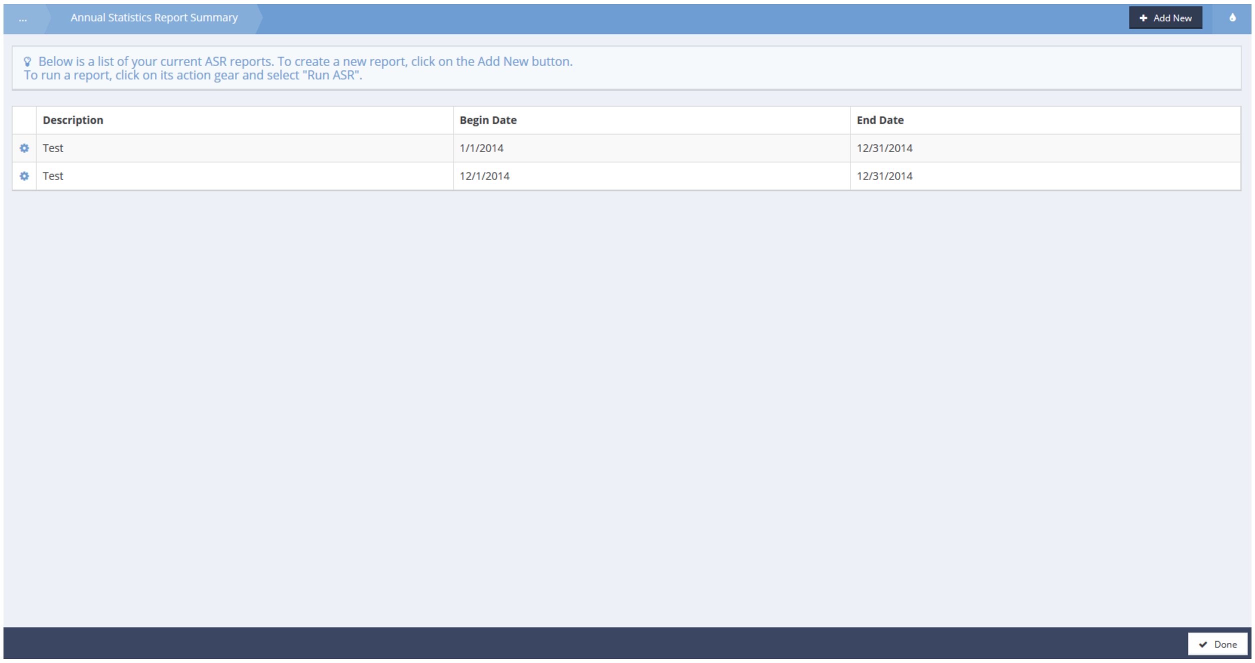
9am) Day Activities for Adults

9an) Days of Residential Housing

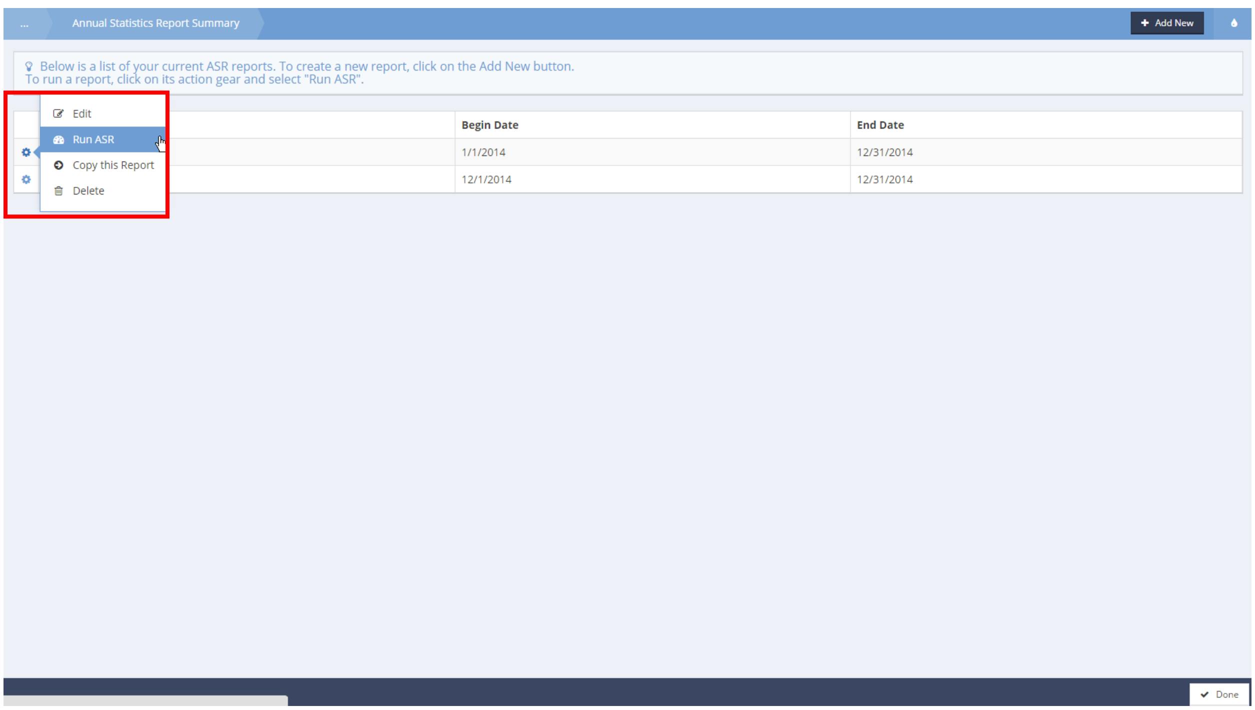
9ao) Day Camp Sessions

9ap) Afterschool Sessions

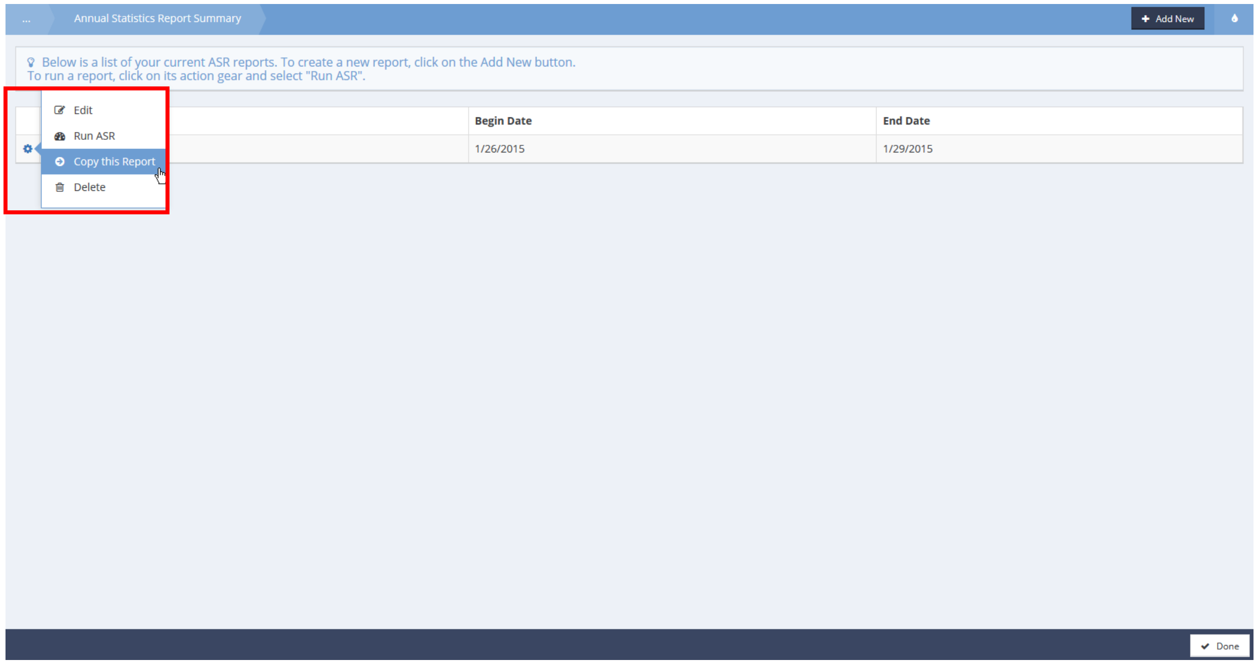

9aq) Number of hours of service provided by court-referred volunteers
9ar) Number of hours of service provided by non-court-referred volunteers
9as) Number of hours of services by corporate/professional volunteers
9at) Other Services Not Entered Above
Select provider category mappings for sections 11a) - 11w)
11a) State Vocational Rehabilitation agencies
11b) Workforce Investment Act (Workforce Investment Boards, One Stop Centers, Individual Training Accounts)
11c) Elementary/Middle Schools/High Schools
11d) Post-Secondary Schools (including Community Colleges, colleges and universities)
11e) State Agency for the Blind
11f) Veterans Affairs, Veteran Service Organizations
11g) Department of Defense, Military Service Organizations
11h) Private Pay/Walk Ins/ Self-Referral
11i) Login/Phone in
11j) Social Security Administration - Local SSA Office, CPP
11k) Social Security Administration - Ticket-to-Work, ODSP
11l) Mental Illness/Dev. Disability Agency
11m) Corrections/Justice System
11n) Housing Authorities and Agencies
11o) TANF Administration/ Provincial Welfare Administration
11p) Other Public Health, Human & Social Service Agencies
11q) Private Rehabilitation Agencies
11r) Worker's Compensation/Insurance Agencies
11s) Local SNAP Agency, WIC
11t) Employers
11u) State/Local Area Agency on Aging
11v) Faith-based Organizations
11w) Other Private, Non-Profit (other CBOs, United Way, etc.)
Select answers for sections 13a) - 13e)
13a) Operate Goodwill funded career center Y/N
13b) Operate WIA funded One-Stop Career Center - Y/N
13c) Operate career center funded by entity other than Goodwill or WIA - Y/N
13c) Contributing partner to WIA funded One-Stop Career Center-- staff, financial, other resources - Y/N
13d) Goodwill agency is a member of a local workforce investment board - Y/N
13e) Goodwill agency is a member of the State Workforce Investment Board - Y/N
Save
Cancel



To view an ASR, click the action gear and click Run ASR.

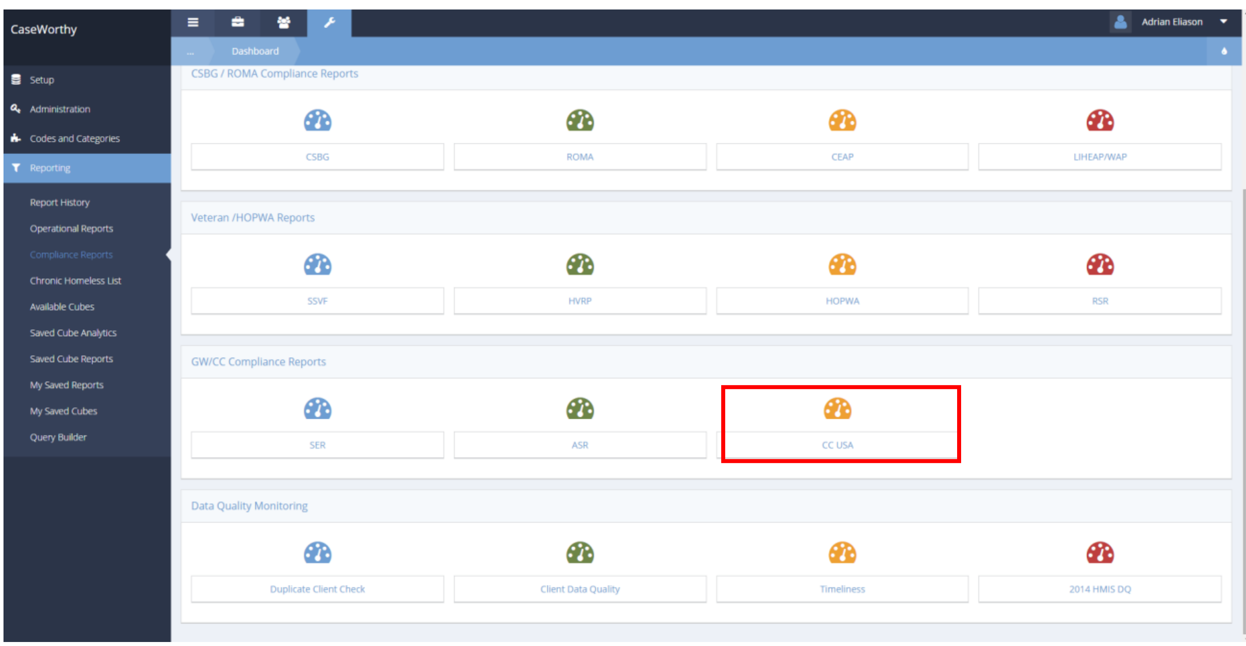


To copy an ASR report, click the action gear and click Copy this Report. This function is very useful to save time after the first initial report; simply make a copy and adjust anything needed. This way the ASR report does not need to be set up from scratch every year.

