



System Administrator

v 7.2 • June 24, 2019



CaseWorthy, Inc.

3995 South 700 East

Suite 420

Salt Lake City, Utah

84107

Tel: 877-347-0877 Fax: 801-207-8350

Last edited: 24 June 2019

Copyright © 2017 CaseWorthy, Inc. All rights reserved.

No part of this publication may be reproduced, transmitted, transcribed, stored in a retrieval system, or translated into any language, in any form or by any means, electronic, mechanical, photocopying, recording, or otherwise, without prior written permission from CaseWorthy, Inc.

All copyright, confidential information, patents, design rights and all other intellectual property rights of whatsoever nature contained herein are and shall remain the sole and exclusive property of CaseWorthy, Inc. The information furnished herein is believed to be accurate and reliable.

However, no responsibility is assumed by CaseWorthy, Inc. for its use, or for any infringements of patents or other rights of third parties resulting from its use.

The CaseWorthy™ name and logo are trademarks or registered trademarks of CaseWorthy, Inc.

All other trademarks are the property of their respective owners.

Table of Contents

Administration Tab	1
Setup Menu	2
Organizations	2
Data Sharing	5
Provider Setup	7
Resource Usage Manage Facility	12
Scattered Site Housing	16
Provider Mailing Address	25
Provider Inspections	28
Provider Services	30
Navigation: Administration > Setup > Organizations	37
School Calendar	39
User Setup	41
User Credentials and Skills	44
Teams	57
Approval Process Edit	57
Seasonal and Overflow Bed Setup	58
Programs	63
Eligibility Rule	67
Services Setup	68
Linking Services to Programs	72
Add Entity Service Plan (Input)	75
Entity Service Plan Goal and Step Add	78
Secured Organizations	83
Program Options	85
Program Follow-up Types	85
Programs Positions	88
Program Financial Types	92

HMIS Set Up	96
Linking Assessments to Programs	98
Linking Outcomes to Programs	102
Program Budgets.....	105
Programs and Accounts	111
Programs by Assessment Type (9344).....	112
Team Categories	113
Housing and Classroom Set Up.....	114
Resources	116
Usages	119
Slot Inventory.....	123
Lockers.....	125
Parking.....	127
Edit Resource Slot Category Type.....	128
Add In/Out Resource Usage Event	131
Provider Options	135
Linking Programs to Providers	135
Linking Referral Services to Providers	137
Linking Landlord Properties to Providers.....	139
Accounts.....	143
Approval Groups/Teams.....	153
Approval Processes.....	161
View Account Monthly Summary	164
Approved Summary by Account.....	166
CSD – Committed Summary (All Acts).....	168
CSD – Service Reqs – On Hold (View Only)	169
View Account Monthly Summary	169
System Mapping	170
Goal Mapping	170

Goal Steps.....	171
Map to Outcomes.....	173
Program Mapping.....	176
Classes.....	177
Goals.....	178
Program Questions	180
Issue Mapping	183
Map to Goals.....	185
Map to Programs.....	187
Map to Referral Service	189
Call Center Mapping	191
Report Mapping.....	193
Map Zip Codes.....	194
Map Issues.....	197
Map Issue Type to Report Value (VISPDAT)	198
Map Issue Type to Report Value (CCUSA)	200
Suggest Plan Program (Summary)	202
Service Plan Mappings.....	204
RHY Report Mapping	207
Map Service Type to Report Value (Generic).....	209
Map Issue Type to Report Value (Generic).....	212
Workflows	214
Batch Processes	234
Alert Configuration.....	237
Client Badge Summary	238
Actions – Issues.....	240
Client Account Configuration.....	241
Portal Default.....	242
Integration Processes	243

Entity Duplicate Check Configuration	244
Reporting Framework.....	245
Reporting Framework	252
Edit Scoring.....	254
Administration Menu	257
Application Settings.....	257
Default Print Template	258
Log-In Help Message.....	259
New Application Settings.....	261
SSNRestriction.....	262
AllowDuplicateEnrollmentWithinDatabase	262
HideExtraVetFields.....	262
Bulletin Board Administration.....	264
Bulletin Board Permissions	265
Batch File Exports.....	267
Client Administration.....	268
Permanent Delete	269
Merge Client Records.....	270
Move Case Load	272
CaseWorthy™ Administration	274
Reports.....	274
Forms.....	274
Lists	277
Queries.....	280
Dashboards with Items.....	284
Name of Report on Form.....	284
Manage CaseWorthy™ Objects.....	287
Unused Forms	287
Active Forms and View Form Location	288

Workflows.....	291
CaseWorthy Object Import	293
Database Backups.....	295
Full HUD CSV Export.....	296
User Login History	297
Slot History	299
Client Viewed By User	300
Who Changed My Client?	302
Form Designer Help Setup	303
Provider / Payee Administration	307
Merge Provider	307
Merge Payees	308
Assessment View Mapping	309
Family Administration	311
Manage Family Members.....	311
Codes and Categories Menu.....	313
Financials/Documents	313
Templates.....	313
Financial Types	317
Financial SubCategory Types	320
Tax Table.....	321
Documents Type.....	324
Roles.....	327
AMI/Poverty	328
Fiscal Calendars.....	330
Mortgage Rates and Factors.....	334
Issues/Health	336
Issues.....	336
Crimes.....	337

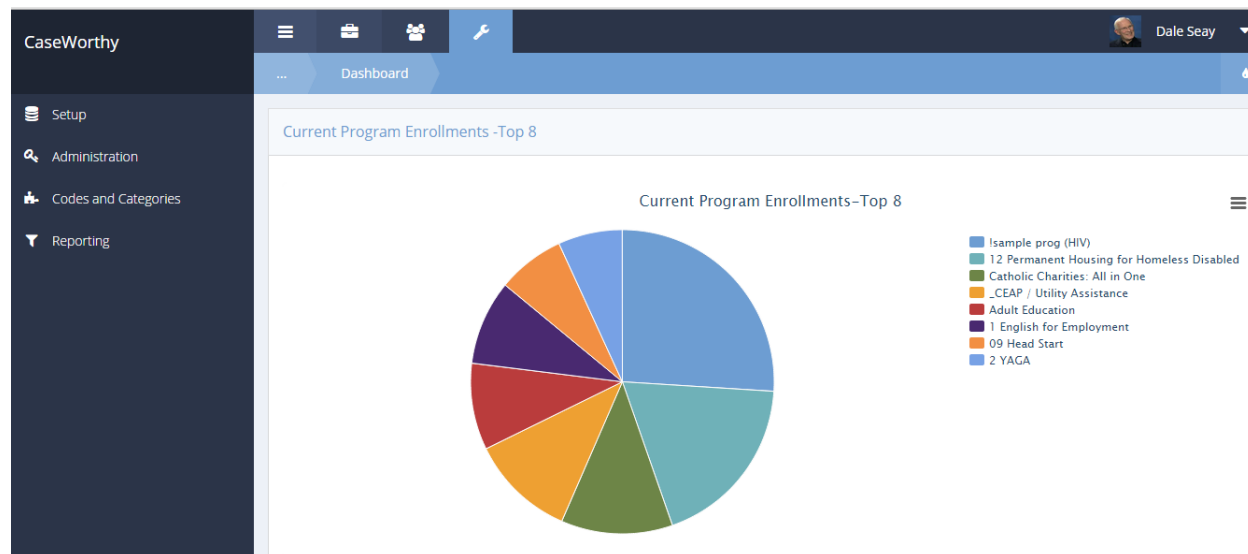
Medications	340
Immunizations	341
Allergies	342
Entity Class Types	343
Goals/Outcomes.....	344
Goals.....	344
Outcomes	347
Goal Steps	351
Grant Management Outcomes	352
Questions	354
Answers	355
Test/Job/Skills.....	357
Tests.....	358
Occupations.....	359
Skills/Credentials	361
Courses.....	364
Job Codes.....	366
Time/Inventory.....	368
Inventory.....	368
Gift Card Inventory.....	371
Time Activity.....	377
Time Location	378
Cost Centers	380
Program Data Management.....	383
Data Quality Tolerance Levels	383
Miscellaneous.....	385
Zip Codes.....	385
Entity Categories.....	387
CoC Jurisdictions	387

Countries	388
Context Types	389
Reporting	391
Reporting Basics	391
Launching a Report	392
Scheduled Reports	398
Download Reports.....	401
Report Style Setup	403
Report Chart Colors.....	405
Report Color Listing.....	407
Operational Reports.....	408
Report Descriptions.....	408
Clients In Program (Render as Pivot)	409
Referrals by Type (Analytics)	410
First Time Served Report	412
Management Summary Report.....	414
Clients Served	416
Service Summary	417
Monthly Service Summary	418
Program Service Summary.....	419
Compliance Reports.....	420
Compliance Area Descriptions	420
CoC APR.....	421
CoC APR 1.0.....	423
CoC APR 5.0.....	424
ESG CAPER	425
HMIS APR	428
PATH.....	429
HIC	431

PIT.....	433
AHAR.....	436
System Wide Performance Measures	441
RHY	445
CoC Application 3B-2.8	446
CSBG.....	447
ROMA.....	448
CEAP	450
SSVF.....	452
HOPWA	453
By-Name List of People Experiencing Homelessness.....	456
SPDAT Enhancements for 2017	458
VI SPDAT Individual.....	459
VI SPDAT TAY.....	460
HUD 9902.....	461
SER	464
ASR.....	466
CC USA	471
Duplicate Client Check	473
Client Data Quality.....	474
Timeliness.....	476
Data Quality Report – HUD HMIS 2014 Data Standards.....	478
CaseWorthy Analytics.....	485
Saved Cube Analytics.....	486
Query Builder.....	489
CaseWorthy Analytics - ApBuilder.....	490
Report History	492
Chronic Homeless List.....	492

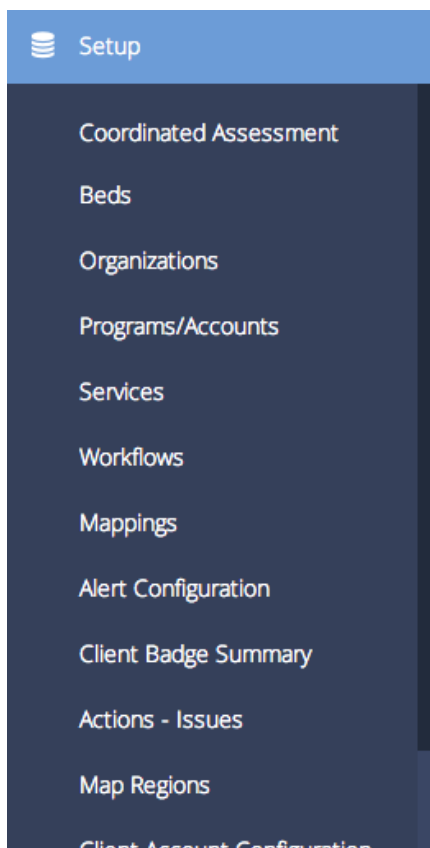
Administration Tab

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.

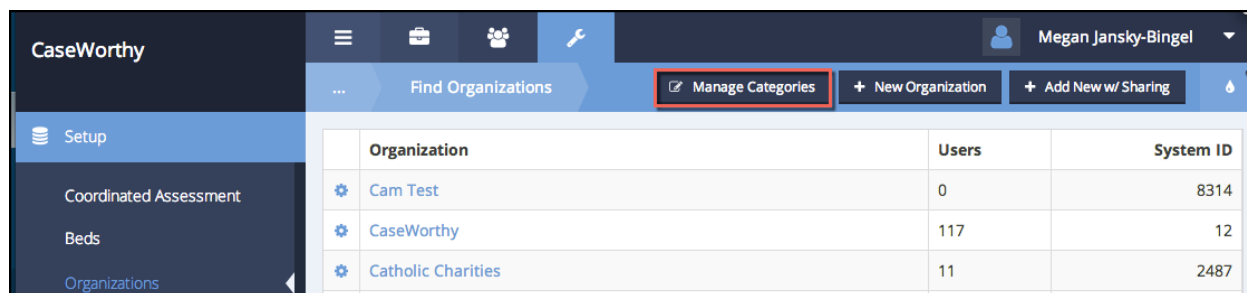


Organizations

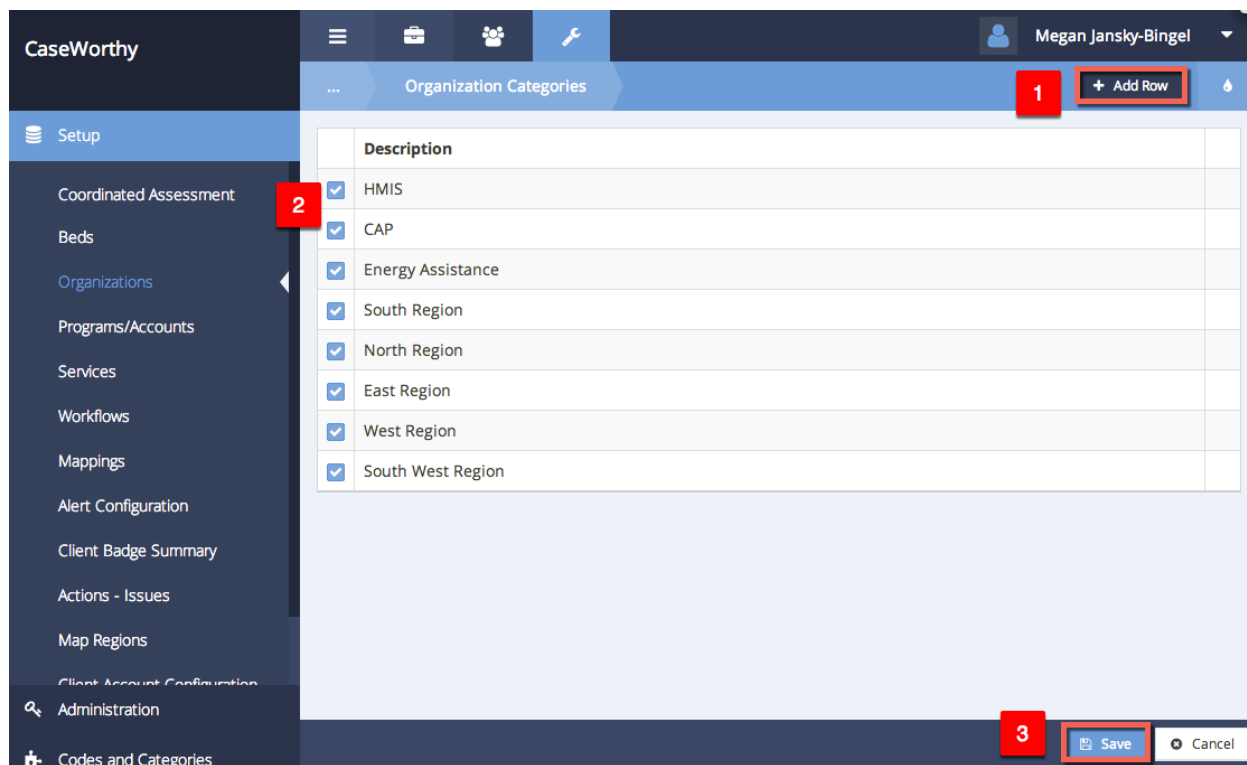
(Administration>Setup>Organizations)

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.

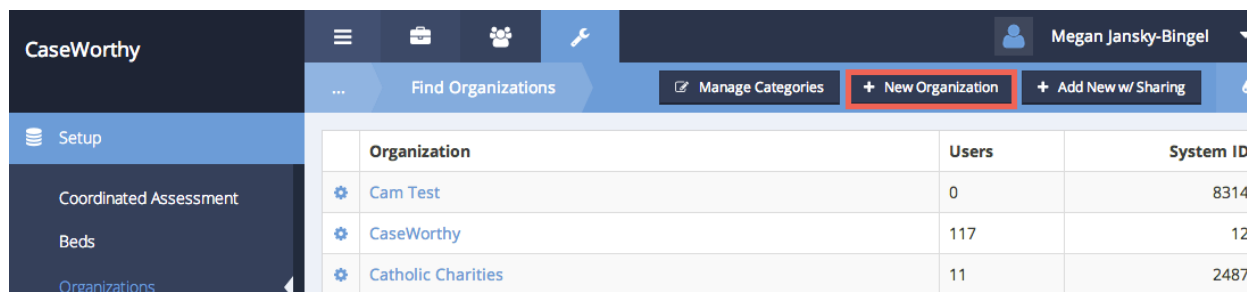
To create or manage categories select the **Manage Categories** button on the top right of the form.




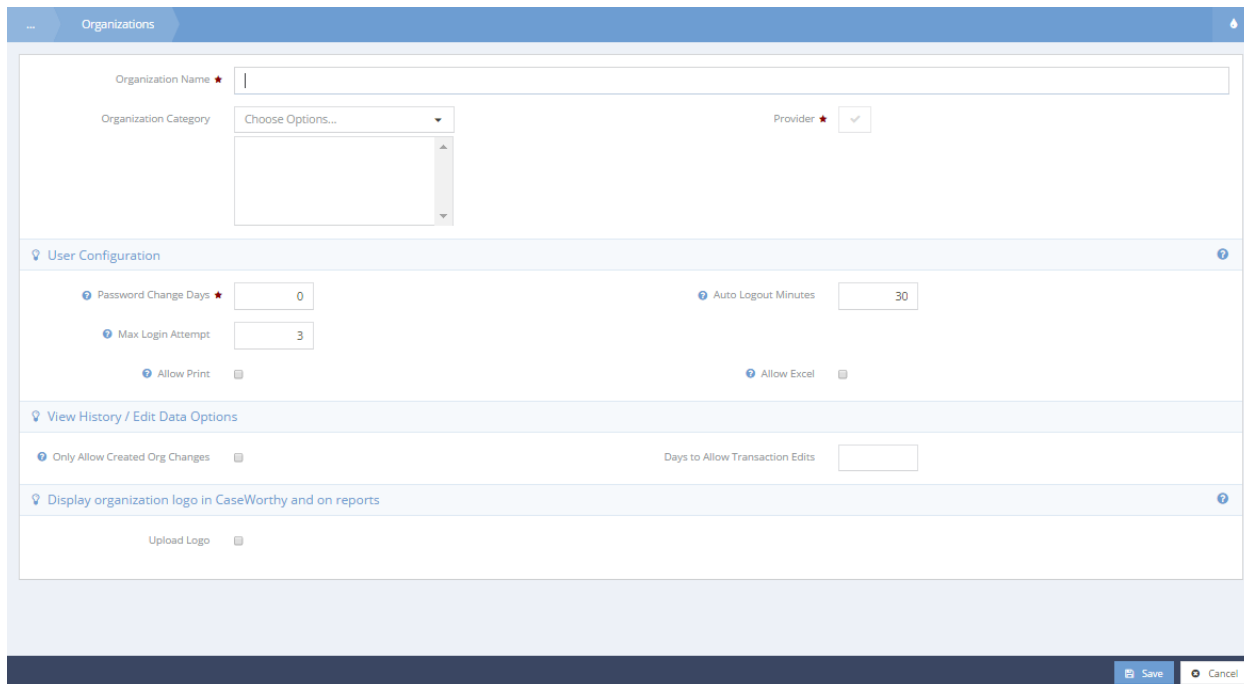
The Organization Categories form appears. Click the **+ Add Row** button to add rows to the form. Enter the desired Category description(s). When all desired Categories have been entered, click the **Save** button on the bottom right side of the form.



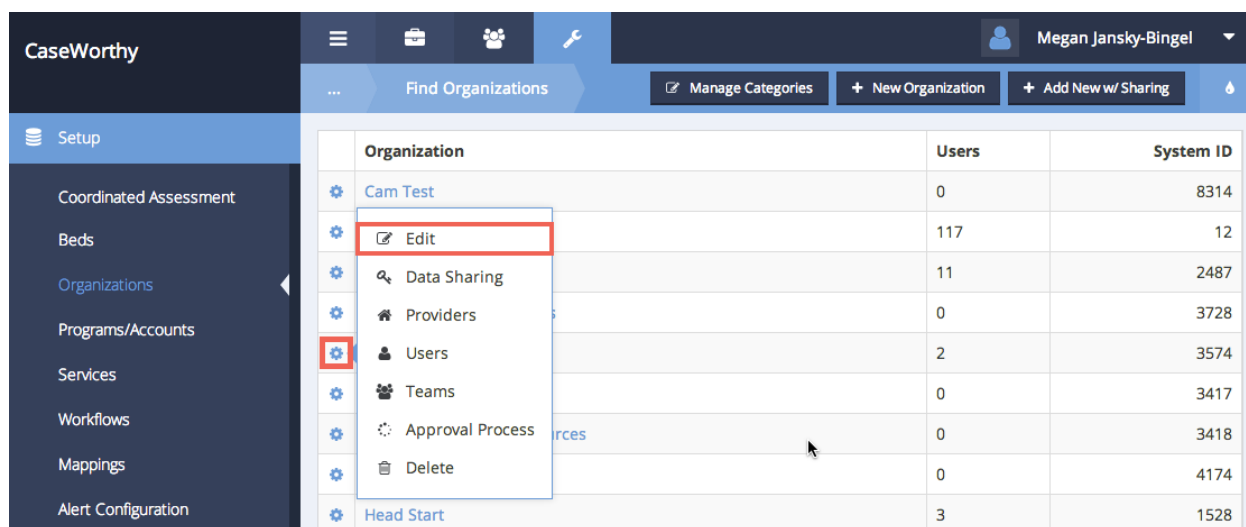
The system navigates back to the Organization summary form. To create a new organization, click the **+ New Organization** button on the top right of the Organization summary form.



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.

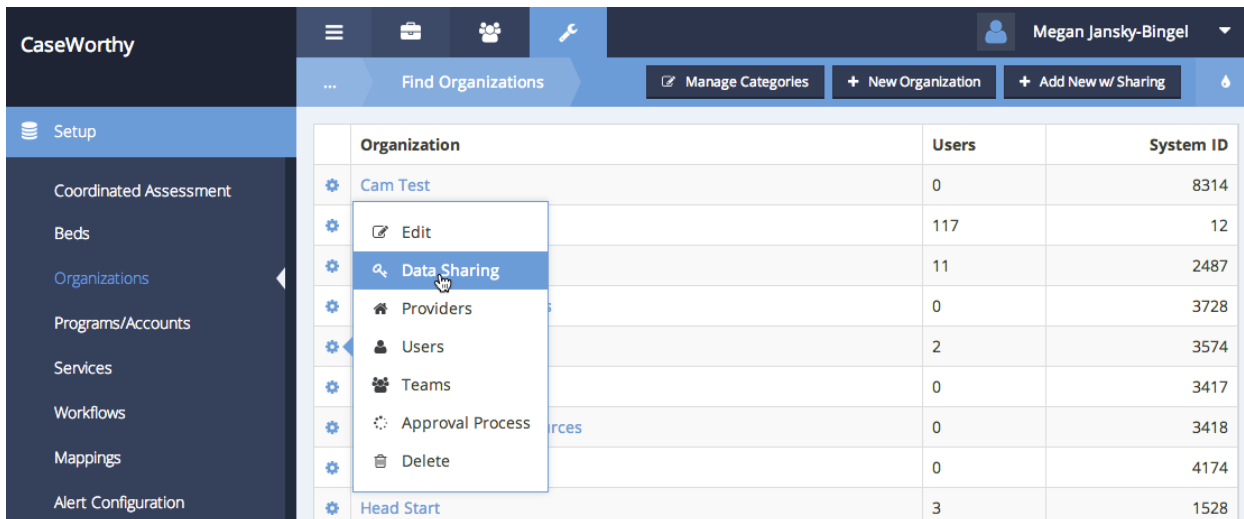


Organization	Users	System ID
Cam Test	0	8314
	117	12
	11	2487
	0	3728
	2	3574
	0	3417
	0	3418
	0	4174
Head Start	3	1528

Data Sharing

(Administration>Setup>Organizations>Data Sharing)

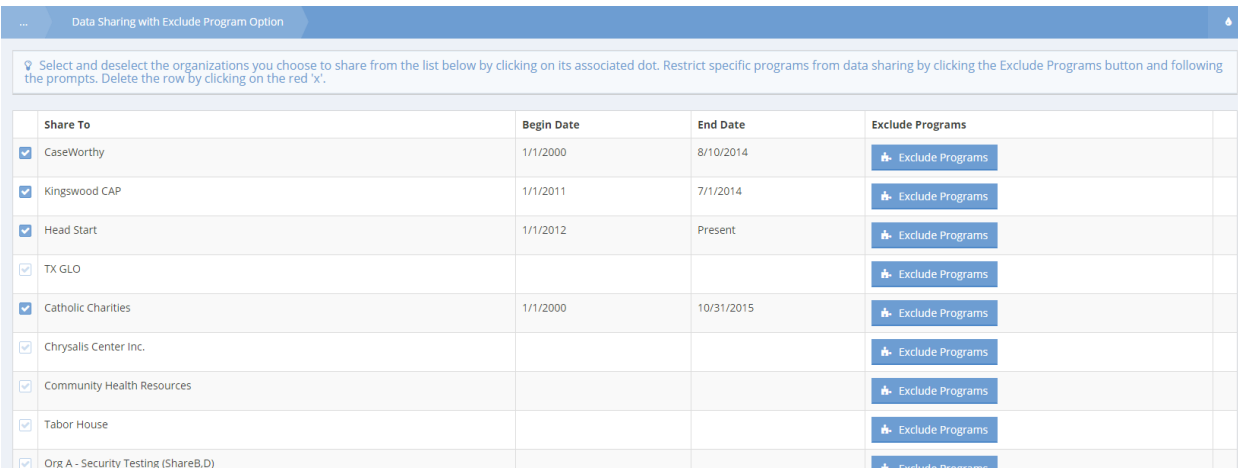
Organizations can opt how to share data with other organizations. To set up sharing, click on the action gear  and select “Data Sharing” from the pop up menu that displays.












The screenshot shows the CaseWorthy interface. On the left is a sidebar with navigation options: Setup, Coordinated Assessment, Beds, Organizations (selected), Programs/Accounts, Services, Workflows, Mappings, and Alert Configuration. The main area displays a table of organizations. A context menu is open for the 'Cam Test' organization, showing options: Edit, Data Sharing (highlighted), Providers, Users, Teams, Approval Process, and Delete. The table has columns: Organization, Users, and System ID.

Organization	Users	System ID
Cam Test	0	8314
	117	12
	11	2487
	0	3728
	2	3574
	0	3417
	0	3418
	0	4174
Head Start	3	1528


The Data Sharing with Exclude Program Option form displays.

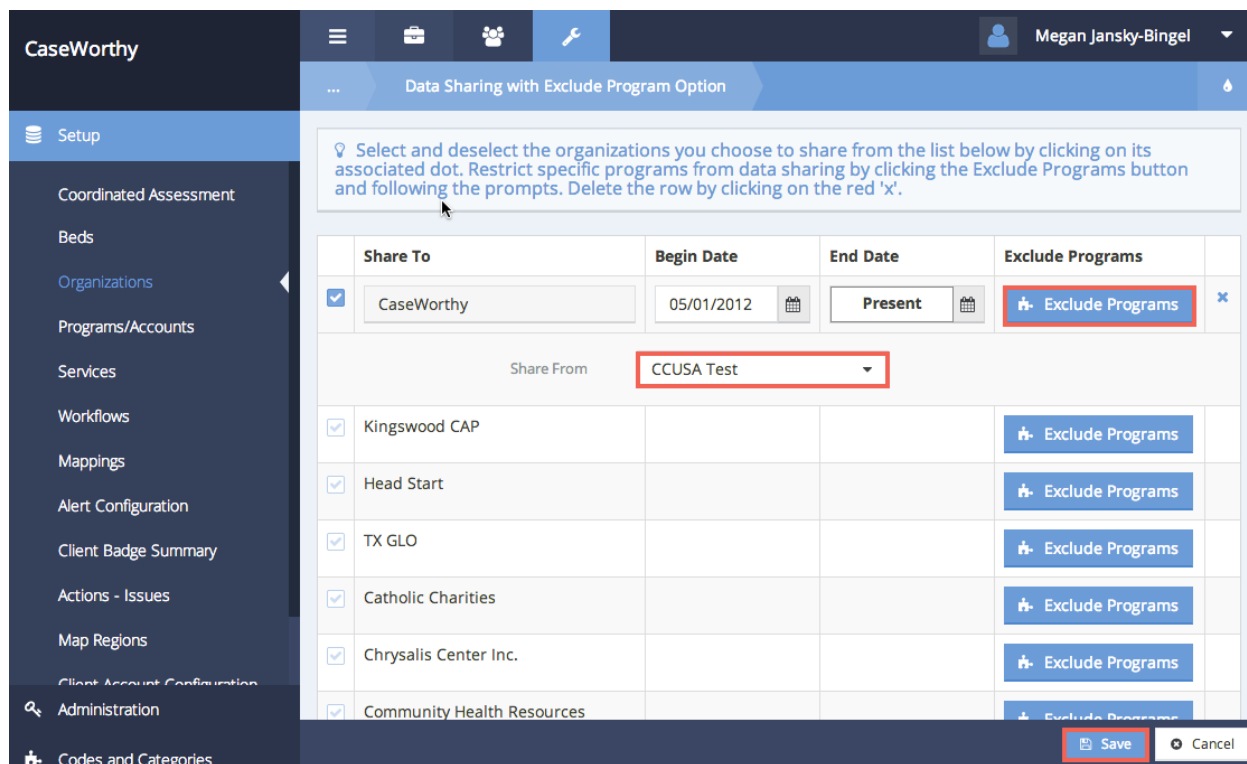


The screenshot shows the 'Data Sharing with Exclude Program Option' form. It includes a header bar with the title and a search icon. Below the header is a instruction box: 'Select and deselect the organizations you choose to share from the list below by clicking on its associated dot. Restrict specific programs from data sharing by clicking the Exclude Programs button and following the prompts. Delete the row by clicking on the red 'x'.' The main table has columns: Share To, Begin Date, End Date, and Exclude Programs. Each row has a checkbox in the 'Share To' column and an 'Exclude Programs' button in the 'Exclude Programs' column.

Share To	Begin Date	End Date	Exclude Programs
<input checked="" type="checkbox"/> CaseWorthy	1/1/2000	8/10/2014	 Exclude Programs
<input checked="" type="checkbox"/> Kingswood CAP	1/1/2011	7/1/2014	 Exclude Programs
<input checked="" type="checkbox"/> Head Start	1/1/2012	Present	 Exclude Programs
<input checked="" type="checkbox"/> TX GLO			 Exclude Programs
<input checked="" type="checkbox"/> Catholic Charities	1/1/2000	10/31/2015	 Exclude Programs
<input checked="" type="checkbox"/> Chrysalis Center Inc.			 Exclude Programs
<input checked="" type="checkbox"/> Community Health Resources			 Exclude Programs
<input checked="" type="checkbox"/> Tabor House			 Exclude Programs
<input checked="" type="checkbox"/> Org A - Security Testing (ShareB.D)			 Exclude Programs

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.



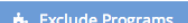
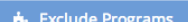
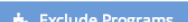
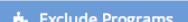
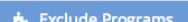

If the organization wants to create certain program exceptions, such as those dealing with domestic violence issues, HIV/AIDS, Immigration, or other programs that deal with sensitive client information, use the  button to identify programs that should not be included in the sharing of data.





CaseWorthy

... Data Sharing with Exclude Program Option

Select and deselect the organizations you choose to share from the list below by clicking on its associated dot. Restrict specific programs from data sharing by clicking the Exclude Programs button and following the prompts. Delete the row by clicking on the red 'x'.

	Share To	Begin Date	End Date	Exclude Programs	
<input checked="" type="checkbox"/>	CaseWorthy	05/01/2012	Present		
Share From: CCUSA Test					
<input checked="" type="checkbox"/>	Kingswood CAP				
<input checked="" type="checkbox"/>	Head Start				
<input checked="" type="checkbox"/>	TX GLO				
<input checked="" type="checkbox"/>	Catholic Charities				
<input checked="" type="checkbox"/>	Chrysalis Center Inc.				
<input checked="" type="checkbox"/>	Community Health Resources				


 

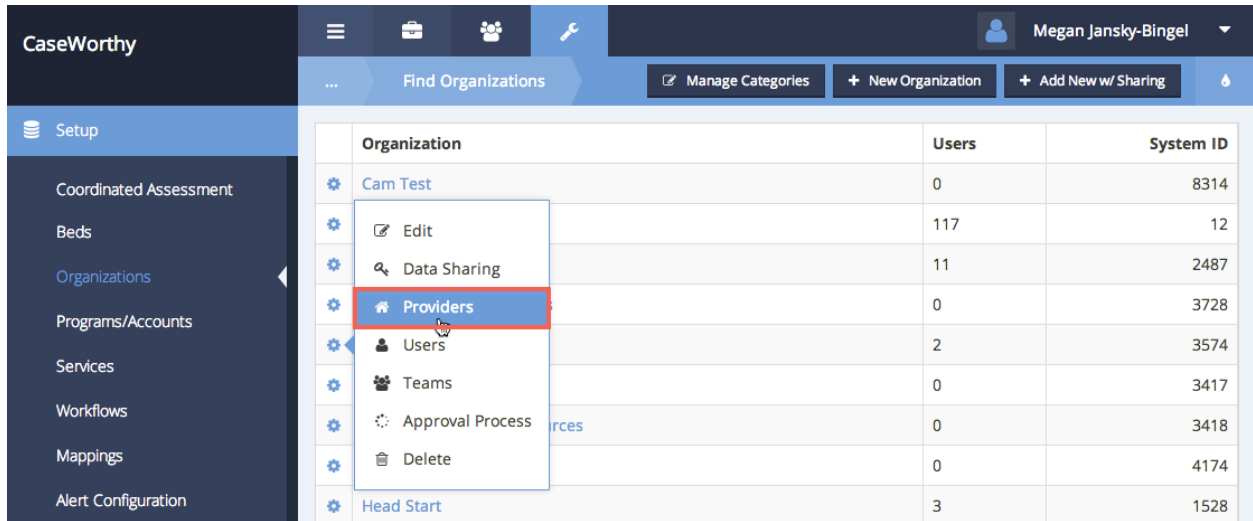
Click the  button on the bottom right of the form when finished.

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.

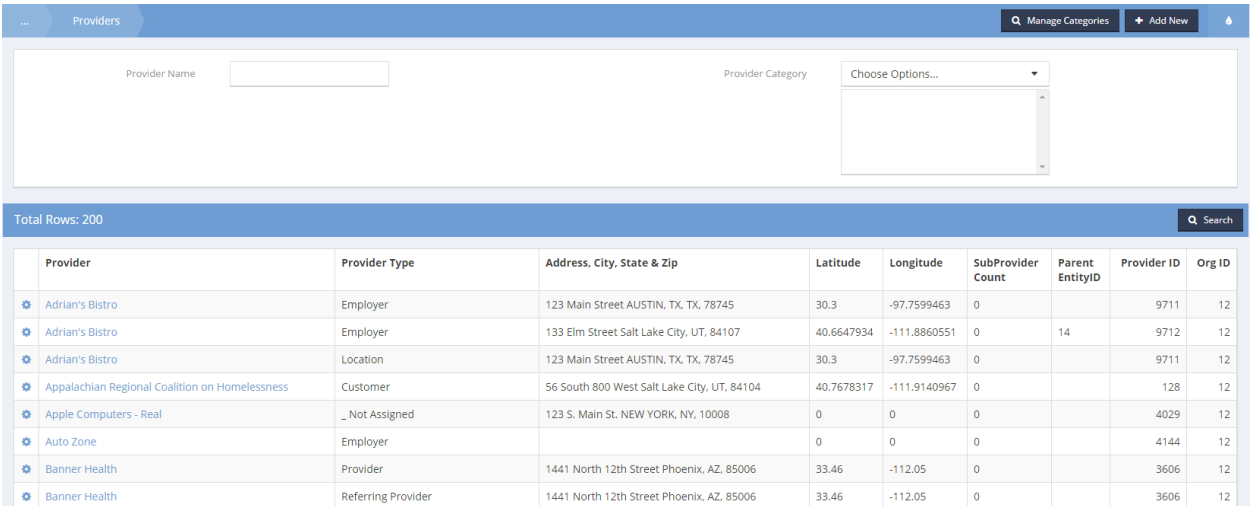
From the Organization summary form, click on the desired organization's action gear  and select "Providers" from the pop up menu that displays.



The screenshot shows the CaseWorthy interface. On the left is a sidebar with navigation options: Setup, Coordinated Assessment, Beds, Organizations (selected), Programs/Accounts, Services, Workflows, Mappings, and Alert Configuration. The main area displays a table of organizations. The 'Cam Test' organization is selected, and its action menu is open, showing options: Edit, Data Sharing, Providers (highlighted with a red box and a cursor), Users, Teams, Approval Process, and Delete. The table has columns: Organization, Users, and System ID.

Organization	Users	System ID
Cam Test	0	8314
	117	12
	11	2487
	0	3728
	2	3574
	0	3417
	0	3418
	0	4174
Head Start	3	1528

The Providers summary form displays a list of providers.



The screenshot shows the Providers summary form. At the top, there are search filters: Provider Name, Provider Category, and a dropdown menu labeled 'Choose Options...'. Below the filters, it says 'Total Rows: 200'. A table lists the providers with columns: Provider, Provider Type, Address, City, State & Zip, Latitude, Longitude, SubProvider Count, Parent EntityID, Provider ID, and Org ID.

Provider	Provider Type	Address, City, State & Zip	Latitude	Longitude	SubProvider Count	Parent EntityID	Provider ID	Org ID
Adrian's Bistro	Employer	123 Main Street AUSTIN, TX, 78745	30.3	-97.7599463	0		9711	12
Adrian's Bistro	Employer	133 Elm Street Salt Lake City, UT, 84107	40.6647934	-111.8860551	0	14	9712	12
Adrian's Bistro	Location	123 Main Street AUSTIN, TX, 78745	30.3	-97.7599463	0		9711	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
Banner Health	Referring Provider	1441 North 12th Street Phoenix, AZ, 85006	33.46	-112.05	0		3606	12

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 screenshot shows the CaseWorthy system interface. On the left is a dark blue sidebar with a 'Setup' menu containing 'Coordinated Assessment', 'Beds', 'Organizations', 'Programs/Accounts', 'Services', 'Workflows', and 'Mappings'. The main area is titled 'Providers'. In the top right of this area, there is a 'Manage Categories' button with a magnifying glass icon, which is highlighted with a red box. Next to it is a '+ Add New' button. Below these buttons is a form with a 'Provider Name' text field and a 'Provider Category' dropdown menu labeled 'Choose Options...'. At the bottom of the form, there is a table with 10 columns: Provider, Provider Type, Address, City, State & Zip, Phone, Latitude, Longitude, SubProvider Count, Parent EntityID, and System ID. Above the table, it says 'Total Rows: 13' and there is a 'Search' button.

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

The screenshot shows the 'Provider Category' form. At the top, there is a '+ Add Row' button. Below it, a blue bar indicates 'Total Rows: 65'. The main part of the form is a table with the following data:

Description	Category ID	Modified by User
<input checked="" type="checkbox"/> _ Not Assigned	42	Jane1
<input checked="" type="checkbox"/> Admin Agency	8	DaveE
<input checked="" type="checkbox"/> Background Analysis	1017	Administrator
<input checked="" type="checkbox"/> CC Camp	1013	Administrator
<input checked="" type="checkbox"/> CC Community Gardens	36	meg
<input checked="" type="checkbox"/> CC Congregate Dining	38	meg
<input checked="" type="checkbox"/> CC Family/Community Center	1015	Administrator
<input checked="" type="checkbox"/> CC Food Banks/Pantries/Cupboards	34	meg
<input checked="" type="checkbox"/> CC Other Food Dist Service providers	35	meg
<input checked="" type="checkbox"/> CC Senior Center	1014	Administrator

A new, expanded row appears.

The screenshot shows the 'Provider Category' form with a new, expanded row added at the bottom. The row has three main input fields: 'Description' (with a dropdown arrow), 'Category ID' (with a dropdown arrow), and 'Modified by User' (with a dropdown arrow). There is a small 'x' icon in the bottom right corner of the row.

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.

The screenshot shows the CaseWorthy Providers summary form. The top navigation bar includes the CaseWorthy logo, a menu icon, and a user profile for Megan Jansky-Bingel. The main header area shows the 'Providers' tab, a search bar for 'Manage Categories', and a '+ Add New' button. The left sidebar contains a list of navigation options: Setup, Coordinated Assessment, Beds, Organizations, Programs/Accounts, Services, Workflows, and Mappings. The main content area displays a form for adding a new provider, with fields for 'Provider Name' and 'Provider Category'. Below the form, a table shows a list of providers with columns: Provider, Provider Type, Address, City, State & Zip, Phone, Latitude, Longitude, SubProvider Count, Parent EntityID, and System ID. The table indicates 'Total Rows: 13'.

Provider	Provider Type	Address, City, State & Zip	Phone	Latitude	Longitude	SubProvider Count	Parent EntityID	System ID

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

The Add/Edit Provider form displays.

...
Add/Edit Provider

Provider Name and Category

Provider Name *
Categories *
Choose Options...
Not Assigned
Make Default Provider
Master Provider

Provider Location

Address
Address 2
Zip Code
City, State
County/Neighborhood
Longitude
Latitude
Geo Code
Verify Address

Please enter additional provider contact information below.

Phone
Fax
Email
Website URL
Confirm Email
Default AMI *
Federal United States - 2011
Default AMI Metro

Insurance Provider Data

NPI

HMIS Data Elements

COC Code
Principle Site

Corporation and Tax Information

Tax Classification
State ID
W-9 On File
Minority Status
All
None
Choose Options...
Terms

Save
Cancel

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.

CaseWorthy

Megan Jansky-Bingel

Providers

Q Manage Categories + Add New

Provider Name

Provider Category Choose Options...

Total Rows: 156

Q Search

Provider	Provider Type	Address, City, State & Zip	Phone	Latitude	Longitude	SubProvider Count	Parent EntityID	System ID
Appalachian Regional Coalition on Homelessness	Customer	56 South 800 West Salt Lake City, UT, 84104		40.7678317	-111.9140967	0		128
Apple Computers - Real	_ Not Assigned	123 S. Main St. NEW YORK, NY, 10008		0	0	0		4029
Auto Zone	Employer			0	0	0		4144
Banner Health	Provider	1441 North 12th Street Phoenix, AZ, 85006	345-345-3453	33.46	-112.05	0		3606
Brazos Valley Community Action Group	Customer	123 South Main Street SALT LAKE CITY, UT, 84107		0	0	0		120
Caitlin's Cupboard	_ Not Assigned			0	0	0		2569
Camille's Congregate Dining	_ Not Assigned			0	0	0		2564
Camrone Funding	_ Not Assigned	1258 Highway 7 Schenectady, NY, 12306		42.78	-73.96	0		4096
CAPAI Idaho	Customer			0	0	0		4135
Cardinal Solutions Group	Employer	1234 RALEIGH, NC, 27605		0	0	0		4443
Cardinal Solutions	Employer	1490 West North Temple Salt Lake City, UT, 84116		40.77	-111.93	0		4133

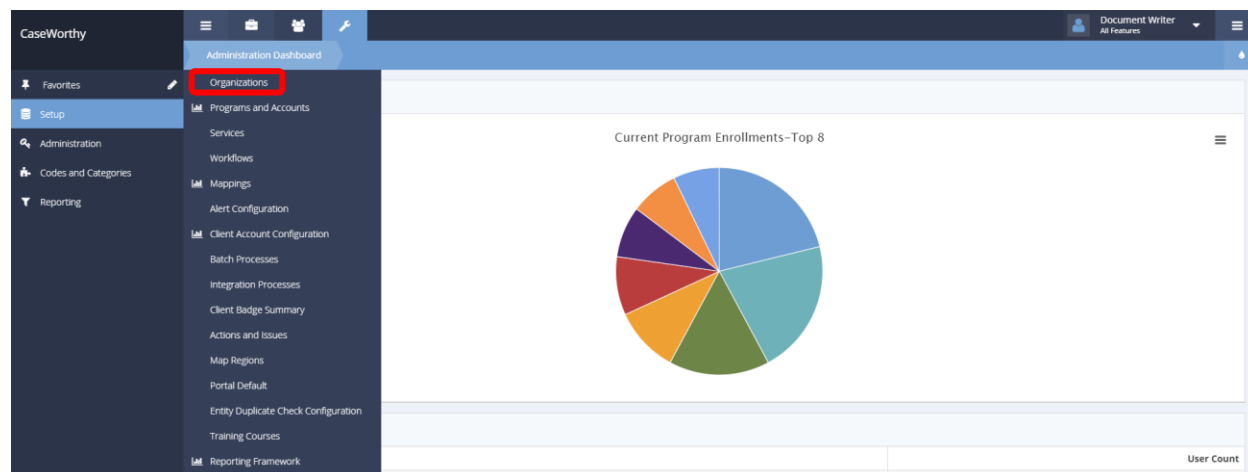
Done

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

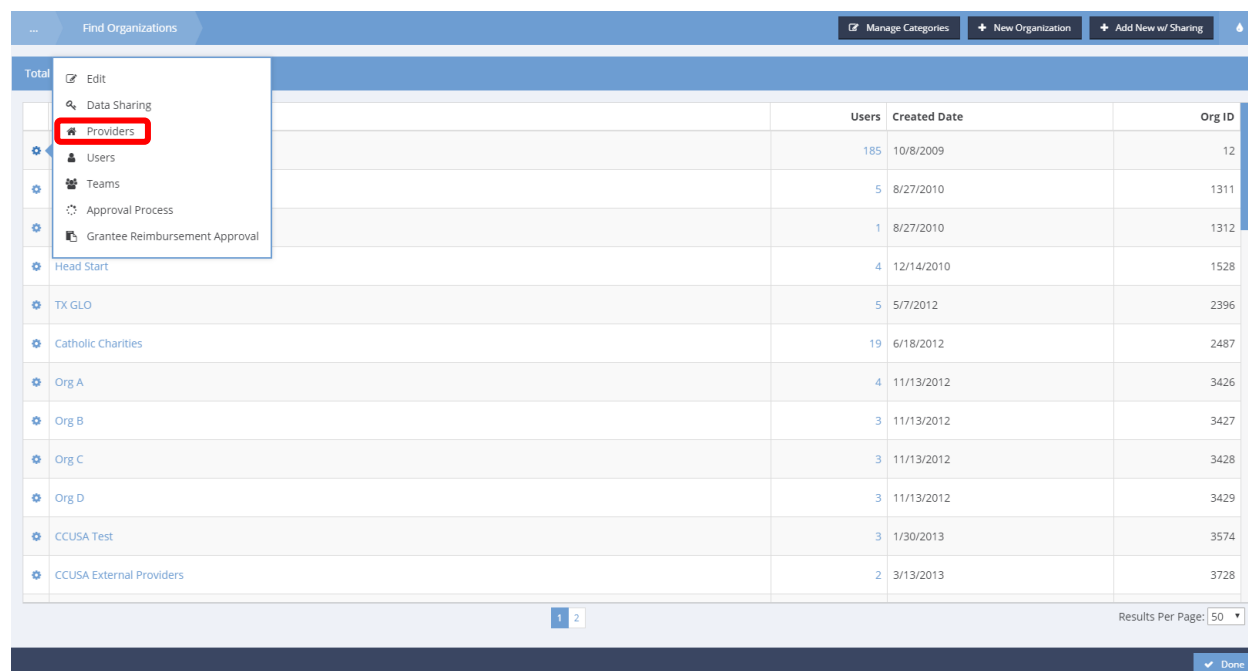
Resource Usage Manage Facility

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.

Providers CaseWorthy Manage Categories Add New

Filters

Provider Name


Provider Category Choose Options...

Total Rows: 948 Search

Edit Resources Inspections Program Provider Services Scan Card Services Provider Release Provider Contacts Property Contracts Provider Rates School Calendar Zip Codes

	Provider Type	Address, City, State & Zip	Latitude	Longitude	Provider ID	Org ID
	Landlord	740 East 3900 South Salt Lake City, UT, 84107	40.6867288	-111.8702343	14	12
	Landlord	123 South Saint Louis, MO, 63128	0	0	2619	12
	Landlord	77 West 1300 South Salt Lake City, UT, 84115	40.74	-111.89	3882	12
	Landlord		0	0	8047	12
	School	740 East 3900 South Salt Lake City, UT, 84107	40.6867288	-111.8702343	14	12
	School		0	0	9667	12
	School		0	0	9668	12

First 1 2 3 4 5 Last Results Per Page: 50 Done

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.

Resources Add Resource

Filters


Category

Resource Name

Total Rows: 67 Search

	Category	Resource Name	Units / Slots	Capacity	Resource ID
	Volunteer Events	Cake Decorating		0	2498
	Encounter	Keiki Field Trip		123	2509
	Event - In / Out	Day Care Rooms		35	2515
	Meals on Wheels Event	Test Facility		50	2516
	Manage Facility	Test Facility		50	2517
	Work Therapy / Chores	Kitchen		50	2523
	Work Therapy / Chores	Laundromat		25	2524
	Housing Emergency	Demo Building 1	Slots	50	2527
	Classroom	Locker Test	Slots	25	2560
	Housing	Matt Test	Slots	10	2566

1 2 Results Per Page: 50 Done

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.

⚙	Meals on Wheels Event	Test Facility			50	2516
⚙	Meals on Wheels Event	Meals on Wheels			500	1223
⚙	⚙ Edit	Workshop 1 test	Slots		50	1254
⚙	🗑 Manage Facility	Workshop 2 test	Slots		50	1255
⚙	🔒 Lockers	Kitchen			50	2523
⚙	🚗 Parking	Laundromat			25	2524
⚙	🗑 Delete	Test Facility			50	2517

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

... Resource Usage Event
+ Manage Categories
+ Add Usage

Filters

Usage Name
Start Date
End Date


Total Rows: 3
Search

	Usage Name	Start Date	End Date	Enrolled Today
⚙	Test Facility	5/1/2017	Open	0
⚙	Facility Management	5/12/2017	Open	0
⚙	Prod Test Usage	7/13/2017	Open	0

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

Total Rows: 3
Search

	Usage Name	Start Date	End Date	Enrolled Today
⚙	Test Facility	5/1/2017	Open	0
⚙	⚙ Edit	5/12/2017	Open	0
⚙	🗑 Delete Usage	7/13/2017	Open	0
⚙	Prod Test Usage			

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.

Add Resource Usage Event

Event Name *

Categories

Start Date * 07/17/2017

End Date * Open

Allow Males (Age 18+) ☒

Allow Females (Age 18+) ☒

Allowable Clients and Accessibility

Allow Children ☐

Handicap Accessible ☐

Allow Children Age

Enrollment Information

Enrollment Type

Enroll in Program

Automatic Enrollment ☐

Enrollment Required ☐

Attendance Service *

Multiple Services Per Event ☐

Recurrence Start/End times must be in military time i.e. 12 midnight is 00:00, 1 pm is 13:00. Single-digit times must have a leading zero, i.e. 9 am is 09:00.

Recurrence * ☒ Daily ☐ Weekly ☐ BiWeekly (every two weeks) ☐ Monthly ☐ Semi Monthly (twice monthly) ☐ Annually ☐ BiMonthly ☐ Semi Annually ☐ Other

Day	# Slots	Slot Duration	Slot Start Time	Max Units In Slot	Slot Times Modified	Edit Slots
Everyday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

Max Capacity * 0

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.

Enrollment Information

Enrollment Type

Enroll in Program

Automatic Enrollment ☐

Enrollment Required ☐

Multiple Services Per Event ☒

Service *

Click the button 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.

... Find Organizations Manage Categories + New

Total Rows: 26

		Users	Created Date
	Data Sharing		
	Providers	204	10/8/2009
	Users	16	6/18/2012
	Secured Users	2	3/13/2013
	Teams	2	1/30/2013
	Approval Process	2	7/26/2015
	Clear Brook High School	2	7/26/2015
	Clear Springs High School	1	7/26/2015
	Communities in Schools	0	7/26/2015
	Dale Housing Testing	0	6/29/2015
	Dallas Area Affiliate	1	7/27/2015
	Dallas School - 01	1	7/27/2015

The Providers form displays.

... Providers Manage Categories + Add New 🔍

Provider Name

Provider Category Choose Options...

- Absence Request Approval Location
- Employer
- Front Desk
- HCS Agency

Total Rows: 4 Search

	Provider	Provider Type	Address, City, State & Zip	Latitude	Longitude	Provider ID	Org ID
	Catholic Charities	HCS Agency	123 South Main Street Salt Lake City, UT, 84111	40.7664825	-111.8909977	2488	2487
	Catholic Charities	Provider	123 South Main Street Salt Lake City, UT, 84111	40.7664825	-111.8909977	2488	2487
	Catholic Charities	Volunteer	123 South Main Street Salt Lake City, UT, 84111	40.7664825	-111.8909977	2488	2487
	Provider B	Provider	123 Sunnyside Road B SCHENECTADY, NY, 12345	0	0	4337	2487

Done

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

Select Resources from the menu options.


The screenshot shows the 'Providers' menu in the system. A dropdown menu is open, and the 'Resources' option is highlighted with a red box. Other options in the dropdown include Edit, Inspections, Program, Provider Services, Scan Card Services, Provider Release, Provider Contacts, Property, Contracts, Provider Rates, and School Calendar. The background shows a table with provider information.

Provider Type	Address, City, State & Zip	Latitude	Longitude
HCS Agency	123 South Main Street Salt Lake City, UT, 84111	40.7664825	-111.8883404
Provider	123 South Main Street Salt Lake City, UT, 84111	40.7664825	-111.8883404
Volunteer	123 South Main Street Salt Lake City, UT, 84111	40.7664825	-111.8883404
Provider	123 Sunnyside Road B SCHENECTADY, NY, 12345	42.904773	-73.799438

The Resources form displays.

The screenshot shows the 'Resources' form. At the top, there is a 'Category' dropdown and a 'Resource Name' search field. Below this, a table displays 8 rows of resource information. The table has columns for Category, Resource Name, Units / Slots, Capacity, and Resource ID. A 'Done' button is located at the bottom right of the form.

Category	Resource Name	Units / Slots	Capacity	Resource ID
Classroom	Day Care		30	76
Classroom	Group Education Sessions		100	1157
Housing Emergency	Catholic Charity Housing		50	1124
Events	CC Event		0	1125
Events	Jane Event		0	1126
Events	CC Events CC		0	1127
Events	Test Copy Usage		0	1128
Scattered Site Housing	Doc's		20	1209

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

Resources

Category Resource Name

Total Rows: 8

	Category	Resource Name	Units / Slots
⚙	Classroom	Day Care	
⚙	Classroom	Group Education Sessions	
⚙	Housing Emergency	Catholic Charity Housing	
⚙	✎ Edit	CC Event	
⚙	🏠 Site Designer	Jane Event	
⚙	🔒 Lockers	CC Events CC	
⚙	🚗 Parking	Test Copy Usage	
⚙	🗑 Delete	Doc's	

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

Adrian's Bistro House

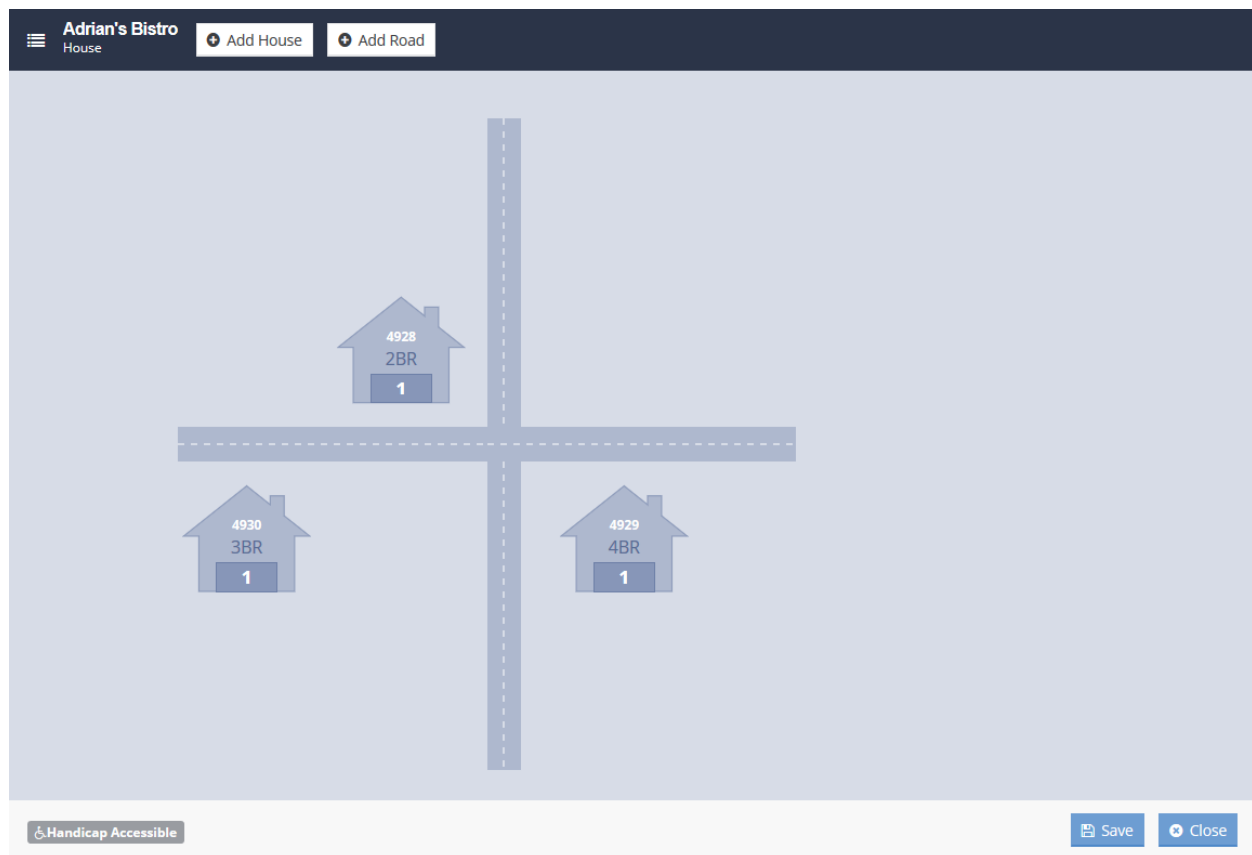
➕ Add House ➕ Add Road

🏠 Handicap Accessible

💾 Save 🔒 Close

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.

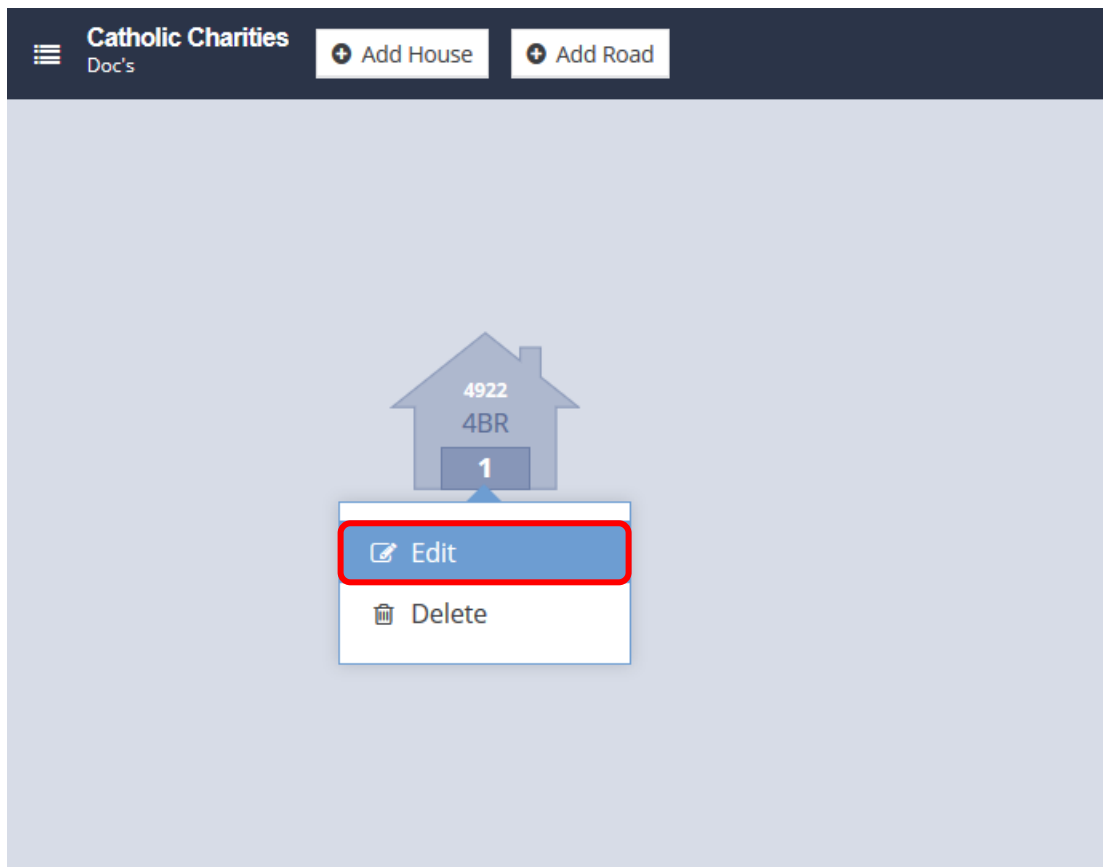


To delete or extend a road, click the desired road and select from the menu options.

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 existing 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.

Edit Resource Usage CheckIn Manager

Resource Name: Resource Category:

Site Setup Information

Site Label (8 characters): Site Type:

Site Name:

Site Attributes

Start Date: End Date:

Site Capacity:

Target Population: Site Status:

Allowable Clients and Accessibility

Allow Males (Age 18+): ☒ Allow Females (Age 18+): ☒

Allow Children: ☒ Handicap Accessible: ☐

Allow Children Age:

Slot Assignment Method: Slot Assign Event:

These fields are used to calculate available beds and units on the AHAR

Available Units: Available Beds:

Enrollment Information

Attendee Lookup Form ID:

Enrollment Type:

Automatic Enrollment: ☐ Enrollment Required: ☐

Use day(s) as Service Units: ☒

Enrollment Service: Attendance Service:

If "Automatic Check-in" is selected, enrolled clients will automatically be re-checked in at each defined interval indicated in the recurrence. If "Include Dates Between" is checked, when clients are checked in, they will be checked in from the date of the selected check-in until the date of the next scheduled check-in interval.

Automatic Check-in: ☐ Include Dates Between: ☒

Site Location

Location: ContextTypeID:

Address:

Provider Longitude: Provider Latitude:


Junction Entity ID: Junction Context ID:

Recurrence Start/End times must be in military time i.e. 12 midnight is 00:00, 1 pm is 13:00. Single-digit times must have a leading zero, i.e. 9 am is 09:00.

Recurrence: ☒ Daily ☐ Weekly ☐ Monthly ☐ Semi Monthly ☐ Annually

Day	Start	End	All Day
1st	00:00	00:00	<input checked="" type="checkbox"/> All Day

Enter information into required fields: Site Name, Start Date, End Date, Site Capacity, Allow Children Age, Slot Assignment Method, Slot Assignment Event, Attendance 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.

Edit ✕


Edit Resource Usage Checkin Manager ⬆

💡 If "Automatic Check-In" is selected, enrolled clients will automatically be re-checked in at each defined interval indicated in the recurrence. If "Include Dates Between" is checked, when clients are checked in, they will be checked in from the date of the selected check-in until the date of the next scheduled check-in interval.

Automatic Check-In ☐

Include Dates Between ☒

💡 Site Location

Location 

ContextTypeID

Address

Provider Longitude

Provider Latitude

Junction Entity ID

💾 Save ✕ Cancel

The Select Provider form displays.

Select Provider Lookup

Select Provider




Provider Name

Address, City, State Zip

Total Rows: 2

Search

Provider Name	Address, City, State Zip
CaseWorthy	740 East 3900 South, Salt Lake City, UT, UT
Catholic Charities	123 South Main Street, Salt Lake City, UT

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  button to save and exit. The Scattered Site Housing Designer form displays once again. Click the  button to save. Click the  button when finished.

Provider Mailing Address


(Administration>Setup>Organizations>Providers)

Providers CaseWorthy Manage Categories Add New

Provider Name Provider Category Choose Options...

Total Rows: 225 Search

	Provider	Provider Type	Address, City, State & Zip	Latitude	Longitude	SubProvider Count	Parent Entity ID	Provider ID	Org ID
⚙	Adrian's Bistro	Client Created Business	123 South Main Street SALT LAKE CITY, UT, UT, 84101	40.7664825	-111.8909977	0	9865	9711	12
⚙		Donors	123 South Main Street SALT LAKE CITY, UT, UT, 84101	40.7664825	-111.8909977	0	9865	9711	12
⚙		Employer	123 South Main Street SALT LAKE CITY, UT, UT, 84101	40.7664825	-111.8909977	0	9865	9711	12
⚙		Provider	123 South Main Street SALT LAKE CITY, UT, UT, 84101	40.7664825	-111.8909977	0	9865	9711	12
⚙	Adrian on Homelessness	Customer	321 West Walnut Street Johnson City, TN, 37604	36.31	-82.35	0		128	12
⚙		Employer	5 West 31st Street New York, NY, 10001	40.7469289	-73.9864213	0		4029	12
⚙		Employer	145 South Main Street Salt Lake City, UT, 84111	40.7660267	-111.8909962	0		4144	12
⚙		Foster Care	1441 North 12th Street PHOENIX, AZ, 85006	33.46	-112.05	0		3606	12
⚙		Provider	1441 North 12th Street PHOENIX, AZ, 85006	33.46	-112.05	0		3606	12
⚙		Provider Release	1441 North 12th Street PHOENIX, AZ, 85006	33.46	-112.05	0		3606	12
⚙		Employer	211 East Ocean Boulevard Long Beach, CA, 90802	33.7676076	-118.1907511	0		10012	12
⚙		Insurance - Other	123456 Main Schenectady, NY, 12303	42.799267	-73.9435	2		9865	12
⚙	Blue Cross Blue Shield	Master Provider	123456 Main Schenectady, NY, 12303	42.799267	-73.9435	2		9865	12

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

Add/Edit Provider

Provider Name and Category

Provider Name * Adrian's Bistro Make Default Provider ☐

Categories * Choose Options... Master Provider CaseWorthy

Client Created Business
Donors
Employer
Provider

Provider Location

Address 123 South Main Street Address 2

Zip Code 84101

City Salt Lake City State UT

County/Neighborhood / Downtown

Longitude -111.8909977 Latitude 40.7664825


Geo Code Use Physical Address as Mailing Address ☒

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

Longitude Latitude

Geo Code Use Physical Address as Mailing Address ☐

Add Mailing Address

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

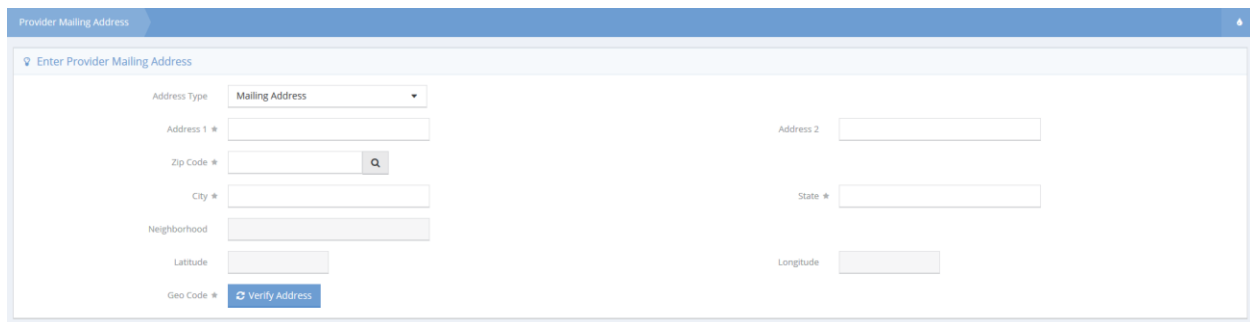
Address Summary by Provider Lookup

Address Summary by Provider

Address Type	Street Address	City	State	Zip Code	Begin Date	End Date
--------------	----------------	------	-------	----------	------------	----------

Click the button.

The Provider Mailing Address form displays.



The screenshot shows a web form titled "Provider Mailing Address" with a sub-header "Enter Provider Mailing Address". The form contains the following fields and controls:

- Address Type:** A dropdown menu currently set to "Mailing Address".
- Address 1 *:** A text input field.
- Address 2:** A text input field.
- Zip Code *:** A text input field with a search icon (magnifying glass) to its right.
- City *:** A text input field.
- State *:** A text input field.
- Neighborhood:** A text input field.
- Latitude:** A text input field.
- Longitude:** A text input field.
- Geo Code *:** A text input field.
- Verify Address:** A blue button with a circular arrow icon and the text "Verify Address".
- Save:** A blue button with a floppy disk icon and the text "Save".

Enter an address, zip code, city, and State. Click the [Verify Address](#) button and select the correct address in the pop up window. Click the [Save](#) button when finished.

Provider Inspections

(Administration>Setup>Organizations>Providers)

Providers CaseWorthy Manage Categories Add New

Provider Name Provider Category

Total Rows: 225 Search

	Provider	Provider Type	Address, City, State & Zip	Latitude	Longitude	SubProvider Count	Parent Entity ID	Provider ID	Org ID
⚙	Appalachian Regional Coalition on Homelessness	Customer	321 West Walnut Street Johnson City, TN, 37604	36.31	-82.35	0		128	12
⚙	✎ Edit	Employer	5 West 31st Street New York, NY, 10001	40.7469289	-73.9864213	0		4029	12
⚙	\$ Provider Rates	Employer	145 South Main Street Salt Lake City, UT, 84111	40.7660267	-111.8909962	0		4144	12
⚙	📁 Resources	Foster Care	1441 North 12th Street PHOENIX, AZ, 85006	33.46	-112.05	0		3606	12
⚙	🔍 Inspections	Provider	1441 North 12th Street PHOENIX, AZ, 85006	33.46	-112.05	0		3606	12
⚙	📅 Program	Provider Release	1441 North 12th Street PHOENIX, AZ, 85006	33.46	-112.05	0		3606	12
⚙	👤 Services	Employer	211 East Ocean Boulevard Long Beach, CA, 90802	33.7676076	-118.1907511	0		10012	12
⚙	📄 Scan Card Services	Insurance - Other	123456 Main Schenectady, NY, 12303	42.799267	-73.9435	2		9865	12
⚙	🔒 Provider Release	Master Provider	123456 Main Schenectady, NY, 12303	42.799267	-73.9435	2		9865	12
⚙	👤 Provider Contacts	Customer	1500 University Drive East College Station, TX, 77840	30.63	-96.31	0		120	12
⚙	🏠 Property	_ Not Assigned	2468 New Hampshire Ave Concord, NH, 03303	43.2848044	-71.6767032	0		2569	12
⚙	📄 Contracts	_ Not Assigned		0	0	0		2564	12
⚙	🗑 Delete Provider	_ Not Assigned	1258 Highway 7 Schenectady, NY, 12306	42.78	-73.96	0		4096	12
⚙	Camrone Funding								

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

The Provider Inspection summary form displays.

Provider Inspection Adrian's Bistro Add New



Provider Name

Total Rows: 1

Created Date	Inspection Date	Target Completion	Provider/Facility	Description	Type	Status
5/22/2015	5/22/2015		Adrian's Bistro	initial	Initial	Open

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

Provider Inspection (Input)

Inspection Date *  Target Completion Date 

Type * Status *

Summary Description *

Requested By

Schedule Inspection ☐


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

... Provider Inspection Adrian's Bistro + Add New

Provider Name


Total Rows: 1


	Inspection Date	Target Completion	Provider/Facility	Description	Type	Status
<div> <div>Edit</div> <div>Delete</div> </div>	5/22/2015		Adrian's Bistro	Initial	Initial	Open

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

The Action Inspection Resolution Detail form displays.

... Action Inspection Resolution Detail + Add Row

Inspection Date * 05/22/2015 




Target Completion Date 

Type * Initial

Status * Open

Summary Description * Initial

Requested By aellason

	Begin Date *	Team Name *	Assign Member *	Action Type	Status *	Type	Resolution ID
<input checked="" type="checkbox"/>	07/14/2015 	<input type="text"/> 	<input type="text"/> 		Open	Housing Inspection	<input type="text"/>
<div>Description *</div> <div></div>							
<input checked="" type="checkbox"/>	5/22/2015	Approval1	Tjoe	Other	Open	Housing Inspection	537


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

Organization	Users	Created Date	Org ID
CaseWorthy	204	10/8/2009	12
Catholic Charities	16	6/18/2012	2487
CCUSA External Providers	2	3/13/2013	3728
CCUSA Test	2	1/30/2013	3574
CIS of Bay Area	2	7/26/2015	11932
Clear Brook High School	2	7/26/2015	11925
Clear Springs High School	1	7/26/2015	11923
Communities in Schools	0	7/26/2015	11917
Dale Housing Testing	0	6/29/2015	11852
Dallas Area Affiliate	1	7/27/2015	11941
Dallas School - 01	1	7/27/2015	11944
Dickinson High School	1	7/26/2015	11922
Eric Organization	2	8/23/2013	4174
Head Start	3	12/14/2010	1528
Kingswood CAP	5	8/27/2010	1311
Obamacare Consultancy	0	7/18/2013	4124

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

Organization	Users	Created Date
CaseWorthy	204	10/8/2009
Catholic Charities	16	6/18/2012
CCUSA External Providers	2	3/13/2013
CCUSA Test	2	1/30/2013
CIS of Bay Area	2	7/26/2015
Clear Brook High School	2	7/26/2015
Clear Springs High School	1	7/26/2015
Communities in Schools	0	7/26/2015
Dale Housing Testing	0	6/29/2015
Dallas Area Affiliate	1	7/27/2015
Dallas School - 01	1	7/27/2015

The Providers form displays.

Providers

Manage Categories Add New


Provider Name

Provider Category Choose Options...

- Absence Request Approval Location
- Employer
- Front Desk
- HCS Agency













Total Rows: 4 Search

	Provider	Provider Type	Address, City, State & Zip	Latitude	Longitude	Provider ID	Org ID
⚙	Catholic Charities	HCS Agency	123 South Main Street Salt Lake City, UT, 84111	40.7664825	-111.8909977	2488	2487
⚙	Catholic Charities	Provider	123 South Main Street Salt Lake City, UT, 84111	40.7664825	-111.8909977	2488	2487
⚙	Catholic Charities	Volunteer	123 South Main Street Salt Lake City, UT, 84111	40.7664825	-111.8909977	2488	2487
⚙	Provider B	Provider	123 Sunnyside Road B SCHENECTADY, NY, 12345	0	0	4337	2487

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

Providers

Provider Category

 Edit
 Resources
 Inspections
 Program
 **Provider Services**
 Scan Card Services
 Provider Release
 Provider Contacts
 Property
 Contracts
 Provider Rates
 School Calendar

Total

	Provider Type	Address, City, State & Zip	
⚙	HCS Agency	123 South Main Street Salt Lake City, UT, 84111	4
⚙	Provider	123 South Main Street Salt Lake City, UT, 84111	4
⚙	Volunteer	123 South Main Street Salt Lake City, UT, 84111	4
⚙	Provider	123 Sunnyside Road B SCHENECTADY, NY, 12345	0

The Provider Services form displays.


... Provider Services Catholic Charities + Add New

Category

Total Rows: 206 Search

	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

Save Cancel

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

... Provider Services Catholic Charities

Category

Total Rows: 206

	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		
⚙	+ Edit	No	No		
⚙	⚙ Poverty Billing Rate	No	No		
⚙	\$ Billing Rate	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.

Family Size	Rate	Begin Date	End Date
5	20.0000	5/17/2016	Open

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


Family Size	Begin Date	End Date	Monthly Income Begin Range Amount	Monthly End Amount	Rate
<input checked="" type="checkbox"/> 5	5/17/2016	Open	\$110.00	\$30.00	\$20.00

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.

... Poverty Billing Rate

+ Add Row

	Family Size	Begin Date	End Date	Monthly Income Begin Range Amount	Monthly End Amount	Rate
<input checked="" type="checkbox"/>	0	05/17/2016	12/31/9999	0.00	0.00	0.00
<input checked="" type="checkbox"/>	5	5/17/2016	Open	\$110.00	\$30.00	\$20.00

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.

... Provider Services Catholic Charities

Category

Total Rows: 206

	Referral Service Description	Allow Service Posting	Ⓢ Allow Referral	Approval Process
	AA Meeting	No	Yes	
	Adult Counseling Service	No	Yes	
	AIDS Pharmaceutical Assistance	No	No	
	+ Edit	No	No	
	Poverty Billing Rate	No	No	
	Billing Rate	No	No	
	Anger Management	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 Billing Rate Summary form displays.

... Billing Rate Summary Alcohol or Drug Abuse Services + Add New

Begin Date	End Date	Rate
------------	----------	------

Done

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

The Billing Rate form displays.

... Billing Rate Alcohol or Drug Abuse Services + Add Row

Search

Begin Date	End Date	Rate
------------	----------	------

Save Cancel

Click the + Add Row button to add another entry.

The screenshot shows the 'Billing Rate' configuration page for 'Alcohol or Drug Abuse Services'. At the top, there are navigation tabs: '...', 'Billing Rate', and 'Alcohol or Drug Abuse Services'. A '+ Add Row' button is in the top right. Below the tabs is a search bar with a magnifying glass icon and the text 'Search'. The main area contains a table with the following columns: 'Begin Date', 'End Date', and 'Rate'. The first row of the table is highlighted with a red box. It contains a checked checkbox, the date '05/17/2016', a calendar icon, an empty 'End Date' field with a calendar icon, and the value '0.00' with a close icon. At the bottom right, there is a 'Save' button with a floppy disk icon and a 'Cancel' button, both of which are highlighted with red boxes.

	Begin Date	End Date	Rate
<input checked="" type="checkbox"/>	05/17/2016		0.00


Save Cancel

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
	<div> <div>+ Edit</div> <div> Poverty Billing Rate</div> <div>\$ Billing Rate</div> <div>+ Files</div> </div>	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.

... View Provider Service Files 

Total Rows: 1

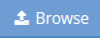

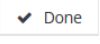
	File Label	Created Date	Created By
	Test Doc	8/1/2016	Writer, Document



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  button.

The Add Provider Service Files form displays.

The screenshot shows the 'Add Provider Service Files' form. It features a blue header bar with the title 'Add Provider Service Files' and a home icon. Below the header, there are three input fields: 'Type' (a dropdown menu), 'Label' (a text input), and 'Upload File' (a file input). To the right of the 'Upload File' input, there are two buttons: 'Browse' and 'Attach Scanned Document'. Both buttons are highlighted with red boxes. At the bottom of the form, there is a dark blue footer bar with 'Save' and 'Cancel' buttons.

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

Providers CaseWorthy Manage Categories Add New

Provider Name: CaseWorthy Provider Category: Choose Options...

Total Rows: 246 Search


Provider	Provider Type	Address, City, State & Zip	Latitude	Longitude	SubProvider Count	Parent Entity ID	Provider ID	Org ID
 Adrian's Bistro	Client Created Business	123 South Main Street Salt Lake City, UT, 84101	40.7664825	-111.8909977	0	14	9711	12
 Edit	Donors	123 South Main Street Salt Lake City, UT, 84101	40.7664825	-111.8909977	0	14	9711	12
 Resources	Employer	123 South Main Street Salt Lake City, UT, 84101	40.7664825	-111.8909977	0	14	9711	12
 Inspections	Provider	123 South Main Street Salt Lake City, UT, 84101	40.7664825	-111.8909977	0	14	9711	12
 Program	Customer	321 West Walnut Street Johnson City, TN, 37604	36.31	-82.35	0		128	12
 Services	Employer	5 West 31st Street New York, NY, 10001	40.7469289	-73.9864213	0		4029	12
 Scan Card Services	Employer	145 South Main Street Salt Lake City, UT, 84111	40.7660267	-111.8909962	0		4144	12
 Provider Release	Lender / Mortgage Provider		0	0	0		12130	12
 Provider Contacts	Foster Care	1441 North 12th Street Phoenix, AZ, 85006	33.4640856	-112.0559072	0		3606	12
 Property	Provider	1441 North 12th Street Phoenix, AZ, 85006	33.4640856	-112.0559072	0		3606	12
 Contracts	Provider Release	1441 North 12th Street Phoenix, AZ, 85006	33.4640856	-112.0559072	0		3606	12
 Provider Rates	Employer	211 East Ocean Boulevard Long Beach, CA, 90802	33.7676076	-118.1907511	0		10012	12
 School Calendar	Provider	111 South 1st Street Austin, TX, 78704	30.261948	-97.7483158	0		11842	12
 Billing Provider								

The School Calendar form displays.

School Calendar Add Row

Total Rows: 3

	Year	Grading Period	Begin Date	End Date	Entity ID
<input checked="" type="checkbox"/>	2015 /2016	1st	8/17/2015	10/30/2015	14
<input checked="" type="checkbox"/>	2015 /2016	2nd	11/1/2015	2/4/2016	14
<input checked="" type="checkbox"/>	2015 /2016	3rd	2/8/2016	6/7/2016	14

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.

... School Calendar + Add Row


Total Rows: 3

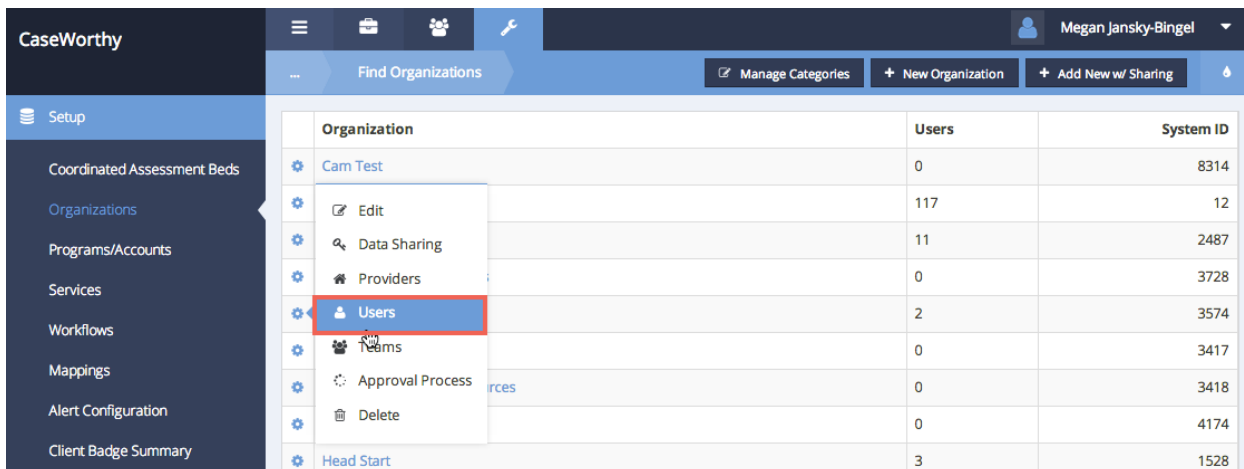
	Year	Grading Period	Begin Date	End Date	Entity ID
<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="14"/>
<input checked="" type="checkbox"/>	2015 /2016	--Nothing--	8/17/2015	10/30/2015	14
<input checked="" type="checkbox"/>	2015 /2016	1st	11/1/2015	2/4/2016	14
<input checked="" type="checkbox"/>	2015 /2016	2nd			
		3rd	2/8/2016	6/7/2016	14

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

User Setup

(Administration>Setup>Organizations)

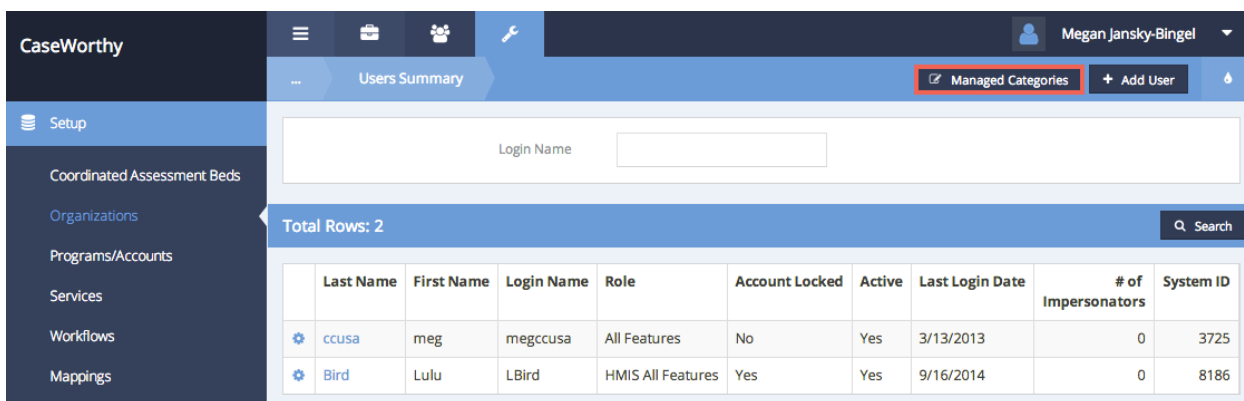
To add users associated with the organization, click on the action gear  and select “Users” from the pop up menu that appears.



The screenshot shows the CaseWorthy interface with the 'Organizations' tab selected. A table lists organizations with columns for Organization, Users, and System ID. For the 'Cam Test' organization, an action menu is open, and the 'Users' option is highlighted with a red box. Other options in the menu include Edit, Data Sharing, Providers, Teams, Approval Process, and Delete.

Organization	Users	System ID
Cam Test	0	8314
	117	12
	11	2487
	0	3728
	2	3574
	0	3417
	0	3418
	0	4174
Head Start	3	1528

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 screenshot shows the CaseWorthy 'Users Summary' page. At the top, there is a search bar for 'Login Name'. Below it, a table displays user information. The 'Managed Categories' button is highlighted with a red box. The table has columns for Last Name, First Name, Login Name, Role, Account Locked, Active, Last Login Date, # of Impersonators, and System ID.

Last Name	First Name	Login Name	Role	Account Locked	Active	Last Login Date	# of Impersonators	System ID
ccusa	meg	megccusa	All Features	No	Yes	3/13/2013	0	3725
Bird	Lulu	LBird	HMIS All Features	Yes	Yes	9/16/2014	0	8186

The User Categories form appears.

CaseWorthy

Megan Jansky-Bingel

User Categories

+ Add Row

2

Description *	Category ID
<input type="checkbox"/> <input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/> Case Manager	2
<input checked="" type="checkbox"/> Provider	3
<input checked="" type="checkbox"/> Mentor	4
<input checked="" type="checkbox"/> Finance / Accounting	5
<input checked="" type="checkbox"/> Instructor	6
<input checked="" type="checkbox"/> Portal	7

3

Save Cancel

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

Description *	Category ID
<input checked="" type="checkbox"/> Case Manager	2

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.

CaseWorthy

Megan Jansky-Bingel

Users Summary

Managed Categories + Add User

Login Name

Total Rows: 2

Search

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

... Add User

Please enter HMIS user login information. Passwords must be at least eight characters long, have at least one number and one letter; not use or include the username, the HMIS name, or the HMIS vendor's name; not consist entirely of any word found in the common dictionary or any of the previously discussed words spelled backwards

Login Name *

First Name *

Employment Start Date

Password *

Confirm Password *

Last Name *

Other User Configuration Information

Organization * CaseWorthy

Role *

User Category Choose Options...

Provider *

User Type *

Users Skill Choose Options...

Is a Supervisor ☐

Supervisor Information

Add / Change Supervisor Information ☒

Current Supervisor

Begin Date

End Date

View Supervisor History

Address Information

Address

Address2

Zip Code *

City

State

Contact Preferences

Work Phone Primary

Work Phone Ext

Cell Phone Secondary

Email * kseay@caseworthy.com

Confirm Email * kseay@caseworthy.com

Skype Account

Gmail Account and Outlook

NOTE: The gmail password must conform to CaseWorthy™ password rules: Minimum 6 characters long; include one capital letter, one number and one special character.

Gmail Account

Confirm Gmail Account


Gmail Password


Confirm Gmail Password

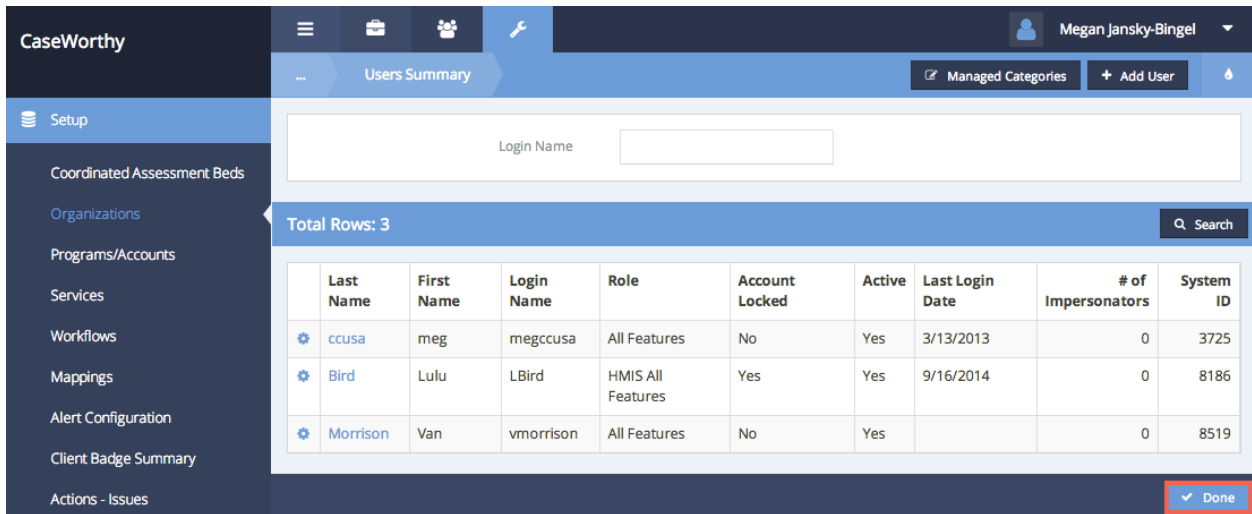
Do you want to sync to Outlook / Gmail ☐




Save Cancel

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.

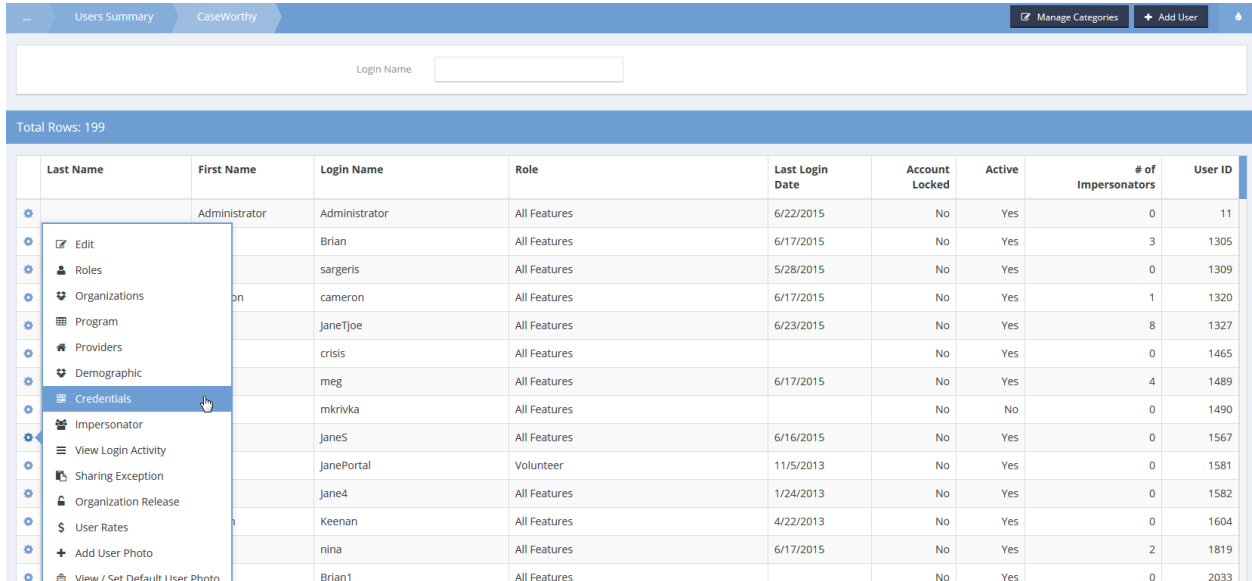
The User summary form displays. Click  **Done** on the bottom right side of the form. The Organization summary form presents.


