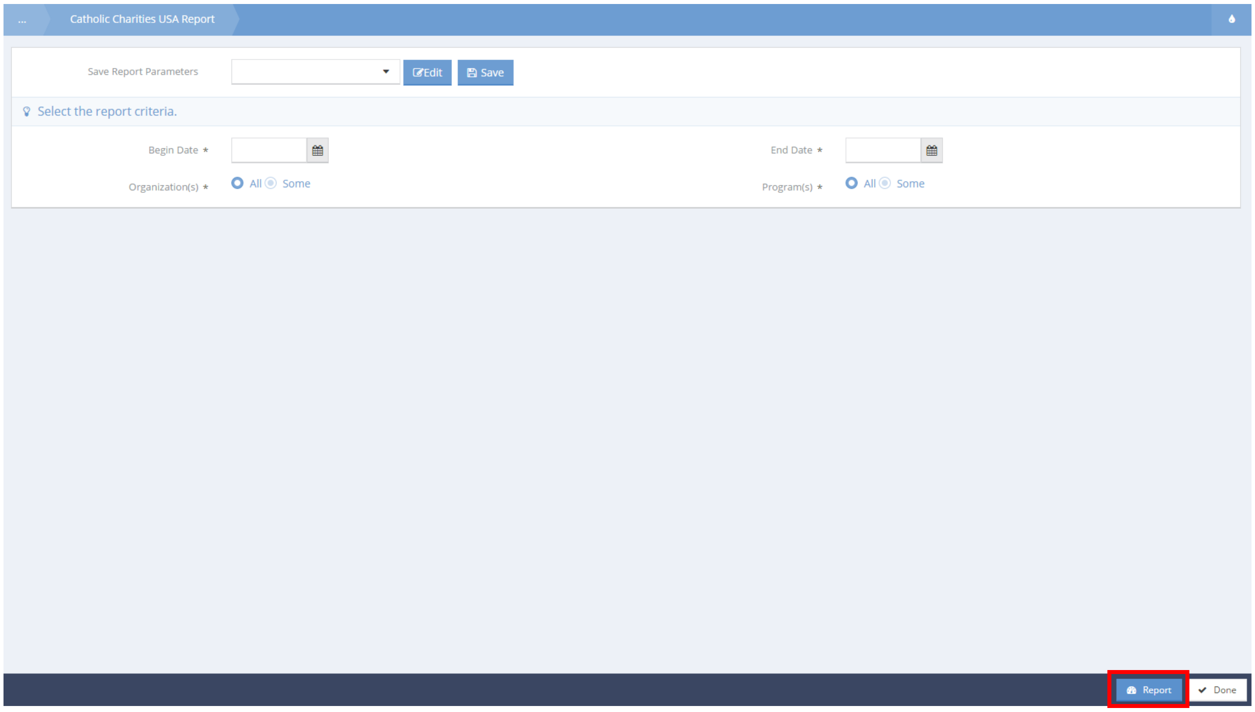


CC USA

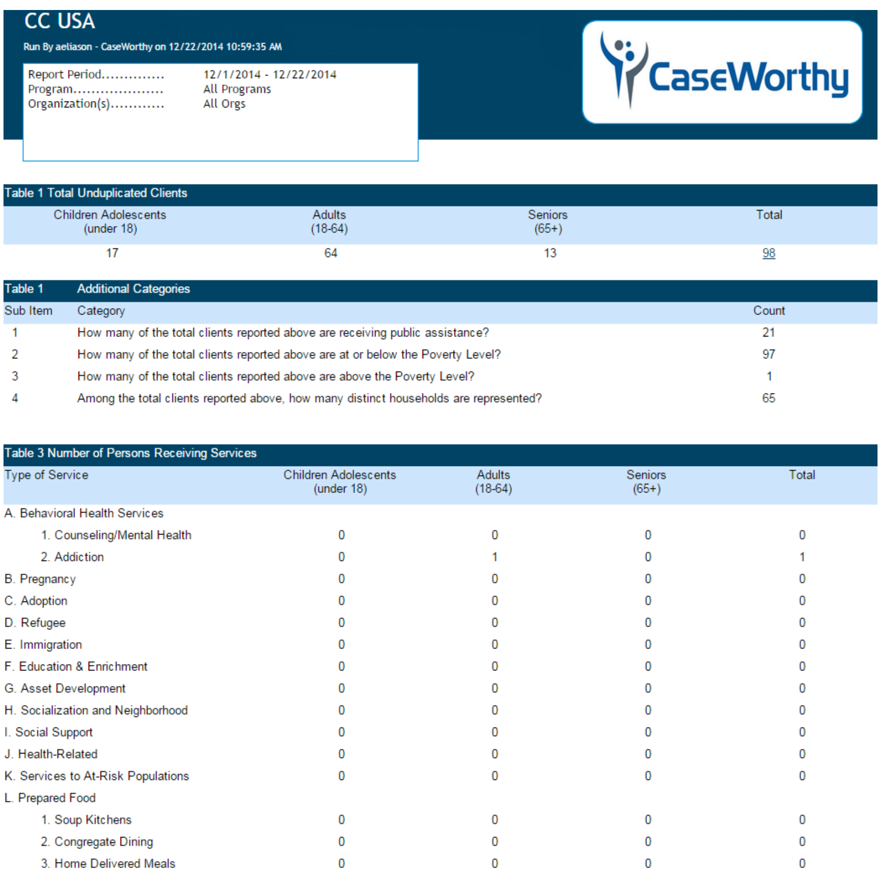
To run a CC USA report, click the CC USA icon.



Enter a Begin Date and an End Date. Choose any organizations and programs. Click Report when finished.



The report displays in a new window.



CC USA

Run By aeliason - CaseWorthy on 12/22/2014 10:59:35 AM

Report Period............. 12/1/2014 - 12/22/2014
Program.................... All Programs
Organization(s)............ All Orgs

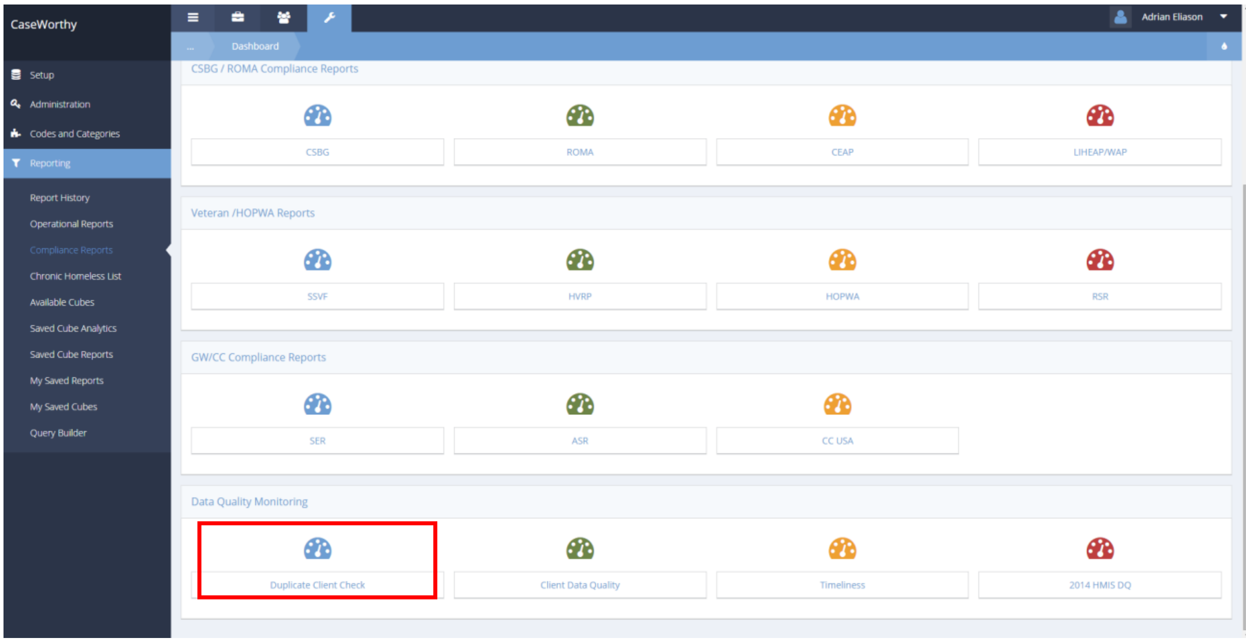
Table 1 Total Unduplicated Clients			
Children Adolescents (under 18)	Adults (18-64)	Seniors (65+)	Total
17	64	13	98

Table 1	Additional Categories	
Sub Item	Category	Count
1	How many of the total clients reported above are receiving public assistance?	21
2	How many of the total clients reported above are at or below the Poverty Level?	97
3	How many of the total clients reported above are above the Poverty Level?	1
4	Among the total clients reported above, how many distinct households are represented?	65

Table 3 Number of Persons Receiving Services				
Type of Service	Children Adolescents (under 18)	Adults (18-64)	Seniors (65+)	Total
A. Behavioral Health Services				
1. Counseling/Mental Health	0	0	0	0
2. Addiction	0	1	0	1
B. Pregnancy	0	0	0	0
C. Adoption	0	0	0	0
D. Refugee	0	0	0	0
E. Immigration	0	0	0	0
F. Education & Enrichment	0	0	0	0
G. Asset Development	0	0	0	0
H. Socialization and Neighborhood	0	0	0	0
I. Social Support	0	0	0	0
J. Health-Related	0	0	0	0
K. Services to At-Risk Populations	0	0	0	0
L. Prepared Food				
1. Soup Kitchens	0	0	0	0
2. Congregate Dining	0	0	0	0
3. Home Delivered Meals	0	0	0	0

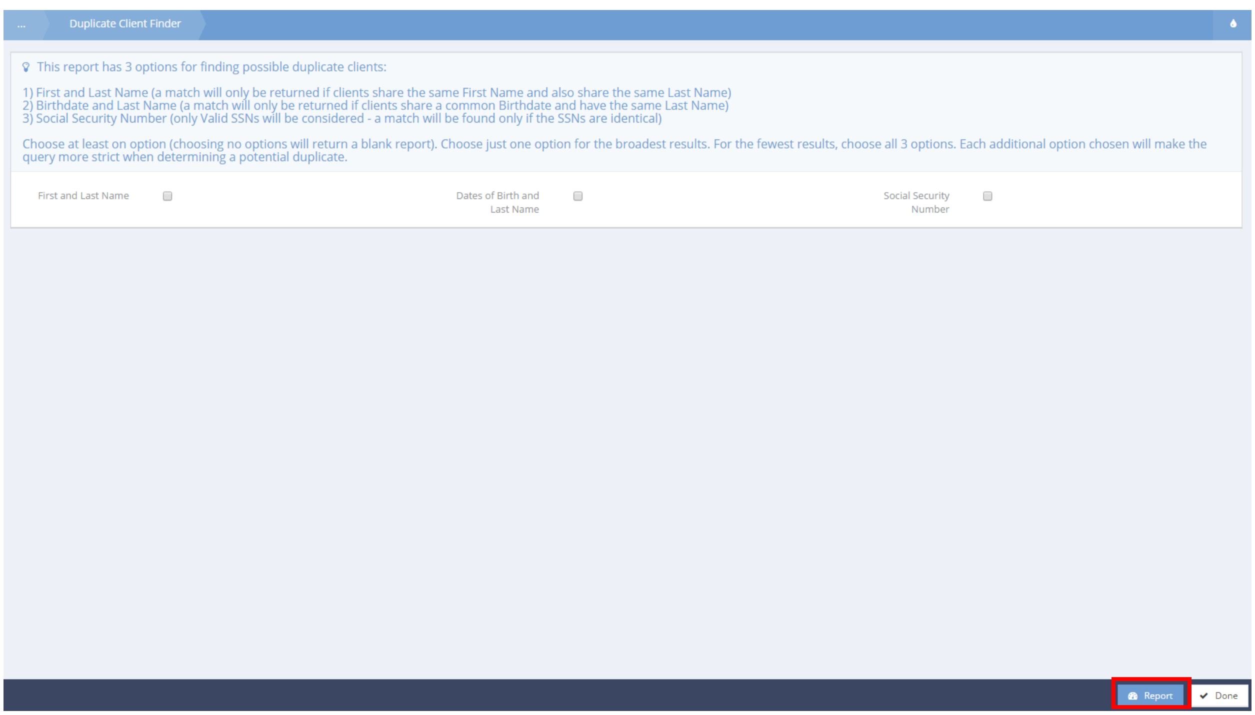
Duplicate Client Check

To run a Duplicate Client Check, click the Duplicate Client Check icon.



Click the checkbox for First and Last Name, Dates or Birth and Last Name, or Social Security Number. Click 

when finished.



The report displays in a new window.