	Last Name	First Name	Login Name	Role	Account Locked	Active	Last Login Date	# of Impersonators	System ID
	ccusa	meg	megccusa	All Features	No	Yes	3/13/2013	0	3725
	Bird	Lulu	LBird	HMIS All Features	Yes	Yes	9/16/2014	0	8186
	Morrison	Van	vmorrison	All Features	No	Yes		0	8519

User Credentials and Skills

(Administration>Setup>Organizations>Users)



	Last Name	First Name	Login Name	Role	Last Login Date	Account Locked	Active	# of Impersonators	User ID
		Administrator	Administrator	All Features	6/22/2015	No	Yes	0	11
		Brian		All Features	6/17/2015	No	Yes	3	1305
		sargeris		All Features	5/28/2015	No	Yes	0	1309
		cameron		All Features	6/17/2015	No	Yes	1	1320
		JaneTJoe		All Features	6/23/2015	No	Yes	8	1327
		crisis		All Features		No	Yes	0	1465
		meg		All Features	6/17/2015	No	Yes	4	1489
		mkivka		All Features		No	No	0	1490
		JaneS		All Features	6/16/2015	No	Yes	0	1567
		JanePortal		Volunteer	11/5/2013	No	Yes	0	1581
		Jane4		All Features	1/24/2013	No	Yes	0	1582
		Keenan		All Features	4/22/2013	No	Yes	0	1604
		nina		All Features	6/17/2015	No	Yes	2	1819
		Brian1		All Features		No	Yes	0	2033

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

... Credentials and Skills Summary Eliason, Adrian + Add New

Total Rows: 1

Credential	Skill	Description	Case Note	Credential ID
Skill	Ability to Motivate and Assist			178

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

... Credentials and Skills + Add New Skill Types + Add Row

<input checked="" type="checkbox"/>	<input type="text" value=""/>	Q	<input type="text" value=""/>	<input type="text" value=""/>
Begin Date	07/15/2015		12 : 00 a	End Date
Issuing Institution	<input type="text" value=""/>			Issued Date
Attach a file	No			
Month Experience	<input type="text" value=""/>			

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.

Select Skill and Credential Types Lookup

Select Skill and Credential Types

Credential Category


Total Rows: 113 Q Search




Credential Type	Skills	Credential Category
Skill	Ability to Motivate and Assist	Soft Skill
Bachelor's Degree	Ability to Motivate and Assist	Education
Work Experience	Able to lift up to 40 lbs	Work History
Skill	Able to lift up to 40 lbs	Soft Skill
Bachelor's Degree	Able to lift up to 40 lbs	Education
License	Able to lift up to 40 lbs	Certification
Work Experience	Able to work in hot, humid and loud environment	Work History
Skill	Able to work in hot, humid and loud environment	Soft Skill
Work Experience	Able to work in standing position for 7 hours	Work History
Skill	Able to work in standing position for 7 hours	Soft Skill
Associates Degree	Able to work in standing position for 7 hours	Education
Associates Degree	American Sign Language	Education


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

... Credentials and Skills + Add New Skill Types + Add Row




<input checked="" type="checkbox"/>	<input type="text" value="Work Experience"/>	Q	<input type="text" value="Able to lift up to 40 lbs"/>	<input type="text" value=""/>
Begin Date	07/15/2015		12 : 00 a	End Date
Attach a file	No			
Month Experience	<input type="text" value=""/>			


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

... Credentials and Skills Summary Eliason, Adrian 				
Total Rows: 1				
 Edit  Delete	Skill		Description	Credential ID
	Ability to Motivate and Assist			178

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

The Edit Client Credentials and Skill form displays.

... Edit Client Credentials and Skills 	
Credential	Skill 
Skill Ability to Motivate and Assist	
Description	
Case Note	
Case Note	
Related Documentation (To view files already attached to this credential, go to the Files and Documents area on the client record)	
Attach a file	No

Make any desired changes and click  Save when finished.


Sharing Exception

Objective: Manage organization sharing by User.

Navigaton: Administration>Setup>Organizations

The find organizations form displays.

...	Find Organizations	Manage Categories	+ New Organization	+ Add New w/ Sharing	
Total Rows: 39					Search
	Organization	Users	Created Date	Org ID	
	I Sample Organization	2	7/15/2016	14413	
	Boys Hope	1	5/16/2016	13130	
	Brandon Test 7-19-16	1	7/19/2016	14436	
	Brody Test	1	7/19/2016	14433	
	CaseWorthy	132	10/8/2009	12	
	Catholic Charities	16	6/18/2012	2487	
	CCUSA External Providers	2	3/13/2013	3728	
	CCUSA Test	2	1/30/2013	3574	
	CIS of Bay Area	2	7/26/2015	11932	
	Clear Brook High School	2	7/26/2015	11925	
	Clear Springs High School	1	7/26/2015	11923	
	Communities in Schools	0	7/26/2015	11917	
	Dale Housing Testing	1	6/29/2015	11852	
	Dallas Area Affiliate	1	7/27/2015	11941	
	Dallas School - 01	1	7/27/2015	11944	
	Dickinson High School	1	7/26/2015	11922	
					Done

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

Total Rows: 39			
	Organization	Users	Created Date
	I Sample Organization	2	7/15/2016
	Boys Hope	1	5/16/2016
	Brandon Test	1	7/19/2016
	Brody Test	1	7/19/2016
	CaseWorthy	132	10/8/2009
	Catholic Charities	16	6/18/2012
	CCUSA Test	2	3/13/2013
	CIS of Bay Area	2	1/30/2013
	Clear Brook High School		
	Clear Springs High School		
	Communities in Schools		
	Dale Housing Testing		
	Dallas Area Affiliate		
	Dallas School - 01		
	Dickinson High School		

Edit

Data Sharing

Providers

Users

Teams

Approval Process

The Users Summary form displays.

...

Users Summary

Manage Categories


+ Add User

Login Name

Total Rows: 132

	Last Name	First Name	Login Name	Role	Last Login Date	Account Locked	Active	# of Impersonators	User ID
		Administrator	Administrator	All Features	7/21/2016	No	Yes	0	11
	Bingel	Brian	Brian	All Features	7/18/2016	No	Yes	3	1305
	Argeris	Scott	sargeris	All Features	11/16/2015	No	Yes	0	1309
	Beck	Cameron	cameron	All Features	7/19/2016	No	Yes	1	1320
	Tjoe	Jane	JaneTjoe	All Features	7/19/2016	No	Yes	8	1327
	Hotline	Crisis	crisis	All Features		No	Yes	0	1465
	monti	meg	meg	All Features	7/19/2016	No	Yes	4	1489
	Sutarto	Jane	JaneS	All Features	4/4/2016	No	Yes	0	1567
	Portal	jane	JanePortal	Volunteer	11/5/2013	No	Yes	0	1581
	Keenan	Keenan	Keenan	All Features	4/22/2013	No	Yes	0	1604
	Wilson	Nina	nina	All Features	7/19/2016	No	Yes	2	1819
	Davis	Casey	casdavis	All Features	7/14/2014	No	Yes	0	2037
	maurer	alex	Alexm	All Features	1/16/2014	Yes	No	0	2040


Done

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

⚙	Providers	msiple	All Features	7/18/2016	Nc
⚙	Demographic	msiple2	All Features	11/10/2014	Nc
⚙	Credentials	tseay	All Features	6/14/2016	Nc
⚙	Impersonator	dseay	All Features	7/19/2016	Nc
⚙	View Login Activity	Dale	All Features	1/12/2016	Nc
⚙	Sharing Exception	kseay	All Features	7/5/2016	Nc
⚙	Organization Release	Richard	HMIS All Features	7/10/2016	Nc
⚙	User Rates	rrichins	All Features	7/7/2016	Nc
⚙	Add User Photo	JenR	All Features	5/27/2016	Nc
⚙	View / Set Default User Photo				

The Exception Summary form displays.

Entity Release ID	Exclude Organization	User Name	Transaction Type	Description
210	! Sample Organization	Dale	Program	25 Ryan White

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.


Exclude Organization: ! Sample Organization

Transaction Type: Program

Program Search: 25 Ryan White

User Name: Dale


Edit the Organization being excluded from that user's access, name and/or provider if desired. Click the

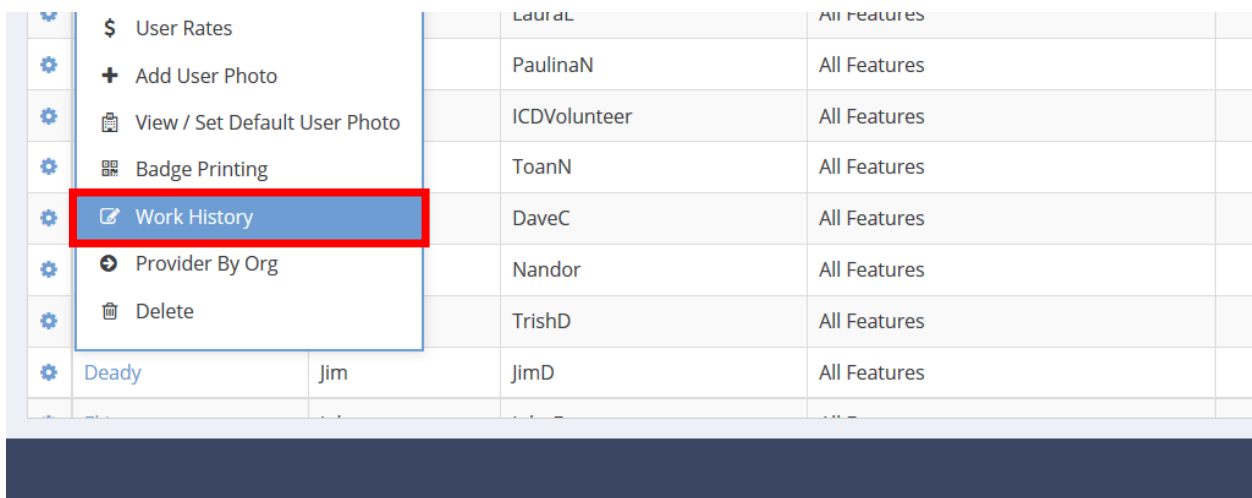
 Save button to save and exit.

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.

... User Work History Summary + Add New


Total Rows: 2

	Employer Name / Job Title	Begin - End Dates	Employment Type	Pay Type	Health Benefits	Pay Rate	Monthly Amount
	Apple Computers - Real / Technician	8/13/2014 - Open	Part Time		No	\$0.00	\$0.00
	Documentation / Worker	8/1/2011 - Open	Full Time		No	\$0.00	\$0.00

✓ Done


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.

... Enter User Work History

Employer / Provider Name * 

Address


City

Employer Contact 


Address 2

State

Enter the Individual's Job Information

Work Begin Date * 

Job Title *

Job Description 

Employment Type *

Hourly / Salary Calculation Area

Hourly / Salary *

Payment Interval *

Wage and Weekly, Monthly, Annual Salary Details

Yearly Total

Monthly Total



Pay Rate Per Hour



Avg Pay per Pay Period


Benefits

Worker pays some benefits ☐

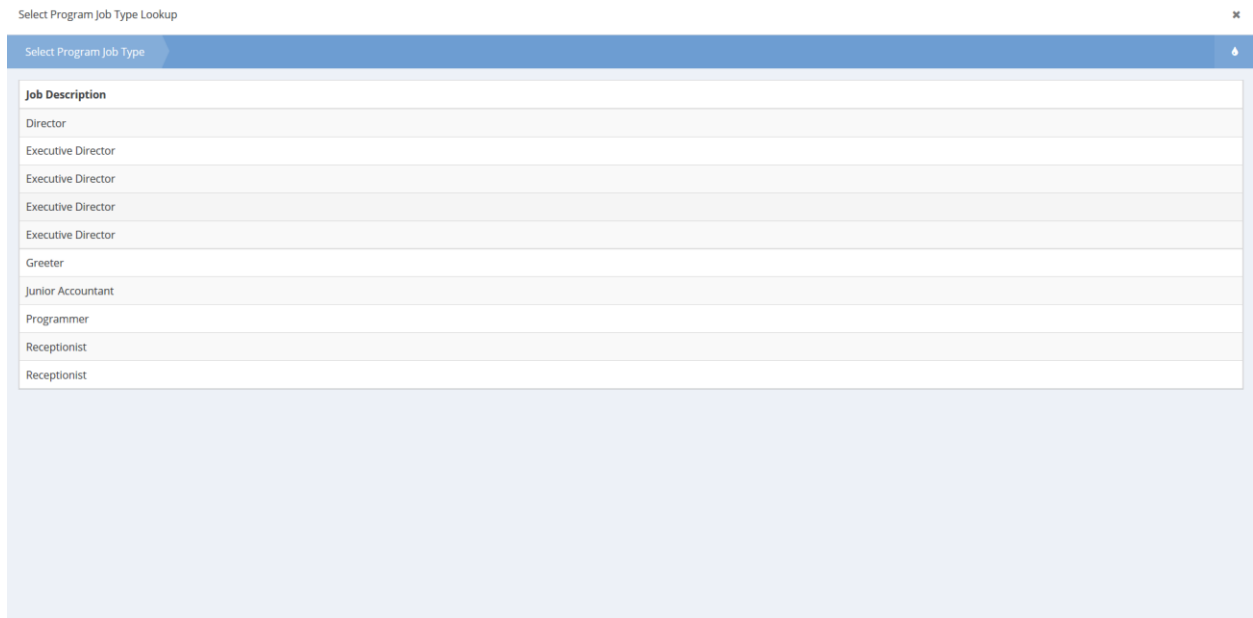
If the individual has left the employment please give details.

Work End Date  


 Save  Cancel

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.



Job Description
Director
Executive Director
Executive Director
Executive Director
Executive Director
Greeter
Junior Accountant
Programmer
Receptionist
Receptionist

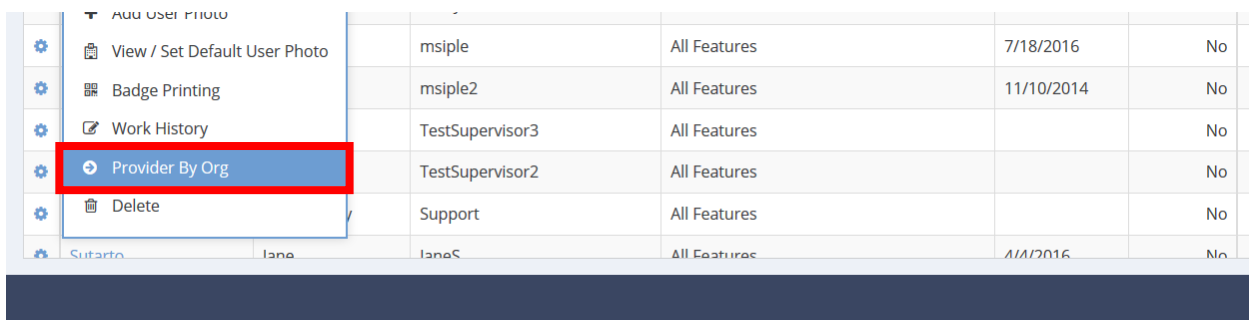
Select a job description. The form closes upon selection. Click the  Save button to save and exit.

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.




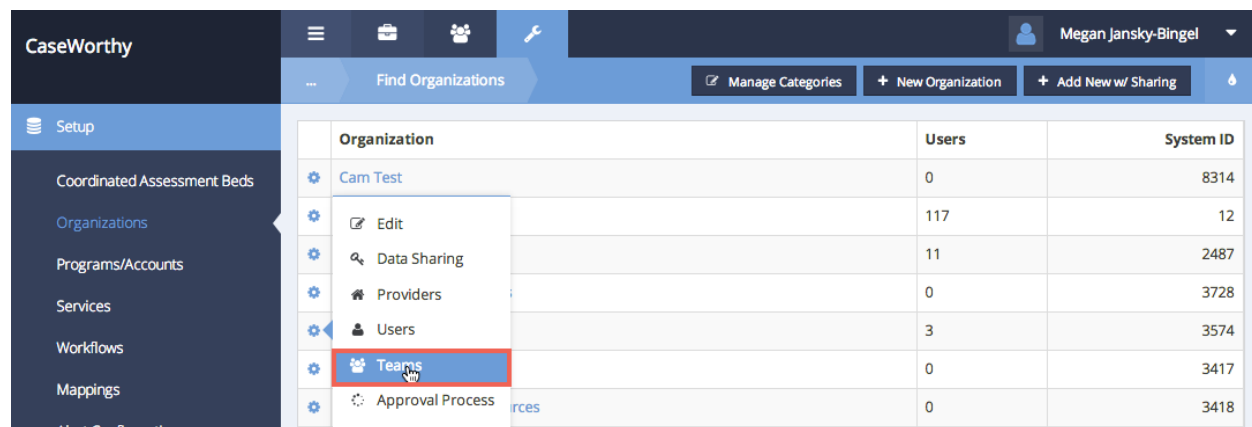
Providers under organizations the user is associated with, display. Click the  Save button to save and exit.

Teams

(Administration>Setup>Organizations>Users)

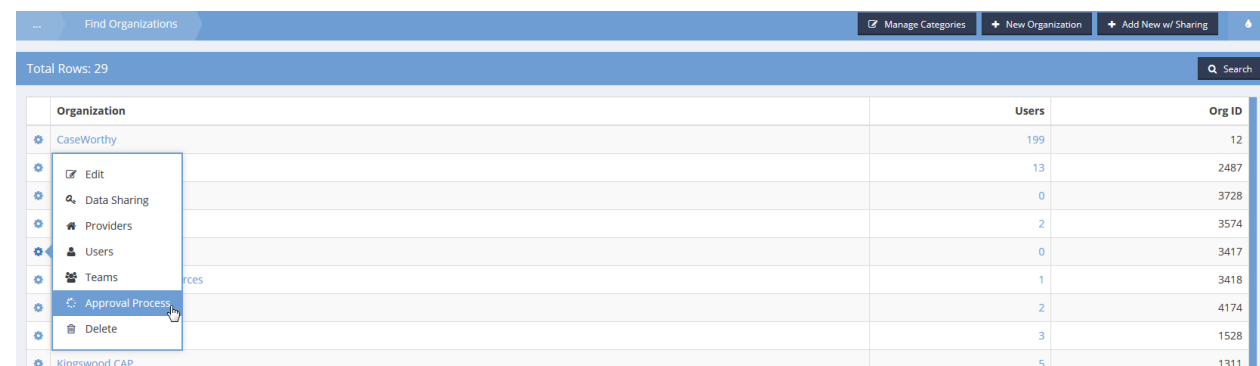
Teams can be used for two primary purposes in CaseWorthy™ – as approval groups or as task-oriented groups. When a team is linked to an approval process, it becomes an approval group, which gives members the authority to approve certain actions within the system such as payments, incident reports, services, 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.

...


Approval Set-up Summary

CaseWorthy

Q Add New

Total Rows: 23

	Approval Name	Approval Type	Provider	Case Note Type	Severity/SubType	Modified	Proc. ID
	Single Approval	Project Time				6/8/2015	7
	<div><div><div> Edit</div><div> Delete</div></div></div>	Resource Usage Absence	CaseWorthy			5/29/2015	31
		Incident Report			High - Non-Sensitive	5/18/2015	11
		Incident Report			High - Sensitive	5/18/2015	7

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

Approval Process Set Up

Select the approval type to configure and then choose the approval process. This directs the approval type to the specific approval process.


Approval Type * Project Time

Approval Process * Single Approval

Select a specific provider for the selected approval type to further restrict the approval options.

Provider

Is Program ☐

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)

...

Find Organizations


Manage Categories

New Organization

Add New w/ Sharing

Total Rows: 29

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

Providers			Users	Org ID
...	✎ Edit			
...	🔗 Data Sharing			
...	🏠 Providers		158	12
...	👤 Users		12	2487
...	👥 Teams		0	3728
...	🔄 Approval Process		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.

Providers

Manage Categories

Add New


Provider Name

Provider Category

Choose Options...

Total Rows: 190

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.

Providers			Manage Categories		Add New			
...	✎ Edit							
...	🔗 Resources							
...	📋 Program							
...	👤 Services							
...	📄 Scan Card Services							
...	🔑 Provider Release							
...	📞 Provider Contacts							
...	🏠 Property							
...	📄 Contracts							

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
Brazos Valley Community Action Group	Customer	123 South Main Street SALT LAKE CITY, UT, 84107	0	0	0		120	12
Caitlin's Cupboard	_ Not Assigned		0	0	0		2569	12
Camille's Congregate Dining	_ Not Assigned		0	0	0		2564	12
...	_ Not Assigned	1258 Highway 7 Schenectady, NY, 12306	42.78	-73.96	0		4096	12
...	Customer		0	0	0		4135	12
...	Employer	1234 RALEIGH, NC, 27605	0	0	0		4443	12
...	Employer	1400 West North Temple Salt Lake City, UT, 84116	40.77	-111.93	0		4122	12
...	Employer	740 East 3900 South Salt Lake City, UT, 84107	40.68	-111.87	6		14	12
...	Front Desk	740 East 3900 South Salt Lake City, UT, 84107	40.68	-111.87	6		14	12
...	Landlord	740 East 3900 South Salt Lake City, UT, 84107	40.68	-111.87	6		14	12
...	Provider	740 East 3900 South Salt Lake City, UT, 84107	40.68	-111.87	6		14	12
...	Location	740 East 3900 South Salt Lake City, UT, 84107	40.68	-111.87	6		14	12

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.

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		
		Manor Apartments - 1st Floor (Sales Training)	Units	40	94		
		Permanent Supportive Housing	Units	30	66		
		SOH Facility		50	71		
		Manor Emergency Housing		100	56		
		Baker Street - Shelter Laundry		0	84		

The Resource Usage form displays.

...

Resource Usage

Q Manage Categories


+ Add Usage

Usage Name

Total Rows: 6

Q Search

	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	Isample 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 Mondav of the month	Bed Nighht	2 YAGA	8/9/2013 - Present	Enter Enrollment Optional	50	

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

Resource Usage

Manage CategoriesAdd Usage

Usage Name

Total Rows: 6

Search

	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
	<div> Edit</div>	Bed Night	Isample prog (HIV)	1/1/2012 - Present	Required/Auto Enrollment	50	7
	<div> Room Designer</div>	Daily Shelter Bed Night	SOH ONG	1/1/2012 - Present	Required/Auto Enrollment	50	34
	<div> Slot Inventory</div>	Bed Night	2 YAGA	8/9/2013 - Present	Enter Enrollment Optional	50	2
	<div> Short Edit</div>	Bed Night	Isample prog (HIV)	1/7/2014 - 12/30/2015	Enter Enrollment Optional	30	2
	<div> Wait List</div>	Bed Night	Isample prog (HIV)	7/23/2014 - Present	Required/Auto Enrollment	17	10
	<div> Seasonal Beds</div>						
	<div> Housing Setup</div>						

The Seasonal and Overflow Bed Setup form displays.

Seasonal and Overflow Bed Setup + Add Row

Use this form to indicate the date range of time that seasonal and overflow beds will be available for the specific usage.

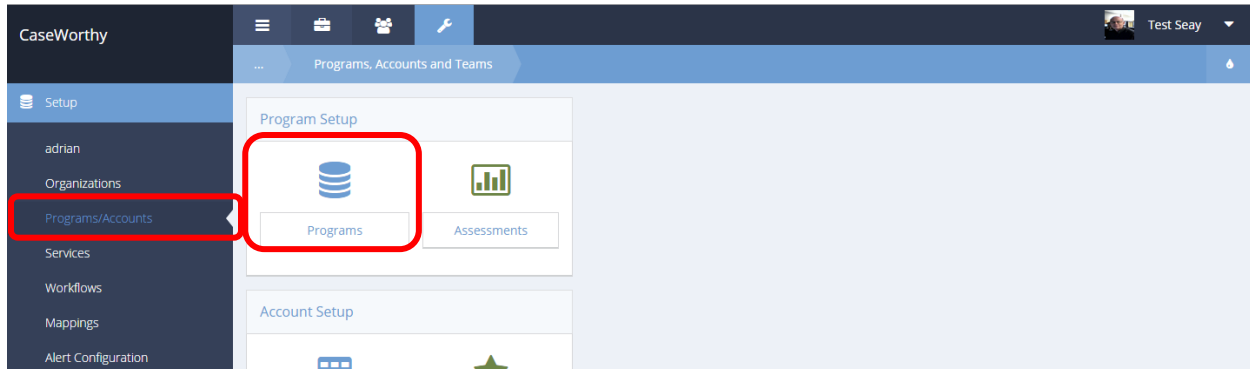
	UsageID	Start Date *	End Date *	Availability *	Resource Name	Usage
<input checked="" type="checkbox"/>	147	10/1/2014	4/30/2015	Seasonal	SOH Facility	Monthly Shelter Begin 19th
<input checked="" type="checkbox"/>	147	1/1/2015	1/31/2015	OverFlow	SOH Facility	Monthly Shelter Begin 19th

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

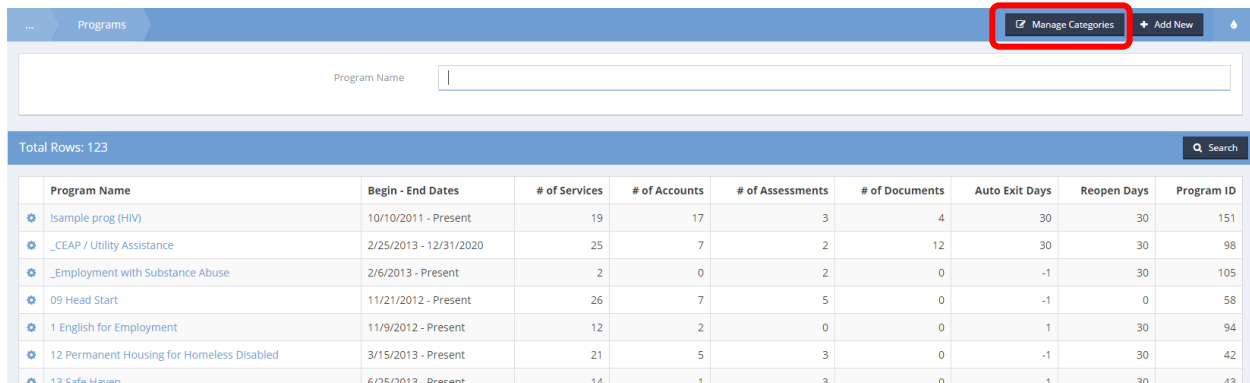
Programs

(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.

CaseWorthy

Megan Jansky-Bingel

Program Categories

+ Add Row

2

Description *	CategoryTypeID
United Way	
HPRP	1
CSBG	2
Goodwill ASR	3
AHAR	4
PATH	5
test	6
CDBG Housing	7
CDBG Non Housing	8
APR	9
HIC	10
CC Asset Development	11
CC Education and Enrichment	12
CC Immigration	13
CC Refugee	14
CC Adoption	15
CC Pregnancy	16

3

Save Cancel

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.

CaseWorthy

Megan Jansky-Bingel

Programs

Manage Categories + Add New

2

Total Rows: 121

Program Name	Begin - End Dates	# of Services	# of Accounts	# of Assessments	# of Documents	Auto Exit Days	Reopen Days	System ID
Isample prog (HIV)	10/10/2011 - 9/18/2014	17	16	2	4	30	30	151
_CEAP / Utility Assistance	2/25/2013 - 11/30/2015	23	7	2	12	30	30	98

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

The Add/Edit Program form displays.

... Add/Edit Program

Program Name ★

Organizations ★ All None

Outcome Domains Choose Options...

Categories Choose Options...

Enter or View Expanded Program Description

Enter the begin and end dates for this program.

Enrollments Enabled Yes

Begin Date ★

End Date ★ Present

Identify the entry and exit workflows to be used with this program. Also, enter the program eligibility rules.

Exit Family Workflow ★ Enrollment Exit

Exit Member Workflow ★ Assessment - Exit

Eligibility Rule Edit Rule Copy Rule From

Enter Auto Exit Information

Auto Exit Days 90

Reopen Days 30

Notify On Auto Exit Neither

Contact Before Days 0

Service Request Configuration

Final Approval Options

Service Configuration ★ Display

Days in Programs - Enter the minimum and maximum days a client or family can be enrolled in the program.

Minimum 0

Maximum 0

Save Cancel

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.

Identify the entry and exit workflows to be used with this program. Also, enter the program eligibility rules.

Exit Family Workflow ★ Exit Member Workflow ★

Eligibility Rule

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.

Enter Auto Exit Information

Auto Exit Days Reopen Days

Notify On Auto Exit

Contact Before Days

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.

Days in Programs - Enter the minimum and maximum days a client or family can be enrolled in the program.

Minimum Maximum

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 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.

Identify the entry and exit workflows to be used with this program. Also, enter the program eligibility rules.

Exit Family Workflow ★	Enrollment Exit ▼	Exit Member Workflow ★	Assessment - Exit ▼
Eligibility Rule	Edit Rule	Copy Rule From	

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

Editing Enrollment Eligibility Rule

Rule Set

Apply Rules to Family Members: All

FamilyMember.DateAdded = all 1

Add or delete rule Select data item Select value

Save Cancel

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.

	System ID	Description	Organization	Unit of Measure	Programs Linked	Unit Value
⚙	161	AA Meeting	All	Hours	17	\$0.50
⚙	318	Abstinence Education	All	Each	1	\$1.00
⚙	180	ADC	All	1/4 Hour (15	2	\$0.25

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 [Manage Categories](#) button on the top right of the form.

	System ID	Description	Organization	Unit of Measure	Programs Linked	Unit Value
⚙	161	AA Meeting	All	Hours	17	\$0.50
⚙	318	Abstinence Education	All	Each	1	\$1.00

The Manage Service Type Categories form appears.

CaseWorthy

Manage Service Type Categories

1 + Add Row

2

Description	Category ID
<input checked="" type="checkbox"/> Emergency Services	
<input checked="" type="checkbox"/> After School Care Program Supplies	62
<input checked="" type="checkbox"/> Basic	32
<input checked="" type="checkbox"/> Case Management	8
<input checked="" type="checkbox"/> Child Care	36
<input checked="" type="checkbox"/> Day-Activity	35
<input checked="" type="checkbox"/> DD - Children	24
<input checked="" type="checkbox"/> DD - Employment	25
<input checked="" type="checkbox"/> DD - Employment 2011	26
<input checked="" type="checkbox"/> DD - Intake Services	22
<input checked="" type="checkbox"/> Dental	21
<input checked="" type="checkbox"/> Deposit	54
<input checked="" type="checkbox"/> Deposit Refunds	56
<input checked="" type="checkbox"/> DVR Services	23

3 Save Cancel

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.

CaseWorthy

Service Types

Manage Categories **+ Add New**

Service Description Category

Total Rows: 357

	System ID	Description	Organization	Unit of Measure	Programs Linked	Unit Value
⚙	161	AA Meeting	All	Hours	17	\$0.50
⚙	318	Abstinence Education	All	Each	1	\$1.00

The Add/Edit Service Type form displays.

Edit Service Type

Description ★

Unit Of Measure ★

Service Usage ★

Organizations

Effective Date

Unit Value ★

Search Categories ★


Report Category ★

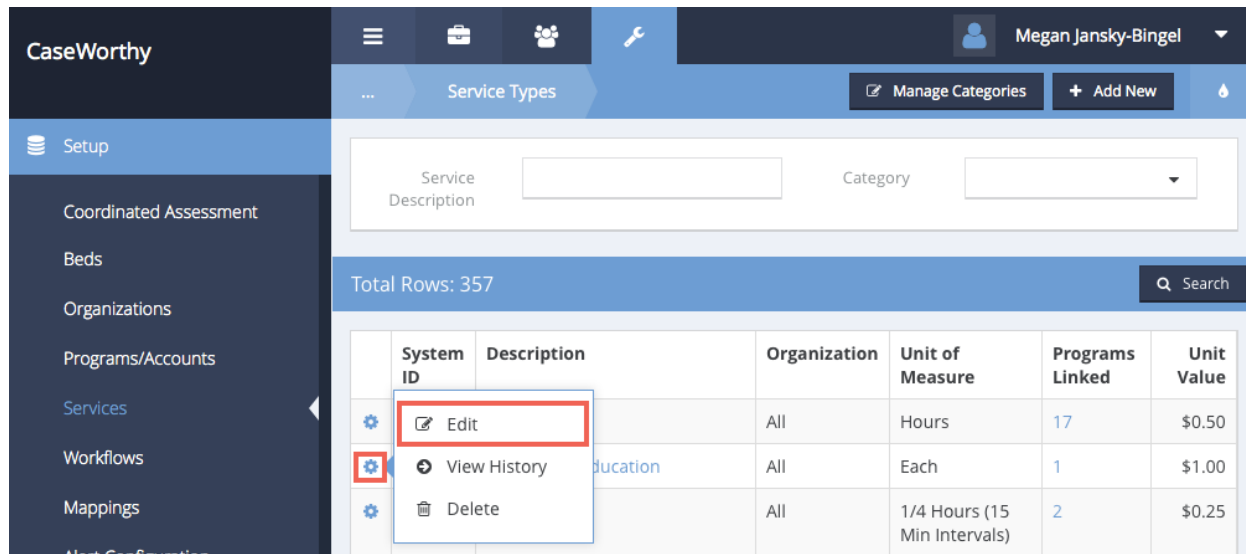
📌 Duplicate minutes defines the number of minutes allowed between postings of this service. If you set it to 60 minutes, the client would only be able to receive this service once per hour. 0 indicates no limit.

Duplicate Minutes ★

Track Lease Activity ☐

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.

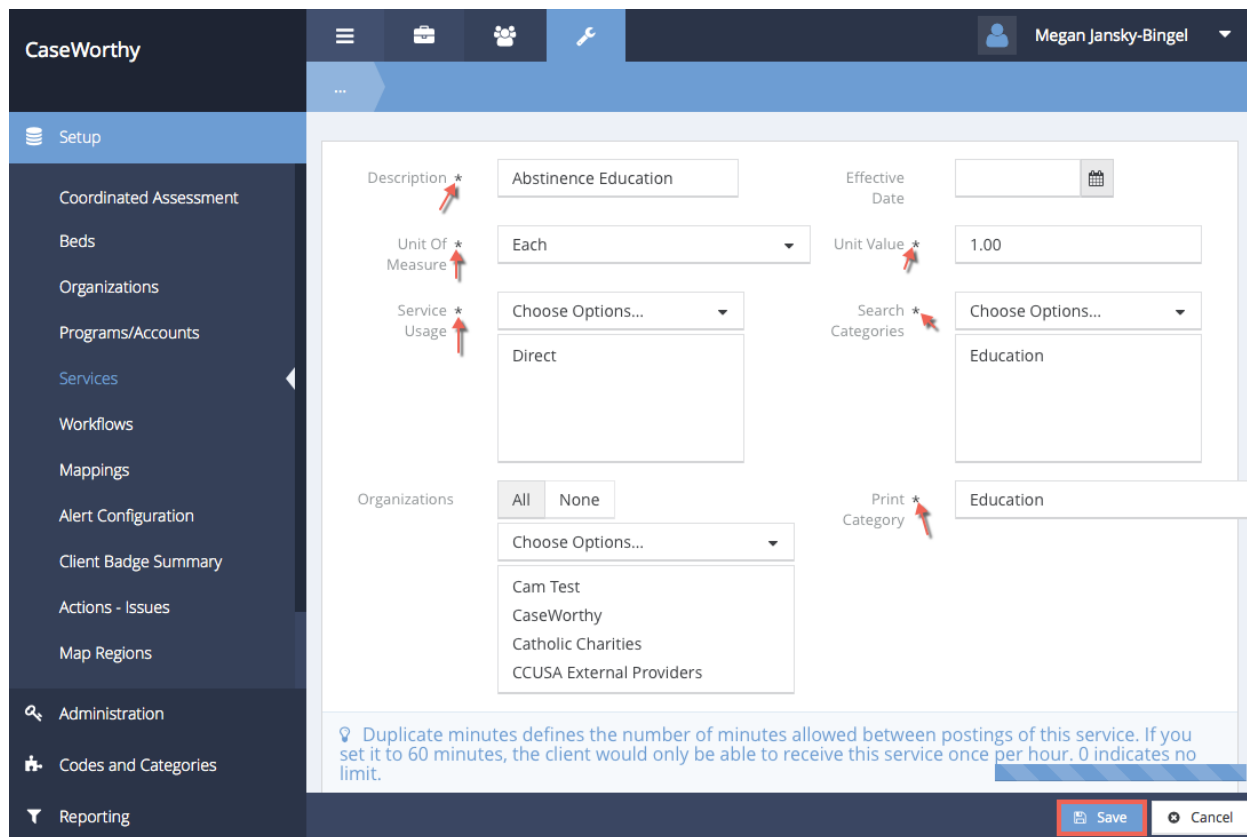
To edit a service type, click the gear  associated with the desired service on the Service Types form and select Edit from the popup menu that appears.



The screenshot shows the CaseWorthy interface with the 'Service Types' form. The left sidebar lists various setup options, with 'Services' highlighted. The main area shows a table of service types. A red box highlights the 'Edit' button in the context menu for the first service type.

System ID	Description	Organization	Unit of Measure	Programs Linked	Unit Value
	Abstinence Education	All	Hours	17	\$0.50
	Education	All	Each	1	\$1.00
		All	1/4 Hours (15 Min Intervals)	2	\$0.25

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



The screenshot shows the CaseWorthy interface with the 'Add/Edit Service Type' form. Red arrows point to required fields marked with a star icon: Description, Unit Of Measure, Service Usage, Effective Date, Unit Value, Search Categories, and Print Category.

Fields and values shown:

- Description: Abstinence Education
- Unit Of Measure: Each
- Service Usage: Choose Options... (Direct)
- Effective Date: [Calendar icon]
- Unit Value: 1.00
- Search Categories: Choose Options... (Education)
- Print Category: Education

Organizations: All, None, Choose Options... (Cam Test, CaseWorthy, Catholic Charities, CCUSA External Providers)

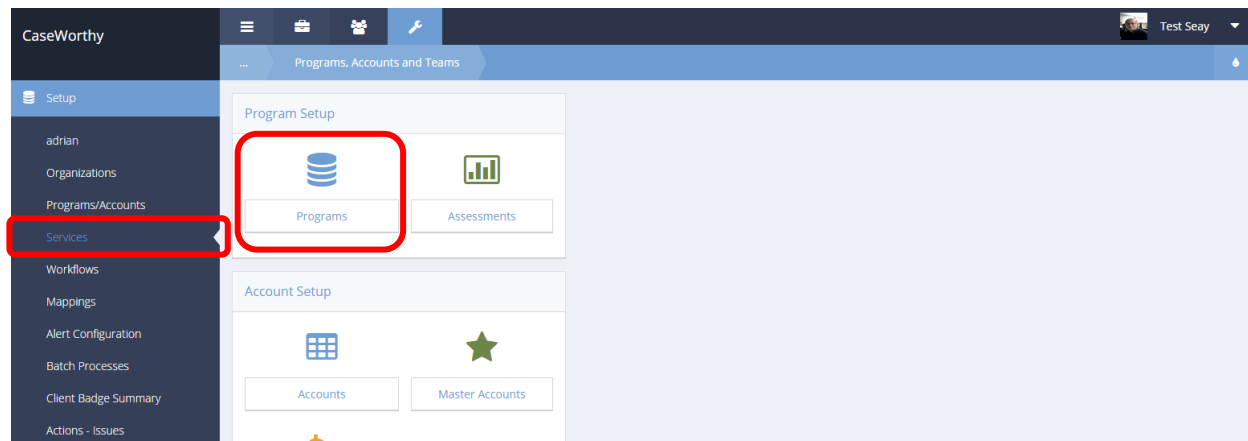
Footer: Duplicate minutes defines the number of minutes allowed between postings of this service. If you set it to 60 minutes, the client would only be able to receive this service once per hour. 0 indicates no limit.

Buttons: Save, Cancel

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.

Programs									
<div>Program Name <input type="text"/></div>									
<div>Total Rows: 123 Search</div>									
Program Name	Begin - End Dates	# of Services	# of Accounts	# of Assessments	# of Documents	Auto Exit Days	Reopen Days	Program ID	
Isample 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	
16	

Navigate to the desired program and click on the action gear


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

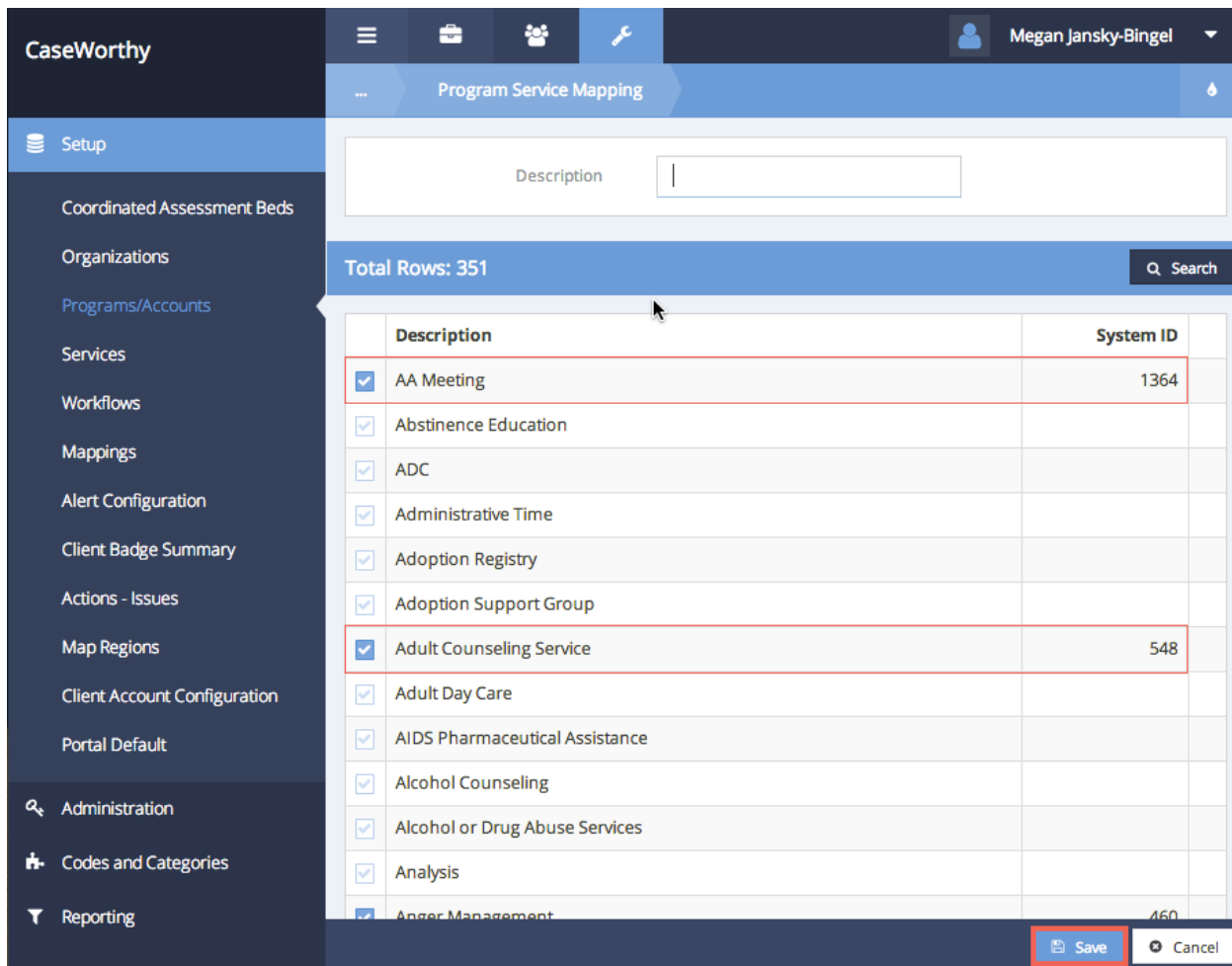
The screenshot shows the CaseWorthy System Administrator interface. The left sidebar contains navigation links: Setup, Coordinated Assessment Beds, Organizations, Programs/Accounts, Services, Workflows, Mappings, Alert Configuration, Client Badge Summary, Actions - Issues, Map Regions, Client Account Configuration, Portal Default, Administration, Codes and Categories, and Reporting. The main area is titled 'Programs' and shows a table with columns: Program Name, Basic, # of services, # of Accounts, # of Assessments, # of Documents, Auto Exit Days, and Reopen Days. A dropdown menu is open over the table, listing options: Edit, HMIS Setup, Assessments, Program Services (highlighted with a red box), Program Service Eligibility, Accounts / Funding Sources, Documents, Checklists, Outcomes, Self Sufficiency Matrix, Program Budgets (Summary), Program Contracts, Program Billing Service Summary, and Delete. The bottom right of the interface has a 'Done' button.

The Program Services form displays a full list of services.

The screenshot shows the CaseWorthy System Administrator interface for the 'Program Services' section. The top bar is titled 'Program Services'. Below it is a search bar with the label 'Description'. The main area shows a table with columns: Description, Unit of Measure, Effective Date, and Program Service ID. The table contains 361 rows, with the first 8 rows visible. Each row has a checkbox in the first column.

	Description	Unit of Measure	Effective Date	Program Service ID
<input checked="" type="checkbox"/>	AA Meeting		10/1/2014	1390
<input checked="" type="checkbox"/>	Abstinence Education			
<input checked="" type="checkbox"/>	ADC			1352
<input checked="" type="checkbox"/>	Administrative Time			
<input checked="" type="checkbox"/>	Adoption Registry			
<input checked="" type="checkbox"/>	Adoption Support Group			
<input checked="" type="checkbox"/>	Adult Counseling Service			1391
<input checked="" type="checkbox"/>	Adult Day Care			

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.



CaseWorthy

Program Service Mapping

Megan Jansky-Bingel

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

Description

Total Rows: 351

Search

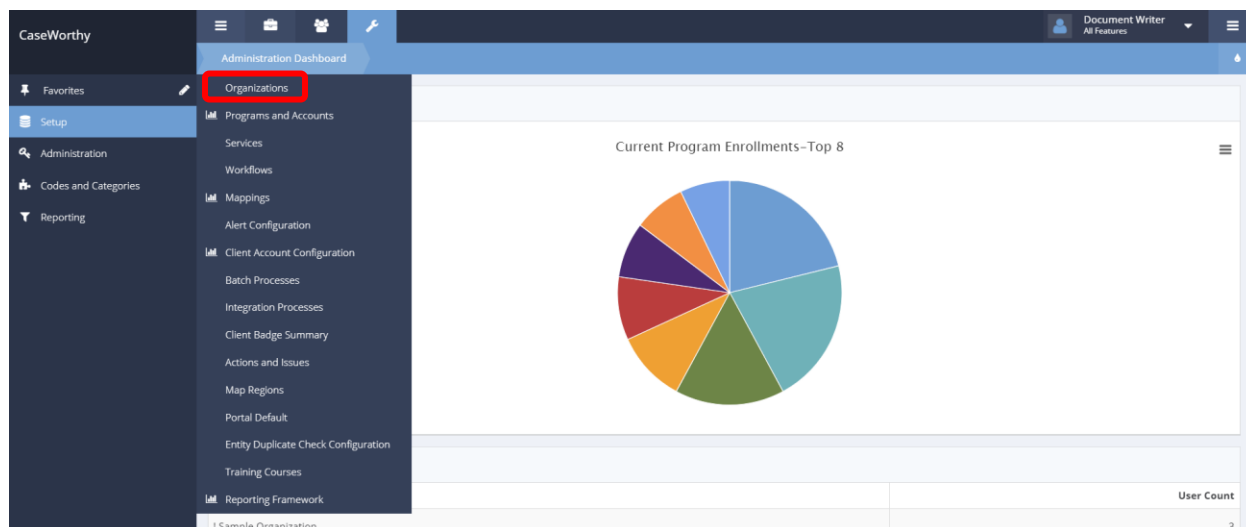
	Description	System ID
<input checked="" type="checkbox"/>	AA Meeting	1364
<input checked="" type="checkbox"/>	Abstinence Education	
<input checked="" type="checkbox"/>	ADC	
<input checked="" type="checkbox"/>	Administrative Time	
<input checked="" type="checkbox"/>	Adoption Registry	
<input checked="" type="checkbox"/>	Adoption Support Group	
<input checked="" type="checkbox"/>	Adult Counseling Service	548
<input checked="" type="checkbox"/>	Adult Day Care	
<input checked="" type="checkbox"/>	AIDS Pharmaceutical Assistance	
<input checked="" type="checkbox"/>	Alcohol Counseling	
<input checked="" type="checkbox"/>	Alcohol or Drug Abuse Services	
<input checked="" type="checkbox"/>	Analysis	
<input checked="" type="checkbox"/>	Anger Management	460

Save Cancel

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.

Find Organizations			
Total Rows: 83			
Organization	Users	Created Date	Org ID
CaseWorthy	185	10/8/2009	12
Kingswood CAP	5	8/27/2010	1311
Test Org 1	1	8/27/2010	1312

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

Find Organizations			
Total Rows: 83			
Organization	Users	Created Date	Org ID
CaseWorthy	185	10/8/2009	12
Kingswood CAP	5	8/27/2010	1311
Test Org 1	1	8/27/2010	1312
Head Start	4	12/14/2010	1528

The Users Summary page appears.

Users Summary CaseWorthy									
<div> <div>Filters</div> <div> <input type="text"/> </div> </div>									
Total Rows: 200									
	Last Name	First Name	Login Name	Role	Last Login Date	Account Locked	Active	# of Impersonators	User ID
		Administrator	Administrator	All Features	9/25/2017	No	Yes	0	11
	Bingel	Brian	Brian	All Features	9/25/2017	No	Yes	4	1305
	Argeris	Scott	sargeris	All Features	5/17/2017	No	Yes	0	1309
	Beck	Cameron	cameron	All Features	9/25/2017	No	Yes	1	1320
	Tjoe	Jane	JaneTjoe	All Features	9/25/2017	No	Yes	8	1327
	Hotline	Crisis	crisis	All Features		No	Yes	0	1465
	monti	meg	meg	All Features	9/20/2017	No	Yes	4	1489
	Sutarto	Jane	JaneS	All Features	11/8/2016	No	Yes	0	1567
	Keenan	Keenan	Keenan	All Features	4/22/2013	No	Yes	0	1604
	Wilson	Nina	nina	All Features	9/25/2017	No	Yes	2	1819

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

Users Summary CaseWorthy									
<div> <div>Filters</div> <div> <input type="text"/> </div> </div>									
Total Rows: 200									
	Last Name	First Name	Login Name	Role	Last Login Date	Account Locked	Active	# of Impersonators	User ID
		Administrator	Administrator	All Features	9/25/2017	No	Yes	0	11
	Bingel	Brian	Brian	All Features	9/25/2017	No	Yes	4	1305
	Argeris	Scott	sargeris	All Features	5/17/2017	No	Yes	0	1309
	Beck	Cameron	cameron	All Features	9/25/2017	No	Yes	1	1320
	Tjoe	Jane	JaneTjoe	All Features	9/25/2017	No	Yes	8	1327
	Hotline	Crisis	crisis	All Features		No	Yes	0	1465
	monti	meg	meg	All Features	9/20/2017	No	Yes	4	1489
	Sutarto	Jane	JaneS	All Features	11/8/2016	No	Yes	0	1567
	Keenan	Keenan	Keenan	All Features	4/22/2013	No	Yes	0	1604

Select Service Plans.

The Entity Service Plan Summary form appears.

Entity Service Plan Summary						+ Add New	
Total Rows: 1						Search	
	Description	Plan Begin - End Dates	View Note		% Complete	Plan ID	
	Josie Test	4/24/2017 - 4/24/2018			0.00 %	9	

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

Entity Service Plan Input

Entity Service Plan Dates

Begin Date 09/25/2017
Plan Projected End Date 09/25/2018

Actual Completed Date
Individual Assisting with Plan

Plan Information

Percent Complete

Plan Description

Case Note **Case Note**

Post Follow-up or Outcome ☐

Case Note and Signature(s).


Add Signature











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.

Find Organizations				Manage Categories	New Organization	Add New w/ Sharing	
Total Rows: 83							
Organization	Users	Created Date	Org ID				
 CaseWorthy	185	10/8/2009	12				
 Kingswood CAP	5	8/27/2010	1311				
 Test Org 1	1	8/27/2010	1312				
 Head Start	4	12/14/2010	1528				
 TX GLO	5	5/7/2012	2396				
 Catholic Charities	19	6/18/2012	2487				
 Org A	4	11/13/2012	3426				
 Org B	3	11/13/2012	3427				
 Org C	3	11/13/2012	3428				
 Org D	3	11/13/2012	3429				

A pop up menu appears.

Find Organizations				Manage Categories	New Organization	Add New w/ Sharing	
Total Rows: 83							
<div>Total</div> <div> Edit</div> <div> Data Sharing</div> <div> Providers</div> <div> Users</div> <div> Teams</div> <div> Approval Process</div> <div> Grantee Reimbursement Approval</div> <div> Head Start</div>							
Organization	Users	Created Date	Org ID				
 CaseWorthy	185	10/8/2009	12				
 Kingswood CAP	5	8/27/2010	1311				
 Test Org 1	1	8/27/2010	1312				
 Head Start	4	12/14/2010	1528				

Select Users from the pop-up menu.

The Users Summary page appears.

Users Summary CaseWorthy									
<div> <div>Filters</div> <div> <input type="text"/> </div> </div>									
Total Rows: 200									
	Last Name	First Name	Login Name	Role	Last Login Date	Account Locked	Active	# of Impersonators	User ID
		Administrator	Administrator	All Features	9/25/2017	No	Yes	0	11
	Bingel	Brian	Brian	All Features	9/25/2017	No	Yes	4	1305
	Argeris	Scott	sargeris	All Features	5/17/2017	No	Yes	0	1309
	Beck	Cameron	cameron	All Features	9/25/2017	No	Yes	1	1320
	Tjoe	Jane	JaneTjoe	All Features	9/25/2017	No	Yes	8	1327
	Hotline	Crisis	crisis	All Features		No	Yes	0	1465
	monti	meg	meg	All Features	9/20/2017	No	Yes	4	1489
	Sutarto	Jane	JaneS	All Features	11/8/2016	No	Yes	0	1567
	Keenan	Keenan	Keenan	All Features	4/22/2013	No	Yes	0	1604
	Wilson	Nina	nina	All Features	9/25/2017	No	Yes	2	1819

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

Users Summary CaseWorthy									
<div> <div>Filters</div> <div> <input type="text"/> </div> </div>									
Total									
	Login Name	Role	Last Login Date	Account Locked	Active	# of Impersonators	User ID		
	Administrator	All Features	9/28/2017	No	Yes	0	11		
	Brian	All Features	9/28/2017	No	Yes	4	1305		
	sargeris	All Features	5/17/2017	No	Yes	0	1309		
	cameron	All Features	9/25/2017	No	Yes	1	1320		
	JaneTjoe	All Features	9/28/2017	No	Yes	8	1327		
	crisis	All Features		No	Yes	0	1465		
	monti	meg	9/20/2017	No	Yes	4	1489		

Select Service Plans from the pop-up menu.

The Entity Service Plan Summary form appears.

...


Entity Service Plan Summary

+ Add New

Total Rows: 1

Search

	<div><div><div>✎ Edit</div><div><div>⚙️ Goals and Steps</div></div><div>🗑 Delete</div></div></div>	Plan Begin - End Dates	View Note	% Complete	Plan ID
+		4/24/2017 - 4/24/2018	<div>Q</div>	0.00 %	9

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.


...

Goals



Total Rows: 1



Add New Goals / Steps





	Goal Date	Goal Description	Target Date	% Complete	View Note	Required	Weight %	Type ID	Goal ID
	9/25/2017	1 Sample Goal	9/26/2017	50.00%		Yes	0	119	62


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.


Add Entity Goal and Steps																							
<div>Filters</div> <div> <div>Goal *</div> <div>Goal Date *</div> <div>Goal Completion Date</div> <div>Responsible Party *</div> <div>Weight %</div> </div> <div> <div>Target Date *</div> <div>Percent Complete</div> <div>Requirement *</div> </div>																							
<div> <div>▼ Add Follow Up or Outcome</div> <div> <div>Add Follow-Up</div> <div>Record Outcome</div> <div>Case Note</div> <div>Restriction *</div> </div> </div>																							
<div>Total Rows: 0</div> <table border="1"> <thead> <tr> <th>Step Description</th> <th>Step Date</th> <th>Baseline</th> <th>Target Date</th> <th>Target</th> <th>Status</th> <th>Completion Date</th> </tr> </thead> <tbody> <tr> <td colspan="7"></td> </tr> </tbody> </table>										Step Description	Step Date	Baseline	Target Date	Target	Status	Completion Date							
Step Description	Step Date	Baseline	Target Date	Target	Status	Completion Date																	
<div>Save Cancel</div>																							

Select a goal from the drop-down menu next to Goal. Select any applicable dates by clicking the  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



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



Goals								
Total Rows: 1								
 Edit  Steps  Delete	Goal Description	Target Date	% Complete	View Note	Required	Weight %	Type ID	Goal ID
	Sample Goal	9/26/2017	50.00%		Yes	0	119	62





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.


Goal * <input type="text" value="Cooking"/>		Target Date * <input type="text" value="05/31/2017"/>	
Goal Date * <input type="text" value="05/19/2017"/>		Percent Complete <input type="text"/>	
Goal Completion Date <input type="text"/>		Requirement * <input type="text" value="Yes"/>	
Responsible Party * <input type="text" value="Self"/>			
Weight % <input type="text"/>			
Add Follow Up or Outcome			
Add Follow-Up <input type="checkbox"/>		Record Outcome <input type="checkbox"/>	
Case Note 		Restriction * <input type="text" value="Shared"/>	

Total Rows: 2							
	Step Description	Step Date	Baseline	Target Date	Target	Status	Completion Date
<input checked="" type="checkbox"/>	Learn recipes	5/19/2017	1	5/19/2017	10	Open	
<input checked="" type="checkbox"/>	Take cooking class	5/19/2017	No	5/19/2017	Yes	Open	


 Save
  Cancel

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

Goals								
Total Rows: 1								
 Edit  Steps  Delete	Goal Description	Target Date	% Complete	View Note	Required	Weight %	Type ID	Goal ID
	Sample Goal	9/26/2017	50.00%		Yes	0	119	62



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.




Entity Goal Steps								
Total Rows: 3								
	Step Description	Baseline	Target	First Review	Second Review	Third Review	Fourth Review	Latest Progress
	Open Checking Account							
	Open Savings Account							
	30 days clean							

Click the  icon to view a pop-up menu.

Entity Goal Steps								
Total Rows: 3								
	Step Description	Baseline	Target	First Review	Second Review	Third Review	Fourth Review	Latest Progress
	Open Checking Account							
	 Edit							
	 Review							
	30 days clean							

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

Review								
<div> <div>Step</div> <div>Take cooking class</div> </div> <div> <div>Baseline</div> <div>No</div> </div> <div> <div>Target</div> <div>Yes</div> </div> <div> <div>Step Set Date</div> <div>05/19/2017</div> </div> <div> <div>Target Date</div> <div>05/19/2017</div> </div>								
+ Add Row								
	Review Date	Review Type	Value	Progress	System ID			
<input checked="" type="checkbox"/>	06/26/2017 				54			

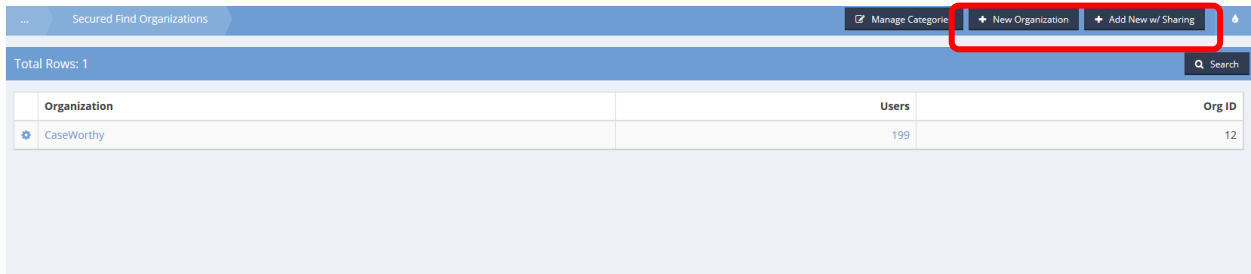
Fill in any appropriate information related to the Step in the top half of the form. In the bottom half of the form, enter information related to each review date. To add a new review date, click the  button. Save the form by clicking the  button. Click the  button to return to the Entity Goal Steps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

Secured Organizations

Entity Budget Summary

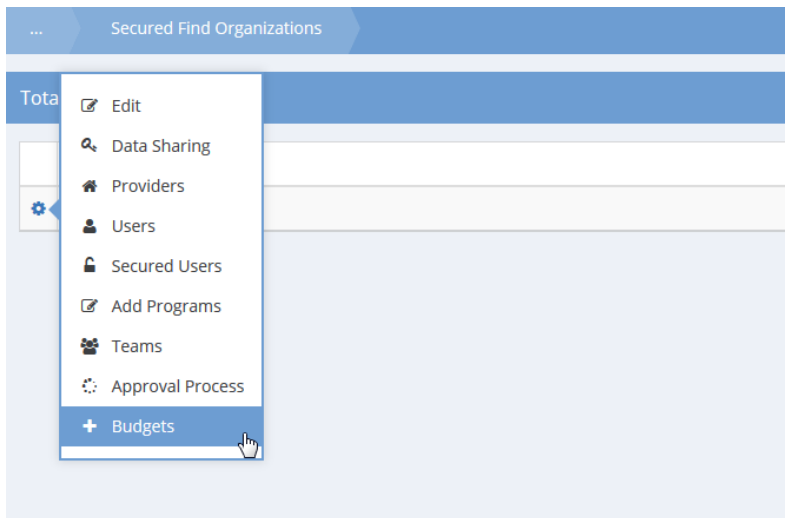
Objective: Create a budget for a secured organization.


Navigation: Administration>Setup>Secured Organizations



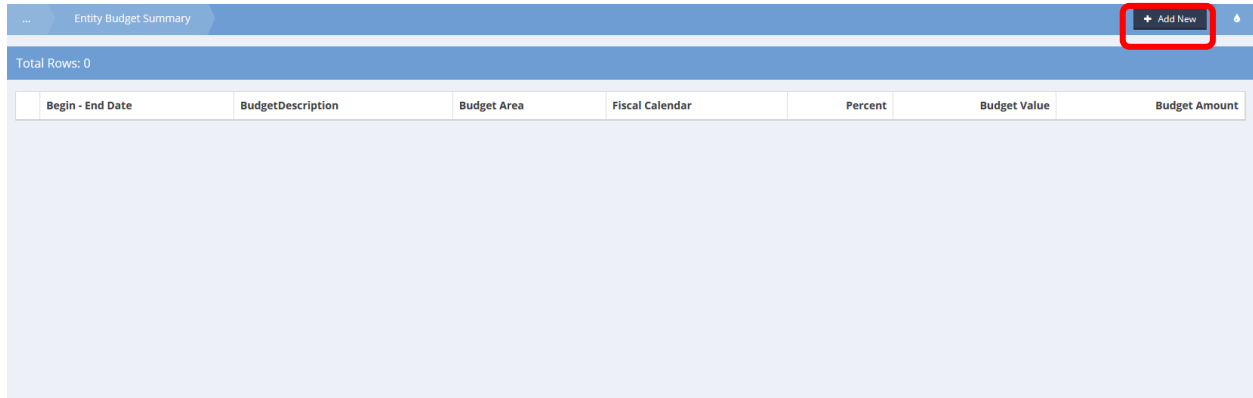
Secured Find Organizations			
Total Rows: 1		Search	
Organization	Users	Org ID	
CaseWorthy	199	12	

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.



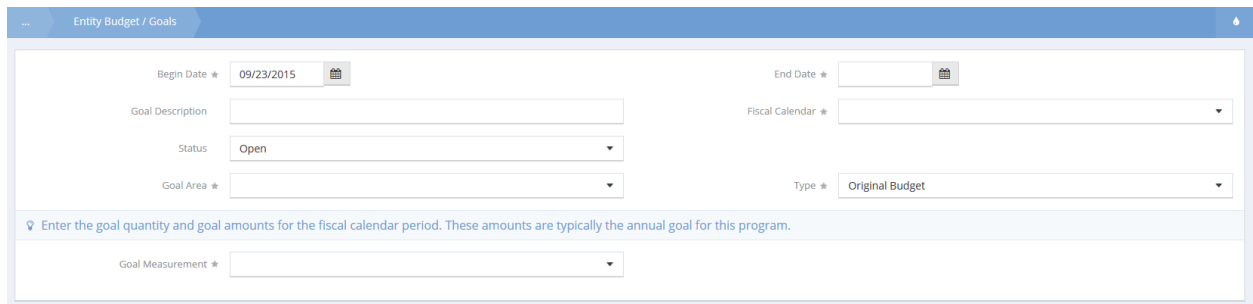
On the desired organization, click the action gear  and click Budgets.

The Entity Budget Summary form displays.



The Entity Budget Summary form displays a table with the following columns: Begin - End Date, BudgetDescription, Budget Area, Fiscal Calendar, Percent, Budget Value, and Budget Amount. The table is currently empty, showing "Total Rows: 0". A red box highlights the "+ Add New" button in the top right corner of the form.

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



The Entity Budget / Goals form displays the following fields:

- Begin Date: 09/23/2015 (with a calendar icon)
- End Date: (empty) (with a calendar icon)
- Goal Description: (text input)
- Fiscal Calendar: (dropdown menu)
- Status: Open (dropdown menu)
- Goal Area: (dropdown menu)
- Type: Original Budget (dropdown menu)
- Goal Measurement: (dropdown menu)

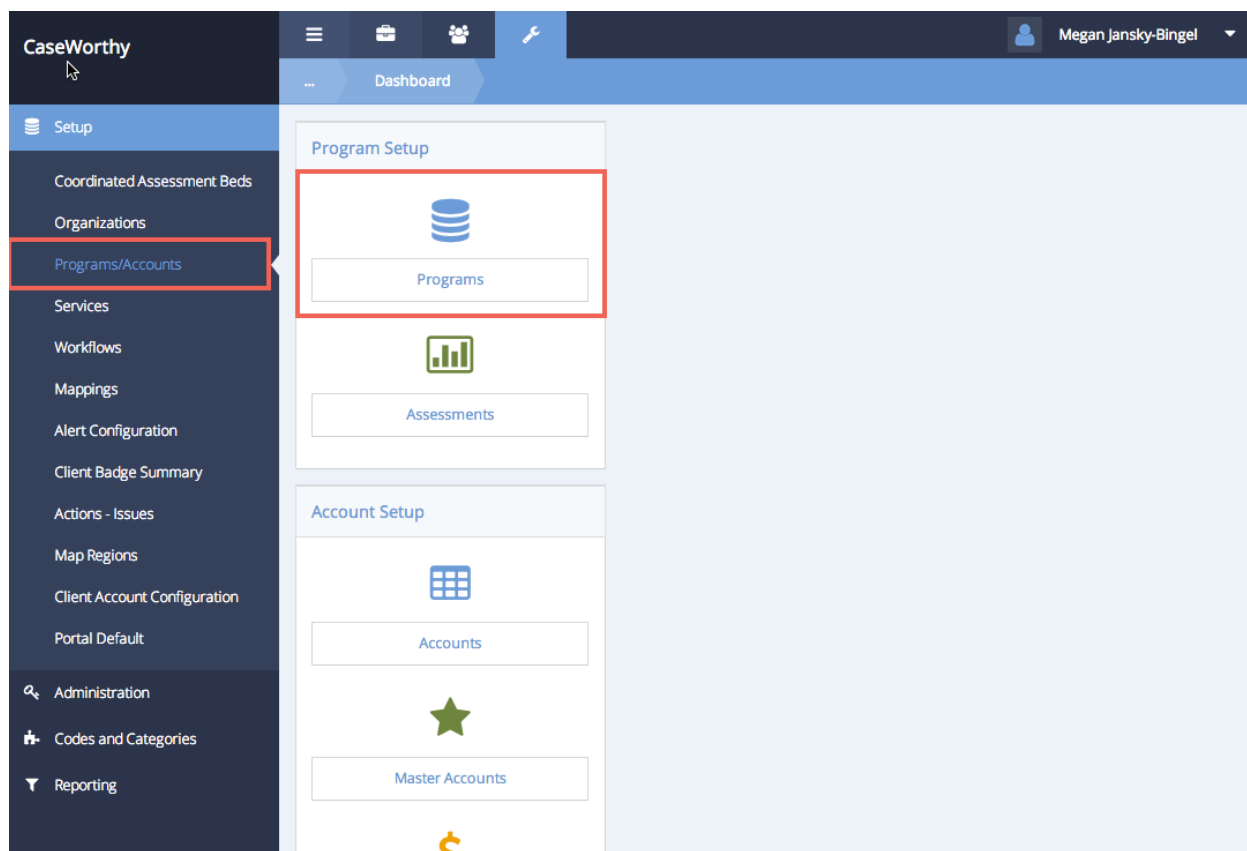
A note below the fields states: "Enter the goal quantity and goal amounts for the fiscal calendar period. These amounts are typically the annual goal for this program."

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

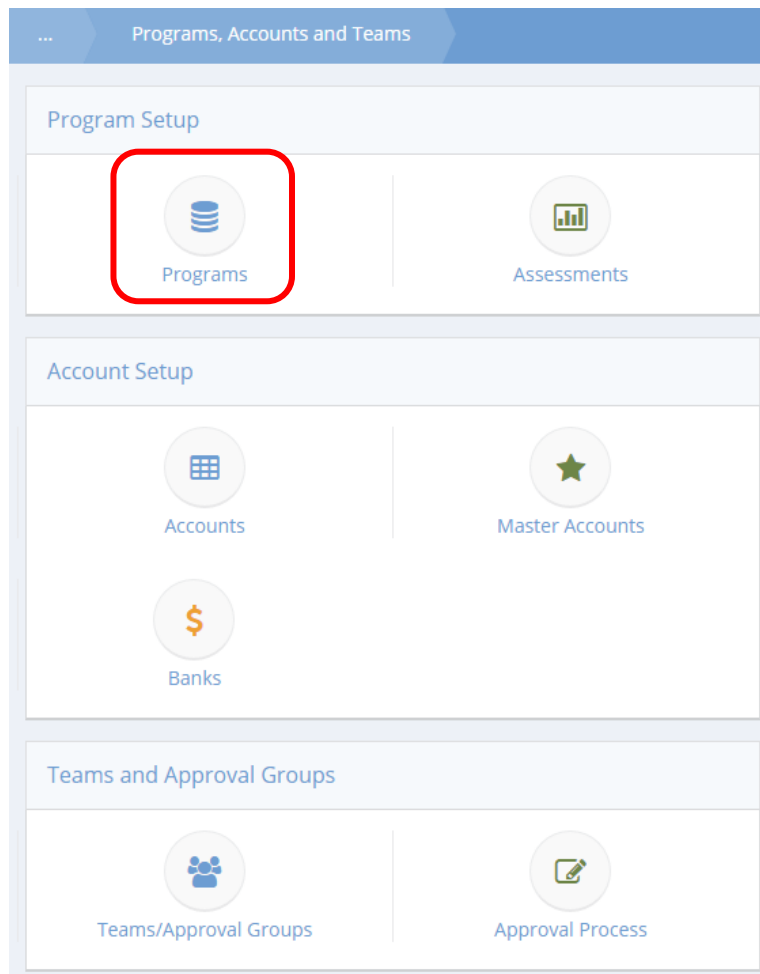
(Administration>Setup>Programs/Accounts>Programs)

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.

Programs

Program

Total Rows: 143

Search

	Program Name	Begin - End Dates	# of Svcs.	# of Accts	# of Assess.	# of Docs	Auto Exit Days	Reopen Days	Program ID
	Isample prog (HIV)	10/10/2011 - Present	20	19	2	6	30	30	151
	Edit	2/25/2013 - Present	25	8	2	13	30	30	98
	HMIS Setup	2/6/2013 - Present	2	0	2	3	-1	30	105
	Assessments	11/21/2012 - Present	27	7	4	0	-1	0	58
	Program Services	11/9/2012 - Present	14	3	2	0	60	30	94
	Program Service Eligibility	3/15/2013 - Present	22	8	3	0	-1	30	42
	Accounts / Funding Sources	6/25/2013 - Present	14	2	2	0	-1	30	43
	Documents	1/24/2013 - Present	32	5	5	0	-1	30	45
	Checklists	6/25/2013 - Present	4	3	1	0	-1	30	46
	Financial Types	5/15/2013 - Present	17	8	2	0	90	30	95
	Outcomes	5/15/2013 - Present	19	7	1	0	-1	30	47
	Self Sufficiency Matrix	7/1/2008 - Present	7	11	0	0	-1	30	48
	Program Budgets (Summary)		10	1	0	0	-1	0	49
	Program Contracts		3	0	2	0	-1	30	50
	Program Billing Service Summary								
	Follow-up Types	1/24/2013 - Present	8	1	1	0	1	30	104
	Delete	11/13/2012 - Present	48	5	2	0	90	0	40
	Basic HUD Project	10/1/2014 - Present	9	9	1	0	90	30	209

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

Program Follow-up Types

Add Row

	Follow-up Type	Follow-up Method	Days	Assign To Client	Assign To User	Required	
<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	1 Day	Housing Retention	1	True	True	True	
<input checked="" type="checkbox"/>	1 Day	Employment Retention	2	False	True	True	
<input checked="" type="checkbox"/>	7 Day	Schedule Follow Up	7	True	True	True	
<input checked="" type="checkbox"/>	7 Day	Issue	10	False	True	True	
<input checked="" type="checkbox"/>	7 Day	Housing Placement	8	True	True	True	

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

...

Programs

Manage Categories

+ Add New

Program

Total Rows: 211

Search

	Program Name	Begin - End Dates	# of Services	# of Accounts	# of Assessments	# of Docs	Auto Exit Days	Reopen Days	Program ID
	I1test	4/11/2016 - Open	1	1	1	2	90	30	340
	I1testprogram	4/1/2016 - Open	7	4	2	3	1	30	323
	Isample 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

Done

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

	Program Budgets (Summary)	4/1/2015 - Open	11	0
	Program Contracts	2/25/2013 - Open	25	8
	Program Billing Service Summary	1/1/2013 - Open	14	0
	Available Positions	1/1/2013 - Open	5	0
	Delete	3/1/2010 - Open	8	0
	_Weatherization Assistance	1/1/2012 - 7/31/2015	13	2





The Program Positions form displays.


...


Program Positions

Documentation Program

+ Add New

	Position	Position Start Date	Position End Date	Fiscal Calendar	Number of Positions Available	Base Salary
	Receptionist	8/1/2016		2013 Fiscal Calendar, Jan 01, 2013 - Dec 31, 2013	2	\$33,000.00
	Greeter	8/1/2016		2013 Fiscal Calendar, Jan 01, 2013 - Dec 31, 2013	1	\$20,000.00
	Executive Director	8/1/2016		2013 Fiscal Calendar, Jan 01, 2013 - Dec 31, 2013	1	\$500,000.00
	Director	8/1/2016		2013 Fiscal Calendar, Jan 01, 2013 - Dec 31, 2013	1	\$300,000.00

 Cancel

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.

... Program Position Edit Documentation Program

Position: Receptionist

Annual Salary: \$30000.00

Start Date: 08/01/2016


End Date:

Fiscal Calendar: 2013 Fiscal Calendar, Jan 01, 2013 - Dec 31, 2013

of Positions Available: 2

Save Cancel

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
<input checked="" type="checkbox"/>		Junior Accountant				\$0.00
<input checked="" type="checkbox"/>		Senior Accountant				\$0.00
<input checked="" type="checkbox"/>		dhdghdfhdf				\$0.00
<input checked="" type="checkbox"/>	2	Receptionist	8/1/2016		2013 Fiscal Calendar, Jan 01, 2013 - Dec 31, 2013	\$33,000.00
<input checked="" type="checkbox"/>		Sweeper				\$0.00
<input checked="" type="checkbox"/>		Chief Cook and Bottle washer				\$0.00
<input checked="" type="checkbox"/>	1	Greeter	8/1/2016		2013 Fiscal Calendar, Jan 01, 2013 - Dec 31, 2013	\$20,000.00
<input checked="" type="checkbox"/>		Programmer				\$0.00
<input checked="" type="checkbox"/>	1	Executive Director	8/1/2016		2013 Fiscal Calendar, Jan 01, 2013 - Dec 31, 2013	\$500,000.00
<input checked="" type="checkbox"/>	1	Director	8/1/2016		2013 Fiscal Calendar, Jan 01, 2013 - Dec 31, 2013	\$300,000.00
<input checked="" type="checkbox"/>		Child Development and Education Manager				\$0.00
<input checked="" type="checkbox"/>		Health Services Manager				\$0.00
<input checked="" type="checkbox"/>		Family and Community Partnerships Manager				\$0.00
<input checked="" type="checkbox"/>		Disability Services Manager				\$0.00
<input checked="" type="checkbox"/>		Fiscal Officer				\$0.00
<input checked="" type="checkbox"/>		Classroom Teacher				\$0.00

Save Cancel

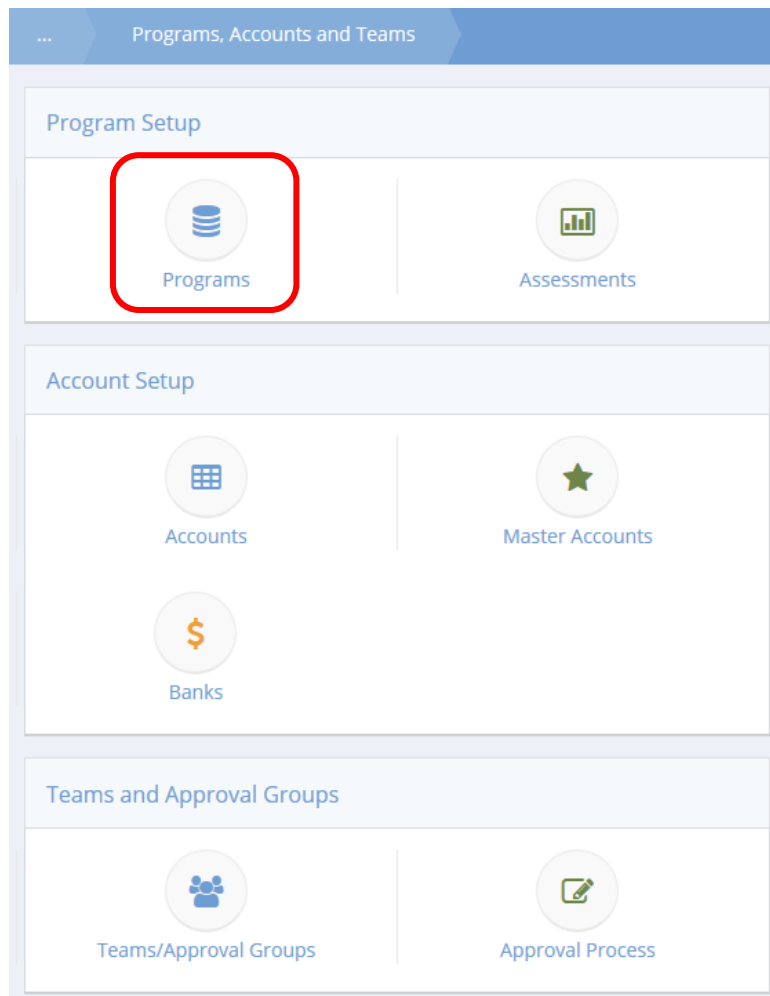
Click the clear checkbox ☐ icon associated with the desired position to add it to the program. The clear checkbox ☐ changes to blue ☒, indicating selection. The row expands.

<input checked="" type="checkbox"/>	1	Director	8/1/2016		2013 Fiscal Calendar, Jan 01, 2013 - Dec 31, 2013	\$300,000.00
<input checked="" type="checkbox"/>		Child Development and Education Man.	<input type="text"/>	<input type="text"/>	2013 Fiscal Calendar, Jan 01, 2013 - Dec 31, 2013	0.00
<input checked="" type="checkbox"/>		Health Services Manager				\$0.00
<input checked="" type="checkbox"/>		Family and Community Partnerships Manager				\$0.00

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

Program Financial Types

(Administration>Setup>Programs and Accounts)



Click the icon for Programs.

The Programs form displays.

Programs

Program

Total Rows: 140

Search

Program Name	Begin - End Dates	# of Svcs.	# of Accts	# of Assess.	# of Docs	Auto Exit Days	Reopen Days	Program ID
Isample prog (HIV)	10/10/2011 - Present	20	19	2	6	30	30	151
Edit	2/25/2013 - Present	25	8	2	13	30	30	98
HMIS Setup	2/6/2013 - Present	2	0	2	3	-1	30	105
Assessments	11/21/2012 - Present	27	7	4	0	-1	0	58
Program Services	11/9/2012 - Present	14	3	2	0	60	30	94
Program Service Eligibility	3/15/2013 - Present	22	8	3	0	-1	30	42
Accounts / Funding Sources	6/25/2013 - Present	14	2	2	0	-1	30	43
Documents	1/24/2013 - Present	32	5	5	0	-1	30	45
Checklists	6/25/2013 - Present	4	3	1	0	-1	30	46
Financial Types	5/15/2013 - Present	17	8	2	0	90	30	95
Outcomes	5/15/2013 - Present	19	7	1	0	-1	30	47
Self Sufficiency Matrix	5/15/2013 - Present	19	7	1	0	-1	30	47
Program Budgets (Summary)	7/1/2008 - Present	7	11	0	0	-1	30	48
Program Contracts		10	1	0	0	-1	0	49
Program Billing Service Summary		3	0	2	0	-1	30	50
Follow-up Types	1/24/2013 - Present	8	1	1	0	1	30	104
Delete	11/13/2012 - Present	48	5	2	0	90	0	40

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

Program Financial Types

Program Name

Total Rows: 19

Description	Poverty Reference	Sort Order
<input type="checkbox"/> Earned Income (i.e., employment income)		0
<input checked="" type="checkbox"/> Unemployment Insurance		
<input checked="" type="checkbox"/> Supplemental Security Income (SSI)		0
<input checked="" type="checkbox"/> Social Security Disability Income (SSDI)		0
<input checked="" type="checkbox"/> VA Service-Connected Disability Compensation		0
<input checked="" type="checkbox"/> Private disability insurance		0
<input checked="" type="checkbox"/> Temporary Assistance for Needy Families (TANF)		0
<input checked="" type="checkbox"/> General Public Assistance (GA)		0

~Nothing~
 Include in Both - Total Income and Poverty % Calc.
 Include in Poverty % Calculation Only
 Include in Total Income Only
 Not Applicable

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.

⚙	Documents		4/8/2013 - Open	1	
⚙	Checklists		1/1/2015 - Open	6	
⚙	Follow-up Types		2/1/2016 - Open	4	
⚙	Financial Types			6	
⚙	Grants - Financial Types			7	
⚙	Outcomes		8/12/2013 - Open	0	
⚙	Self Sufficiency Matrix		1/1/2016 - Open	21	
⚙	Program Budgets (Summary)		10/15/2013 - Open	8	
⚙	Program Contracts		9/1/2015 - 7/31/2016	7	
⚙	Program Billing Service Summary				

The Program Financial Types form displays.



...
Program Financial Types

Program Name


Total Rows: 45

	Description	Category Type	Sort Order
Income			
<input checked="" type="checkbox"/>	Contributions	Income	0
<input checked="" type="checkbox"/>	Special Events	Income	0
<input checked="" type="checkbox"/>	Legacies & Bequests	Income	0
<input checked="" type="checkbox"/>	United Way of Manatee County Allocation	Income	0
<input checked="" type="checkbox"/>	Manatee County Government Grant	Income	0
<input checked="" type="checkbox"/>	Other Government Grants & Revenues	Income	0
<input checked="" type="checkbox"/>	Foundation/ Trusts, Grants & Revenues	Income	0
<input checked="" type="checkbox"/>	Allocated by Federated Fund Raising Organizations	Income	0
<input checked="" type="checkbox"/>	Membership Dues - Individuals	Income	0
<input checked="" type="checkbox"/>	Program Service Fees	Income	0
<input checked="" type="checkbox"/>	Sales To Public	Income	0
<input checked="" type="checkbox"/>	Investment Income	Income	0
<input checked="" type="checkbox"/>	3rd Party Insurance/Miscellaneous Revenue/Other	Income	0

Save
Cancel


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

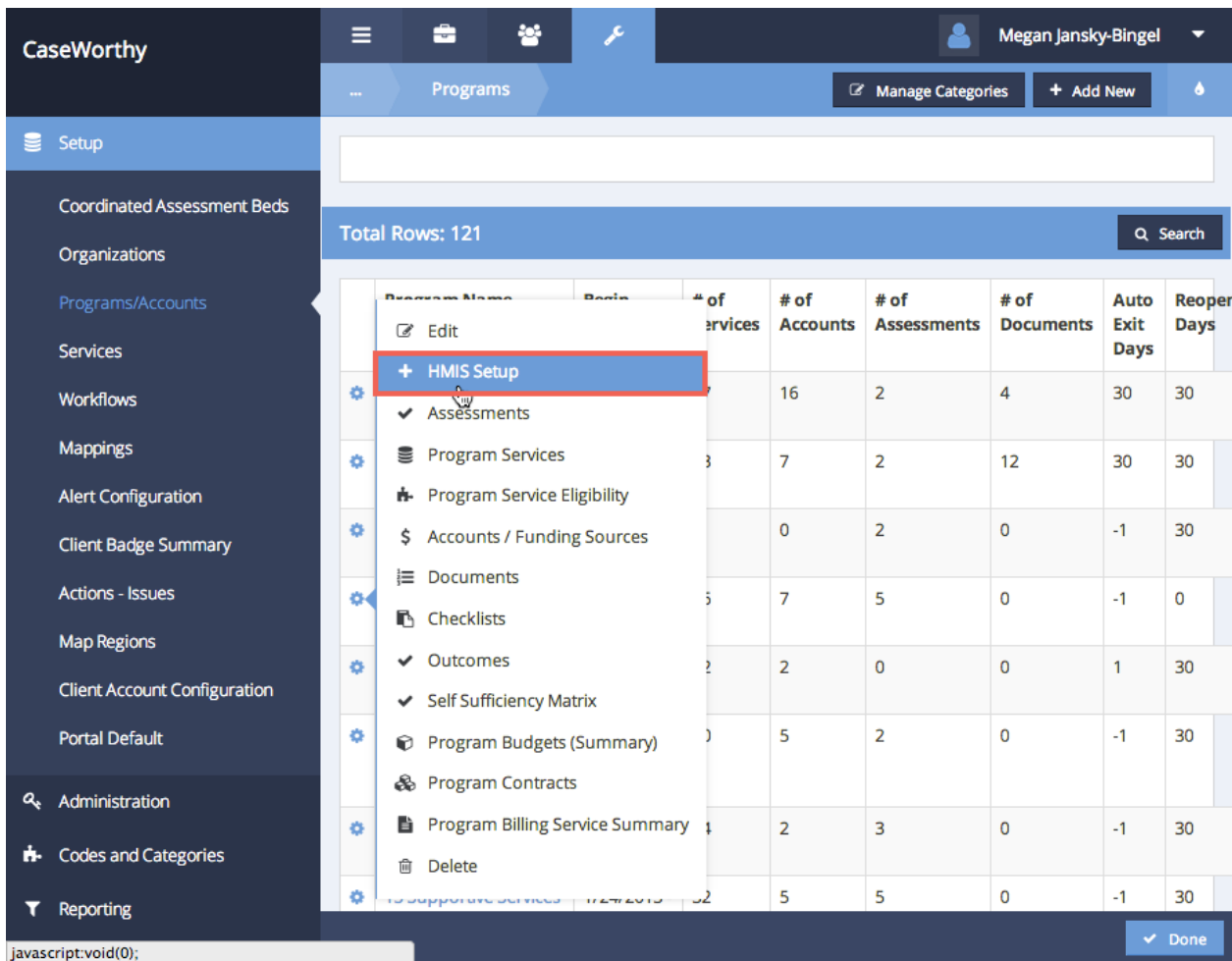
Income			
<input type="checkbox"/>	Contributions	Income	0
<input checked="" type="checkbox"/>	Special Events	Income	0
<input type="checkbox"/>	Legacies & Bequests	Income	0

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 screenshot shows the CaseWorthy System Administrator interface. On the left is a dark sidebar with a menu. The main area displays a table of programs. A context menu is open for one of the programs, with 'HMIS Setup' highlighted in blue.

CaseWorthy System Administrator Menu:

- 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


Programs Table:

Program Name	Base	# of services	# of Accounts	# of Assessments	# of Documents	Auto Exit Days	Reopen Days
...	16	2	4	30	30
...	...	3	7	2	12	30	30
...	0	2	0	-1	30
...	...	5	7	5	0	-1	0
...	...	2	2	0	0	1	30
...	5	2	0	-1	30
...	2	3	0	-1	30
...	...	2	5	5	0	-1	30

Context Menu Options:

- Edit
- HMIS Setup**
- Assessments
- Program Services
- Program Service Eligibility
- Accounts / Funding Sources
- Documents
- Checklists
- Outcomes
- Self Sufficiency Matrix
- Program Budgets (Summary)
- Program Contracts
- Program Billing Service Summary
- Delete

Buttons: Manage Categories, Add New, Search, Done

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  button on the bottom right side of the form.

CaseWorthy

...

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

Megan Jansky-Bingel

Project Name

16 HMIS (ES)

Project Identifier

46

Custom Project Identifier

HMIS

Project * Type

Emergency Shelter (ES)

project

Yes

Emergency * Shelter Project Type

Night by Night

Population

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
<input checked="" type="checkbox"/>	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 screenshot shows the CaseWorthy System Administrator interface. The left sidebar contains navigation links: 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, and Reporting. The main area displays a table of programs with columns: Program Name, Basic, # of services, # of Accounts, # of Assessments, # of Documents, Auto Exit Days, and Reopen Days. A context menu is open for a selected program, with the 'Assessments' option highlighted. The menu includes options: Edit, HMIS Setup, Assessments, Program Services, Program Service Eligibility, Accounts / Funding Sources, Documents, Checklists, Outcomes, Self Sufficiency Matrix, Program Budgets (Summary), Program Contracts, Program Billing Service Summary, and Delete. The bottom of the interface shows a status bar with 'javascript:void(0);' and a 'Done' button.

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.

The screenshot shows the CaseWorthy System Administrator interface. The top navigation bar includes the CaseWorthy logo, a hamburger menu, icons for a briefcase, a group of people, and a wrench. The user profile 'Megan Jansky-Bingel' is visible in the top right. The main header area shows 'Program Assessments' with a red box highlighting the '+ Add Assessment' button. The left sidebar lists various setup and administration options. The main content area contains a table of existing assessments.

	Form	Sort Order	Associate With	Program Assessment ID	Form ID
⚙	Non-HUD Financial	1	Member	129	92
⚙	HUD Program Data	2	Member	323	782

At the bottom right of the interface, there is a 'Done' button with a checkmark icon.