Duplicate Client Discovery Report

Run By aeliason - CaseWorthy on 12/22/2014 11:02:57 AM

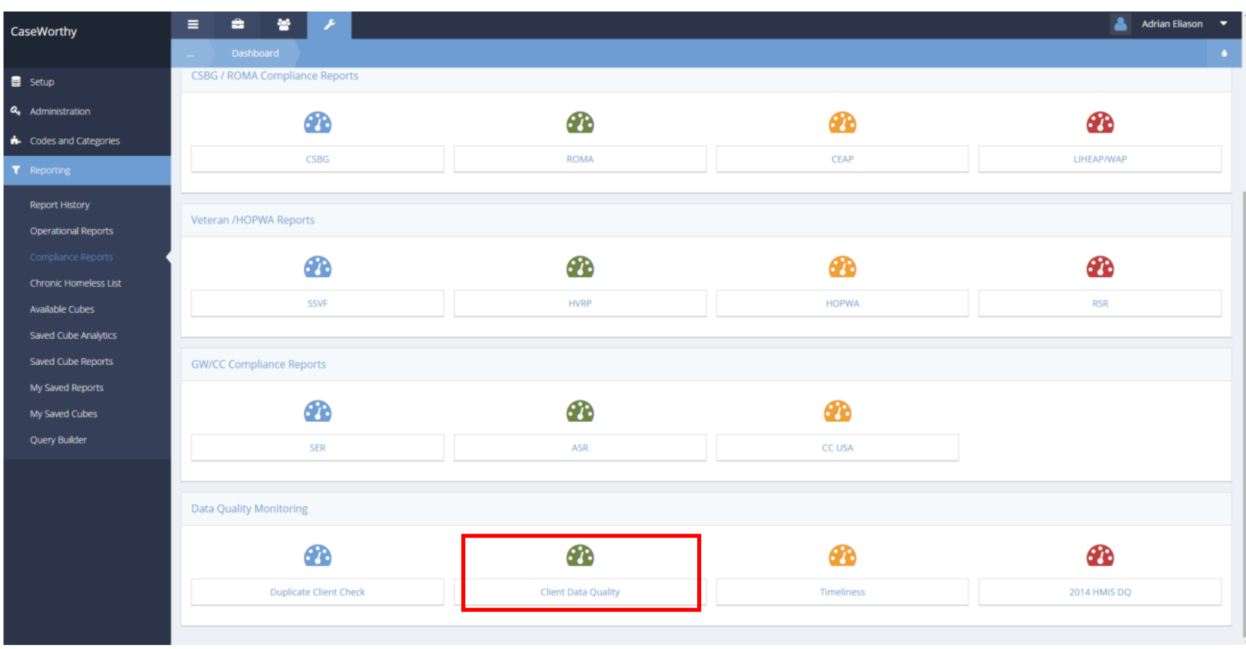
Match on:
First and Last Name ...... Yes
SSN .... No
Birthdate / Last Name ... No

Client Information					Possibly Duplicate Client Information				
Client ID	First Name	Last Name	Birth Date	SSN	Client ID	First Name	Last Name	Birth Date	SSN
6657	Rachel	Allen	02/25/1975	135-46-5432	7970	Rachel	Allen	01/01/2013	
7970	Rachel	Allen	01/01/2013		6657	Rachel	Allen	02/25/1975	135-46-5432
8022	Jennifer	Anderson	10/01/1987		3909	Jennifer	Anderson	08/19/2006	894-98-4989
3909	Jennifer	Anderson	08/19/2006	894-98-4989	8022	Jennifer	Anderson	10/01/1987	
2474	Baby3	Arden	06/01/2011		3792	Baby3	Arden	04/30/2013	159-15-9159
3792	Baby3	Arden	04/30/2013	159-15-9159	2474	Baby3	Arden	06/01/2011	
7981	Cam	Arden	05/05/2009	222-22-2222	7982	Cam	Arden	10/01/2010	454-65-4654
7982	Cam	Arden	10/01/2010	454-65-4654	7981	Cam	Arden	05/05/2009	222-22-2222
3917	Emmy	Arden	05/05/1994		3519	Emmy	Arden	01/01/2013	XXX-XX-5555
3519	Emmy	Arden	01/01/2013	XXX-XX-5555	3917	Emmy	Arden	05/05/1994	
2317	Yogi	Bear	03/04/1976		8025	Yogi	Bear	08/01/1994	
8025	Yogi	Bear	08/01/1994		2317	Yogi	Bear	03/04/1976	
9768	Steven Jr.	Bosell	02/22/1990	122-34-5678	9772	Steven Jr.	Bosell	05/22/2000	111-11-1111
9768	Steven Jr.	Bosell	02/22/1990	122-34-5678	9770	Steven Jr.	Bosell	02/22/2000	122-34-5678
9770	Steven Jr.	Bosell	02/22/2000	122-34-5678	9772	Steven Jr.	Bosell	05/22/2000	111-11-1111
9770	Steven Jr.	Bosell	02/22/2000	122-34-5678	9768	Steven Jr.	Bosell	02/22/1990	122-34-5678
9772	Steven Jr.	Bosell	05/22/2000	111-11-1111	9768	Steven Jr.	Bosell	02/22/1990	122-34-5678
9772	Steven Jr.	Bosell	05/22/2000	111-11-1111	9770	Steven Jr.	Bosell	02/22/2000	122-34-5678
2374	Charlie	Brown	04/05/1979		2457	Charlie	Brown	01/01/1980	123-42-3740
2457	Charlie	Brown	01/01/1980	123-42-3740	2374	Charlie	Brown	04/05/1979	
6820	Louis	CK	01/05/1962		6692	Louis	CK	01/01/1990	
6692	Louis	CK	01/01/1990		6820	Louis	CK	01/05/1962	
8074	Test	Client	08/13/1981	111-11-1111	8075	Test	Client	08/13/1981	111-11-1111

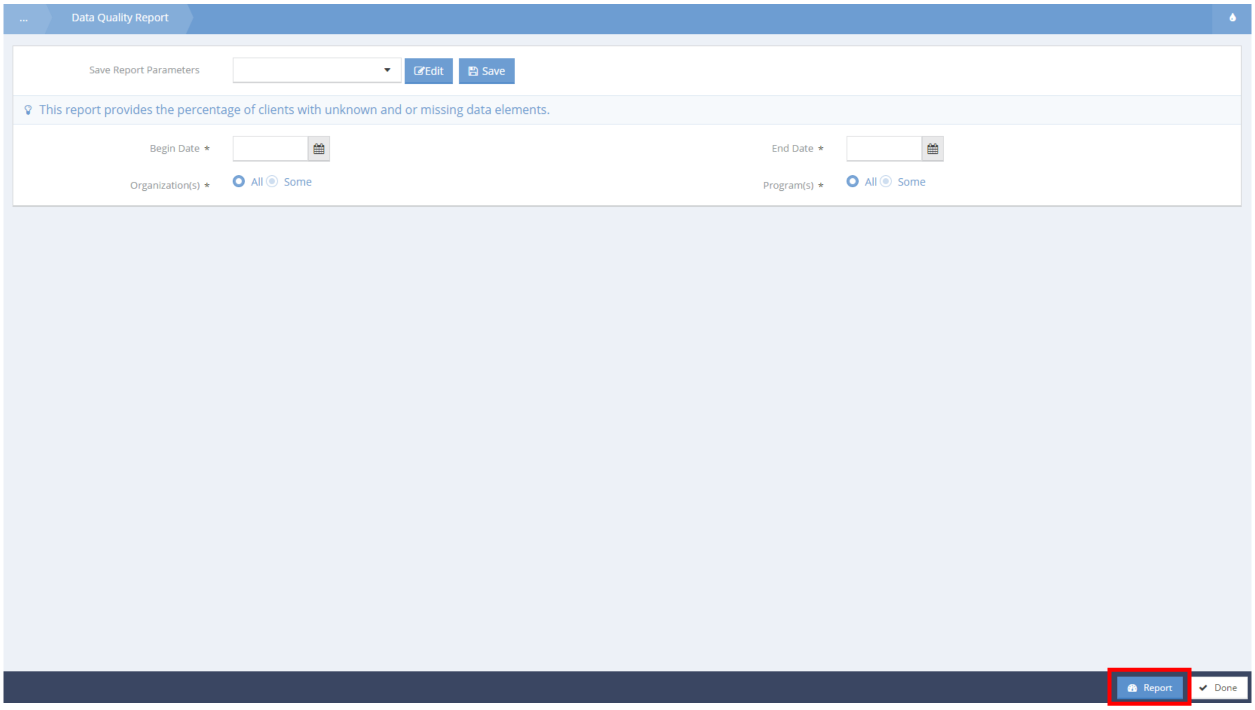
Duplicate Clients Page 1 of 34

Client Data Quality

To run a Client Data Quality report, click the Client Data Quality icon.



Enter a Begin Date and End Date. Choose any organizations and programs. Click Report when finished.



The report displays in a new window.

Data Quality Report

Run By aeliason - CaseWorthy on 12/22/2014 11:07:30 AM

Report Period............... 12/1/2014 - 12/22/2014
Program..................... All Programs
Organization(s)............ All Orgs

CaseWorthy

Drilldown Links to Program Types

Program Type	Total Count
CoC	922
Emergency Shelter	216
Transitional Housing	120
Permanent Supportive Housing	71
Homeless Outreach	359
Services Only program	42
Other	1
Safe Haven	117
Permanent Housing	29
Innovative Supportive Housing	4
Homelessness Prevention and Rapid Re-Housing	0
Homeless Assistance	1
PATH	0
Rapid Re-Housing (RRH)	116
Homeless Prevention	101
Not a HUD HMIS Project	0

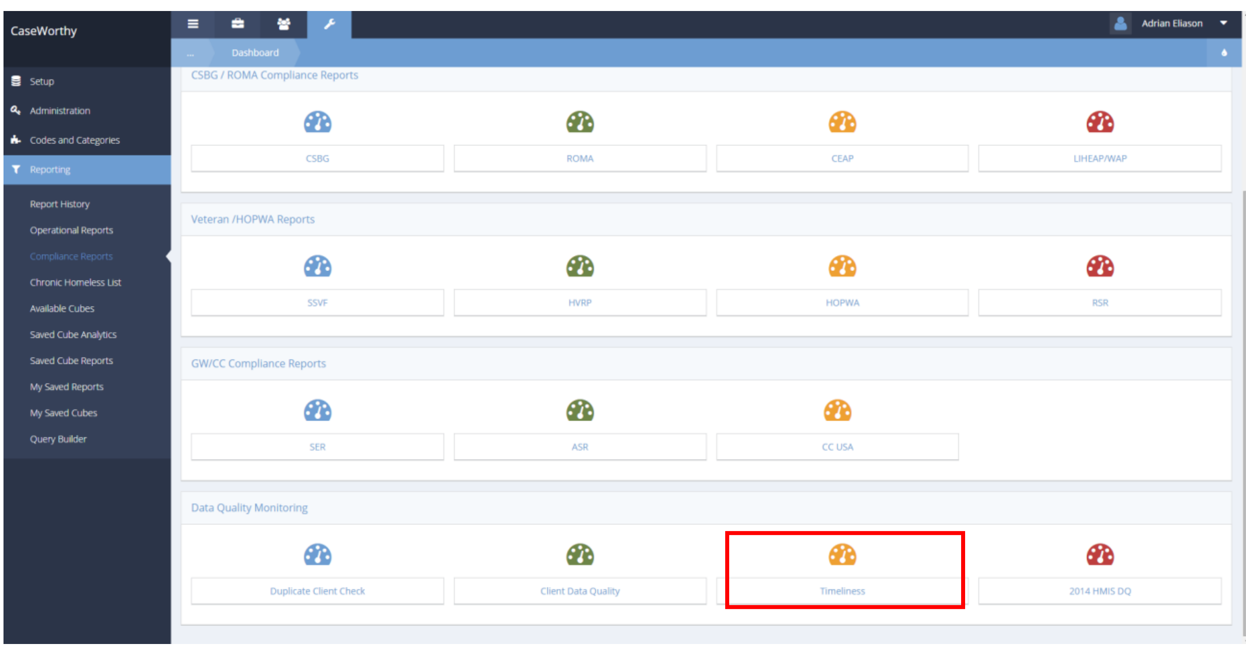
User Notice -
to maintain a professional appearance, hyperlinked Client Count data in this report will be visually separated from non-hyperlink data by using this blue color instead of using excessive underlining.