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 screenshot shows the 'Edit Program Assessment' form in the CaseWorthy system. The form is located in the 'Setup' section of the sidebar. The form fields are:

- Assessment *: Employment Assessment I
- Sort Order *: 1
- Events *: Choose Options... (dropdown menu with options: At Entry, During, At Exit)
- Required Rule: Edit Rule

The bottom right corner of the form has two buttons: Save and Cancel.

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.

The screenshot displays the CaseWorthy System Administrator interface. The top navigation bar includes the CaseWorthy logo, a hamburger menu, icons for a briefcase, a group of people, and a wrench. On the right, the user's name 'Megan Jansky-Bingel' is shown with a dropdown arrow. Below the navigation bar, the main content area is titled 'Program Assessments' with a '+ Add Assessment' button. A table lists three assessment forms. The left sidebar contains a 'Setup' section with various configuration options and an 'Administration' section with 'Codes and Categories' and 'Reporting'.

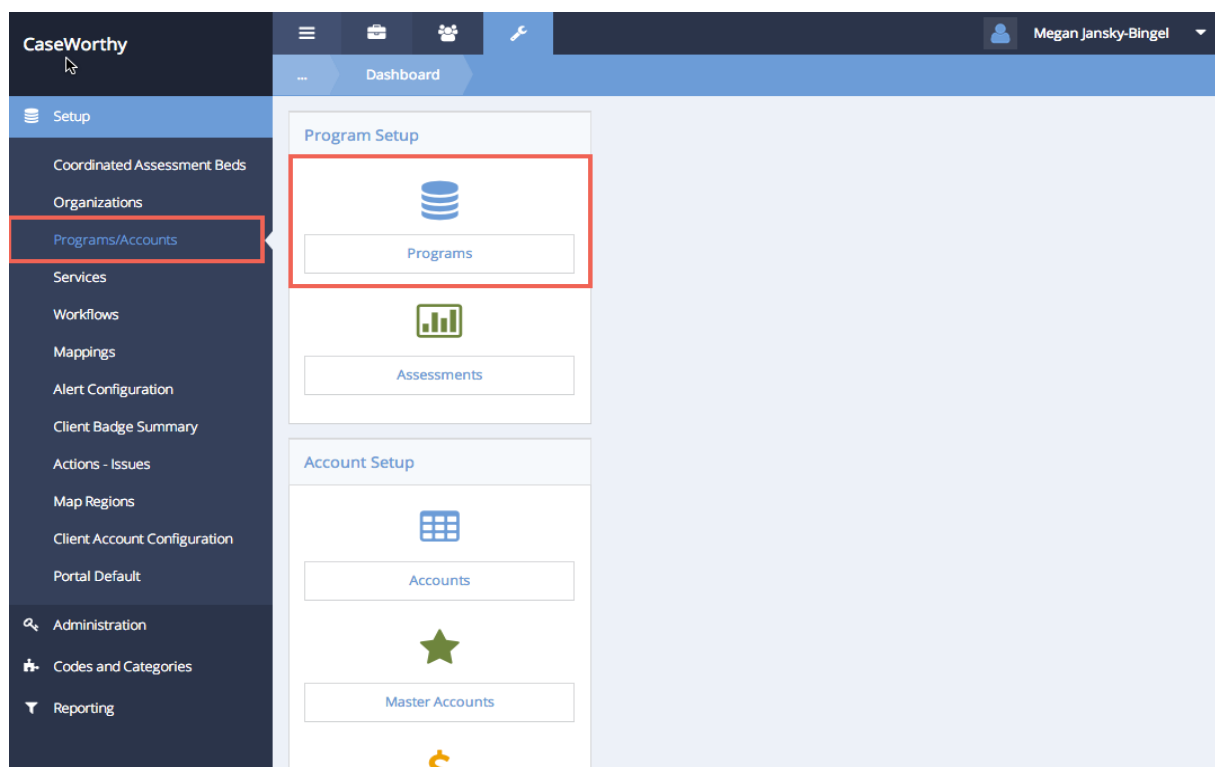
	Form	Sort Order	Associate With	Program Assessment ID	Form ID
⚙	Non-HUD Financial	1	Member	129	92
⚙	Employment Assessment Input Form	1	Member	440	221
⚙	HUD Program Data	2	Member	323	782


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 screenshot shows the CaseWorthy System Administrator interface. The left sidebar contains navigation links: 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, and Reporting. The main area is titled 'Programs' and shows a table with 121 rows. A context menu is open over the table, listing various actions: Edit, HMIS Setup, Assessments, Program Services, Program Service Eligibility, Accounts / Funding Sources, Documents, Checklists, Outcomes (highlighted with a red box), Self Sufficiency Matrix, Program Budgets (Summary), Program Contracts, Program Billing Service Summary, and Delete. The 'Outcomes' option is highlighted with a red box.

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

...

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

Megan Jansky-Bingel

	Outcome Domain	OutcomeDomain.DomainID	
<input checked="" type="checkbox"/>	Adoption	63	
<input checked="" type="checkbox"/>	Adult Education	7	
<input checked="" type="checkbox"/>	Adult Education (Self Sufficiency Matrix)	84	
<input checked="" type="checkbox"/>	Automobiles Sector	38	
<input checked="" type="checkbox"/>	Child Care (Self Sufficiency Matrix)	81	
<input checked="" type="checkbox"/>	Childcare	5	
<input checked="" type="checkbox"/>	Children's Education	6	
<input checked="" type="checkbox"/>	Children's Education (Self Sufficiency Matrix)	89	
<input checked="" type="checkbox"/>	Citizenship	65	
<input checked="" type="checkbox"/>	Community Involvement	15	
<input checked="" type="checkbox"/>	Community Involvement (Self Sufficiency Matrix)	95	
<input checked="" type="checkbox"/>	Credit History	18	
<input checked="" type="checkbox"/>	Elderly Disabled (Self Sufficiency Matrix)	99	
<input checked="" type="checkbox"/>	Employment	2	
<input checked="" type="checkbox"/>	Employment (Self Sufficiency Matrix)	80	

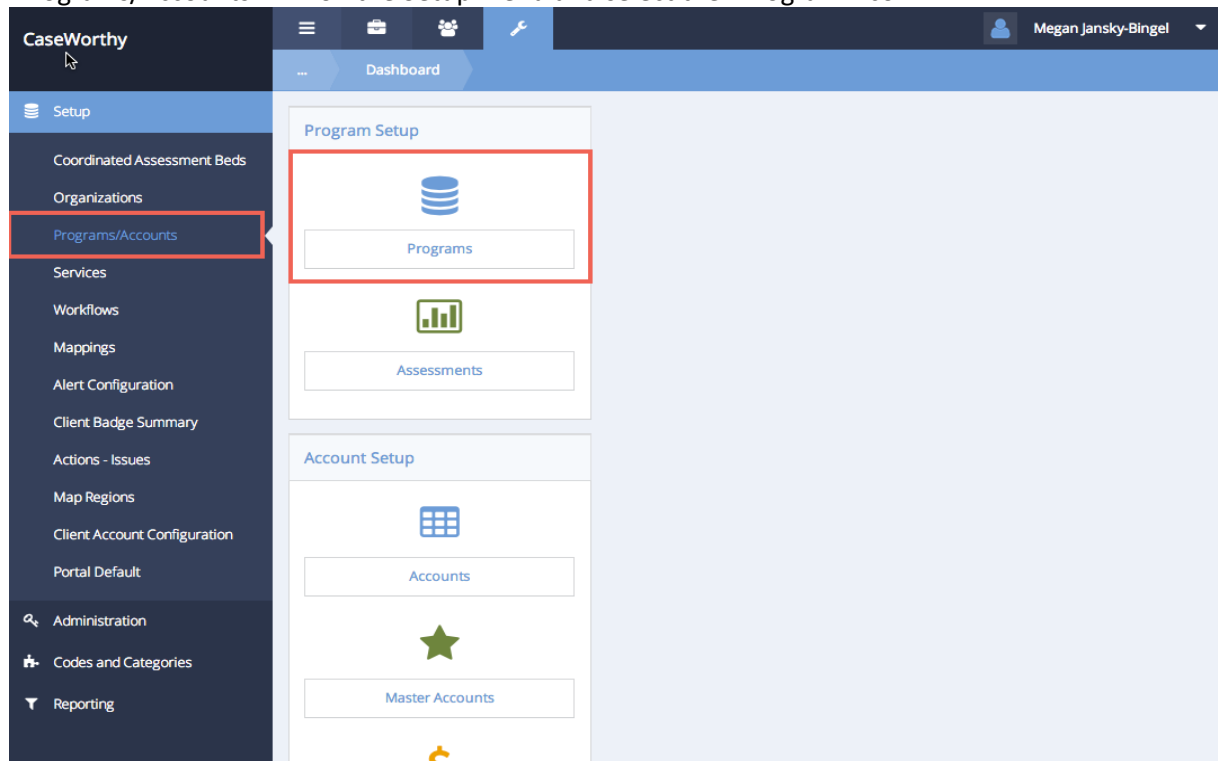
Save


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.

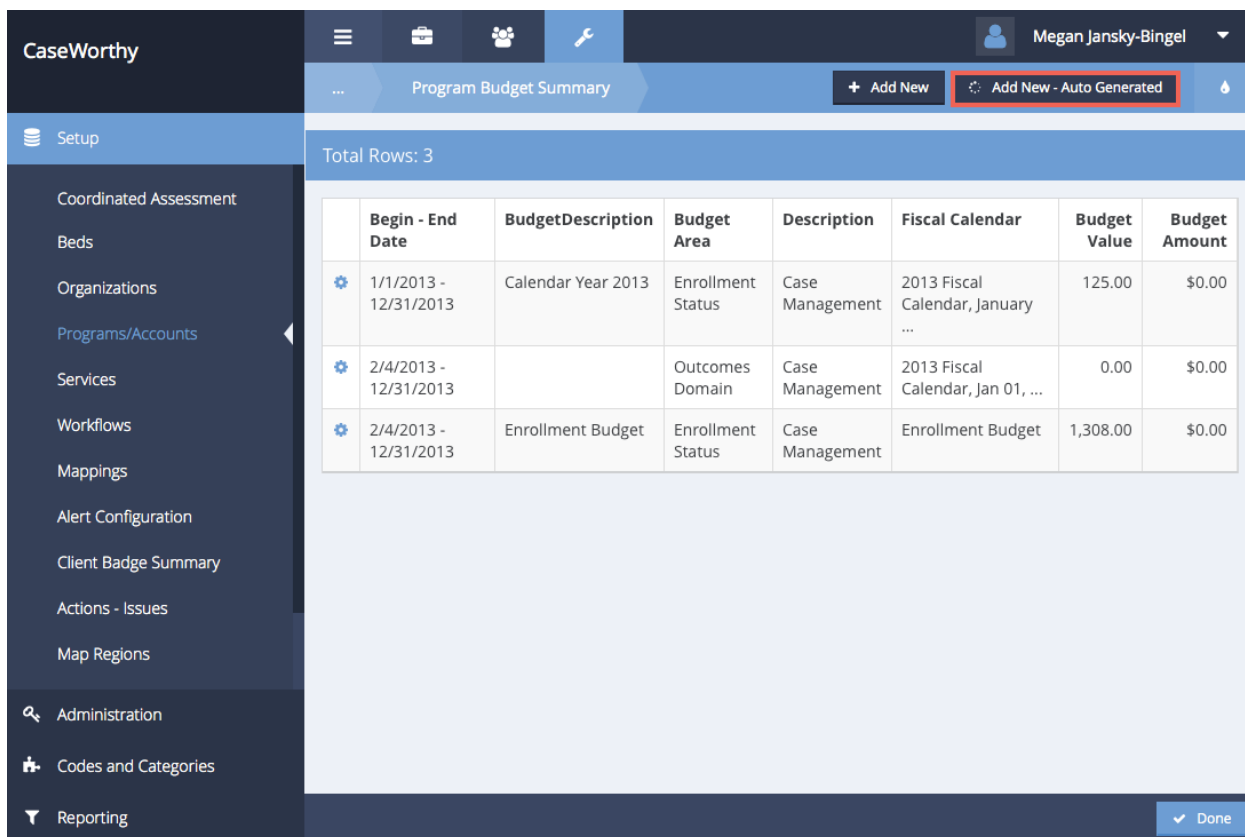


From the Program Summary form, find the desired program, click the action gear , and select “Program Budgets Summary”.

The screenshot shows the CaseWorthy System Administrator interface. The top navigation bar includes the CaseWorthy logo, a hamburger menu, icons for a briefcase, people, and a wrench, and a user profile for Megan Jansky-Bingel. The main header is 'Programs', with buttons for 'Manage Categories' and '+ Add New'. A search bar is present. The left sidebar lists various setup and administration options. The main content area displays a table with columns: Program Name, Basis, # of Services, # of Accounts, # of Assessments, # of Documents, and Au Ex Da. A context menu is open over a row, listing actions: Edit, HMIS Setup, Assessments, Program Services, Program Service Eligibility, Accounts / Funding Sources, Documents, Checklists, Outcomes, Self Sufficiency Matrix, Program Budgets (Summary) (highlighted), Program Contracts, Program Billing Service Summary, and Delete. A 'Done' button is at the bottom right.

Program Name	Basis	# of Services	# of Accounts	# of Assessments	# of Documents	Au Ex Da
		7	16	2	4	30
		3	7	2	12	30
			0	2	0	-1
		5	7	5	0	-1
		2	2	0	0	1
		0	5	2	0	-1
		2	2	3	0	-1

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



CaseWorthy

Program Budget Summary

+ Add New Add New - Auto Generated

Setup

Coordinated Assessment

Beds

Organizations

Programs/Accounts

Services

Workflows

Mappings

Alert Configuration

Client Badge Summary

Actions - Issues

Map Regions

Administration


Codes and Categories

Reporting

Total Rows: 3

	Begin - End Date	BudgetDescription	Budget Area	Description	Fiscal Calendar	Budget Value	Budget Amount
⚙	1/1/2013 - 12/31/2013	Calendar Year 2013	Enrollment Status	Case Management	2013 Fiscal Calendar, January ...	125.00	\$0.00
⚙	2/4/2013 - 12/31/2013		Outcomes Domain	Case Management	2013 Fiscal Calendar, Jan 01, ...	0.00	\$0.00
⚙	2/4/2013 - 12/31/2013	Enrollment Budget	Enrollment Status	Case Management	Enrollment Budget	1,308.00	\$0.00

Done

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.

CaseWorthy

Program Budget - ECM Auto Generated Monthly Detail

Megan Jansky-Bingel

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 * 11/14/2014

End Date * 12/31/2014

Budget * Description Calendar Year 2014

Fiscal * Calendar 2014 Fiscal Calendar, Jan 1

Status Open

Budget Area * Enrollment Status

Type * Original Budget

Enrollments * Turned Away/Denied


Enter the budget quantity and budget amounts for the fiscal calendar period. These amounts are typically the annual budgets for this program. The system will generate the budget details for each month. Partial months are prorated based on the number of days, but always rounded to a whole number.

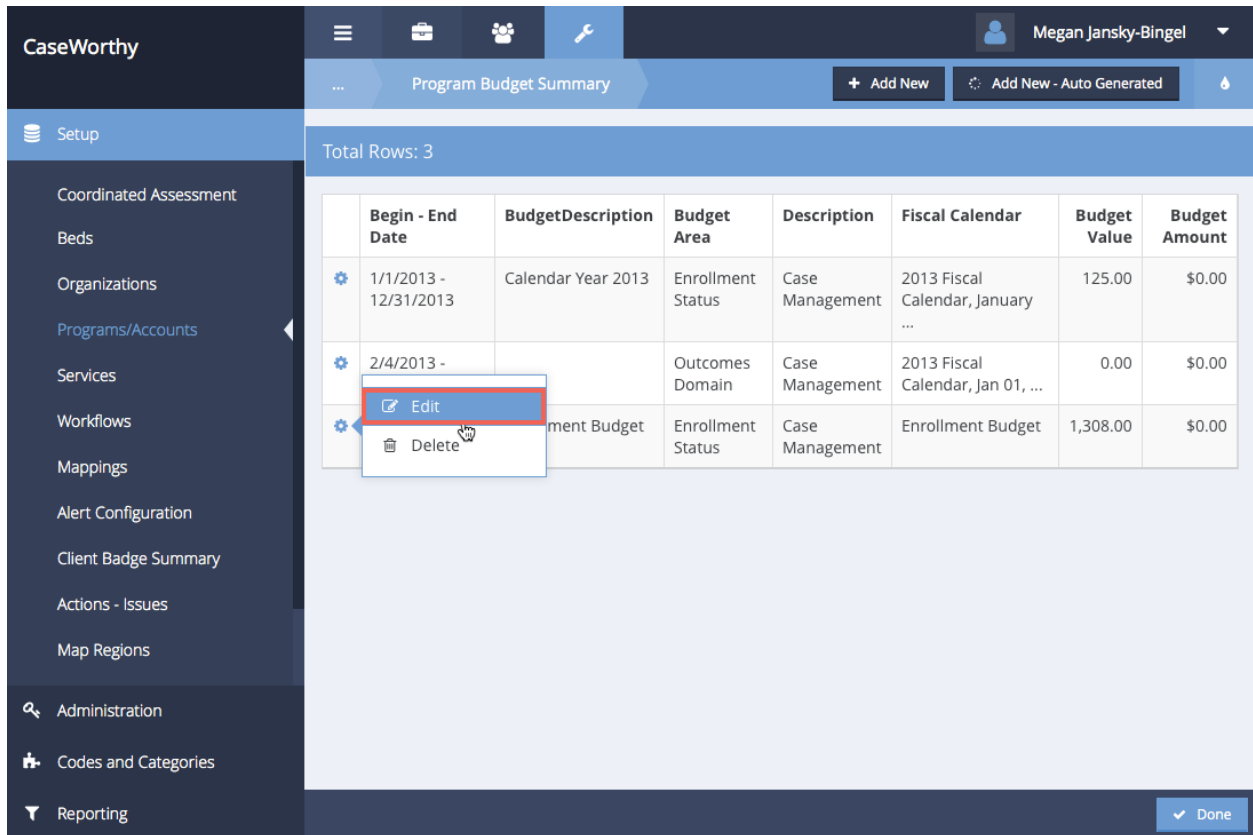
Budget * Measurement Quantity

Budget * Quantity 125

You can optionally budget for "Specific Users" for each month. i.e. If you select two users in the multi-select option, the system will generate a budget for each user for each month. Partial months are prorated based on the number of the days prior to the first of the following month and always round to a whole number. This field is not required and in most cases left blank.

Save Cancel

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".



The screenshot displays the CaseWorthy System Administrator interface. The top navigation bar includes the CaseWorthy logo, a hamburger menu, icons for a briefcase, users, and a wrench, and a user profile for Megan Jansky-Bingel. The main header shows the current view as 'Program Budget Summary' with buttons for '+ Add New' and '+ Add New - Auto Generated'. The left sidebar contains a 'Setup' section with various options like Coordinated Assessment, Beds, Organizations, Programs/Accounts, Services, Workflows, Mappings, Alert Configuration, Client Badge Summary, Actions - Issues, and Map Regions. Below this is an 'Administration' section with 'Codes and Categories' and a 'Reporting' section. The main content area shows a table titled 'Total Rows: 3'. The table has 8 columns: 'Begin - End Date', 'BudgetDescription', 'Budget Area', 'Description', 'Fiscal Calendar', 'Budget Value', and 'Budget Amount'. The first row shows a date range of 1/1/2013 - 12/31/2013, BudgetDescription 'Calendar Year 2013', Budget Area 'Enrollment Status', Description 'Case Management', Fiscal Calendar '2013 Fiscal Calendar, January ...', Budget Value '125.00', and Budget Amount '\$0.00'. The second row shows a date range of 2/4/2013 - ..., BudgetDescription 'Outcomes Domain', Budget Area 'Case Management', Description '2013 Fiscal Calendar, Jan 01, ...', Budget Value '0.00', and Budget Amount '\$0.00'. The third row shows a date range of ..., BudgetDescription 'Enrollment Budget', Budget Area 'Enrollment Status', Description 'Case Management', Fiscal Calendar 'Enrollment Budget', Budget Value '1,308.00', and Budget Amount '\$0.00'. A context menu is open over the first row, showing 'Edit' and 'Delete' options. The 'Edit' option is highlighted with a red box.

	Begin - End Date	BudgetDescription	Budget Area	Description	Fiscal Calendar	Budget Value	Budget Amount
⚙	1/1/2013 - 12/31/2013	Calendar Year 2013	Enrollment Status	Case Management	2013 Fiscal Calendar, January ...	125.00	\$0.00
⚙	2/4/2013 - ...	Outcomes Domain	Case Management	2013 Fiscal Calendar, Jan 01, ...	0.00	\$0.00	
⚙	...	Enrollment Budget	Enrollment Status	Case Management	Enrollment Budget	1,308.00	\$0.00

When finished viewing/editing, click the  Save button.

CaseWorthy

...

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
<input checked="" type="checkbox"/>	Enrollment Budget		Original Budget	Enrollment Budget	54.00	\$0.00	2/4/2013	2/28/2013
<input checked="" type="checkbox"/>	Enrollment Budget		Original Budget	Enrollment Budget	60.00	\$0.00	3/1/2013	3/31/2013
<input checked="" type="checkbox"/>	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						
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.

of Linked
 Programs ✕

Programs 🔍

Program

Total Rows: 4 🔍 Search

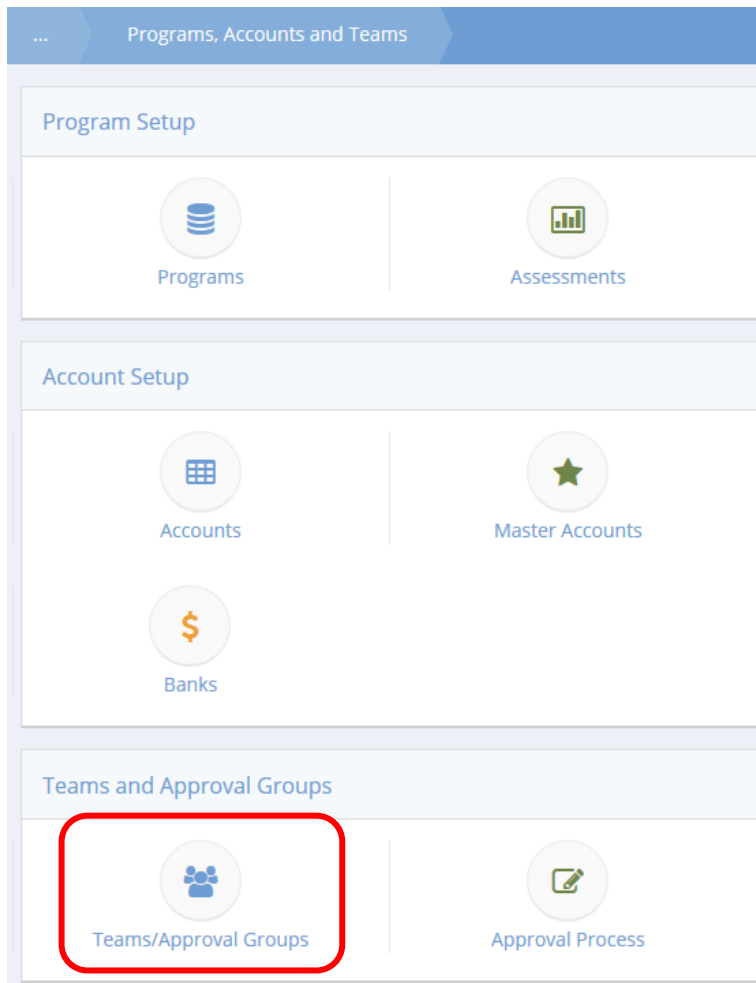
Program Name	# of Assessments	# of Docs	Auto Exit Days	Reopen Days	Begin - End Dates	# of Services	# of Accounts	Program ID
! FinancialHMIS	1	9	90	30	4/11/2016 - Open	5	2	346
! financialjane	1	2	90	30	4/11/2016 - Open	1	1	340
! sample prog (HIV)	1	7	30	0	10/10/2011 - Open	21	19	151
Test 2 Assessments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

⌵ Done

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/Approval Groups Manage Categories + Add new

Total Rows: 54

	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.

... Team Categories + Add Row

Total Rows: 2


<input checked="" type="checkbox"/>	Description *	Category ID
<input checked="" type="checkbox"/>	Incident Management	1
<input checked="" type="checkbox"/>	Service Requests	2

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.

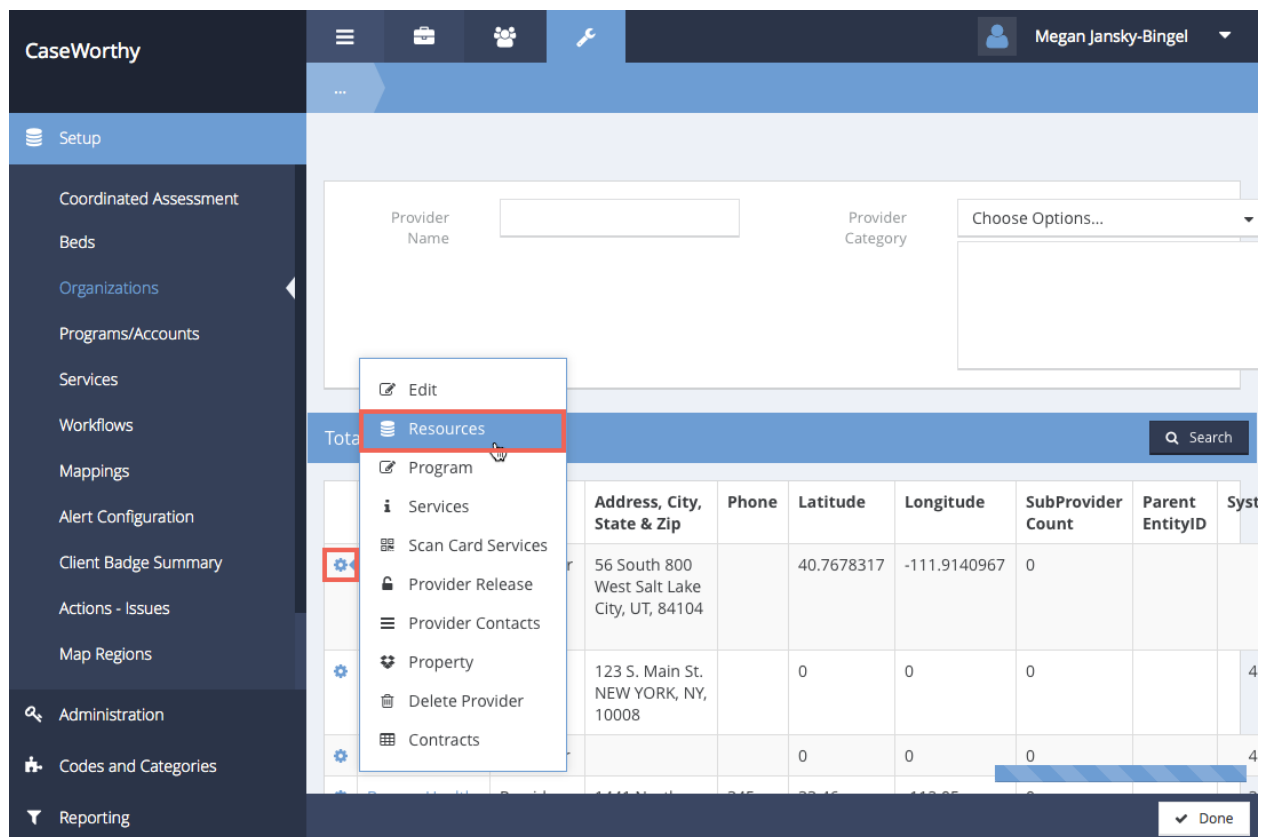
Within CaseWorthy™, housing environments and classrooms are associated with providers, or physical sites. Within those sites, are resources – a defined physical space – such as a room, an apartment, a computer lab, etc. Each space may be used for different purposes at different times – the room may be 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 screenshot shows the CaseWorthy System Administrator interface. On the left is a dark sidebar with a menu. The 'Organizations' menu item is highlighted with a red rectangle. In the center, a dropdown menu is open, showing options: Edit, Data Sharing, Providers (highlighted with a red rectangle and a mouse cursor), Users, Teams, and Approval Process. The main area displays a table of organizations with columns for organization name, Users, and System ID. A 'Done' button is at the bottom right.

	Users	System ID
	0	8314
	117	12
	11	2487
	0	3728
	3	3574
Chrysalis Center Inc.	0	3417
Community Health Resources	0	3418
Eric Organization	0	4174
Head Start	3	1528
Jane Test	1	4173
Jane1	0	7958
Jane2	0	7960
Jane6	0	7962
jane7	0	7965
JaneTest100	0	8149

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.

CaseWorthy

...

Edit Resource

Setup

Coordinated Assessment

Beds

Organizations

Programs/Accounts

Services

Workflows

Mappings

Alert Configuration

Client Badge Summary

Actions - Issues

Map Regions

Administration

Codes and Categories

Reporting


Select a category, name and capacity for the usage.

Category * Classroom

Resource Name * Classroom 1

Capacity * 30

Save Cancel

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

CaseWorthy

Resources

+ Add Resource

Category Resource Name

Search

Usages - Class Room / Housing

Resource Capacity	Units / Slots	Resource ID
0.00		1112
0.00		87

Done

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.

The screenshot displays the CaseWorthy 'Resource Usage' form. The top navigation bar includes the CaseWorthy logo, a hamburger menu, and user information for Megan Jansky-Bingel. The breadcrumb trail shows the path: Administration > Setup > Organizations > Providers > Resources > Usages. The main content area features a 'Usage Name' input field at the top. Below it, a status bar indicates 'Total Rows: 0' with a search icon. A table with the following columns is present: Usage Name, Attendance Service, Program Name, Start - End Date, Enrollment Type, Capacity, and Enrolled Today. The table is currently empty. In the top right corner of the form, there is a button labeled '+ Add Usage' which is highlighted with a red box. At the bottom right, there is a 'Done' button.

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	<input type="checkbox"/>

Allowable Clients and Accessibility

Allow Females (Age 18+)	<input checked="" type="checkbox"/>	Allow Males (Age 18+)	<input checked="" type="checkbox"/>
Allow Children	<input checked="" type="checkbox"/>	Handicap Accessible	<input checked="" type="checkbox"/>
Allow Children * Age	Younger than 14		
Allow Transgender	<input checked="" type="checkbox"/>		
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

Type

Automatic Enrollment

☐

Enrollment Required

☒

Use day(s) as Service Units

☒

Enrollment Service

Attendance Service

Is Multiple Services

☐

Unit Of Measure

Prorate Type

Service

If "Automatic Check-In" is selected, enrolled clients will automatically be re-checked in at each defined interval indicated in the recurrence. If "Include Dates Between" is checked, when clients are checked in, they will be checked in from the date of the selected check-in until the date of the next scheduled check-in interval.

Automatic Check-In

☐

Include Dates Between

☐

Recurrence Start/End times must be in military time i.e. 12 midnight is 00:00, 1 pm is 13:00. Single-digit times must have a leading zero, i.e. 9 am is 09:00.

Recurrence *

☒ Daily
 ☐ Weekly
 ☐ BiWeekly
 ☐ Monthly
 ☐ Semi Monthly
 ☐ Annually

Day	Start	End	All Day
Everyday	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> All Day

Class Syllabus

Save

Cancel

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.

Resource Capacity and Slot Allocation

Min Capacity *

Max Capacity *

Slot Assign Event *

Course

Enrollment/Attendance Service Look-Up

Select Service Type Lookup ✕

Description

Service Category


Service Usage

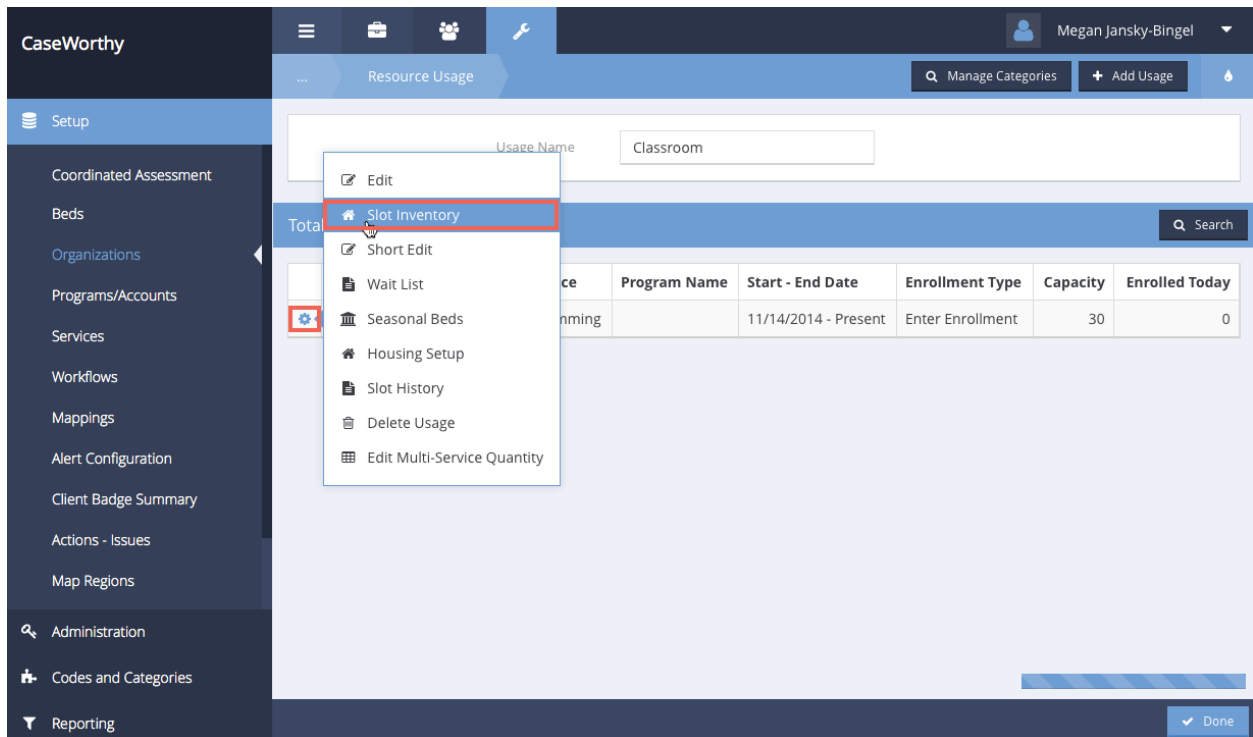
1 Search

Description	Service Category	Service Usage
AA Meeting	Education	Direct
Abstinence Education	Education	Direct
ADC	DD - Employment 2011	Direct
Administrative Time	Project Related	Direct
Adoption Registry	Case Management	Direct
Adoption Support Group	Case Management	Direct
Adult Counseling Service	Case Management	Direct
Adult Day Care	Day-Activity	Direct
AIDS Pharmaceutical Assistance	RW Core	Direct
Alcohol Counseling	Substance Abuse	Direct

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”.



The screenshot shows the CaseWorthy interface. On the left is a navigation menu with categories: Setup, Organizations, Services, Workflows, Mappings, Alert Configuration, Client Badge Summary, Actions - Issues, Map Regions, Administration, Codes and Categories, and Reporting. The 'Setup' menu is expanded, showing options like Coordinated Assessment, Beds, Organizations, Programs/Accounts, Services, Workflows, Mappings, Alert Configuration, Client Badge Summary, Actions - Issues, and Map Regions. The 'Organizations' menu item is highlighted. In the main content area, the 'Resource Usage' section is active, showing a form for 'Usage Name' (Classroom) and a table of resource usage. A dropdown menu is open, showing options: Edit, Slot Inventory (highlighted with a red box), Short Edit, Wait List, Seasonal Beds, Housing Setup, Slot History, Delete Usage, and Edit Multi-Service Quantity. The table below has columns: Program Name, Start - End Date, Enrollment Type, Capacity, and Enrolled Today. One row is visible with Program Name 'nning', Start - End Date '11/14/2014 - Present', Enrollment Type 'Enter Enrollment', Capacity '30', and Enrolled Today '0'. At the bottom right is a 'Done' button.

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.

CaseWorthy

Resource Slots

Manage Categories Add Row Jane Test

Usage Randomizer Type

Total Rows: 10

Bed / Slot Description *	Slot Type *	Start Date	End Date	Category	CA Bed	Target Population	Status *	Availability
<input checked="" type="checkbox"/> Slot 1	Slot						Available	
<input checked="" type="checkbox"/> Slot 10	Slot	11/21/2014	12/31/9999	Choose Options...			Available	

Address1 Address2 City State ZipCode HMIS Participating Bed Yes


Rent * Amount 0.00 Is Accessible? Is Electric Outlet?

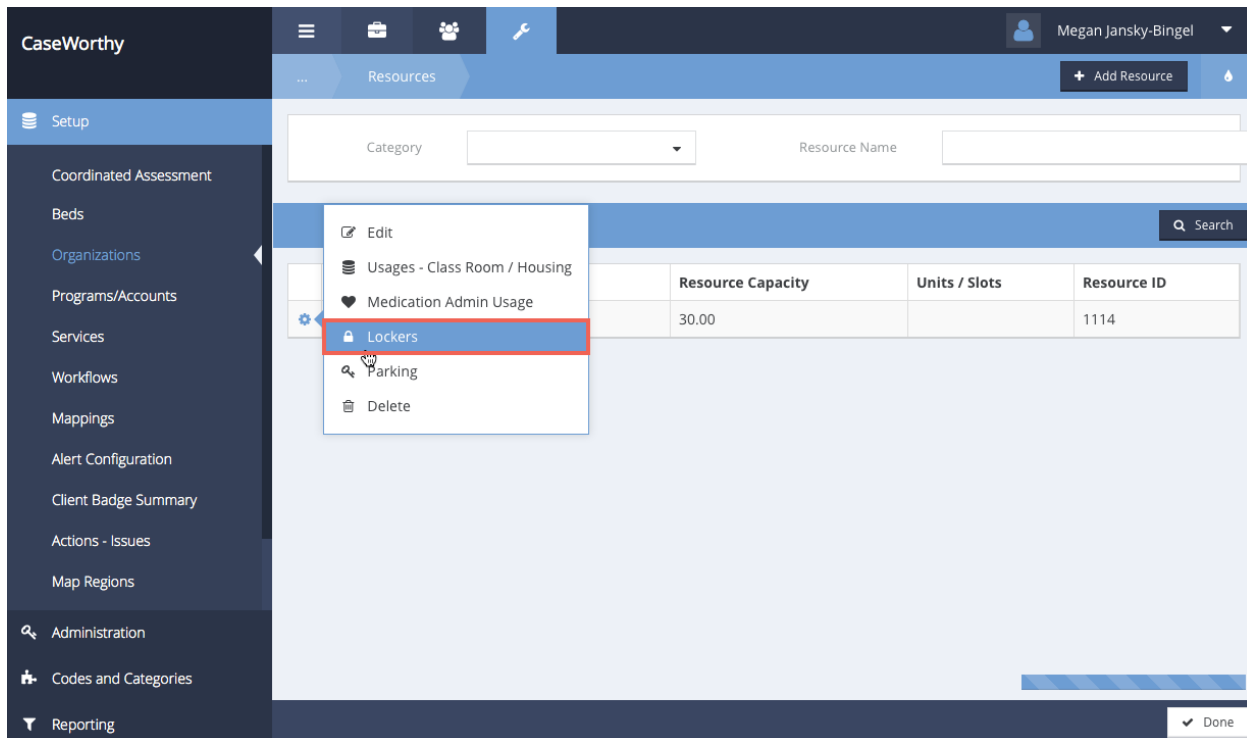
Locker

Save Cancel

Lockers

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

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



The screenshot shows the CaseWorthy System Administrator interface. On the left is a dark sidebar with a menu including Setup, Coordinated Assessment, Beds, Organizations, Programs/Accounts, Services, Workflows, Mappings, Alert Configuration, Client Badge Summary, Actions - Issues, Map Regions, Administration, Codes and Categories, and Reporting. The main area is titled 'Resources' and has a '+ Add Resource' button. Below this are input fields for 'Category' and 'Resource Name', and a 'Search' button. A table displays resource information with columns for 'Resource Capacity', 'Units / Slots', and 'Resource ID'. One row is visible with a capacity of 30.00 and ID 1114. A context menu is open over the table, showing options: Edit, Usages - Class Room / Housing, Medication Admin Usage, Lockers (highlighted with a red box), Parking, and Delete. The user's name 'Megan Jansky-Bingel' is in the top right corner, and a 'Done' button is at the bottom right.

Resource Capacity	Units / Slots	Resource ID
30.00		1114

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

...

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 *

Locker 1

Status *

Available

Handicap

Type


Lockers

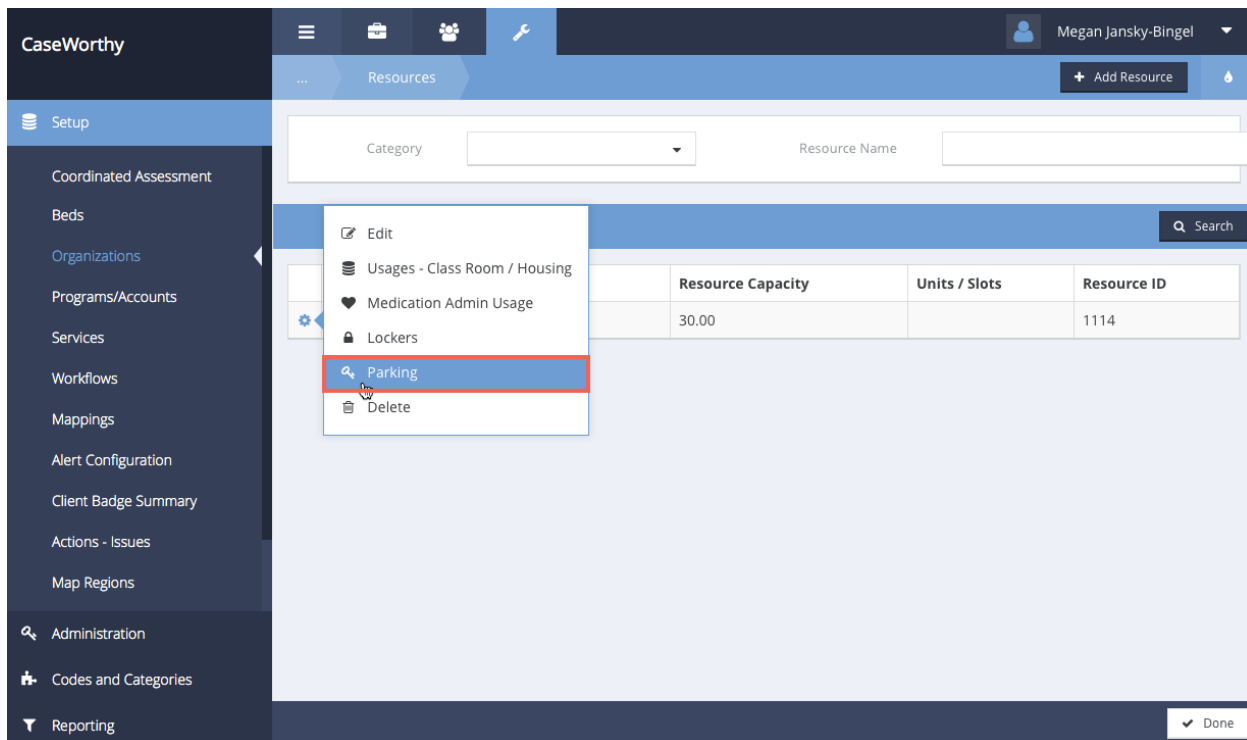
Save

Cancel



Parking

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

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



The screenshot displays the CaseWorthy System Administrator interface. The left sidebar contains a menu with categories like Setup, Organizations, Services, Workflows, Mappings, Alert Configuration, Client Badge Summary, Actions - Issues, Map Regions, Administration, Codes and Categories, and Reporting. The main area shows a table with columns for Resource Capacity, Units / Slots, and Resource ID. A context menu is open over the table, showing options: Edit, Usages - Class Room / Housing, Medication Admin Usage, Lockers, Parking (highlighted with a red box), and Delete. The top right of the interface shows the user name Megan Jansky-Bingel and a search bar.

Click the  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  button on the bottom right side of the form.

CaseWorthy

Megan Jansky-Bingel

Parking Spaces

+ Add Row


Parking Space Name *	Parking Space Status	Handicap	Type
Parking Space 1	Available	<input checked="" type="checkbox"/>	Parking Spaces

Save Cancel

Edit Resource Slot Category Type

(Administration>Setup>Organizations)


Find Organizations			Manage Categories	New Organization	Add New w/ Sharing
Total Rows: 29					
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.

			Manage Categories	New Organization	Add New w/ Sharing	
...	Edit					
...	Data Sharing					
...	Providers					
...	Users					
...	Teams					
...	Approval Process					
Chrysalis Center Inc.						
Community Health Resources						
Eric Organization						
Head Start						
Jane Test						

The Providers form displays.

Providers																																																																								
Provider Name		Provider Category		Choose Options...																																																																				
<div>Total Rows: 190</div> <table border="1"> <thead> <tr> <th>Provider</th> <th>Provider Type</th> <th>Address, City, State & Zip</th> <th>Latitude</th> <th>Longitude</th> <th>SubProvider Count</th> <th>Parent EntityID</th> <th>Provider ID</th> <th>Org ID</th> </tr> </thead> <tbody> <tr> <td>Adrian's Bistro</td> <td>Employer</td> <td></td> <td>0</td> <td>0</td> <td>0</td> <td></td> <td>9711</td> <td>12</td> </tr> <tr> <td>Adrian's Bistro</td> <td>Employer</td> <td></td> <td>0</td> <td>0</td> <td>0</td> <td></td> <td>9712</td> <td>12</td> </tr> <tr> <td>Appalachian Regional Coalition on Homelessness</td> <td>Customer</td> <td>56 South 800 West Salt Lake City, UT, 84104</td> <td>40.7678317</td> <td>-111.9140967</td> <td>0</td> <td></td> <td>128</td> <td>12</td> </tr> <tr> <td>Apple Computers - Real</td> <td>_ Not Assigned</td> <td>123 S. Main St. NEW YORK, NY, 10008</td> <td>0</td> <td>0</td> <td>0</td> <td></td> <td>4029</td> <td>12</td> </tr> <tr> <td>Auto Zone</td> <td>Employer</td> <td></td> <td>0</td> <td>0</td> <td>0</td> <td></td> <td>4144</td> <td>12</td> </tr> <tr> <td>Banner Health</td> <td>Provider</td> <td>1441 North 12th Street Phoenix, AZ, 85006</td> <td>33.46</td> <td>-112.05</td> <td>0</td> <td></td> <td>3606</td> <td>12</td> </tr> </tbody> </table>										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
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.

			Manage Categories	Add New	
...	Edit				
...	Resources				
...	Program				
...	Services				
...	Scan Card Services				
...	Provider Release				
...	Provider Contacts				
...	Property				
...	Contracts				

The Resources form displays.

...

Resources

+ Add Resource


Category

Resource Name

Q 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

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.

Resources

+ Add Resource

Category

Housing Emergency

Resource Name

Search

	Resource Name	Units / Slots	Capacity	Resource ID
<div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div>+</div><div></div></div>				

The Resource Usage form displays.

...

Resource Usage

Manage Categories


+ Add Usage

Usage Name

Total Rows: 6

Search

	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	Isample 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	Isample prog (HIV)	1/7/2014 - 12/30/2015	Enter Enrollment Optional	30	2
	Dale's House	Bed Night	Isample 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.

Resource Usage

Usage Name

Total

☒ Edit
☒ Room Designer
☒ Slot Inventory
☒ Short Edit
☒ Wait List
☒ Seasonal Beds
☒ Housing Setup
☒ Slot History
☒ Edit Multi-Service Quantity

Attendance Service	Program Name	Start - End Date	Enrollment Type	Capacity	Enrolled Today
Emergency Shelter Bed Night	EmergencyShelter(PIT)	1/1/2012 - 8/1/2014	Required/Auto Enrollment	50	3
Bed Night	Isample prog (HIV)	1/1/2012 - Present	Required/Auto Enrollment	50	7
Daily Shelter Bed Night	SOH ONG	1/1/2012 - Present	Required/Auto Enrollment	50	34
Bed Night	2 YAGA	8/9/2013 - Present	Enter Enrollment Optional	50	2
Bed Night	Isample prog (HIV)	1/7/2014 - 12/30/2015	Enter Enrollment Optional	30	2
Bed Night	Isample prog (HIV)	7/23/2014 - Present	Required/Auto Enrollment	17	10

The Resource Slots form displays.

Resource Slots

Usage Randomizer Type

Total Rows: 49

Bed / Slot Description *	Slot Type *	Start Date	End Date	Category	CA Bed	Target Population	Status *	Availability
<input checked="" type="checkbox"/> 1	Slot	8/4/2014	Present		True	Chronic Homeless	Available	Normal
<input checked="" type="checkbox"/> 10	Slot	8/4/2014	Present		True	Chronic Homeless	Available	Normal
<input checked="" type="checkbox"/> 11	Slot	8/4/2014	Present		True	Chronic Homeless	Available	OverFlow
<input checked="" type="checkbox"/> 12	Slot	8/4/2014	Present		True	Chronic Homeless	Available	Seasonal
<input checked="" type="checkbox"/> 14	Slot						Available	
<input checked="" type="checkbox"/> 15	Slot	10/28/2014	Present		True		Available	OverFlow
<input checked="" type="checkbox"/> 16	Slot	7/30/2014	Present		True	Senior	Available	OverFlow

Click **Manage Categories**. The Category Type form displays.

Category Type

+ Add Row


Description	Type ID
<input checked="" type="checkbox"/> HMIS Participating Bed	2
<input checked="" type="checkbox"/> Electrical Outlet Bed	3
<input checked="" type="checkbox"/> Handicap Accessible Bed	4

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)


Find Organizations			Manage Categories	New Organization	Add New w/ Sharing	
Total Rows: 29						
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.

Find Organizations			Manage Categories	New Organization	Add New w/ Sharing	
Total Rows: 29						
...	Edit					
	Data Sharing					
	Providers					
	Users					
	Teams					
	Approval Process					
Chrysalis Center Inc.	Users	158	12	2487	3728	3574
Community Health Resources	Users	0	2	3417	3418	4174
Eric Organization	Users	1	3	1528	4173	
Head Start	Users	3	1			
Jane Test	Users	1				

The Providers form displays.

Providers			Manage Categories	Add New				
<div> <div>Provider Name</div> <div>Provider Category</div> <div>Choose Options...</div> </div>								
Total Rows: 190								
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.


Providers				Manage Categories		Add New			
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
Brazos Valley Community Action Group	Customer	123 South Main Street SALT LAKE CITY, UT, 84107		0	0	0		120	12
Caitlin's Cupboard	_ Not Assigned			0	0	0		2569	12
Camille's Congregate Dining	_ Not Assigned			0	0	0		2564	12
✓ Edit	_ Not Assigned	1258 Highway 7 Schenectady, NY, 12306		42.78	-73.96	0		4096	12
Resources	Customer			0	0	0		4135	12
✓ Program	Employer	1234 RALEIGH, NC, 27605		0	0	0		4443	12
Services	Employer	1400 West North Temple Salt Lake City, UT, 84116		40.77	-111.93	0		4122	12
Scan Card Services	Employer	740 East 3900 South Salt Lake City, UT, 84107		40.68	-111.87	6		14	12
Provider Release	Front Desk	740 East 3900 South Salt Lake City, UT, 84107		40.68	-111.87	6		14	12
Provider Contacts	Landlord	740 East 3900 South Salt Lake City, UT, 84107		40.68	-111.87	6		14	12
Property	Provider	740 East 3900 South Salt Lake City, UT, 84107		40.68	-111.87	6		14	12
Contracts	Location	740 East 3900 South Salt Lake City, UT, 84107		40.68	-111.87	6		14	12

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

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.

Category	Resource Name	Units / Slots	Capacity	Resource ID
Event - In / Out	In and Out Class		50	1110

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

The screenshot shows the 'Resources' page with a search bar and a table. A red box highlights the 'Usage - Event In / Out' button in the top left corner of the table.

Resource Name	Units / Slots	Capacity	Resource ID
In and Out Class		50	1110

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

The screenshot shows the 'Resource Usage Event' form with a search bar and a table. A red box highlights the '+ Add Usage' button in the top right corner of the form.

Usage Name	Start Date	End Date	Enrolled Today
Toddlers - Ages 3 to 4	10/31/2014	Present	1
Kindergarten - Ages 5 to 6	10/31/2014	Present	4
Juniors - Ages 8 to 10	10/31/2014	Present	5
House of Fun - Ages 8 to 14	10/31/2014	Present	4
All Children - Ages 1 to 17	10/31/2014	Present	12

The Add Resource Usage Event form displays.

The screenshot shows the 'Add Resource Usage Event' form with various fields for event details, client accessibility, and recurrence.

Event Name:

Categories:

Start Date:

End Date:

Attendance Service:

Allowable Clients and Accessibility

Allow Males (Age 18+): ☒

Allow Females (Age 18+): ☒

Allow Children: ☒

Handicap Accessible: ☐

Allow Children Age:

Start Age:

End Age:

Recurrence: ☒ Daily ☐ Weekly ☐ BiWeekly ☐ Monthly ☐ Semi Monthly ☐ Annually

Day	# Slots	Slot Duration	Slot Start Time	Max Units In Slot	Slot Times Modified	Edit Slots
Everyday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

Recurrence Start/End times must be in military time i.e. 12 midnight is 00:00, 1 pm is 13:00. Single-digit times must have a leading zero, i.e. 9 am is 09:00.


Save Cancel

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.

The screenshot shows the 'Providers' management interface. A context menu is open over a table of providers, with the 'Program' option highlighted. The table has columns: Address, City, State & Zip, Phone, Latitude, Longitude, SubProvider Count, and Parent EntityID. A 'Done' button is at the bottom right.

Address, City, State & Zip	Phone	Latitude	Longitude	SubProvider Count	Parent EntityID
56 South 800 West Salt Lake City, UT, 84104		40.7678317	-111.9140967	0	
123 S. Main St. NEW YORK, NY, 10008		0	0	0	
		0	0	0	
1441 North 12th Street	345-345-3453	33.46	-112.05	0	

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.

The screenshot shows the 'Provider Programs' management interface. It displays a list of programs with checkboxes for selection and date pickers for 'Begin Date' and 'End Date'. A 'Save' button is at the bottom right.


Program	Begin Date	End Date
<input checked="" type="checkbox"/> Isample prog (HIV)		
<input checked="" type="checkbox"/> _CEAP / Utility Assistance		
<input checked="" type="checkbox"/> _Employment with Substance Abuse	11/17/2014	12/31/9999
Program Detail		
<input checked="" type="checkbox"/> 09 Head Start		
<input checked="" type="checkbox"/> 1 English for Employment	11/17/2014	12/31/9999
Program Detail: English for Employment program include a wide variety of services.....		
<input checked="" type="checkbox"/> 12 Permanent Housing for Homeless Disabled		
<input checked="" type="checkbox"/> 13 Safe Haven		
<input checked="" type="checkbox"/> 15 Supportive Services Only		
<input checked="" type="checkbox"/> 16 HMIS (ES)		
<input checked="" type="checkbox"/> 2 YAGA		

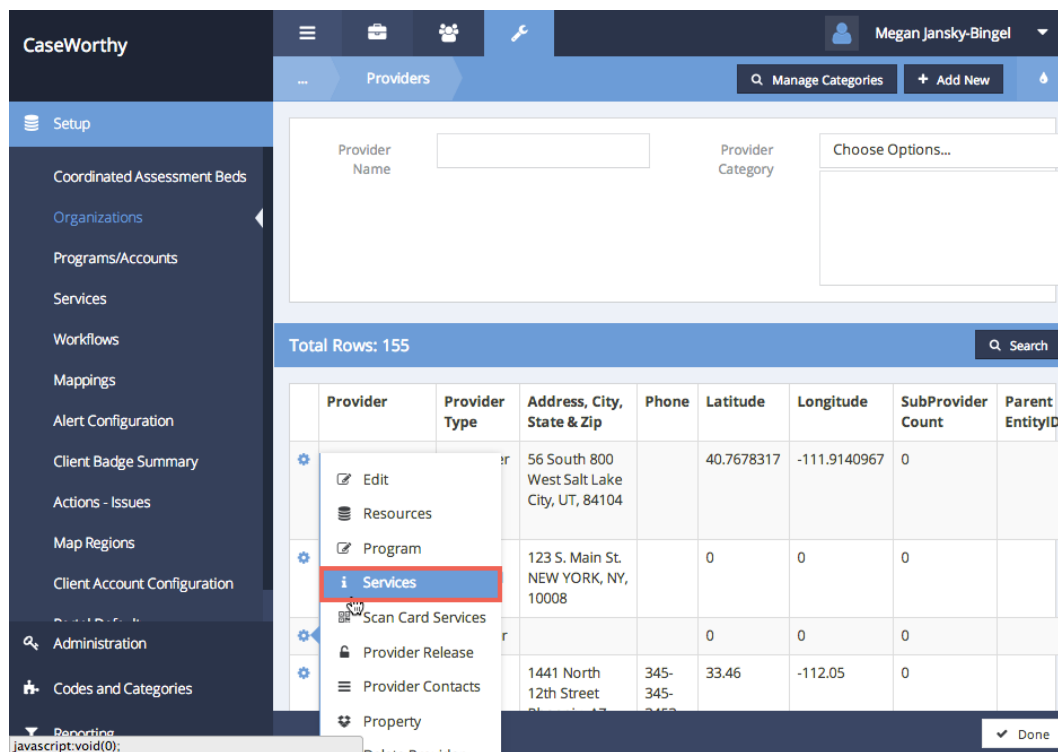
Linking Referral Services to Providers





(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”.



Provider	Provider Type	Address, City, State & Zip	Phone	Latitude	Longitude	SubProvider Count	Parent EntityID
		56 South 800 West Salt Lake City, UT, 84104		40.7678317	-111.9140967	0	
		123 S. Main St. NEW YORK, NY, 10008		0	0	0	
				0	0	0	
		1441 North 12th Street	345-345-3453	33.46	-112.05	0	

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

Category

Search


	Service Type ID	Referral Service Description	Allow Service Posting	Allow Referral	Approval Process	Post Service *
<input checked="" type="checkbox"/>	161	AA Meeting	<input type="checkbox"/>	<input type="checkbox"/>	2 Step App	
<input checked="" type="checkbox"/>	180	ADC	No	No	--Nothing--	
<input checked="" type="checkbox"/>	162	Adult Counseling Service	No	No	2 Step Approval	
<input checked="" type="checkbox"/>	268	AIDS Pharmaceutical Assistance	No	No	FM double approval	
<input checked="" type="checkbox"/>	114	Alcohol Counseling	No	No	Gift Cards - Approval / Reconciliation Processes	
<input checked="" type="checkbox"/>	116	Alcohol or Drug Abuse Services	No	No	Gift Cards - Transfer Between Case Managers	
<input checked="" type="checkbox"/>	119	Anger Management	<input type="checkbox"/>	<input type="checkbox"/>	Incentive Approval Process	
<input checked="" type="checkbox"/>	181	Assessment Fee for Adults	No	No	Single App	

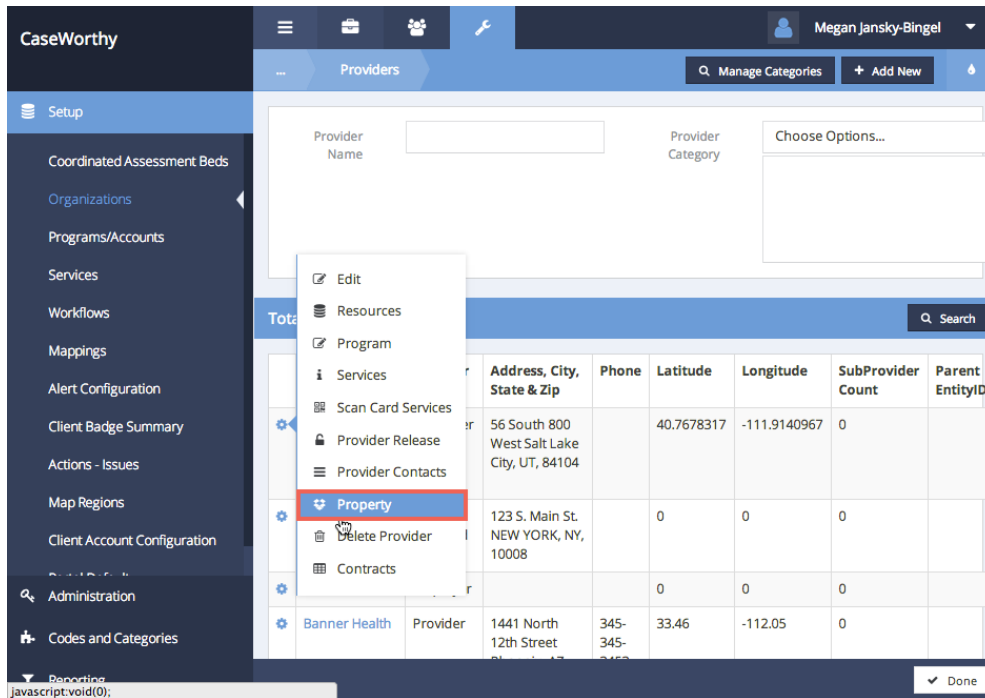
Save Cancel

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 screenshot shows the CaseWorthy interface. On the left is a navigation menu with sections like Setup, Administration, and Reporting. The 'Providers' section is active. The main area displays a table of providers. A context menu is open for the provider 'Banner Health', with the 'Property' option highlighted in red. The table has columns for Address, City, State & Zip, Phone, Latitude, Longitude, SubProvider Count, and Parent EntityID.

Address, City, State & Zip	Phone	Latitude	Longitude	SubProvider Count	Parent EntityID
56 South 800 West Salt Lake City, UT, 84104		40.7678317	-111.9140967	0	
123 S. Main St. NEW YORK, NY, 10008		0	0	0	
1441 North 12th Street	345-345-3453	33.46	-112.05	0	

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

The screenshot displays the CaseWorthy application interface. On the left is a dark sidebar with a menu containing items such as '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', and 'Reporting'. The main content area is titled 'Landlord Property Summary' and features a table with the following columns: 'Property Name', 'Address, City, & State', 'Avail. Begin / End Dates', 'Bedrooms', 'Total Sq. Feet', and 'Rent Amount'. An 'Add New' button is located in the top right corner of the table area. At the bottom right of the main area is a 'Done' button. The user's name, 'Megan Jansky-Bingel', is visible in the top right corner of the header.

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

...

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

State

Longitude

County

ZipCode ★

Neighborhood

xx?DatabaseID=1&#

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.

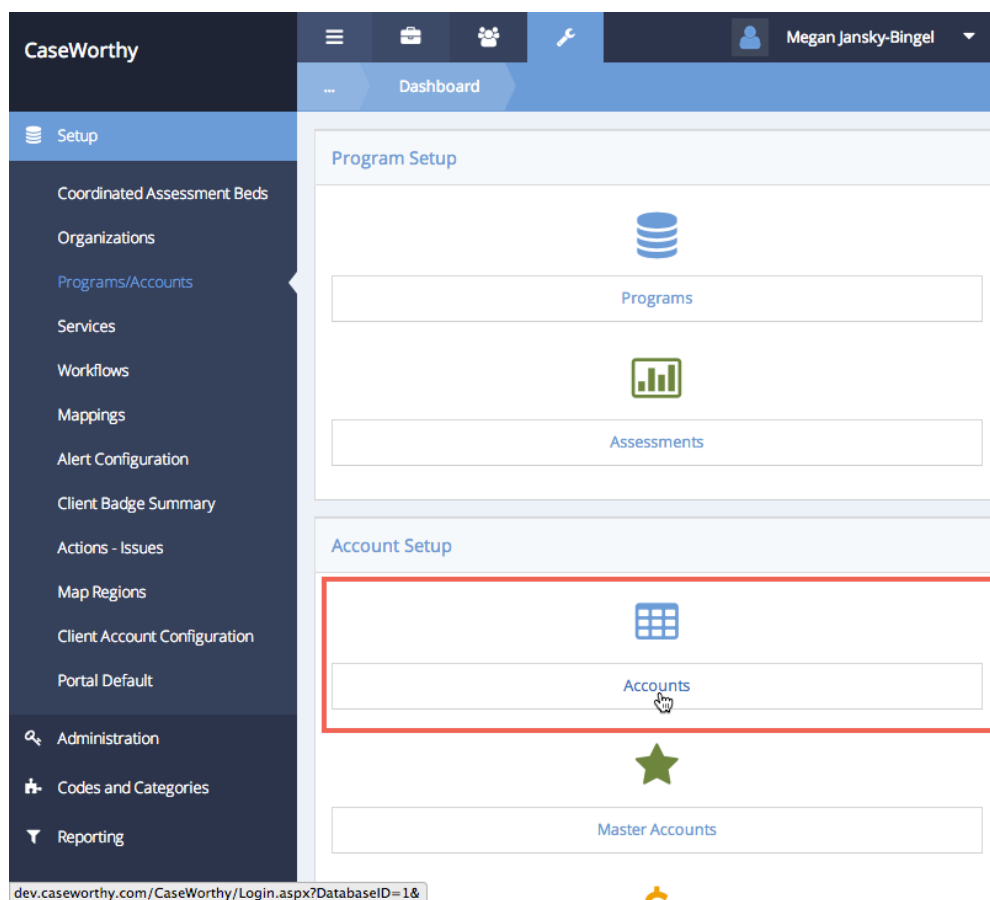
Accounts

(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.

Status	Account	Fiscal Year Start - End Dates	Funder Name	Disbursement Method	Fiscal Year Totals	Programs Linked	System ID
		10/13/2013 - Present			\$0.00	0	86
	ISample Acc	8/16/2012 - Present	United Way	Letter of Direction	\$0.00	2	65
	_Gas Account	9/16/2010 - Present	Reliant Energy	Letter of Direction	\$0.00	7	7
	_LIHEAP - 2013	11/21/2013 - Present	United Way	Check	\$0.00	5	88
	_LIHEAP - 2014	1/28/2014 - Present	United Way	Check	\$0.00	2	90
Open	_LIHEAP (2014 - Also)	6/18/2012 - Present	United Way	Check	\$450,000.00	3	64
	_Utility - Multiple Vendor, LOD	3/1/2013 - Present		Letter of Direction	\$0.00	1	72
	_Utility Account	1/1/2010 - Present		Letter of Direction	\$0.00	5	6

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

Account Name *

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.

Account Usage Restrictions

Obligation Approval Process	<input type="text"/>	Only Allow Withdrawals From Obligations	<input type="checkbox"/>
Default Provider	<input type="text"/> <input type="button" value="Q"/> <input type="button" value="X"/>	Require This Provider	<input type="checkbox"/>
Only Pay Vendor	<input type="text"/> <input type="button" value="Q"/> <input type="button" value="X"/>	Organizations	<input type="button" value="All"/> <input type="button" value="None"/> <input type="button" value="Choose Options..."/> <input type="text"/>

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


Funder Information

Funder Name	<input type="text"/>	Account Type	<input type="text"/>
Address 1	<input type="text"/>	Address 2	<input type="text"/>
Zip	<input type="text"/> <input type="button" value="Q"/>	State	<input type="text"/>
City	<input type="text"/>		

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

Bank Information

Disbursement Method *	<input type="text"/>	Consolidation Type *	<input type="text"/>
Approved Service to reduce Account Balance	<input type="checkbox"/>	Account Number *	<input type="text"/>
Bank Name *	<input type="text"/> <input type="button" value="Q"/>	Bank Address 2	<input type="text"/>
Bank Address *	<input type="text"/>	Bank State	<input type="text"/>
Bank Zip	<input type="text"/>		
Bank City	<input type="text"/>		

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”.

The screenshot shows the CaseWorthy application interface. The top navigation bar includes the CaseWorthy logo, a hamburger menu, icons for home, users, and settings, and a user profile for Megan Jansky-Bingel. Below this is a breadcrumb trail: Accounts with Fiscal Calendar. A secondary navigation bar contains 'Setup', '+ Add New', 'Account Transfers', and 'Configuration Rules'. A left sidebar lists various system components like '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', and 'Reporting'. The main content area displays a table of accounts with columns: Status, Account, Fiscal Year, Funder Name, Disbursement Method, Fiscal Year Totals, and Program Linked. A context menu is open over the first row, with 'Monthly Balance Summary' highlighted. Other menu items include Edit, 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, and Check / LOD Register. The table shows several rows of data, including entries for 'United Way' and 'Reliant Energy'.

Status	Account	Fiscal Year	Funder Name	Disbursement Method	Fiscal Year Totals	Program Linked
					\$0.00	0
			United Way	Letter of Direction	\$0.00	2
			Reliant Energy	Letter of Direction	\$0.00	7
			United Way	Check	\$0.00	5
			United Way	Check	\$0.00	2
			United Way	Check	\$450,000.00	3
				Letter of Direction	\$0.00	1
				Letter of Direction	\$0.00	5
	_Utility Multiple Payee Vendor, Consolidated Ck.	3/19/2013 - Present		Check	\$0.00	1
	_Utility, One Provider, Write Chekcs	3/1/2013 - Present		Check	\$0.00	1

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

CaseWorthy


Megan Jansky-Bingel

View Account Monthly Summary

+ New Transaction

	Month	Year	Account Name	Balance	Avail. Balance	Committed	Approved	Hold	Denied
⚙	1	2014	_LIHEAP - 2013	\$9,190.00	\$9,170.00	\$70.00	\$-100.00	\$70.00	\$80.00
⚙	11	2013	_LIHEAP - 2013	\$10,300.00	\$10,230.00	\$70.00	\$-50.00	\$70.00	\$80.00
⚙	12	2013	_LIHEAP - 2013	\$10,190.00	\$10,170.00	\$70.00	\$-100.00	\$70.00	\$80.00

Done

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

The screenshot shows the CaseWorthy user interface. On the left is a dark blue sidebar with a 'CaseWorthy' logo at the top. Below the logo is a 'Setup' section with a list of menu items: 'Coordinated Assessment Beds', 'Organizations', 'Programs/Accounts' (highlighted with a blue arrow), 'Services', 'Workflows', 'Mappings', 'Alert Configuration', 'Client Badge Summary', 'Actions - Issues', 'Map Regions', 'Client Account Configuration', and 'Portal Default'. Below this is an 'Administration' section with 'Codes and Categories' and 'Reporting'. The main content area has a top bar with 'Account Transaction' and a user profile 'Megan Jansky-Bingel'. Below the top bar is a light blue box with a lightbulb icon and the text: 'Record Deposits, related deposit adjustments and miscellaneous transaction adjustments. To reduce the amount, enter the amount as negative.' Inside this box are three fields: 'Transaction Date' with the value '11/18/2014' and a calendar icon, 'Transaction Type' with a dropdown menu showing 'Deposits (Additional Funds)', and 'Deposit Amount' with an empty text input field. At the bottom right of the main content area are two buttons: 'Save' (highlighted with a red box) and 'Cancel'.

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”.

The screenshot displays the CaseWorthy System Administrator interface. On the left is a dark blue sidebar with a menu including 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, and Reporting. The main area shows a table of account transactions with columns: Avail. Balance, Committed, Approved, and Hold. A dropdown menu is open over the table, listing options: View Monthly Detail (selected), View Committed From Accounts, View Approved From Accounts, View On Hold From Accounts, View Denied From Accounts, View Committed From Supporting Tables, View Approved From Supporting Tables, and View On Hold From Supporting Tables. The table contains 10 rows of data for various accounts and years.

				Avail. Balance	Committed	Approved	Hold
				\$15,041.00	\$65.78	\$305.22	\$0.00
				\$14,281.47	\$489.31	\$641.22	\$0.00
				\$14,043.06	\$727.72	\$641.22	\$120.20
5	2014	ISample Acc	\$15,412.00	\$14,043.06	\$616.62	\$752.32	\$120.20
6	2014	ISample Acc	\$15,467.55	\$14,098.61	\$616.62	\$696.77	\$197.97
7	2014	ISample Acc	\$15,467.55	\$13,913.88	\$801.35	\$696.77	\$197.97
8	2014	ISample Acc	\$15,467.55	\$13,912.88	\$802.35	\$696.77	\$197.97
10	2014	ISample Acc	\$15,467.55	\$13,897.73	\$817.50	\$696.77	\$197.97
2	2013	ISample Acc	\$1,300.00	\$1,296.00	\$4.00	\$0.00	\$0.00
3	2013	ISample Acc	\$6,720.00	\$6,716.00	\$4.00	\$0.00	\$0.00
4	2013	ISample	\$16,720.00	\$16,691.00	\$29.00	\$0.00	\$0.00

At the bottom of the interface, there is a status bar with the text "javascript:void(0);", a "Done" button, and a "Search" button.

In the monthly account transactions field, click any of the column headers to reorder transactions by the selected criteria. Click the **Search** button to view transaction records that meet the search criteria.

CaseWorthy


Monthly Account Transactions

Total Rows: 2

Q Search

Date	List Type Name	Client / Payee	List Type	Trans. Type	Status	Month / Year	Amount
1/15/2014	Service Request (Pending Approval)	Shine, Charlie	5	2	3	1 / 2014	\$86.00
1/29/2014	Service Request (Pending Approval)	Test, Jane512	5	2	3	1 / 2014	\$1.00

Done

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".

The screenshot displays the CaseWorthy System Administrator interface. The top navigation bar includes the CaseWorthy logo, a hamburger menu, and user information for Megan Jansky-Bingel. The main header shows the current page is 'Accounts with Fiscal Calendar', with buttons for '+ Add New', 'Account Transfers', and 'Configuration Rules'. A sidebar on the left lists various setup and administration categories. The main content area features a table of accounts with a context menu open over one of the rows. The menu options include 'Edit', 'Monthly Balance Summary', 'Generate Check or LOD' (highlighted), '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', and 'Check / LOD Register'. The table columns are: Vendor, Funder Name, Disbursement Method, Fiscal Year Totals, Programs Linked, and System ID. The bottom of the interface shows a 'Done' button and a small code snippet 'javascript:void(0);'.

CaseWorthy

Accounts with Fiscal Calendar + Add New Account Transfers Configuration Rules

Status

Total Rows: 113 Search

Generate Check or LOD

Vendor	Funder Name	Disbursement Method	Fiscal Year Totals	Programs Linked	System ID
13			\$0.00	0	86
2 -	United Way	Letter of Direction	\$0.00	2	65
0 -	Reliant Energy	Letter of Direction	\$0.00	7	7
13	United Way	Check	\$0.00	5	88
4 -	United Way	Check	\$0.00	2	90
2 -	United Way	Check	\$450,000.00	3	64
		Letter of Direction	\$0.00	1	72
		Letter of Direction	\$0.00	5	6

Vendor, LOD Present

_Utility Account 1/1/2010 - Present

Done

javascript:void(0);

CaseWorthy

...

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

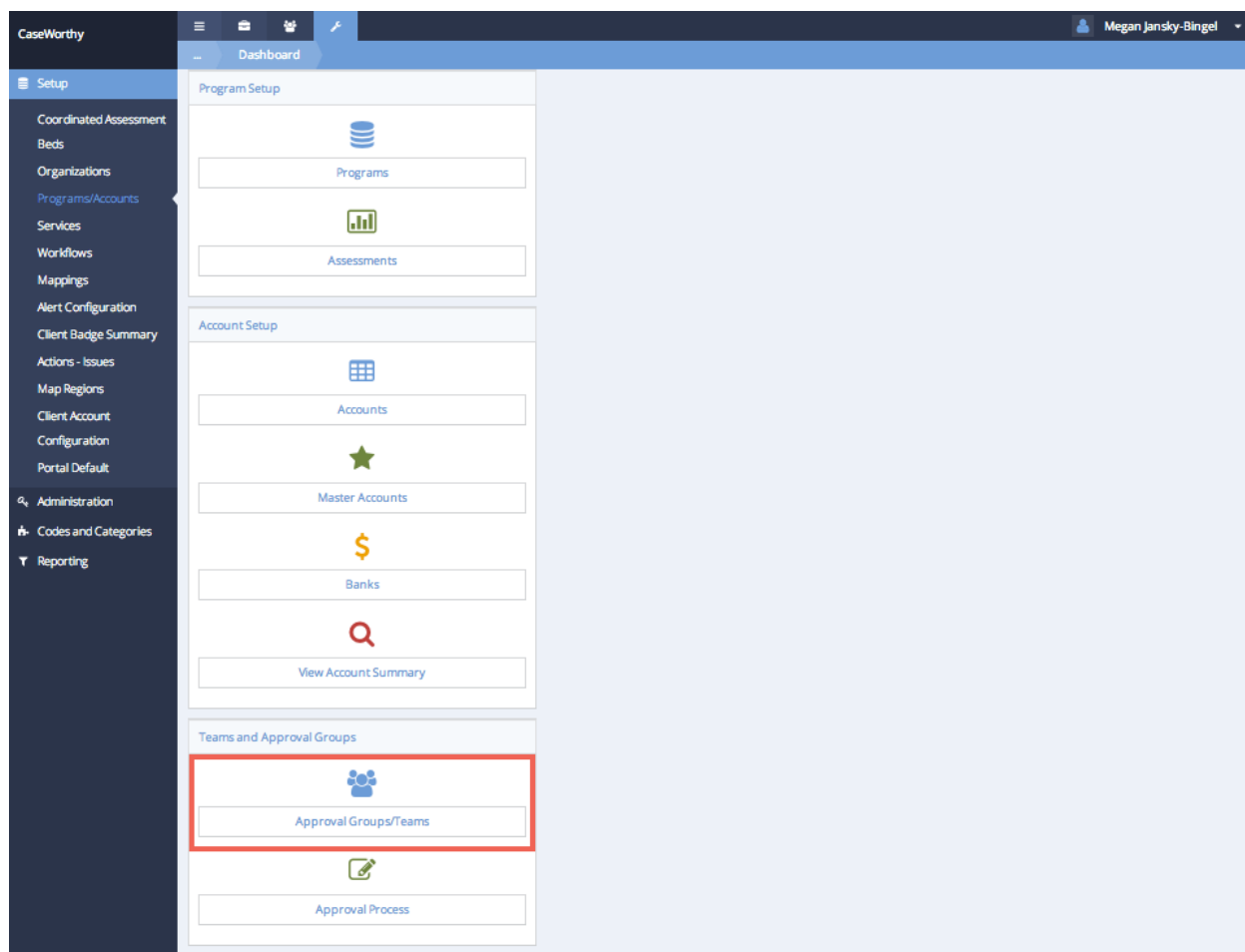
Cancel

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.

CaseWorthy

Megan Jansky-Bingel

...

Team/Approval Groups

+ 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: 45

	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

Done

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.

CaseWorthy

... Edit Approval Group

Team Type * ☒ Can Modify Account?

Team * Name

Enter start and end dates for the team.


Begin Date End Date

Organizations that have access to Approval Group/Team

Organizations Choose Options...

Cam Test
CaseWorthy
Catholic Charities
CCUSA External Providers

Save Cancel

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”.

CaseWorthy

Team/Approval Groups

+ Add new

Megan Jansky-Bingel

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: 45

	Team Name	Begin - End Dates	Members	Team Type	Modify Accounts	System ID
⚙		11/15/2011 - Present	10	Approvers	No	71
⚙		11/15/2011 - Present	8	Approvers	No	72
⚙		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

Done

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

The screenshot shows the CaseWorthy System Administrator interface. The top navigation bar includes the CaseWorthy logo, a hamburger menu, and icons for a briefcase, a group of people, and a wrench. The user's name, Megan Jansky-Bingel, is displayed in the top right. The main header area shows the current page, 'Approval Group Members', with a red box highlighting the '+ Add New' button. The left sidebar contains a list of navigation options: 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, and Reporting. The main content area displays a table of team members with the following columns: Team Member Name *, Full Name, Contact Phone, Is Leader, and System ID. The table contains 8 rows of data, each with a checkbox in the first column. The bottom right corner of the interface has 'Save' and 'Cancel' buttons.

	Team Member Name *	Full Name	Contact Phone	Is Leader	System ID
<input checked="" type="checkbox"/>	maurer	maurer, alex		No	2040
<input checked="" type="checkbox"/>	monti	monti, meg		No	1489
<input checked="" type="checkbox"/>	Tjoe	Tjoe, Jane		No	1327
<input checked="" type="checkbox"/>	Bingel	Bingel, Brian	801-898-1214	Yes	1305
<input checked="" type="checkbox"/>	Wilson	Wilson, Nina		No	1819
<input checked="" type="checkbox"/>	Seay	Seay, D.R.		No	4361
<input checked="" type="checkbox"/>	Gummadapu	Gummadapu, Paparao		No	2458
<input checked="" type="checkbox"/>	Richardson	Richardson, Jennifer		No	2371

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

CaseWorthy

Approval Group Members

+ Add New


Total Rows: 8

	Team Member Name *	Full Name	Contact Phone	Is Leader	System ID	
<input checked="" type="checkbox"/>	<input type="text"/>		<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="button" value="x"/>
<input checked="" type="checkbox"/>	maurer	maurer, alex		No	2040	
<input checked="" type="checkbox"/>	monti	monti, meg		No	1489	
<input checked="" type="checkbox"/>	Tjoe	Tjoe, Jane		No	1327	
<input checked="" type="checkbox"/>	Bingel	Bingel, Brian	801-898-1214	Yes	1305	
<input checked="" type="checkbox"/>	Wilson	Wilson, Nina		No	1819	
<input checked="" type="checkbox"/>	Seay	Seay, D.R.		No	4361	
<input checked="" type="checkbox"/>	Gummadapu	Gummadapu, Paparao		No	2458	
<input checked="" type="checkbox"/>	Richardson	Richardson, Jennifer		No	2371	

Save Cancel

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

Select Users Lookup			
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	
<input checked="" type="checkbox"/>	<div>Chang, Dave</div> <div>Q</div>		<div> <div></div> <div></div> <div></div> </div>	<input checked="" type="checkbox"/>	4422	<input type="text" value="x"/>
<input checked="" type="checkbox"/>	maurer	maurer, alex		No	2040	
<input checked="" type="checkbox"/>	monti	monti, meg		No	1489	
<input checked="" type="checkbox"/>	Tjoe	Tjoe, Jane		No	1327	
<input checked="" type="checkbox"/>	Bingel	Bingel, Brian	801-898-1214	Yes	1305	
<input checked="" type="checkbox"/>	Wilson	Wilson, Nina		No	1819	
<input checked="" type="checkbox"/>	Seay	Seay, D.R.		No	4361	
<input checked="" type="checkbox"/>	Gummadapu	Gummadapu, Paparao		No	2458	
<input checked="" type="checkbox"/>	Richardson	Richardson, Jennifer		No	2371	

Save

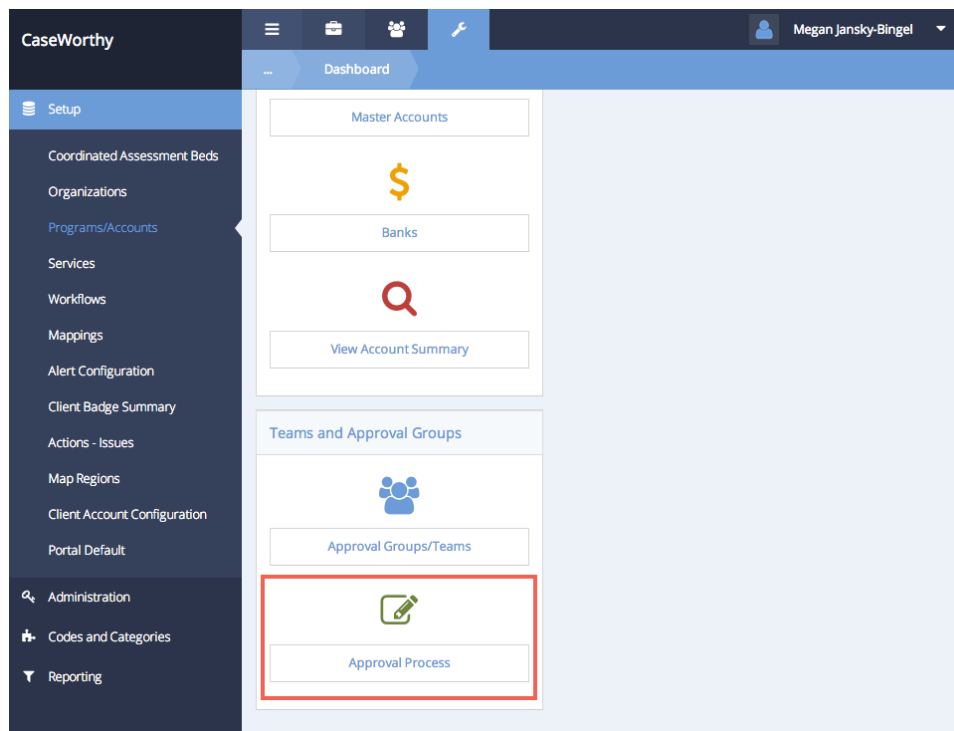
Cancel

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 **+ Add New** button.

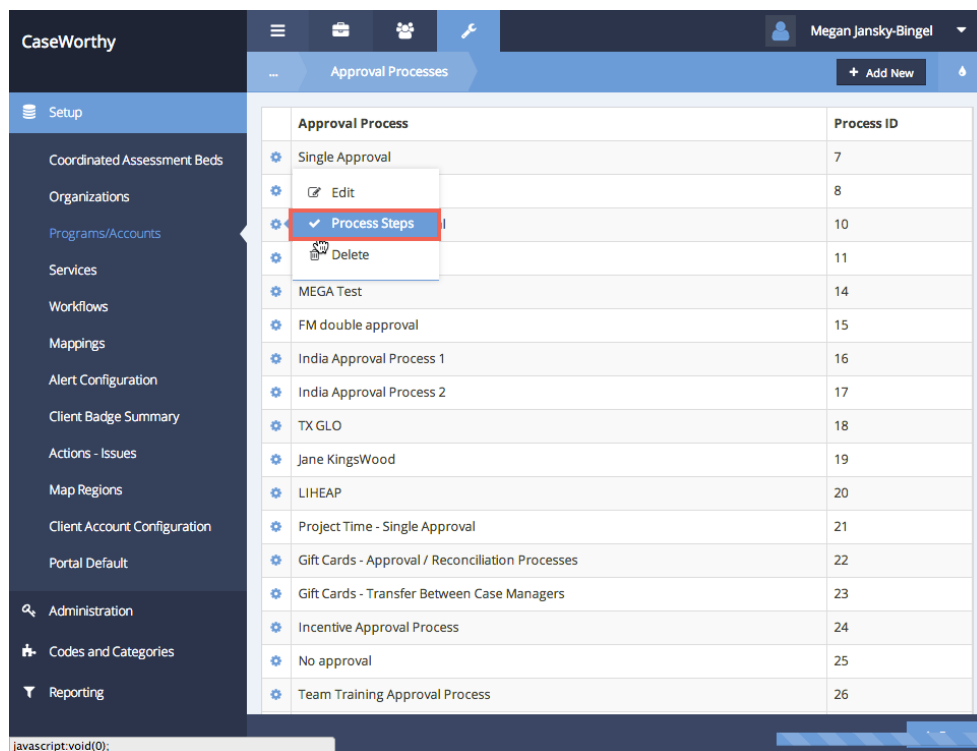
Approval Process	Process ID
Single Approval	7
Multi Review	8
Utility Assistance General	10
JaneProcess	11
MEGA Test	14
FM double approval	15
India Approval Process 1	16
India Approval Process 2	17
TX GLO	18
Jane KingsWood	19
LIHEAP	20
Project Time - Single Approval	21
Gift Cards - Approval / Reconciliation Processes	22
Gift Cards - Transfer Between Case Managers	23
Incentive Approval Process	24
No approval	25
Team Training Approval Process	26

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

Process Name *

Save Cancel

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



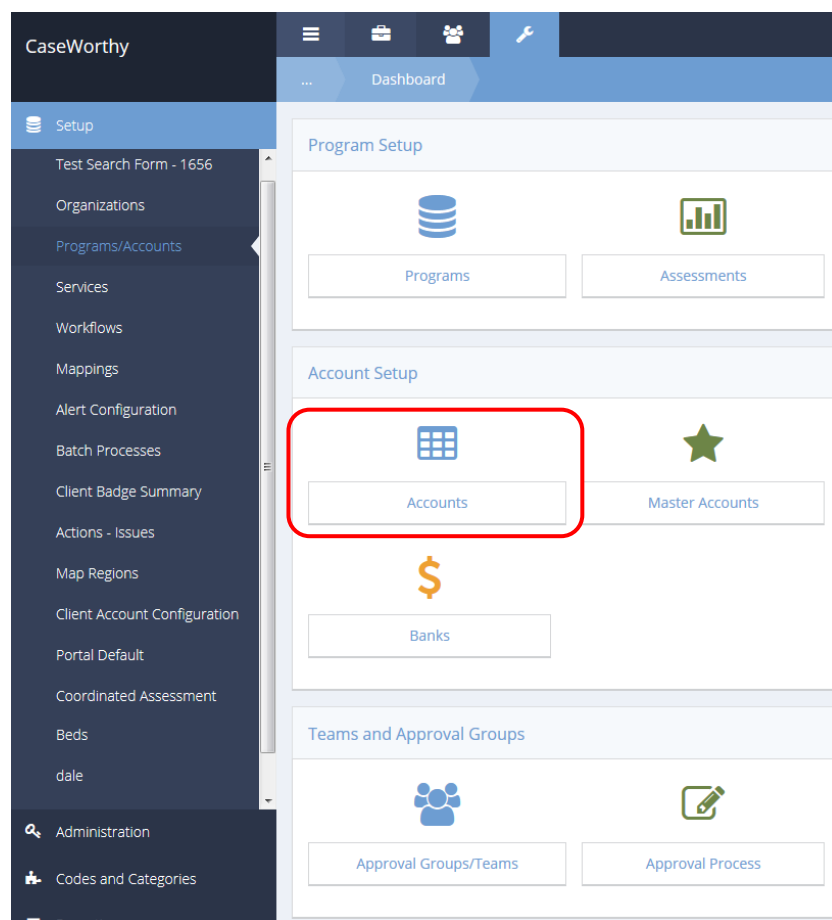
On the Process Steps set up form, click **+ Add Row** to display a row. Enter a name for the step as well as the sort order. Use the drop-down list to link the Approval Group/Team to be linked to the process and the number of approvals that are required to move forward/complete the approval process. 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.

The screenshot shows the CaseWorthy System Administrator interface. The top navigation bar includes the CaseWorthy logo, a user profile dropdown for Megan Jansky-Bingel, and a title bar for the 'Approval Obligation Steps' configuration page. The left sidebar contains a list of navigation items: 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, and Reporting. The main content area displays a table with the following columns: Approval Process Step, Sort Order, Approval Group, # of Required Approvals, Alert Type, and Allowable Days. A single row is visible with the following data: Single Approval, 1, Quality Assurance, 1, and 6 Days. The 'Add Row' button is highlighted in red. The 'Save' button is also highlighted in red.

Approval Process Step *	Sort Order *	Approval Group *	# of Required Approvals *	Alert Type	Allowable Days
<input checked="" type="checkbox"/> Single Approval	1	Quality Assurance	1		6 Days

View Account Monthly Summary

(Administration>Setup>Programs/Accounts>Accounts)



Click the Accounts icon.

The Accounts with Fiscal Calendar form displays.

...

Accounts with Fiscal Calendar

+ Add New

= Account Transfers

🔗 Service Req. Config. Rules

+ Service Auth. Config. Rules

🔍

Account

Status

Total Rows: 79

🔍 Search

	Status	Account	Fiscal Year Start - End Dates	Funder Name	Disbursement Method	Fiscal Year Totals	Programs Linked	Account ID
⚙			10/13/2013 - Present			\$0.00	0	86
⚙		ISample Acc	8/16/2012 - Present	United Way	Letter of Direction	\$0.00	2	65
⚙		_Gas Account	9/16/2010 - Present	Reliant Energy	Letter of Direction	\$0.00	8	7
⚙		_LIHEAP - 2013	11/21/2013 - Present	United Way	Check	\$0.00	5	88
⚙		_LIHEAP - 2014	1/28/2014 - Present	United Way	Check	\$0.00	3	90
⚙	Open	_LIHEAP (2014 - Also	6/18/2012 - Present	United Way	Check	\$450,000.00	4	64
⚙		Utility - Multiple Vendor LCO	3/1/2013 - Present		Letter of Direction	\$0.00	1	73

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

Accounts with Fiscal Calendar

Account: Status:

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

	Fiscal Year Start - End Dates	Funder Name	Disbursement Method	Fiscal Year Totals	Programs Linked	Account ID
	10/13/2013 - Present			\$0.00	0	86
	8/16/2012 - Present	United Way	Letter of Direction	\$0.00	2	65
	9/16/2010 - Present	Reliant Energy	Letter of Direction	\$0.00	8	7
	11/21/2013 - Present	United Way	Check	\$0.00	5	88
	1/28/2014 - Present	United Way	Check	\$0.00	3	90
	6/18/2012 - Present	United Way	Check	\$450,000.00	4	64
	3/1/2013 - Present		Letter of Direction	\$0.00	1	72
	1/1/2010 - Present		Letter of Direction	\$0.00	5	6
Consolidated Ck.	3/19/2013 - Present		Check	\$0.00	1	74
_Utility, One Provider, Write Cheks	3/1/2013 - Present		Check	\$0.00	1	73

The View Account Monthly Summary form displays.

View Account Monthly Summary


SR - Service Requests | SE - Service Eligibility Authorization

Total Rows: 35

Month/Year	Account Name	Cash Balance	Avail. Balance	SR Committed	SR Approved	SE Committed	SE Approved	SR Hold	SE Hold
1 / 2015	_Gas Account	\$224,312.00	\$226,477.00	\$1,240.00	\$-3,626.00	\$11.00	\$0.00	\$-805.00	\$0.00
1 / 2014	_Gas Account	\$225,857.00	\$226,689.00	\$1,365.00	\$-2,406.00	\$0.00	\$0.00	\$-805.00	\$0.00
2 / 2014	_Gas Account	\$225,857.00	\$226,638.00	\$1,416.00	\$-2,406.00	\$0.00	\$0.00	\$-805.00	\$0.00
3 / 2014	_Gas Account	\$225,857.00	\$226,528.00	\$1,366.00	\$-2,246.00	\$0.00	\$0.00	\$-805.00	\$0.00
4 / 2014	_Gas Account	\$225,857.00	\$226,555.00	\$1,336.00	\$-2,243.00	\$0.00	\$0.00	\$-805.00	\$0.00
5 / 2014	_Gas Account	\$225,857.00	\$226,555.00	\$1,230.00	\$-2,137.00	\$0.00	\$0.00	\$-805.00	\$0.00

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.

View Account Monthly Summary									
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	
		Account	\$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.

Provider Referral Approvals Process Item New

Service requests for approval.

Funding Source

Status *

Accepted/Approved


Client (Last Name, First Name)

Search


Results display below the search bar.

Total Rows: 369								
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.

View Account Monthly Summary									
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	
		Account	\$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	
7	2013	_Gas Account	\$226,067.80	\$229,037.74	\$117.26	\$-3,097.14	\$0.00	\$0.00	

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  button.

Provider Referral Approvals Process Item New

Service requests for approval.

Funding Source

Status *

Pending Approval


Client (Last Name, First Name)

Search

Results display below the search bar.


Total Rows: 381										
Client (Last Name, First Name)	Middle Name	Trans. Date	Bill Date	SSN	Service	Bill Account #	Payee	Funding Source	Amount	Hold Amount
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.

View Account Monthly Summary									
	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
⚙			Account	\$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
⚙	7	2013	_Gas Account	\$226,067.80	\$228,987.74	\$117.20	\$-3,037.14	\$0.00	\$0.00
⚙	9	2013	_Gas Account	\$225,927.80	\$228,847.74	\$117.20	\$-3,177.14	\$0.00	\$0.00

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

Service Requests - On Hold									
Service requests on hold that require attention. Either deny these requests to end the process or release the hold to allow the request to resume the approval process.									
Hold Date *	10/17/2014	to	12/16/2014	On Hold User		Account	_Gas Account	Service	
									

Results display below the search bar.

Hold Date	Provider	Client	On Hold User	Referral Status	Reason	Account	Service	Amount
4/3/2014	CaseWorthy	Jane, Jane213	JaneTJoe	Case Manager Hold - 0	On Hold	ISample Acc	AA Meeting	\$51.51
4/3/2014	CaseWorthy	Jane, Jane213	JaneTJoe	Case Manager Hold - 0	another on hold	ISample Acc	AA Meeting	\$52.52
4/3/2014	CaseWorthy	famint, man	JaneTJoe	Case Manager Hold - 0	REason onhold	ISample Acc	AA Meeting	\$16.17
4/7/2014	CaseWorthy	Test, Attorney	JaneTJoe	Case Manager Hold - 0	Services/Approved Amount doesn't match docs	TVC	AA Meeting	\$10.02

View Account Monthly Summary

(Administration>Setup>Programs/Accounts>Accounts)

System Mapping

(Administration>Setup>Mappings)

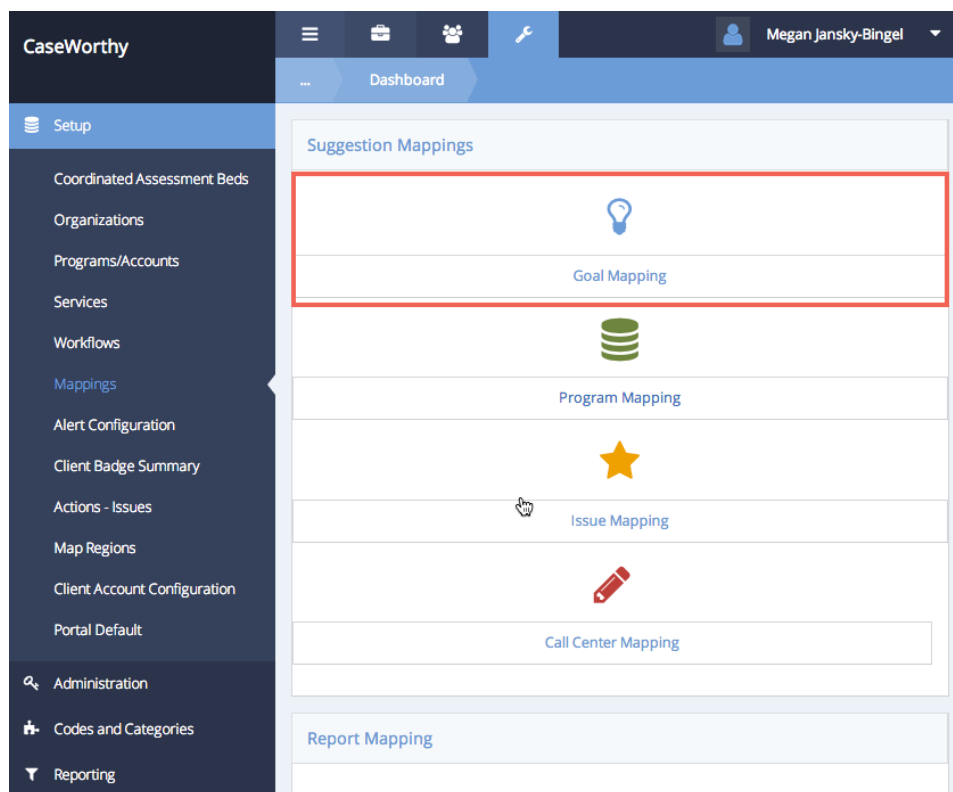
In CaseWorthy™, links can be made for various tasks, processes and/or reports. To set up the desired linkages, click on the “Mappings” link on the Set-Up menu in the Administration area.


Goal Mapping

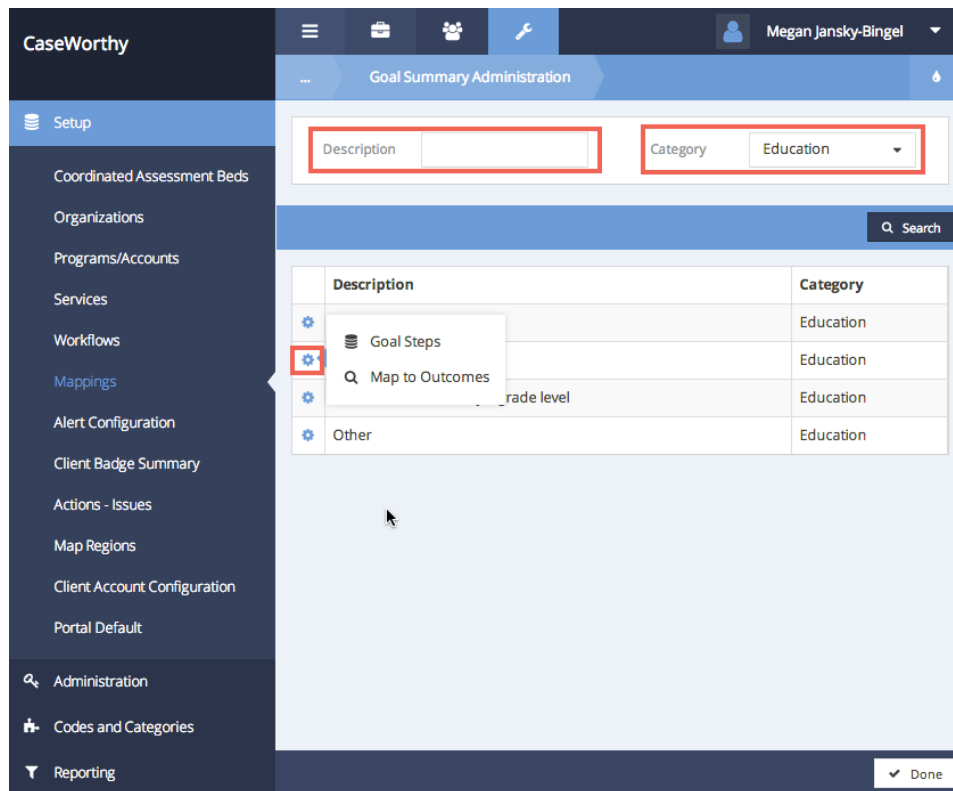
(Administration>Setup>Mappings>Goal Mapping)

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”.

CaseWorthy

Goal Summary Administration

Description Category Education

Search

Description	Category
<input checked="" type="checkbox"/> Goal Steps	Education
<input checked="" type="checkbox"/> Map to Outcomes	Education
<input checked="" type="checkbox"/> Map to Outcomes (grade level)	Education
<input checked="" type="checkbox"/> Other	Education

Done

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.

CaseWorthy

Megan Jansky-Bingel

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

Step Description

Total Rows: 53

Step Order *	Goal Step
<input checked="" type="checkbox"/> 10	Get High School Transcripts
<input checked="" type="checkbox"/> 5	Tuition Assistance
<input checked="" type="checkbox"/> 1	Arrange Tutor
<input checked="" type="checkbox"/> 0	Open Savings Account
<input checked="" type="checkbox"/> 0	Open Checking Account
<input checked="" type="checkbox"/> 0	Attend AA class
<input checked="" type="checkbox"/> 0	30 days clean
<input checked="" type="checkbox"/> 0	Write resume
<input checked="" type="checkbox"/> 0	Take cooking class
<input checked="" type="checkbox"/> 0	Learn recipes
<input checked="" type="checkbox"/> 0	Get Taxes
<input checked="" type="checkbox"/> 0	Learn multiplication tables through 12

Save Cancel

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.

The screenshot shows the 'Goal Summary Administration' page in CaseWorthy. The left sidebar contains a navigation menu with options: 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, and Reporting. The main content area has a header 'Goal Summary Administration' and a search bar. Below is a table with two columns: 'Description' and 'Category'. The table lists various outcomes, including '\$50 savings', 'Ability to follow rules and instructions.', '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', and 'Control and balance in various activities.'. A context menu is open over the table, showing options like 'Goal Steps' and 'Map to Outcomes', with 'Map to Outcomes' highlighted in red. A 'Done' button is visible at the bottom right of the table area.

Description	Category
\$50 savings	Financial
Ability to follow rules and instructions.	HS Health Status and Practices
Ability to follow rules and instructions. (Sharing)	HS Cooperation
Acquire Stable Housing	Education
Adequate, healthy food is available in the home	Legal
Awareness of jobs and how to perform them.	Housing
Children have safe, adequate sleeping arrangements	Family Support
Chip Benefits	HS Knowledge of Families and Communities
Comfort in talking and accepting rules from adults	Family Support
Control and balance in various activities.	Entitlements
	HS Social Relationships
	HS Gross Motor Skills

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.

The screenshot shows the CaseWorthy System Administrator interface. The left sidebar contains the following navigation links: 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, and Reporting. The main area is titled 'Goals - Orgs and Domains Mappings' and displays a table of domain mappings. The table has a 'Domain Name' column and a checkbox column. The 'Adult Education' row is highlighted with a red box. At the bottom right, there are 'Save' and 'Cancel' buttons, with the 'Save' button also highlighted by a red box.

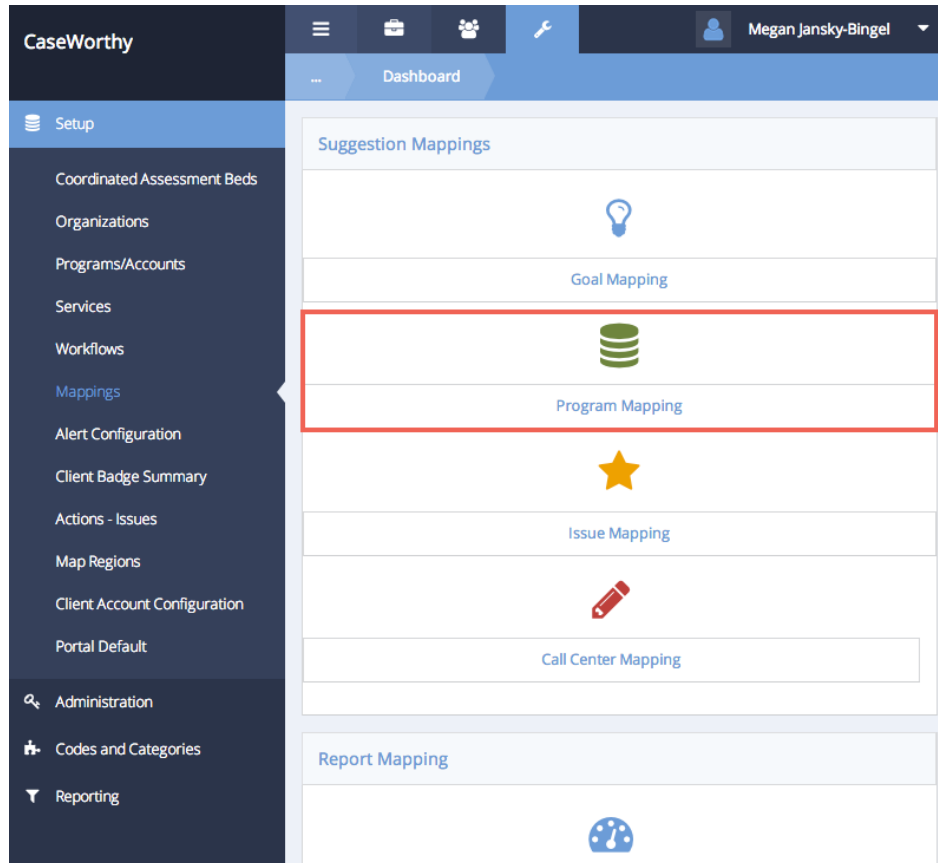
Domain Name	
<input checked="" type="checkbox"/> Adoption	
<input checked="" type="checkbox"/> Adult Education	
<input checked="" type="checkbox"/> Adult Education (Self Sufficiency Matrix)	
<input checked="" type="checkbox"/> Automobiles Sector	
<input checked="" type="checkbox"/> Child Care (Self Sufficiency Matrix)	
<input checked="" type="checkbox"/> Childcare	
<input checked="" type="checkbox"/> Children's Education	
<input checked="" type="checkbox"/> Children's Education (Self Sufficiency Matrix)	
<input checked="" type="checkbox"/> Citizenship	
<input checked="" type="checkbox"/> Community Involvement	
<input checked="" type="checkbox"/> Community Involvement (Self Sufficiency Matrix)	
<input checked="" type="checkbox"/> Credit History	
<input checked="" type="checkbox"/> Elderly Disabled (Self Sufficiency Matrix)	
<input checked="" type="checkbox"/> Employment	
<input checked="" type="checkbox"/> Employment (Self Sufficiency Matrix)	
<input checked="" type="checkbox"/> Employment Placement	
<input checked="" type="checkbox"/> Employment Retention	

Save Cancel

Program Mapping


(Administration>Setup>Mappings>Program Mapping)

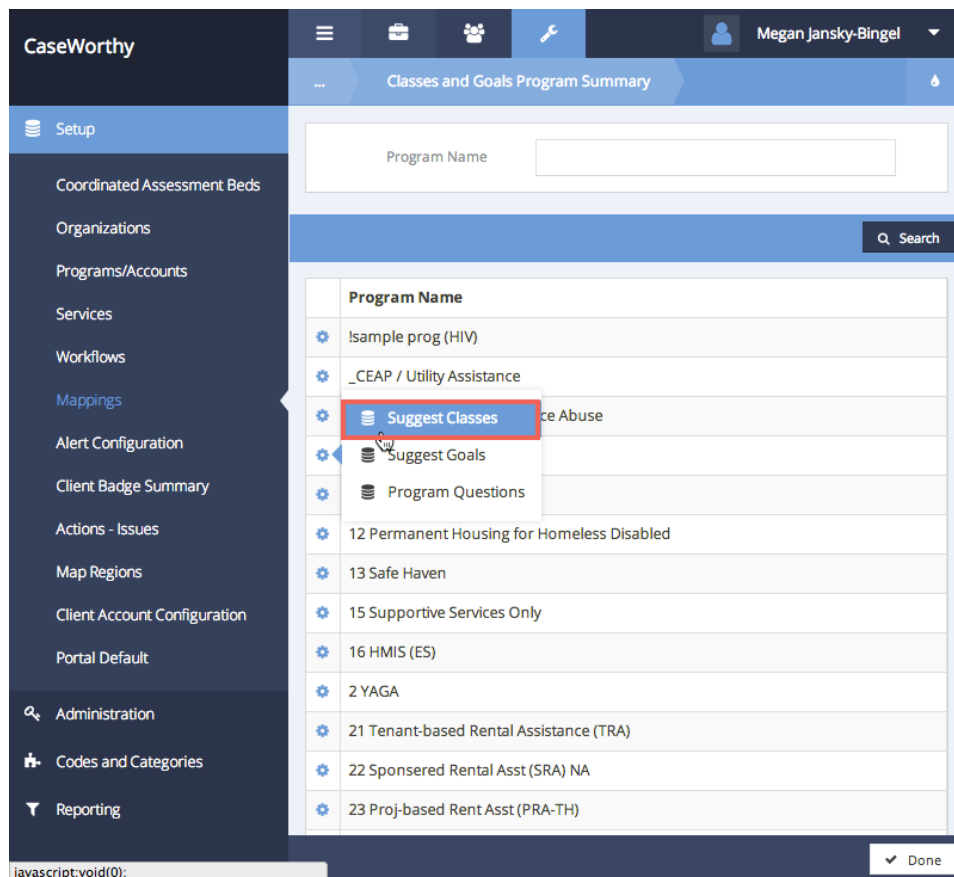
Programs can be mapped (linked) to various tasks/activities within CaseWorthy™. By linking to classes, users can get a list of classes that might be recommended for clients who are enrolled in the program. Linking programs to Goals filters the list of goals a user can select from. Linking to Program 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 when all relevant classes have been mapped.

CaseWorthy

Megan Jansky-Bingel

Choose Classes

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

Class	Resource Name	Provider Name	Class Location
<input checked="" type="checkbox"/> Afternoons	HS 4 Year Old	Head Start	
<input checked="" type="checkbox"/> Alternate Activities for families	YAGA 1		
<input checked="" type="checkbox"/> ATODs	YAGA 1		
<input checked="" type="checkbox"/> Auditorium	Hansen Planetarium	Head Start	
<input checked="" type="checkbox"/> Basic Nutrition Cl.	Training Room	CaseWo	
<input checked="" type="checkbox"/> Before/After School Care	Day Care	Catholic Charities	123 South Main Street, BOSTON, MA 02112
<input checked="" type="checkbox"/> Biweekly	Computer Lab	CaseWo	
<input checked="" type="checkbox"/> Camellion Class 2	Training Room 1 - 1st Floor, Main Bldg. Rm 210	CaseWorthy	740 East 3900 South, Salt Lake City, UT 84107
<input checked="" type="checkbox"/> Camellion Class 3	Training Room 1 - 1st Floor, Main Bldg. Rm 210	CaseWorthy	740 East 3900 South, Salt Lake City, UT 84107
<input checked="" type="checkbox"/> Camellion Class 4	Training Room 1 - 1st Floor, Main Bldg. Rm 210	CaseWorthy	740 East 3900 South, Salt Lake City, UT 84107

Save Cancel

Goals

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

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

CaseWorthy

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

Classes and Goals Program Summary

Program Name

Program Name

!sample prog (HIV)

Suggest Classes

Suggest Goals

Program Questions

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 Sponsored Rental Asst (SRA) NA

23 Proj-based Rent Asst (PRA-TH)

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.

CaseWorthy

Program Goal


Search

	Goal Description	Goal Category
<input checked="" type="checkbox"/>	GED Class	Education
<input checked="" type="checkbox"/>	Full-time Job	Employment
<input checked="" type="checkbox"/>	Part-time Job Desc	Employment
<input checked="" type="checkbox"/>	Acquire Stable Housing	Housing
<input checked="" type="checkbox"/>	Chip Benefits	Entitlements
<input checked="" type="checkbox"/>	Cooking	Basic Skills
<input checked="" type="checkbox"/>	Establish savings account	Financial
<input checked="" type="checkbox"/>	\$50 savings	Financial
<input checked="" type="checkbox"/>	Acquire needed docs	Legal
<input checked="" type="checkbox"/>	Acquire GED	Education
<input checked="" type="checkbox"/>	Get out of debt	Financial
<input checked="" type="checkbox"/>	Dexterity and control to use tools.	HS Fine Motor Skills
<input checked="" type="checkbox"/>	hand-eye coordination for using scissors and toys.	HS Fine Motor Skills
<input checked="" type="checkbox"/>	Hand-eye coordination in using writing	HS Fine Motor Skills

Save Cancel

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.

The screenshot displays the CaseWorthy System Administrator interface. The left sidebar lists various setup and configuration options. The main content area is titled 'Classes and Goals Program Summary'. It features a search bar for 'Program Name' and a table of program questions. A red box highlights the 'Program Questions' option in the table, and a tooltip menu is visible next to it with options: 'Suggest Classes', 'Suggest Goals', and 'Program Questions'.

Program Name
Isample prog (HIV)
Suggest Classes
Suggest Goals
Program Questions
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)

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

...

Program Question

...

Megan Jansky-Bingel

▼

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

Q Search

Question Category	
<input checked="" type="checkbox"/>	Housing Questions
<input checked="" type="checkbox"/>	Document Questions
<input checked="" type="checkbox"/>	Returning Survey
<input checked="" type="checkbox"/>	Employment Questions
<input checked="" type="checkbox"/>	Support Survey
<input checked="" type="checkbox"/>	Dummy Vals
<input checked="" type="checkbox"/>	Suvarna Vals
<input checked="" type="checkbox"/>	Risk/Needs Profile

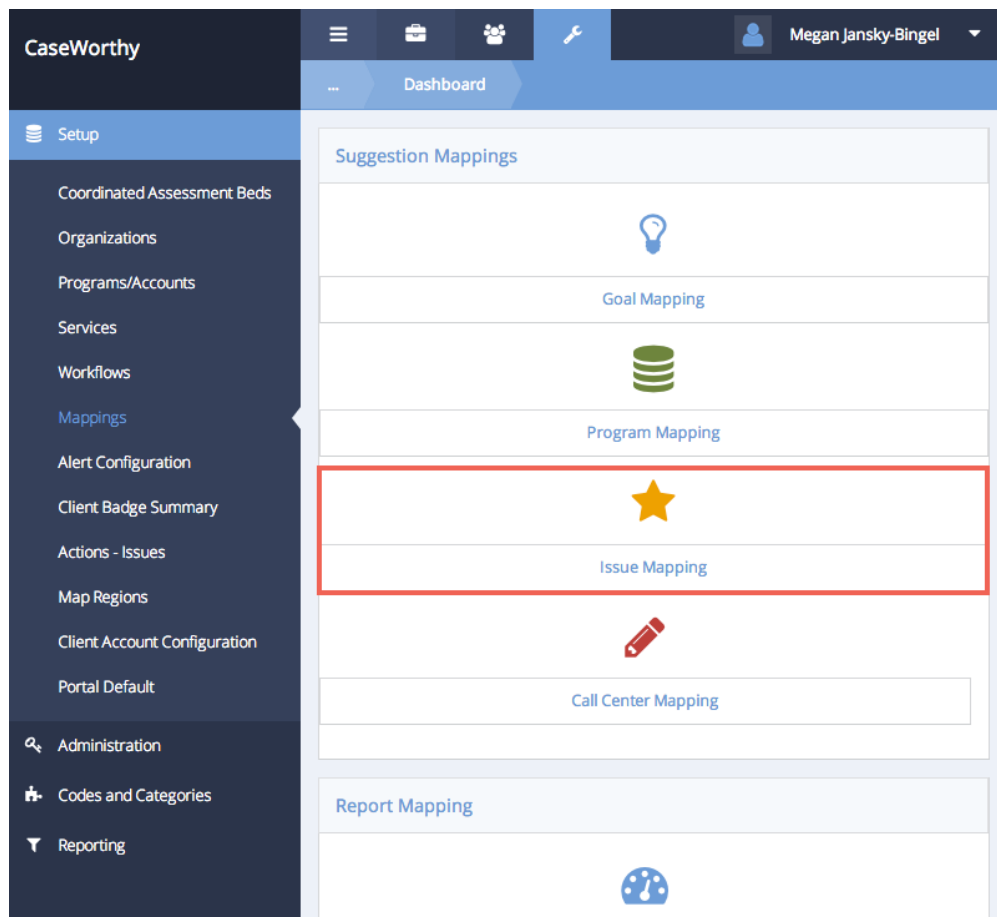
Save


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


The screenshot displays the CaseWorthy System Administrator interface. The top navigation bar includes the CaseWorthy logo, a menu icon, a briefcase icon, a group of people icon, a wrench icon, and a user profile for Adrian Eliason. The sidebar on the left contains the following navigation items: Setup, Organizations, Programs/Accounts, Services, Workflows, Mappings (highlighted), Alert Configuration, Batch Processes, Client Badge Summary, Actions - Issues, Map Regions, Client Account Configuration, Portal Default, Coordinated Assessment Beds, Administration, Codes and Categories, and Reporting. The main content area is titled 'Issues List for Mappings' and features a search bar with the following fields: 'Issue Description' and 'Issue Category'. A red box highlights the search bar area. Below the search bar is a table with the following data:

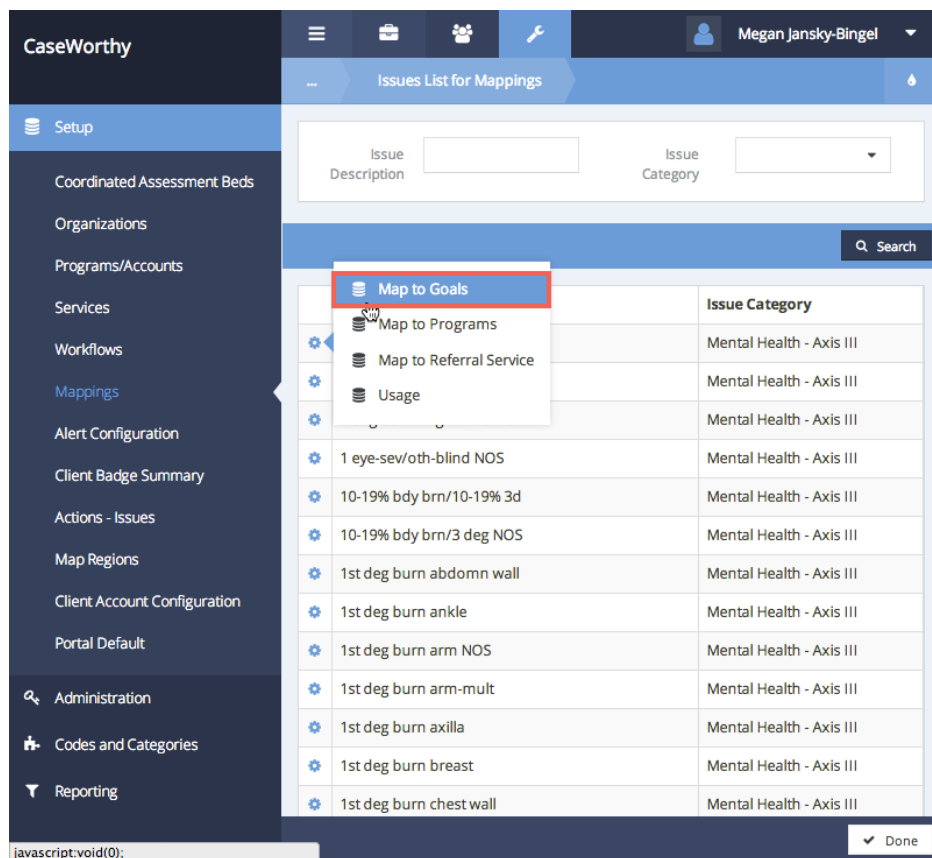
Issue Description	Issue Category
<24 comp wks gestation	Mental Health - Axis III
1 deg burn back of hand	Mental Health - Axis III
1 deg burn finger w thumb	Mental Health - Axis III
1 eye-sev/oth-blind NOS	Mental Health - Axis III
10-19% bdy brn/10-19% 3d	Mental Health - Axis III
10-19% bdy brn/3 deg 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

At the bottom right of the main content area is a 'Done' button. The bottom of the page shows a status bar with the text 'javascript:void(0);' on the left and a 'Done' button on the right.

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.



The screenshot shows the 'Issues List for Mappings' page in the CaseWorthy system. The left sidebar contains a navigation menu with sections: Setup, Administration, Codes and Categories, and Reporting. The 'Mappings' option under Setup is selected. The main content area shows a table of issues. A context menu is open for the first issue, with 'Map to Goals' highlighted. The table has two columns: 'Issue Description' and 'Issue Category'.

Issue Description	Issue Category
1 eye-sew/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

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 ▼

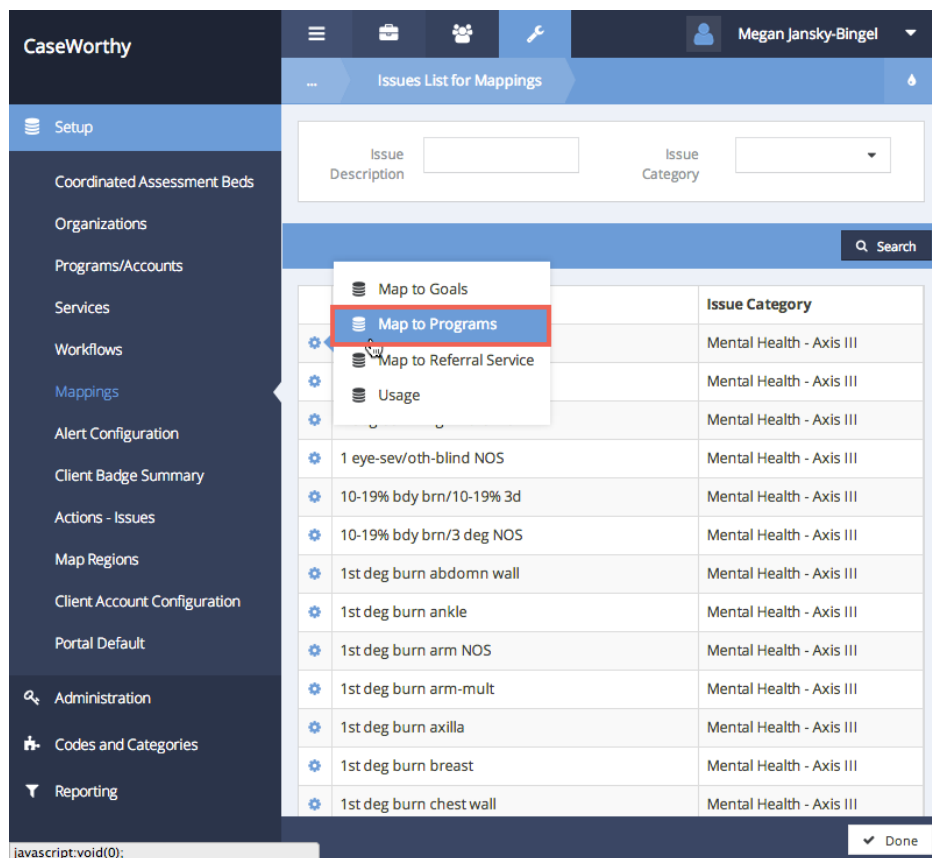
	Description	
<input checked="" type="checkbox"/>	\$50 savings	
<input checked="" type="checkbox"/>	Ability to follow rules and instructions.	
<input checked="" type="checkbox"/>	Ability to give and take in situations. (Sharing)	
<input checked="" type="checkbox"/>	Acquire GED	
<input checked="" type="checkbox"/>	Acquire needed docs	
<input checked="" type="checkbox"/>	Acquire Stable Housing	
<input checked="" type="checkbox"/>	Adequate, healthy food is available in the home	
<input checked="" type="checkbox"/>	Awareness of jobs and how to perform them.	
<input checked="" type="checkbox"/>	Children have safe, adequate sleeping arrangements	
<input checked="" type="checkbox"/>	Chip Benefits	
<input checked="" type="checkbox"/>	Comfort in talking and accepting rules from adults	
<input checked="" type="checkbox"/>	Control and balance in various activities.	
<input checked="" type="checkbox"/>	Cooking	
<input checked="" type="checkbox"/>	Coordinates movements in various activities.	
<input checked="" type="checkbox"/>	Daily Living Skills	
<input checked="" type="checkbox"/>	Demonstrates confidence in range of activities.	
<input checked="" type="checkbox"/>	Develop and express awareness of self.	
<input checked="" type="checkbox"/>	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.



Issue Description	Issue Category
1 eye-sew/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

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	
<input checked="" type="checkbox"/>	Isample prog (HIV)	
<input checked="" type="checkbox"/>	_CEAP / Utility Assistance	
<input checked="" type="checkbox"/>	_Employment with Substance Abuse	
<input checked="" type="checkbox"/>	09 Head Start	
<input checked="" type="checkbox"/>	1 English for Employment	
<input checked="" type="checkbox"/>	12 Permanent Housing for Homeless Disabled	
<input checked="" type="checkbox"/>	13 Safe Haven	
<input checked="" type="checkbox"/>	15 Supportive Services Only	
<input checked="" type="checkbox"/>	16 HMIS (ES)	
<input checked="" type="checkbox"/>	2 YAGA	
<input checked="" type="checkbox"/>	21 Tenant-based Rental Assistance (TRA)	
<input checked="" type="checkbox"/>	22 Sponsered Rental Asst (SRA) NA	
<input checked="" type="checkbox"/>	23 Proj-based Rent Asst (PRA-TH)	
<input checked="" type="checkbox"/>	24 Single Room Occupancy (SRO)	
<input checked="" type="checkbox"/>	25 Ryan White	
<input checked="" type="checkbox"/>	Adult Education	
<input checked="" type="checkbox"/>	BH Program	
<input checked="" type="checkbox"/>	Budgets Program	
<input checked="" type="checkbox"/>	Catholic Charities: All in One	
<input checked="" type="checkbox"/>	CC Adoption	
<input checked="" type="checkbox"/>	CC Asset Development	

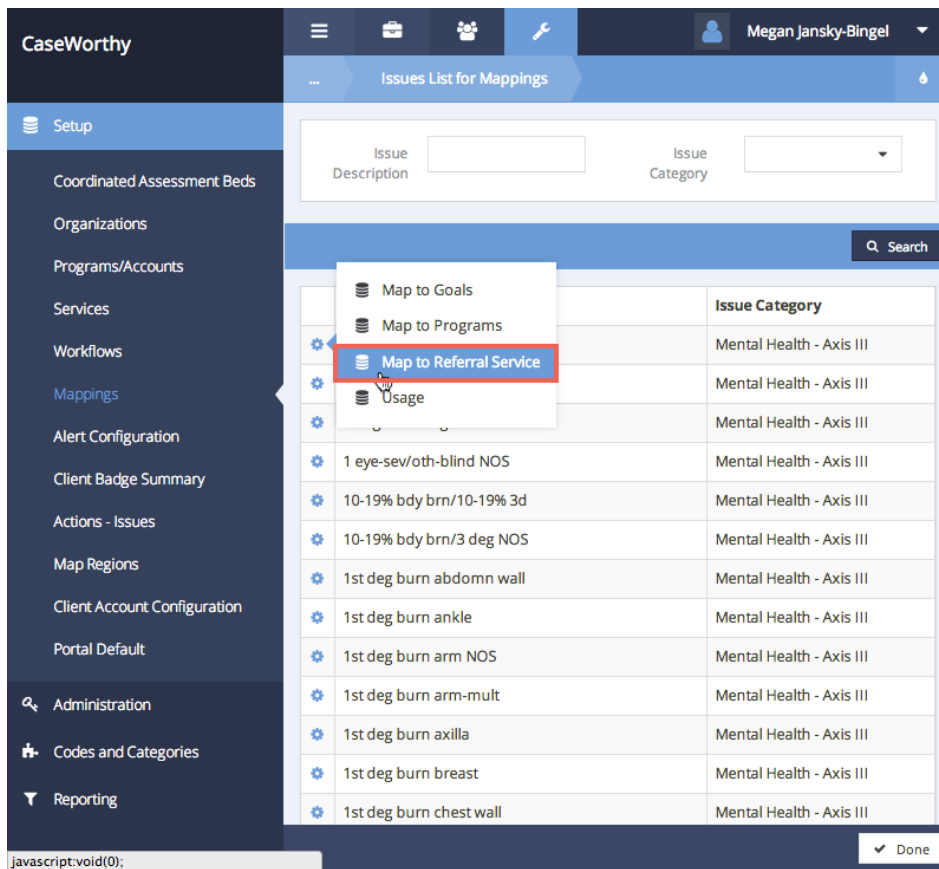
Save

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.



Issue Description	Issue Category
	Mental Health - Axis III
	Mental Health - Axis III
	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

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

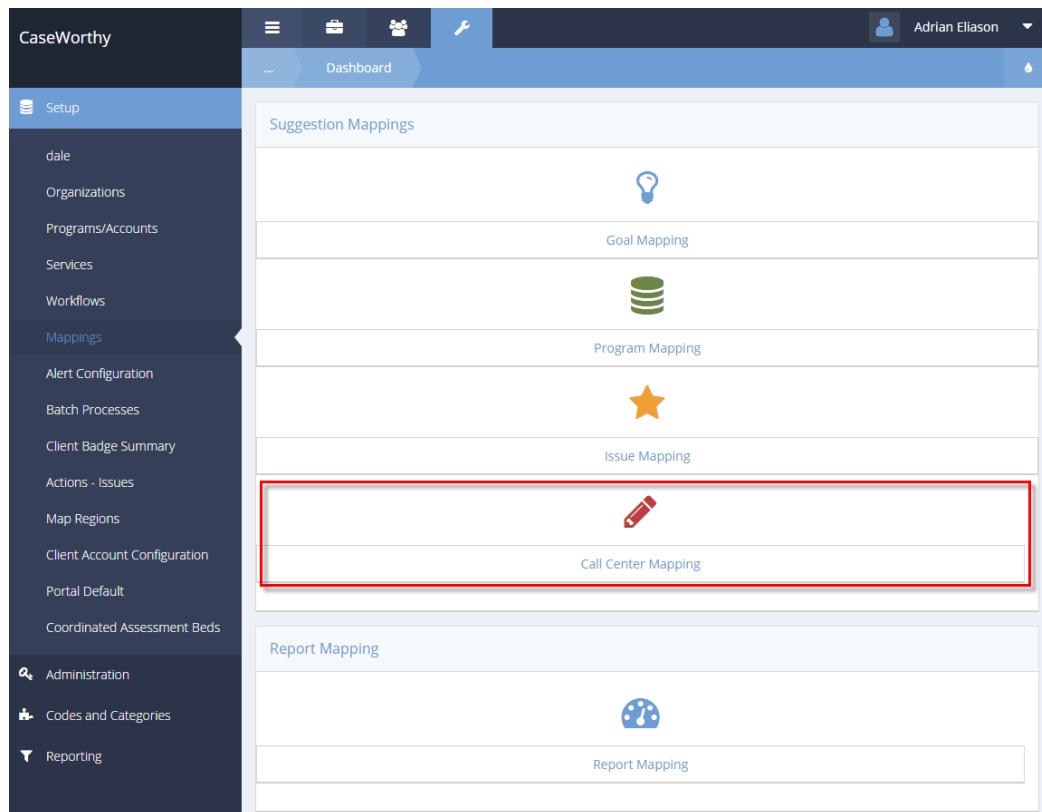
	Service	Provider	
<input checked="" type="checkbox"/>	AA Meeting		
<input checked="" type="checkbox"/>	ADC		
<input checked="" type="checkbox"/>	Adult Counseling Service		
<input checked="" type="checkbox"/>	AIDS Pharmaceutical Assistance		
<input checked="" type="checkbox"/>	Alcohol Counseling		
<input checked="" type="checkbox"/>	Alcohol or Drug Abuse Services		
<input checked="" type="checkbox"/>	Anger Management		
<input checked="" type="checkbox"/>	Assessment Fee for Adults		
<input checked="" type="checkbox"/>	Beauty School		
<input checked="" type="checkbox"/>	Bed/Crib		
<input checked="" type="checkbox"/>	Benefits Analysis		
<input checked="" type="checkbox"/>	Bus Tokens		
<input checked="" type="checkbox"/>	CA		
<input checked="" type="checkbox"/>	Carpet		
<input checked="" type="checkbox"/>	Case Management		
<input checked="" type="checkbox"/>	Child Care		
<input checked="" type="checkbox"/>	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 ☒.

CaseWorthy

Adrian Eliason

Call Center Service

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

	Caller Type	Call Type	Encounter Type	Service
<input checked="" type="checkbox"/>	Anonymous	Internal Referral	Phone	Community Education
<input checked="" type="checkbox"/>	Anonymous	Outside Referral	Phone	
<input checked="" type="checkbox"/>	Anonymous	Information	Phone	
<input checked="" type="checkbox"/>	Anonymous	Hangup	Phone	
<input checked="" type="checkbox"/>	Anonymous	Internal Referral	Walk-in	
<input checked="" type="checkbox"/>	Anonymous	Outside Referral	Walk-in	
<input checked="" type="checkbox"/>	Anonymous	Information	Walk-in	
<input checked="" type="checkbox"/>	Anonymous	Hangup	Walk-in	
<input checked="" type="checkbox"/>	New Client	Internal Referral	Phone	
<input checked="" type="checkbox"/>	New Client	Outside Referral	Phone	
<input checked="" type="checkbox"/>	New Client	Information	Phone	
<input checked="" type="checkbox"/>	New Client	Hangup	Phone	
<input checked="" type="checkbox"/>	New Client	Internal Referral	Walk-in	
<input checked="" type="checkbox"/>	New Client	Outside Referral	Walk-in	
<input checked="" type="checkbox"/>	New Client	Information	Walk-in	
<input checked="" type="checkbox"/>	New Client	Hangup	Walk-in	
<input checked="" type="checkbox"/>	Existing Client	Internal Referral	Phone	
<input checked="" type="checkbox"/>	Existing Client	Outside Referral	Phone	
<input checked="" type="checkbox"/>	Existing Client	Information	Phone	
<input checked="" type="checkbox"/>	Existing Client	Hangup	Phone	
<input checked="" type="checkbox"/>	Existing Client	Internal Referral	Walk-in	

Save Cancel

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

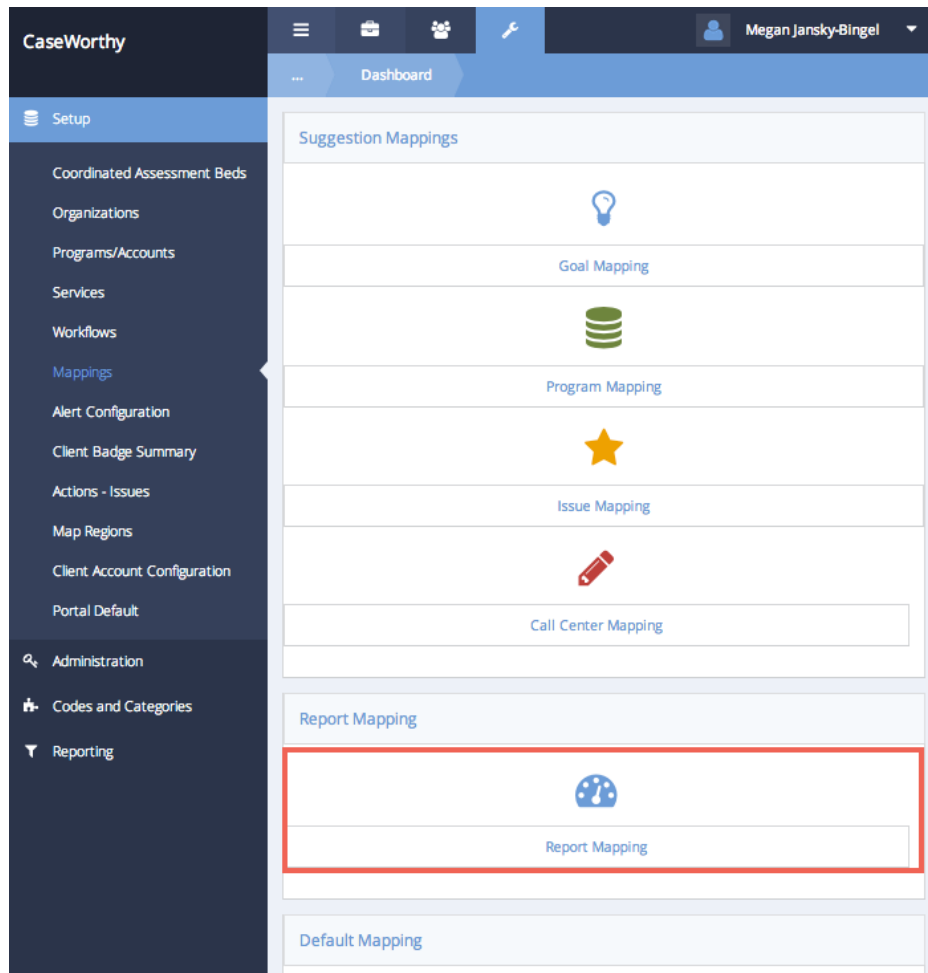
<input checked="" type="checkbox"/>	Anonymous	Outside Referral	Phone	
<input checked="" type="checkbox"/>	Anonymous	Information	Phone	
<input checked="" type="checkbox"/>	Anonymous	Hangup	Phone	
<input checked="" type="checkbox"/>	Anonymous	Internal Referral	Walk-in	
<input checked="" type="checkbox"/>	Anonymous	Outside Referral	Walk-in	
<input checked="" type="checkbox"/>	Anonymous	Information	Walk-in	
<input checked="" type="checkbox"/>	Anonymous	Hangup	Walk-in	

--Nothing--
 AA Meeting
 Bus Tokens
 Carpet
 Child Abuse
 Clothing
 Community Education
 Community Meeting

Report Mapping

(Administration>Setup>Mappings>Report Mapping)

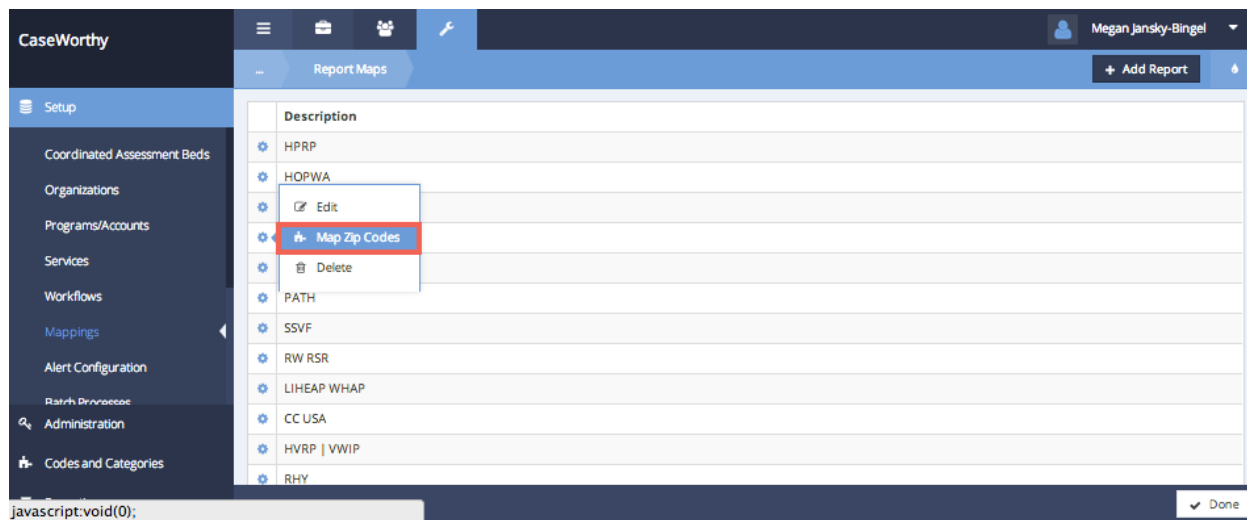
Many of the baseline reports in CaseWorthy™ require mapping. This allows organizations to link their services and/or issues to specific categories within the corresponding baseline report. To complete report mapping, select the “Report Mapping” icon on the Mapping dashboard.



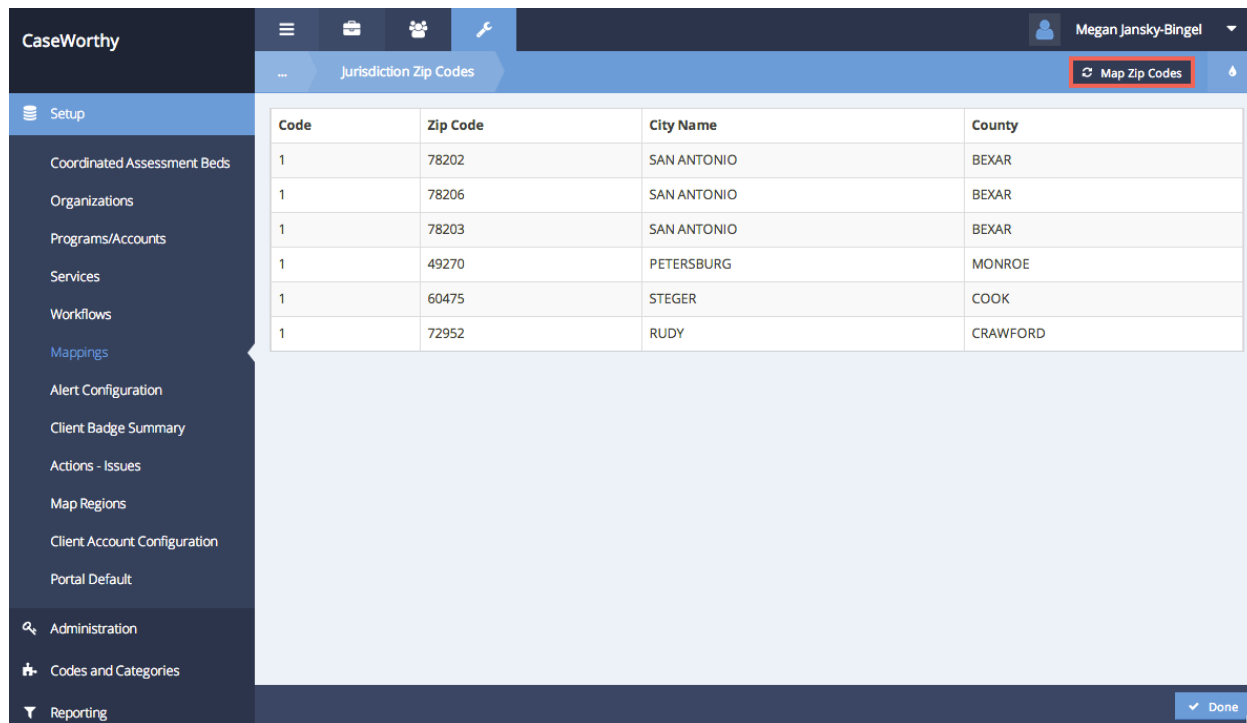
Map Zip Codes

(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”.

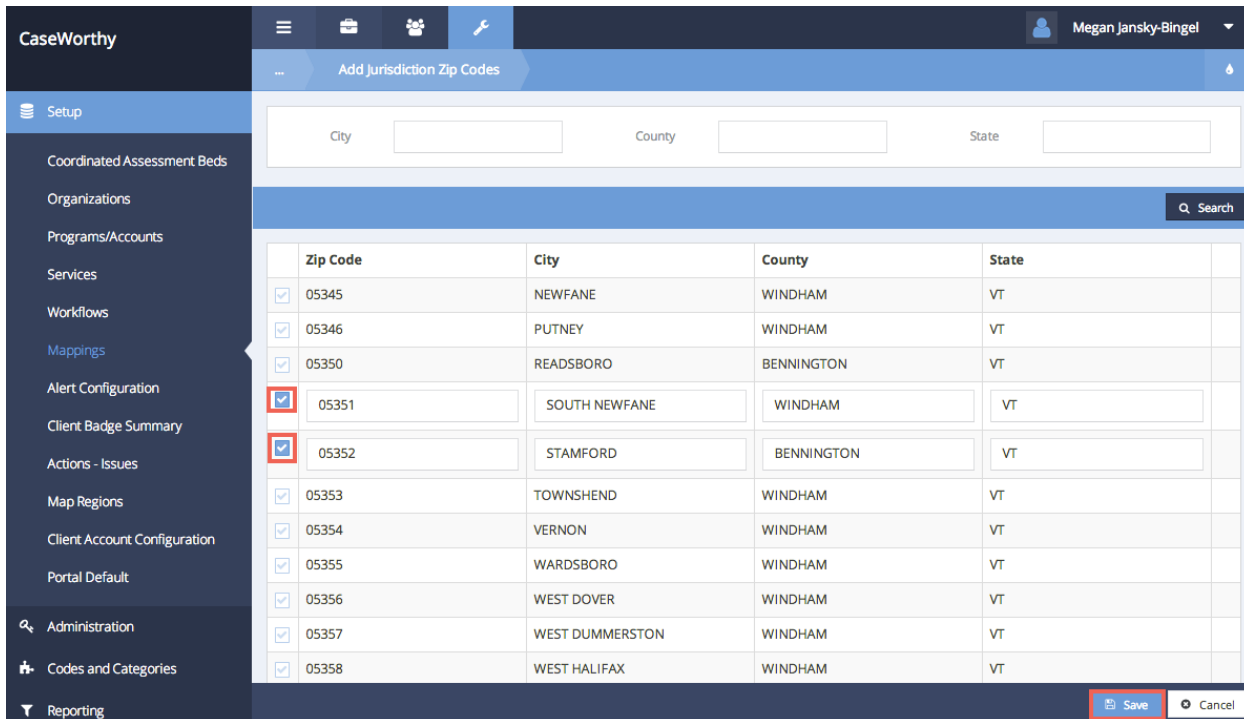


The Jurisdiction Zip Codes form displays. To add a zip code, click the “Map Zip Codes” button on the top right.



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.




The screenshot displays the 'Add Jurisdiction Zip Codes' page in the CaseWorthy system. The left sidebar contains navigation options: 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, and Reporting. The main content area has a header 'Add Jurisdiction Zip Codes' and a search bar. Below the search bar is a table with the following data:

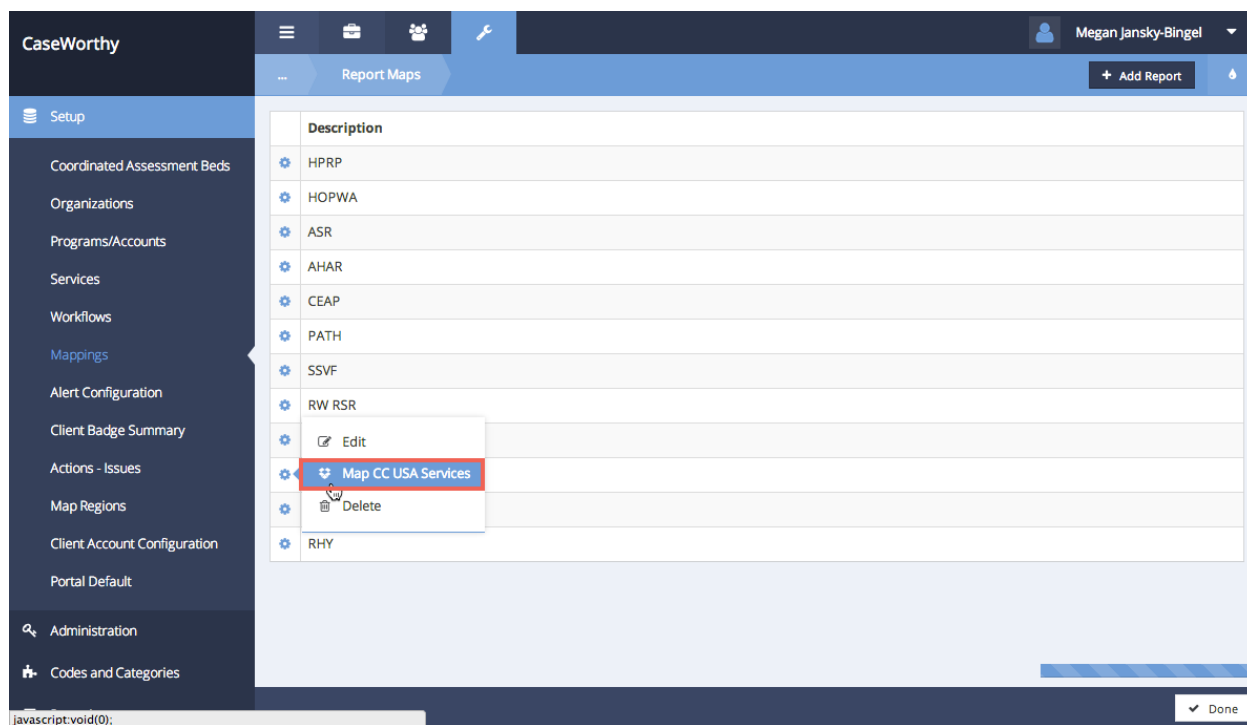
	Zip Code	City	County	State
<input checked="" type="checkbox"/>	05345	NEWFANE	WINDHAM	VT
<input checked="" type="checkbox"/>	05346	PUTNEY	WINDHAM	VT
<input checked="" type="checkbox"/>	05350	READSBORO	BENNINGTON	VT
<input checked="" type="checkbox"/>	05351	SOUTH NEWFANE	WINDHAM	VT
<input checked="" type="checkbox"/>	05352	STAMFORD	BENNINGTON	VT
<input checked="" type="checkbox"/>	05353	TOWNSHEND	WINDHAM	VT
<input checked="" type="checkbox"/>	05354	VERNON	WINDHAM	VT
<input checked="" type="checkbox"/>	05355	WARDSBORO	WINDHAM	VT
<input checked="" type="checkbox"/>	05356	WEST DOVER	WINDHAM	VT
<input checked="" type="checkbox"/>	05357	WEST DUMMERSTON	WINDHAM	VT
<input checked="" type="checkbox"/>	05358	WEST HALIFAX	WINDHAM	VT

At the bottom right, there are 'Save' and 'Cancel' buttons. The 'Save' button is highlighted with a red box in the original image.

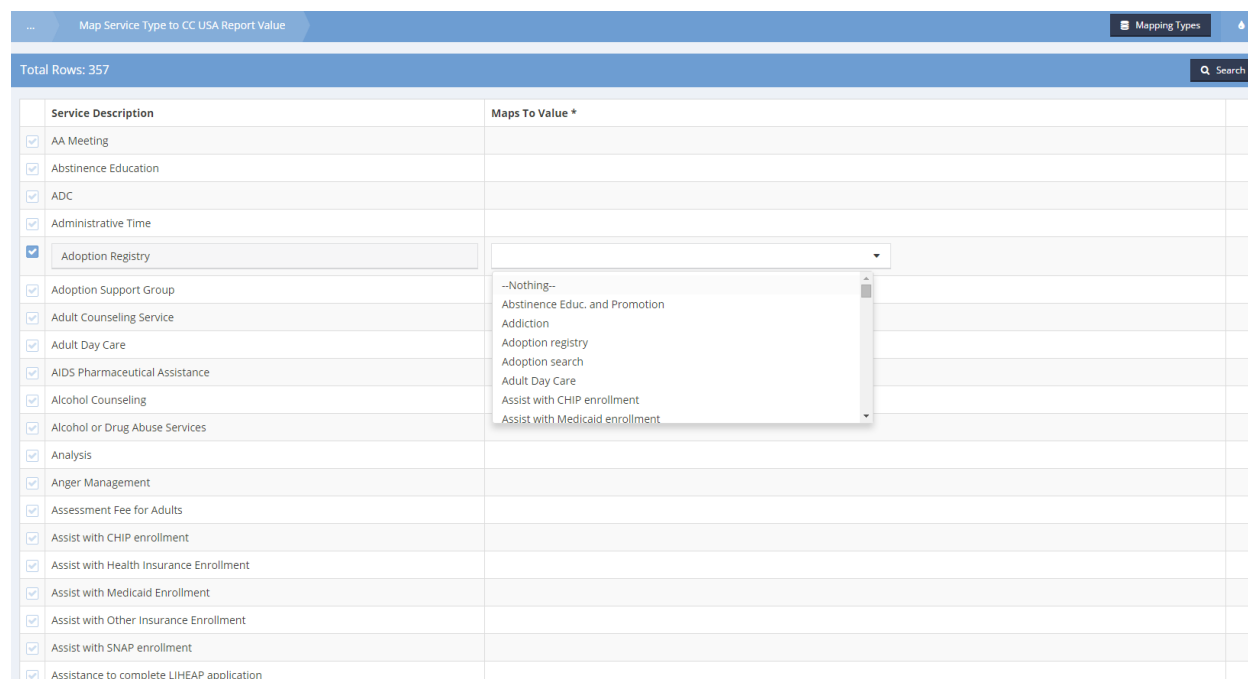
Map Services

(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".




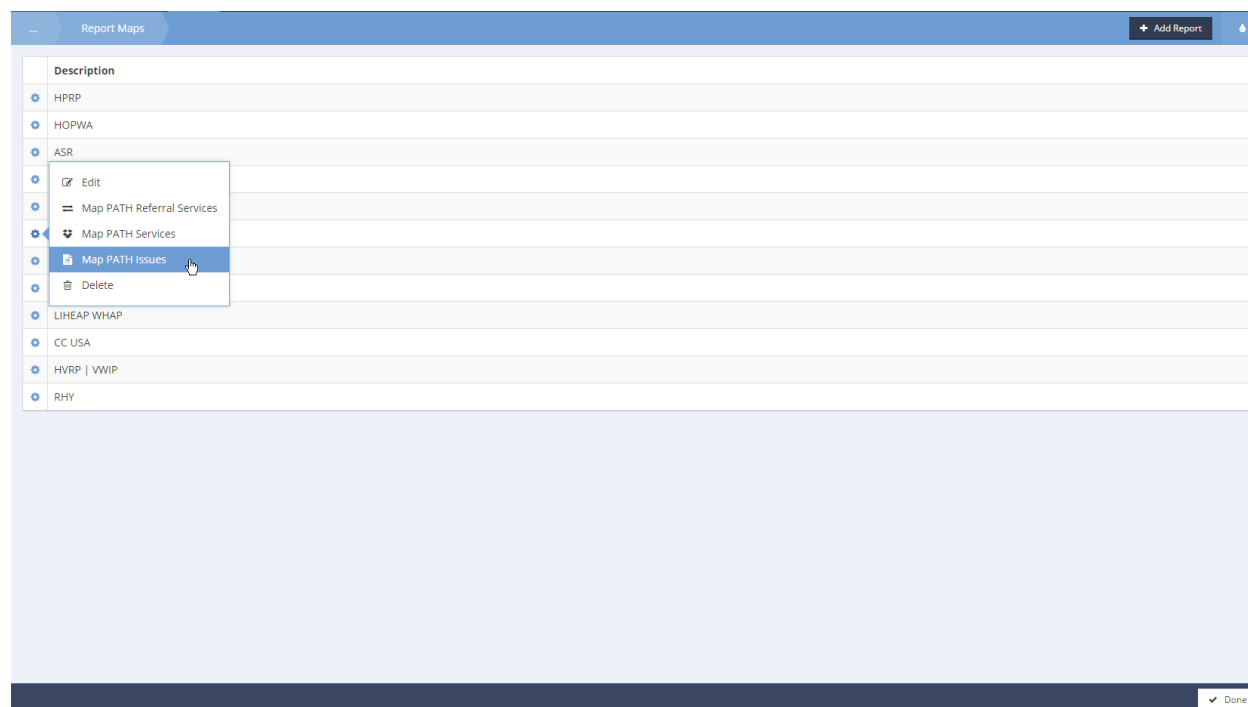
A list of all the services entered into the system displays (To learn more about creating services in CaseWorthy™, refer to the Services section of this manual.). To map a service, click on the clear checkbox ☐ next to the desired service(s). Use the drop-down list to link the CaseWorthy™ service to 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 PATH Report Value

Mapping Types

Search

Issue Description	Maps To Value *
<input checked="" type="checkbox"/> ~24 comp wks gestation	
<input checked="" type="checkbox"/> 1 deg burn back of hand	--Nothing--
<input checked="" type="checkbox"/> 1 deg burn fingr w thumb	Affective Disorders
<input checked="" type="checkbox"/> 1 eye-sev/oth-blind NOS	Other Psychotic Disorders
<input checked="" type="checkbox"/> 10-19% bdy brn/10-19% 3d	Other serious mental illness
<input checked="" type="checkbox"/> 10-19% bdy brn/3 deg NOS	Personality Disorders
<input checked="" type="checkbox"/> 1st deg burn abdomn wall	Schizophrenia and Related Disorders
<input checked="" type="checkbox"/> 1st deg burn ankle	Unknown or undiagnosed serious mental illness
<input checked="" type="checkbox"/> 1st deg burn arm NOS	
<input checked="" type="checkbox"/> 1st deg burn arm-mult	
<input checked="" type="checkbox"/> 1st deg burn axilla	
<input checked="" type="checkbox"/> 1st deg burn breast	
<input checked="" type="checkbox"/> 1st deg burn chest wall	
<input checked="" type="checkbox"/> 1st deg burn chin	
<input checked="" type="checkbox"/> 1st deg burn ear	
<input checked="" type="checkbox"/> 1st deg burn elbow	
<input checked="" type="checkbox"/> 1st deg burn eye	
<input checked="" type="checkbox"/> 1st deg burn face NEC	
<input checked="" type="checkbox"/> 1st deg burn finger	
<input checked="" type="checkbox"/> 1st deg burn foot	


Save Cancel

Map Issue Type to Report Value (VISPDAT)


(Administration>Setup>Mappings)

Mappings


Suggestion Mappings




Program Mapping



Goal Mapping




Issue Mapping




Call Center Mapping

Report Mapping



Report Mapping

Default Mapping



Default Mapping

Click the icon for Report Mapping.




Report Maps		+ Add Report
Total Rows: 12		
Description	Compliance Report ID	
HOPWA	2	
ASR	7	
AHAR	8	
CEAP	9	
PATH	10	
SSVF	11	
LIHEAP WHAP	13	
CC USA	14	
HVRP VWIP	15	
RHY	16	
VI SPDAT	19	
HUD 9902	20	

The Report Maps form displays.

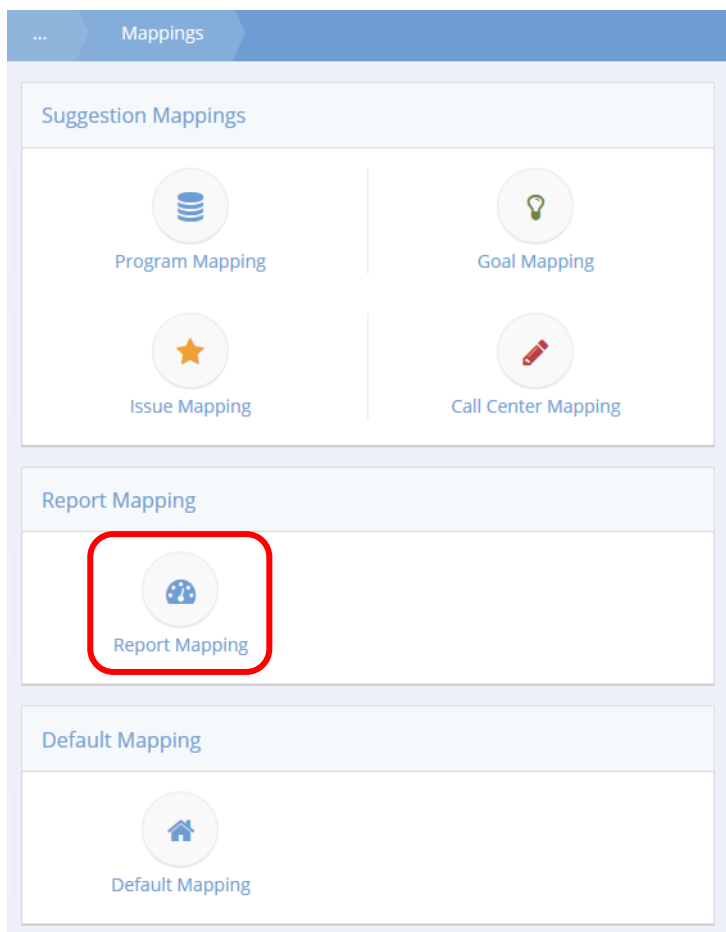
Report Maps	
Total Rows: 12	
Description	
HOPWA	
ASR	
AHAR	
CEAP	
PATH	
SSVF	
LIHEAP WHAP	
CC USA	
HVRP VWIP	
VI SPDAT	<div> Edit Map VI SPDAT Issues Delete </div>
HUD 9902	

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.



The screenshot shows the 'Report Maps' form. At the top, there is a header bar with 'Report Maps' and an 'Add Report' button. Below the header, a blue bar indicates 'Total Rows: 12'. The main table has two columns: 'Description' and 'Compliance Report ID'. The table lists 12 reports, including HOPWA, ASR, AHAR, CEAP, PATH, SSVF, LIHEAP WHAP, CC USA, and HVRP | VWIP. A context menu is open for the 'CC USA' report, showing options: 'Edit', 'Map CC USA Services', 'Map CCUSA Issues' (highlighted), and 'Delete'.

Description	Compliance Report ID
HOPWA	2
ASR	7
AHAR	8
CEAP	9
PATH	10
SSVF	11
LIHEAP WHAP	13
CC USA	14
HVRP VWIP	15

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

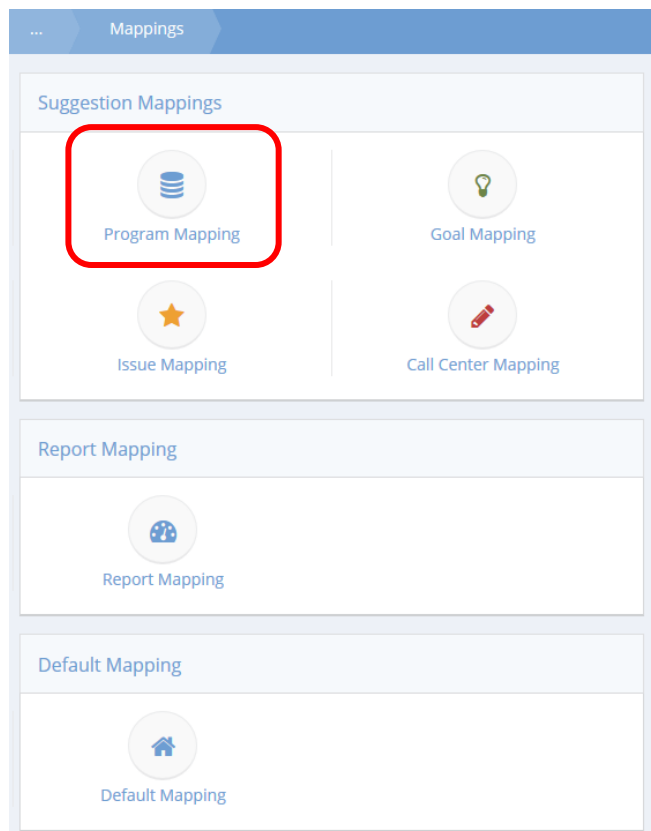
The screenshot shows the 'Map Issue Type to CC USA Report Value' form. The header bar includes 'Map Issue Type to CC USA Report Value' and 'CC USA'. A 'Mapping Types' button is in the top right. The form has a 'Description' field and a 'Category' dropdown menu. Below these, a blue bar indicates 'Total Rows: 1000'. A search bar with a magnifying glass icon and the word 'Search' is on the right. The main table has two columns: 'Issue Description' and 'Maps To Value *'. The table lists various issue descriptions, including '1 eye-sev/oth-blind NOS', '10-19% bdy brn/3 deg NOS', '1st deg burn abdomn wall', '1st deg burn ankle', '1st deg burn arm NOS', '1st deg burn arm-mult', '1st deg burn axilla', '1st deg burn breast', and '1st deg burn chest wall'. A red box highlights the '10-19% bdy brn/3 deg NOS' row, and another red box highlights the 'Maps To Value *' dropdown menu, which shows options: '--Nothing--' and 'abuse/neglect'.

Issue Description	Maps To Value *
<input checked="" type="checkbox"/> 1 eye-sev/oth-blind NOS	
<input checked="" type="checkbox"/> 10-19% bdy brn/3 deg NOS	
<input checked="" type="checkbox"/> 1st deg burn abdomn wall	
<input checked="" type="checkbox"/> 1st deg burn ankle	
<input checked="" type="checkbox"/> 1st deg burn arm NOS	
<input checked="" type="checkbox"/> 1st deg burn arm-mult	
<input checked="" type="checkbox"/> 1st deg burn axilla	
<input checked="" type="checkbox"/> 1st deg burn breast	
<input checked="" type="checkbox"/> 1st deg burn chest wall	

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  Save when finished.

Suggest Plan Program (Summary)


(Administration>Setup>Mappings)



Click the icon for Program Mapping.

The Program Summary form displays.

Program Summary			
Program Name <input type="text"/>			
Total Rows: 140 Q Search			
Program Name	Program Begin - End Dates	Program ID	
Isample prog (HIV)	10/10/2011 - Present	151	
_CEAP / Utility Assistance	2/25/2013 - Present	98	
_Employment with Substance Abuse	2/6/2013 - Present	105	
09 Head Start	11/21/2012 - Present	58	
1 English for Employment	11/9/2012 - Present	94	
12 Permanent Housing for Homeless Disabled	3/15/2013 - Present	42	
13 Safe Haven	6/25/2013 - Present	43	

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

Program Summary

Program Name

Total Rows: 4

	Program Begin - End Dates	Program ID
10/10/2011 - Present	151	
2/25/2013 - Present	98	
2/6/2013 - Present	105	
11/21/2012 - Present	58	

The Suggest Program Plan form displays.

Suggest Program Plan | Sample prog (HIV)

+ Add New

Plan Type	% Complete Method	Total Plan Days	# of Goals
Phase1	Calculate from Steps	90	4
Phase3	Calculate from Goals	90	2

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

Suggest Program Plan

Plan Types Plan Target Due Days

Percent Complete Method

Total Rows: 52

Goal Description	Restriction	Suggest ID
<input checked="" type="checkbox"/> GED Class		
<input checked="" type="checkbox"/> Full-time Job	Shared	
<input checked="" type="checkbox"/> Responsibility *	Target Days <input type="text"/> Weight % <input type="text"/> Required <input type="text"/>	
<input checked="" type="checkbox"/> Part-time Job Desc		

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.

Suggest Program Plan | Sample prog (HIV)

+ Add New


	% Complete Method	Total Plan Days	# of Goals
<input checked="" type="checkbox"/> Edit	Calculate from Steps	90	4
<input checked="" type="checkbox"/> Delete	Calculate from Goals	90	2

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

Suggest Program Plan

Plan Types Plan Target Due Days












Percent Complete Method


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.

Report Maps			
Total Rows: 17			
	Description	Compliance Report ID	
	HOPWA	2	
	ASR	7	
	AHAR	8	
	CEAP	9	
	PATH	10	
	SSVF	11	
	LIHEAP WHAP	13	
	CC USA	14	
	HVRP I VMIP	15	

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 *	
<input checked="" type="checkbox"/>	(Idiopathic) normal pressure hydrocephalus		
<input checked="" type="checkbox"/>	(Induced) termination of pregnancy with other complications		
<input checked="" type="checkbox"/>	(Induced) termination of pregnancy with unsp complications		
<input checked="" type="checkbox"/>	.OrgAlssue		
<input checked="" type="checkbox"/>	<24 comp wks gestation		
<input checked="" type="checkbox"/>	1 deg burn back of hand		
<input checked="" type="checkbox"/>	1 deg burn fingr w thumb		
<input checked="" type="checkbox"/>	1 eye-sew/oth-blind NOS		
<input checked="" type="checkbox"/>	10 weeks gestation of pregnancy		
<input checked="" type="checkbox"/>	10-19% bdy brn/10-19% 3d		
<input checked="" type="checkbox"/>	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.

Total Rows: 1 Q Search

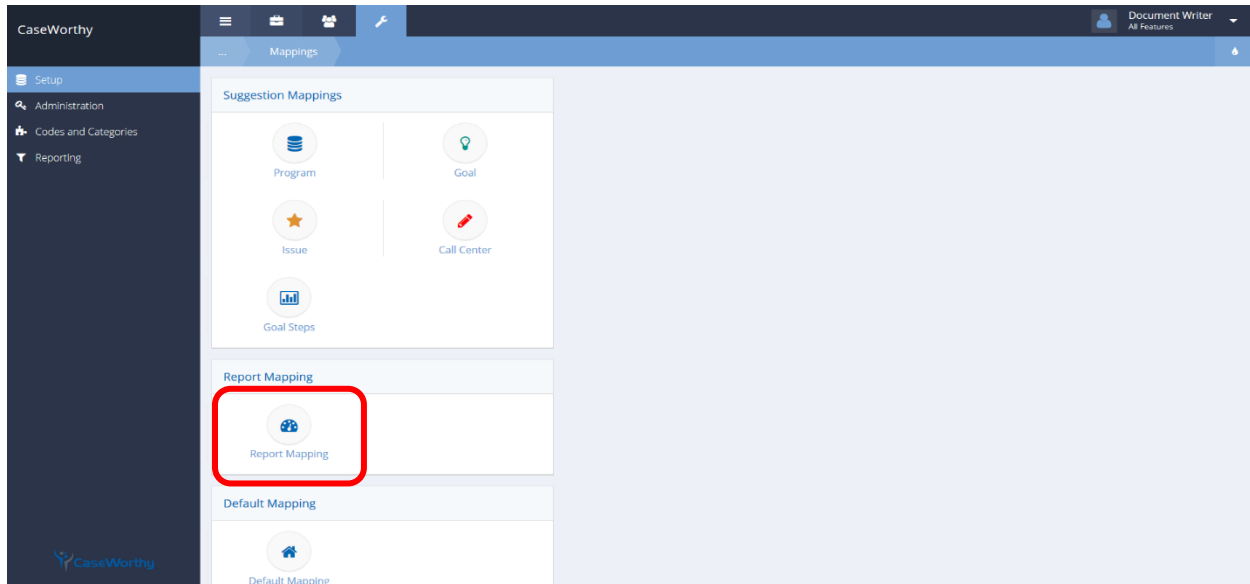
	Issue Description	Maps To Value *	
<input checked="" type="checkbox"/>	(Idiopathic) normal pressure hydrocephalus		
<input checked="" type="checkbox"/>	(Induced) termination of pregnancy with other complications		
<input checked="" type="checkbox"/>	(Induced) termination of pregnancy with unsp complications	<input type="text" value=""/>	
<input checked="" type="checkbox"/>	.OrgAlIssue		

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.

...


Report Maps

+ Add Report

Total Rows: 12

	Description	Compliance Report ID
	HOPWA	2
	ASR	7
	AHAR	8
	CEAP	9
	PATH	10
	SSVF	11
	LIHEAP WHAP	13
	CC USA	14
	HVRP VWIP	15
	RHY	16
	VI SPDAT	19
	HUD 9902	20

Done

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

... Report Maps

Total Rows: 12

	Description
⚙	HOPWA
⚙	ASR
⚙	AHAR
⚙	CEAP
⚙	PATH
⚙	SSVF
⚙	LIHEAP WHAP
⚙	<div> Edit Map RHY Services Map RHY Referral Services Map RHY Issues Delete </div>


The Map Issue Type RHY Report Value form displays.

... Map Issue Type to RHY Report Value RHY Mapping Types

Total Rows: 26

	Issue Description	Maps To Value *
<input checked="" type="checkbox"/>	Abuse and Neglect - Family member	Abuse and Neglect - Family member
<input checked="" type="checkbox"/>	Abuse and Neglect - Youth	Abuse and Neglect - Youth
<input checked="" type="checkbox"/>	Active Military Parent - Family member	Active Military Parent - Family member
<input checked="" type="checkbox"/>	Alcohol or other drug abuse - Family member	Alcohol or other drug abuse - Family member
<input checked="" type="checkbox"/>	Alcohol or other drug abuse - Youth	Alcohol or other drug abuse - Youth
<input checked="" type="checkbox"/>	Both parents/legal guardians of youth incarcerated	Both parents/legal guardians of youth incarcerated
<input checked="" type="checkbox"/>	Health Issues - Family member	Health Issues - Family member
<input checked="" type="checkbox"/>	Health Issues - Youth	Health Issues - Youth
<input checked="" type="checkbox"/>	Household Dynamics	Household Dynamics
<input checked="" type="checkbox"/>	Housing Issues - Family member	Housing Issues - Family member
<input checked="" type="checkbox"/>	Housing Issues - Youth	Housing Issues - Youth
<input checked="" type="checkbox"/>	Insufficient Income to support youth - Family member	Insufficient Income to support youth - Family member
<input checked="" type="checkbox"/>	Mental Disability - Family member	Mental Disability - Family member
<input checked="" type="checkbox"/>	Mental Disability - Youth	Mental Disability - Youth
<input checked="" type="checkbox"/>	Mental Health Issues - Family member	Mental Health Issues - Family member
<input checked="" type="checkbox"/>	Mental Health Issues - Youth	Mental Health Issues - Youth

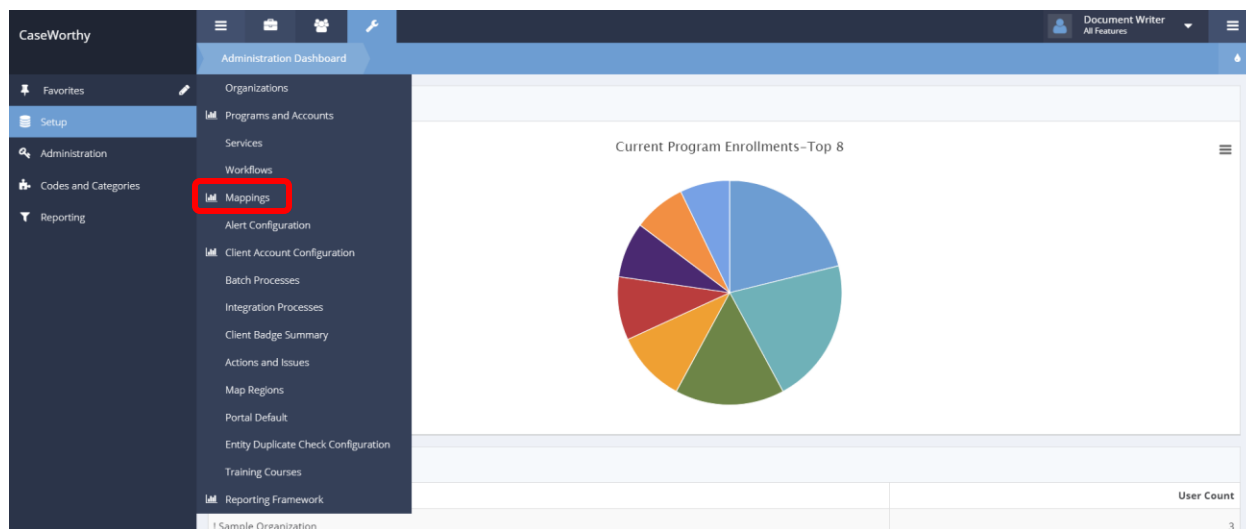
Save Cancel

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.

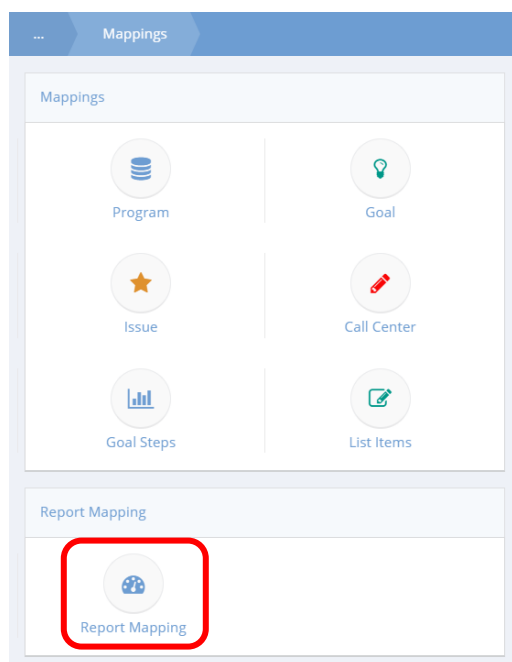
Map Service Type to Report Value (Generic)

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.

Report Maps		+ Add Report	
	Description		Compliance Report ID
	LIHEAP WHAP		13
	CC USA		14
	HVRP VWIP		15
	RHY		16
	VI SPDAT		19
	HUD 9902		20
	PIR		21
	Service Plan Report		27
	Test Report		28
	RSR		29
	Child Plan of Service Report		30
	Daily Meal Count and Attendance		31
	HMIS General Mapping (multiple reports affected)		37

Done

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

		28
	<div><div>Edit</div><div>Map RSR Services</div><div>Delete</div></div>	29
		30
	Daily Meal Count and Attendance	31
	HMIS General Mapping (multiple reports affected)	37

Select Map RSR Services from the pop-up menu.

The Map Service Type to Report Value form appears.

	Service Description	Maps To Value *
<input checked="" type="checkbox"/>	Education	
<input checked="" type="checkbox"/>	Employment Assistance	
<input checked="" type="checkbox"/>	Transportation	
<input checked="" type="checkbox"/>	Food	Food bank/home-delivered meals
<input checked="" type="checkbox"/>	Case Management	
<input checked="" type="checkbox"/>	Substance Abuse	
<input checked="" type="checkbox"/>	Housing Placement	
<input checked="" type="checkbox"/>	Financial Services	
<input checked="" type="checkbox"/>	Food Pantry	Food bank/home-delivered meals
<input checked="" type="checkbox"/>	Food Pantry	Food bank/home-delivered meals
<input checked="" type="checkbox"/>	Utility Deposit	
<input checked="" type="checkbox"/>	Utility Assistance	
<input checked="" type="checkbox"/>	Rental Assistance	

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

<input checked="" type="checkbox"/>	Food	Food bank/home-delivered meals
<input checked="" type="checkbox"/>	Case Management	
<input checked="" type="checkbox"/>	Substance Abuse	
<input checked="" type="checkbox"/>	Housing Placement	

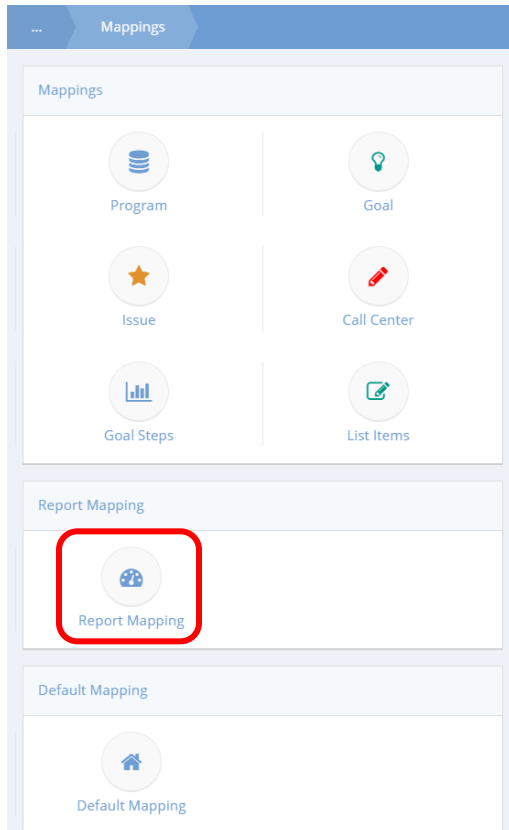
The icons turns blue ☒ and a drop-down-menu appears under the Maps To Value category. Use the drop-down menu to select a report value. After all new Services and Values are chosen, click the Save button to return to the Report Maps page.

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.

Report Maps			+ Add Report	
⚙	Service Plan Report			27
⚙	Test Report			28
⚙	RSR			29
⚙	Child Plan of Service Report			30
⚙	Daily Meal Count and Attendance			31
⚙	HMIS General Mapping (multiple reports affected)			37

✓ Done

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

Test Report	28
✎ Edit	29
🗺 Map CPOS Issues	30
🗑 Delete	31

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

...	Map Issue Type to Report Value	Child Plan of Service Report	Mapping Types
Total Rows: 6			
Issue Description	Maps To Value *		
<input checked="" type="checkbox"/> Alcohol or Substance Abuse - Family member			
<input checked="" type="checkbox"/> Insufficient Income to support youth - Family member			
<input checked="" type="checkbox"/> Mental Health Issues - Family member			
<input checked="" type="checkbox"/> One parent/legal guardian of youth incarcerated			
<input checked="" type="checkbox"/> Physical Disability - Family member			
<input checked="" type="checkbox"/> Unemployment - Family member			

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.