CoC

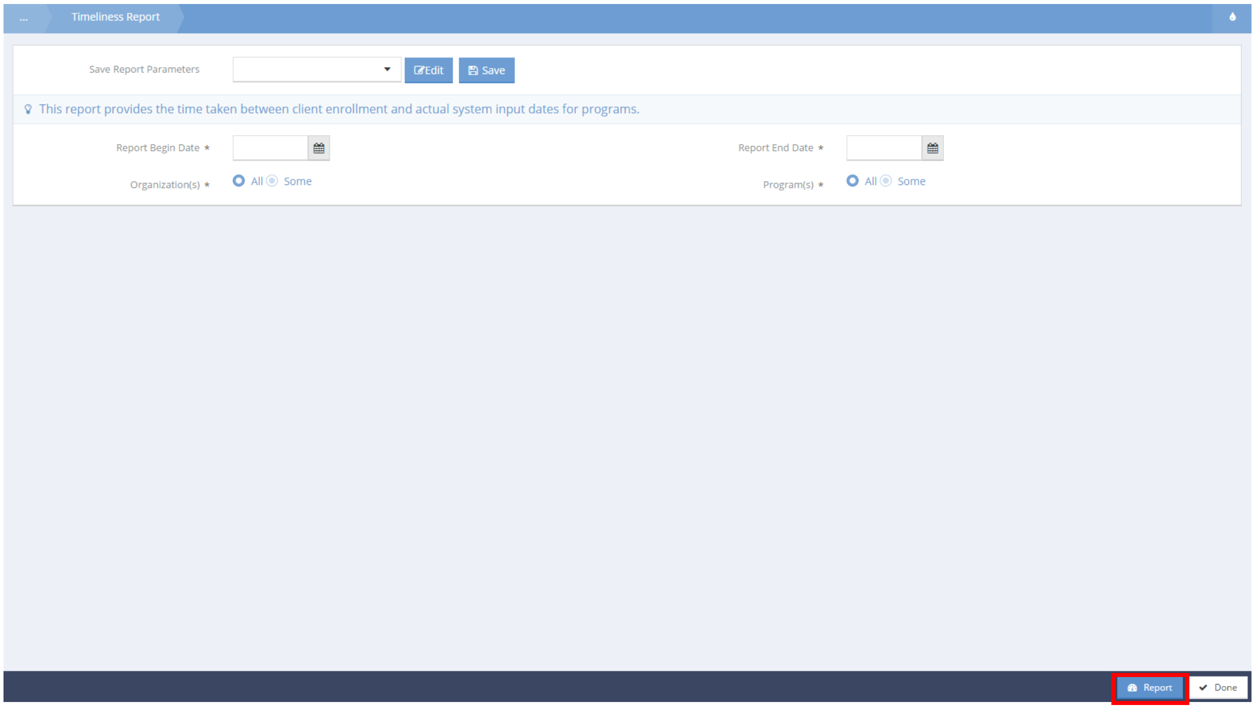
Total Client Count: 922	Don't Know or Refused			Missing		
Data Element	Count	Actual (%)	Tolerance (%)	Count	Actual (%)	Tolerance (%)
First Name	1	0	5	0	0	0
Last Name	0	0	0	0	0	0
SSN	137	15	0	62	7	0
Date of Birth	0	0	10	43	5	10
Ethnicity	172	19	0	19	2	0
Race	89	10	0	18	2	0

Timeliness

To run a Timeliness report, click the Timeliness icon.



Enter a report begin and end date. Choose any organizations and programs. Click Report when finished.



The report displays in a new window.

Timeliness Report

Run By aeliason - CaseWorthy on 12/22/2014 11:12:57 AM

Report Period............... 12/1/2014 - 12/22/2014
Program..................... All Programs
Organization(s)............ All Orgs

CaseWorthy

	Enrollments (Count)	Input Period (Avg)
Aggregate Statistics	146	0.00

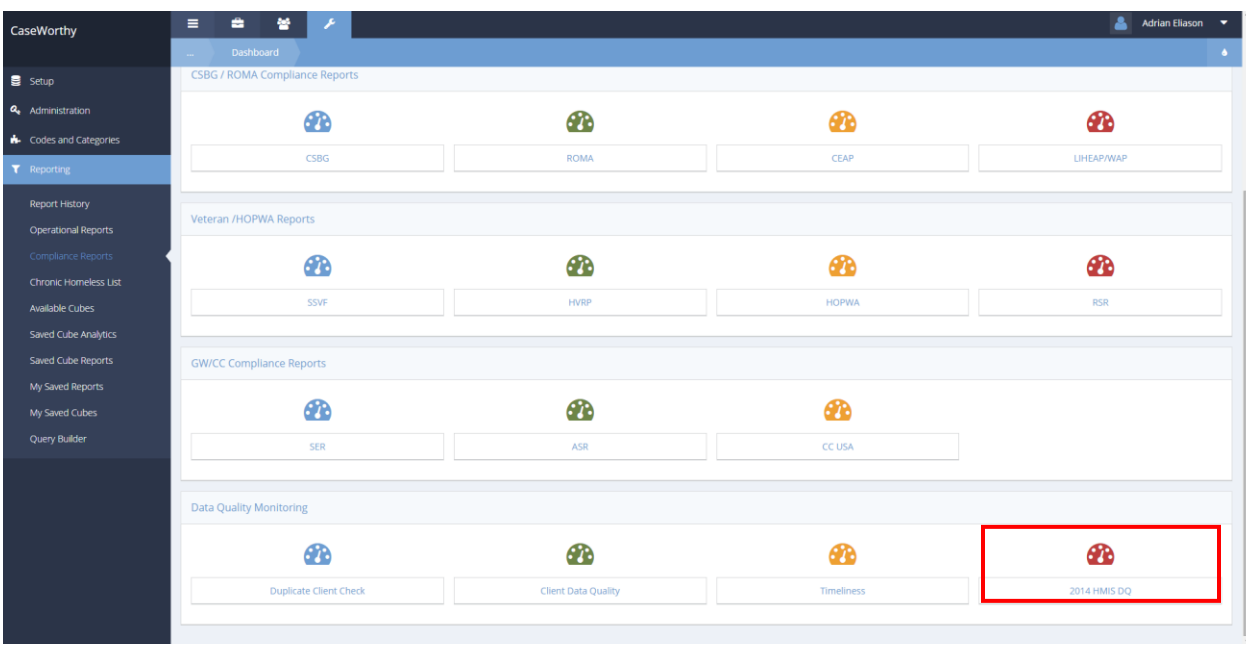
Average Days Taken to Input Enrollments

Program Name	Total Enrollments	Average Days to Input
!sample prog (HIV)	9	0.00
_CEAP / Utility Assistance	7	0.00
09 Head Start	7	0.00
1 English for Employment	4	0.00
12 Permanent Housing for Homeless Disabled	9	0.00
13 Safe Haven	3	0.00
15 Supportive Services Only	1	0.00
2 YAGA	2	0.00
24 Single Room Occupancy (SRO)	1	0.00
25 Ryan White	2	0.00
Adult Education	2	0.00
Basic HUD Project	5	0.00
BH Program	3	0.00
Budgets Program	1	0.00
CC Health Related Services	1	0.00
CC Housing	1	0.00
CC Other Basic Needs	1	0.00
CCSC Emergency Services	1	0.00
Chrysalis Center Project HEARRT	1	0.00
Common Intake	7	0.00
Employment Job Match Program	13	0.00

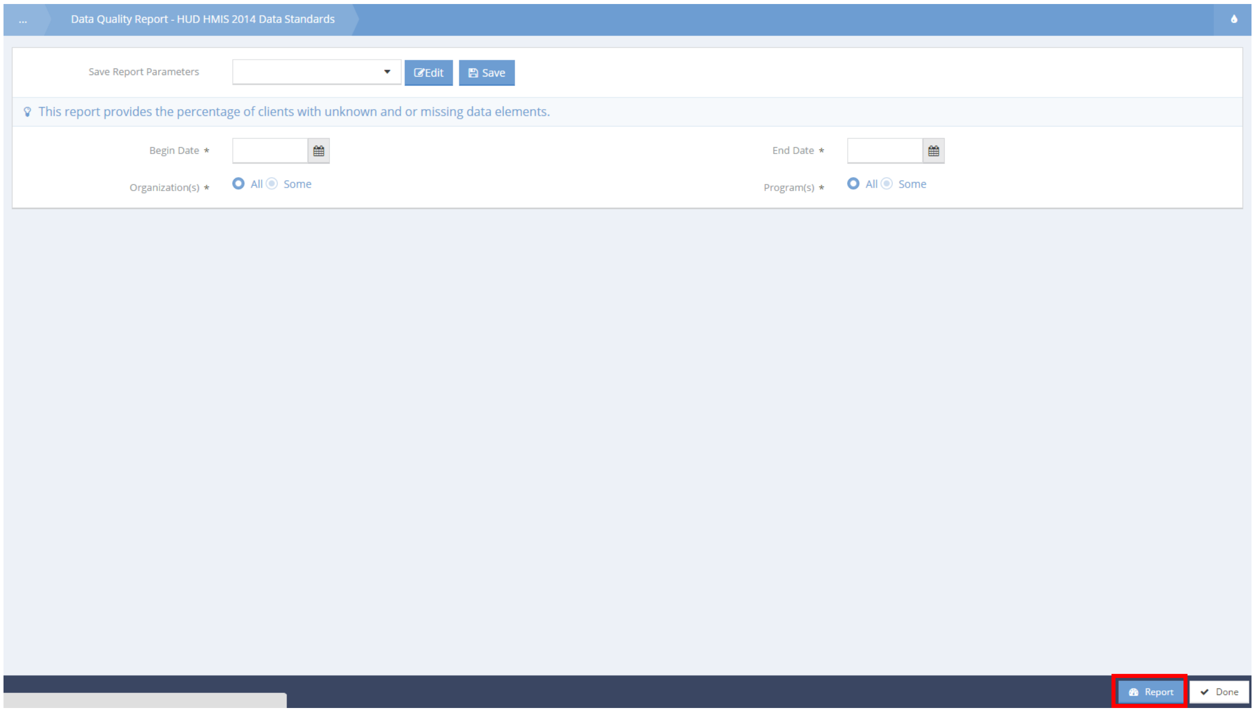
Timeliness Report Page 1 of 2

Data Quality Report – HUD HMIS 2014 Data Standards

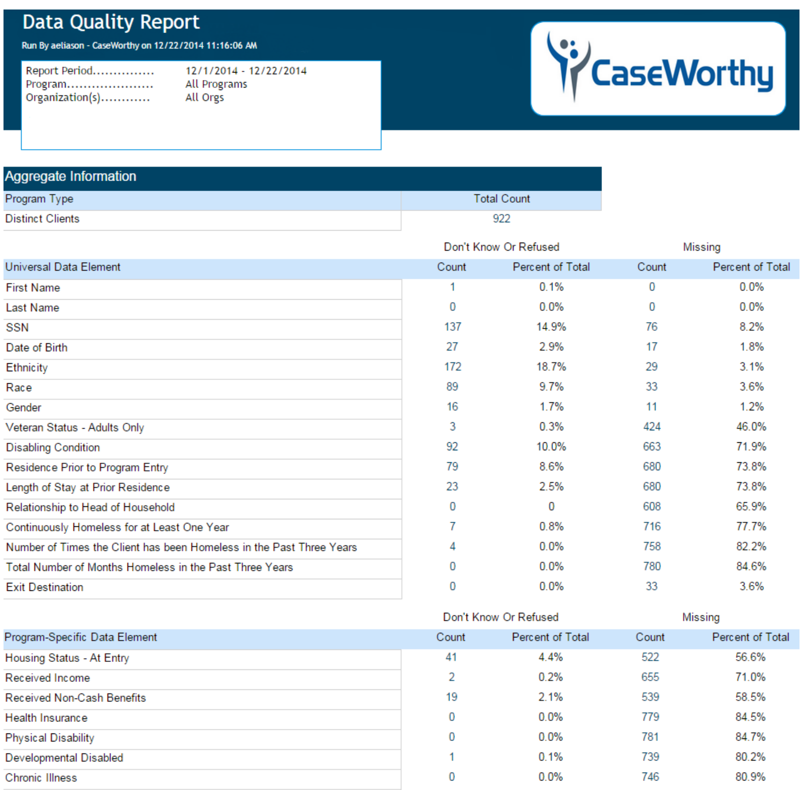
To run a 2014 HMIS DQ report, click the 2014 HMIS DQ icon.



Enter a begin and end date. Choose any organizations or programs. Click Report when finished.



The report displays in a new window.



Data Quality Report

Run By aeliason - CaseWorthy on 12/22/2014 11:16:06 AM

Report Period.............. 12/1/2014 - 12/22/2014
Program..................... All Programs
Organization(s)............ All Orgs

Aggregate Information

Program Type	Total Count
Distinct Clients	922

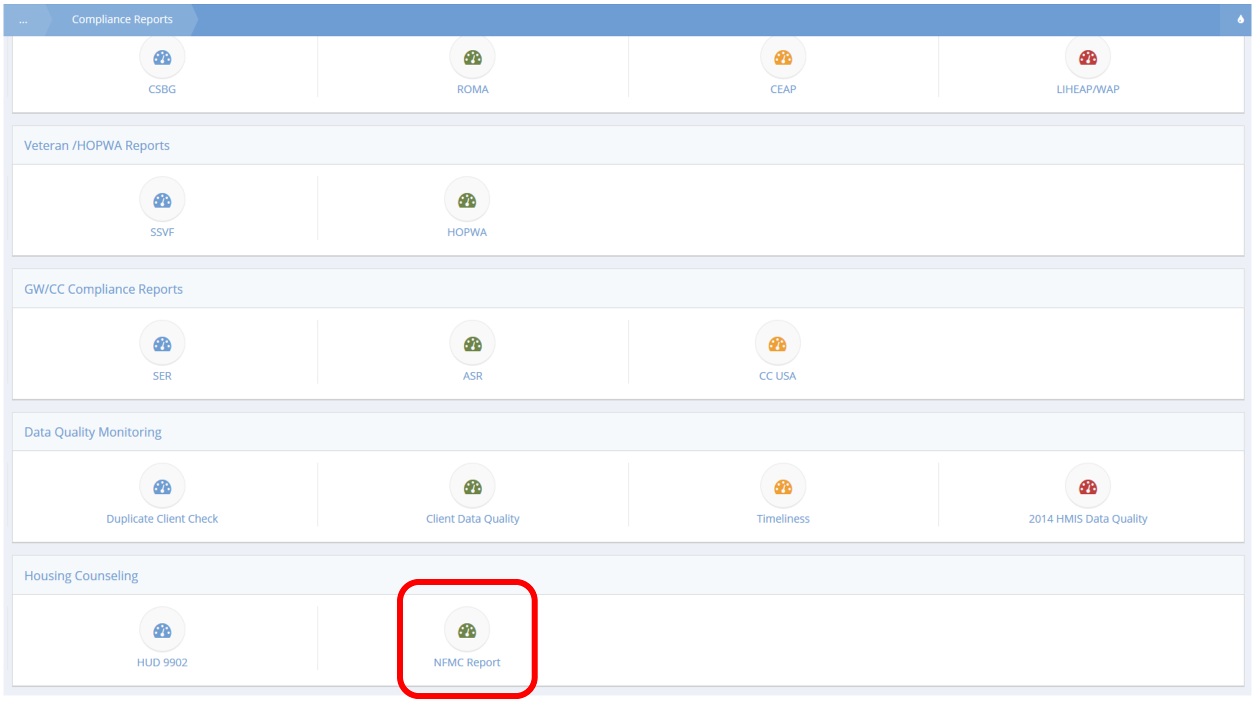
	Don't Know Or Refused		Missing	
Universal Data Element	Count	Percent of Total	Count	Percent of Total
First Name	1	0.1%	0	0.0%
Last Name	0	0.0%	0	0.0%
SSN	137	14.9%	76	8.2%
Date of Birth	27	2.9%	17	1.8%
Ethnicity	172	18.7%	29	3.1%
Race	89	9.7%	33	3.6%
Gender	16	1.7%	11	1.2%
Veteran Status - Adults Only	3	0.3%	424	46.0%
Disabling Condition	92	10.0%	663	71.9%
Residence Prior to Program Entry	79	8.6%	680	73.8%
Length of Stay at Prior Residence	23	2.5%	680	73.8%
Relationship to Head of Household	0	0	608	65.9%
Continuously Homeless for at Least One Year	7	0.8%	716	77.7%
Number of Times the Client has been Homeless in the Past Three Years	4	0.0%	758	82.2%
Total Number of Months Homeless in the Past Three Years	0	0.0%	780	84.6%
Exit Destination	0	0.0%	33	3.6%

	Don't Know Or Refused		Missing	
Program-Specific Data Element	Count	Percent of Total	Count	Percent of Total
Housing Status - At Entry	41	4.4%	522	56.6%
Received Income	2	0.2%	655	71.0%
Received Non-Cash Benefits	19	2.1%	539	58.5%
Health Insurance	0	0.0%	779	84.5%
Physical Disability	0	0.0%	781	84.7%
Developmental Disabled	1	0.1%	739	80.2%
Chronic Illness	0	0.0%	746	80.9%
HIV AIDS	4	0.4%	745	80.8%

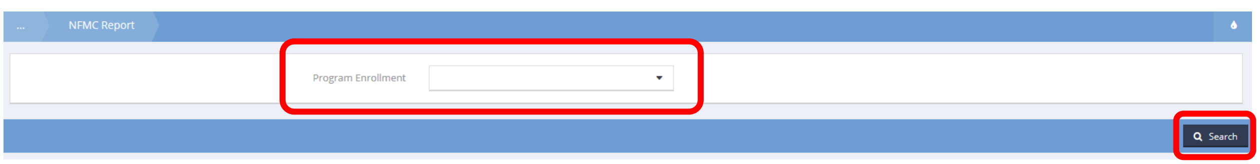
NFMC Report

Objective: Setup and launch the NFMC report.

Navigation: Administration>Reporting>Compliance Reports

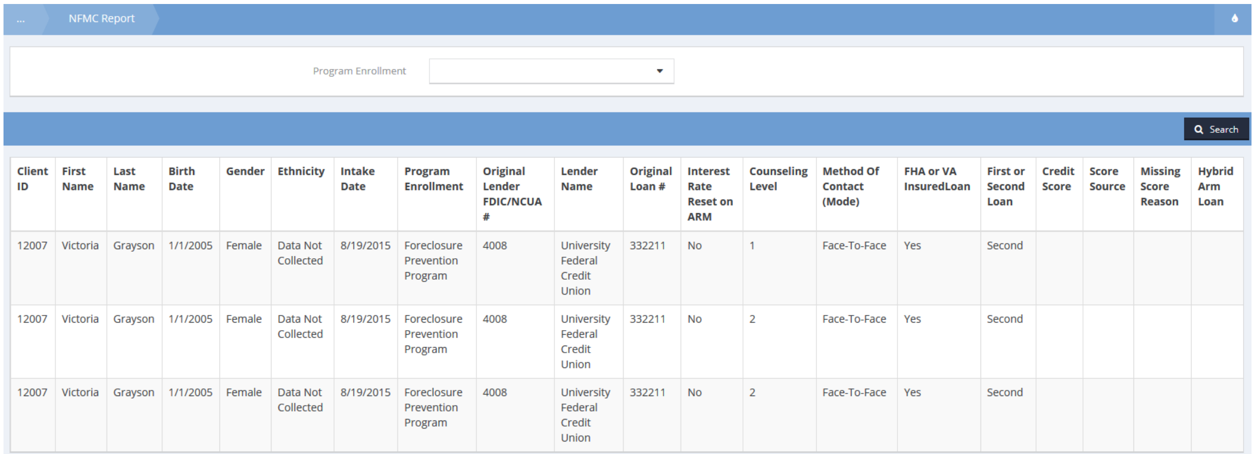


Click the icon for NFMC Report. The NFMC Report form displays.



Select an enrollment from the drop-down list and click the Search button.

All relevant clients display in the list below the header.

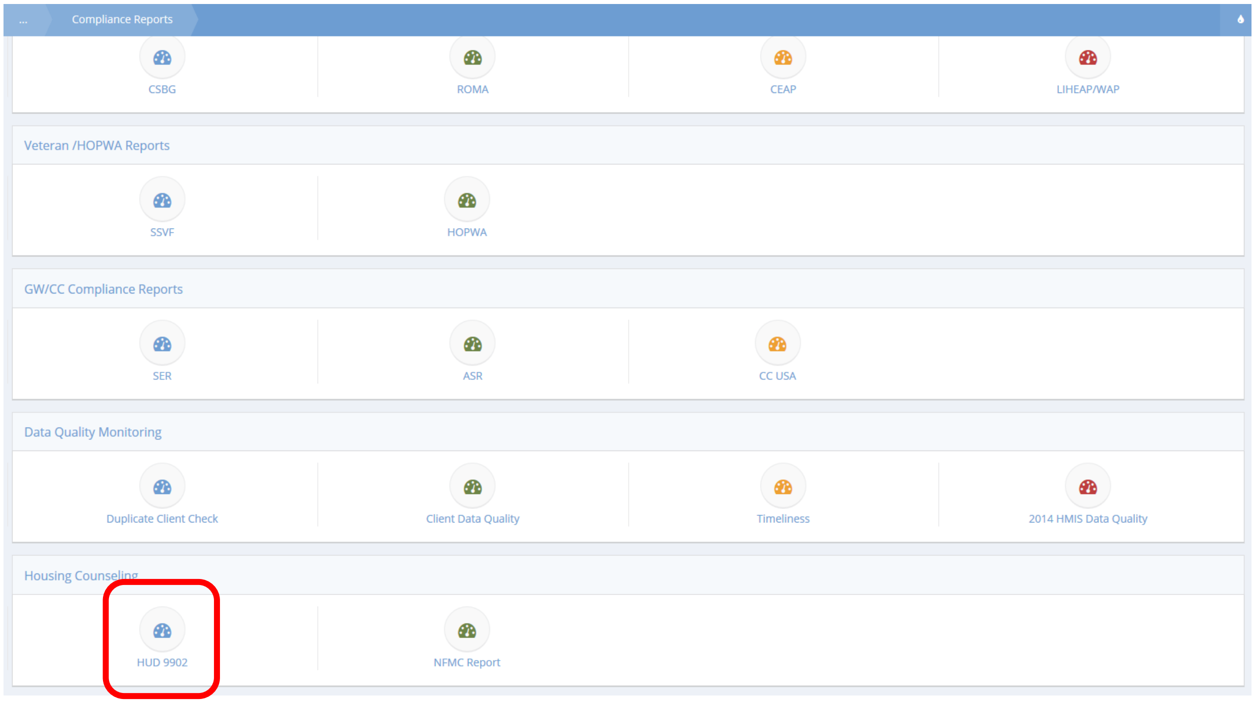


Client ID	First Name	Last Name	Birth Date	Gender	Ethnicity	Intake Date	Program Enrollment	Original Lender FDIC/NCUA #	Lender Name	Original Loan #	Interest Rate Reset on ARM	Counseling Level	Method Of Contact (Mode)	FHA or VA InsuredLoan	First or Second Loan	Credit Score	Score Source	Missing Score Reason	Hybrid Arm Loan
12007	Victoria	Grayson	1/1/2005	Female	Data Not Collected	8/19/2015	Foreclosure Prevention Program	4008	University Federal Credit Union	332211	No	1	Face-To-Face	Yes	Second				
12007	Victoria	Grayson	1/1/2005	Female	Data Not Collected	8/19/2015	Foreclosure Prevention Program	4008	University Federal Credit Union	332211	No	2	Face-To-Face	Yes	Second				
12007	Victoria	Grayson	1/1/2005	Female	Data Not Collected	8/19/2015	Foreclosure Prevention Program	4008	University Federal Credit Union	332211	No	2	Face-To-Face	Yes	Second				

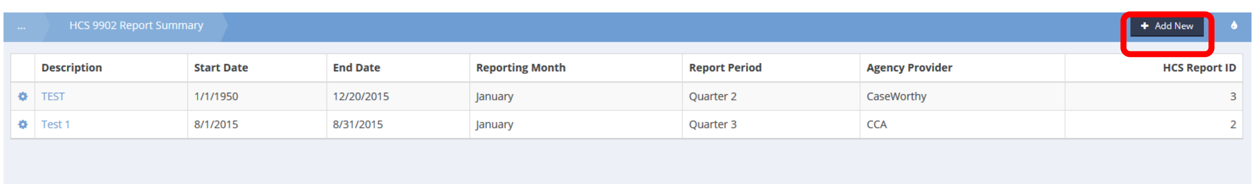
HCS 9902 Report Summary

Objective: Setup and launch the HCS 9902 report.

Navigation: Administration>Reporting>Compliance Reports

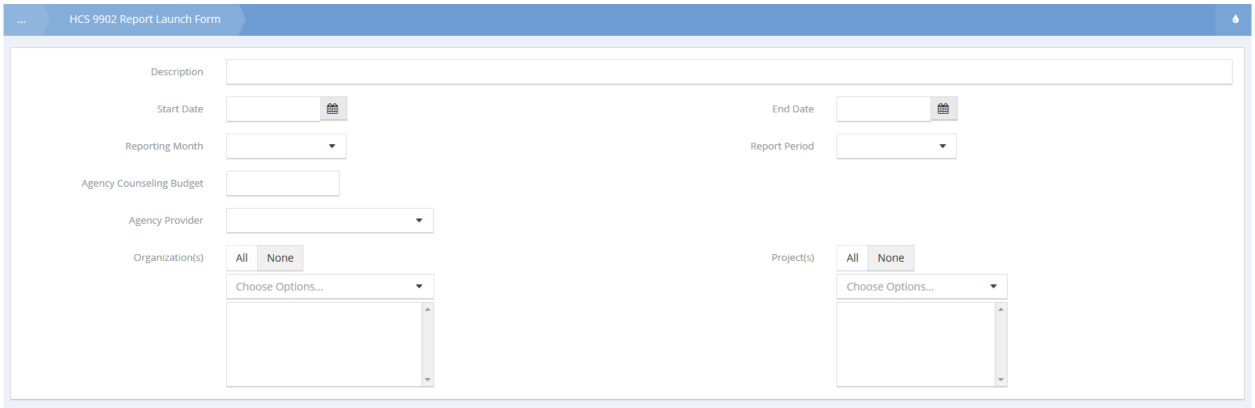


Click the icon for HUD 9902. The HCS 9902 Report Summary form displays.



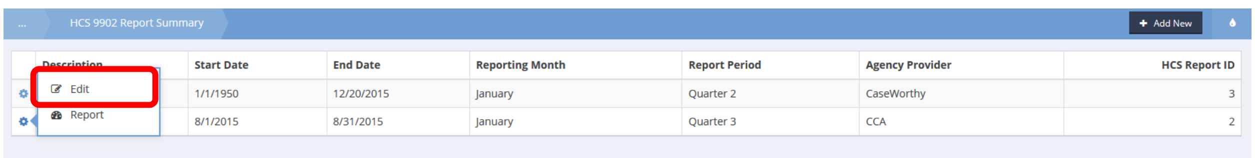
Click the + Add New button to create a new report.

The HCS 9902 Report Launch Form displays.