...	Map Issue Type to Report Value	Child Plan of Service Report	Mapping Types
Total Rows: 1			
Issue Description	Maps To Value *		
<input checked="" type="checkbox"/> Alcohol or Substance Abuse - Family member			
<input checked="" type="checkbox"/> Insufficient Income to support youth - Family member			
<input checked="" type="checkbox"/> Mental Health Issues - Family member			
<input checked="" type="checkbox"/> One parent/legal guardian of youth incarcerated			
<input checked="" type="checkbox"/> Physical Disability - Family member			
<input checked="" type="checkbox"/> Unemployment - Family member			


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

Workflows


(Administration>Setup>Workflows)

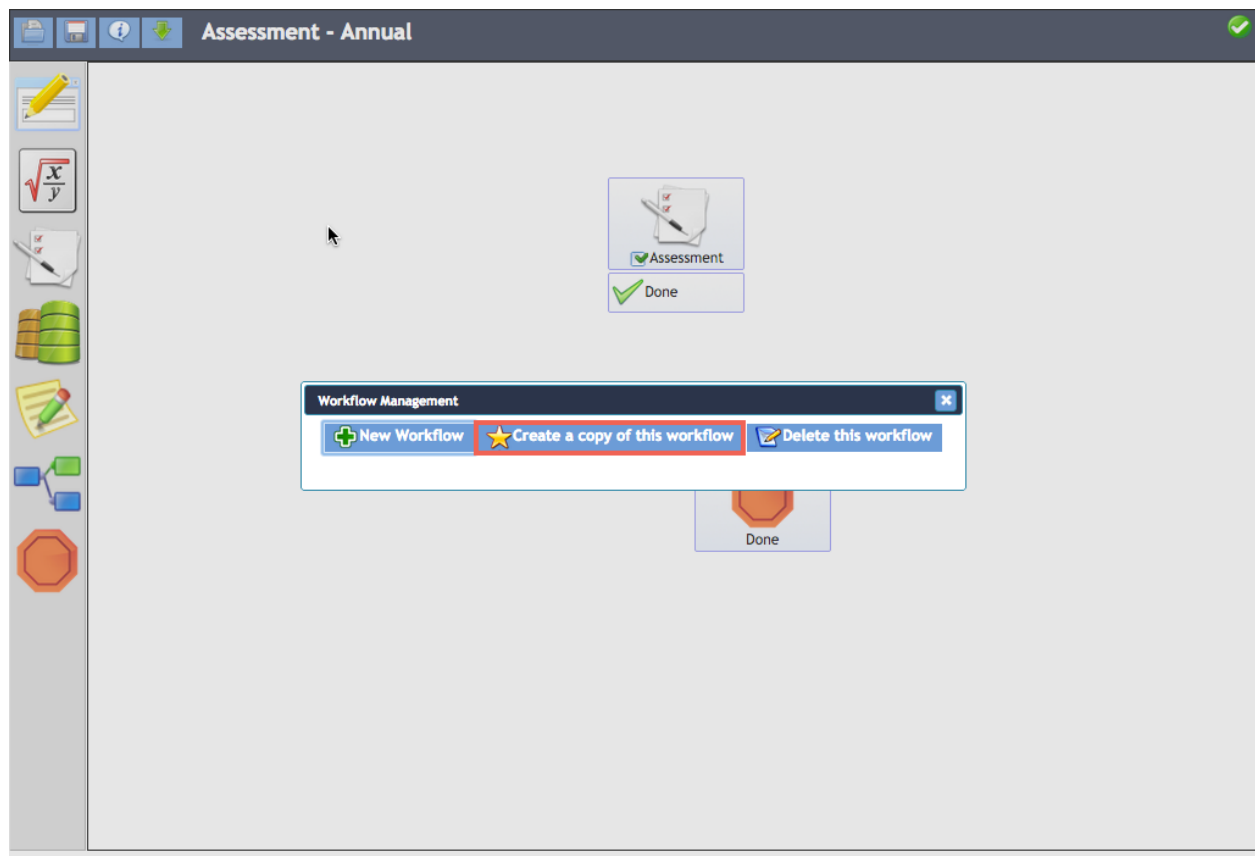
“Workflows” is a feature within CaseWorthy™ which carries the user smoothly through a pre-defined process by automating the progression of work. Workflows are great tools to implement any time a user needs to complete two or more forms as part of a data collection process or client interaction. Once 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”.

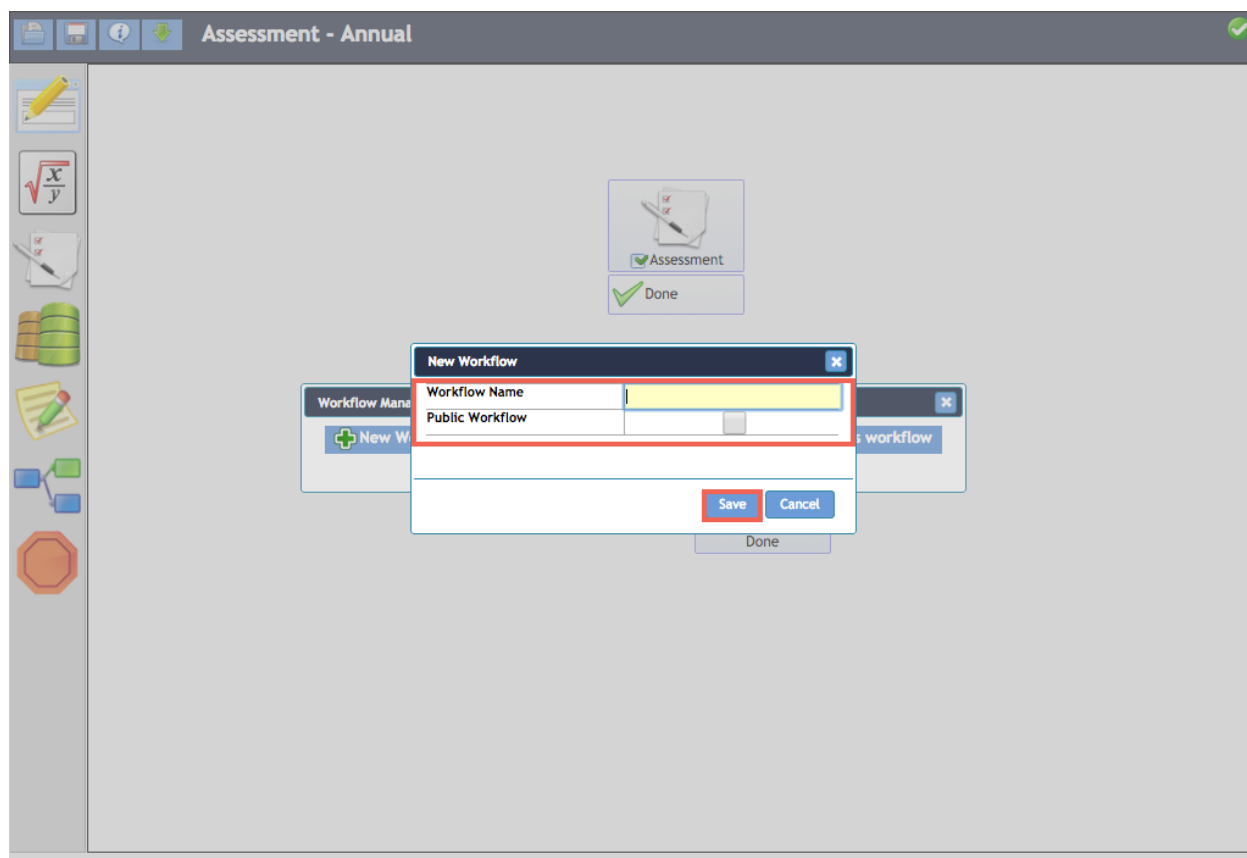
Workflow Name	Created Date	Created By	Workflow ID
	7/31/2014	Gummadapu	199
	4/2/2010		70
Assessment - Entry	4/2/2010		69
Assessment - Exit	4/2/2010		71
BH Common Intake	11/11/2014	Wilson	206
Call Center W/ Alert	12/3/2013	Tjoe	182
CCP Intake	2/2/2013		161
Client Intake w Reservation	11/29/2012		160
Client 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
Create Job Order Workflow	3/14/2014	Allen	188

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

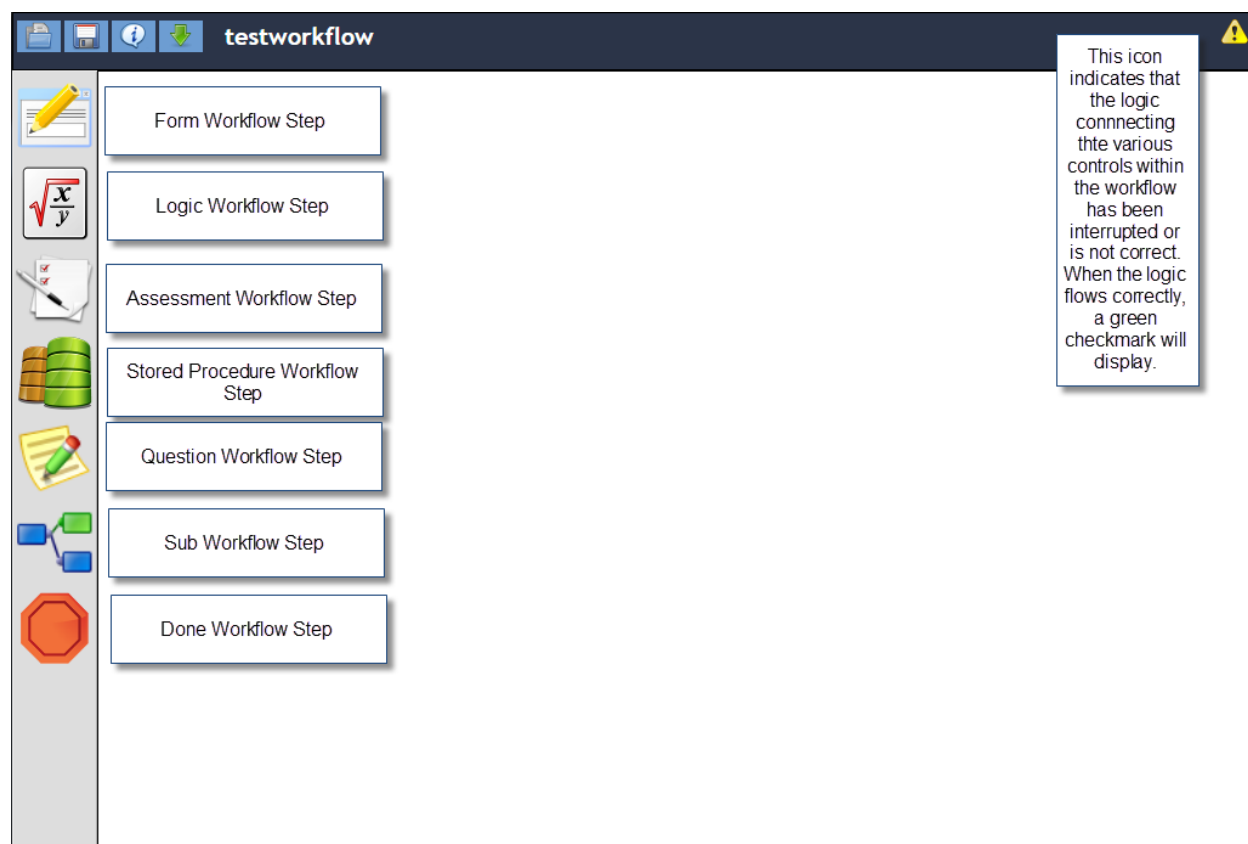
Assessment Workflow Step– This control automatically triggers required assessments linked to the specific program that is referenced in the workflow. There is no need to link assessments as forms within the workflow, the system automates this step based on program assessment set up. For more information 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.

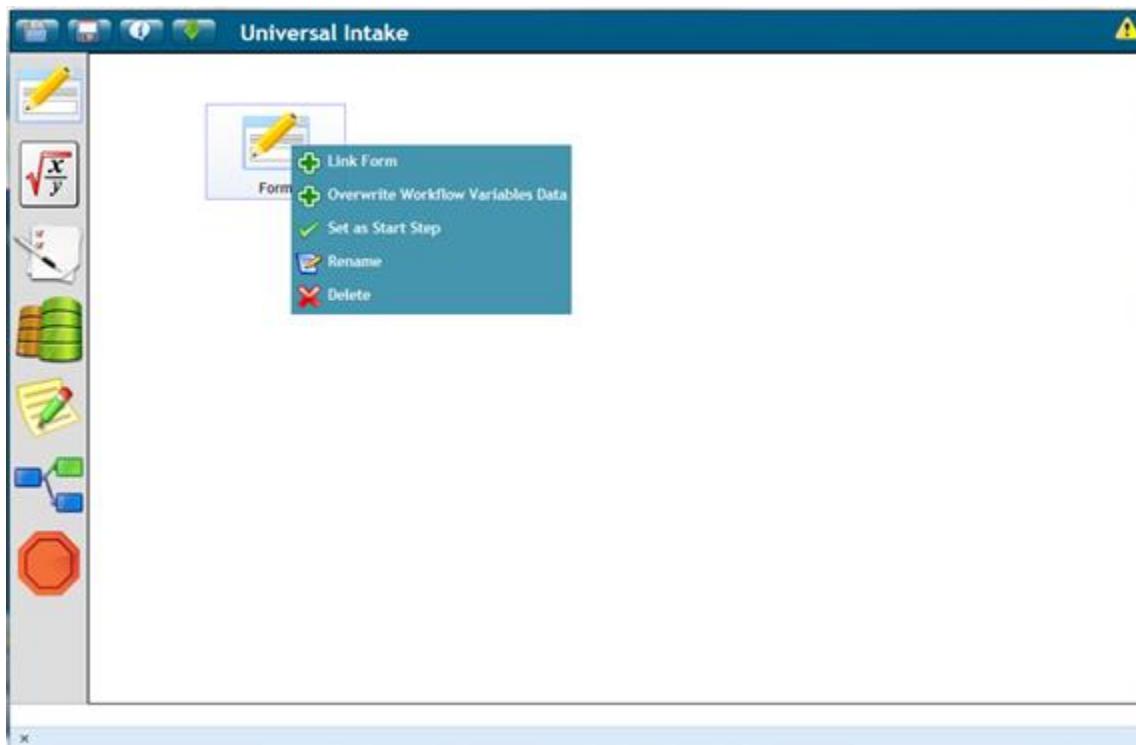
Question Workflow Step – this control allows the system administrator to insert a question within the workflow and drive the next step in the process based on the user’s response.

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.

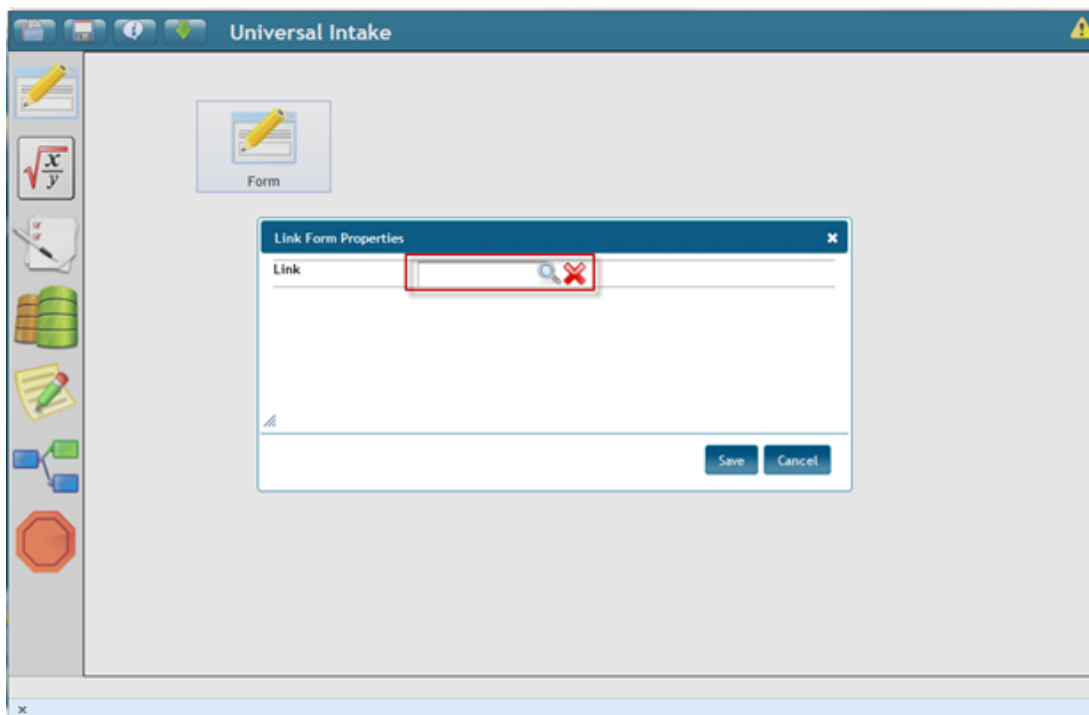
Done Workflow Step – this control must always be the final step, signaling the end of the workflow.




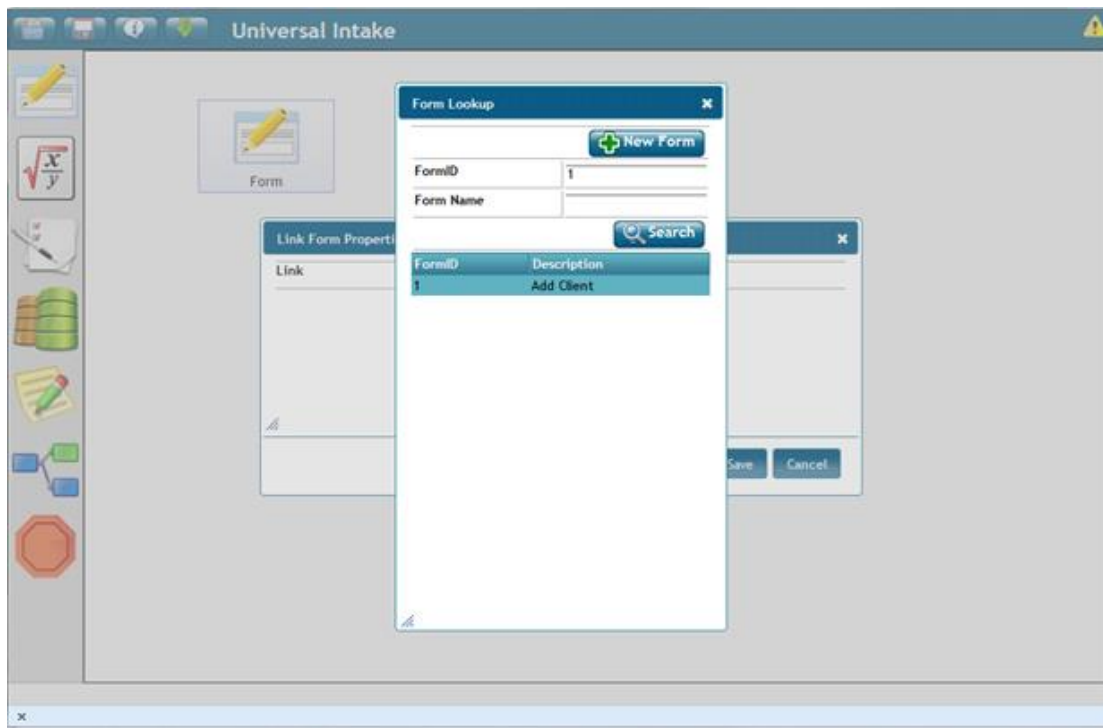
To begin designing the workflow, drag and drop the desired control to the workspace. Once the control is placed in the workspace, click the icon to access the options menu. Be sure to click the “Set as Start Step” on the first step of the workflow.



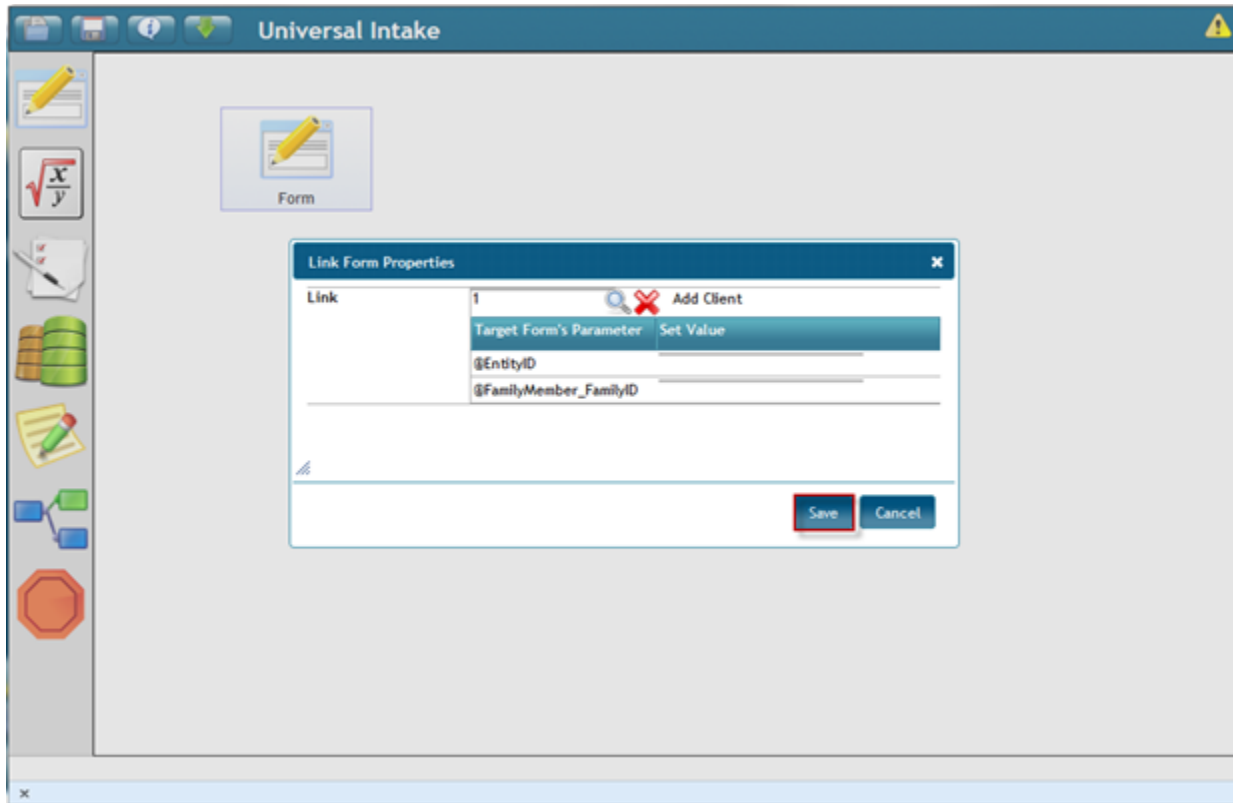
Forms are inserted into the workflow using the Workflow Forms Control. From the form control menu, select “Link Form”. Use the look-up field to search for and select the desired form.



Enter either the Form ID number or Form Name to narrow the search, then click the  **Search** button. Click on the desired search result.

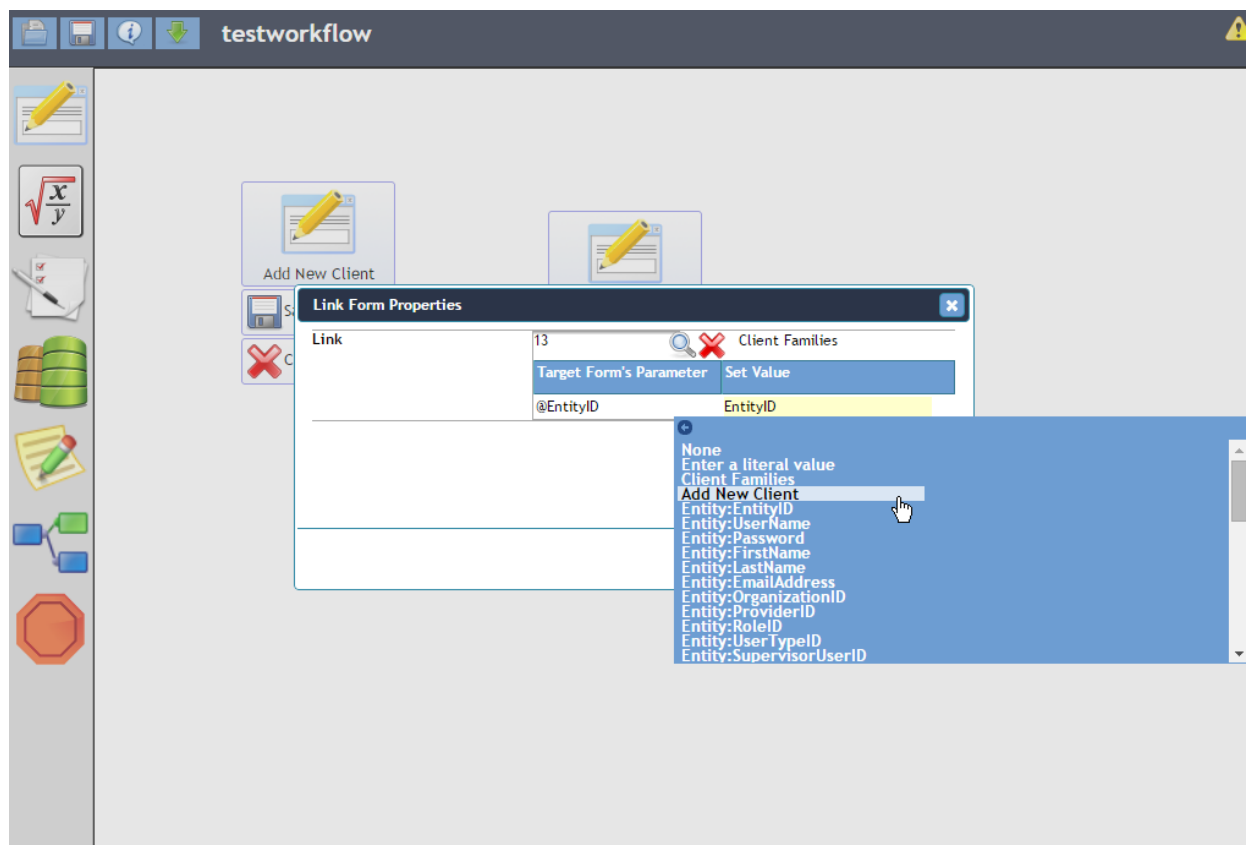


Once the form is selected, it displays on the Link Form Properties pop-up. One of the keys to a properly functioning workflow is to have data carry from one form to the next. Any parameter associated with a form that contains data not generated by that form, needs to be linked from a previous form. Typically, 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.

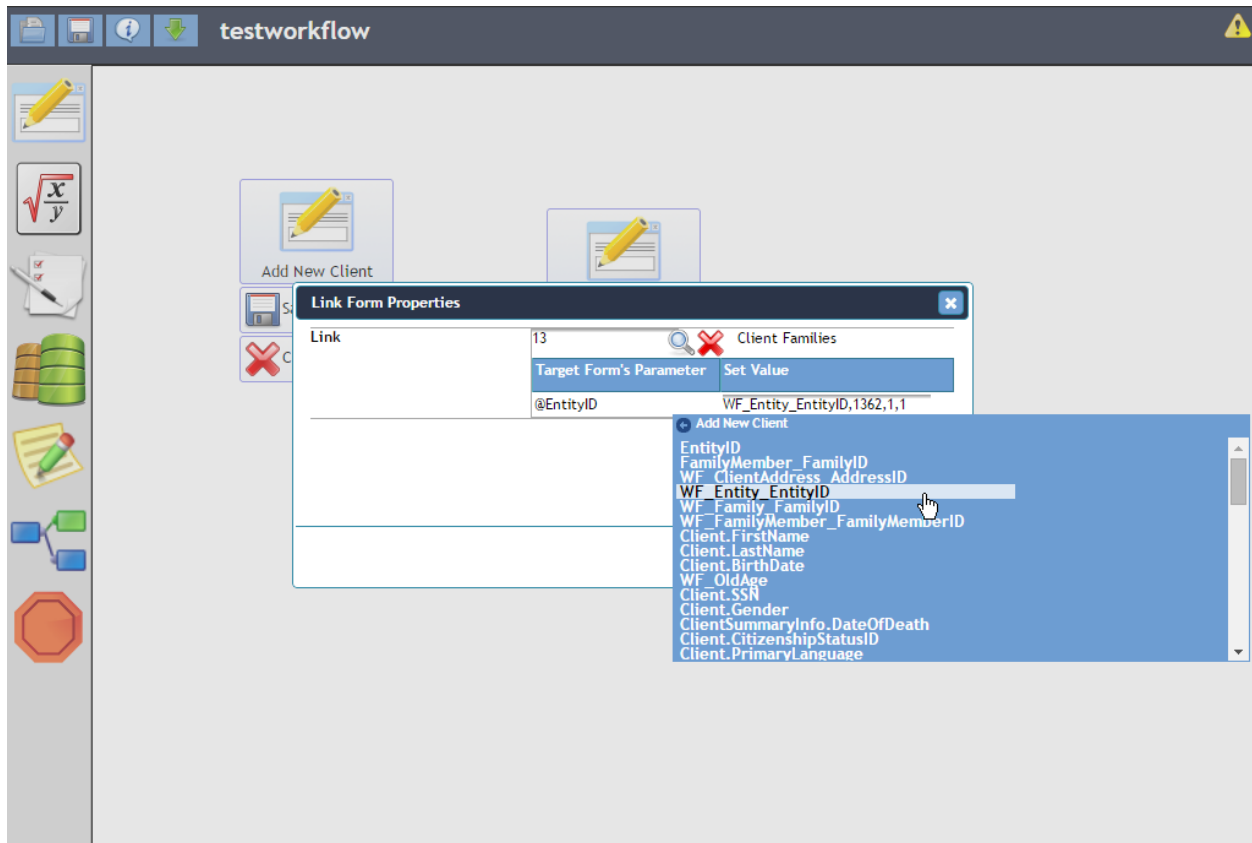


The workspace displays the name of the linked form in the Workflow Form Control and adds icons for each button that exists on the bottom of the form. As the workflow is built, the system administrator who is building it may use Workflow Connectors to link the buttons with the next step. This allows flexibility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

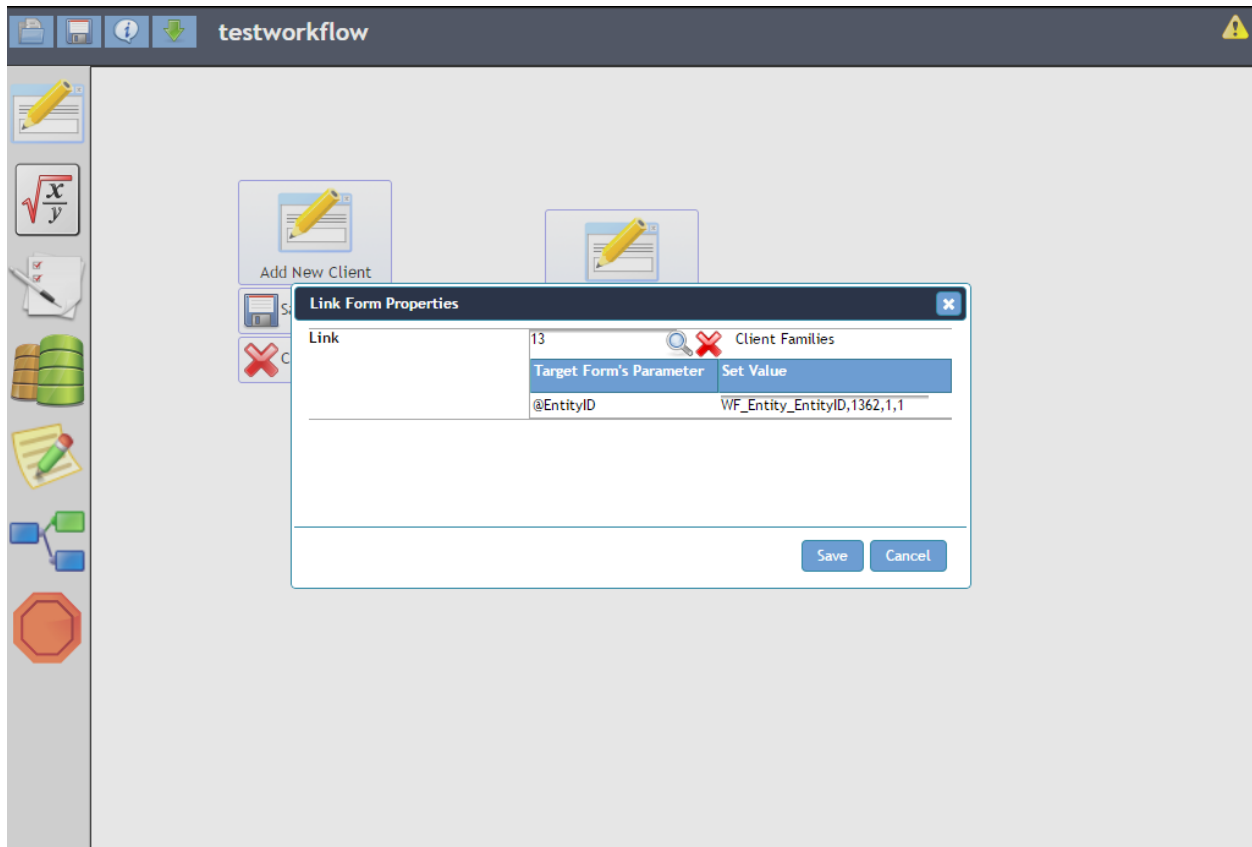
Next, choose the next workflow control and drag and drop it to the workspace. Repeat the steps above for a Workflow Form Control to search and select the next form. Once the form has been linked, the Link Form Properties pop-up displays and necessary parameters can be linked. In the example below, the 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.



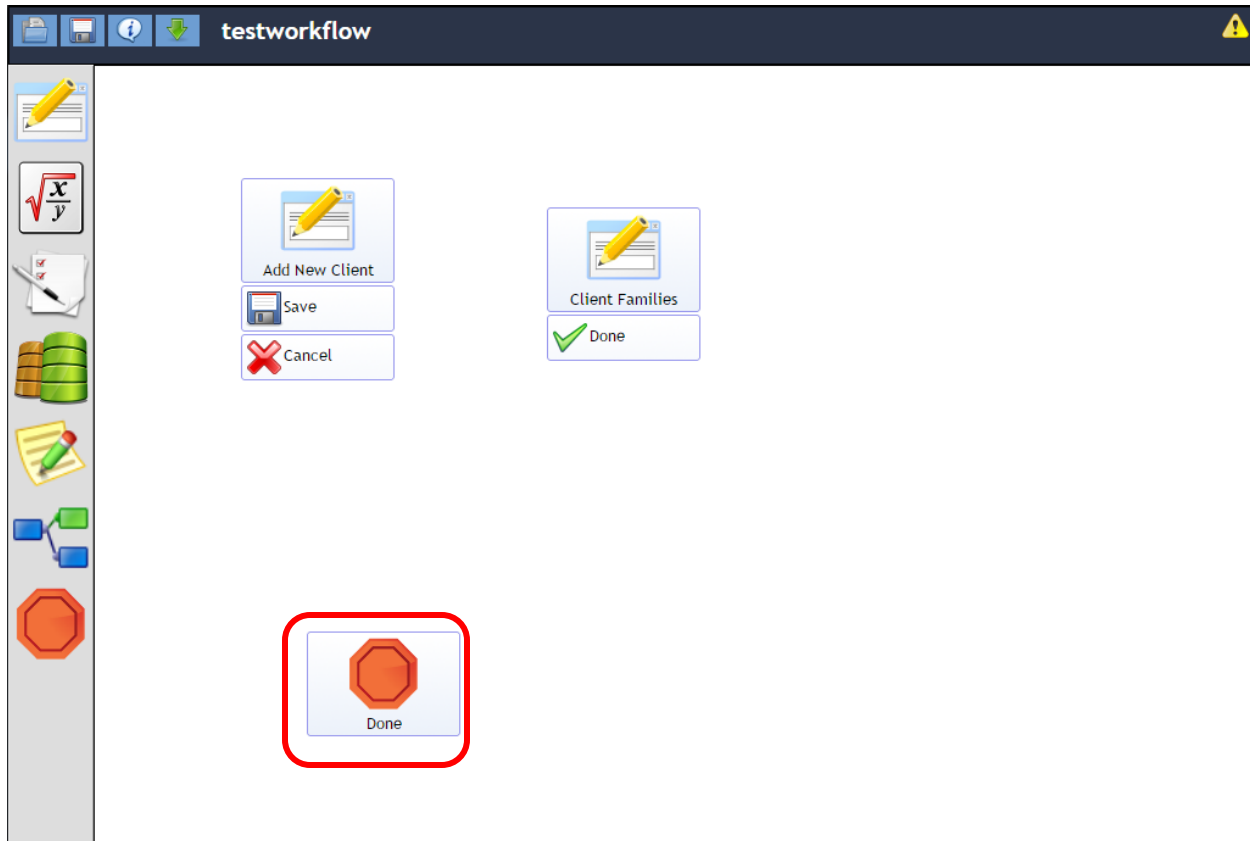
The list now displays all data columns associated with the Add Client form. The best practice is to choose the “WF” option when it is available. This helps to assure that the workflow only grabs the data that was generated within the workflow. In this example, choose “WF_Entity_EntityID”. Basically, 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.



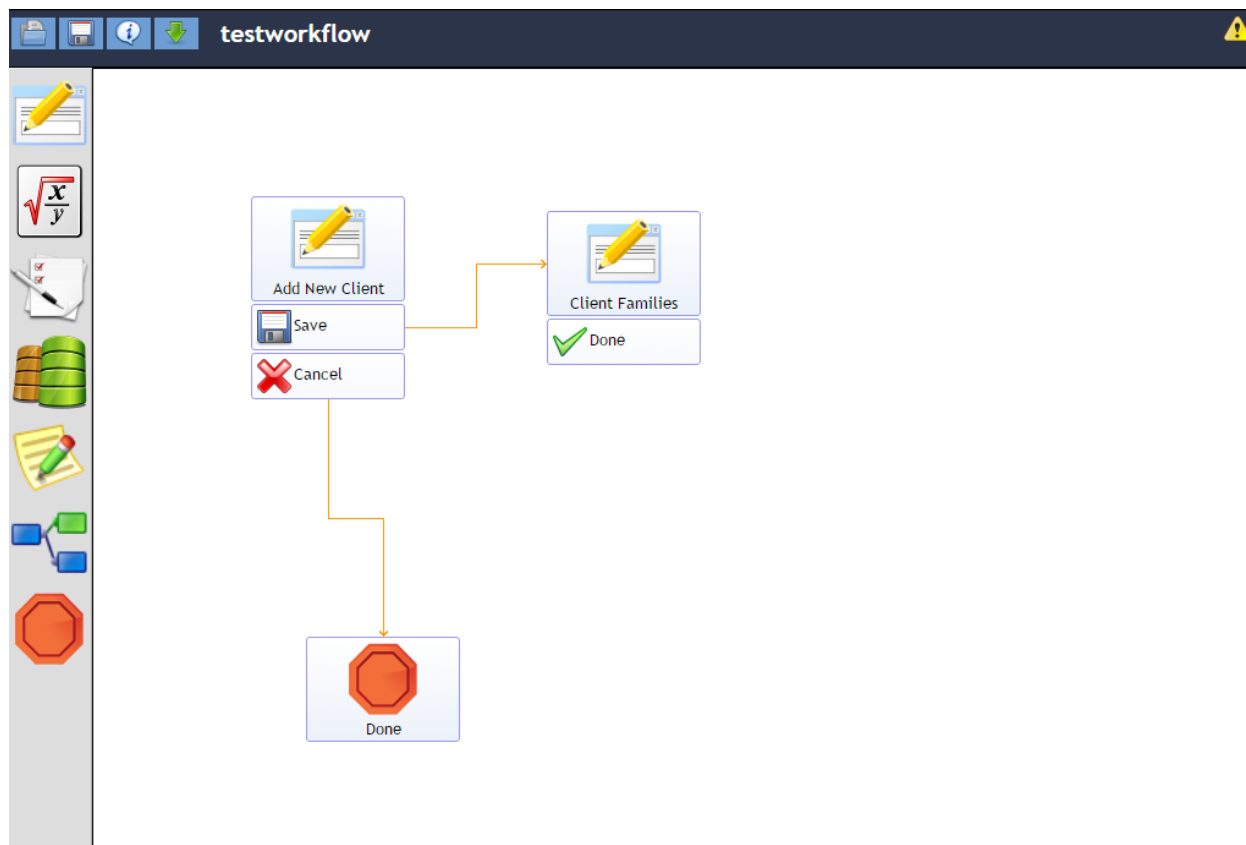
The Client Families form only uses the Entity ID parameter. Some forms have numerous parameters. The system administrator needs to have a basic understanding of the forms in the system, their purpose and how they handle data. As mentioned previously, data that is not generated by the current form **MUST** 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.



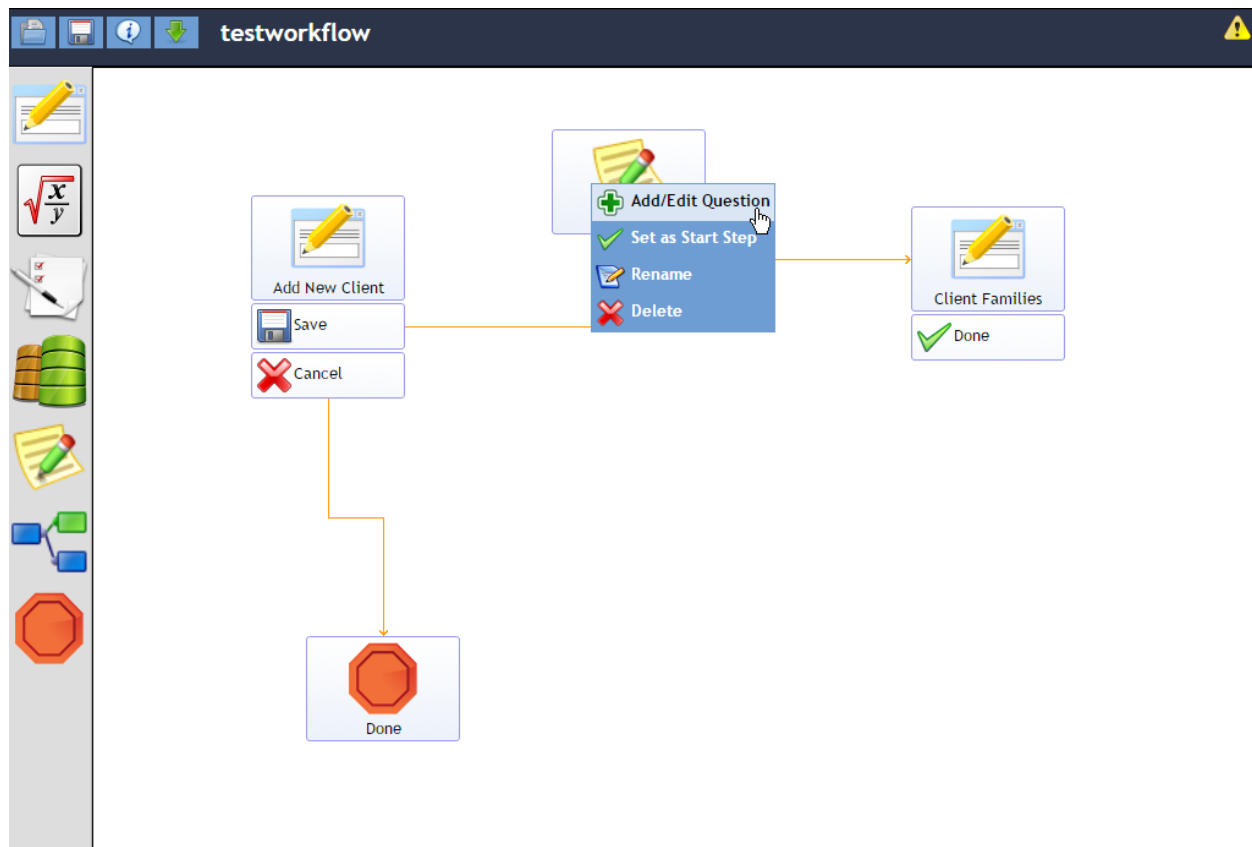
It is recommended to add the “Stop Workflow Control” early in the development of the workflow so that forms can be connected with each step of the workflow. Waiting to do all the linking at the end can lead to confusion and difficulty in resolving the logic flow. Add the Stop Workflow Control by dragging 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.



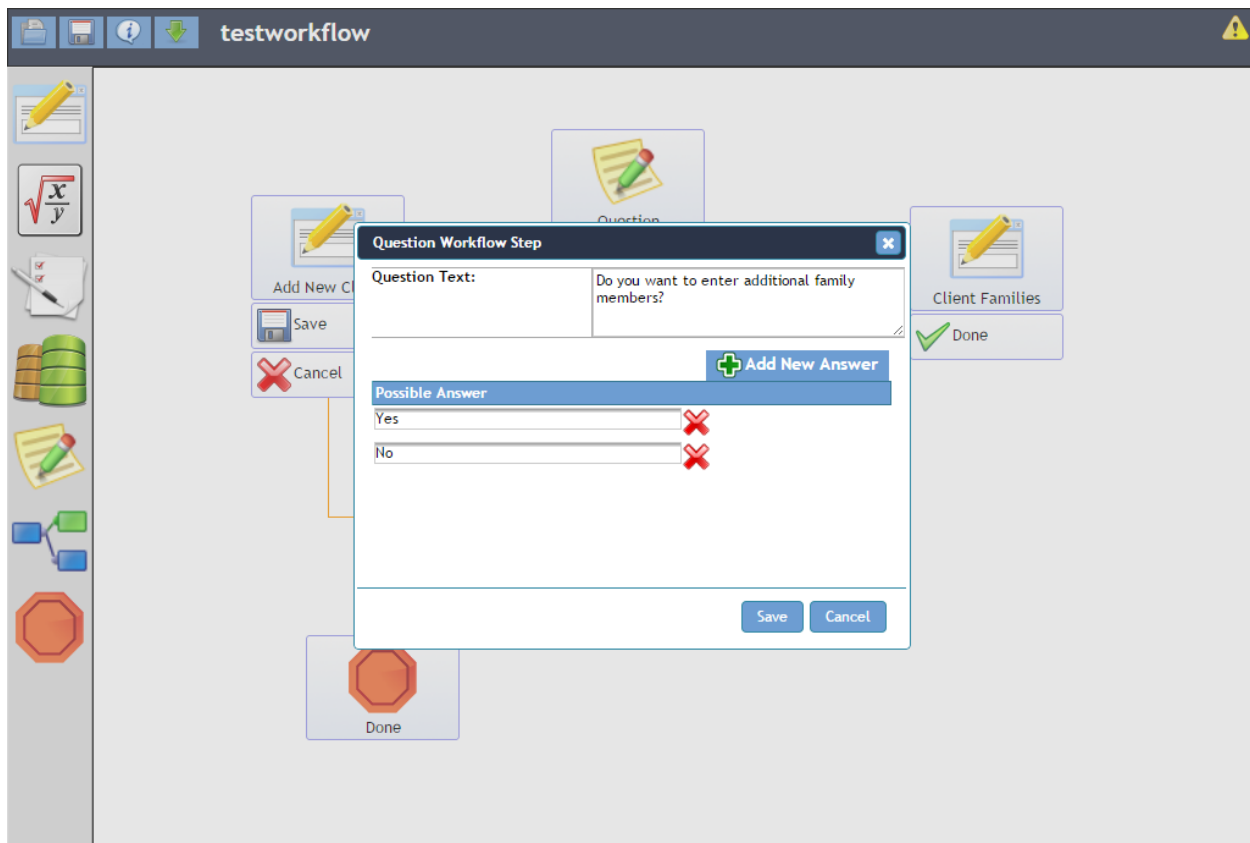
To link steps and create the logic of the flow, click and drag one of the tabs at the bottom of the workflow control to the name of the form or control that the flow should be directed to. In this example, once the Add Client form is saved, the flow carries the user to the Client Families form. If the 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.



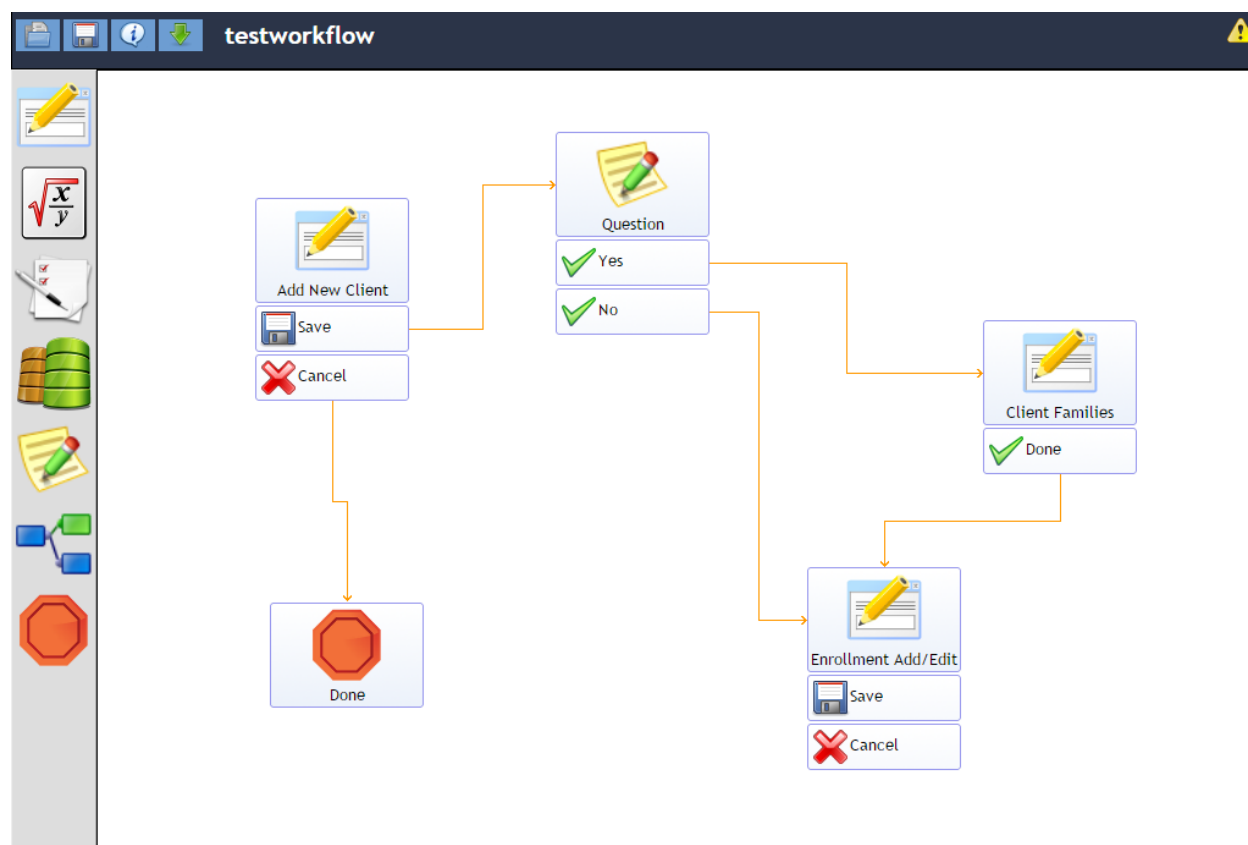
If there are no family members to add, the option to go directly to enrolling the client in the program needs to be available. The Workflow Question Control provides the logic that directs the flow of the process. To set up the Workflow Question Control, drag and drop it onto the workspace. To establish 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”.



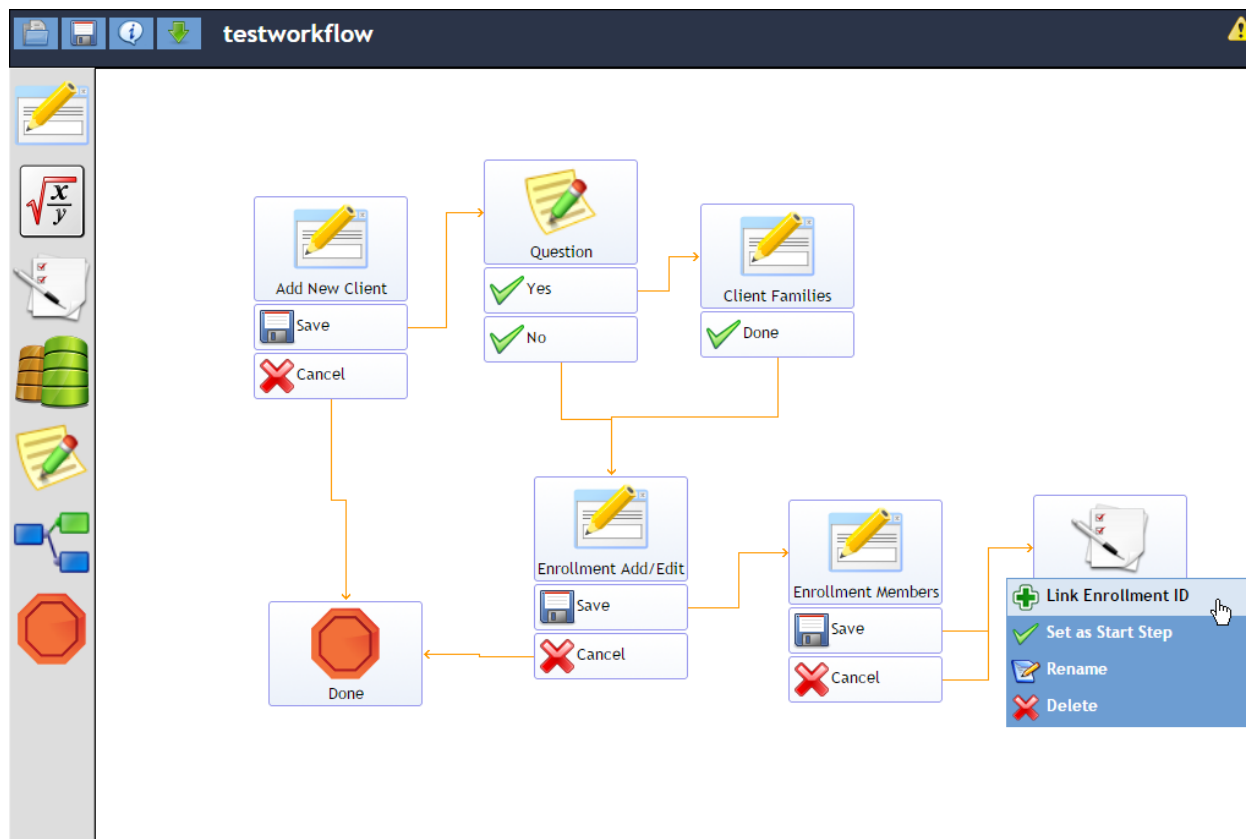
In the Question text box, type in the desired content. Click the “Add New Answer” button to create response options. Type in the desired response text. Click [Save](#) when finished.



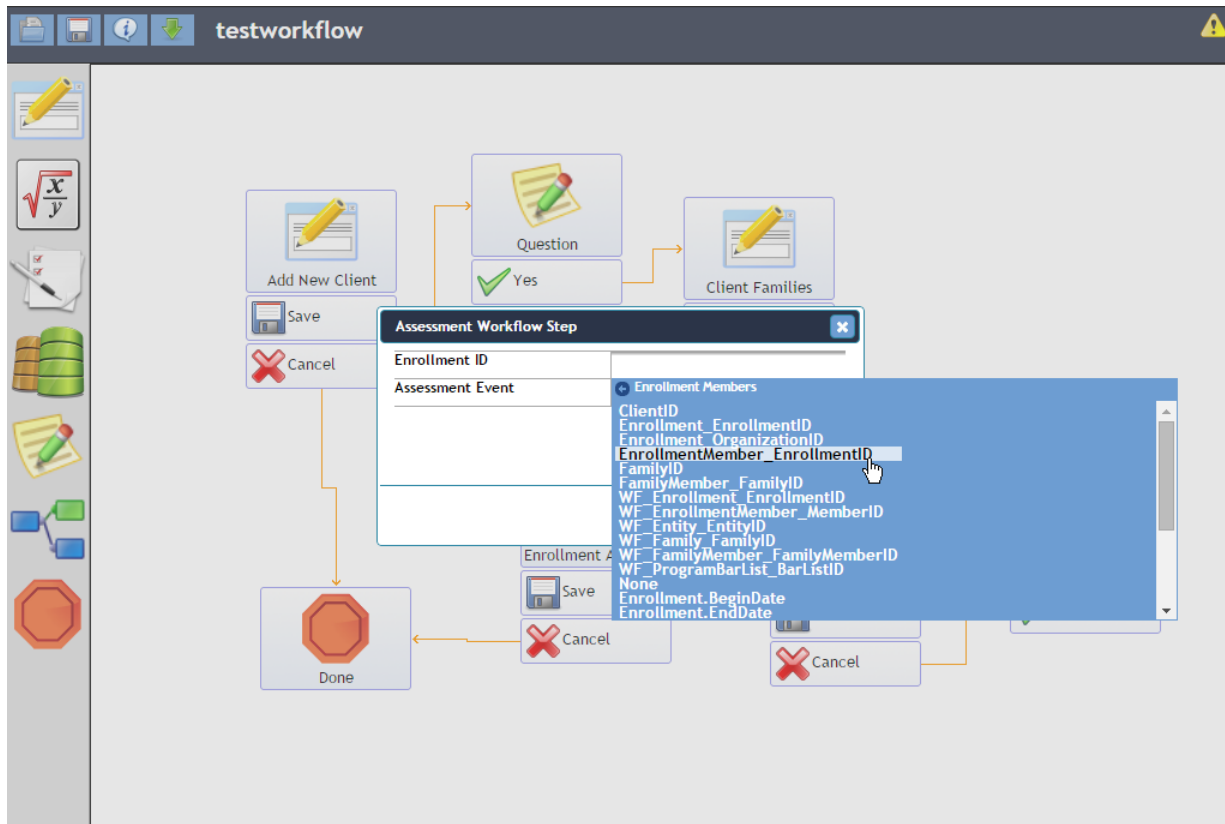
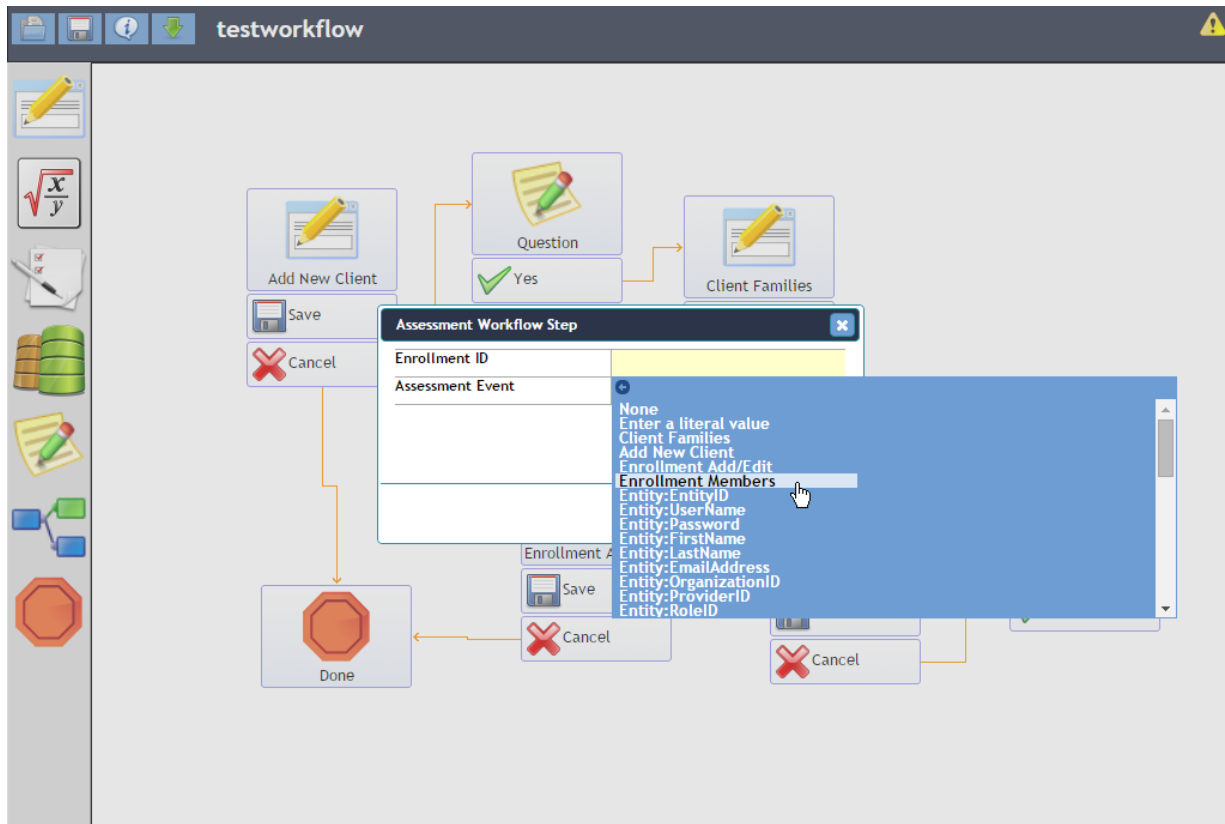
The Workflow Question Control displays with a tab for each entered response option. Click on each tab and drag it to the next workflow step that should occur based on that response.

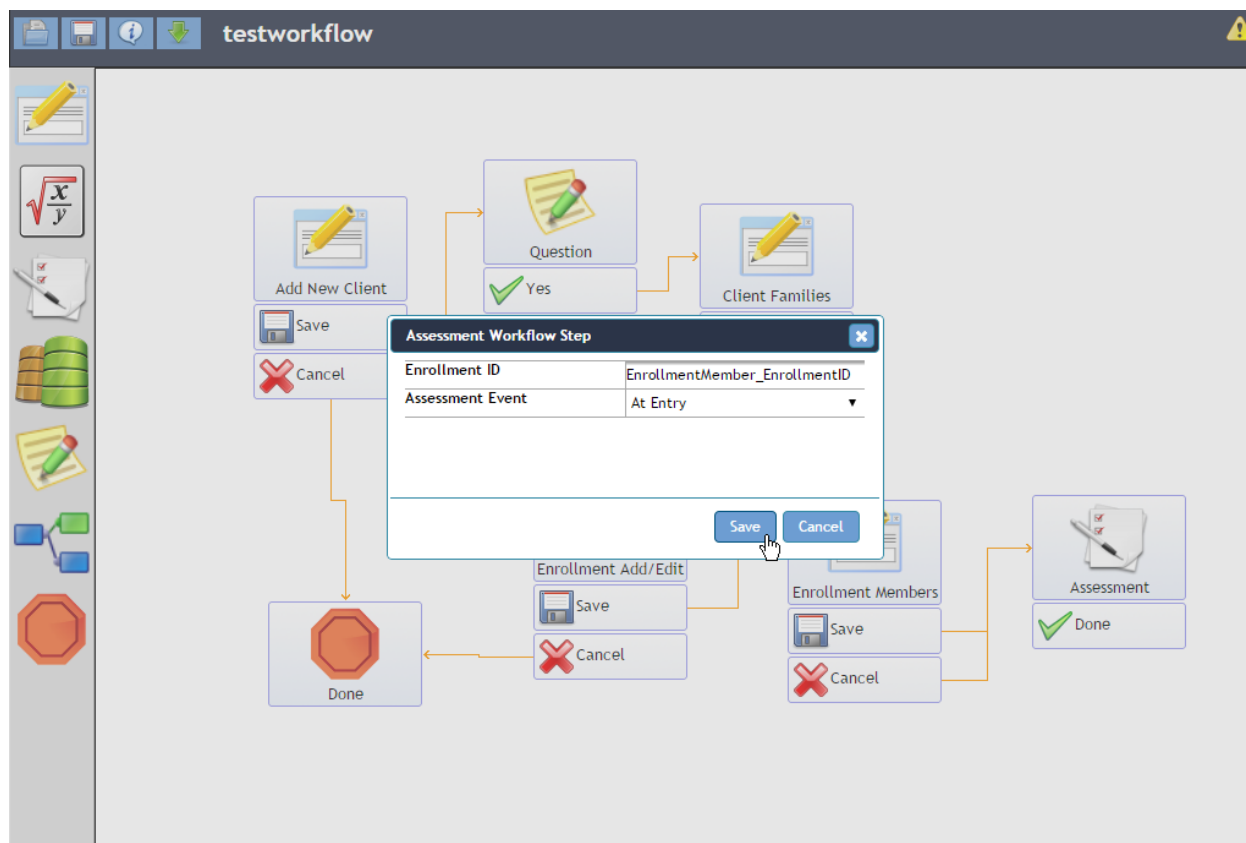


If the workflow is used by any programs that require “Entry” assessments, the Workflow Assessment Control needs to be included in the workflow at some point past the Enrollment Add/Edit or Enrollment Members form. It is typically recommended to place it immediately following the enrollment form if family 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”.

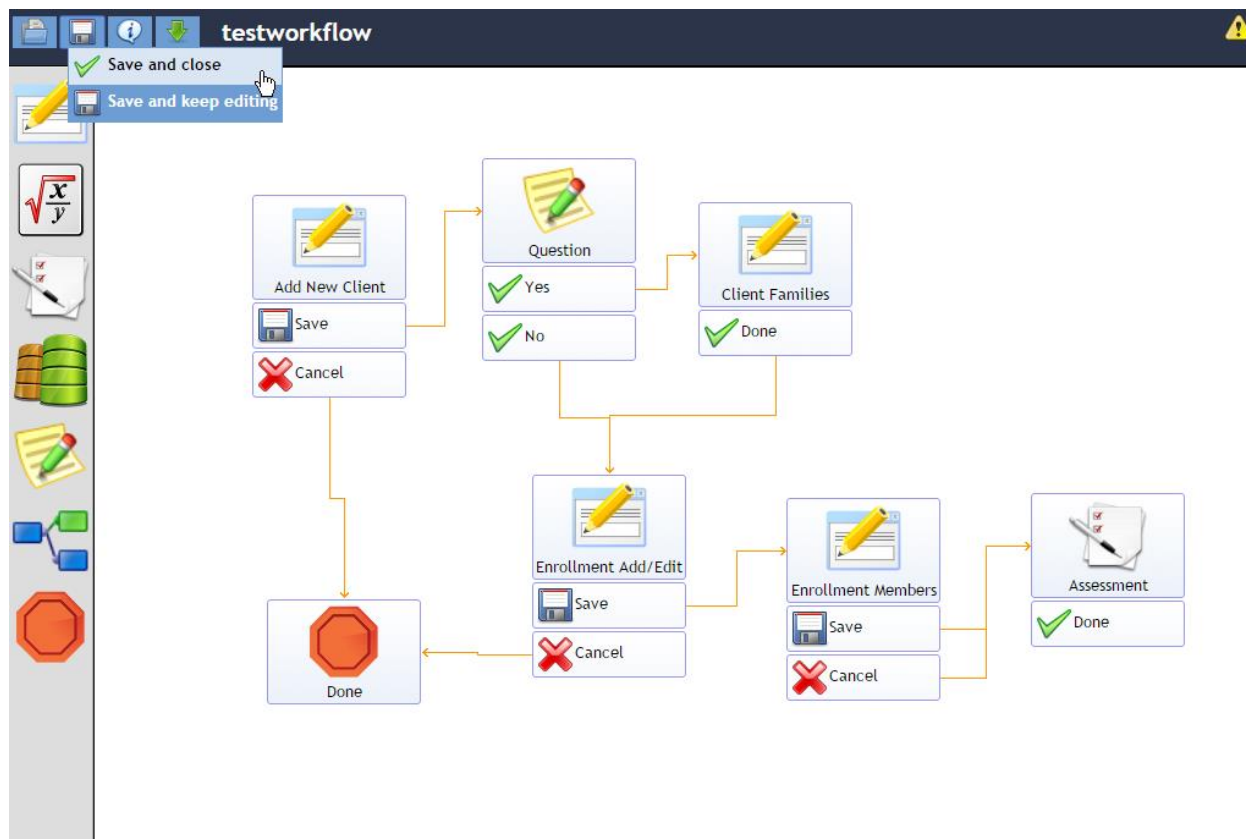


If only the HOH is enrolled in the program, the Enrollment ID is linked from the enrollment form. If family members are enrolled, the Enrollment ID is linked from the Enrollment Members form. Click on the empty field to the right of "Enrollment ID" and click on the appropriate form in the list. When 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](#).





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”.



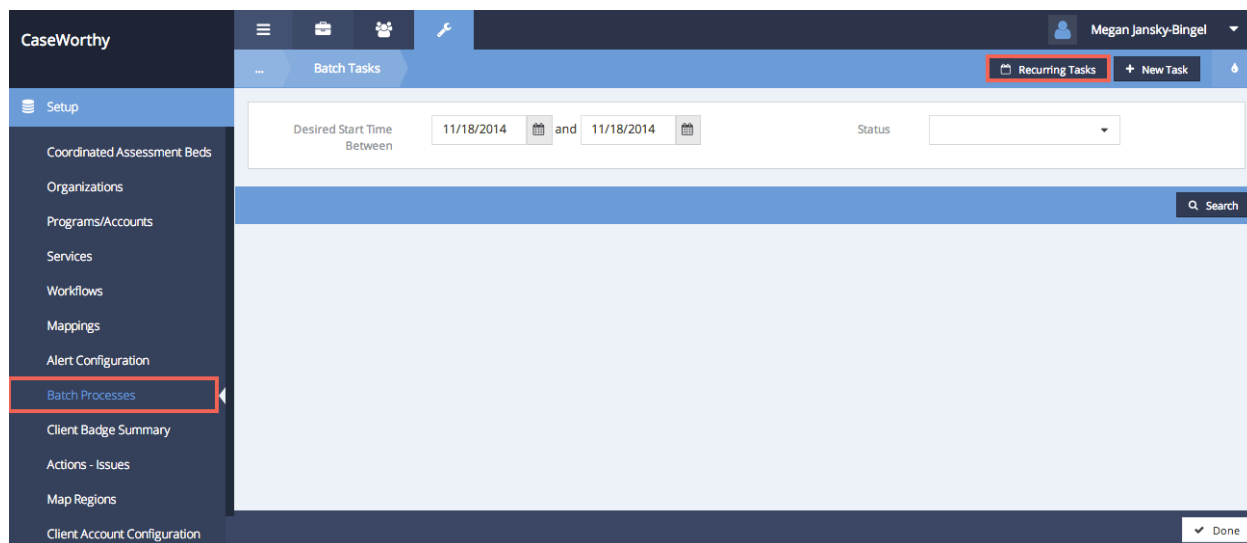
Once the workflow has been created, link it up to the desired menu or button (See the CaseWorthy™ apBuilder™ Guide for more information on linking workflows to menus/buttons) and run it to test it out. If parameters have not been linked correctly errors appear during the workflow. If this occurs, return 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

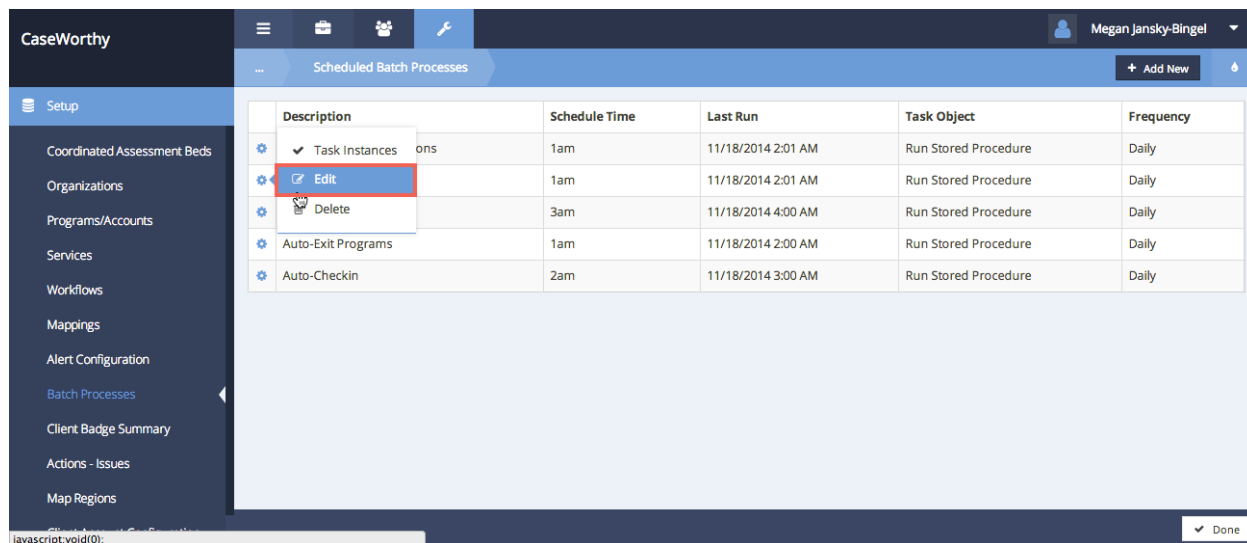
(Administration>Setup>Batch Processes)


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.

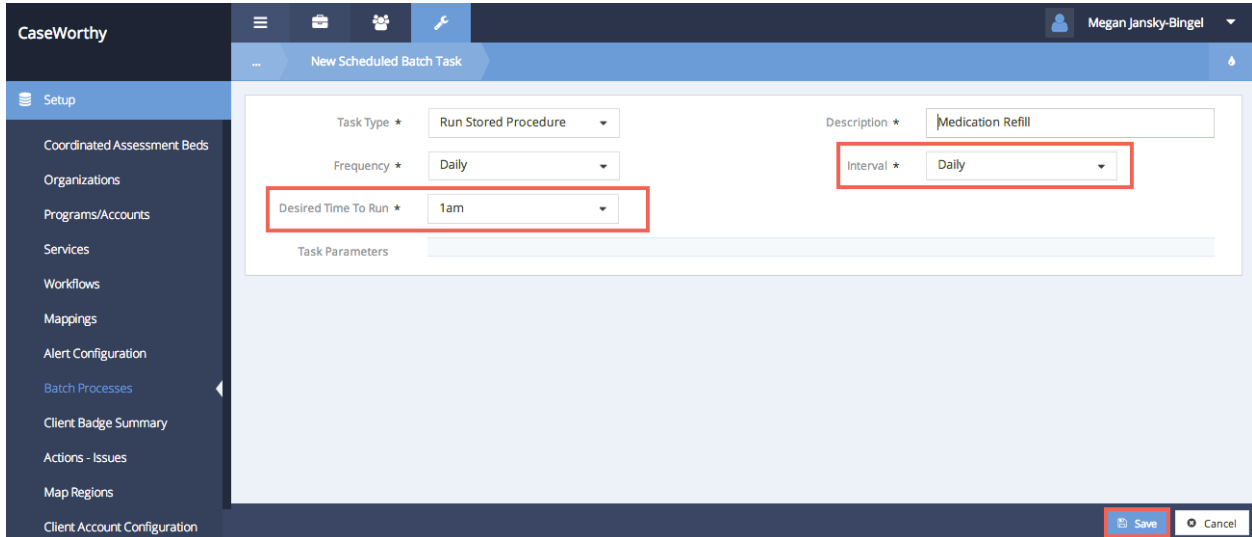
To view current tasks and their schedule, click on the “Recurring Tasks” button on the top right side of the Batch Tasks summary form.



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.



CaseWorthy

Megan Jansky-Bingel

New Scheduled Batch Task

Task Type * Run Stored Procedure

Description * Medication Refill


Frequency * Daily

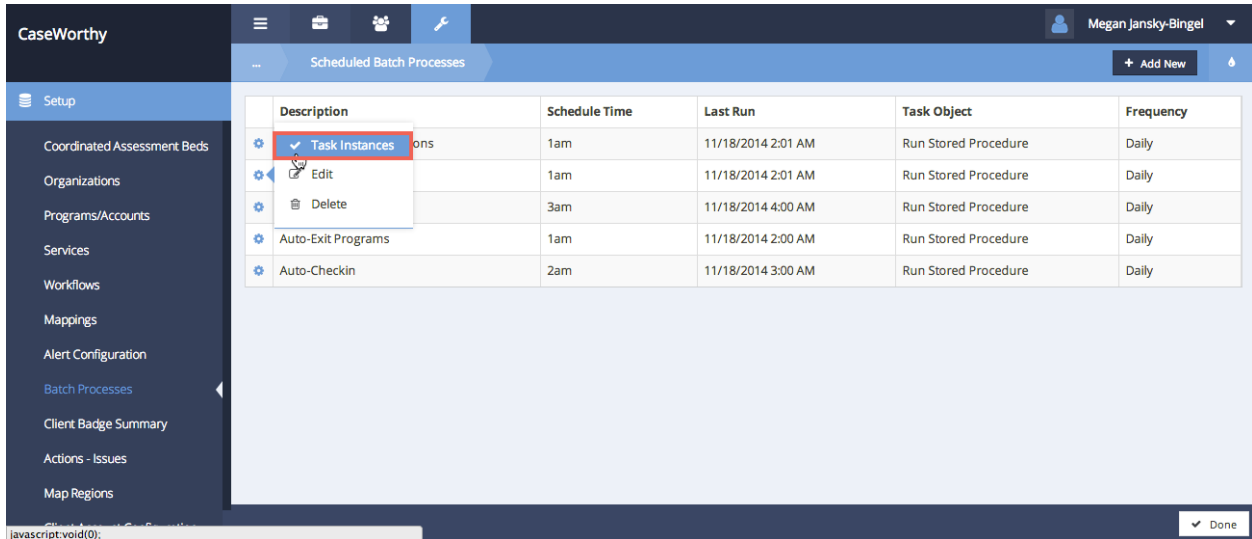
Interval * Daily

Desired Time To Run * 1am

Task Parameters

Save Cancel

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”.








CaseWorthy

Megan Jansky-Bingel

Scheduled Batch Processes

+ Add New

Description	Schedule Time	Last Run	Task Object	Frequency
 Task Instances	1am	11/18/2014 2:01 AM	Run Stored Procedure	Daily
 Edit	1am	11/18/2014 2:01 AM	Run Stored Procedure	Daily
 Delete	3am	11/18/2014 4:00 AM	Run Stored Procedure	Daily
 Auto-Exit Programs	1am	11/18/2014 2:00 AM	Run Stored Procedure	Daily
 Auto-Checkin	2am	11/18/2014 3:00 AM	Run Stored Procedure	Daily

Done

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

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

Description	Alert Type	Is Summary	Frequency Type	Start Date
Auto Case Manager notification on closed enrollments	Follow Ups by User	Yes	Days	6/1/2014
Jane Test	Service Request Approvals by Team	Yes	Once	4/7/2014
Service Request Pending	Service Request Approvals by Team	Yes	Hours	4/9/2013
Test Configuration Alert	Follow Ups by User	Yes	Once	3/1/2013
Email Case Managers when Service Plan Target dates are more than 5 days overdue	Enrollment Service Plan by Case Manager	Yes	Hours	1/15/2013
Email Case Manager Hourly when Goal Due Date is more than 5 Days past due	Client Goals by Case Manager	Yes	Hours	1/15/2013
Client Incident Email	Client Incidents by Case Manager	Yes	Once	1/14/2013

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.

Description	Alert Type	Is Summary	Frequency Type	Start Date
Auto Case Manager notification on closed enrollments	Follow Ups by User	Yes	Days	6/1/2014
Jane Test	Service Request Approvals by Team	Yes	Once	4/7/2014
Service Request Pending	Service Request Approvals by Team	Yes	Hours	4/9/2013
Test Configuration Alert	Follow Ups by User	Yes	Once	3/1/2013
Email Case Managers when Service Plan Target dates are more than 5 days overdue	Enrollment Service Plan by Case Manager	Yes	Hours	1/15/2013
Email Case Manager Hourly when Goal Due Date is more than 5 Days past due	Client Goals by Case Manager	Yes	Hours	1/15/2013
Client Incident Email	Client Incidents by Case Manager	Yes	Once	1/14/2013

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.

Alert Configuration

Description

Alert Type

Alert Action

Parameter Map

Alert Frequency and Scheduling Information

Frequency Type

Frequency


Start Date

Start Time

End Date

Disable Alert











☒ Disabled ☐


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

Alert Configuration Summary + Add New

Alert Type

Total Rows: 7 Search

	Alert Type	Is Summary	Frequency Type	Start Date
  Edit	Notification on closed enrollments			
  Delete	Follow Ups by User	Yes	Days	6/1/2014
	Service Request Approvals by Team	Yes	Once	4/7/2014
	Service Request Pending	Yes	Hours	4/9/2013
	Test Configuration Alert	Yes	Once	3/1/2013
	Email Case Managers when Service Plan Target dates are more than 5 days overdue	Yes	Hours	1/15/2013
	Email Case Manager Hourly when Goal Due Date is more than 5 Days past due	Yes	Hours	1/15/2013
	Client Incident Email	Yes	Once	1/14/2013

Make any changes and click  Save when done.

Alert Configuration

Description

Alert Type

Rule

Alert Action

Template

Parameter Map

☒ Summary ☒

Alert Frequency and Scheduling Information

Frequency Type

Start Date

Start Time

Disable Alert

☒ Disabled ☐

Client Badge Summary

(Administration>Setup>Client Badge Summary)

CaseWorthy

Client Badge Summary

Adrian Elason

+ Add New

Total Rows: 4

Template Name	Default	Single Side Template
Scan Card Male	No	No
Scan Card Female	No	No
Scan Card Standard	No	Yes
User Default	No	No

Done

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

Client Badge Summary

+ Add New

Total Rows: 4

Template Name	Default	Single Side Template
Scan Card Male	No	No
Scan Card Female	No	No
Scan Card Standard	No	Yes
User Default	No	No

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.

Create Client Badge

Badge Template Name

Format: Paragraph Font Family Font Sizes


Is Default ☐





Is Single Side Template ☐

Sort Order

Words: 0

Save Cancel

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

Client Badge Summary				+ Add New
Total Rows: 4				
Template Name		Default	Single Side Template	
 Edit		No	No	
 Scan Card Female		No	No	
 Scan Card Standard		No	Yes	
 User Default		No	No	


Make any changes and click [Save](#) when done.

Create Client Badge		+ Add New
Badge Template Name	<input type="text" value="Scan Card Male"/>	
Is Default	<input type="checkbox"/>	
Is Single Side Template	<input type="checkbox"/>	
Sort Order	<input type="text" value="2"/>	
		Save Cancel

Actions – Issues

(Administration>Setup>Actions – Issues)

CaseWorthy							
Action - Issues							
Total Rows: 445							
Created Date	Entity Name	Source Context Type	Source Context ID	Target Context Type	Target Context ID	Entity ID	
1/19/2015	Jane530, Test	16	0	5	1344	3696	
1/19/2015	Jane530, Test	16	0	5	1343	3696	
1/19/2015	Jane530, Test	16	0	5	1342	3696	
1/19/2015	Test, Jane121	16	0	5	1341	6771	
1/19/2015	Test, Jane51	16	0	5	1340	3692	
1/19/2015	Test, Jane51	16	0	5	1339	3692	
1/19/2015	Test, Jane121	16	0	5	1338	6771	
1/19/2015	Test, Jane121	16	0	5	1337	6771	
1/19/2015	Test, Jane121	16	0	5	1336	6771	
1/19/2015	Test, Jane121	16	0	5	1335	6771	
1/19/2015	Test, Jane121	16	0	5	1334	6771	
1/19/2015	Test, Jane121	16	0	5	1333	6771	
1/19/2015	Test, Jane121	16	0	5	1332	6771	
1/19/2015	Test, Jane121	16	0	5	1331	6771	
1/19/2015	Test, Jane121	16	0	5	1330	6771	
1/15/2015	Draper, Sally	16	2111	5	1329	4404	
1/15/2015	Draper, Sally	16	2047	5	1329	4404	
1/15/2015	Draper, Sally	16	2036	5	1329	4404	

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

... Action - Issues							
Total Rows: 445							
	Created Date	Entity Name	Source Context Type	Source Context ID	Target Context Type	Target Context ID	Entity ID
	1/19/2015	Jane530, Test	16	0	5	1344	3696
	1/19/2015	Jane530, Test	16	0	5	1343	3696
	1/19/2015	Jane530, Test	16	0	5	1342	3696
Delete	1/19/2015	Test, Jane121	16	0	5	1341	6771
	1/19/2015	Test, Jane51	16	0	5	1340	3692
	1/19/2015	Test, Jane51	16	0	5	1339	3692
	1/19/2015	Test, Jane121	16	0	5	1338	6771
	1/19/2015	Test, Jane121	16	0	5	1337	6771
	1/19/2015	Test, Jane121	16	0	5	1336	6771

Client Account Configuration

(Administration>Setup>Client Account Configuration)

CaseWorthy

Setup

Organizations

Programs/Accounts

Services

Workflows

Mappings

Alert Configuration

Batch Processes

Client Badge Summary

Actions - Issues

Map Regions

Client Account Configuration

Portal Default

Administration

Codes and Categories

Reporting

Adrian Eliason

...

Client Account Configuration

Add Row

Total Rows: 7

	List Type	List Transaction Type	Loan Amount	Current Balance	Cash Match	Principle	Interest	Late Fees	
<input checked="" type="checkbox"/>	1	Deposits (Additional Funds)		++					
<input checked="" type="checkbox"/>	13	Deposits (Adjustment)		++					
<input checked="" type="checkbox"/>	14	Misc (Adjustment)		++					
<input checked="" type="checkbox"/>	71	Cash Match (Organization / Provider)		++	++				
<input checked="" type="checkbox"/>	70	Client Loans / Mortgage	++	++					
<input checked="" type="checkbox"/>	28	Client Service				++			
<input checked="" type="checkbox"/>	50	Client Payment		---		---			

Save

Cancel

Click to add a row. Select settings from the drop-down lists. Click when done.

...

Client Account Configuration

+

Add Row

Total Rows: 7

	List Type	List Transaction Type	Loan Amount	Current Balance	Cash Match	Principle	Interest	Late Fees	
<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	1	Deposits (Additional Funds)		++					
<input checked="" type="checkbox"/>	13	Deposits (Adjustment)		++					
<input checked="" type="checkbox"/>	14	Misc (Adjustment)		++					
<input checked="" type="checkbox"/>	71	Cash Match (Organization / Provider)		++	++				
<input checked="" type="checkbox"/>	70	Client Loans / Mortgage	++	++					
<input checked="" type="checkbox"/>	28	Client Service				++			
<input checked="" type="checkbox"/>	50	Client Payment		---		---			

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 when done editing.

Client Account Configuration									
Total Rows: 7									
List Type	List Transaction Type	Loan Amount	Current Balance	Cash Match	Principle	Interest	Late Fees		
<input checked="" type="checkbox"/> 1	Deposits (Additional Funds)		++						
<input checked="" type="checkbox"/> 13	Deposits (Adjustment)		++						
<input checked="" type="checkbox"/> 14	Misc (Adjustment)		++						
<input checked="" type="checkbox"/> 71	Cash Match (Organization / Provider)		++	++					
<input checked="" type="checkbox"/> 70	Client Loans / Mortgage	++	++						
<input checked="" type="checkbox"/> 28	Client Service				++				
<input checked="" type="checkbox"/> 50	Client Payment		---		---				


Portal Default

(Administration>Setup>Portal Default)

Set Volunteer Defaults					
Description	Table Name	Column Name	Type	Provider ID	
<input checked="" type="checkbox"/> Donor	EntityContact	ParentEntityID	Provider	14	
<input checked="" type="checkbox"/> Volunteer	EntityContact	ParentEntityID	Provider	14	

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

Set Volunteer Defaults					
Description	Table Name	Column Name	Type	Provider ID	
<input checked="" type="checkbox"/>			Provider		
<input checked="" type="checkbox"/> Donor	EntityContact	ParentEntityID	Provider	14	
<input checked="" type="checkbox"/> Volunteer	EntityContact	ParentEntityID	Provider	14	

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.

Set Volunteer Defaults					
Description	Table Name	Column Name	Type	Provider ID	
<input checked="" type="checkbox"/> Donor	EntityContact	ParentEntityID	Provider	14	
<input checked="" type="checkbox"/> Volunteer	EntityContact	ParentEntityID	Provider	14	

Integration Processes

(Administration>Setup>Integration Processes)

Integration Processes + Add New						
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.

...

Upload Integration Excel File

Integration Type CCA - Law Logix

Excel File Browse

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)


Entity Duplicate Check Configuration								
Total Rows: 2								
Entity Type	Last Name	First Name	Birth Date	SSN	Zip Code	Phone	MI	Gender
Client	First two letters	First four letters	Partial Day/Year	Last 4 Digits	False	False	False	True
Users	First four letters	First four letters	Partial Month/Year	First 3 Digits	True	True	True	True

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

Entity Duplicate Check Configuration (Add)	
Entity Type *	
Birth Date	
First Name	
SSN	
Email	<input type="checkbox"/>
Gender	<input type="checkbox"/>
Zip Code Verification	<input type="checkbox"/>
Last Name	
MI	<input type="checkbox"/>
Phone (Cell or Home)	<input type="checkbox"/>

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.

Entity Duplicate Check Configuration								
Total Rows: 2								
Entity Type	Last Name	First Name	Birth Date	SSN	Zip Code	Phone	MI	Gender
 Edit	First two letters	First four letters	Partial Day/Year	Last 4 Digits	False	False	False	True
Users	First four letters	First four letters	Partial Month/Year	First 3 Digits	True	True	True	True

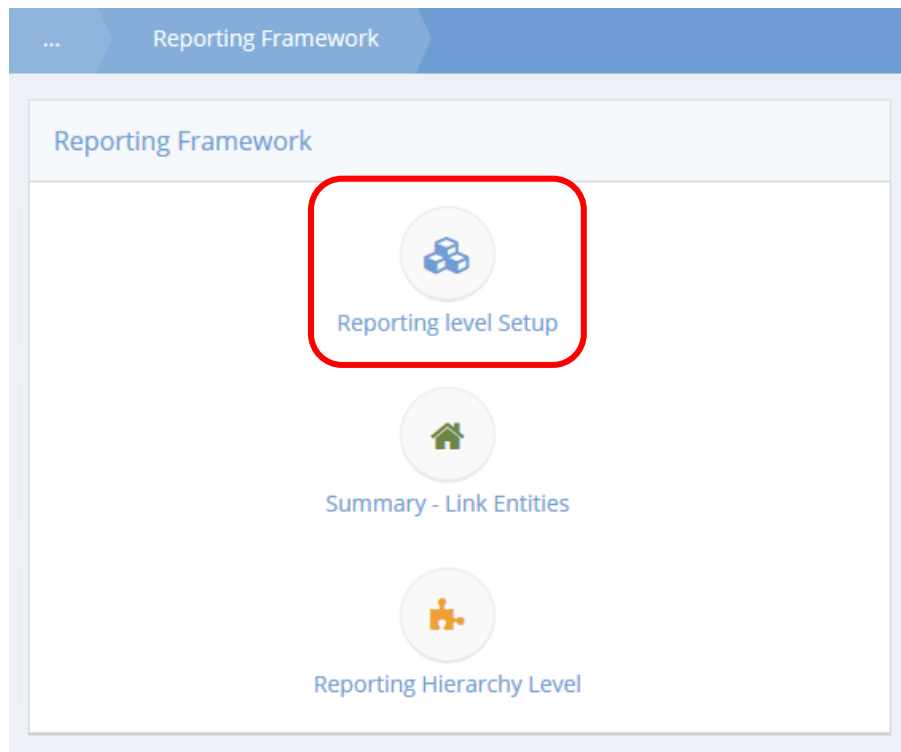
To edit an existing configuration, click the action gear  icon and click Edit. The Edit form is the same as the Add form shown above. Make any desired changes and click **Save** when finished.