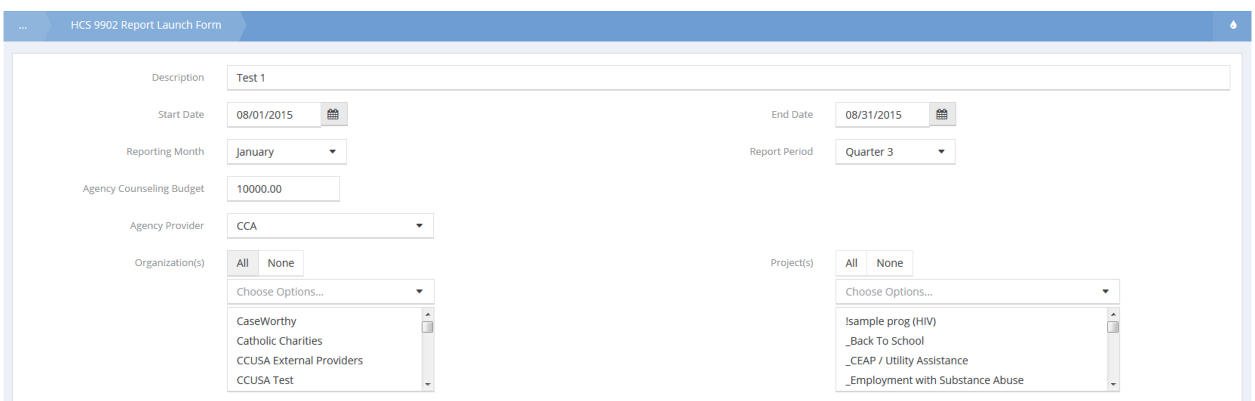


Fill out all fields with the desired info for the report. Click Save when finished.

To edit an existing report from the summary form, click the action gear icon associated with it and select Edit from the pop up menu that appears.

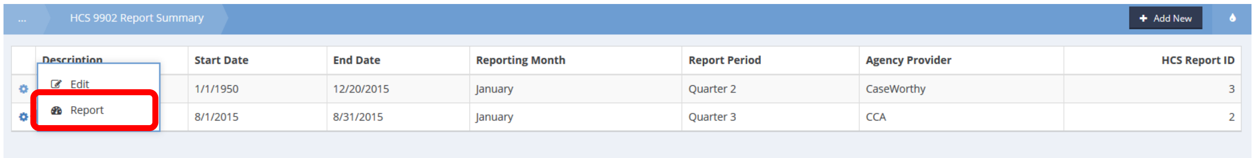


The HCS 9902 Report Launch Form displays.

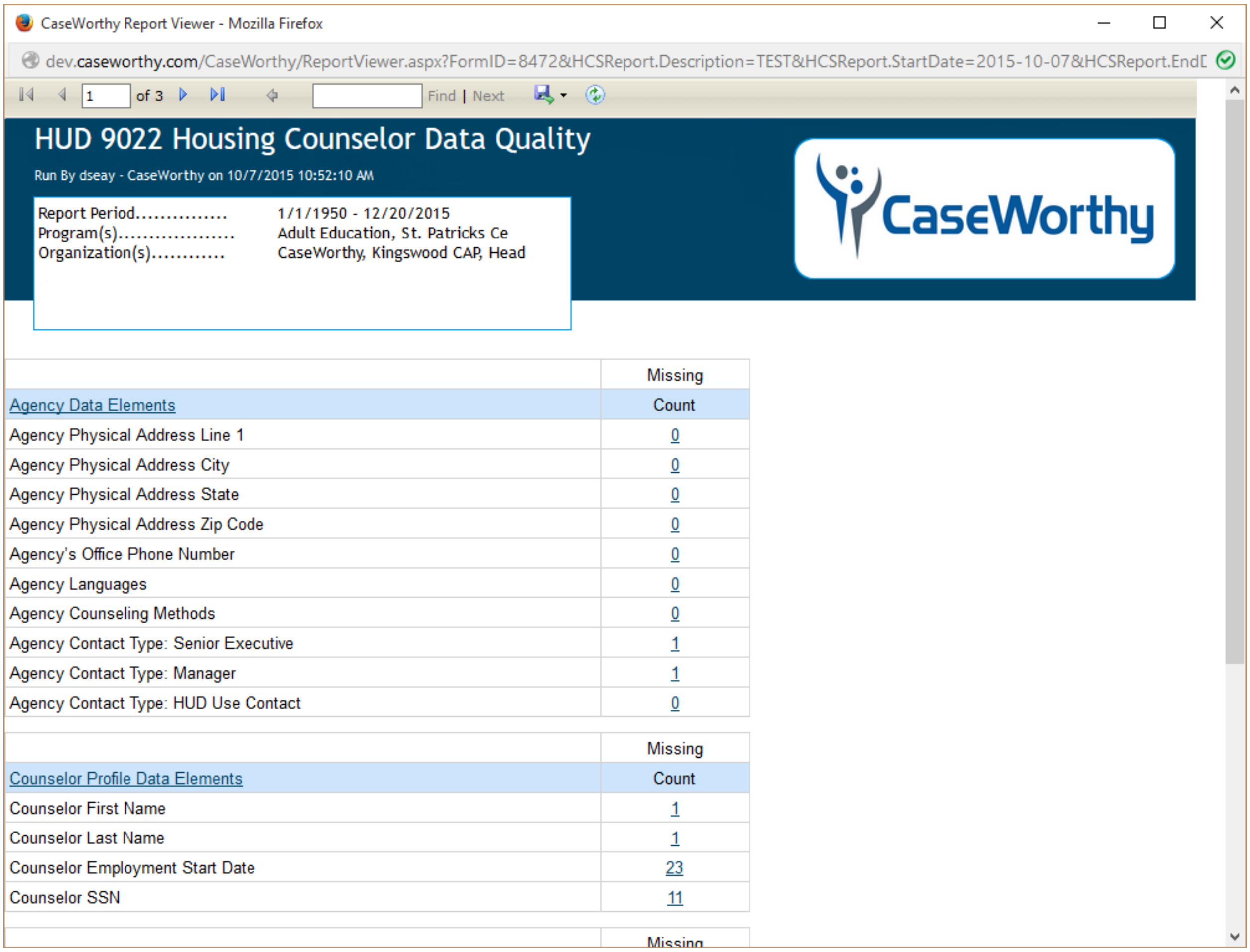


Make any desired changes and click Save when finished.

To run a report from the summary form, click the action gear icon associated with it and select Report from the pop up menu that appears.



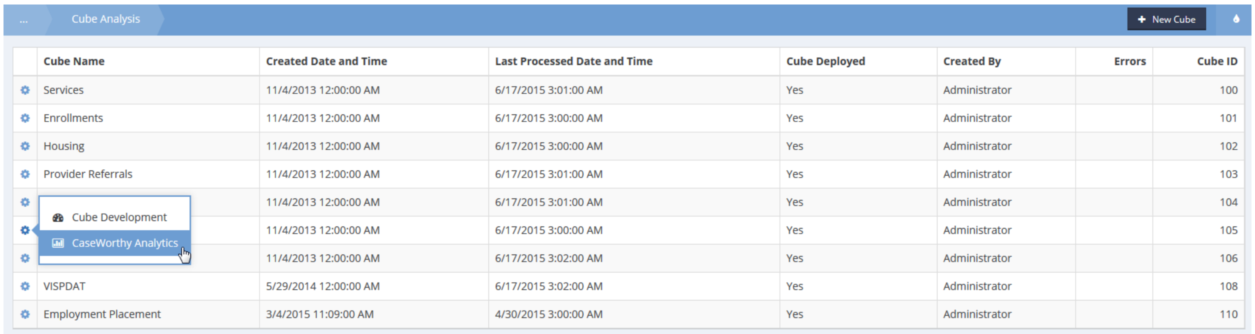
The Report displays in a new window.



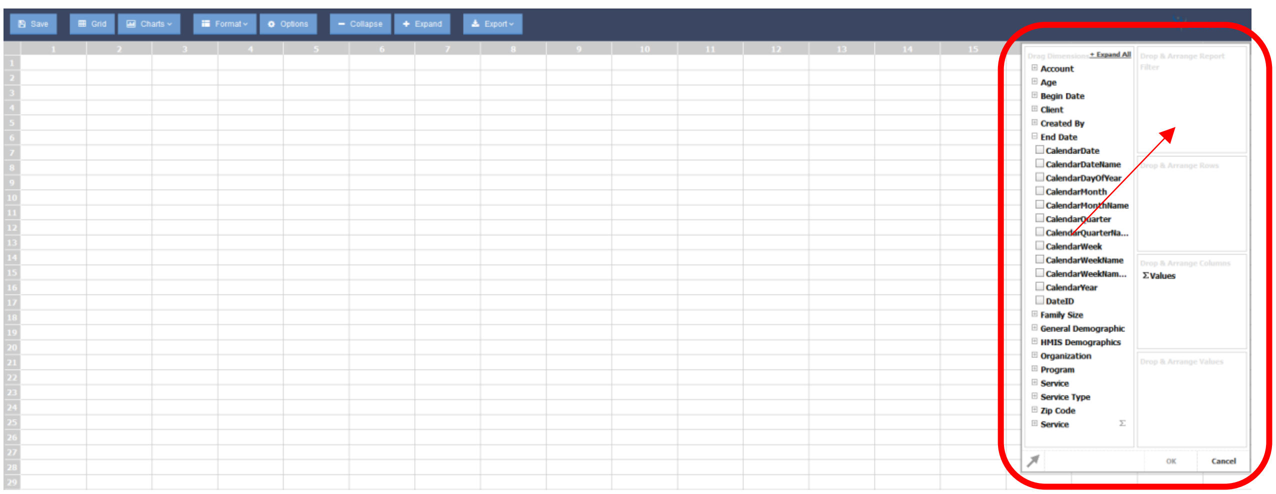
CaseWorthy Analytics

(Administration>Reporting>Available Cubes)

The Cube Analysis form displays.

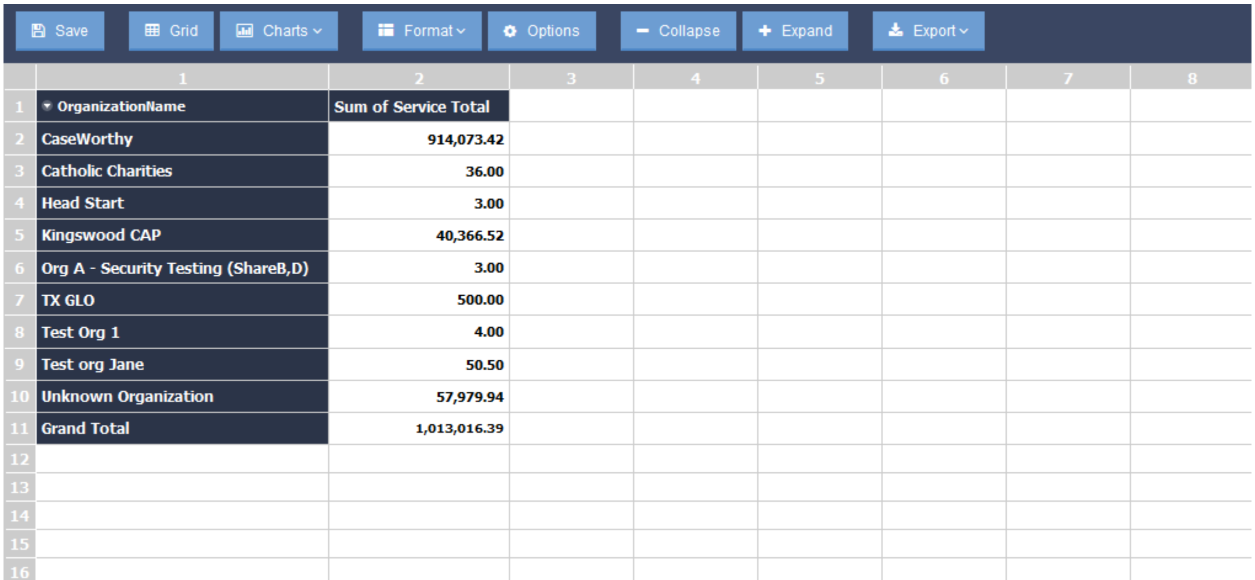


Locate the cube desired to be accessed, click the action gear icon and click CaseWorthy Analytics.



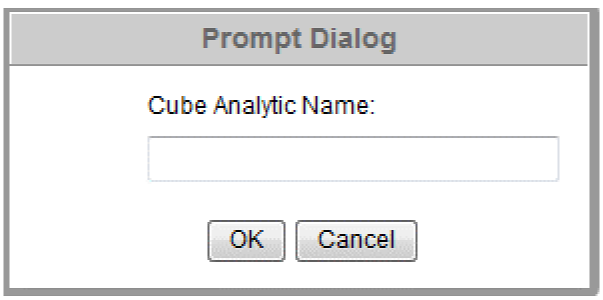
After the table has loaded, drag the desired parameters into each field. When finished, click the OK button.

The report renders.



	1	2	3	4	5	6	7	8
1	OrganizationName	Sum of Service Total						
2	CaseWorthy	914,073.42						
3	Catholic Charities	36.00						
4	Head Start	3.00						
5	Kingswood CAP	40,366.52						
6	Org A - Security Testing (ShareB,D)	3.00						
7	TX GLO	500.00						
8	Test Org 1	4.00						
9	Test org Jane	50.50						
10	Unknown Organization	57,979.94						
11	Grand Total	1,013,016.39						
12								
13								
14								
15								
16								

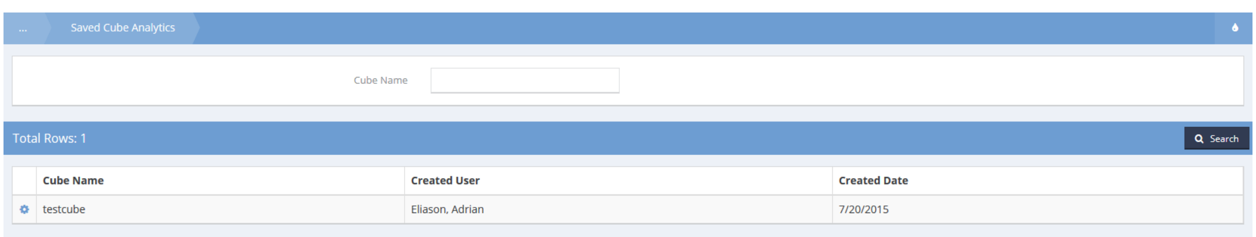
The data can be rearranged using the various options at the top of the form. To keep the cube for future use, click the Save button.



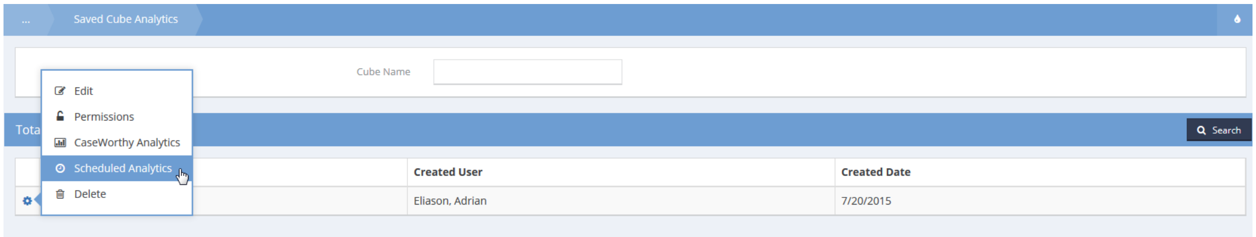
A dialog appears. Enter a name and click the OK button. The cube now appears in the Saved Cube Analytics form.

Saved Cube Analytics

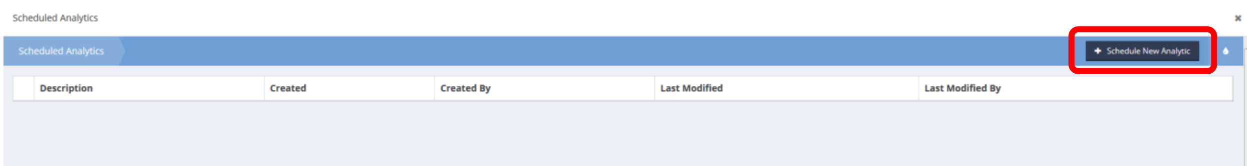
(Administration>Reporting>My Saved Cube Analytics)



Any previously saved analytics display on the summary form.

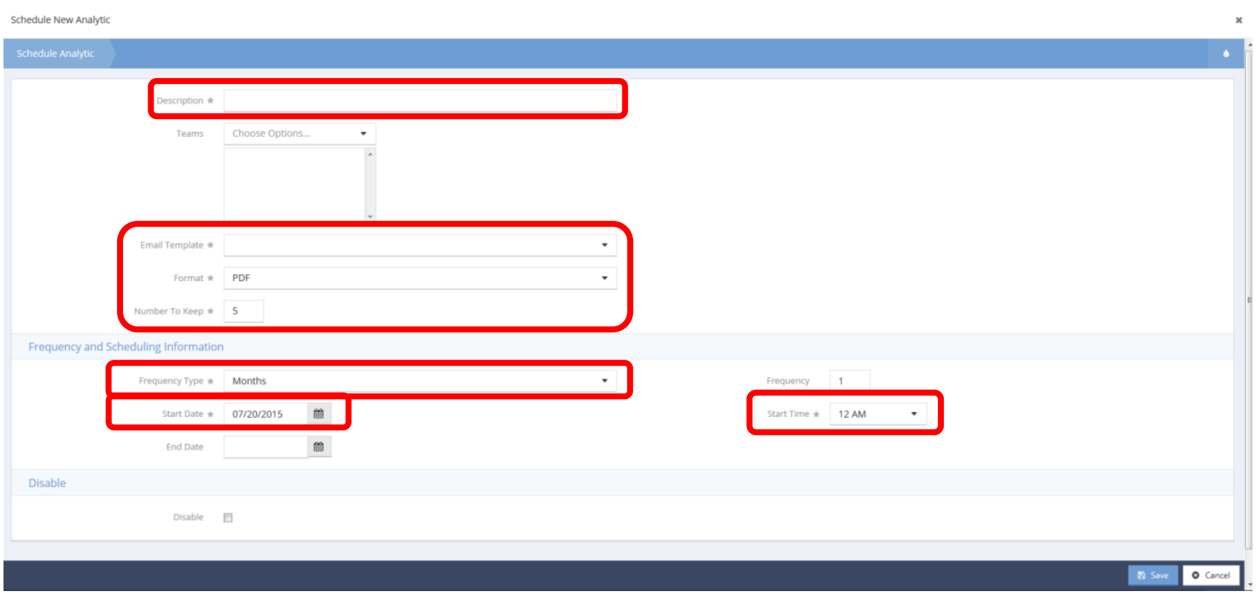


To view or edit scheduled analytics, click the action gear icon and click Scheduled Analytics. The Scheduled Analytics form displays.



To schedule new analytics, click the Schedule New Analytic button.

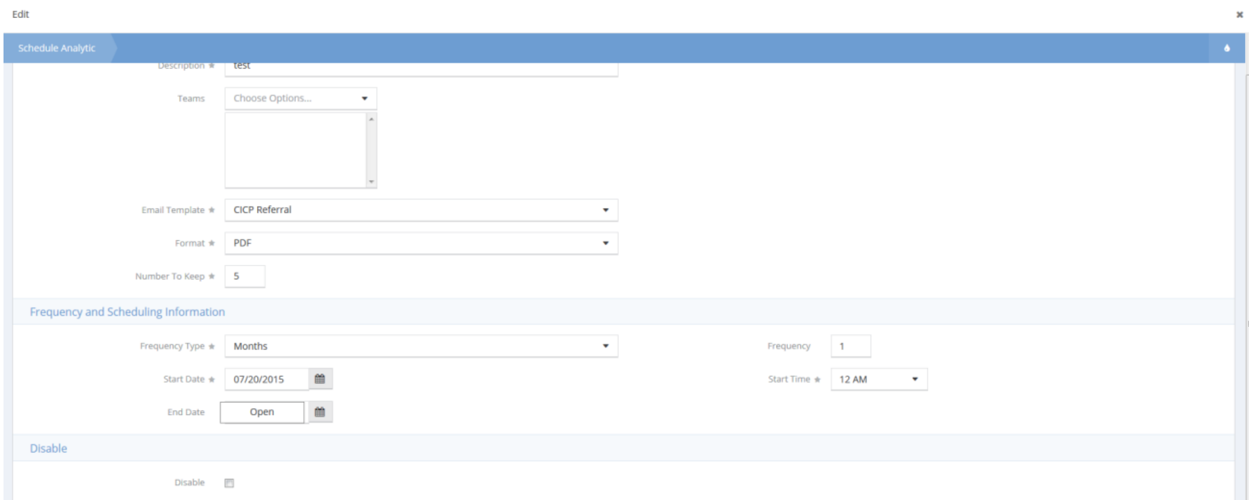
The Schedule Analytic form displays.



Enter a description and select an email template and format from the drop-down lists. For the number to keep field, enter the amount of reports desired to be retained. Select a frequency from the drop-down list and enter a start date, start time and end date if desired. To prevent an analytic from being run without deleting it, click the disable checkbox. Click Save when finished.

Edit CaseWorthy Analytics

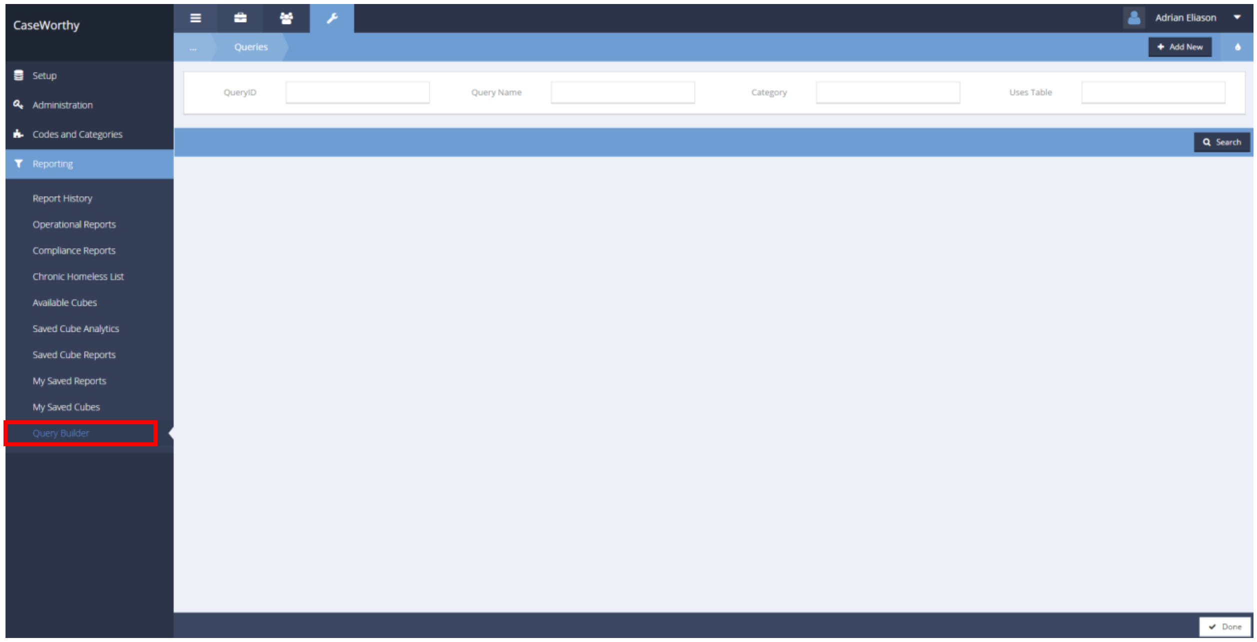
To edit an existing schedule analytic, click the action gear icon and click Edit.



Make any desired changes and click Save when finished.

Query Builder

(Administration>Reporting>Query Builder)



The Query Builder is intended to be utilized only by System Administrators. Queries are a quick means of accessing defined data stored in the system. There are numerous baseline queries included in CaseWorthy™. System Administrators can also create custom queries.

There are 4 types of queries in the system; Form, List, General and Sub-Queries.

Form Query - This is a query that is used on a form to define how the form relates to the underlying data structure. This is the "Data View" on the form designer.

List Query – This is a query that is used to get list values for a dropdown list. Queries of this type should return a ListLabel and a ListValue column to define the plain text that should be shown to the user and the stored value respectively.

General Query - A general purpose query used to get data for ad-hoc analysis or to be displayed on a dashboard.

Sub-Query - A query that is intended to be used by another query. It can apply complex filters and returns a SINGLE column that the main query uses.

New queries can be created from the Query Builder area in the Reporting menu, or on the fly within the system on forms, in drop down lists and on dashboards.

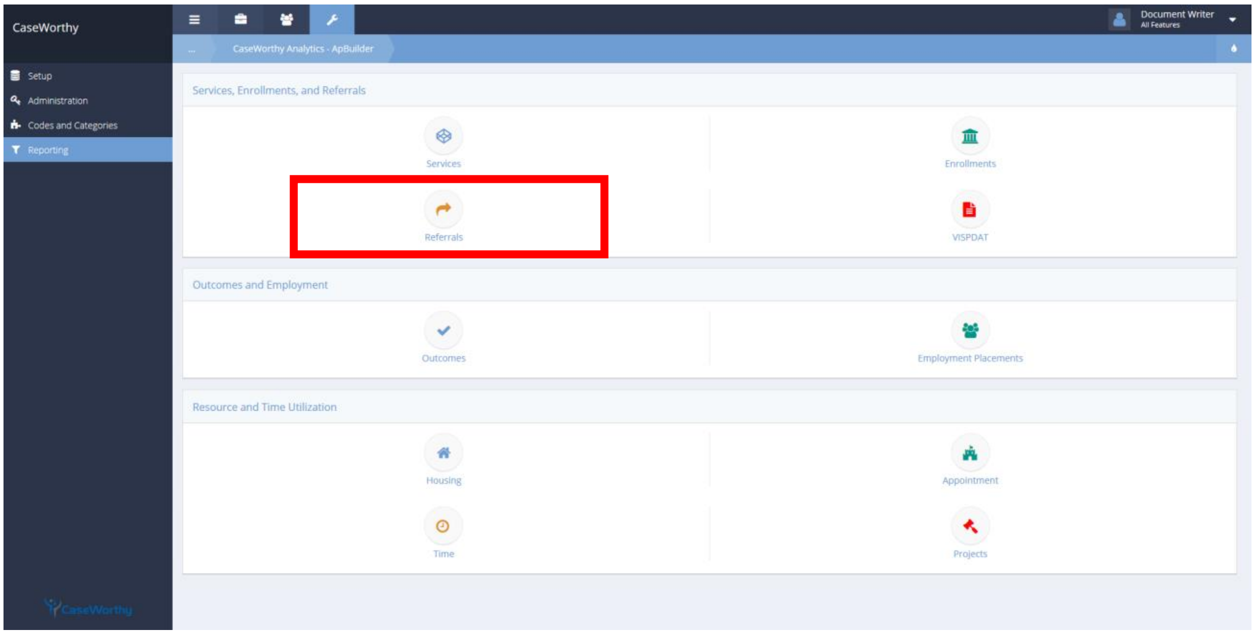
Using the Query Builder is not the most effective or efficient means for generating reports, but can come in handy to view a quick snap-shot of specified data.