Reporting Framework

Reporting Level Setup

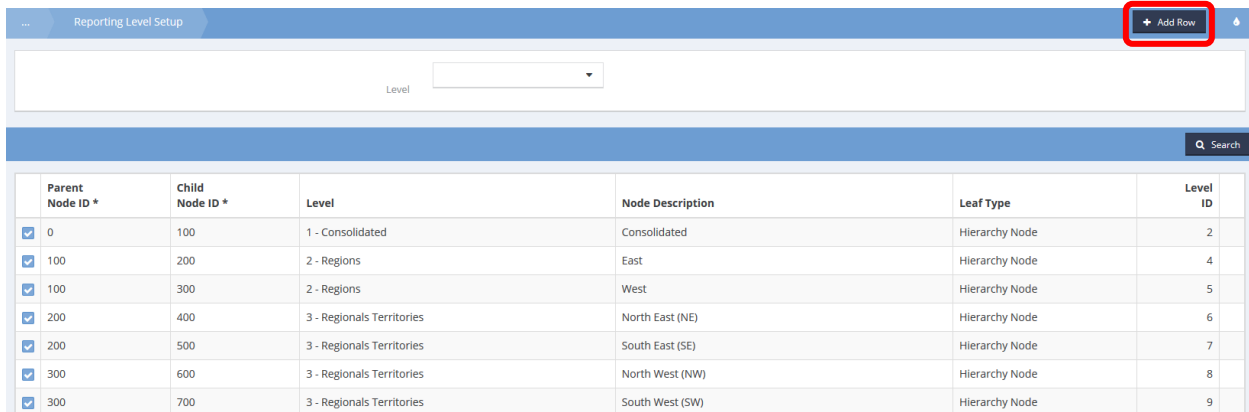
Objective: Access reporting level setup.

Navigation: Administration>Setup>Reporting Framework



Click the icon for Reporting Level Setup.

The Reporting Level Setup form displays.



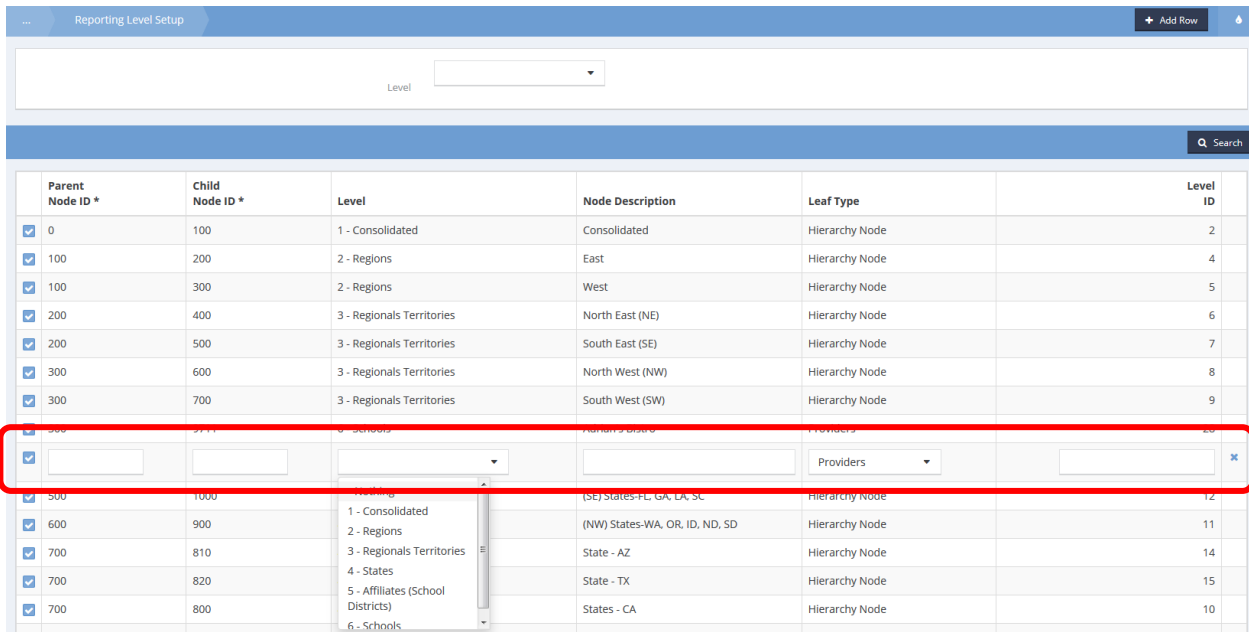
Reporting Level Setup

Level

Search

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.



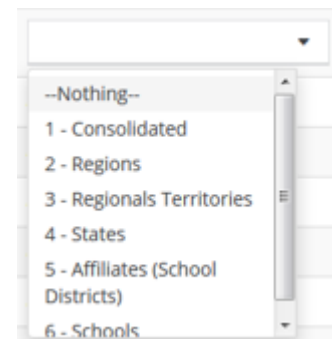
Reporting Level Setup

Level

Search

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	1 - Consolidated	(SE) States-FL, GA, LA, SC	Hierarchy Node	12
600	900	2 - Regions	(NW) States-WA, OR, ID, ND, SD	Hierarchy Node	11
700	810	3 - Regionals Territories	State - AZ	Hierarchy Node	14
700	820	4 - States	State - TX	Hierarchy Node	15
700	800	5 - Affiliates (School Districts)	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.



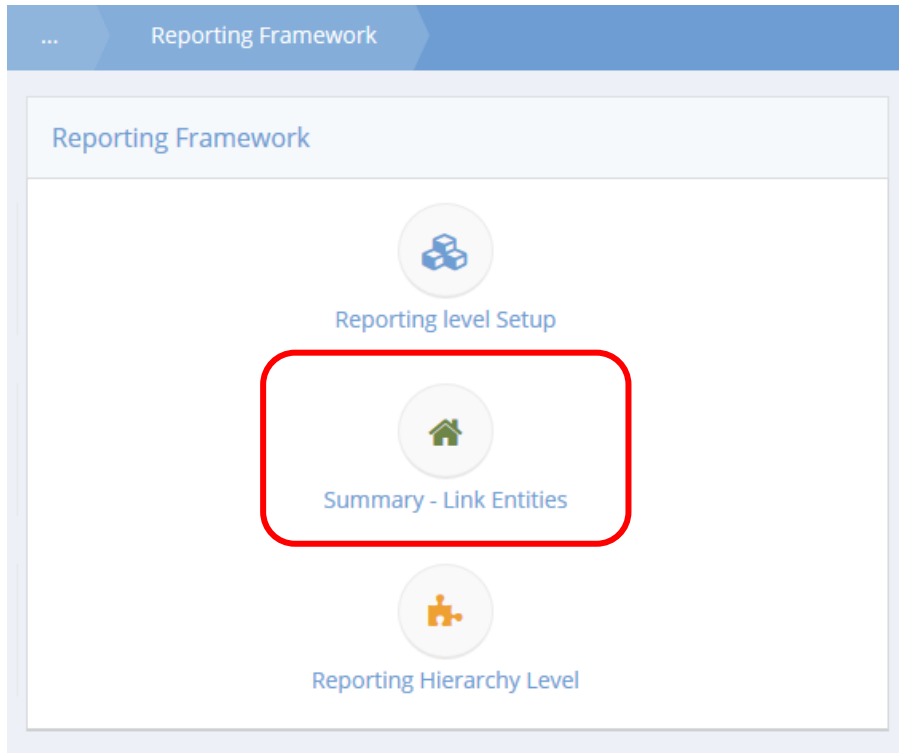
--Nothing--

- 1 - Consolidated
- 2 - Regions
- 3 - Regionals Territories
- 4 - States
- 5 - Affiliates (School Districts)
- 6 - Schools

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.

Reporting Level Setup								
Level		Leaf Type		Providers				
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	
<div> <div>⚙</div> <div> <div>Edit</div> <div>Schools</div> <div>Users</div> <div>Delete</div> </div> </div>		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.

Provider Name	City	State	Category	EntityID
45rtyhj			_ Not Assigned	2161
4r 876yt			_ Not Assigned	2166
Adrian's Bistro	Salt Lake City	UT	Employer	9711
Adrian's Bistro	Salt Lake City	UT	Provider	9711
Adrian's Bistro	Salt Lake City	UT	Donors	9711
Adrian's Bistro	Salt Lake City	UT	Client Created Business	9711
Appalachian Regional Coalition on Homelessness	Johnson City	TN	Customer	128
Apple Computers - Real	New York	NY	Employer	4029
Auto Zone	Salt Lake City	UT	Employer	4144

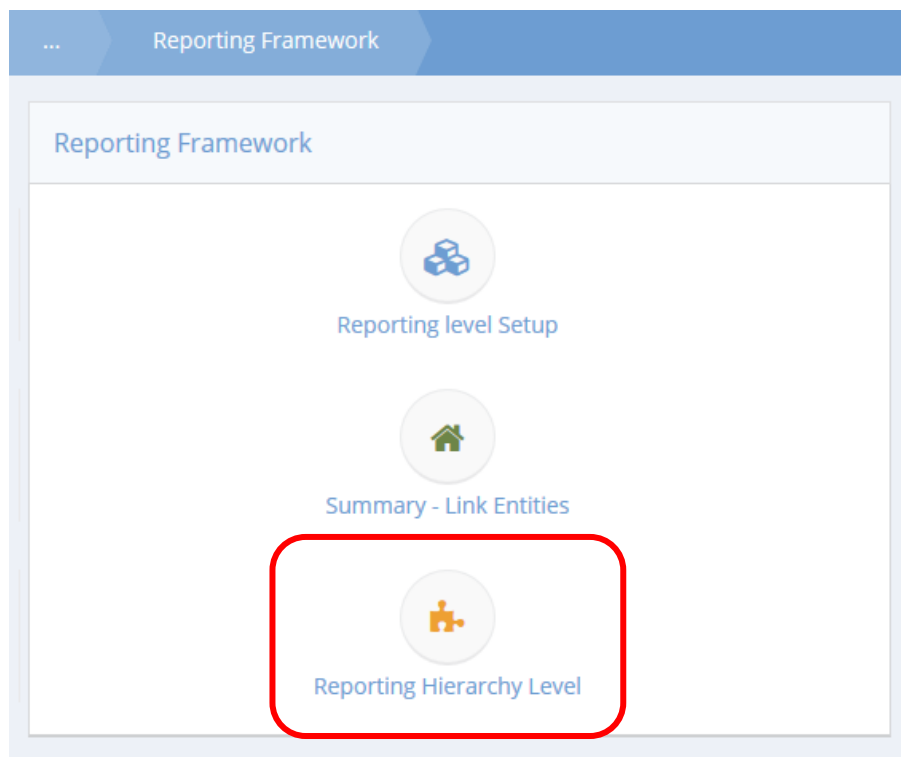
Use the search fields and **Search** button to locate the desired provider and select it when located. Alternatively, click the **+ Add New** button to create a new provider.

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

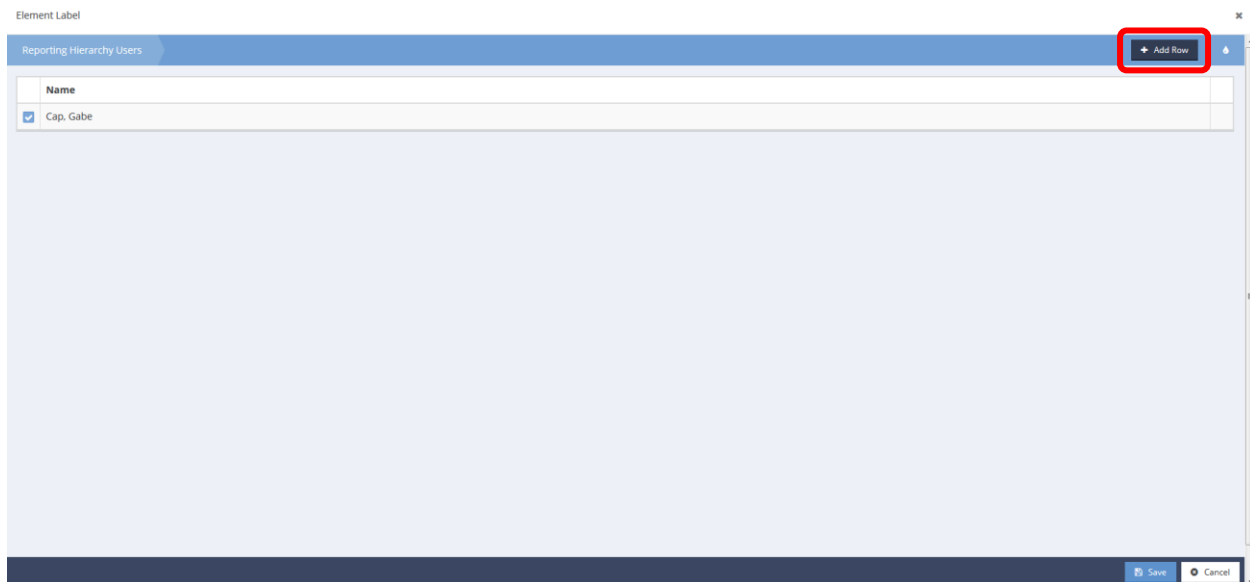


Click the icon for Reporting Hierarchy Level. The Reporting Level Setup form displays.

The image shows the "Reporting Level Setup" form. At the top, there is a blue header bar with the text "Reporting Level Setup" and two buttons: "+ Add New" and "+ Assign Users". The "+ Assign Users" button is highlighted with a red rectangle. Below the header, the form is divided into two main sections. The left section, titled "Reporting Hierarchy Nodes", contains a tree view with a root node "Consolidated" and two sub-nodes, "East" and "West". The right section, titled "Node Data", contains three dropdown menus: "Node Description" with "Consolidated" selected, "Level" with "1 - Consolidated" selected, and "Type" with "Hierarchy Node" selected.

Click the **+ Assign Users** button.

The Reporting Hierarchy Users form displays.



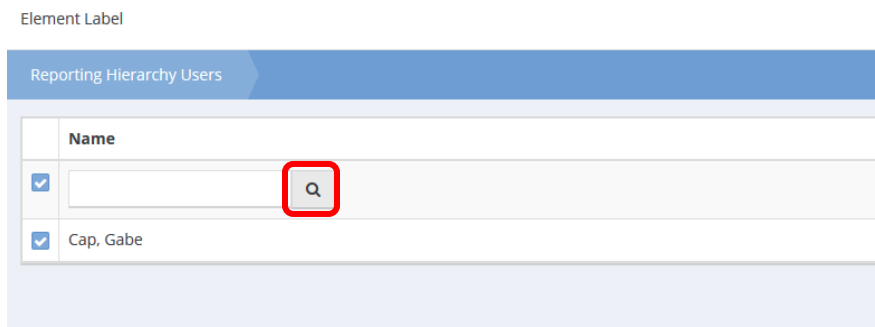
Element Label

Reporting Hierarchy Users

Name	
<input checked="" type="checkbox"/>	Cap. Gabe


Save Cancel

To assign a new user, click the **+ Add Row** button. A new row appears.



Element Label

Reporting Hierarchy Users

Name	
<input checked="" type="checkbox"/>	<input type="text"/> 
<input checked="" type="checkbox"/>	Cap. Gabe

Click the magnifying glass lookup  icon to lookup a user.

The Select Users Lookup form displays.

Select Users Lookup

Select Users

Name Organization

User Name	Name	Organization	Provider	Entity ID
Administrator	, Administrator	CaseWorthy		11
Gracie	CaseWorthy			12
Brian	Bingel, Brian	CaseWorthy		1305
sargeris	Argeris, Scott	CaseWorthy		1309
gtester	,			1313
gtest	,			1314
cameron	Beck, Cameron	CaseWorthy		1320
janeTjoe	Tjoe, Jane	CaseWorthy		1327
jtester	Testorg1, Jane			1459
gabecap	Cap, Gabe	Kingswood CAP		1460
crisis	Hotline, Crisis	CaseWorthy		1465
trtest				1483

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

Element Label

Reporting Hierarchy Users

Name

☒ Test, Test

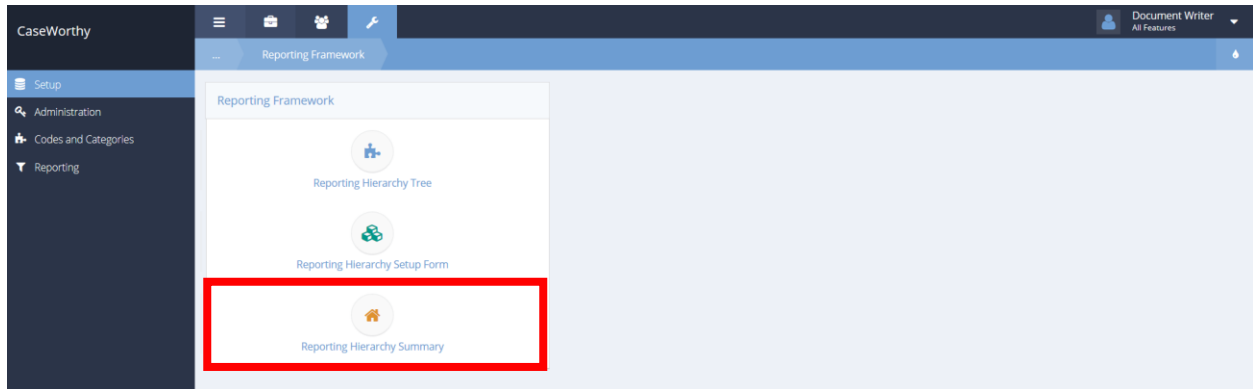
☒ Cap, Gabe

Click the 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.

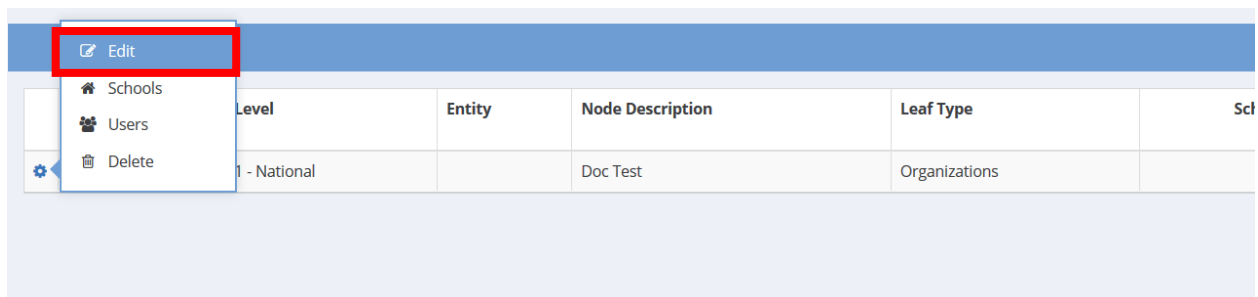
The screenshot shows the 'Reporting Level Setup' form. At the top, there are dropdown menus for 'Level' and 'Leaf Type', and an 'Add Row' button. Below is a table with the following data:

	Parent Level ID	Level	Entity	Node Description	Leaf Type	Schools	User	Level ID
	2	1 - National		Doc Test	Organizations	0	0	67

A red box highlights the gear icon in the first row of the table. At the bottom right of the form is a 'Done' button.

Click the action gear  icon associated with the desired entry.

Select Edit from the menu options.



The Edit Hierarchy Node form displays.

The 'Edit Hierarchy Node' form displays the following fields:

- Parent:
- Description:
- Level:
- Type:

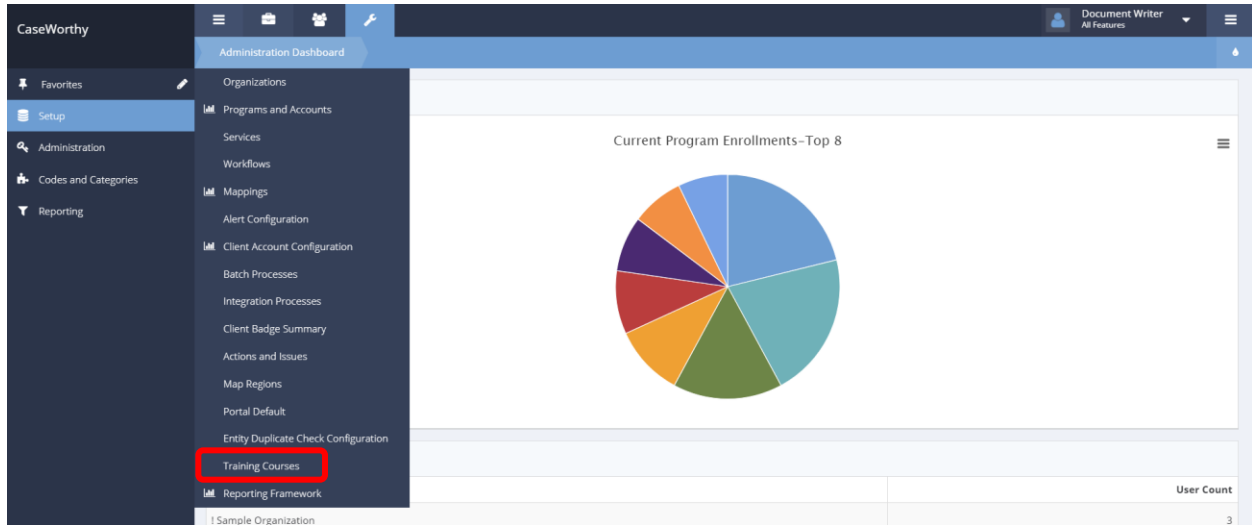
The 'Save' button is highlighted in a red box.

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

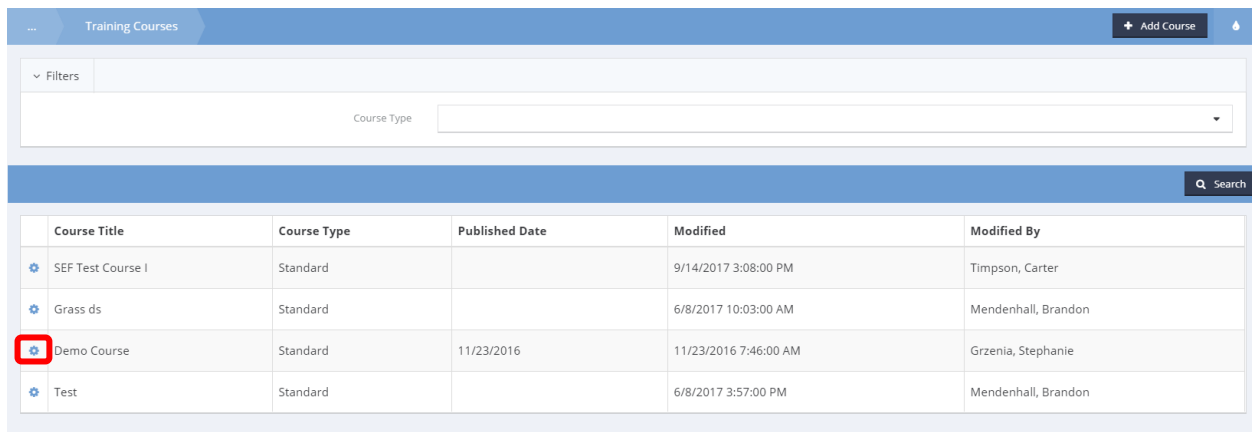
Edit Scoring

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

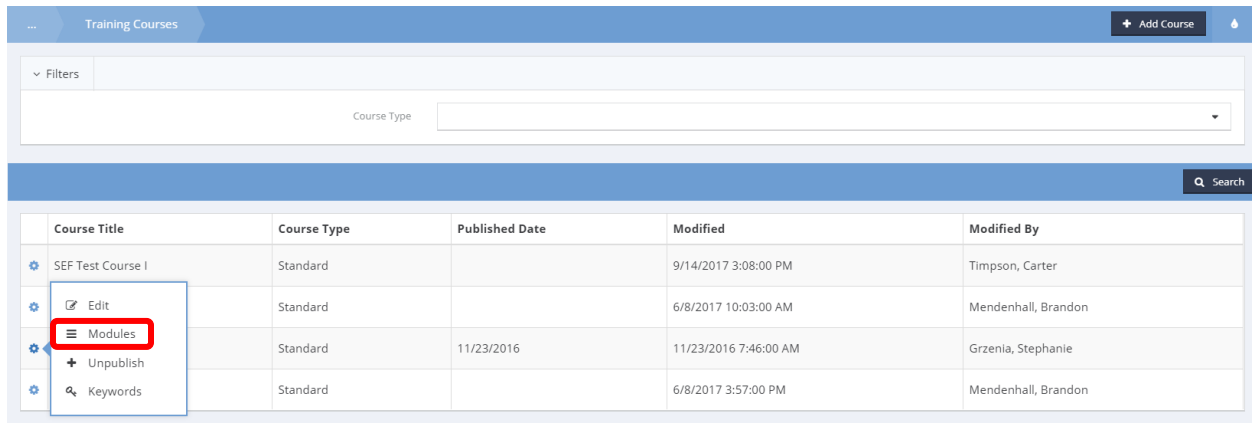
Navigation: Administration Dashboard>Setup>Training Courses>...Edit Scoring



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.



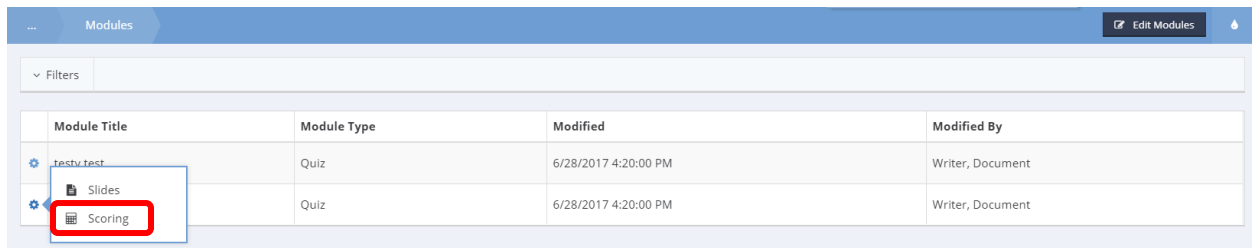
A pop-up menu appears.



The screenshot shows the 'Training Courses' interface. At the top, there's a 'Filters' section with a 'Course Type' dropdown. Below is a table with columns: Course Title, Course Type, Published Date, Modified, and Modified By. The first row is 'SEF Test Course I'. A pop-up menu is open for this row, showing options: Edit, Modules (highlighted with a red box), Unpublish, and Keywords.


Course Title	Course Type	Published Date	Modified	Modified By
SEF Test Course I	Standard		9/14/2017 3:08:00 PM	Timpson, Carter
	Standard		6/8/2017 10:03:00 AM	Mendenhall, Brandon
	Standard	11/23/2016	11/23/2016 7:46:00 AM	Grzenia, Stephanie
	Standard		6/8/2017 3:57:00 PM	Mendenhall, Brandon

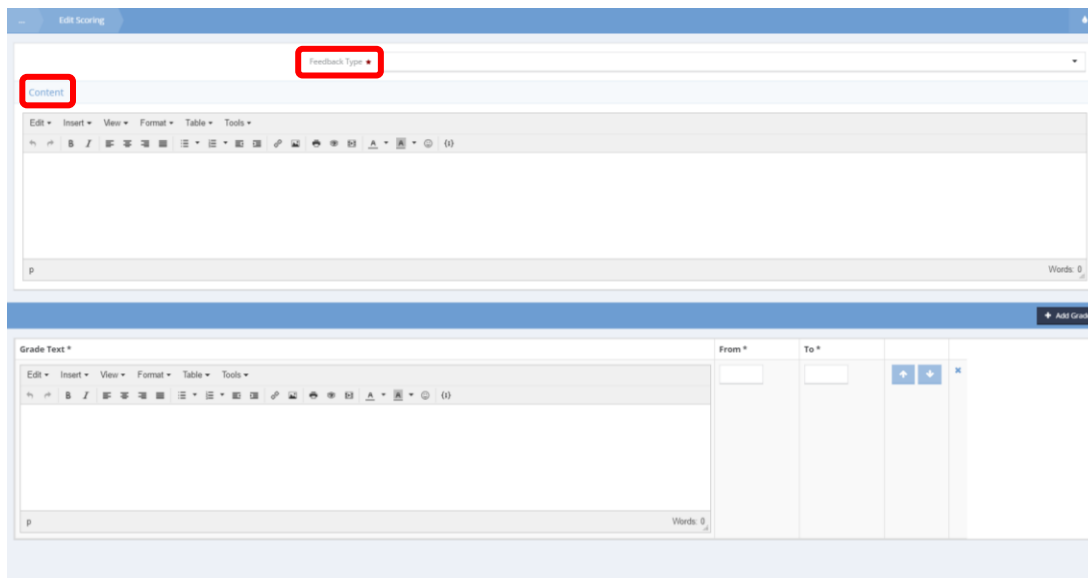
Select Modules from the pop-up menu. The Modules form appears.



The screenshot shows the 'Modules' interface. At the top, there's a 'Filters' section. Below is a table with columns: Module Title, Module Type, Modified, and Modified By. The first row is 'testy test'. A pop-up menu is open for this row, showing options: Slides and Scoring (highlighted with a red box).

Module Title	Module Type	Modified	Modified By
testy test	Quiz	6/28/2017 4:20:00 PM	Writer, Document
	Quiz	6/28/2017 4:20:00 PM	Writer, Document

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.



The screenshot shows the 'Edit Scoring' form. It has a 'Content' field (highlighted with a red box) and a 'Feedback Type' dropdown (highlighted with a red box). Below these are two text editors: 'Grade Text' and 'From *' to 'To *'. The 'Grade Text' editor has a toolbar with various formatting options. The 'From *' to 'To *' section has input fields and a '+' button.

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

... Edit Scoring

Filters

Feedback Type * Slide (After Quiz Completion)

Content

Edit Insert View Format Table Tools

p Words: 0

Grade Text * From * To *

Edit Insert View Format Table Tools

p Words: 0

+ Add Grade

Save Cancel

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.

Grade Text * From * To *

Edit Insert View Format Table Tools

p Words: 0




Grade Text * From * To *

Edit Insert View Format Table Tools

p Words: 0

+ Add Grade

Save Cancel

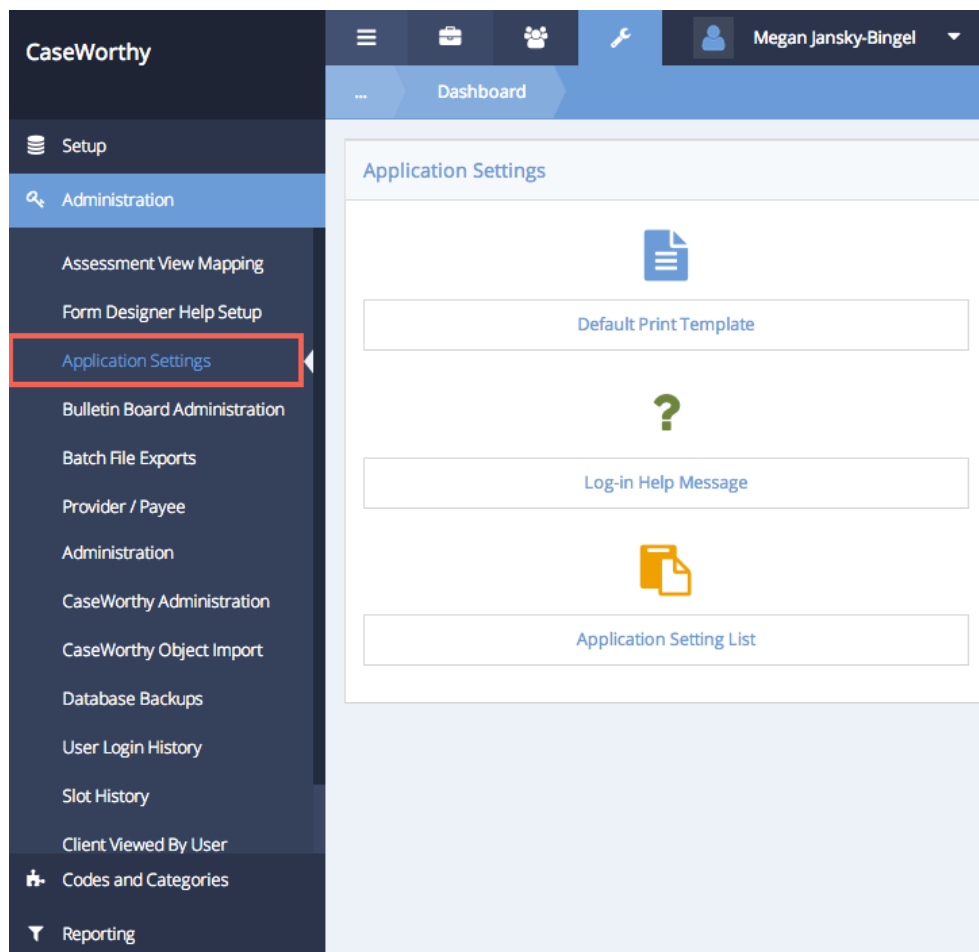
Click the  icon to delete the grade that the icon is associated with. Click the  icons to reorganize the grade text. Click the  button to save the form and return to the Modules page.

Administration Menu

Application Settings

(Administration>Administration>Application Settings)

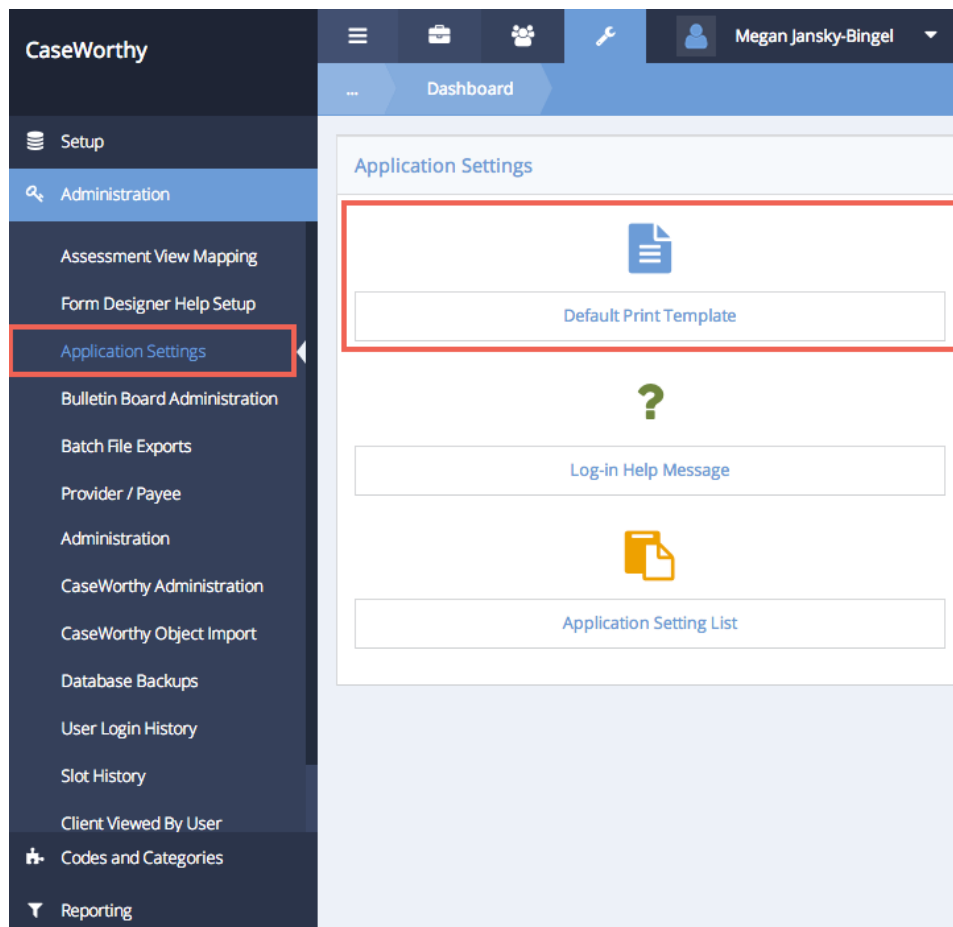
This link leads to a dashboard with options for customizing various application settings such as the default template to use when printing a case note and the “help” message that is displayed on the login page.




Default Print Template

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

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



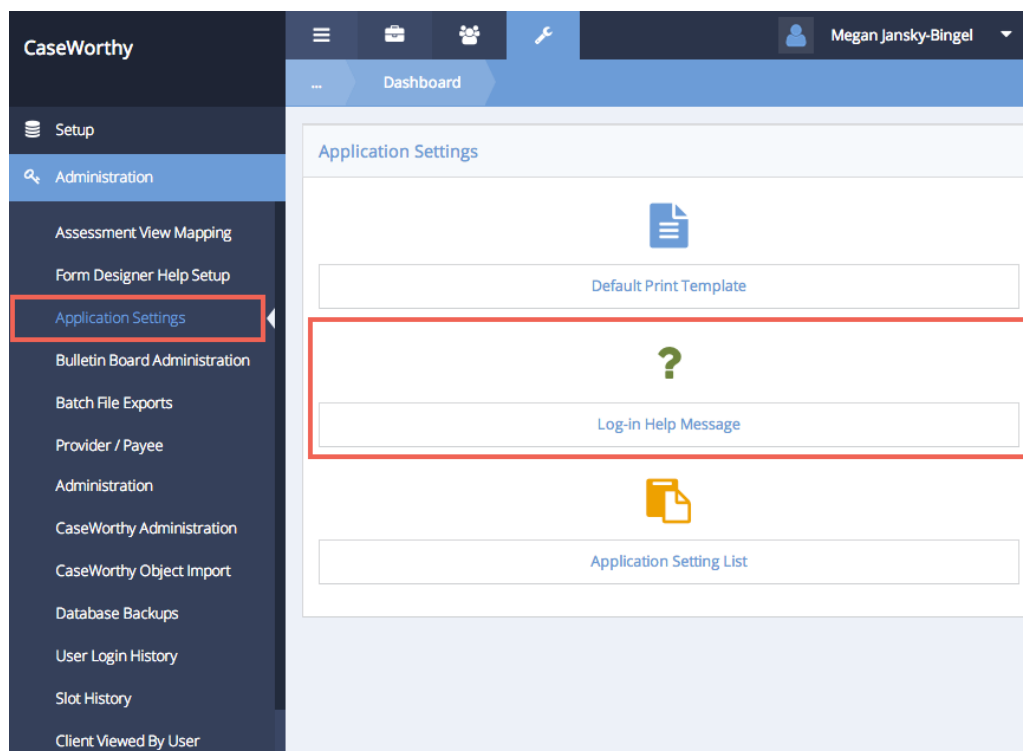
The Default Print Template form displays. Use the drop-down list to select the desired case note template that has been created in the system to use as a template for the header when printing case notes. For more information on entering case note templates into the system, see the Codes and Categories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


The screenshot displays the CaseWorthy System Administrator interface. The top navigation bar includes the CaseWorthy logo, a hamburger menu, icons for a briefcase, users, and a wrench, and a user profile for Megan Jansky-Bingel. The left sidebar is titled 'Setup' and lists various administration tasks. The 'Administration' section is expanded, showing options like 'Assessment View Mapping', 'Form Designer Help Setup', 'Application Settings', 'Bulletin Board Administration', 'Batch File Exports', 'Provider / Payee', 'Administration', 'CaseWorthy Administration', 'CaseWorthy Object Import', 'Database Backups', 'User Login History', 'Slot History', and 'Client Viewed By User'. The 'Application Settings' option is selected, leading to the 'Default Print Template' configuration page. This page features a help icon and a descriptive paragraph about the form's purpose. Below this, there is a form with a 'Default Case Note Print Template' label, a 'Default Header' dropdown menu, and a 'Setting Description' text field. At the bottom right, there are 'Save' and 'Cancel' buttons.

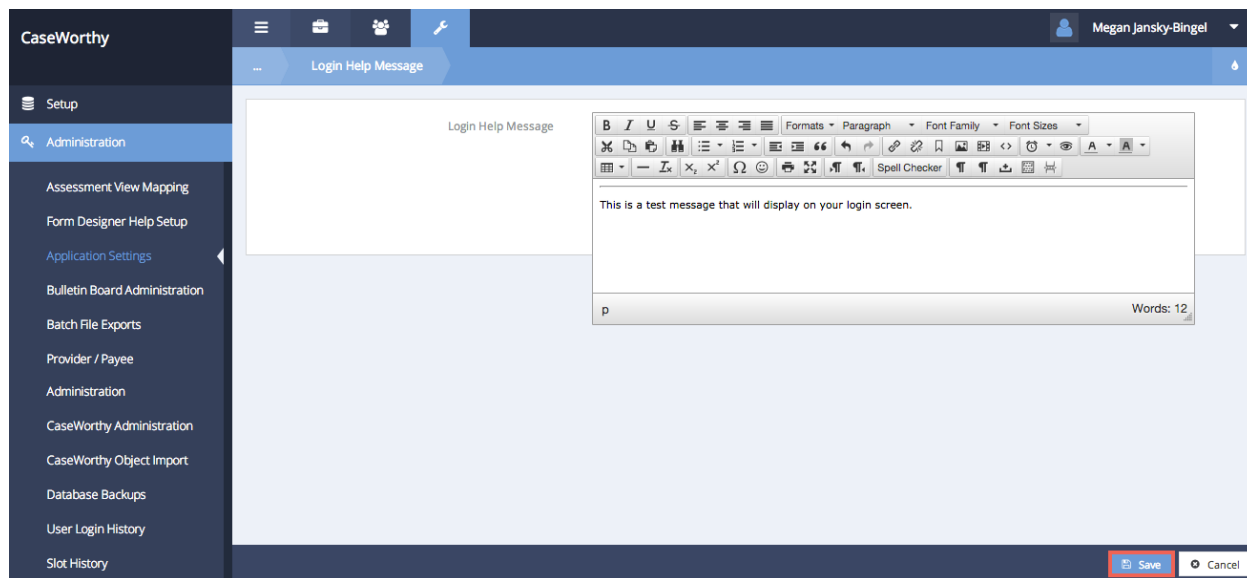
Log-In Help Message

(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.



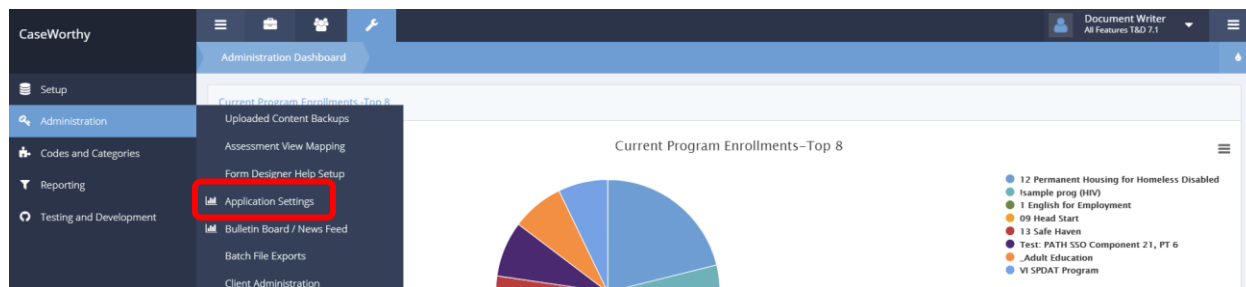
The Login Help Message form displays. Simply type the desired text into the text box and click  Save when finished.



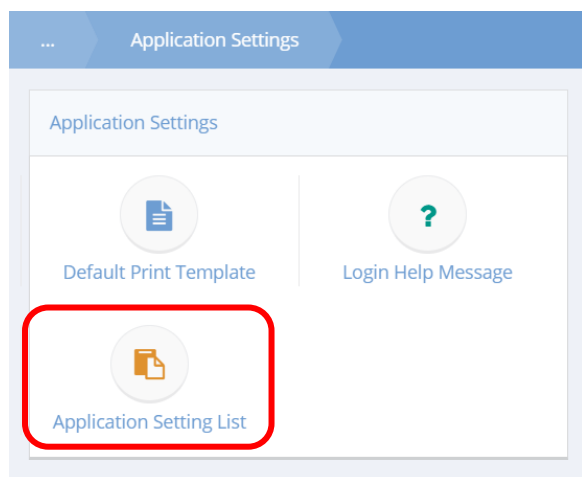
New Application Settings

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.

⚙	ResumeMakerWebUrl	
⚙	✎ Edit	false
⚙	HideExtraVetFields	false

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

... Edit Application Setup 🔔

Description

SSNRestriction

Value

false

Setting ID

35

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.

Start Date	End Date	Subject	View Message
11/5/2014	11/10/2014	Welcome Star of Hope Attendees	View Message
10/30/2013	11/1/2013	ECM Training	View Message
9/1/2013	9/15/2013	PIT Count - Due September 15th	View Message
9/1/2013	9/30/2013	Shut Notices should be checked Daily ...	View Message
9/1/2013	9/30/2013	Test Bulletin Board Display Message	View Message
8/18/2013	8/31/2013	Service Goal Plan Updates are due this week.	View Message
8/14/2013	8/16/2013	Completing HMIS Data	View Message
8/13/2013	8/31/2013	Goal Plan Reviews are due	View Message
8/1/2013	8/31/2013	Goal Plans are due this Month	View Message

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.

CaseWorthy

Enter Bulletin Board Message

Megan Jansky-Bingel

Setup

Administration

Assessment View Mapping

Form Designer Help Setup

Application Settings

Bulletin Board Administration

Batch File Exports

Provider / Payee Administration

CaseWorthy Administration

CaseWorthy Object Import

Database Backups

User Login History

Slot History

Client Viewed By User

Display dates for the bulletin board message

Start Date 11/10/2014 End Date * 11/14/2014

Subject and Long Description

Subject * System Training

Description

A training session has been schedule for Monday, November 11 at 10:00 am to introduce new users to new features developed by the system administration team. The training will take place via a web-hosted presentation. Please follow the instructions below.


1...

Words: 38

Save Cancel

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".

CaseWorthy

Bulletin Board Message Summary

+ Add New

	Start Date	End Date	Subject	View Message
	11/5/2014	11/10/2014	Welcome Star of Hope Attendees	
			ECM Training	
Edit			PIT Count - Due September 15th	
Permission			Shut Notices should be checked Daily ...	
Delete				
	9/1/2013	9/30/2013	Test Bulletin Board Display Message	
	8/18/2013	8/31/2013	Service Goal Plan Updates are due this week.	
	8/14/2013	8/16/2013	Completing HMIS Data	
	8/13/2013	8/31/2013	Goal Plan Reviews are due	
	8/1/2013	8/31/2013	Goal Plans are due this Month	
	8/1/2013	8/31/2013	Goal Plans are due today	
	7/16/2013	7/31/2013	Housing applications are due this week	
	7/16/2013	7/31/2013	Goal Plan Reviews	

Done

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

CaseWorthy

Bulletin Board Permission Summary

+ Add New

Permission Source	Permission Values
All Users	All Users

Done

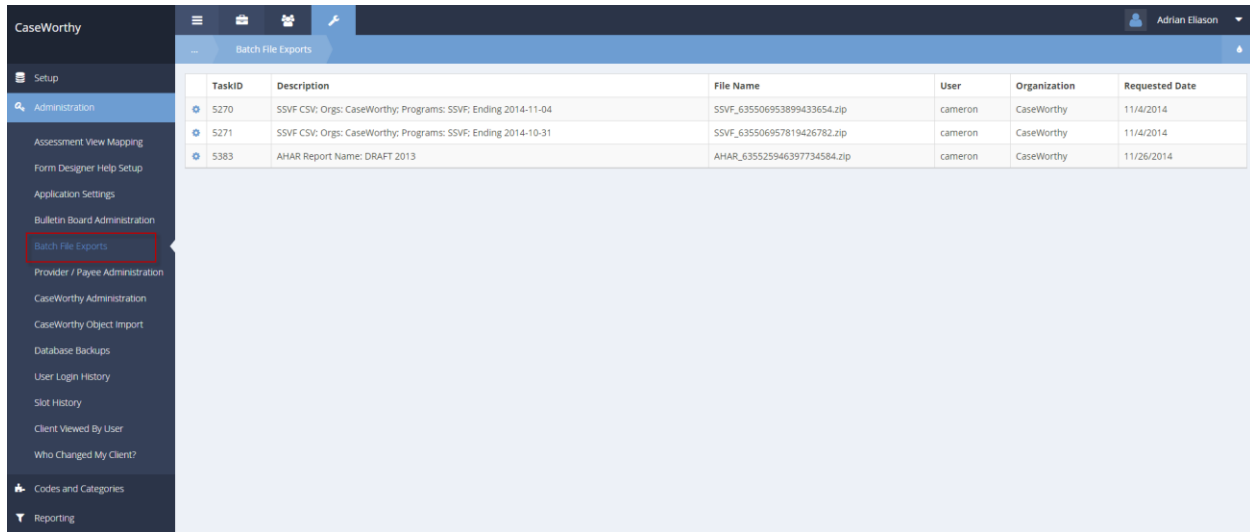
On the Bulletin Board Permission form, use the drop down lists to identify the type of permission (such as case managers assigned to a program, organizations, providers, provider categories, etc.), then select **Save**. To add additional permission types or entries from a type list, click **+ Add New**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

The screenshot shows the CaseWorthy application interface. On the left is a dark blue sidebar with a menu. The top of the sidebar has the 'CaseWorthy' logo. Below it, the menu includes 'Setup', 'Administration' (highlighted with a magnifying glass icon), and 'Codes and Categories'. Under 'Administration', there is a list of options: 'Assessment View Mapping', 'Form Designer Help Setup', 'Application Settings', 'Bulletin Board Administration' (which is selected and has a left-pointing arrow), 'Batch File Exports', 'Client Administration', 'Provider / Payee', 'Administration', 'CaseWorthy Administration', 'CaseWorthy Object Import', 'Database Backups', 'User Login History', 'Slot History', and 'Client Viewed By User'. The main content area has a top navigation bar with a hamburger menu, icons for a briefcase, a group of people, and a wrench, followed by a user profile 'Megan Jansky-Bingel' with a dropdown arrow. Below this is a breadcrumb trail 'Bulletin Board Permission'. The main form area contains two dropdown menus: 'Permission Type *' and 'List *', both of which are highlighted with a red rectangular box. At the bottom right of the form are two buttons: 'Save' (highlighted with a red box) and 'Cancel'.

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.



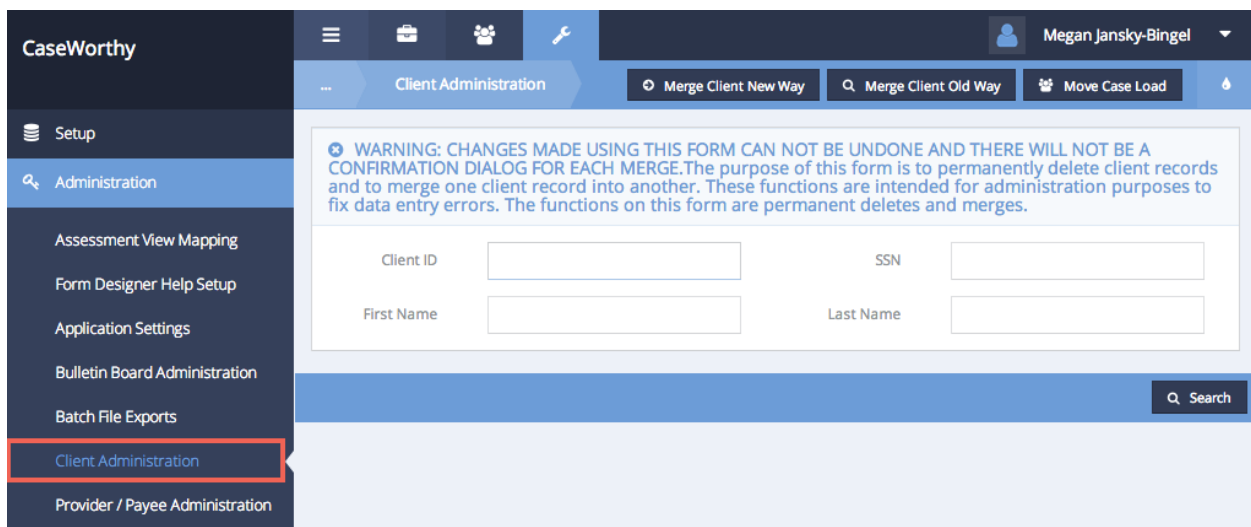
TaskID	Description	File Name	User	Organization	Requested Date
5270	SSVF CSV: Orgs: CaseWorthy: Programs: SSVF; Ending 2014-11-04	SSVF_635506953899433654.zip	cameron	CaseWorthy	11/4/2014
5271	SSVF CSV: Orgs: CaseWorthy: Programs: SSVF; Ending 2014-10-31	SSVF_635506957819426782.zip	cameron	CaseWorthy	11/4/2014
5383	AHAR Report Name: DRAFT 2013	AHAR_635525946397734584.zip	cameron	CaseWorthy	11/26/2014

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.



WARNING: CHANGES MADE USING THIS FORM CAN NOT BE UNDONE AND THERE WILL NOT BE A CONFIRMATION DIALOG FOR EACH MERGE. The purpose of this form is to permanently delete client records and to merge one client record into another. These functions are intended for administration purposes to fix data entry errors. The functions on this form are permanent deletes and merges.



Client ID	<input type="text"/>	SSN	<input type="text"/>
First Name	<input type="text"/>	Last Name	<input type="text"/>

Search

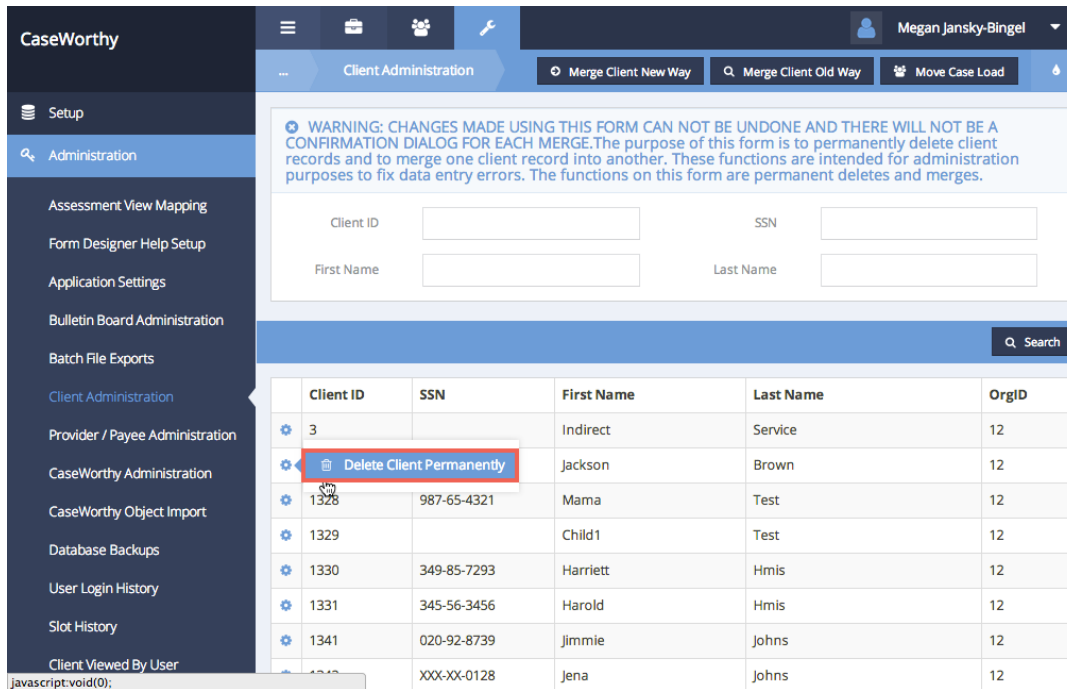
Permanent Delete

(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.



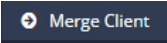
The screenshot shows the CaseWorthy System Administrator interface. The left sidebar contains a navigation menu with options like Setup, Administration, Assessment View Mapping, Form Designer Help Setup, Application Settings, Bulletin Board Administration, Batch File Exports, Client Administration, Provider / Payee Administration, CaseWorthy Administration, CaseWorthy Object Import, Database Backups, User Login History, Slot History, and Client Viewed By User. The main content area is titled 'Client Administration' and includes a warning message: 'WARNING: CHANGES MADE USING THIS FORM CAN NOT BE UNDONE AND THERE WILL NOT BE A CONFIRMATION DIALOG FOR EACH MERGE. The purpose of this form is to permanently delete client records and to merge one client record into another. These functions are intended for administration purposes to fix data entry errors. The functions on this form are permanent deletes and merges.' Below the warning is a form with input fields for Client ID, SSN, First Name, and Last Name. A search button is located to the right of the form. Below the search bar is a table of client records. The table has columns for Client ID, SSN, First Name, Last Name, and OrgID. A dropdown menu is open for the first record (Client ID 3), showing the option 'Delete Client Permanently' highlighted in red. The table contains the following data:

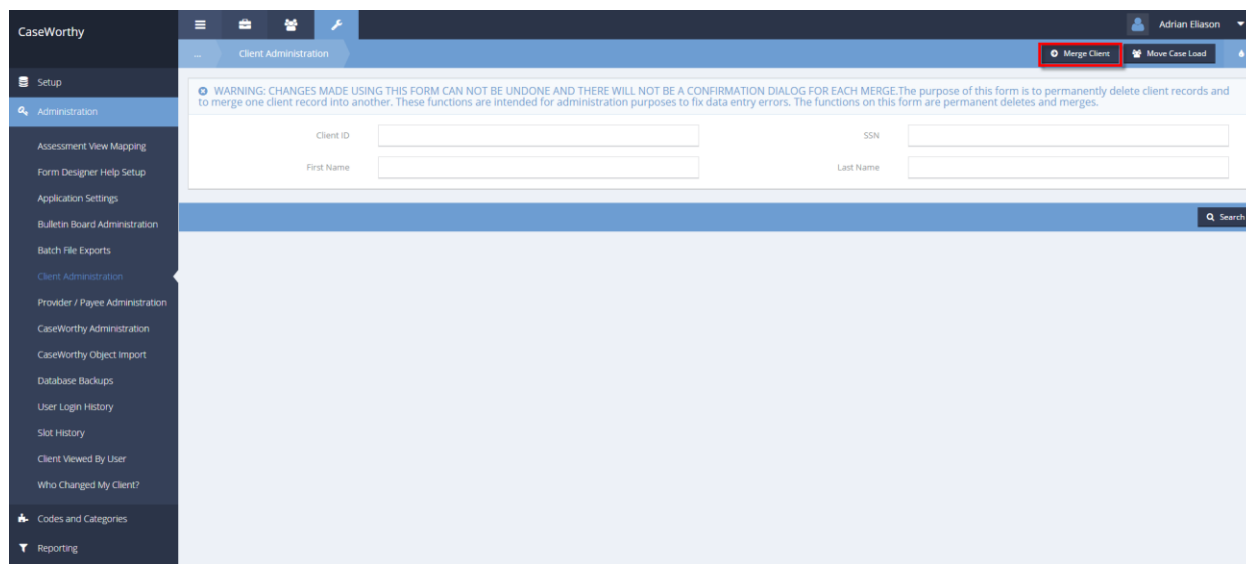
Client ID	SSN	First Name	Last Name	OrgID
3		Indirect	Service	12
1328	987-65-4321	Mama	Test	12
1329		Child1	Test	12
1330	349-85-7293	Harriett	Hmis	12
1331	345-56-3456	Harold	Hmis	12
1341	020-92-8739	Jimmie	Johns	12
1342	XXX-XX-0128	Jena	Johns	12

Merge Client Records


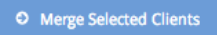
(Administration>Administration>Client Administration>Merge Client Records)

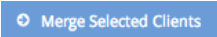
THIS ACTION CANNOT BE REVERSED. MERGING THE SELECTED RECORDS IS A PERMANENT ACTION.

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



The screenshot shows the CaseWorthy system interface. On the left is a dark sidebar with a menu including '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', and 'Reporting'. The 'Client Administration' menu item is selected. The main content area has a top bar with 'Client Administration' and a 'Merge Client' button highlighted with a red box. Below this is a warning message: 'WARNING: CHANGES MADE USING THIS FORM CAN NOT BE UNDONE AND THERE WILL NOT BE A CONFIRMATION DIALOG FOR EACH MERGE. The purpose of this form is to permanently delete client records and to merge one client record into another. These functions are intended for administration purposes to fix data entry errors. The functions on this form are permanent deletes and merges.' Below the warning are four input fields: 'Client ID', 'SSN', 'First Name', and 'Last Name'. A search bar is visible in the bottom right corner of the main area.

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  button.

A warning message DOES NOT appear – clicking on the  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

Merge Client

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 ClientID A

Client Name B ClientID B

Merge Selected Clients Cancel

CaseWorthy

Megan Jansky-Bingel

Merge Client

⚠ 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	ttr, tesssttt	ClientID B	3516

Running Merge Selected Clients

Client Viewed By User

javascript:void(0);

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.

CaseWorthy

Megan Jansky-Bingel

Client Administration


Merge Client New Way Merge Client Old Way Move Case Load


⚠ WARNING: CHANGES MADE USING THIS FORM CAN NOT BE UNDONE AND THERE WILL NOT BE A CONFIRMATION DIALOG FOR EACH MERGE. The purpose of this form is to permanently delete client records and to merge one client record into another. These functions are intended for administration purposes to fix data entry errors. The functions on this form are permanent deletes and merges.

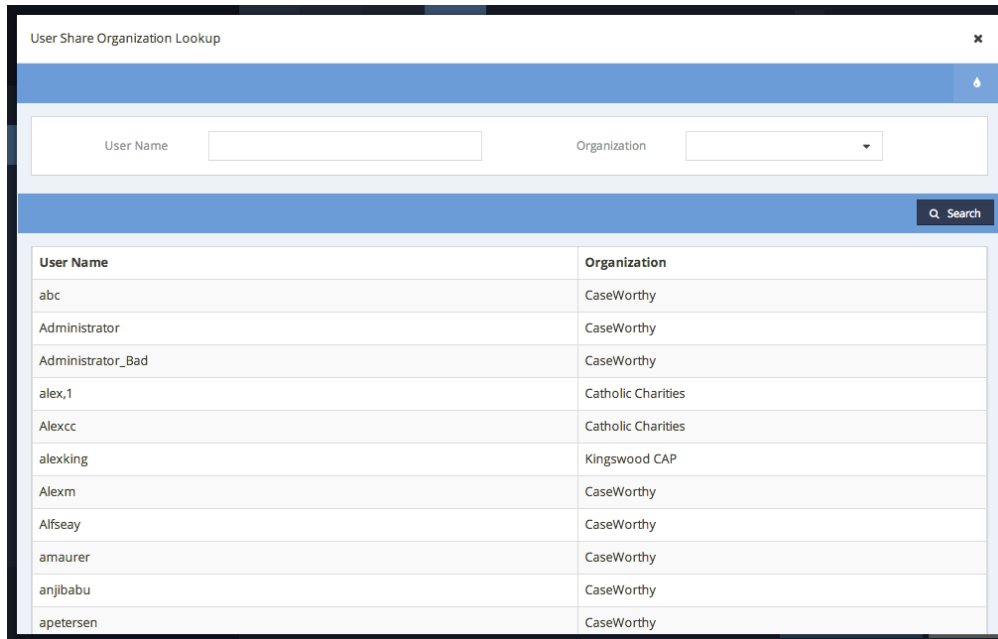
Client ID		SSN	
First Name		Last Name	

Search

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.

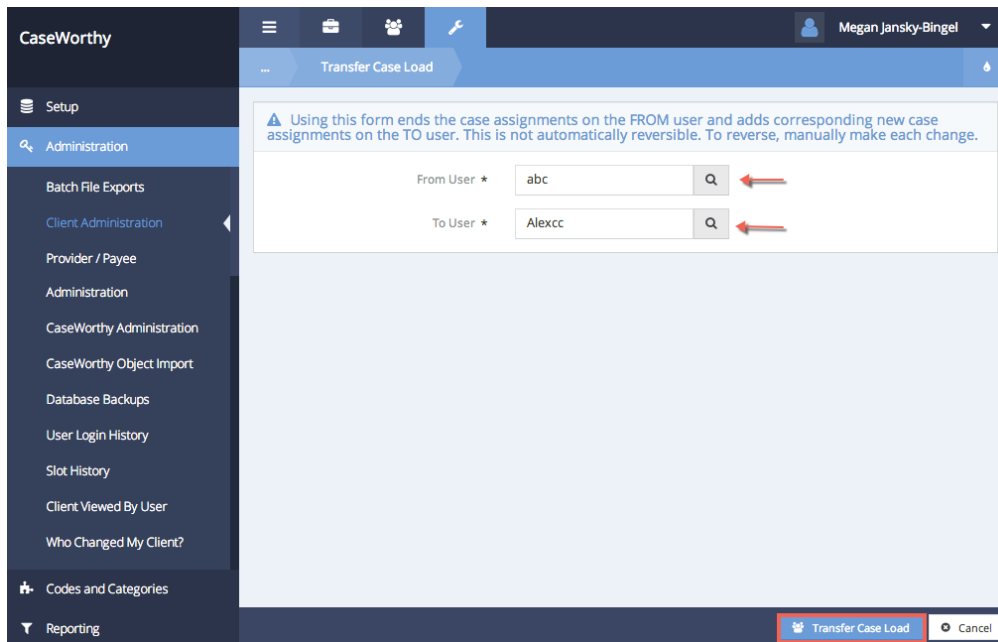
A warning message DOES NOT appear – clicking on the  Transfer Case Load button initiates the transfer process IMMEDIATELY. **THIS ACTION CANNOT BE AUTOMATICALLY REVERSED. To reverse this action each record must be changed manually in the Case Management area of the system. TANSFERING THE CASE MANAGER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



User Share Organization Lookup

User Name Organization

User Name	Organization
abc	CaseWorthy
Administrator	CaseWorthy
Administrator_Bad	CaseWorthy
alex,1	Catholic Charities
Alexcc	Catholic Charities
alexking	Kingswood CAP
Alexm	CaseWorthy
Alfseay	CaseWorthy
amaurer	CaseWorthy
anjibabu	CaseWorthy
apetersen	CaseWorthy



CaseWorthy

Transfer Case Load

Using this form ends the case assignments on the FROM user and adds corresponding new case assignments on the TO user. This is not automatically reversible. To reverse, manually make each change.

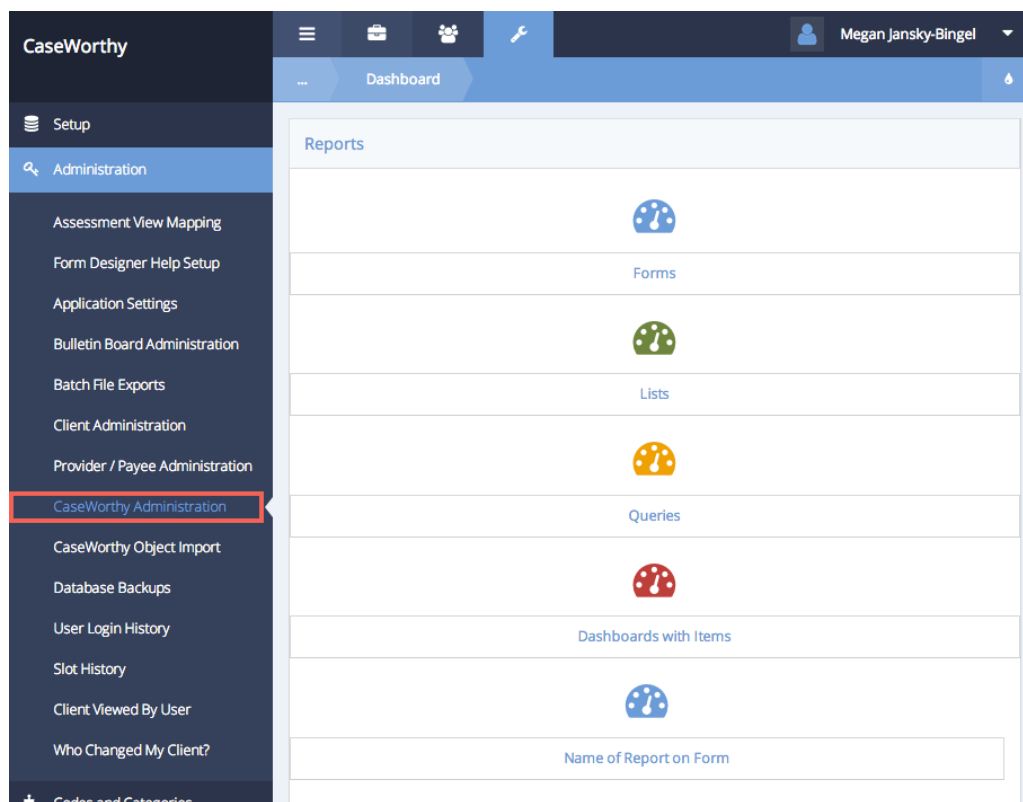
From User *

To User *

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.




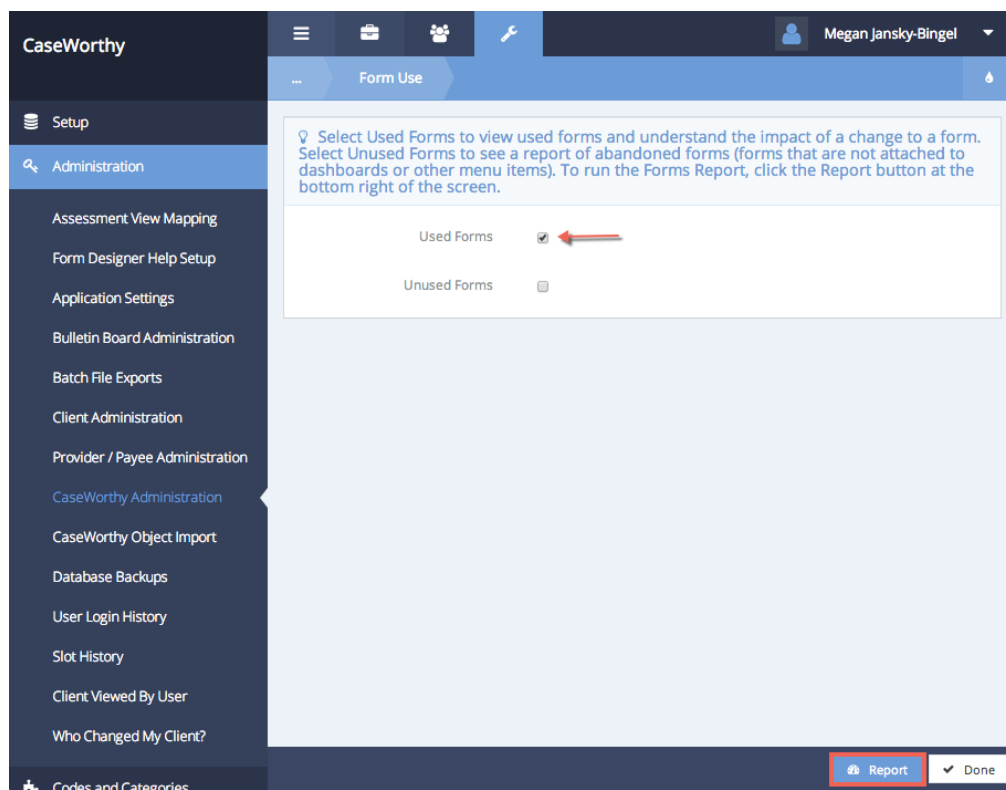
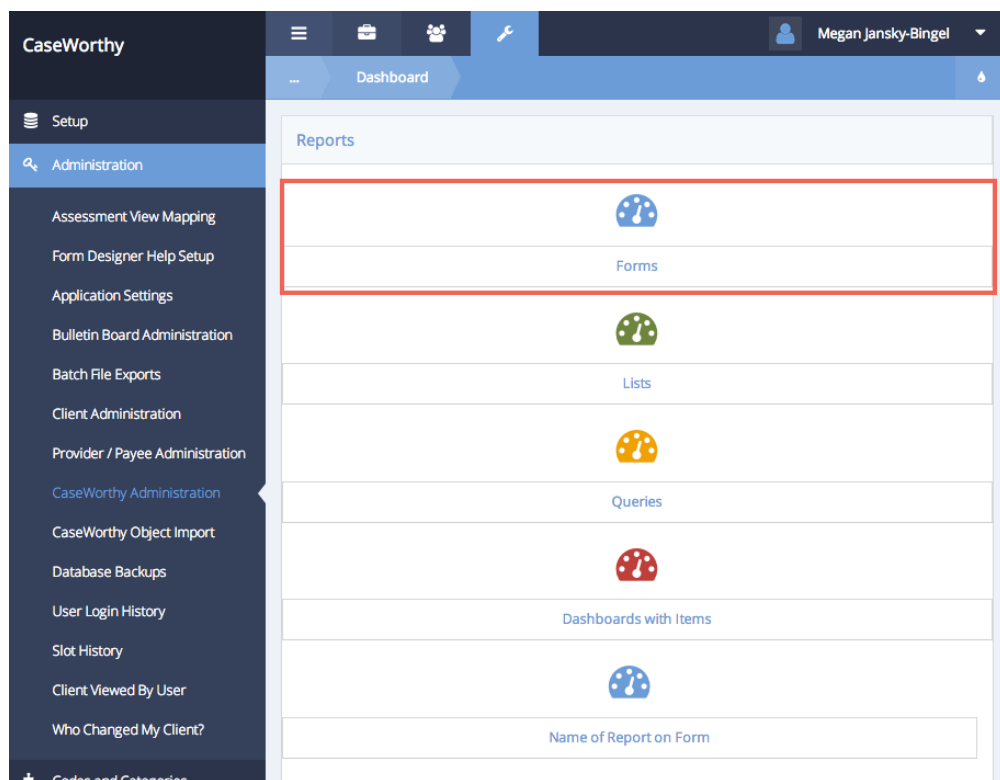
Reports

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




1 of 41 Find | Next


CaseWorthy Forms Report

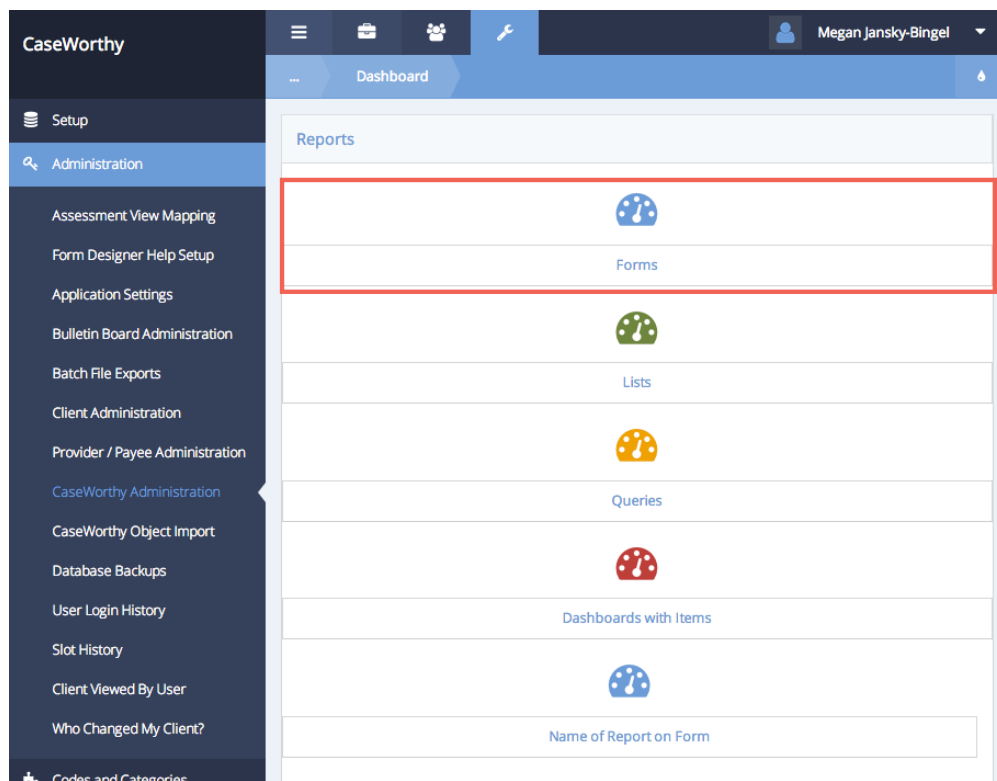
Run By mjbingel - CaseWorthy on 11/19/2014 12:46:52 PM

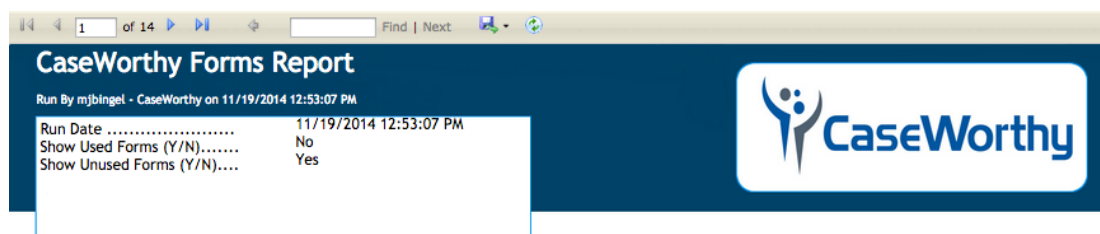
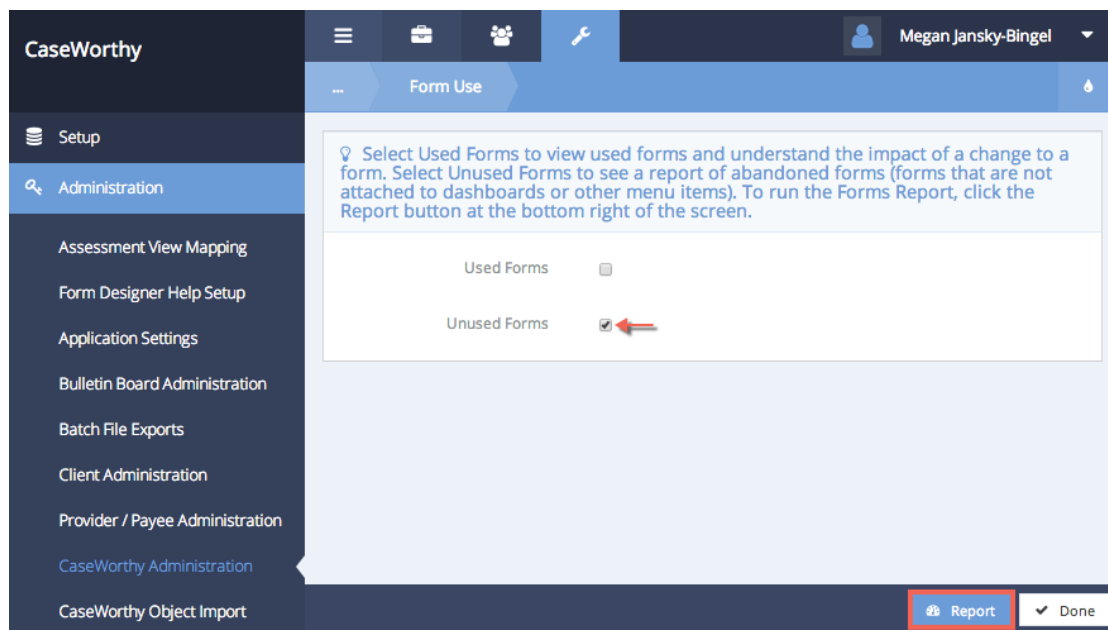
Run Date	11/19/2014 12:46:52 PM
Show Used Forms (Y/N).....	Yes
Show Unused Forms (Y/N).....	No



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.

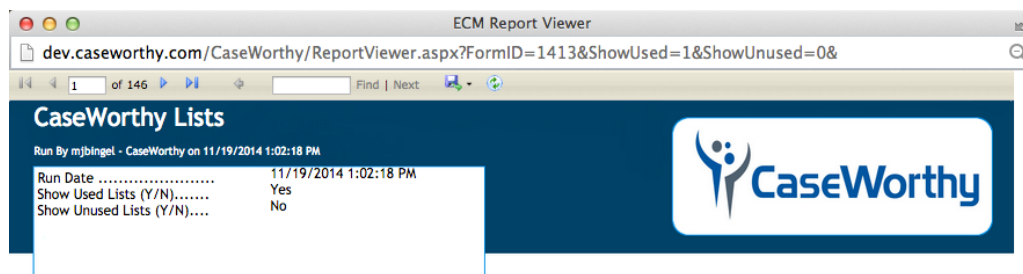
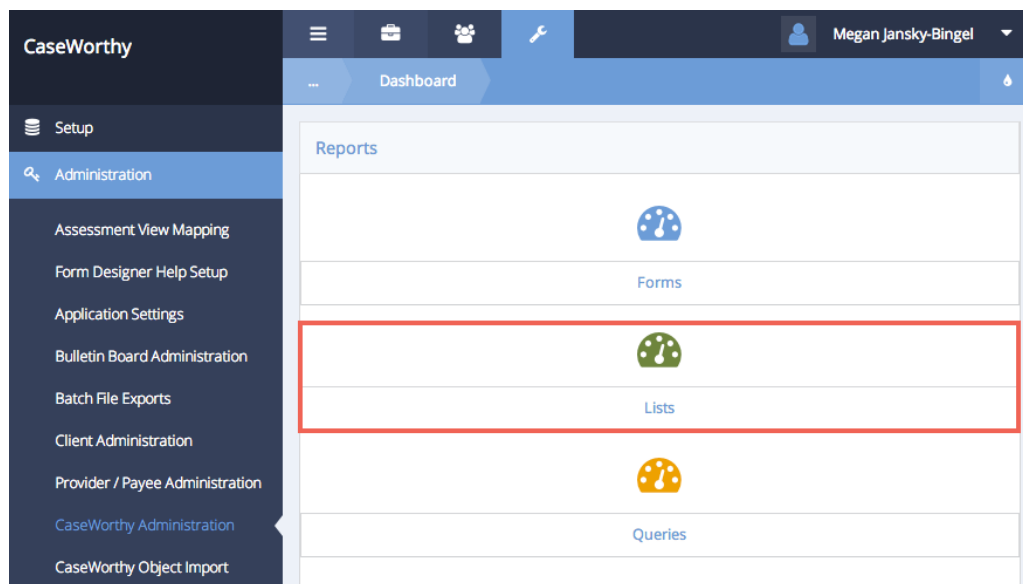





Abandoned Forms			
Form ID	Form Name	Created By	Created Date
110	HUD Program Assessment (Input)	Administrator	8/1/2012
115	Immunizations	Administrator	8/1/2012
136	Service type to report map	Administrator	8/1/2012
161	Issue Type to Report Type Map	Administrator	8/1/2012
208	Case Manager Assignments	Administrator	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

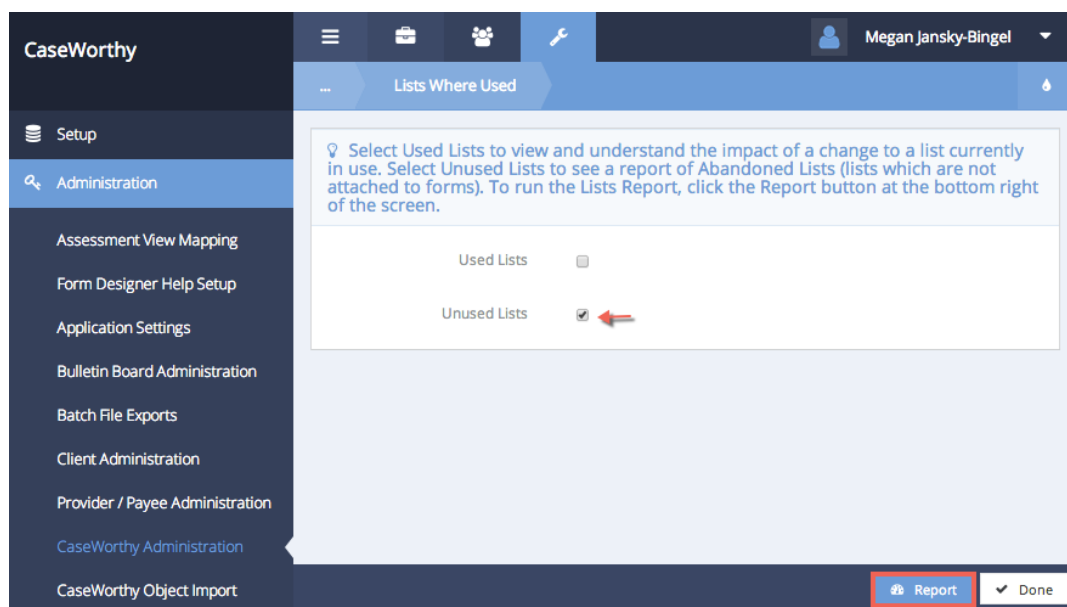
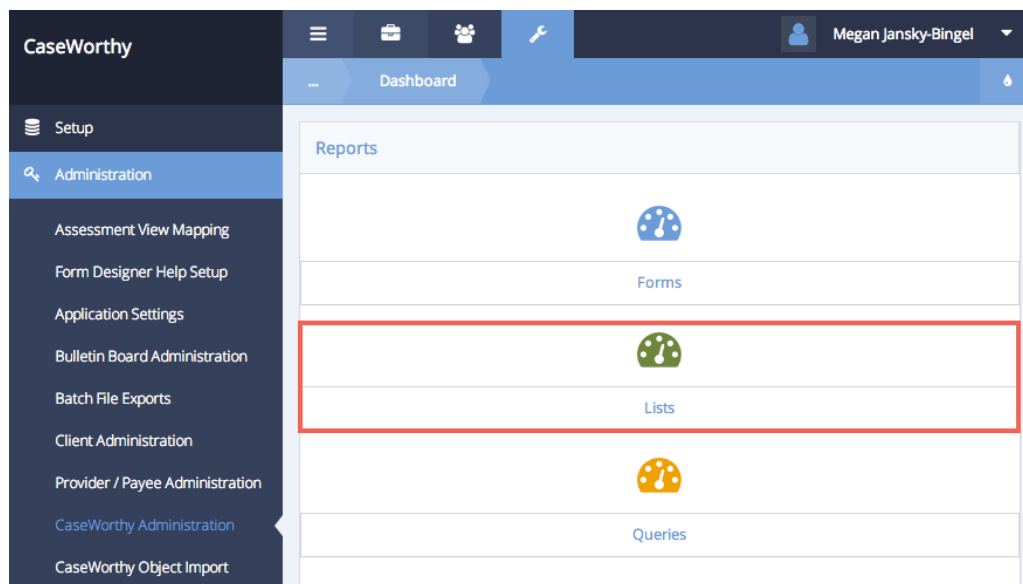
Lists

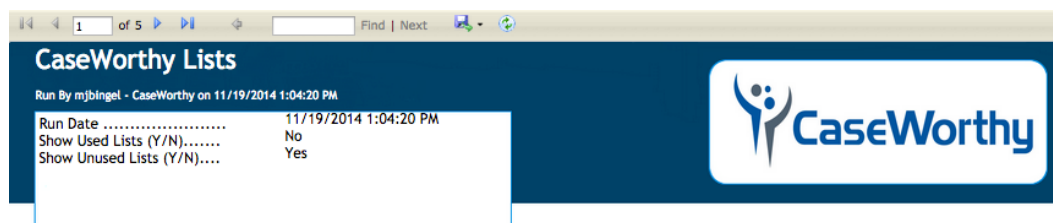
To view lists that are active and currently in use, click on the Lists icon. On the launch page, select “Used Lists” and click on the  **Report** button. A report displays listing the list ID and name as well as who created it and when.



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.

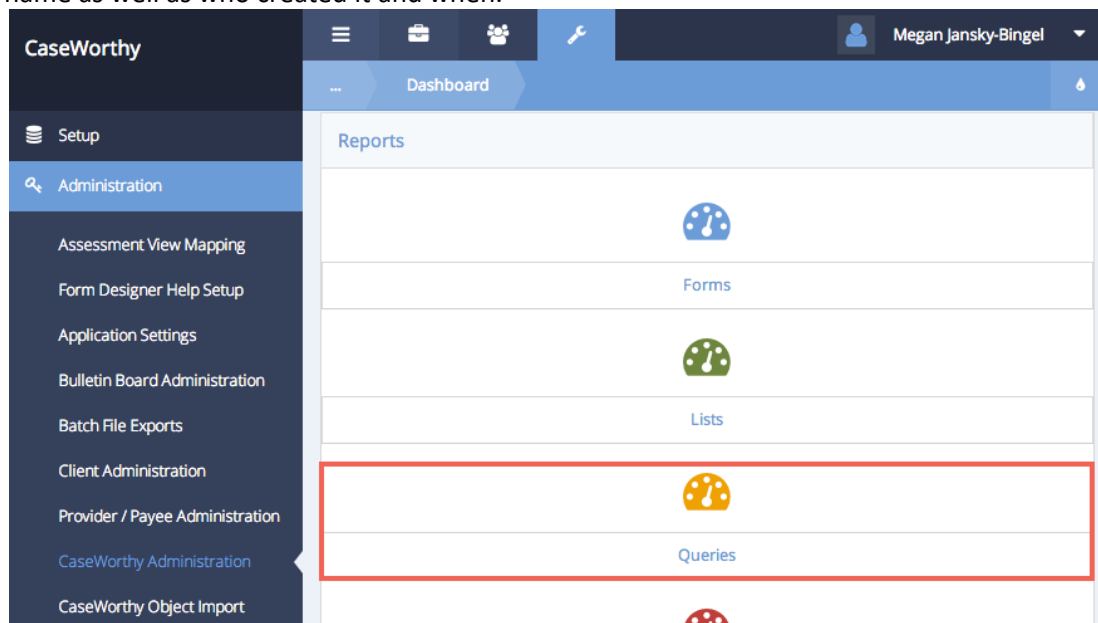




Abandoned Lists				
List ID	List Description	Created By	Created Date	
14	Document Check	Administrator	8/1/2012	
19	Grade Level	Administrator	8/1/2012	
21	Affordability Program	Administrator	8/1/2012	
42	HMIS Primary Housing Type	Administrator	8/1/2012	
47	HMIS Target Pop A	Administrator	8/1/2012	
71	Crimes Category ID	Administrator	8/1/2012	
83	Role Preference Types	Administrator	8/1/2012	
88	ProviderRelationshipContact	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	same 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 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 ☐

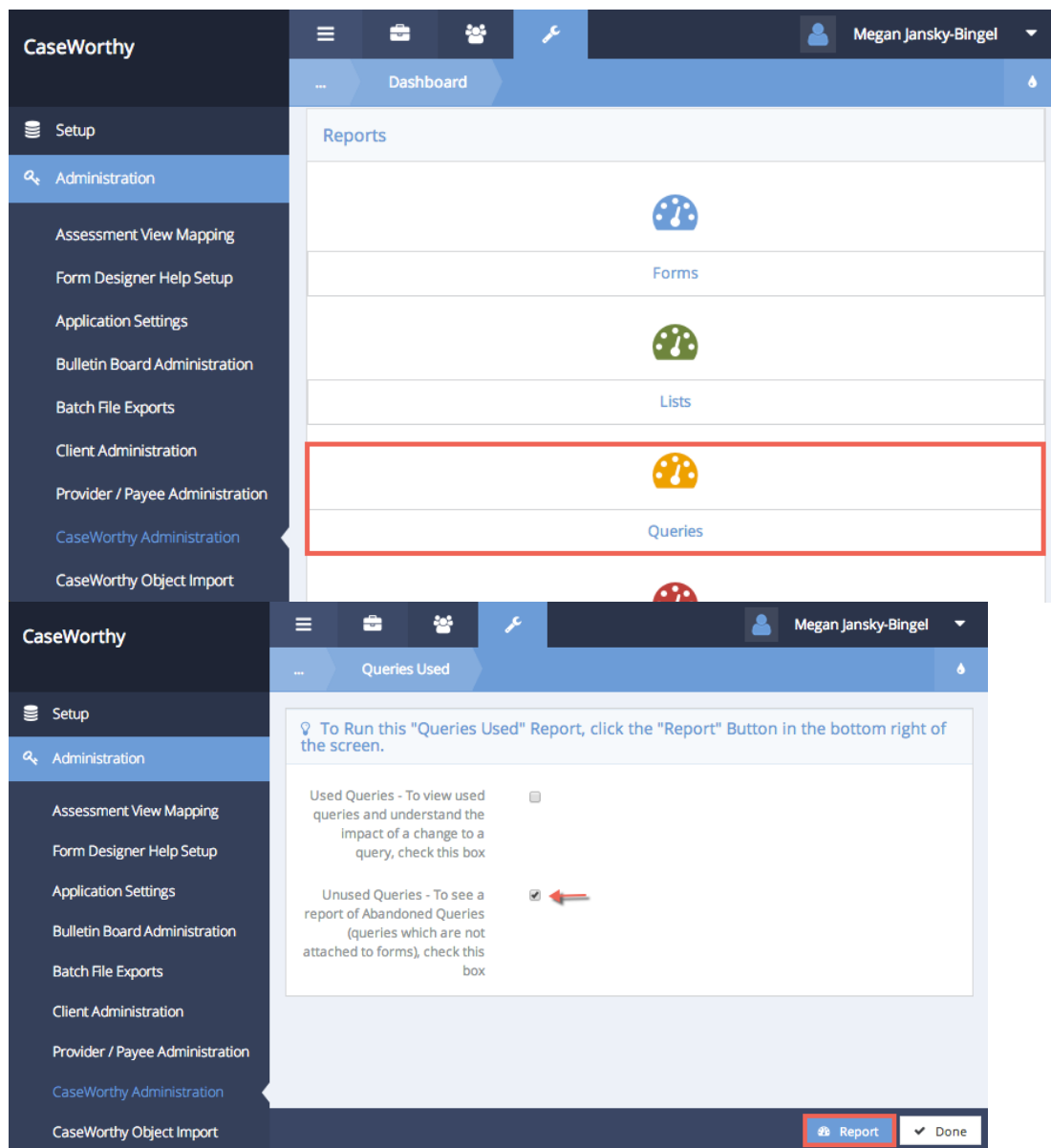
CaseWorthy Queries Report
Run By mjbingel - CaseWorthy on 11/19/2014 1:08:49 PM

Run Date 11/19/2014 1:08:49 PM
Show Used Queries? Yes
Show Unused Queries? No

Queries Used in CaseWorthy with Forms Containing the Query

QueryID	QueryName	Created By	Created Date
1	Test query	JaneTjoe	3/13/2014
FormID	Form Name		
1	Add New Client		
QueryID	QueryName	Created By	Created Date
2	Service Spreadsheet	Administrator	8/1/2012
FormID	Form Name		
3	Service Spreadsheet		
QueryID	QueryName	Created By	Created Date
5	Find Zip Code	JaneTjoe	3/13/2014
FormID	Form Name		
5	Find Zip Code		
QueryID	QueryName	Created By	Created Date
8	Providers With Orgs	kallen	10/20/2014
FormID	Form Name		


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 Queries Report


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

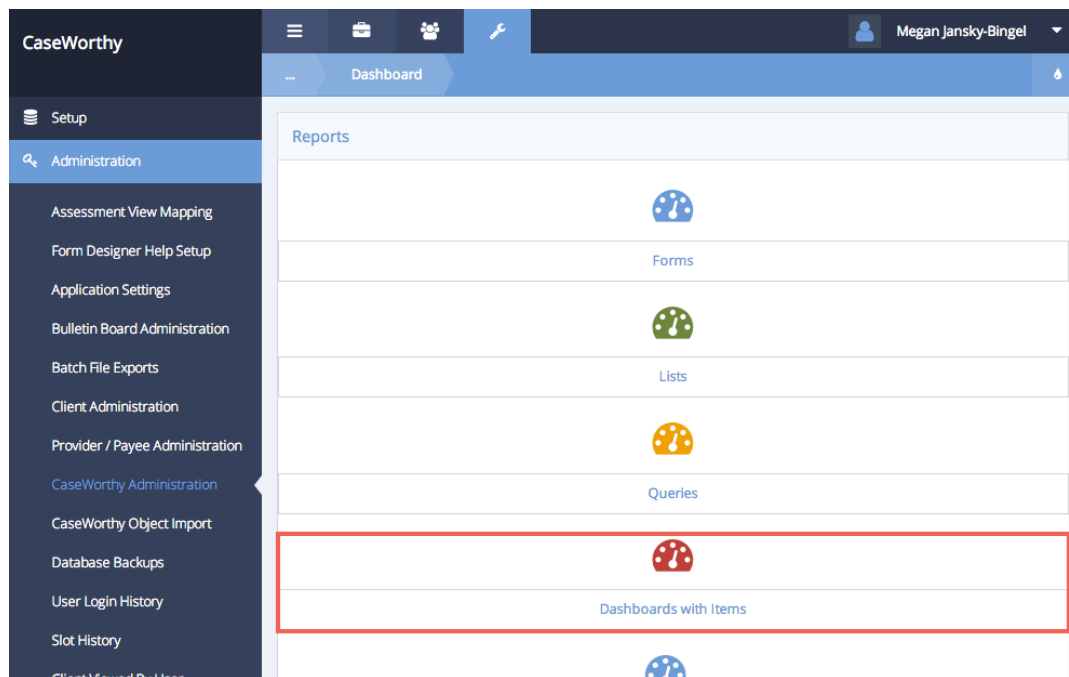
Run Date 11/19/2014 1:08:00 PM
 Show Used Queries? No
 Show Unused Queries? Yes




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	Open/Toile 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.

The screenshot displays the CaseWorthy System Administrator interface. The left sidebar contains a navigation menu with the following items: Setup, Administration (highlighted), Assessment View Mapping, Form Designer Help Setup, Application Settings, Bulletin Board Administration, Batch File Exports, Client Administration, Provider / Payee Administration, CaseWorthy Administration (highlighted), CaseWorthy Object Import, Database Backups, User Login History, Slot History, Client Viewed By User, and Who Changed My Client?. The main content area is divided into two sections. The top section, titled 'Dashboard', shows a 'Reports' list with icons and labels for Forms, Lists, Queries, and Dashboards with Items. A red box highlights the 'Name of Report on Form' field. The bottom section, titled 'Reports Associated with Forms', contains a text input field for 'Form ID(s)' with the value '0'. Below the input field, there are three instructions: 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). At the bottom right, there are 'Report' and 'Done' buttons.

CaseWorthy

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

CaseWorthy

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

Dashboard

Reports

Forms

Lists

Queries

Dashboards with Items

Name of Report on Form

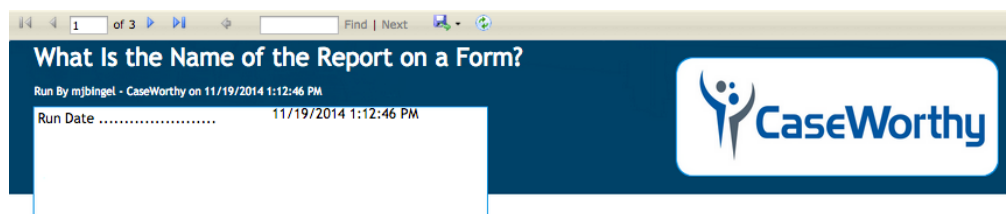
Reports Associated with Forms

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



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
507	Program Services Summary Report	ProgramServicesSummary_v4

Manage CaseWorthy™ Objects

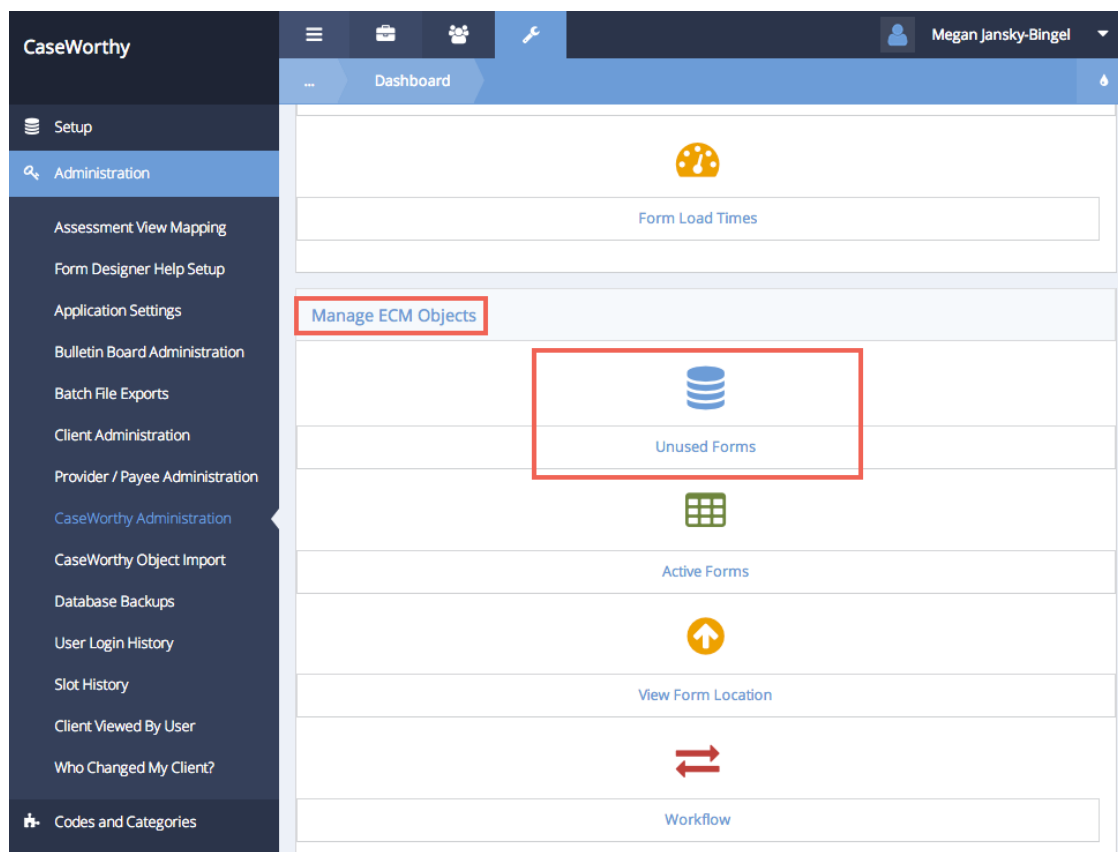
(Administration>Administration>CaseWorthy™ Administration>Manage CaseWorthy™ Objects)

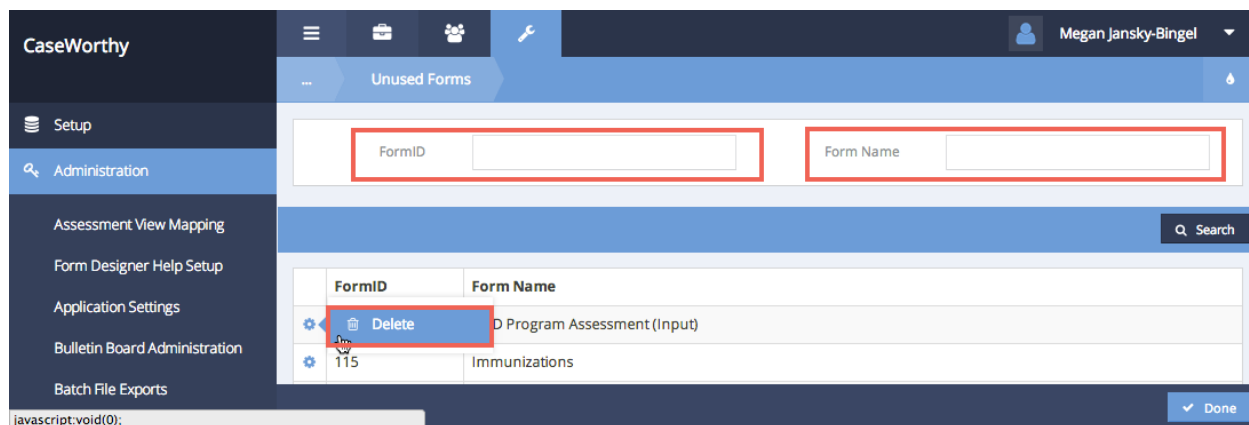
This area allows system administrators to easily access and manage forms within the system.

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.

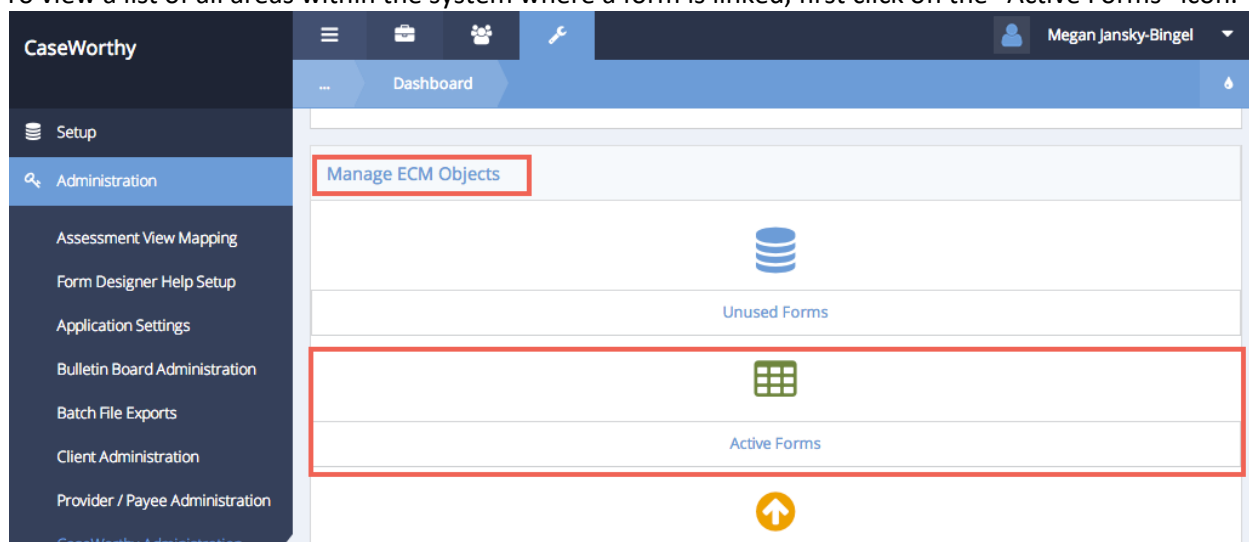
A warning message DOES NOT appear – clicking on the “Delete” option initiates the delete process IMMEDIATELY. **THIS ACTION CANNOT BE REVERSED. DELETING THE SELECTED FORM IS A PERMANENT ACTION.**



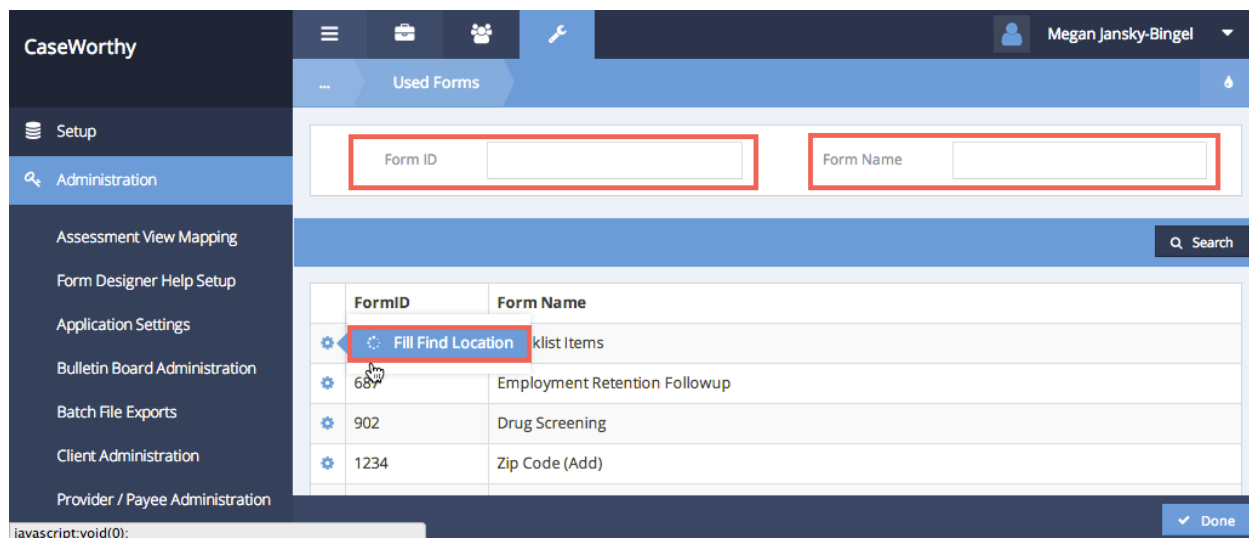


Active Forms and View Form Location

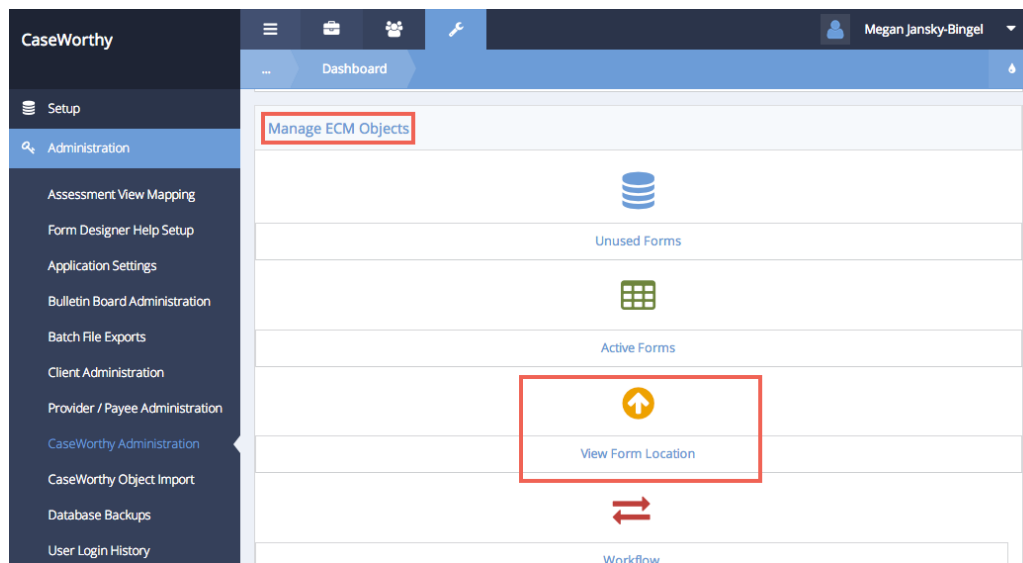
To view a list of all areas within the system where a form is linked, first click on the “Active Forms” icon.



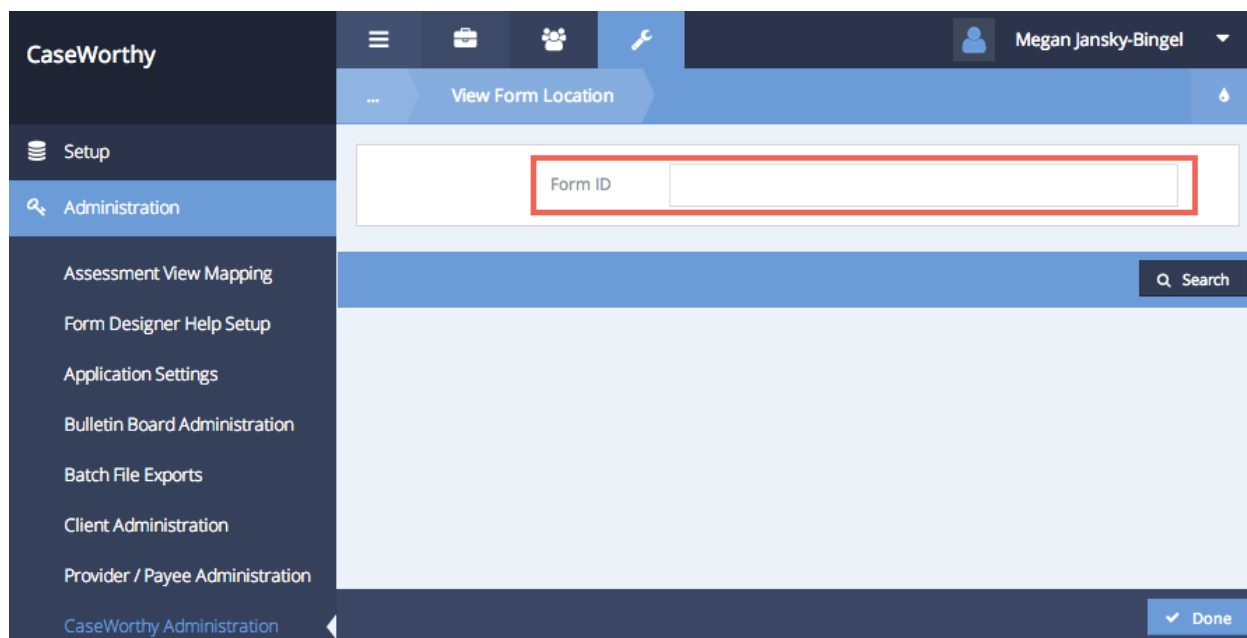
Enter the form number for the form being researched and click the **Search** button.



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 Q Search button. The form now displays the location and click-path for every place within the system that the form is available.

CaseWorthy

View Form Location

Form ID

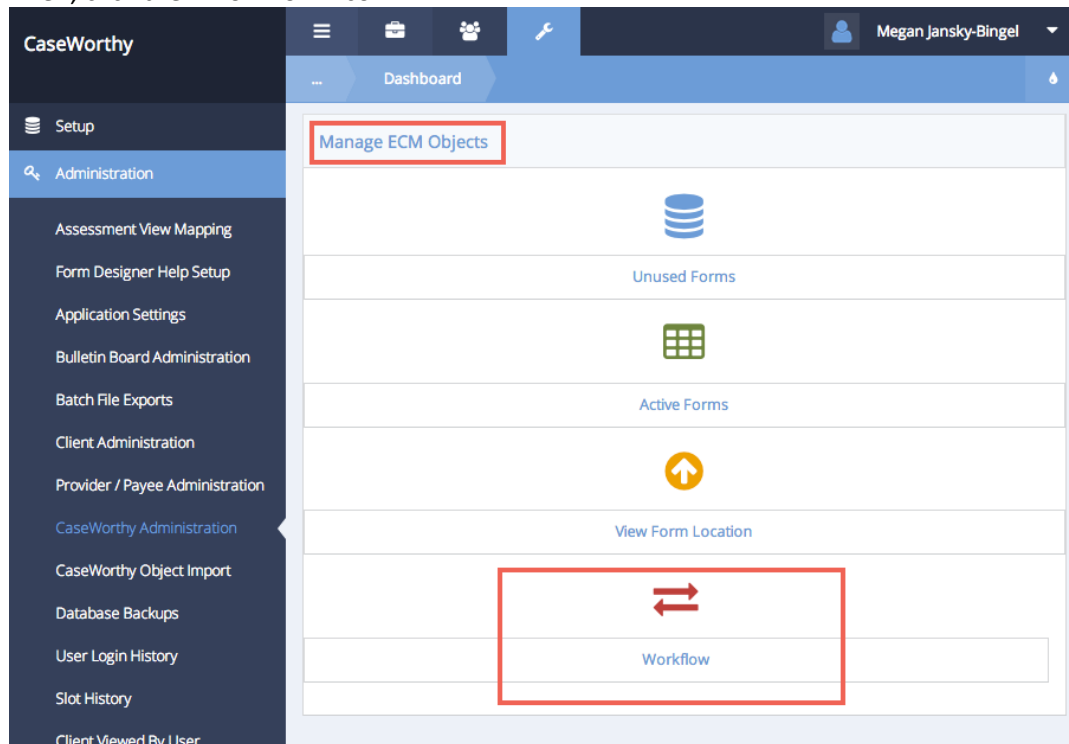
Search


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

		Created Date	Created By	Workflow ID
⚙	✎ Edit	7/31/2014	Gummadapu	199
⚙	🗑 Delete Workflow	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

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

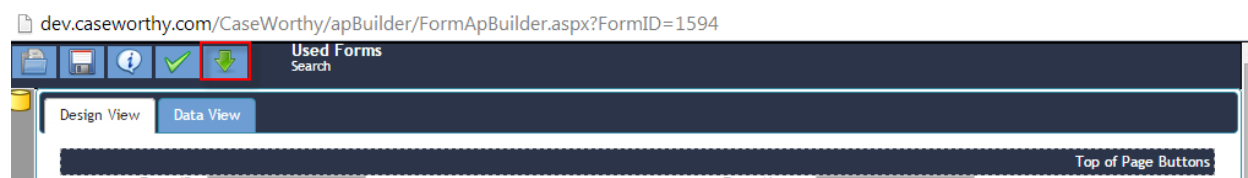
Done

CaseWorthy Object Import

(Administration>Administration>CaseWorthy Object Import)

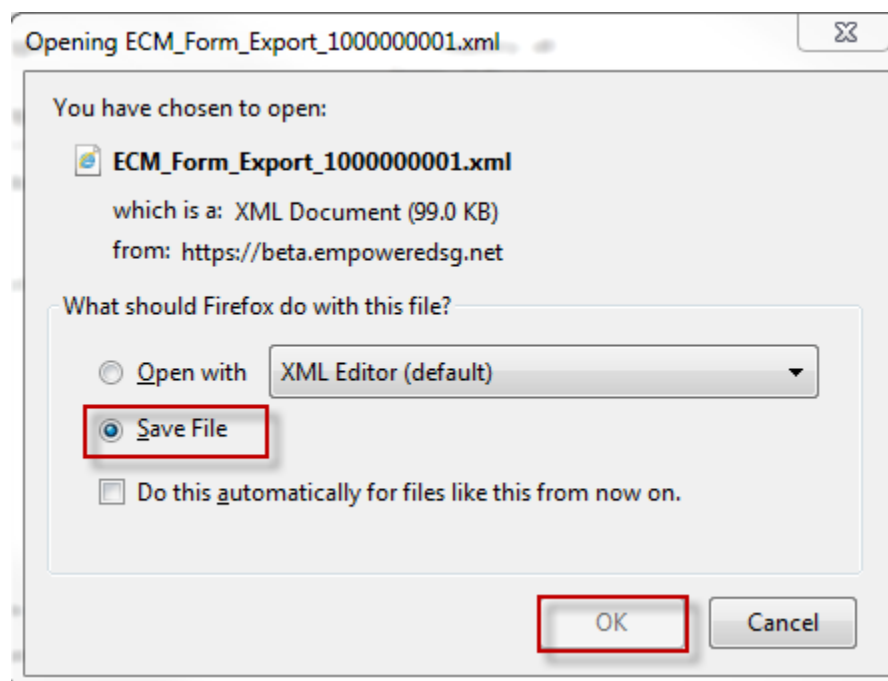
This area allows system administrators to import forms from other databases. New forms may be created, or existing forms, significantly changed in a Train or Test database, can be imported. Rather than rebuilding or recreating the changes, this feature brings the form into the current database and automatically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

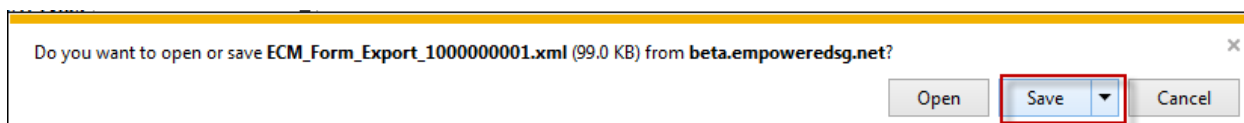


When prompted, save the file to the defaulted “downloads folder” location.

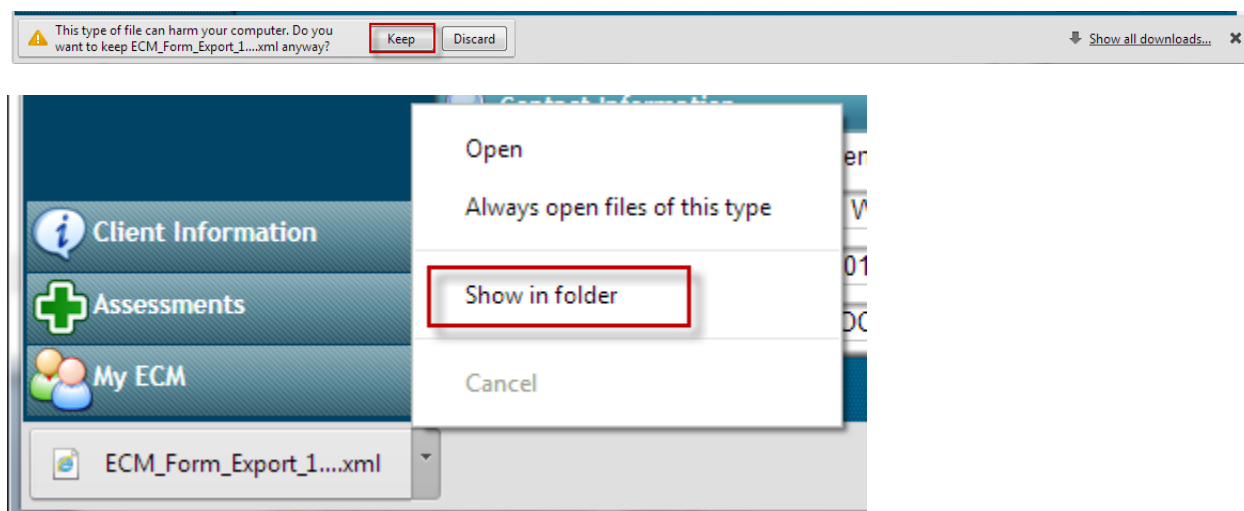
Firefox:




IE9:

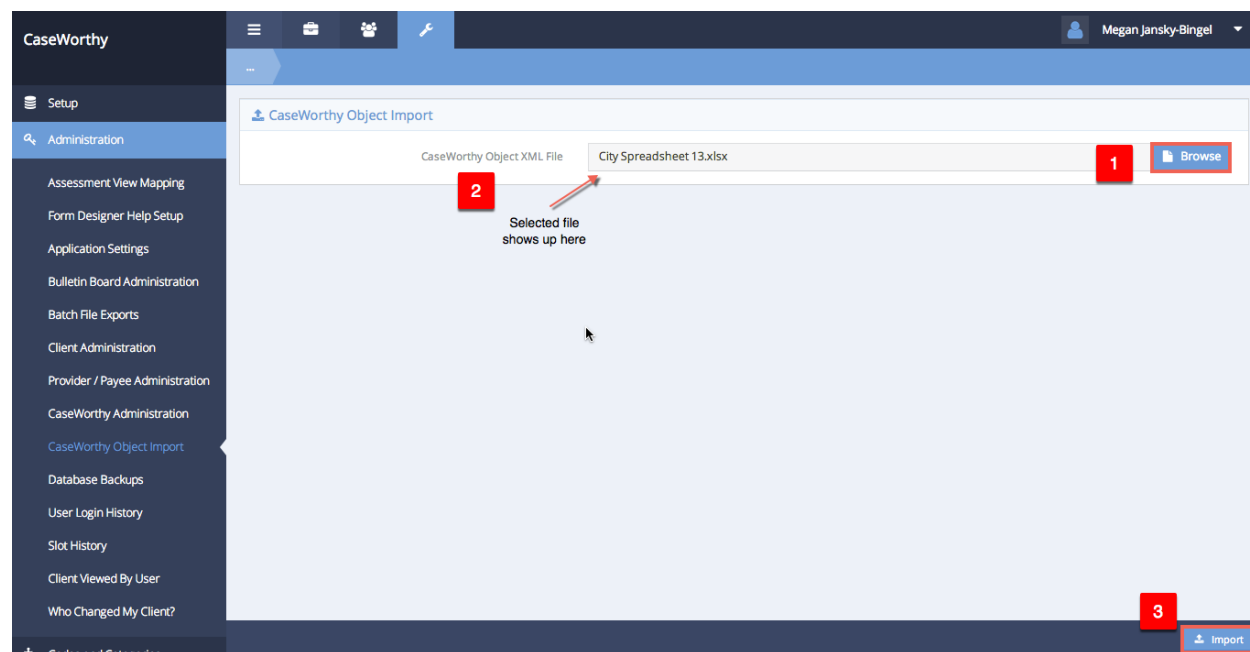


Chrome:



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  Import button on the bottom of the screen.




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

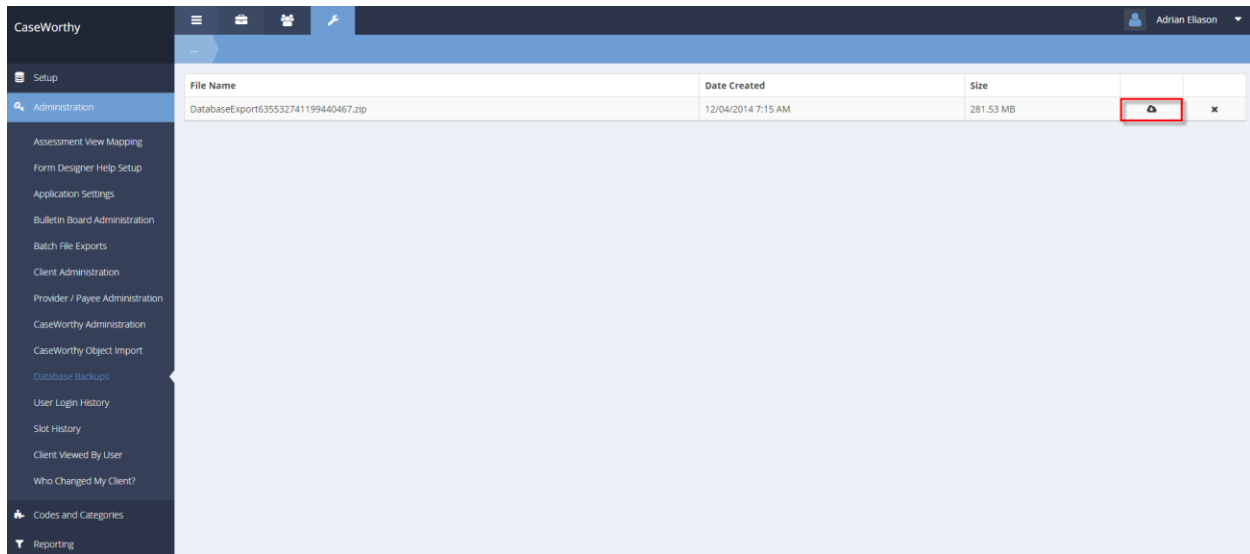
Database Backups

(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.

Export HUD CSV

Scheduled Reports

Save Report Parameters

Edit Save

Select the report criteria.

Grant Begin Date *

Report Begin Date *

Report End Date *

Organization(s) * All Some

Program(s) * All Some

Providers(s) * All Some

CSV Export Done

Enter information into required fields: Grant Begin Date, Report Begin Date, Report End Date, Organization, Program(s), and Provider(s). Click the **CSV Export** button to export form. An informational pop-up box appears, click ok.


Your CSV file has been queued and will be available to download on your Administration area in about 10 to 20 minutes.

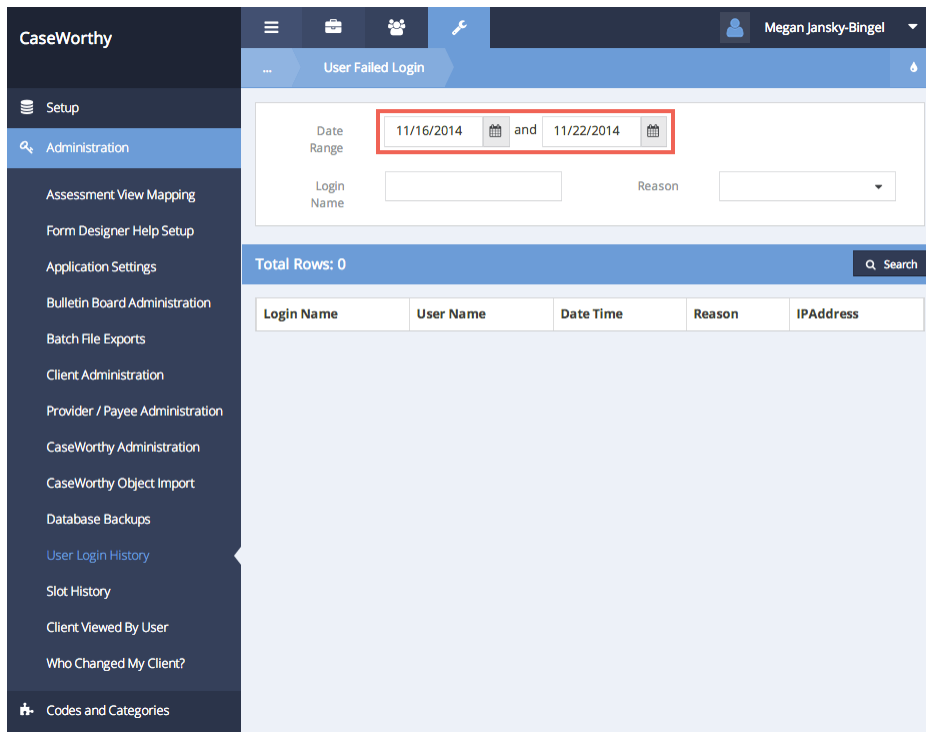
OK

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  button.



The screenshot displays the CaseWorthy system administrator interface. The left sidebar contains navigation links: 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 (highlighted), Slot History, Client Viewed By User, Who Changed My Client?, and Codes and Categories. The top navigation bar shows the user 'Megan Jansky-Bingel' and a 'User Failed Login' breadcrumb. The main content area features a 'Date Range' filter with a red box around the date range '11/16/2014' and '11/22/2014'. Below the filter, there are input fields for 'Login Name' and 'Reason'. A 'Total Rows: 0' indicator is present above a table with the following columns: Login Name, User Name, Date Time, Reason, and IPAddress. A search button is located in the top right corner of the main content area.

The history displays in tabular form.

CaseWorthy

...

User Failed Login

Megan Jansky-Blingel

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.

CaseWorthy Slot History Summary

ResourceName	SlotID	SlotName	SlotStatus	SlotTypeID	Begin Date
SOH Facility	1106	KA Test	Available		11/10/2014
SOH Facility	843	26	Available	Chronic Homeless	11/4/2014
Manor Emergency Housing	1121	bed115	Available	Chronic Homeless	11/4/2014
	1414	Slot	Available		11/4/2014
	2589	Slot	Available		11/4/2014
	2590	Slot	Available		11/4/2014
SOH Facility	807	15	Available		10/28/2014
SOH Facility	806	16	Available	Senior	10/28/2014
SOH Facility	805	17	Available		10/28/2014
SOH Facility	804	18	Available		10/28/2014
Manor Emergency Housing	1375	Bunk Bed7	Available	Chronic Homeless	10/28/2014
Manor Emergency Housing	1376	Bunk Bed6	Available	Chronic Homeless	10/28/2014
Manor Emergency Housing	1323	Bunk Bed7	Available	Chronic Homeless	10/28/2014
Manor Emergency Housing	2490	Bunk Bed	Available	Chronic Homeless	10/28/2014
Manor Emergency Housing	1427	Bunk Bed1	Available	Chronic Homeless	10/28/2014
Manor Emergency Housing	629	ES Bed 10	Available	Chronic Homeless	10/28/2014
Manor Emergency Housing	630	ES Bed 11	Available	Medical	10/28/2014

Left Sidebar: 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?


Bottom: Codes and Categories, Done

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.

Client	User Name	Viewed Date and Time
Test, Jane140	Jane1	1/21/2015 8:04:00 AM
Test, Jane140	Jane1	1/21/2015 8:04:00 AM
Test, Jane140	Jane1	1/21/2015 8:04:00 AM
Test, Jane140	Jane1	1/21/2015 8:03:00 AM
Test, Jane140	Jane1	1/21/2015 8:03:00 AM
Test, Jane140	Jane1	1/21/2015 8:02:00 AM
Test, Jane140	Jane1	1/21/2015 8:02:00 AM
Test, Jane140	Jane1	1/21/2015 8:01:00 AM
Test, Jane140	Jane1	1/21/2015 8:01:00 AM
Test, Jane140	Jane1	1/21/2015 8:01:00 AM
Hood, Mister	cameron	1/20/2015 6:00:00 PM
Hood, Mister	cameron	1/20/2015 6:00:00 PM
Hood, Mister	cameron	1/20/2015 5:59:00 PM
Hood, Mister	cameron	1/20/2015 5:59:00 PM
Hood, Mister	cameron	1/20/2015 5:59:00 PM
Hood, Mister	cameron	1/20/2015 5:59:00 PM
Hood, Mister	cameron	1/20/2015 5:57:00 PM

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

Client	User Name	Viewed Date and Time
Test, Jane140	Jane1	1/21/2015 8:04:00 AM
Test, Jane140	Jane1	1/21/2015 8:04:00 AM
Test, Jane140	Jane1	1/21/2015 8:04:00 AM
Test, Jane140	Jane1	1/21/2015 8:03:00 AM
Test, Jane140	Jane1	1/21/2015 8:03:00 AM

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.

Find Client Lookup

+

Add New

+

Quick Add New

Last Name

cliente


First Name

SSN

Birth Date

Client ID

Last Name	First Name	SSN	Birth Date	Client ID	Relation To HoH
Cliente	Nuevo	XXX-XX-9825	4/1/1949	9634	Self
Cliente	Maria	XXX-XX-2531	5/2/1949	8145	Spouse

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

...

Client Viewed by User

Client

Cliente, Nuevo


Q

User Name

Q

Q Search

Client	User Name	Viewed Date and Time
Test, jane140	jane1	1/21/2015 8:04:00 AM
Test, jane140	jane1	1/21/2015 8:04:00 AM
Test, jane140	jane1	1/21/2015 8:04:00 AM

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.

Select Users Lookup

User Name Organization

User Name	Last Name	Organization	User ID	First Name
120Vojane	Vol, Jane120	CaseWorthy	4243	Jane120
aabbott	Abbott, Andrew	CaseWorthy	9855	Andrew
Administrator	, Administrator	CaseWorthy	11	Administrator
Adult Fiscal			1930	
aellason	Ellason, Adrian	CaseWorthy	9632	Adrian
Alexcc	Maurer, Alex	Catholic Charities	2489	Alex
alexking	maurer, alex	Kingswood CAP	2638	alex
Alexm	maurer, alex	CaseWorthy	2040	alex

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

...

Client Viewed by User

Client

Cliente, Nuevo

Q

User Name

aellason

Q

Q Search


Client	User Name	Viewed Date and Time
Cliente, Nuevo	aellason	12/18/2014 8:41:00 AM
Cliente, Nuevo	aellason	12/18/2014 8:41:00 AM
Cliente, Nuevo	aellason	12/18/2014 8:41:00 AM

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.

CaseWorthy		Adrian Elason			
Who Changed My Client		Affected Entity Name <input type="text"/>			
Total Rows: 1000		Search			
Affected By Username	Affected Entity Name	Form Label	Old Value	New Value	Date and Time Of Change
kallen	FinancialAssessment, Man	Birth Date	11/11/1911	11/01/2000	1/21/2015 8:28 AM
msiple	Dad, CSBG Report	First Name		CSBG Report	1/16/2015 9:58 AM
msiple	Dad, CSBG Report	Birth Date		01/01/1930	1/16/2015 9:58 AM
msiple	Dad, CSBG Report	SSN		555-55-5555	1/16/2015 9:58 AM
msiple	Dad, CSBG Report	Gender		Male	1/16/2015 9:58 AM
msiple	Dad, CSBG Report	Ethnicity		Non-Hispanic or Latino	1/16/2015 9:58 AM
kallen	Hood, Mister	First Name		Mister	1/16/2015 7:29 AM
kallen	Hood, Mister	Birth Date		01/01/1950	1/16/2015 7:29 AM
kallen	Hood, Mister	SSN		111-11-1111	1/16/2015 7:29 AM
kallen	Hood, Mister	Gender		Male	1/16/2015 7:29 AM
kallen	Hood, Mister	Ethnicity		Non-Hispanic or Latino	1/16/2015 7:29 AM
kallen	Test, Matt	Birth Date	12/01/1970	12/01/2000	1/15/2015 3:43 PM
tseay	Asner, Ed	First Name		Ed	1/15/2015 2:03 PM
tseay	Asner, Ed	Birth Date		04/01/1958	1/15/2015 2:03 PM
tseay	Asner, Ed	SSN		987-65-4321	1/15/2015 2:03 PM
tseay	Asner, Ed	Gender		Male	1/15/2015 2:03 PM

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

Who Changed My Client		Affected Entity Name <input type="text"/>			
Total Rows: 1000		Search			
Affected By Username	Affected Entity Name	Form Label	Old Value	New Value	Date and Time Of Change
kallen	FinancialAssessment, Man	Birth Date	11/11/1911	11/01/2000	1/21/2015 8:28 AM
msiple	Dad, CSBG Report	First Name		CSBG Report	1/16/2015 9:58 AM
msiple	Dad, CSBG Report	Birth Date		01/01/1930	1/16/2015 9:58 AM
msiple	Dad, CSBG Report	SSN		555-55-5555	1/16/2015 9:58 AM
msiple	Dad, CSBG Report	Gender		Male	1/16/2015 9:58 AM

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

Find Client Lookup		Add New Quick Add New	
Last Name	<input type="text"/>	First Name	<input type="text"/>
SSN	<input type="text"/>	Birth Date	<input type="text"/>
		Client ID	<input type="text"/>
		Search	

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

Find Client Lookup

◆ Add New

◆ Quick Add New

Last Name

cliente

First Name

SSN

Birth Date

Client ID

Last Name	First Name	SSN	Birth Date	Client ID	Relation To HoH
cliente	Nuevo	XXX-XX-9825	4/1/1949	9634	Self
Cliente	Maria	XXX-XX-2531	5/2/1949	8145	Spouse

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

Who Changed My Client

Affected Entity Name

Cliente, Nuevo

Q

Total Rows: 10

Q Search

Affected By Username	Affected Entity Name	Form Label	Old Value	New Value	Date and Time Of Change
aeliason	Cliente, Nuevo	First Name		Test	12/19/2014 10:01 AM
aeliason	Cliente, Nuevo	Birth Date		01/11/1971	12/19/2014 10:01 AM
aeliason	Cliente, Nuevo	SSN		111-11-1112	12/19/2014 10:01 AM
aeliason	Cliente, Nuevo	Gender		Male	12/19/2014 10:01 AM
aeliason	Cliente, Nuevo	Ethnicity		Non-Hispanic or Latino	12/19/2014 10:01 AM
dseay	Cliente, Nuevo	First Name		Nuevo	8/25/2014 1:38 PM
dseay	Cliente, Nuevo	Birth Date		04/01/1949	8/25/2014 1:38 PM
dseay	Cliente, Nuevo	SSN		469-78-5132	8/25/2014 1:38 PM
dseay	Cliente, Nuevo	Gender		Male	8/25/2014 1:38 PM
dseay	Cliente, Nuevo	Ethnicity		Hispanic or Latino	8/25/2014 1:38 PM

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.

Help	Property Name	Add/Edit Help
	Allow Select All	+ Add
	Auto Search	+ Add
	Calendar Default View	+ Add
	Calendar Time Slot	+ Add
	Data Label Column	+ Add
	Designer	+ Add
	Disable Parameters	+ Add
	Display Rows Count	+ Add
	End Date Time Column	+ Add
	Event Label Format	+ Add
	Event Stored Procedure	+ Add
	Event Tooltip Format	+ Add
	First Day of Week	+ Add
	Follow-Ups Control	+ Add
	Form Help	+ Add

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.


Help	Property Name	Add/Edit Help
	Icon	+ Add
	Validation	+ Add
	Link	+ Add
	Open Popup	+ Add
	Action	+ Add
	Number of Add Rows	+ Add
	Save And Add Row	+ Add
	Stored Procedure	+ Add

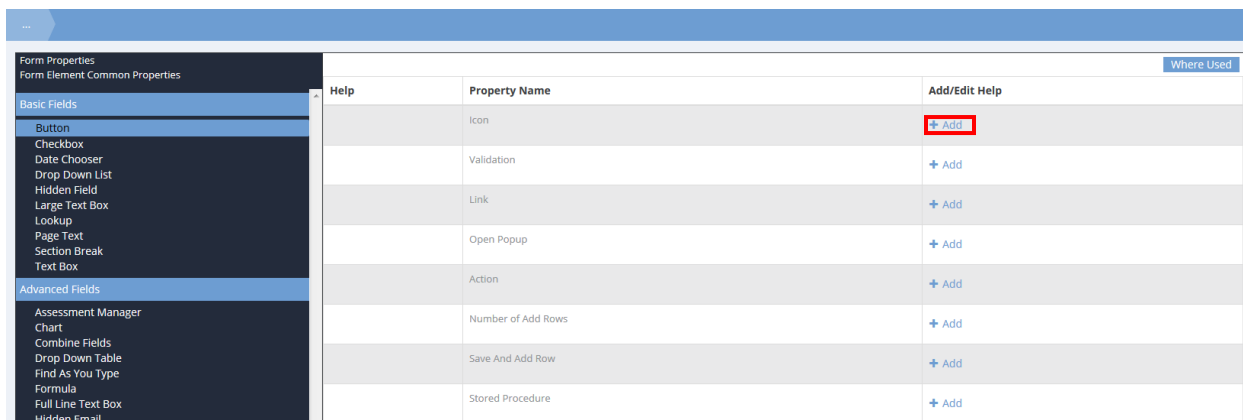
Click **Cancel** to return to the Form Designer Help Setup form.









Where Used

Role 2 > Find Client > Find Client > Add New
 Role 2 > Find Client > Find Client > Search
 Role 2 > Find Client > Find Client > Quick Add New
 Role 152 > Add/Edit Users > Record Time > Save
 Role 152 > Add/Edit Users > Record Time > Cancel

Cancel

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



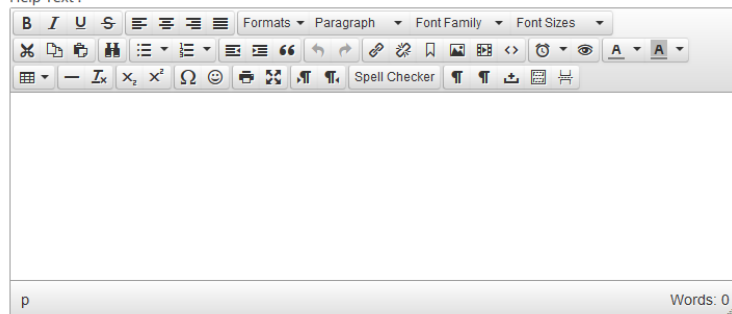
Help	Property Name	Add/Edit Help
	Icon	
	Validation	
	Link	
	Open Popup	
	Action	
	Number of Add Rows	
	Save And Add Row	
	Stored Procedure	



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


Element Property Help Editor

☐ Video ☒ Text ☐ Video and Text

Help 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  when done. The Form Designer Help Setup form displays.

Element Property Help Editor

☐ Video ☐ Text ☒ Video and Text

YouTube Code :*


Help Text :*


The screenshot shows the 'Element Property Help Editor' window. At the top, there are radio buttons for 'Video', 'Text', and 'Video and Text', with 'Video and Text' selected. Below this is a 'YouTube Code :*' field. The main area is labeled 'Help Text :*' and contains a large text editor with a rich text toolbar. The toolbar includes buttons for bold, italic, underline, strikethrough, text color, background color, bulleted list, numbered list, indent, outdent, link, unlink, image, video, code, undo, redo, and a spell checker. The text editor area is currently empty. At the bottom left of the editor is a 'p' icon, and at the bottom right is a 'Words: 0' counter.

Save Cancel

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

The screenshot shows the 'Element Property Help Editor' window with the 'Help' tab selected. On the left is a sidebar with a tree view containing 'Form Properties', 'Form Element Common Properties', and 'Basic Fields'. The 'Basic Fields' folder is expanded, showing a list of form elements: Button, Checkbox, Date Chooser, Drop Down List, Hidden Field, Large Text Box, Lookup, Page Text, and Section Break. The 'Checkbox' element is selected. The main area displays a table with three columns: 'Help', 'Property Name', and 'Add/Edit Help'. The table contains four rows of data. The third row, for 'Text Align', has a red box around the 'Edit' button in the 'Add/Edit Help' column.

Help	Property Name	Add/Edit Help
	If false, skip table	+ Add
	Show Yes/No	+ Add
?	Text Align	 Edit
	Null is false	+ Add

Make any desired changes and click  **Save** when done.

Element Property Help Editor

☐ Video ☒ Text ☐ Video and Text

Help Text :*

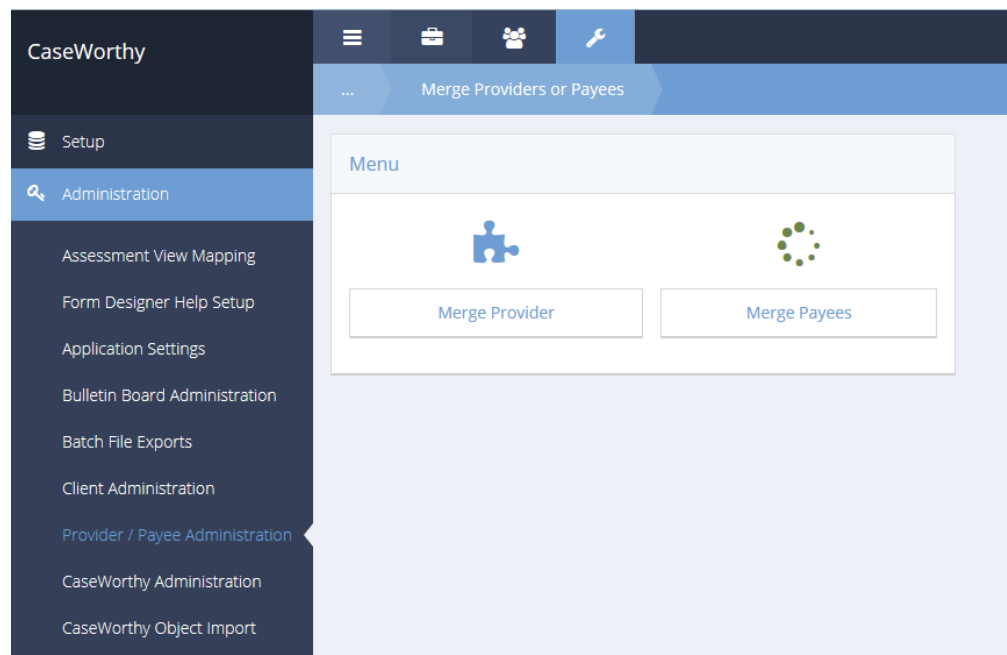
The screenshot shows the 'Element Property Help Editor' window with the 'Text' radio button selected. The 'Help Text :*' field now contains the text: 'Text Align options include "Right Align" and "Left Align".' The rich text toolbar is visible above the text area. At the bottom left is a 'p' icon, and at the bottom right is a 'Words: 9' counter.

Save Cancel

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 screenshot shows the 'Merge Providers' form. At the top is a blue header with a hamburger menu icon, the text 'Merge Providers', and a small blue icon. Below the header is a light blue box containing a warning message: 'Using this form merges "Provider A" and "Provider B" below. "Provider B" will be the surviving record and will take ownership of all transactions, etc of "Provider A".' Below the message are four input fields arranged in two rows. The first row has 'Provider A' and 'Provider A ID'. The second row has 'Provider B' and 'Provider B ID'. Each of the four input fields has a magnifying glass icon to its right, which is highlighted with a red square.

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

Select Providers Lookup

Provider Name

Address, City, State, Zip


Search


Provider Name	Address, City, State, Zip
456yujik	
45rtyhj	
4r 876yt	
Adrian's Bistro	123 Main Street, TX, AUSTIN, TX 78745
Adrian's Bistro	133 Elm Street, UT, Salt Lake City 84107
Appalachian Regional Coalition on Homelessness	56 South 800 West, UT, Salt Lake City 84104
Apple Computers - Real	123 S. Main St., NY, NEW YORK 10008
asdfhn	
asdfghb	
Auto Zone	
Banner Health	1441 N. 12th Street, AZ, PHOENIX 85006

Once the desired providers have been selected, click the  button.

... Merge Providers



Using this form merges "Provider A" and "Provider B" below. "Provider B" will be the surviving record and will take ownership of all transactions, etc of "Provider A".

Provider A 


Provider B 

Provider A ID

Provider B ID


 

Merge Payees

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


... Merge Payees

This is the payee that is being merged "FROM" the payee list. This payee that will be "REMOVED" from the database after the merge has been completed.



Payee Source (Merge From) 


Payee Name Source

This is the payee that the source payee is being merged "TO" in the payee list. This payee will be "REMAIN" in the database after the merge has been completed.

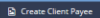
Payee Target (Merge To) 

Payee Name Target


 

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

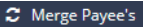
Provider Referral Other Search Lookup

 Add New  Create Client Payee

Name City
 State FEIN


 Search

Name	Address	City	State	FEIN	ReferralOtherID
Erica					209
Eric Test					208
Jane 1					207
Jane 1					206
Eric Cam					205
Jane & Eric Test					204


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



... Merge Payees

⚠ This is the payee that is being merged "FROM" the payee list. This payee that will be "REMOVED" from the database after the merge has been completed.

Payee Source (Merge From)  Payee Name Source

⚠ This is the payee that the source payee is being merged "TO" in the payee list. This payee will be "REMAIN" in the database after the merge has been completed.

Payee Target (Merge To)  Payee Name Target

 Merge Payee's  Cancel


Assessment View Mapping

(Administration>Administration>Assessment View Mapping)


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


CaseWorthy

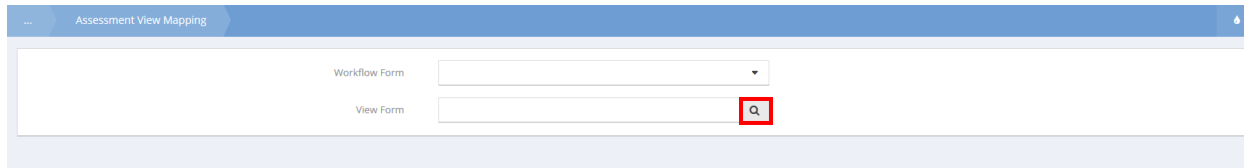
Adrian Ellason

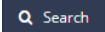
View Assessment Mapping Summary 

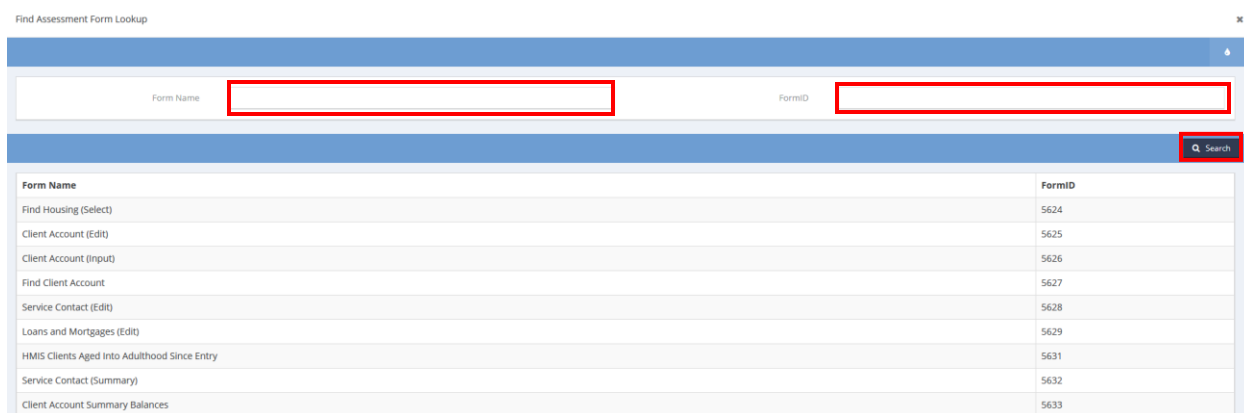
Workflow Form	View Form
Chronic Homelessness (Input)	3374
Assess Outcomes	3373
Cash Equiv. Assessment	3375
HUD Financial Assessment	580

 Save

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

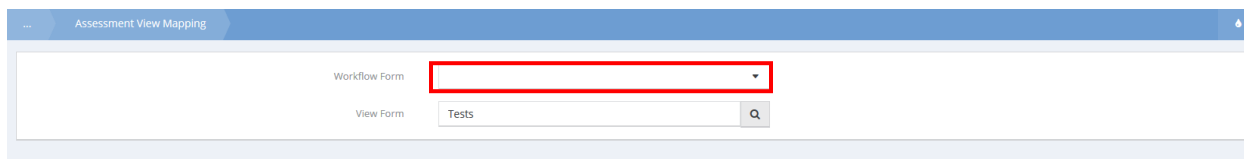



Enter a name or ID and click  to filter the list of forms. Click a form to select it. The Assessment View Mapping form displays.

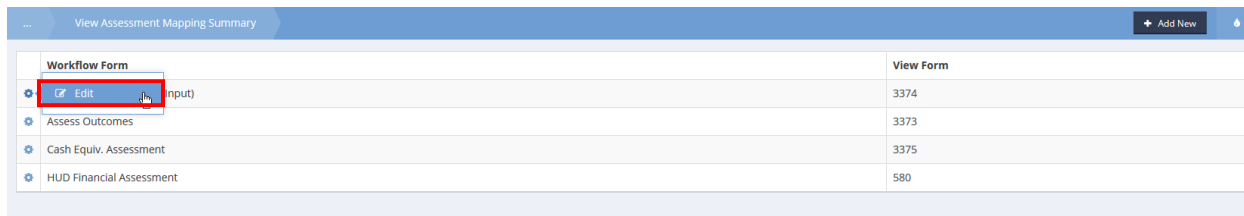







Form Name	FormID
Find Housing (Select)	5624
Client Account (Edit)	5625
Client Account (Input)	5626
Find Client Account	5627
Service Contact (Edit)	5628
Loans and Mortgages (Edit)	5629
HMIS Clients Aged Into Adulthood Since Entry	5631
Service Contact (Summary)	5632
Client Account Summary Balances	5633


Select a workflow form from the drop-down list. Click . 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.



Workflow Form	View Form
  Edit (input)	3374
 Assess Outcomes	3373
 Cash Equiv. Assessment	3375
 HUD Financial Assessment	580

Select the desired workflow form and view form and click .

... Assessment View Mapping

Workflow Form: Chronic Homelessness (Input)

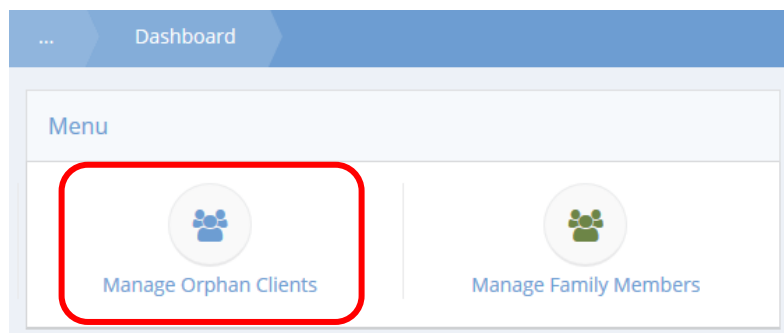
View Form: Self Sufficiency Matrix View Only

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.

... Admin Find Orphan Clients

Generate Family Records for All Orphan Clients

To create single person family records for all orphaned clients in the list, click on the Generate Family Records for All Orphan Clients button in the upper right corner of the form.
To create a record for a particular orphaned client, click on the Generate Family Record button on the row for that client.
To add a client to an existing family, navigate to the client record once the new, single person family is created.

Last Name: First Name/Alias: Client ID:
SSN: Birth Date:

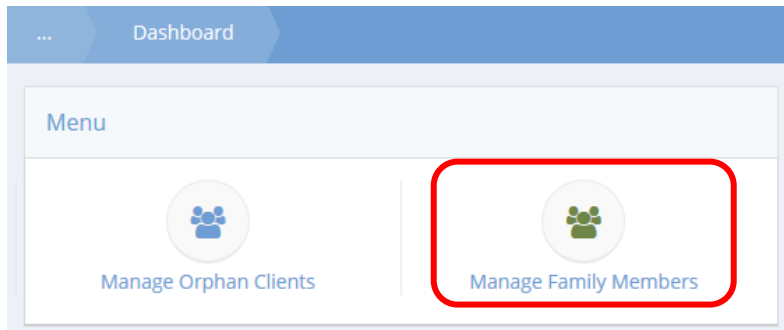
Total Rows: 5

Search

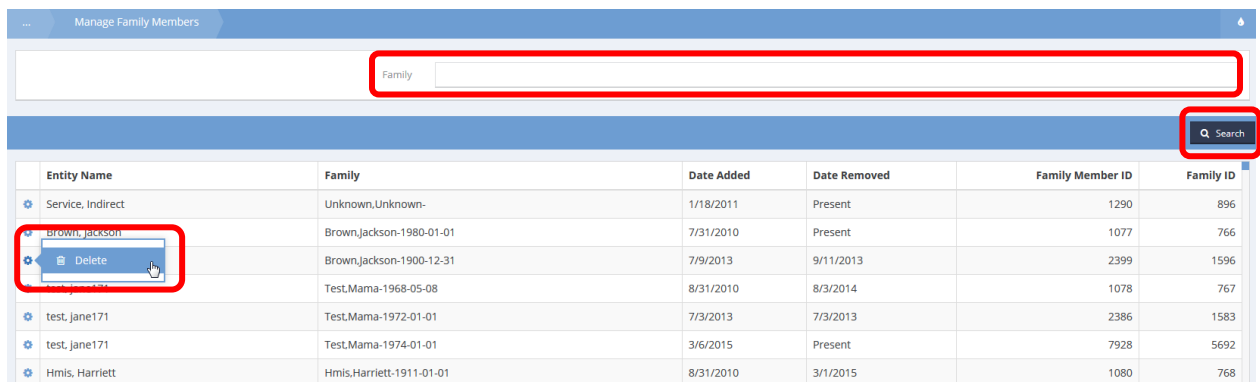
Last Name	First Name/Alias	Client ID	SSN	Birth Date	Date Removed	Removed	Generate Family Record
Test	Abigail	3644	XXX-XX-3243	2/5/1974	6/25/2015	Yes	Generate Family Record
Test	Abigail	3644	XXX-XX-3243	2/5/1974	6/25/2015	Yes	Generate Family Record
Test	Abigail	3644	XXX-XX-3243	2/5/1974	6/25/2015	Yes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

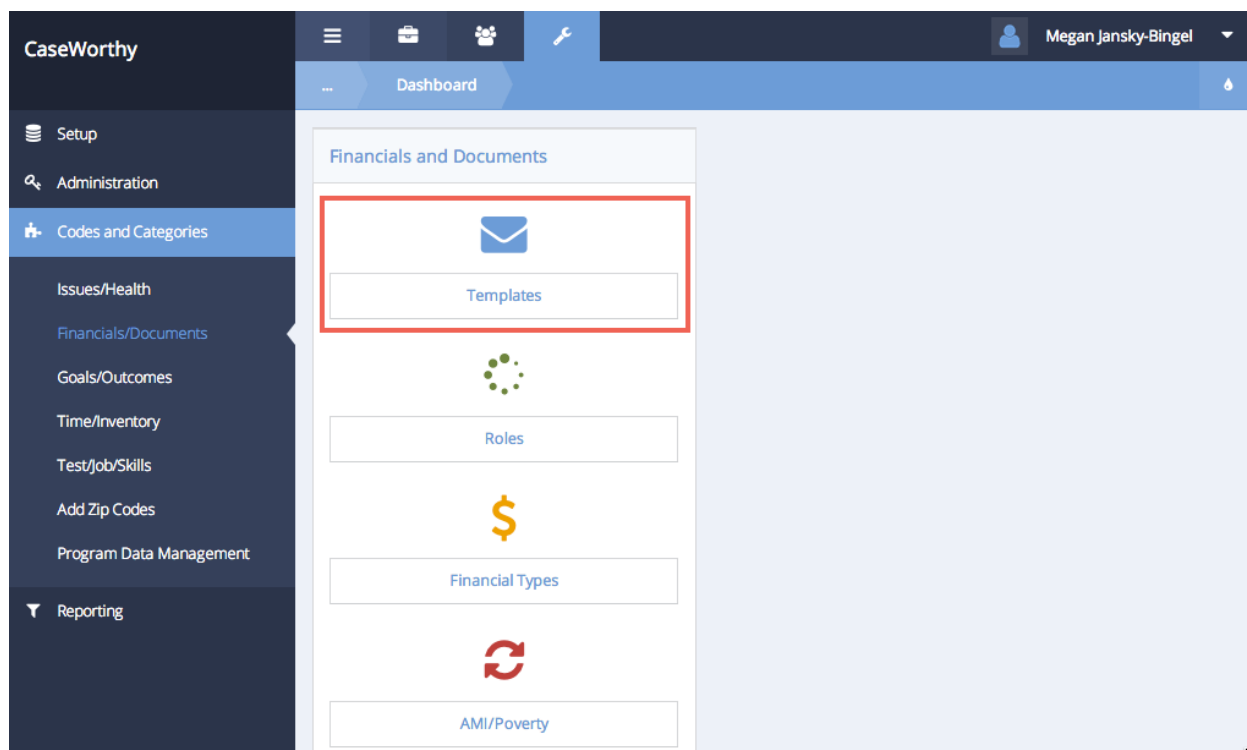
The Financials and Documents category area includes set up for Case Note Templates, Financial Types, Tax Table, Documents Type, Roles, AML/Poverty, Image Type and Fiscal Calendars.

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.

Subject	Type	Created Date	System ID
Email Application Thank You Note	Email Template	10/8/2014	71
Reservation Confirmation Email	Email Template	9/16/2014	69
Job Order Description	Client Case Note	3/14/2014	65
Case Note Preview Default	Client Case Note	2/12/2014	64
Missing Documents Template	Client Case Note	12/31/2013	61
Client Release Email dbates	Client Case Note	9/17/2013	58
Volunteer Acceptance Email Template	Email Template	9/17/2013	59
Issue Tracking	Email Template	9/3/2013	57
Team Training Template	Client Case Note	8/16/2013	56


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

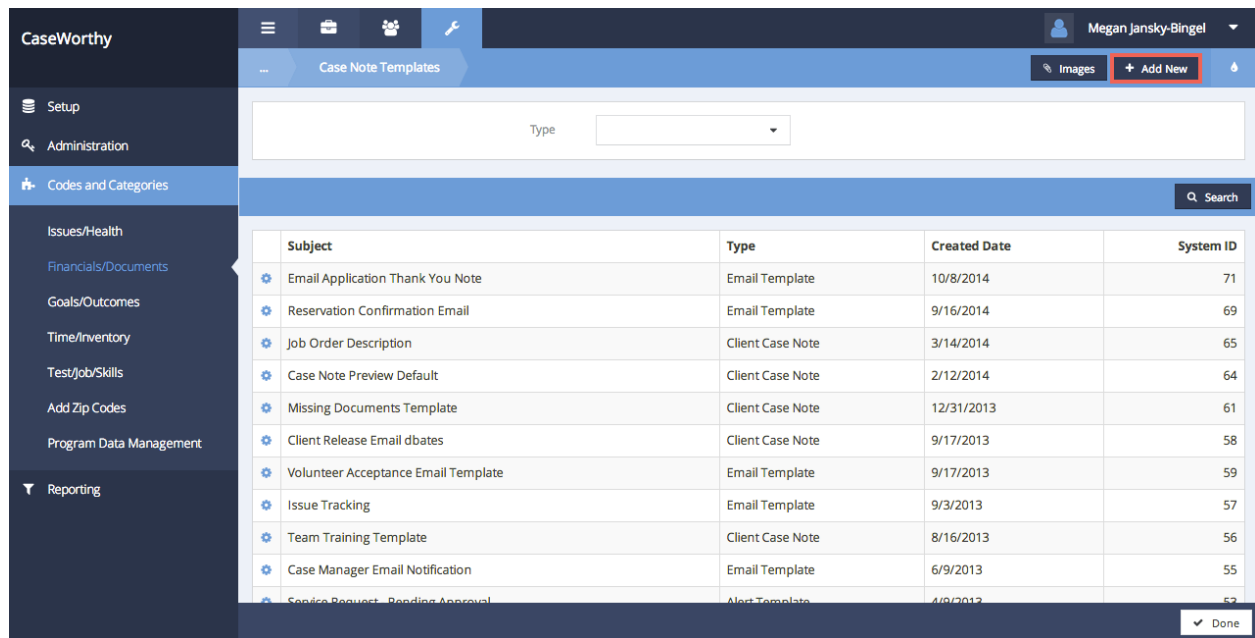
Label	File Name	Template Image ID
TestHeader	AlignEmailHeader.jpg	10
Head Start Logo	Head Start.jpg	12
CaseWorthy Logo	CaseWorthyLogo.png	13
Koala	Koala.jpg	14
grumpy	grumpy.jpg	15
CC Phoenix Logo	CCCS-color-trans.png	16
CC Phoenix Small Logo	CCCS blackSmall.jpg	17
		18
RS Logo		20
test		21
GW LOGO		23
Discover Goodwill		24
Goodwill Houston Logo	2013 GWH ECM logo.jpg	28


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.

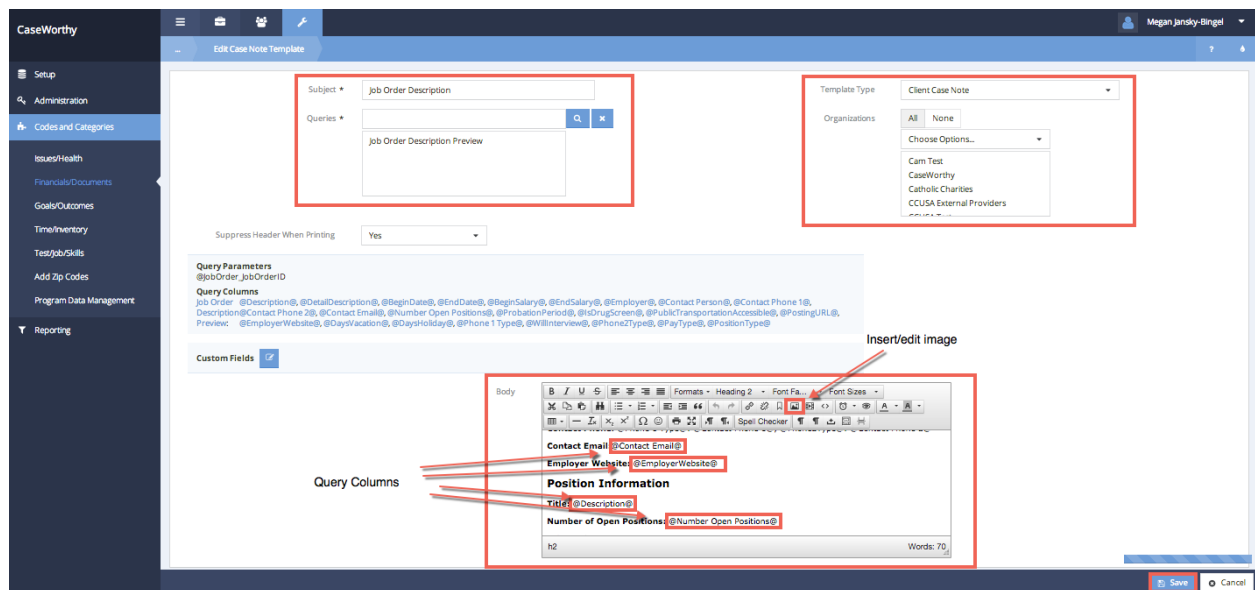
Back on the Case Note Image summary form, make note of the Template Image ID and click the  button.

Label	File Name	Template Image ID
TestHeader	AlignEmailHeader.jpg	10
Head Start Logo	Head Start.jpg	12
CaseWorthy Logo	CaseWorthyLogo.png	13
Koala	Koala.jpg	14
grumpy	grumpy.jpg	15
CC Phoenix Logo	CCCS-color-trans.png	16
CC Phoenix Small Logo	CCCS blackSmall.jpg	17
		18
RS Logo		20
test		21
GW LOGO		23
Discover Goodwill		24
Goodwill Houston Logo	2013 GWH ECM logo.jpg	28
Logo	adjs.jpg	30


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



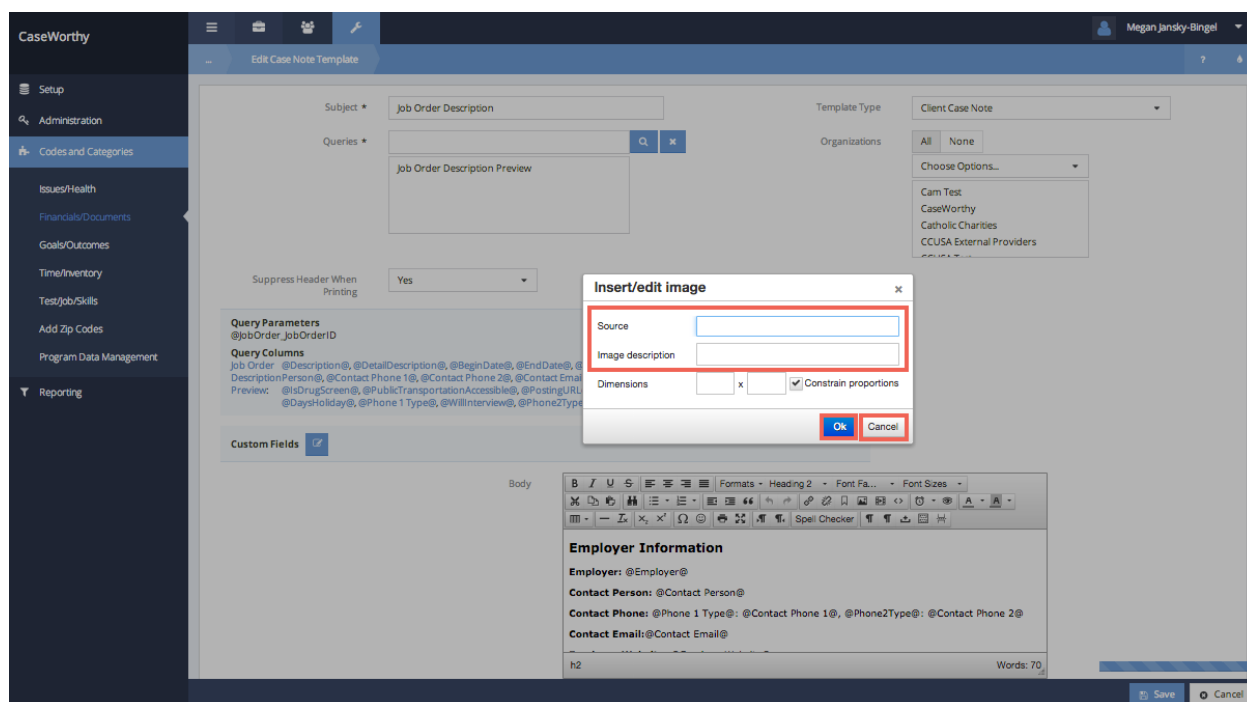
On the Edit Case Note Template form, enter the name for the template. Select the template type and the organizations that should have access to the template. Use the Queries field look up icon  to find and select the desired query or queries to use to parse default data (such as client data, like name, 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.



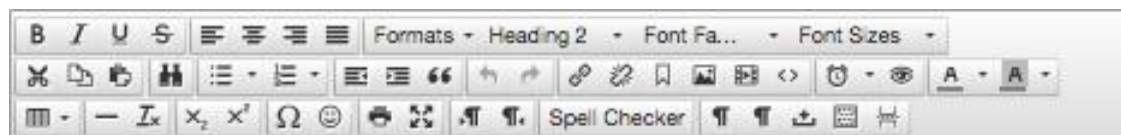
To populate the template with default data, simply drag and drop the desired query columns to the appropriate place in the document.

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”



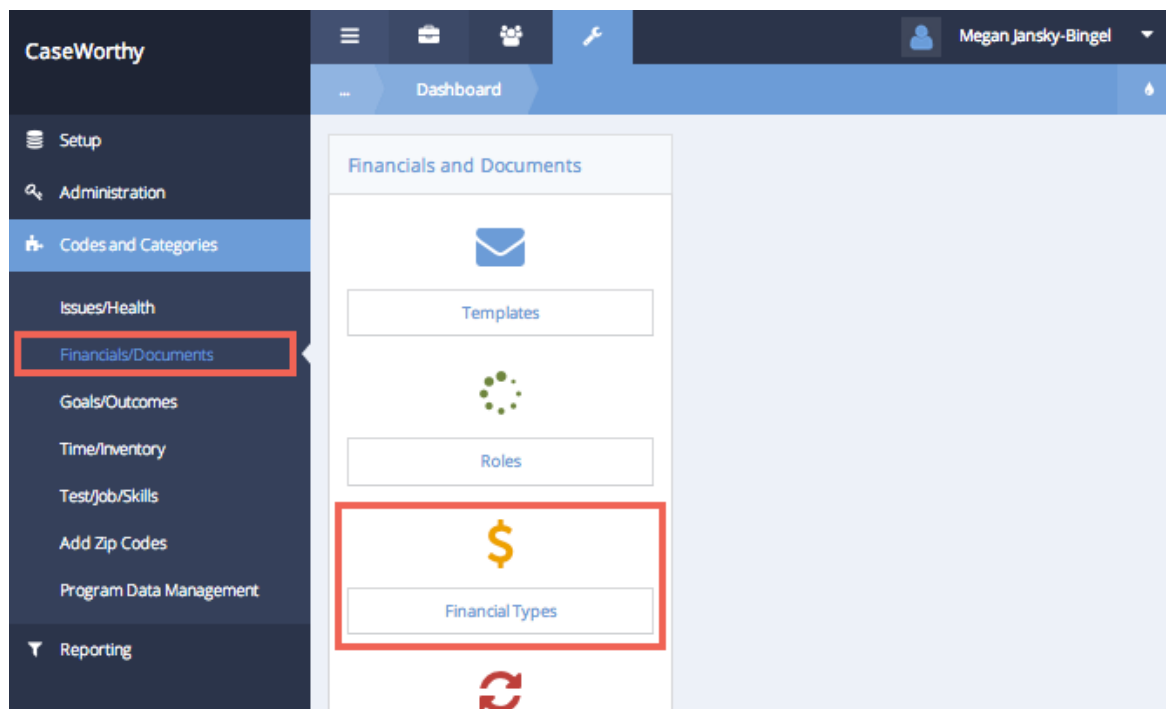
Use the options on the Rich Text Editor menu to center or justify text and/or images, as well as to format and otherwise edit the look and feel of the template.



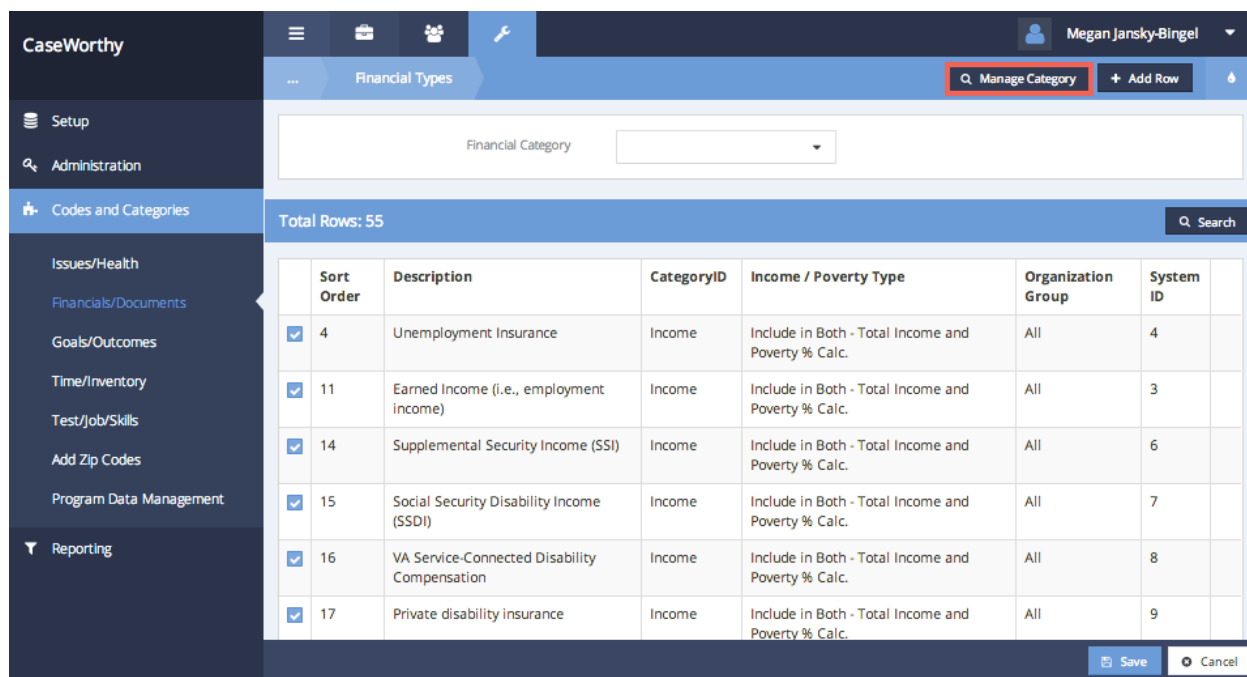
Financial Types

(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.

CaseWorthy

Megan Jansky-Bingel

Financial Type Category

+ Add Row

Financial Category	CategoryID
<input checked="" type="checkbox"/> New Financial Category	
<input checked="" type="checkbox"/> Cash Equivalents	3
<input checked="" type="checkbox"/> Expense	2
<input checked="" type="checkbox"/> Income	1

Save Cancel

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.

CaseWorthy

Megan Jansky-Bingel

Financial Types

Q Manage Category + Add Row

Financial Category

Total Rows: 55

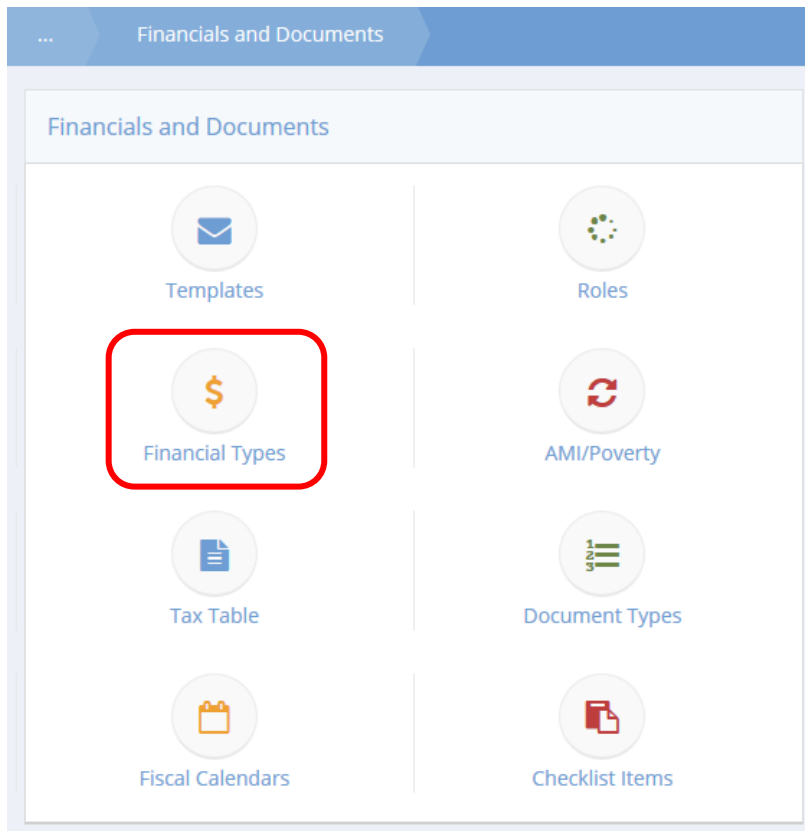
Search

Sort Order	Description	CategoryID	Income / Poverty Type	Organization Group	System ID
<input checked="" type="checkbox"/> 64	Life Insurance	Cash Equivalent	Include in Total Income On	All None Choose Options. CaseWorthy	
<input checked="" type="checkbox"/> 4	Unemployment Insurance	Income	Include in Both - Total Income and Poverty % Calc.	All	4
<input checked="" type="checkbox"/> 11	Earned Income (i.e., employment income)	Income	Include in Both - Total Income and Poverty % Calc.	All	3

Save Cancel

Financial SubCategory Types

(Administration>Codes and Categories>Financials and Documents)



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

Financial Description Category *

Total Rows: 263 Search

<input checked="" type="checkbox"/>	Description	Sort Order	Category *	Sub Category	Type ID
<input checked="" type="checkbox"/>	Mortgage Payment	1	Expense		114
<input checked="" type="checkbox"/>	Rent Payment	2	Expense		115
<input checked="" type="checkbox"/>	Home/Rental Insurance	2	Expense		75
<input checked="" type="checkbox"/>	Commissions	3			72
<input checked="" type="checkbox"/>	Property Taxes	3	Expense		73
<input checked="" type="checkbox"/>	Utilities - Garbage	4			76

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

Financial SubCategory Types

Total Rows: 23

Financial Category *	Sub-Category Description *
<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> Expense	Auto / Transportation
<input checked="" type="checkbox"/> Expense	Housing
<input checked="" type="checkbox"/> Expense	Children
<input checked="" type="checkbox"/> Expense	Continuing Education
<input checked="" type="checkbox"/> Expense	Insurance

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.