CaseWorthy Analytics - ApBuilder

Referrals

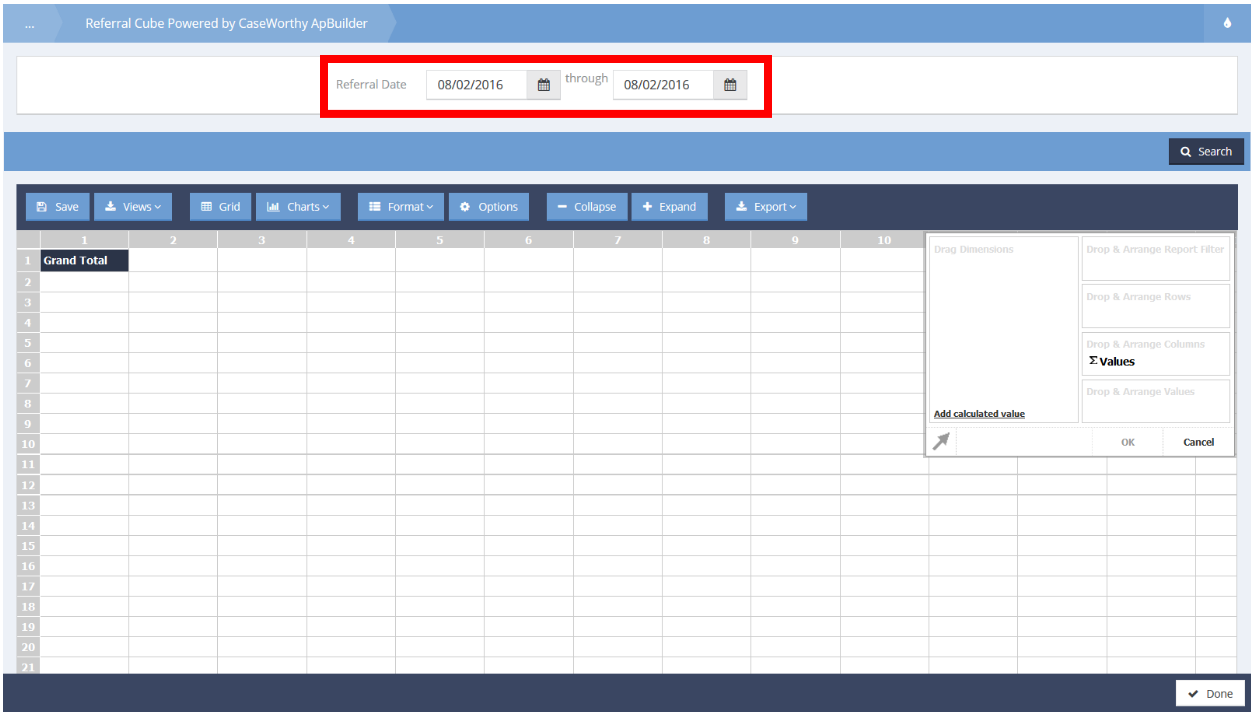
Objective: Run CaseWorthy Analytics based on a specified dated range.

Navigation: Administration>Reporting>CaseWorthy Analytics - ApBuilder



Select Referrals from the Services, Enrollments, and Referrals portion of the CaseWorthy Analytics – ApBuilder dashboard.

The Referral Cube Powered by CaseWorthy ApBuilder displays.



Select a date range for the selected cube to run from. All other functionality is comparable to a standard pivot table form.

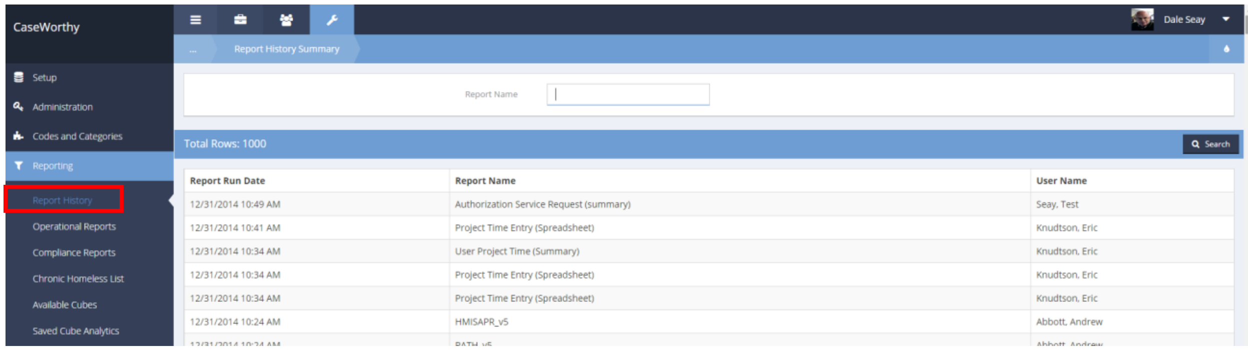
Follow the same steps as outline above for the following new forms that utilize the same functionality:

Enrollments Cube Powered by CaseWorthy ApBuilder
VISPDAT Cube Powered by CaseWorthy ApBuilder
Outcomes Cube Powered by CaseWorthy ApBuilder
Employment Placement Cube Powered by CaseWorthy ApBuilder
Housing Cube Powered by CaseWorthy ApBuilder
Appointment Cube Powered by CaseWorthy ApBuilder
Time Cube Powered by CaseWorthy ApBuilder
Projects Cube Powered by CaseWorthy ApBuilder

Report History

(Administration>Reporting>Report History)

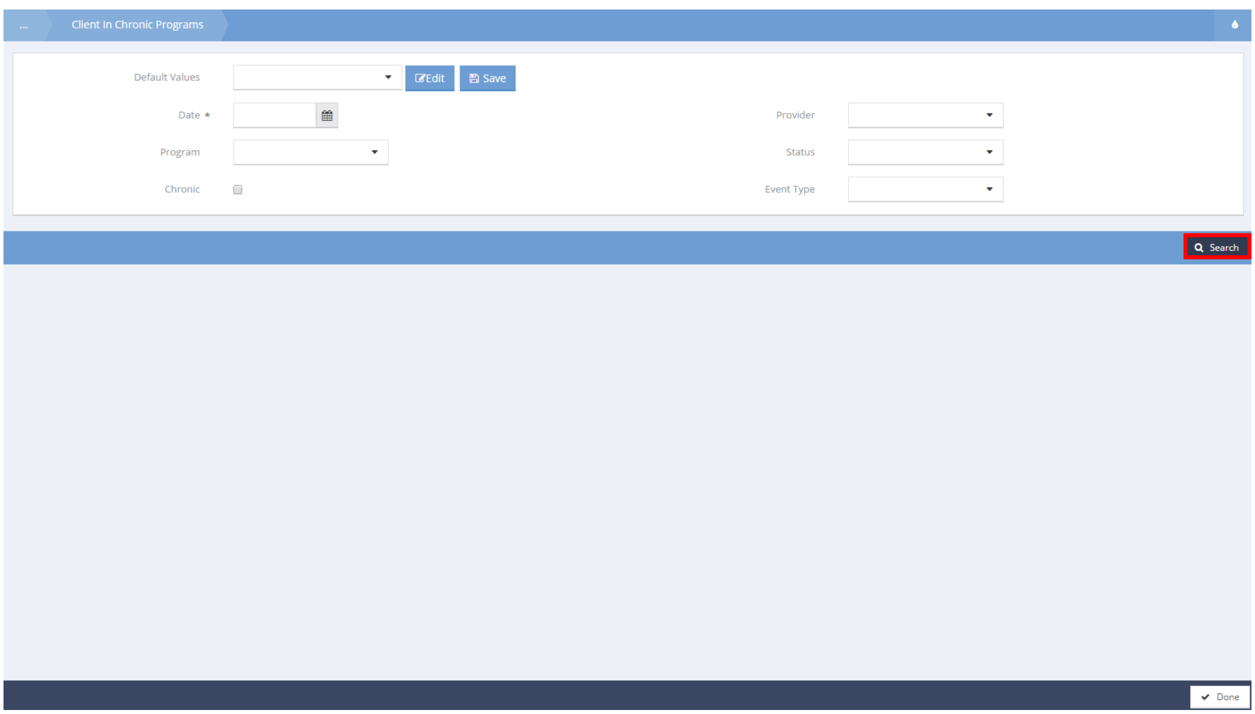
To filter the data returned on the form, enter any or all of the desired report name in the Report Name field and click on the Search button.



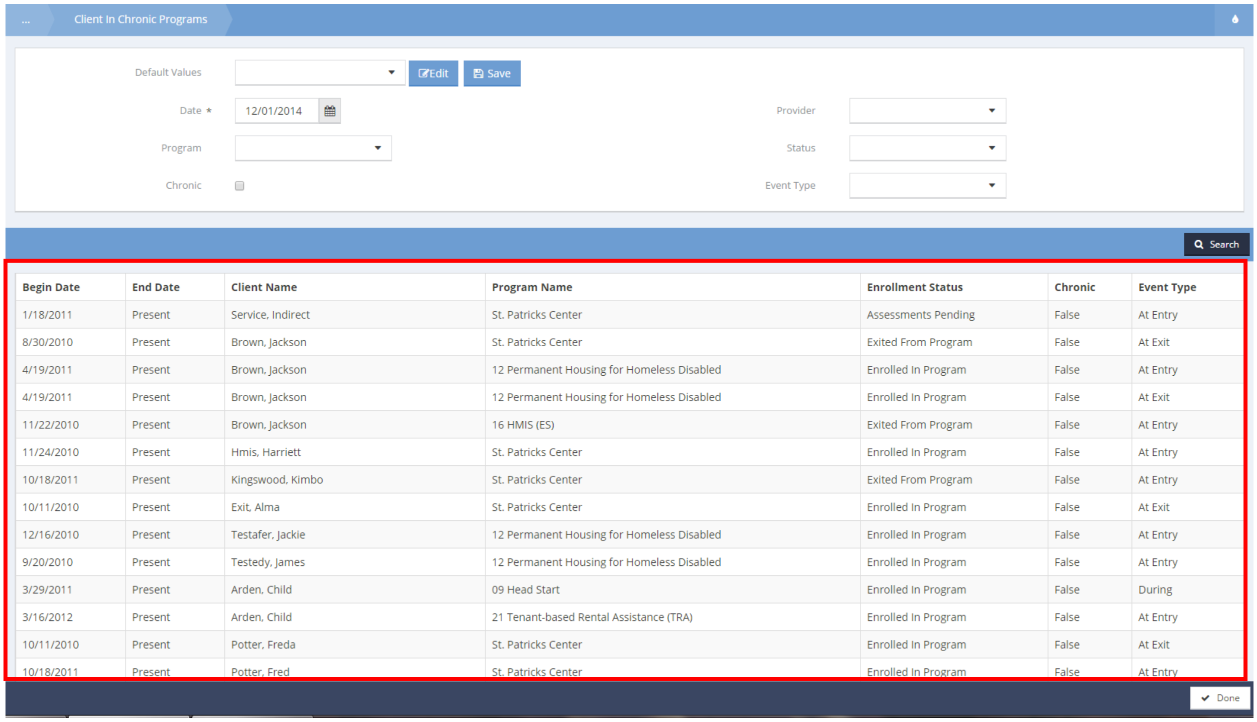
A summary of reports displays. The list can be sorted by name, date, and the user who created the report.

Chronic Homeless List

Enter a date and any other relevant info. Click the Search button.



The list displays in the space below.


Client In Chronic Programs
Default Values
Edit
Save
Date *
12/01/2014
Provider
Program
Status
Chronic
Event Type
Search
Begin Date End Date Client Name Program Name Enrollment Status Chronic Event Type
1/18/2011 Present Service, Indirect St. Patricks Center Assessments Pending False At Entry
8/30/2010 Present Brown, Jackson St. Patricks Center Exited From Program False At Exit
4/19/2011 Present Brown, Jackson 12 Permanent Housing for Homeless Disabled Enrolled In Program False At Entry
4/19/2011 Present Brown, Jackson 12 Permanent Housing for Homeless Disabled Enrolled In Program False At Exit
11/22/2010 Present Brown, Jackson 16 HMIS (ES) Exited From Program False At Entry
11/24/2010 Present Hmis, Harriett St. Patricks Center Enrolled In Program False At Entry
10/18/2011 Present Kingswood, Kimbo St. Patricks Center Exited From Program False At Entry
10/11/2010 Present Exit, Alma St. Patricks Center Enrolled In Program False At Exit
12/16/2010 Present Testafer, Jackie 12 Permanent Housing for Homeless Disabled Enrolled In Program False At Entry
9/20/2010 Present Testedy, James 12 Permanent Housing for Homeless Disabled Enrolled In Program False At Entry
3/29/2011 Present Arden, Child 09 Head Start Enrolled In Program False During
3/16/2012 Present Arden, Child 21 Tenant-based Rental Assistance (TRA) Enrolled In Program False At Entry
10/11/2010 Present Potter, Freda St. Patricks Center Enrolled In Program False At Exit
10/18/2011 Present Potter, Fred St. Patricks Center Enrolled In Program False At Entry
Done