Financial Types

Manage Categories Manage Sub-Categories + Add Row **View Accounts**

Financial Description: Category:

Total Rows: 263

Description	Sort Order	Category *	Sub Category	Type ID
<input checked="" type="checkbox"/> Mortgage Payment	1	Expense		114
<input checked="" type="checkbox"/> Rent Payment	2	Expense		115
<input checked="" type="checkbox"/> Home/Rental Insurance	2	Expense		75
<input checked="" type="checkbox"/> Commissions	3			72
<input checked="" type="checkbox"/> Property Taxes	3	Expense		73

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

View Accounts

Financial Types

Description (Find As You Type): Category:

Total Rows: 263

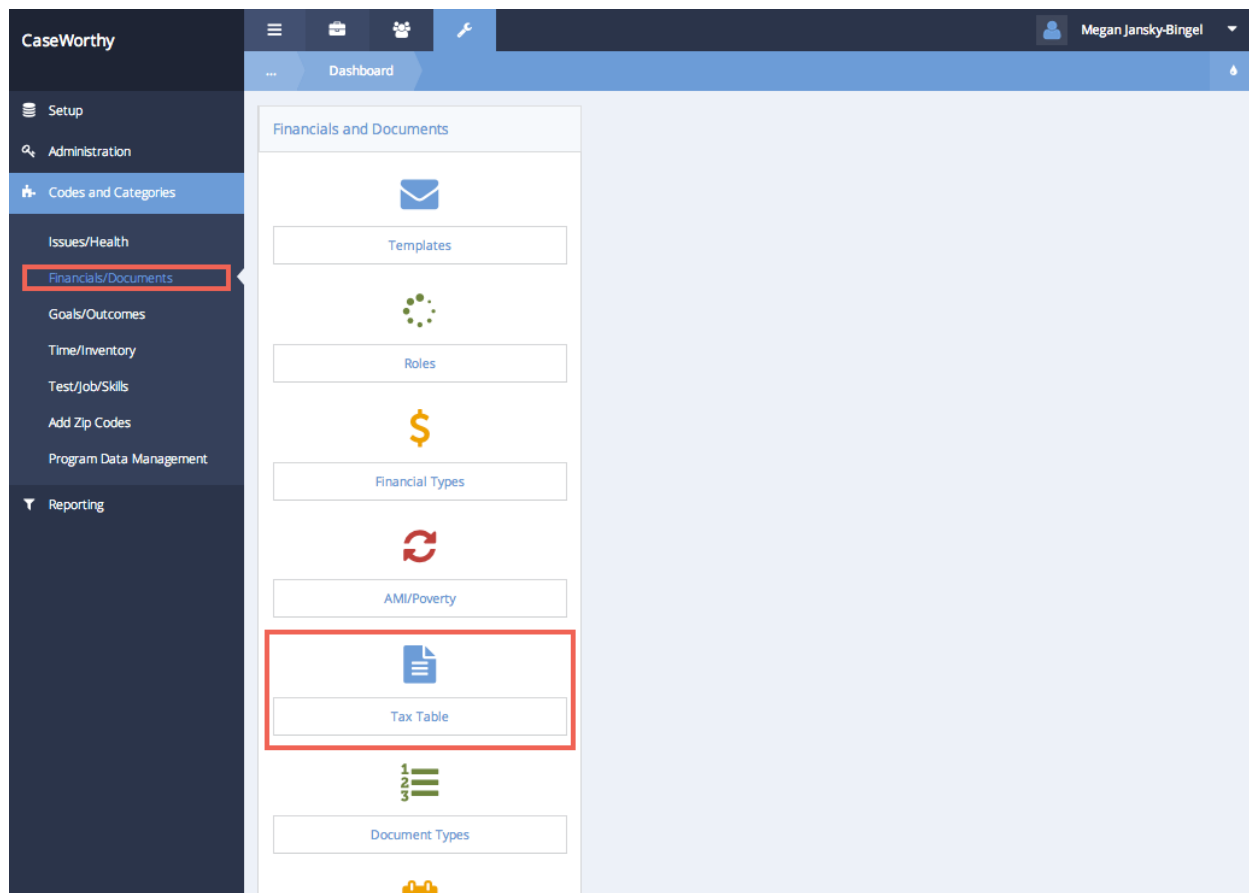
Description	Category *	Sub Category	Sort Order	Income / Poverty Type	Org Group	Type ID
<input checked="" type="checkbox"/> Mortgage Payment	Expense		1		All None	114
<input checked="" type="checkbox"/> Rent Payment	Expense		2	Not Applicable	Some	115
<input checked="" type="checkbox"/> Home/Rental Insurance	Expense		2	Not Applicable	Some	75
<input checked="" type="checkbox"/> Commissions			3	Include in Both - Total Income and Poverty % Calc.	None	72
<input checked="" type="checkbox"/> Property Taxes	Expense		3	Not Applicable	Some	73

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

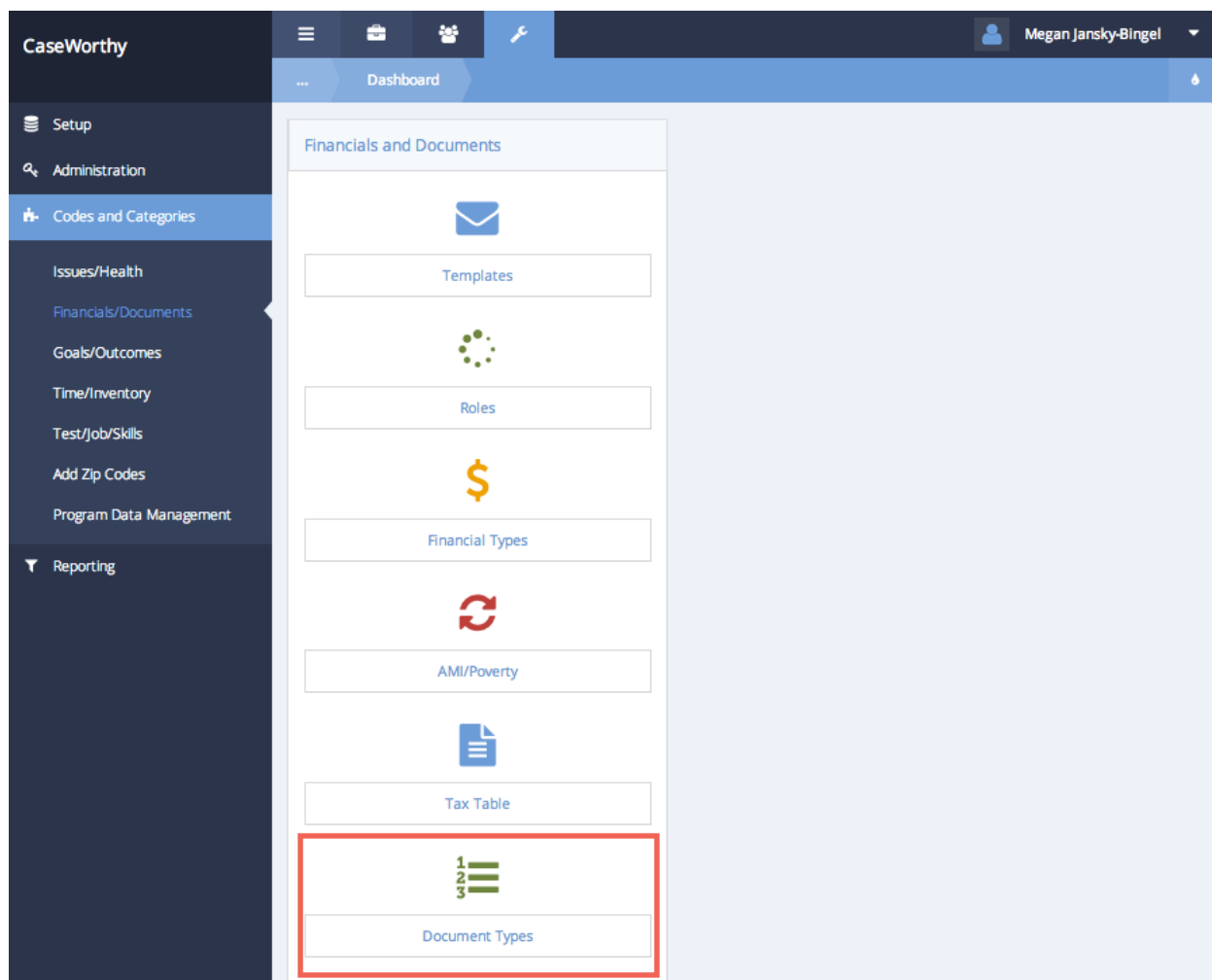
	Description *	City % *	County % *	State % *	Total %	
<input checked="" type="checkbox"/>	STL	1	1.25	5.25	7.5%	<input type="checkbox"/>
<div>Begin * 11/20/2014 <input type="text"/> End Date Present <input type="text"/> Organization * All None <input type="text"/></div> <div>Choose Options... <input type="text"/></div> <div>CaseWorthy <input type="text"/></div>						
<input checked="" type="checkbox"/>	SLC	1.125%	1.125%	4.75%	7%	<input type="checkbox"/>


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  **Manage Categories** button on the top right.

CaseWorthy

Megan Jansky-Bingel

Document Types

+ Manage Categories + Add Row

Description Type Category Search Choose Options...

Search

Type *	Sort Order	Category *	System ID
<input checked="" type="checkbox"/> Architect/Engineer Certification of Accessibility			14
<input checked="" type="checkbox"/> Bank Statement			39
<input checked="" type="checkbox"/> Bank Statement			39
<input checked="" type="checkbox"/> Billing History			43
<input checked="" type="checkbox"/> Birth Certificate			67
<input checked="" type="checkbox"/> Birth Certificate			67

Save Cancel

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.

Manage Categories

+ Add Row

Category Name

Search

Category Name	Document Category ID
<input checked="" type="checkbox"/> Education Certification	<input type="text"/>
<input checked="" type="checkbox"/> Checklist Items	7
<input checked="" type="checkbox"/> Client	2
<input checked="" type="checkbox"/> Document Check Item	8
<input checked="" type="checkbox"/> Domestic Violence	5
<input checked="" type="checkbox"/> Housing Contract	3
<input checked="" type="checkbox"/> Legal	1

Save Cancel

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

Setup

Administration

Codes and Categories

Issues/Health

Financials/Documents

Goals/Outcomes

Time/Inventory

Test/job/Skills

Add Zip Codes

Program Data Management

Reporting

Document Types

+ Manage Categories

+ Add Row

Description Type

Category Search

Choose Options...

Search

Type *	Sort Order	Category *	System ID
<input checked="" type="checkbox"/> Post-Secondary School Transcripts		<div>Choose Options...</div> <div>Education Certification</div>	
Document Category ID 1			
<input checked="" type="checkbox"/> Architect/Engineer Certification of Accessibility			14
<input checked="" type="checkbox"/> Bank Statement			39

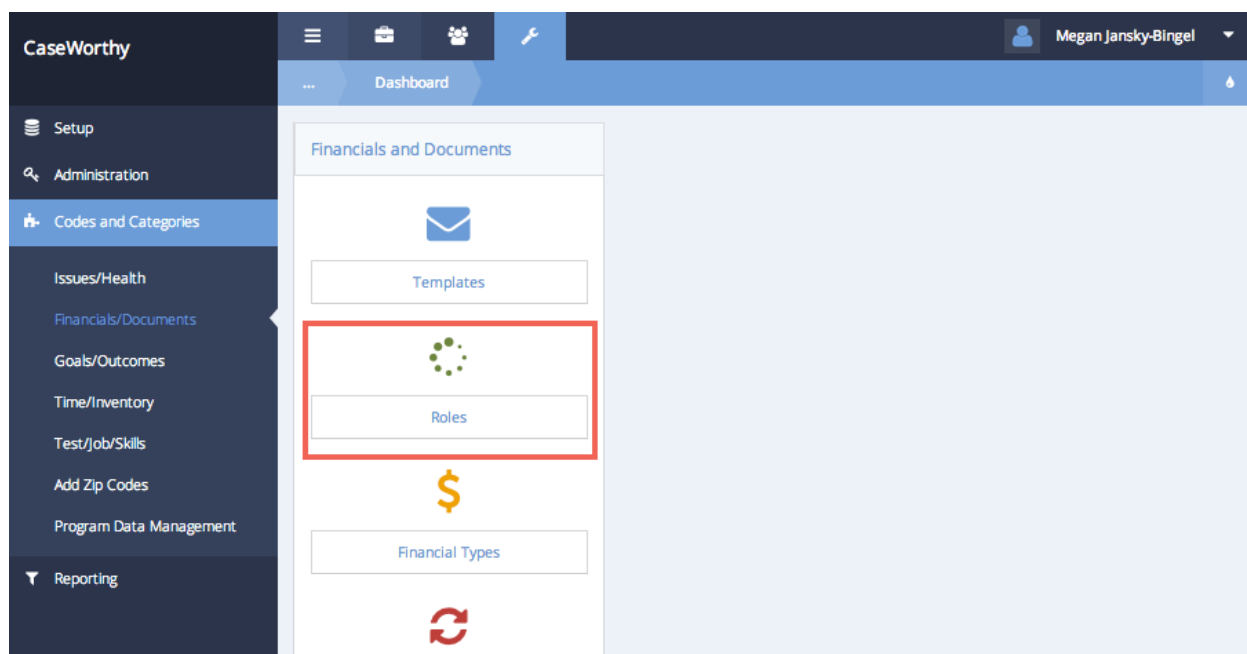
Save


Cancel

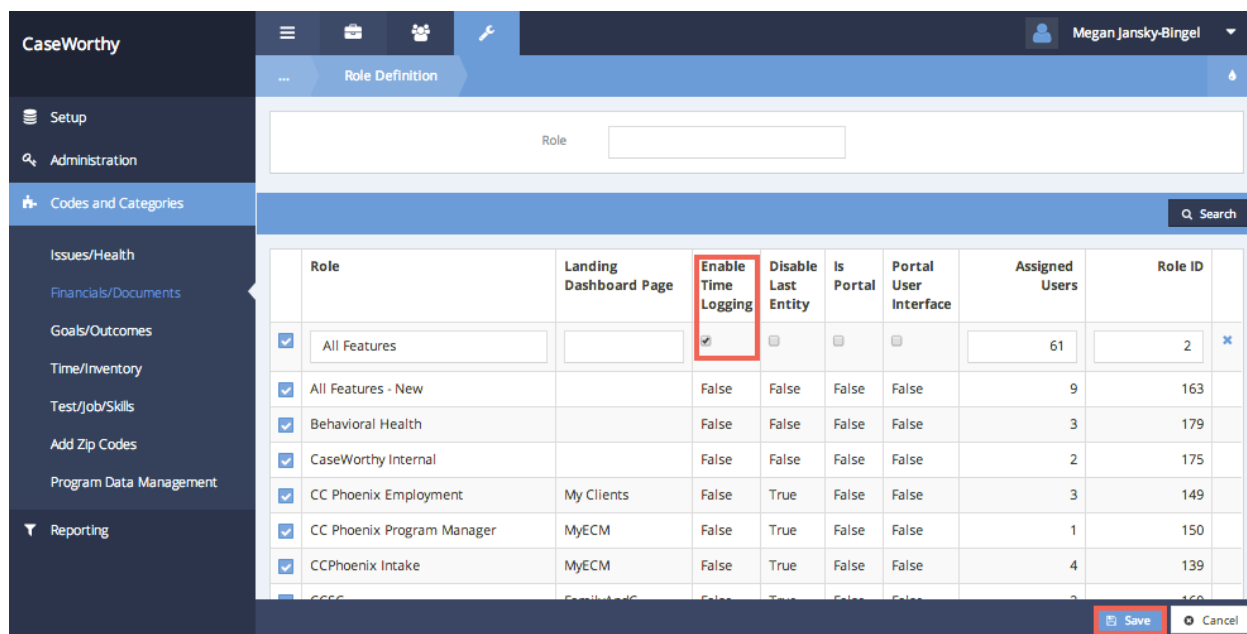
Roles

(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.



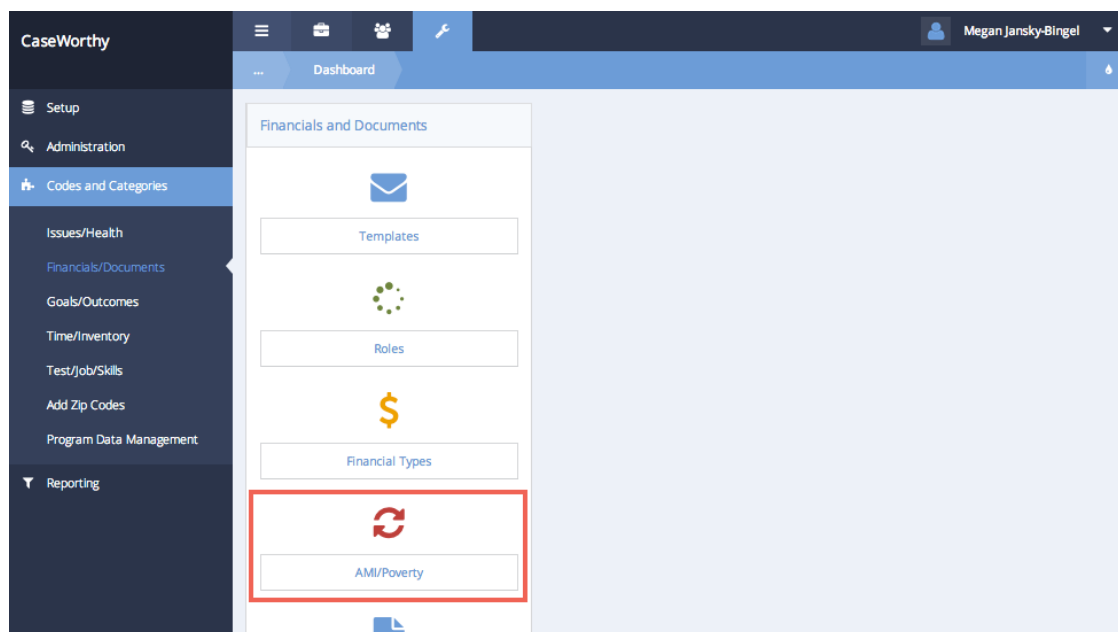
The Role Definition form displays. To edit the time logging setting, click the blue checkbox ☒ next to the desired role. Click or unclick the Enable Time Logging checkbox. When all roles have Enable Time Logging set as desired, click the  Save button.



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.

CaseWorthy

Megan Jansky-Bingel

Poverty Listing


+ Add New

Area Name State

Search

	AMIID	Area Name	State	Metro AMI	Single Poverty	Add'l Member
+	1	Federal United States - 2011	Unknown	\$51,600.00	\$18,050.00	\$2,050.00
+	6	United States 2012	Unknown	\$52,400.00	\$18,350.00	\$2,100.00

Done

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.

CaseWorthy

Megan Jansky-Bingel

Area Median Income/Poverty

Area Name State

Area Median Income

Metro Non-Metro

Total

Poverty Level

1 Family Member 2 Family Members

3 Family Members 4 Family Members

5 Family Members 6 Family Members

7 Family Members 8 Family Members

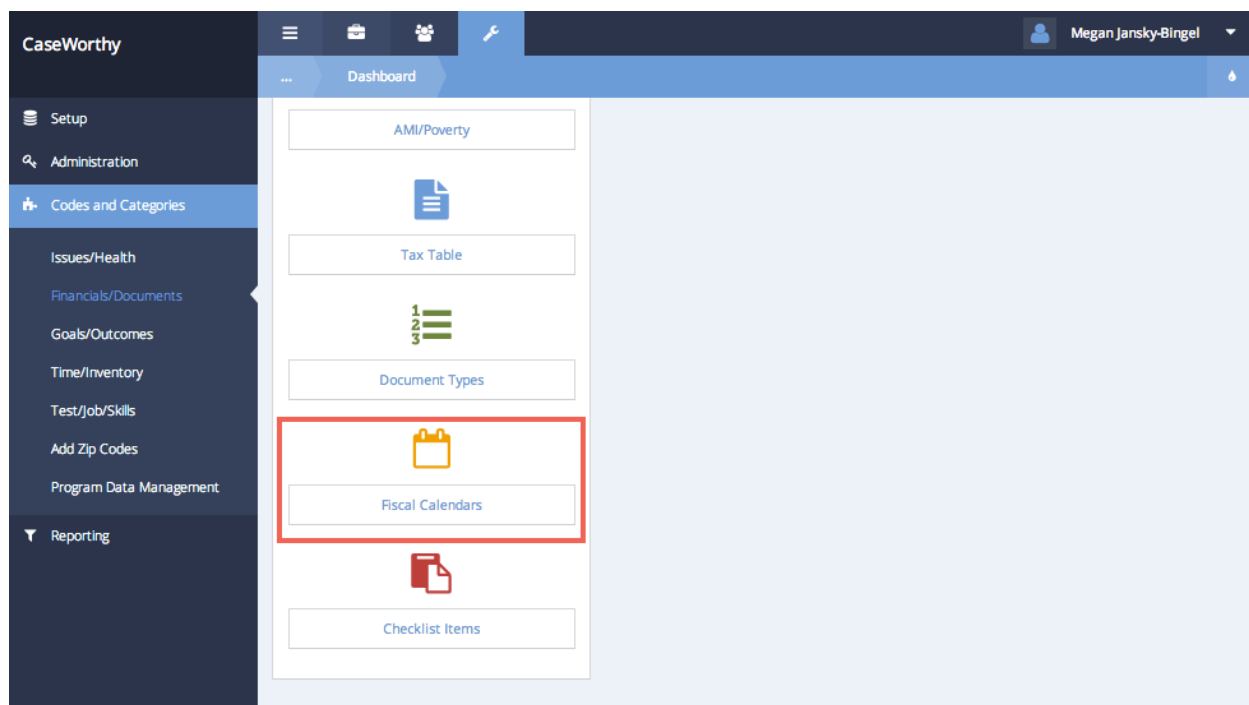
Additional Add

Save Cancel

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.**

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
7/1/2014	12/31/2014	megs budget	Open
1/1/2014	12/31/2014	2014 Fiscal Calendar, Jan 01, 2014 - Dec 31, 2014	Open
9/1/2013	8/31/2014	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
1/1/2013	12/31/2013	AM TEST	Open
1/1/2013	12/31/2013	AM TEST	Open
1/1/2013	12/31/2013	2013 Fiscal Calendar, January 1, 2013	Open

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.

Description: 2014 Federal Fiscal Year

Enter the Fiscal Calendar Begin and End Dates

Begin Date: 10/01/2013

End Date: 09/30/2014

Status: Open

Save Cancel

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”.

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
7/1/2014	12/31/2014	megs budget	Open
3/1/2014	3/1/2014	2014 Fiscal Calendar, Jan 01, 2014 - Dec 31, 2014	Open
3/1/2014	3/1/2014	meg test	Open
3/1/2014	3/1/2014	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
1/1/2013	12/31/2013	AM TEST	Open
1/1/2013	12/31/2013	AM TEST	Open
1/1/2013	12/31/2013	2013 Fiscal Calendar, January 1, 2013	Open

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.

Description *	Begin Date *	End Date *	Status *	Fiscal Calendar Month ID
October 2014	10/01/2014	10/31/2014	Open	
August 2013	8/16/2013	8/16/2013	Open	183




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

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	2/31/2014	megs budget	Open
 Add Month Details	2/31/2014	2014 Fiscal Calendar, Jan 01, 2014 - Dec 31, 2014	Open
 Delete	31/2014	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

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 

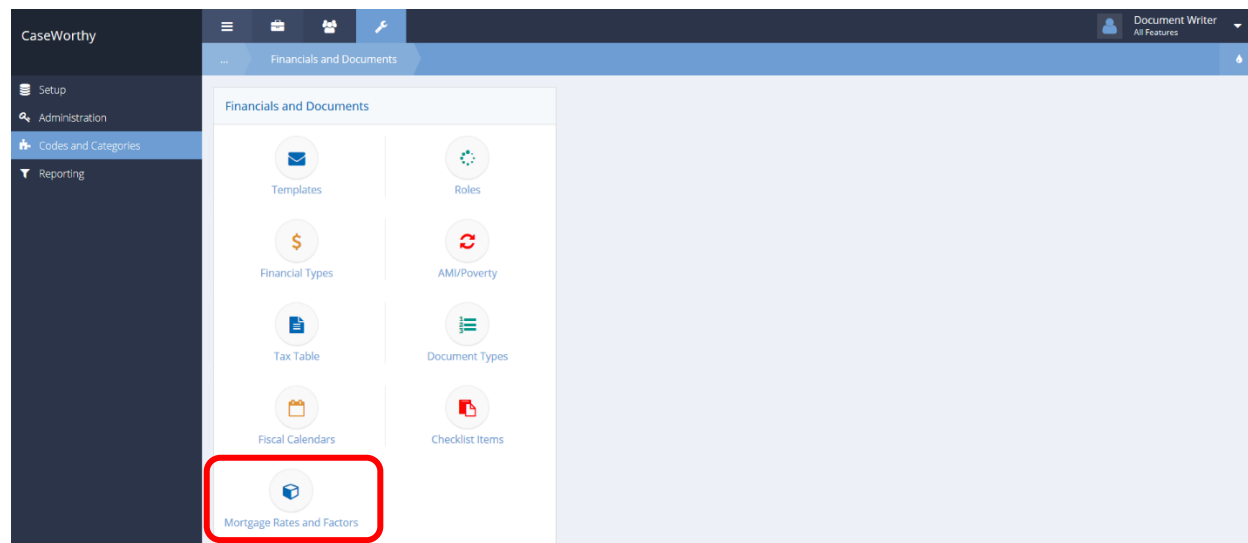
Status: Open

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.


The screenshot displays the 'Mortgage Rates And Factors' form. At the top right, there is a '+ Add Row' button highlighted with a red box. Below this is an 'EndDate' field with a calendar icon. A blue header bar indicates 'Total Rows: 2'. Below the header is a table with the following data:

	Begin Date	Description	Interest Rate	15 Yr. Factor	30 Yr Factor
<input checked="" type="checkbox"/>	12/9/2015	Interest Rate - 4.000	4.0000%	4.7700%	4.9000%
<input checked="" type="checkbox"/>	12/9/2015	Interest Rate - 4.125	4.1250%	4.8000%	4.9900%

To add a new entry, click the **+ Add New** button. Click the blue checkbox ☒ icon to edit an entry, the row expands.

Total Rows: 2

	Begin Date	Description	Interest Rate	15 Yr. Factor	30 Yr Factor	
<input checked="" type="checkbox"/>	12/9/2015	Interest Rate - 4.000	4.0000%	4.7700%	4.9000%	
<input checked="" type="checkbox"/>	12/09/2015 	Interest Rate - 4.125	4.1250	4.8000	4.9900	
End Date		12/09/2015 				

Make any necessary edits. Click the  button to save and exit.

Issues/Health

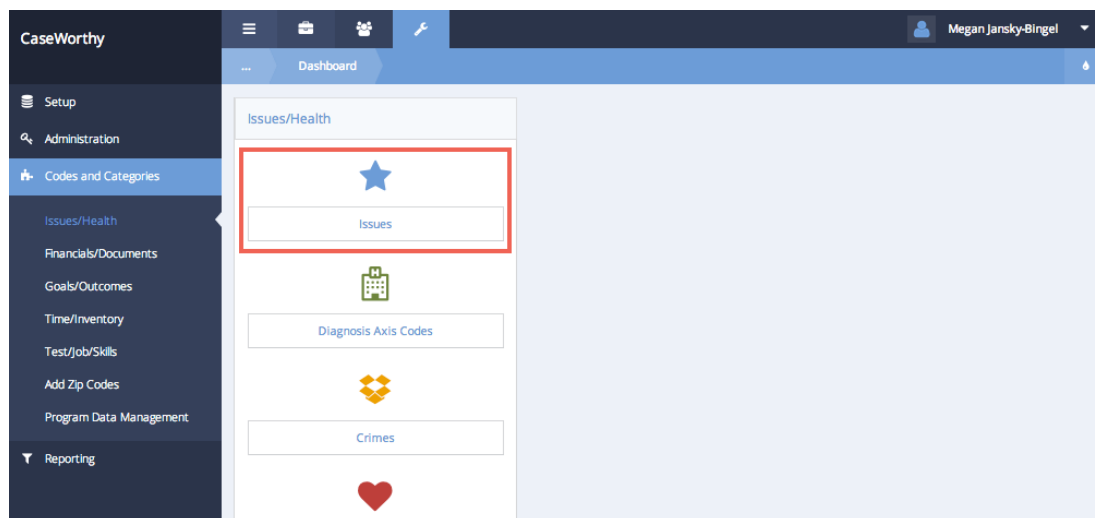
(Administration>Codes and Categories>Issues/Health)

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

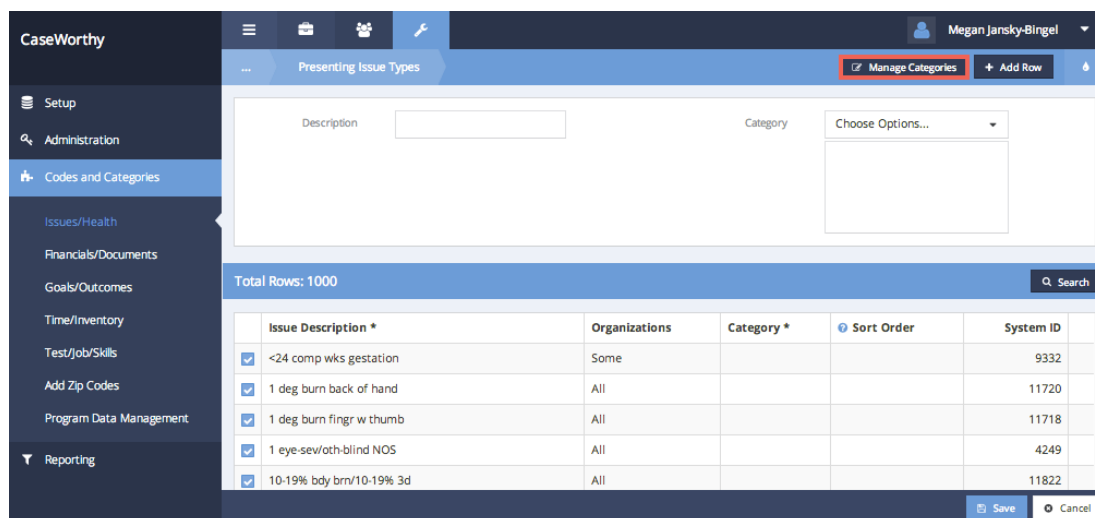
Issues

(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.

Issue Category *	Category ID
Addiction	2
ADL - Bathing	24
ADL - Continence	20
ADL - Dressing	23
ADL - Feeding	19
ADL - Toileting	22
ADL - Transferring	21
CC Phoenix	37
Developmental Disability	3
Disability	6
Disadvantage	17

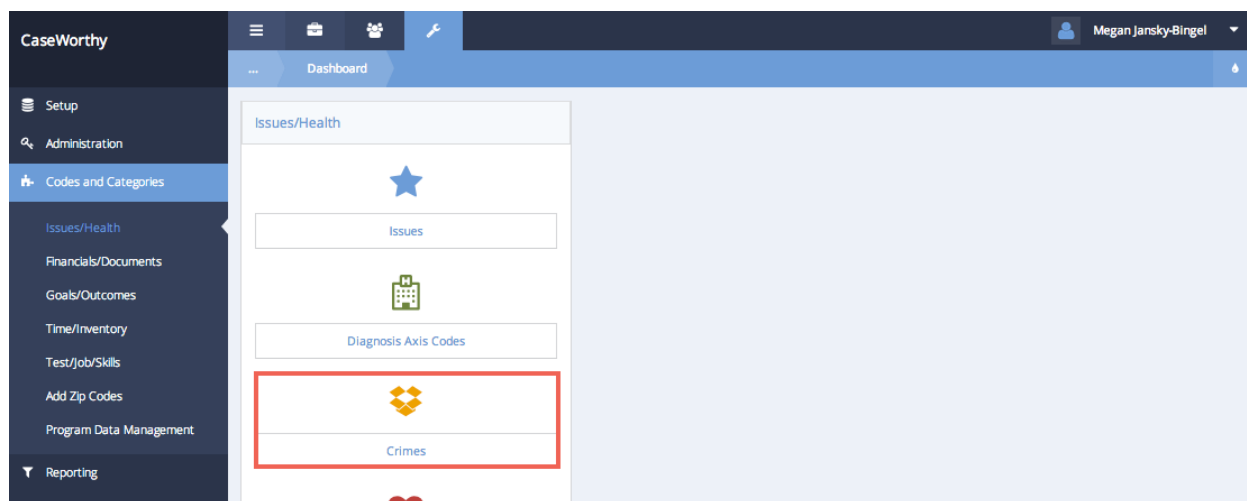
The Issue Types form displays. To add an issue type, click the **+ Add Row** button. Add a row for each issue type to be entered. Enter a Description and Category. Link the organizations that should have access to the issue type. When all desired issue types have been entered click the **Save** button.

Issue Description *	Organizations	Category *	Sort Order	System ID
Attachment Disorder	All	Developmental Disability		
<24 comp wks gestation	Some			9332
1 deg burn back of hand	All			11720

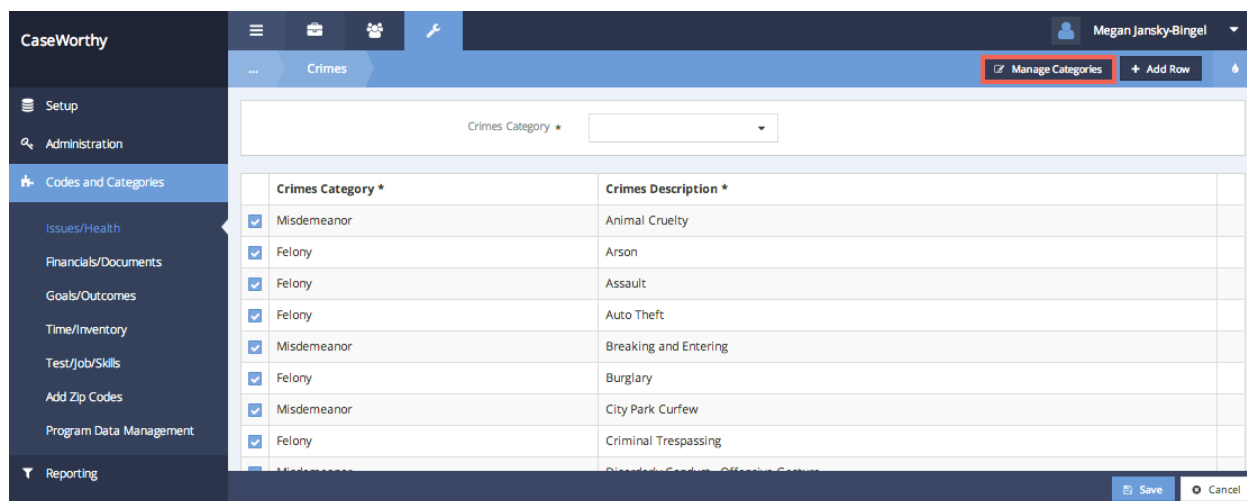
Crimes

(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.

CaseWorthy

Megan Jansky-Bingel

Crime Category

+ Add Row

Crime Category
<input checked="" type="checkbox"/> Federal
<input checked="" type="checkbox"/> Civil
<input checked="" type="checkbox"/> Felony
<input checked="" type="checkbox"/> Misdemeanor

Save Cancel

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.

CaseWorthy

Megan Jansky-Bingel

Crimes

Manage Categories + Add Row

Crimes Category *

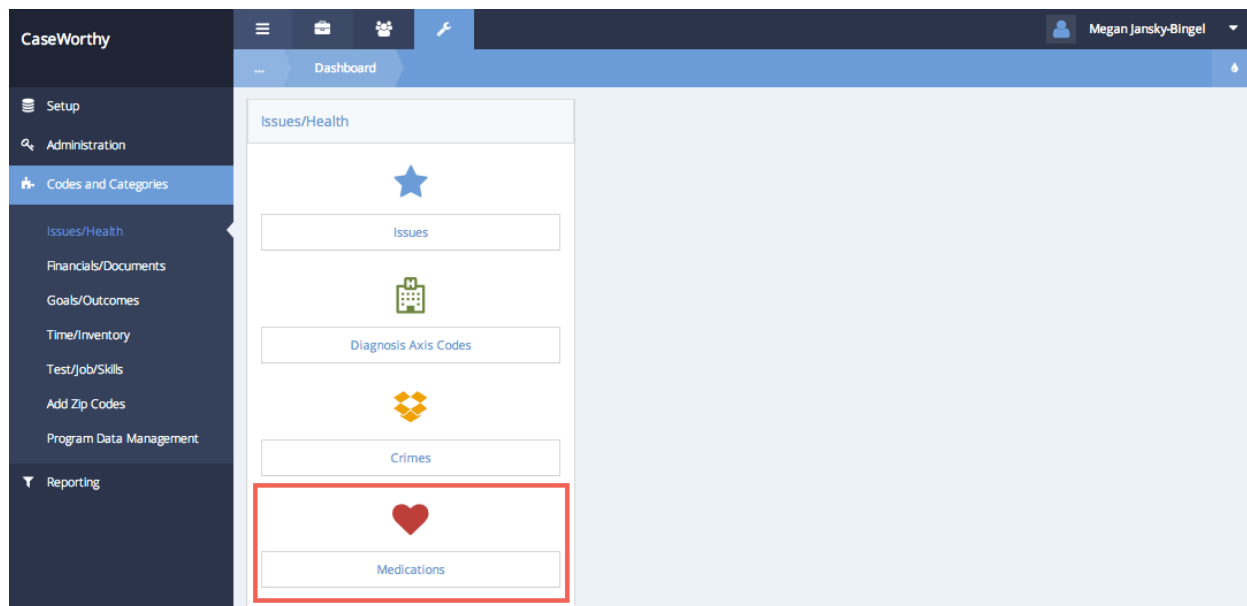
Crimes Category *	Crimes Description *
<input checked="" type="checkbox"/> Misdemeanor	Aiding and Abetting
<input checked="" type="checkbox"/> Misdemeanor	Animal Cruelty
<input checked="" type="checkbox"/> Felony	Arson
<input checked="" type="checkbox"/> Felony	Assault
<input checked="" type="checkbox"/> Felony	Auto Theft
<input checked="" type="checkbox"/> Misdemeanor	Breaking and Entering
<input checked="" type="checkbox"/> Felony	Burglary
<input checked="" type="checkbox"/> Misdemeanor	City Park Curfew

Save Cancel

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.

The screenshot shows the CaseWorthy 'Medications' form. At the top, there is a '+ Add Row' button highlighted with a red rectangle. Below it is a form with fields for 'Description', 'Category', 'Controlled Substance', and 'Critical'. Below the form is a table with columns: 'Description *', 'Category *', 'Controlled Substance *', 'Critical', and a checkbox column. The table contains the following data:

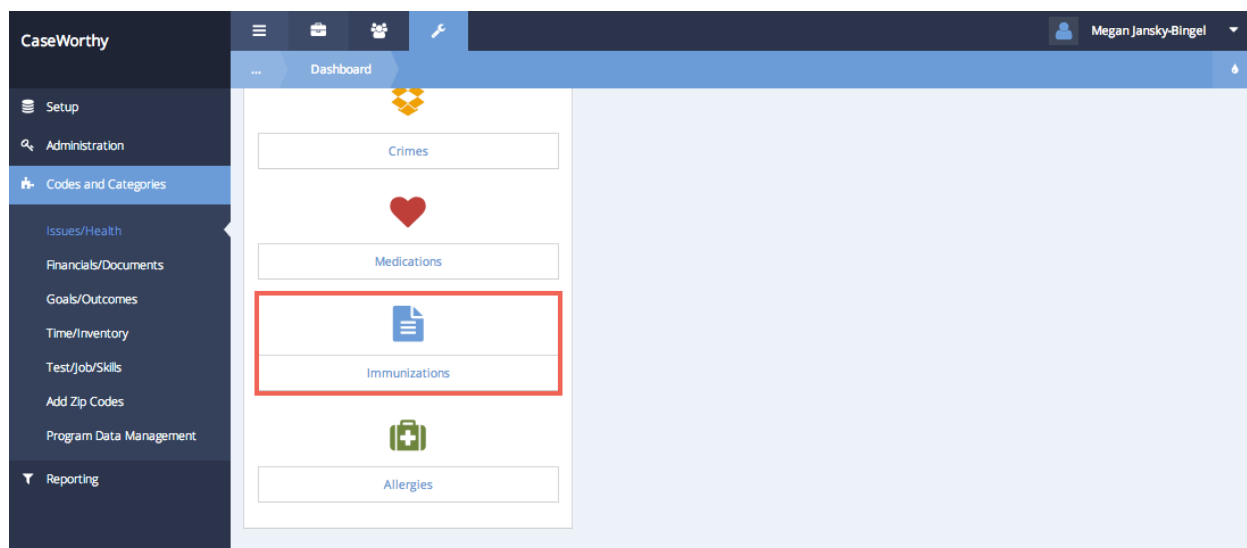
Description *	Category *	Controlled Substance *	Critical	
<input checked="" type="checkbox"/> Convulex	Anti-Epileptics	Yes	Yes	<input checked="" type="checkbox"/>
<div> <div>Liquid</div> <div>No</div> <div>Refrigerated</div> <div>No</div> </div>				
<div> <div>Medication Type</div> <div>Brand Name</div> </div>				
<input checked="" type="checkbox"/> Aspirin	Alzheimer's & Parkinson's	No	No	
<input checked="" type="checkbox"/> Cymbalta (duloxetine)	Anti-Depressants	No		
<input checked="" type="checkbox"/> Excedrin	Alzheimer's & Parkinson's	No		
<input checked="" type="checkbox"/> Iliik	Allergies & Asthma	No		

At the bottom right of the form, there are 'Save' and 'Cancel' buttons. The 'Save' button is highlighted with a red rectangle.

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.

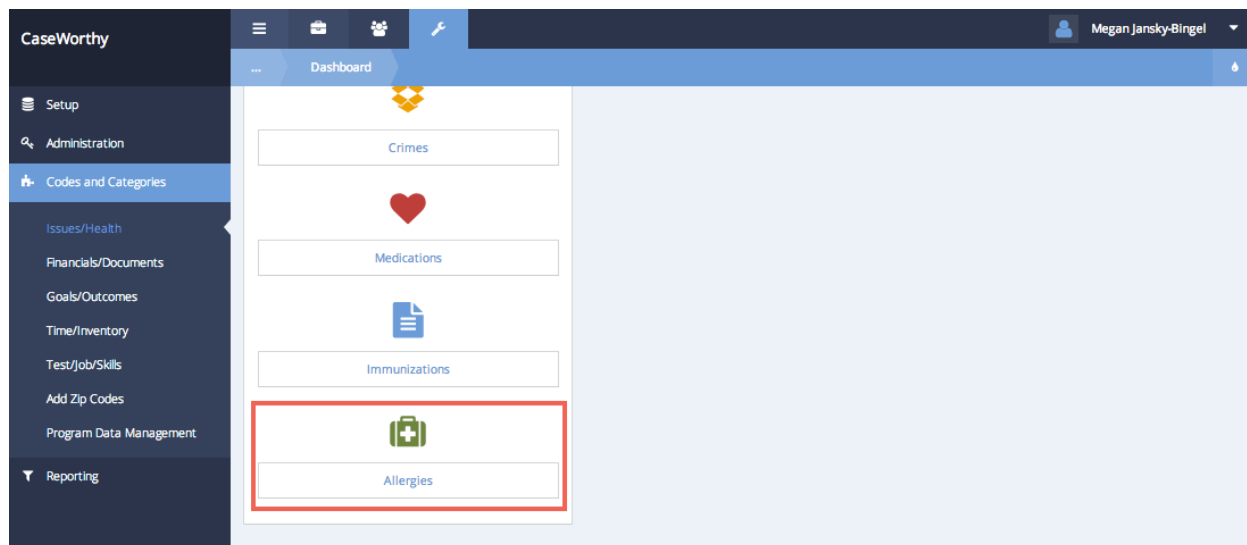
 The screenshot shows the 'Head Start Immunizations' form. At the top right, there's a '+ Add Row' button highlighted with a red box. Below it is a table with columns for 'Description *', 'Short Description', and 'Dose' (Dose1 through Dose5). The first row is highlighted with a red box. The 'Description' is 'Human Papillomavirus', 'Short Description' is 'HPV2', and 'Dose1' is '11 Ye'. Below the table, there are checkboxes for various immunizations: Diphtheria, tetanus, pertussis; Hepatitis A; Hepatitis B; Inactivated Polio Virus; Measles Mumps Rubella; Meningococcal; Pneumococcal; Rotavirus; and Varicella. At the bottom right, there are 'Save' and 'Cancel' buttons, with 'Save' highlighted by a red box.

Description *	Short Description	Dose1	Dose2	Dose3	Dose4	Dose5
<input checked="" type="checkbox"/> Human Papillomavirus	HPV2	11 Ye	11 Ye	11 Ye		
<input checked="" type="checkbox"/> Diphtheria, tetanus, pertussis	DTaP					
<input checked="" type="checkbox"/> Hepatitis A	HepA					
<input checked="" type="checkbox"/> Hepatitis B	HepB					
<input checked="" type="checkbox"/> Inactivated Polio Virus	IPV					
<input checked="" type="checkbox"/> Measles Mumps Rubella	MMR					
<input checked="" type="checkbox"/> Meningococcal	MCV4					
<input checked="" type="checkbox"/> Pneumococcal	PCV					
<input checked="" type="checkbox"/> Rotavirus	RV					
<input checked="" type="checkbox"/> Varicella	Varicella					

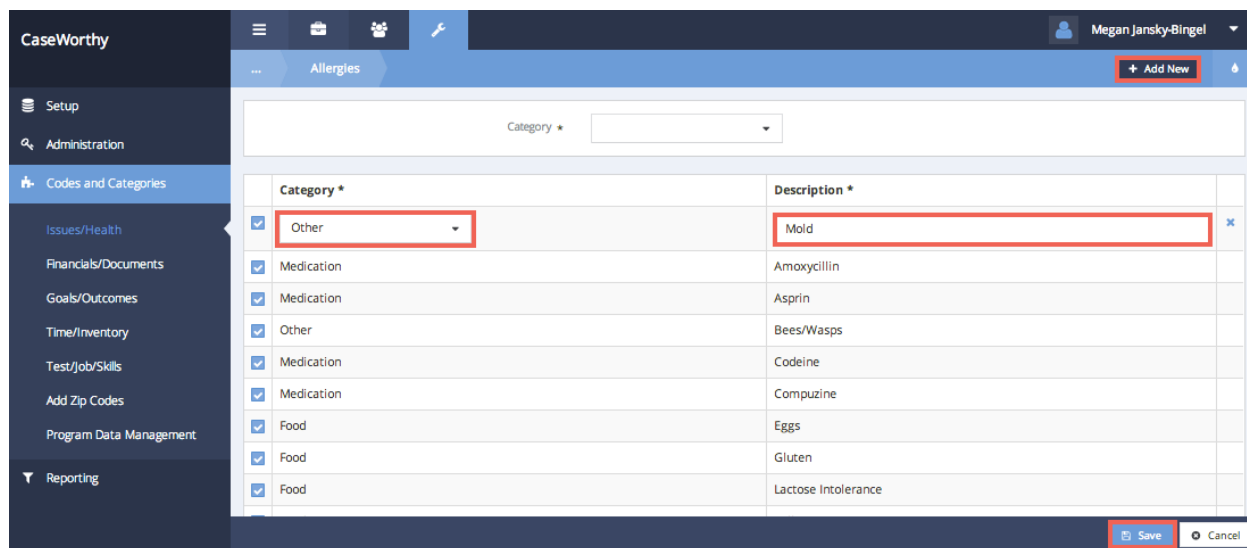
Allergies

(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.

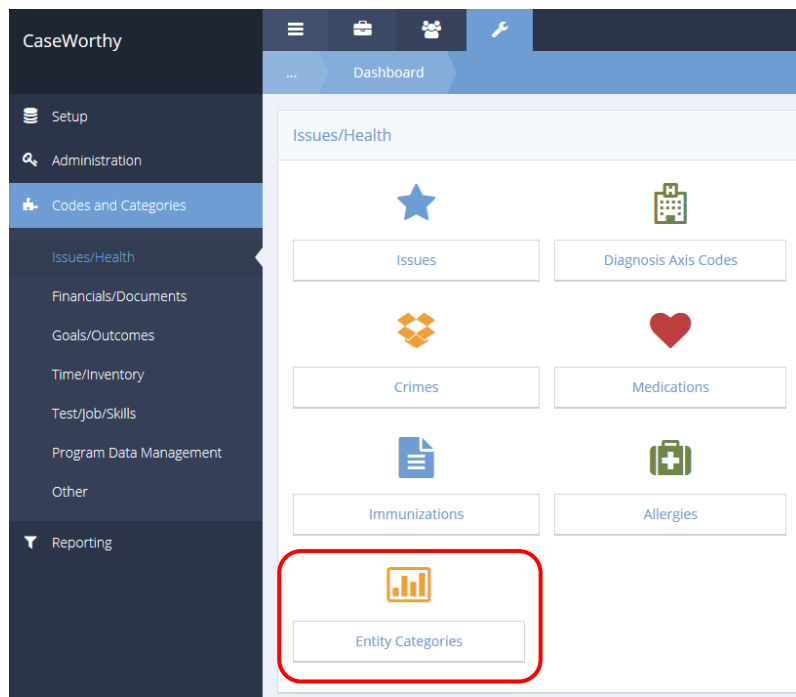


The Allergies form displays. To add an allergy, click the **+ Add Row** button. Add a row for each allergy to be entered. Enter a Description and select a Category. When all desired allergies have been entered click the **Save** button.



Entity Class Types

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



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

The screenshot shows the 'Entity Categories' form. At the top, there's a blue header with 'Entity Categories' and two buttons: '+ Type Classifications' and '+ Add Row'. The '+ Type Classifications' button is highlighted with a red rectangle. Below the header is a table with three columns: 'Description', 'Type Classification', and 'System ID'. The table contains two rows of data.

Description	Type Classification	System ID
<input checked="" type="checkbox"/> Observe Taking Medications		1
<input checked="" type="checkbox"/> High Risk		3

Click the **+ Type Classifications** button.

The Entity Class Types form displays.

	Description	System ID
<input checked="" type="checkbox"/>	Medication	1

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.

Goal Description *	Goal Category	Organizations	System ID
<input checked="" type="checkbox"/> \$50 savings	Financial	All	49
<input checked="" type="checkbox"/> Ability to follow rules and instructions.	HS Health Status and Practices	All	63
<input checked="" type="checkbox"/> Ability to give and take in situations. (Sharing)	HS Cooperation	All	72
<input checked="" type="checkbox"/> Acquire GED	Education	All	51
<input checked="" type="checkbox"/> Acquire needed docs	Legal	All	50
<input checked="" type="checkbox"/> Acquire Stable Housing	Housing	All	45
<input checked="" type="checkbox"/> Adequate, healthy food is available in the home	Family Support	All	88
<input checked="" type="checkbox"/> Awareness of jobs and how to perform them.	HS Knowledge of Families and Communities	All	78
<input checked="" type="checkbox"/> Children have safe, adequate sleeping arrangements	Family Support	All	86
<input checked="" type="checkbox"/> Chip Benefits	Entitlements	All	46

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.

Category Name *	Category ID
<input checked="" type="checkbox"/> Self-sufficiency	
<input checked="" type="checkbox"/> Anger Management	12
<input checked="" type="checkbox"/> Basic Skills	4
<input checked="" type="checkbox"/> Education	1
<input checked="" type="checkbox"/> Employment	2
<input checked="" type="checkbox"/> Entitlements	5
<input checked="" type="checkbox"/> Family Support	28
<input checked="" type="checkbox"/> Financial	6
<input checked="" type="checkbox"/> Housing	3
<input checked="" type="checkbox"/> HS Cooperation	22
<input checked="" type="checkbox"/> HS Fine Motor Skills	19
<input checked="" type="checkbox"/> HS Gross Motor Skills	18

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.

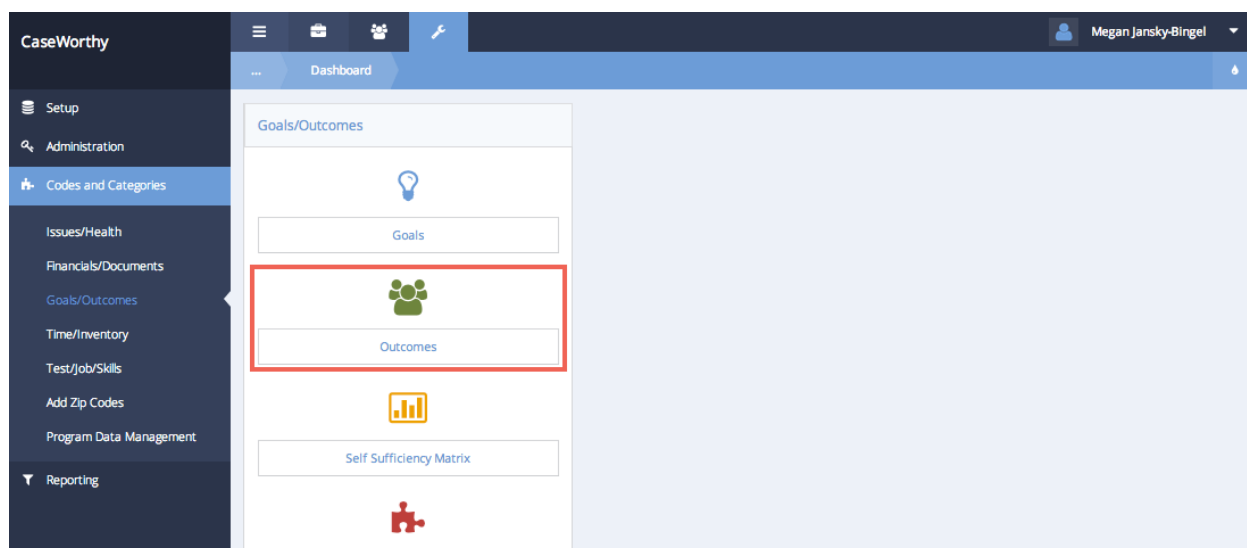
The screenshot displays the CaseWorthy System Administrator interface. The top navigation bar includes the CaseWorthy logo, a user profile dropdown for Megan Jansky-Bingel, and a 'Goals' tab. The sidebar on the left contains navigation links: Setup, Administration, Codes and Categories (highlighted), Issues/Health, Financials/Documents, Goals/Outcomes, Time/Inventory, Test/Job/Skills, Add Zip Codes, Program Data Management, and Reporting. The main content area is titled 'Goals' and features a 'Manage Categories' button and an 'Add New' button (highlighted with a red box). Below this is a 'Goal Category' dropdown menu. The main table lists goals with columns: Goal Description *, Goal Category, Organizations, and System ID. The first row is a new entry: 'Safe, stable, affordable housing' (highlighted with a red box), 'Housing', and a dropdown menu for Organizations showing 'CaseWorthy' and 'Catholic Charities'. Other rows include '\$50 savings' (Financial, 49), 'Ability to follow rules and instructions.' (HS Health Status and Practices, 63), 'Ability to give and take in situations. (Sharing)' (HS Cooperation, 72), and 'Acquire GED' (Education, 51). The 'Save' button (highlighted with a red box) and 'Cancel' button are at the bottom right.

Goal Description *	Goal Category	Organizations	System ID
<input checked="" type="checkbox"/> Safe, stable, affordable housing	Housing	All None Choose Options... CaseWorthy Catholic Charities	
<input checked="" type="checkbox"/> \$50 savings	Financial	All	49
<input checked="" type="checkbox"/> Ability to follow rules and instructions.	HS Health Status and Practices	All	63
<input checked="" type="checkbox"/> Ability to give and take in situations. (Sharing)	HS Cooperation	All	72
<input checked="" type="checkbox"/> Acquire GED	Education	All	51

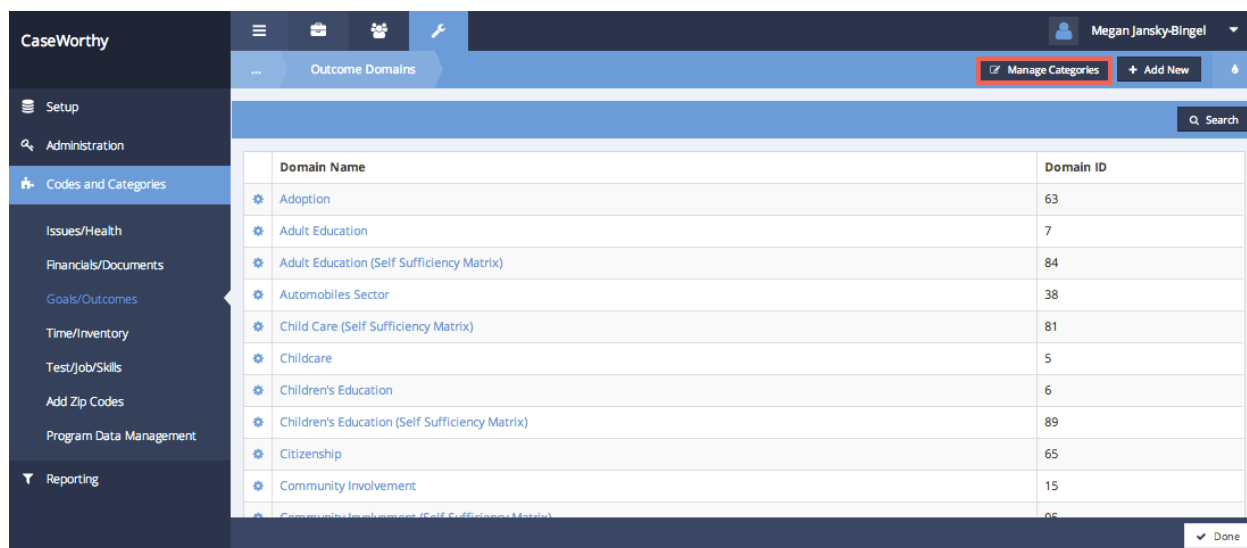
Outcomes

(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.

CaseWorthy

Megan Jansky-Bingel

Edit Outcome Domain

Domain Name * Self-sufficiency

Domain Categories * Choose Options...
Self Sufficiency Matrix

Save Cancel

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

CaseWorthy

Megan Jansky-Bingel

Outcome Domains

Manage Categories + Add New

Search

Domain Name	Domain ID
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)	85

Done

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

CaseWorthy

... Edit Outcome Domain

Domain Name * Adult Education

Domain Categories * Choose Options...

Education

Other

Save Cancel

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

CaseWorthy

... Outcome Domains

Manage Categories Add New

Search

Domain Name	Domain ID
Adult Education	63
Adult Education (Self Sufficiency Matrix)	7
Automobiles Sector	84
Automobiles Sector (Self Sufficiency Matrix)	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

dev.caseworthy.com/CaseWorthy/Login.aspx?Database...

Done

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.

CaseWorthy

Megan Jansky-Bingel

Outcome Scores

+ Add Row

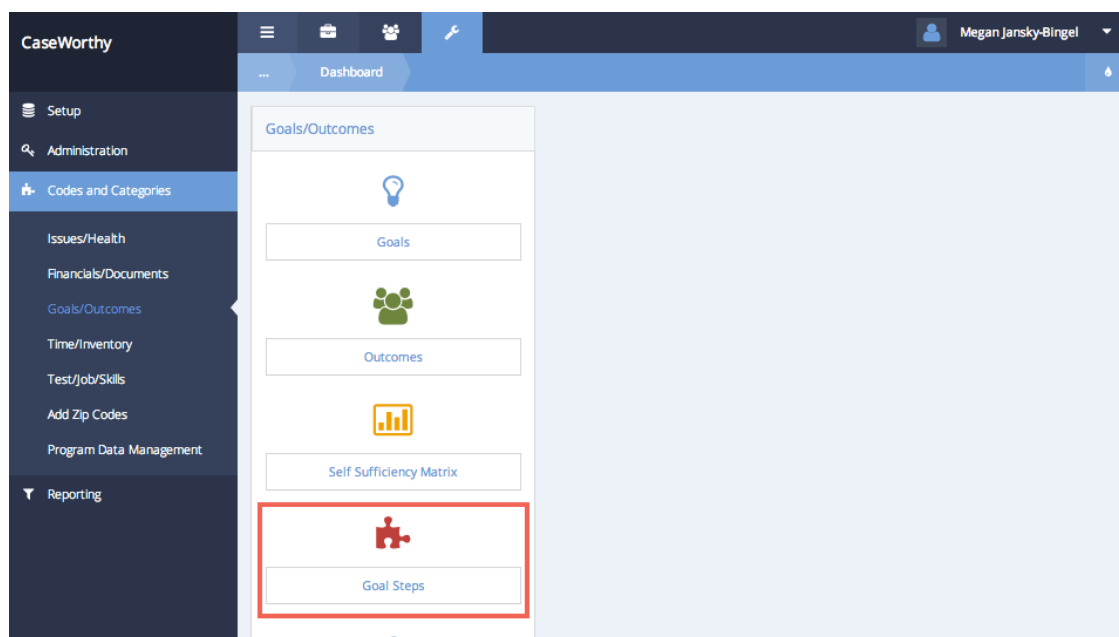
	Reporting Value	Scoring Value	Short Description	Long Description	Sort Order
<input checked="" type="checkbox"/>	1	1.00	Literacy problems	Literacy problems and/or no high school diploma/GED are serious	
<input checked="" type="checkbox"/>	2	2.0000	Enrolled in literacy and/or GED program and/or has	Enrolled in literacy and/or GED program and/or has sufficient command of English to where language is not a barrier to employment	
<input checked="" type="checkbox"/>	3	3.0000	Has high school diploma/GED	Has high school diploma/GED	
<input checked="" type="checkbox"/>	4	4.0000	Needs additional education/training to improve emp	Needs additional education/training to improve employment situation and/or to resolve literacy problems to where they are able to function effectively in society	
<input checked="" type="checkbox"/>	5	5.0000	Has completed education/training needed to become	Has completed education/training needed to become employable. No literacy problems	
<input checked="" type="checkbox"/>	8	-1.0000	Don't Know	Don't Know	
<input checked="" type="checkbox"/>	9	-1.0000	Refused	Refused	

Save Cancel

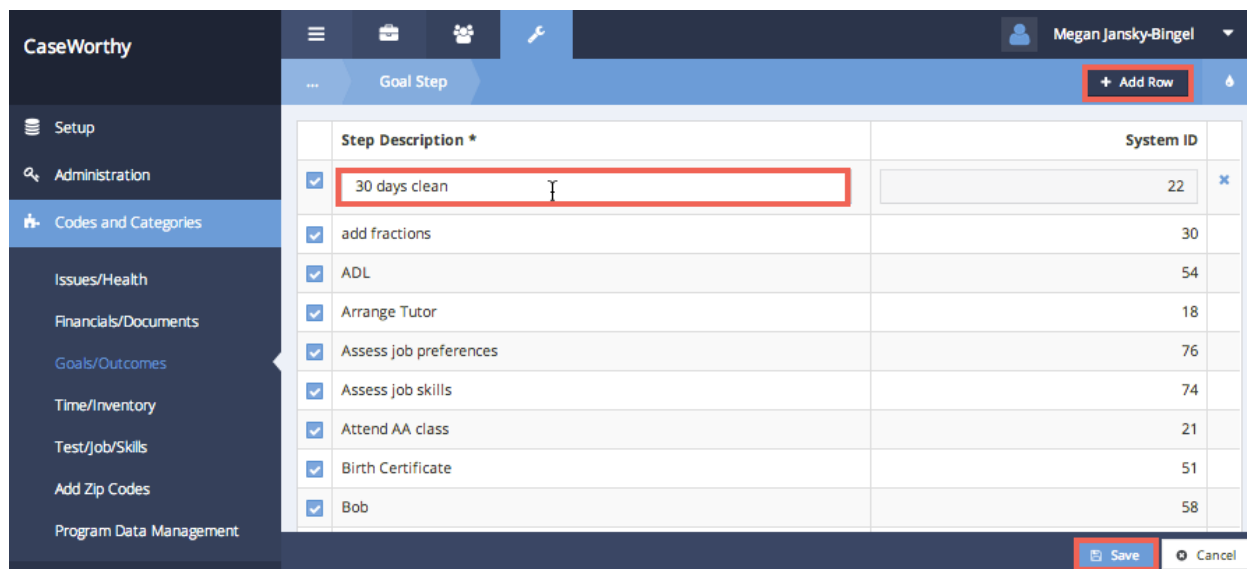
Goal Steps

(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.



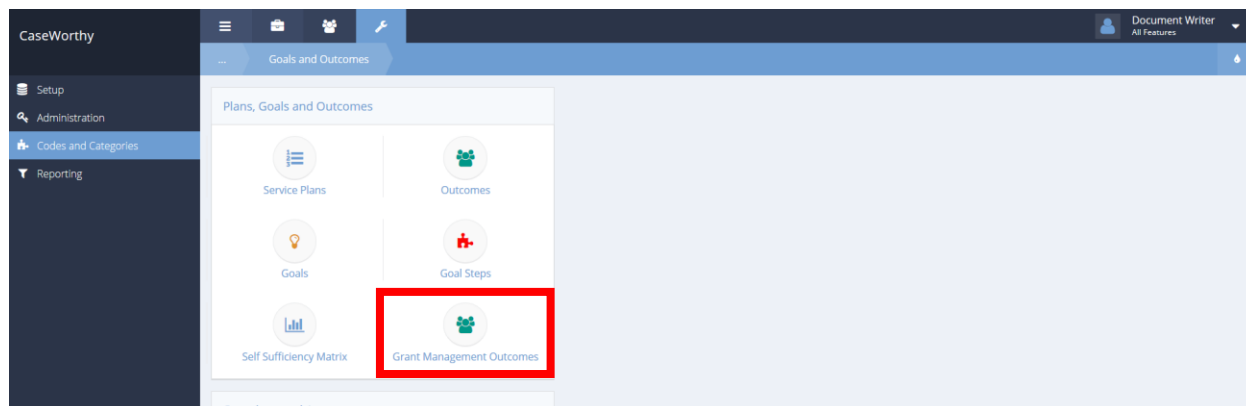
The Goal Steps area allows system administrators to customize the goal steps list that can be linked to goals and accessible to users. To learn more about linking Goals and Goal Steps refer to the Mappings>Goal Mappings area of this manual. To access the Goal Steps set up area, select the Goal Steps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

Manage Categories Add New

Domain Category Choose Options...

Total Rows: 66 Search

Domain Name	Number of Scores	Domain ID
CSAB - Agency Credibility		
Board of Directors (BOD)	5	194
Executive Staff	5	195
Financial Capability	5	196
CSAB - Children & Families Served		
Children's Services Ordinance	5	197
Eligibility Determination/Verification	5	198
CSAB - Need for Services		
Need or Problem is Clearly Stated and Defined	5	199
Need is Supported by Local, Relevant and Most Recent Statistics/Data	5	200
Proposed Program Directly Addresses Stated Need	5	201

Done

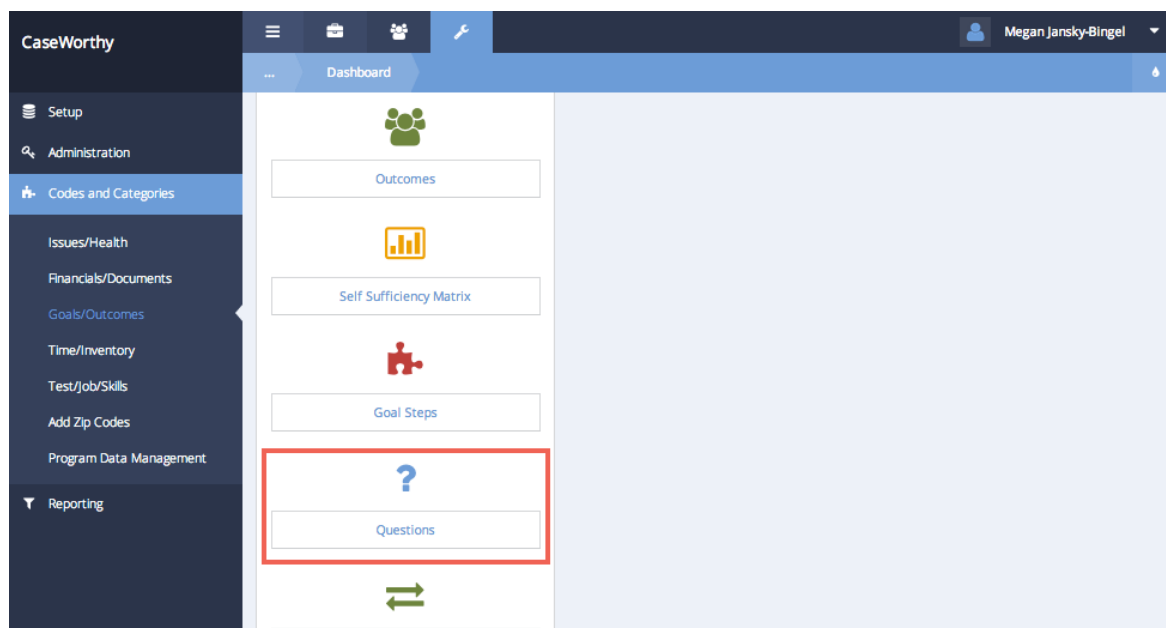
Outcome domains display. Filter results by using the Domain Category drop down list to select categories to search by. Click the Search button to populate results. To add new domain, click the Add New button. To manage categories, click the Manage Categories button. Click the action gear icon associated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

Questions

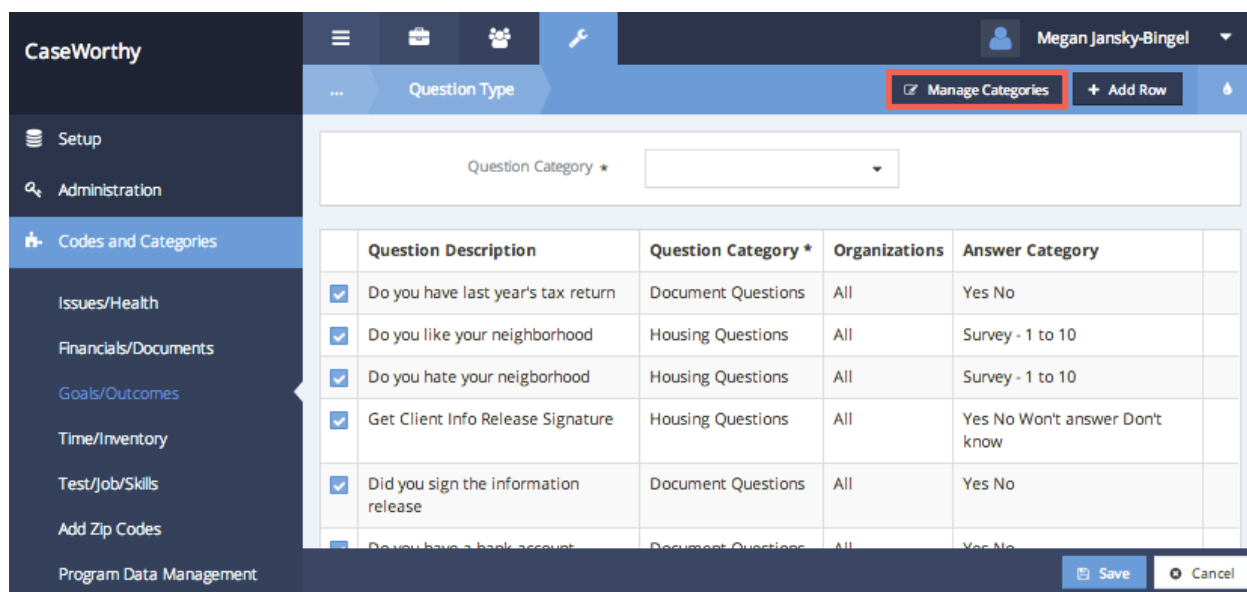
(Administration>Codes and Categories>Goals/Outcomes>Questions)

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 **Manage Categories** 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 screenshot shows the 'Question Category' form in the CaseWorthy system. The left sidebar contains navigation options: Setup, Administration, Codes and Categories (selected), Issues/Health, Financials/Documents, Goals/Outcomes, Time/Inventory, Test/Job/Skills, Add Zip Codes, and Program Data Management. The main area displays a table with the following data:

Category Name	
Housing Questions	<input checked="" type="checkbox"/>
Document Questions	<input checked="" type="checkbox"/>
Returning Survey	<input checked="" type="checkbox"/>
Employment Questions	<input checked="" type="checkbox"/>
Support Survey	<input checked="" type="checkbox"/>
Dummy Vals	<input checked="" type="checkbox"/>
Suvarna Vals	<input checked="" type="checkbox"/>
Risk/Needs Profile	<input checked="" type="checkbox"/>

The '+ Add Row' button is located in the top right corner, and the 'Save' button is in the bottom right corner.

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 and Answer Category. Link the organizations that should have access to the question. When all desired questions have been entered click the **Save** button.

The screenshot shows the 'Question Type' form in the CaseWorthy system. The left sidebar contains navigation options: Setup, Administration, Codes and Categories (selected), Issues/Health, Financials/Documents, Goals/Outcomes, Time/Inventory, Test/Job/Skills, Add Zip Codes, Program Data Management, and Reporting. The main area displays a table with the following data:

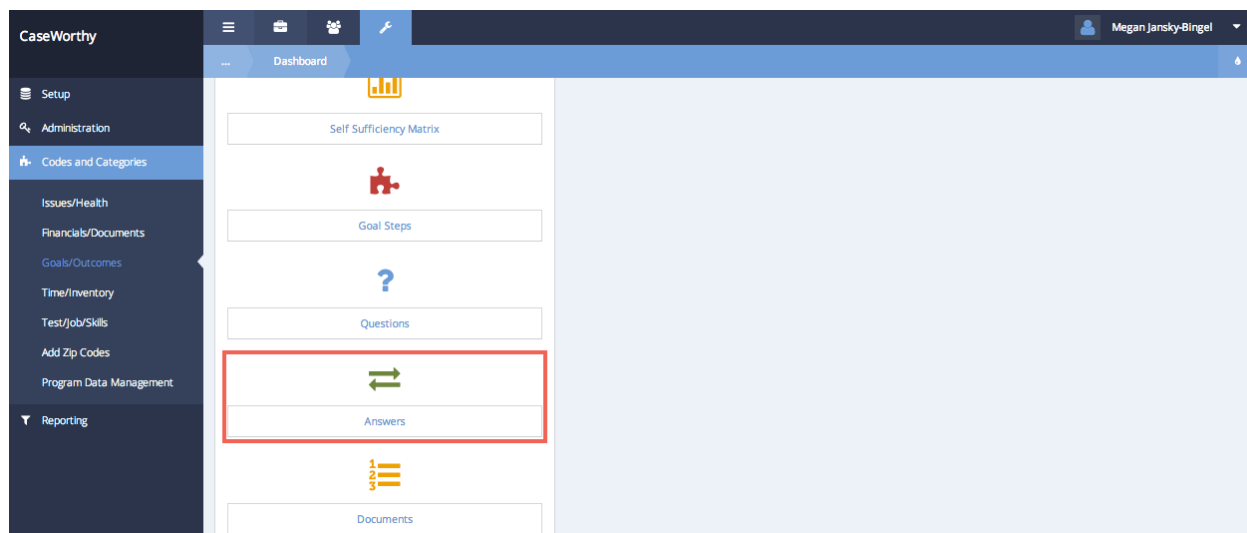
Question Description	Question Category *	Organizations	Answer Category
How likely are you to refer family members?	Satisfaction Surveys	All, None, Choose Options... CaseWorthy, Community Health Resources	Survey - 1 to 10
Do you have last year's tax return	Document Questions	All	Yes No
Do you like your neighborhood	Housing Questions	All	Survey - 1 to 10
Do you hate your neighborhood	Housing Questions	All	Survey - 1 to 10
Get Client Info Release Signature	Housing Questions	All	Yes No Won't answer Don't know
Did you sign the information release	Document Questions	All	Yes No
Do you have a bank account	Document Questions	All	Yes No
Were your Questions fully answered?	Support Survey	All	Yes No Won't answer Don't know

The '+ Add Row' button is located in the top right corner, and the 'Save' button is in the bottom right corner.

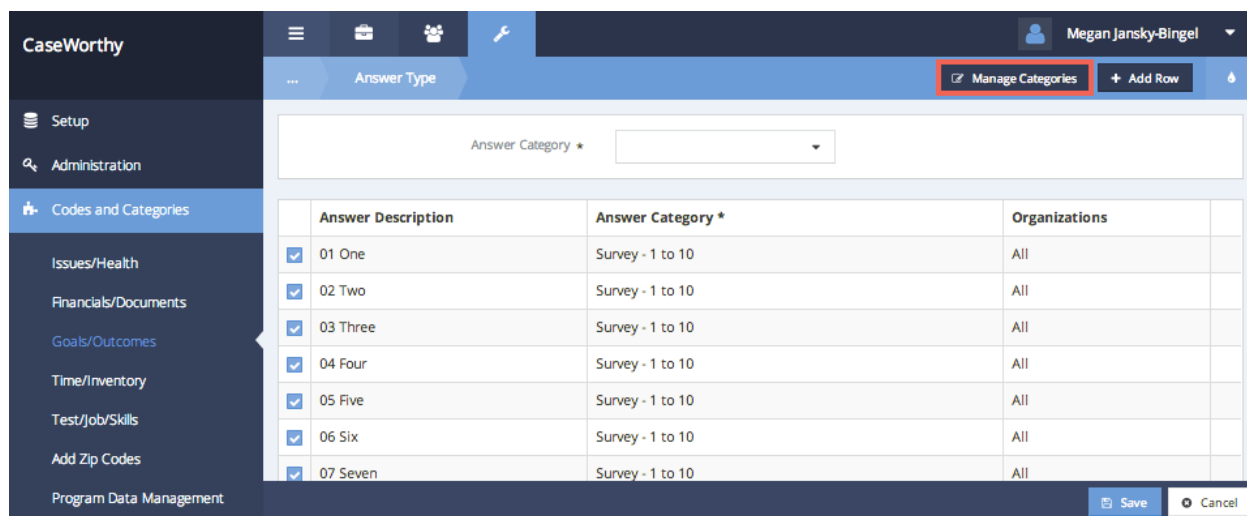
Answers

(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.

CaseWorthy

Megan Jansky-Bingel

Answer Category

+ Add Row

	Category Name
<input checked="" type="checkbox"/>	Yes No
<input checked="" type="checkbox"/>	Survey - 1 to 10
<input checked="" type="checkbox"/>	Yes No Won't answer Don't know
<input checked="" type="checkbox"/>	Not Applicable

Save Cancel

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.

CaseWorthy

Megan Jansky-Bingel

Answer Type

Manage Categories + Add Row

Answer Category *

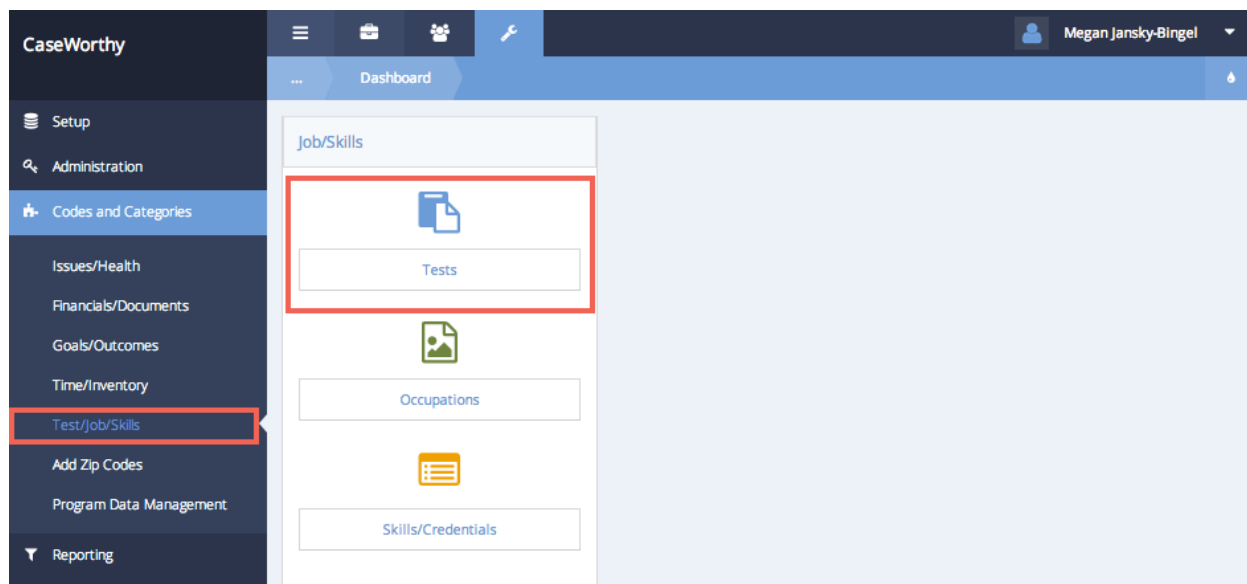
	Answer Description	Answer Category *	Organizations
<input checked="" type="checkbox"/>	01 One	Survey - 1 to 10	All None Choose Options...
<input checked="" type="checkbox"/>	02 Two	Survey - 1 to 10	All

Save Cancel

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.

Category *	Test Description *	Retest Days
Education	Advanced Nuclear Physics	
Education	Aptitude	0.00
Education	English	0.00
Education	Math	0.00
Education	PE	0.00
Education	Science	0.00

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.

SIC Reference	SIC Description	SIC Categories *
<input checked="" type="checkbox"/> 55-1000	Military Officer Special&Tactical Operations Ldr	55 Military Specific
<input checked="" type="checkbox"/> 11-2000	Advertising, Promotions, Marketing & Sales Mgrs	11 Management
<input checked="" type="checkbox"/> 13-1011	Agents and Business Mgr	13 Business and Financial
<input checked="" type="checkbox"/> 45-2000	Agricultural Workers	45 Farming, Fishing and Forestry
<input checked="" type="checkbox"/> 53-2000	Air Transportation Workers	53 Transportation and Material Moving
<input checked="" type="checkbox"/> 39-2000	Animal Care and Service Workers	39 Personal Care and Service
<input checked="" type="checkbox"/> 17-1000	Architects, Surveyors, and Cartographers	17 Architecture and Engineering
<input checked="" type="checkbox"/> 27-1000	Art and Design Workers	27 Arts, Design, Entertainment, Sports and Media
<input checked="" type="checkbox"/> 51-2000	Assemblers and Fabricators	51 Production
<input checked="" type="checkbox"/> 37-2000	Building Cleaning and Pest Control Workers	37 Building and Grounds Cleaning and Maintenance

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.

SIC Category Description *
<input checked="" type="checkbox"/> 11 Management
<input checked="" type="checkbox"/> 13 Business and Financial
<input checked="" type="checkbox"/> 15 Computer and Mathematical
<input checked="" type="checkbox"/> 17 Architecture and Engineering
<input checked="" type="checkbox"/> 19 Life, Physical and Social Science
<input checked="" type="checkbox"/> 21 Community and Social Services
<input checked="" type="checkbox"/> 23 Legal
<input checked="" type="checkbox"/> 25 Education, Training and Library
<input checked="" type="checkbox"/> 27 Arts, Design, Entertainment, Sports and Media
<input checked="" type="checkbox"/> 29 Healthcare Practitioners and Technical

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.

SIC Reference	SIC Description	SIC Categories *
55-1000	Military Officer Special&Tactical Operations L	55 Military Specific
11-2000	Advertising, Promotions, Marketing & Sales Mgrs	11 Management
13-1011	Agents and Business Mgr	13 Business and Financial
45-2000	Agricultural Workers	45 Farming, Fishing and Forestry
53-2000	Air Transportation Workers	53 Transportation and Material Moving
39-2000	Animal Care and Service Workers	39 Personal Care and Service
17-1000	Architects, Surveyors, and Cartographers	17 Architecture and Engineering
27-1000	Art and Design Workers	27 Arts, Design, Entertainment, Sports and Media
51-2000	Assemblers and Fabricators	51 Production
37-2000	Building Cleaning and Pest Control Workers	37 Building and Grounds Cleaning and

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.

CaseWorthy

Megan Jansky-Bingel

... Skill Types

Credential Types + Add Row

Total Rows: 78

	Description *	Credential Type *
<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>	Ability to Motivate and Assist	
<input checked="" type="checkbox"/>	Able to lift up to 40 lbs	
<input checked="" type="checkbox"/>	Able to work in hot, humid and loud environment	
<input checked="" type="checkbox"/>	Able to work in standing position for 7 hours	
<input checked="" type="checkbox"/>	Adding a new skill	
<input checked="" type="checkbox"/>	American Sign Language	
<input checked="" type="checkbox"/>	Barista	
<input checked="" type="checkbox"/>	Basic Computer Skills	

Save Cancel

The Skill 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.

CaseWorthy

Megan Jansky-Bingel

... Credential Types

Manage Categories + Add Row

	Credential Type *	Category	System ID
<input checked="" type="checkbox"/>	Maseter Carpenter Certification	All None Choose Options... Certification	
<input checked="" type="checkbox"/>	Associates Degree		3
<input checked="" type="checkbox"/>	Bachelor's Degree		4
<input checked="" type="checkbox"/>	Certification		2
<input checked="" type="checkbox"/>	GED		9
<input checked="" type="checkbox"/>	High School Diploma		8

Save Cancel

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.

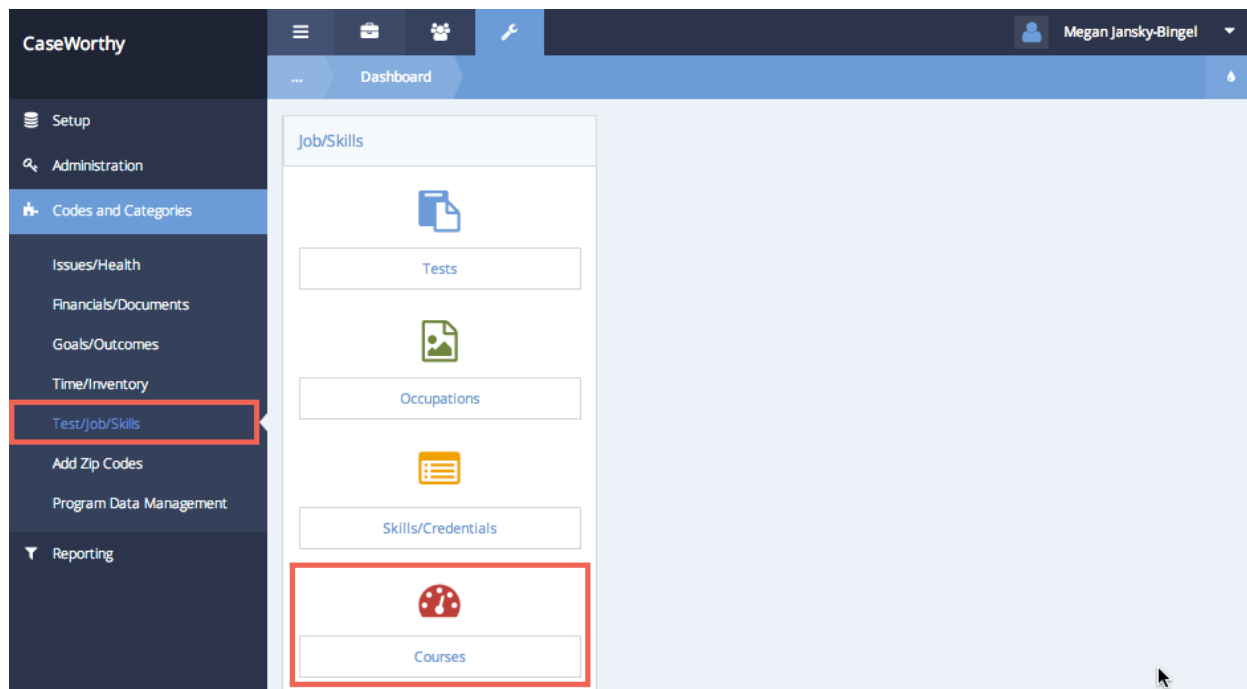
The screenshot displays the CaseWorthy System Administrator interface. The left sidebar contains navigation links: Setup, Administration, Codes and Categories (selected), Issues/Health, Financials/Documents, Goals/Outcomes, Time/Inventory, Test/Job/Skills, Add Zip Codes, Program Data Management, and Reporting. The main content area shows the 'Skill Types' table with a total of 78 rows. The table has two columns: 'Description *' and 'Credential Type *'. The 'Reading Blueprints' row is highlighted, and its dropdown menu is open, showing 'All', 'None', 'Choose Options...', and 'Master Carpenter Certification'. The 'Add Row' button in the top right and the 'Save' button at the bottom right are both highlighted with red boxes.

Description *	Credential Type *
<input checked="" type="checkbox"/> Reading Blueprints	All None Choose Options... Master Carpenter Certification
<input checked="" type="checkbox"/> Ability to Motivate and Assist	
<input checked="" type="checkbox"/> Able to lift up to 40 lbs	
<input checked="" type="checkbox"/> Able to work in hot, humid and loud environment	
<input checked="" type="checkbox"/> Able to work in standing position for 7 hours	

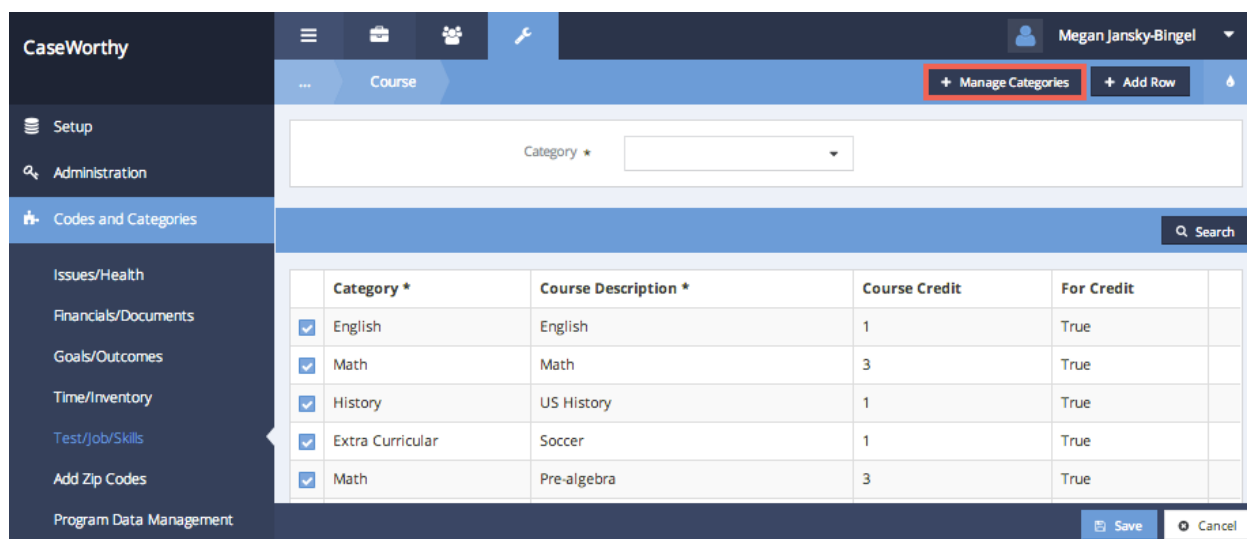
Courses

(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 Course 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.

Category Name
Foreign Language
English
Math
Extra Curricular
History
Science
Social Science

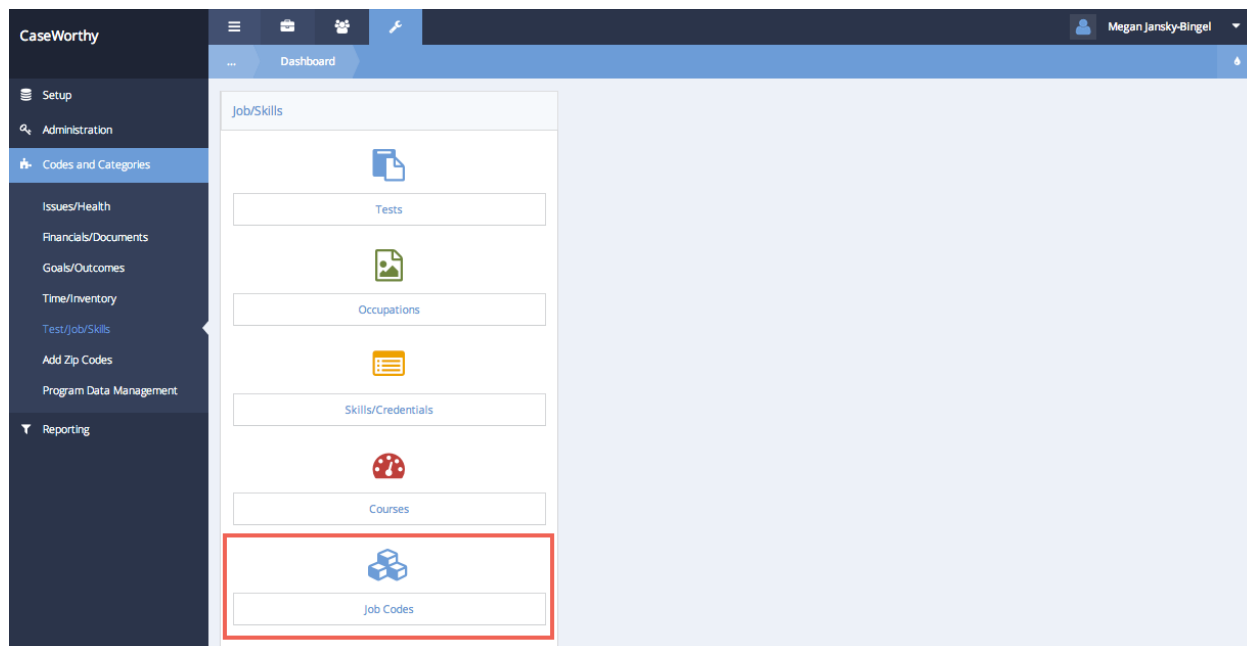
The Course form displays. To add a course, click the **+ Add Row** button. Add a row for each course to be entered. Enter a Category, Description, and Course Credit information. Enter Term Availability, Begin Date and/or End Date as applicable. When all desired courses have been entered click the **Save**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

Category *	Course Description *	Course Credit	For Credit
Foreign Language	Spanish III	5	<input checked="" type="checkbox"/>
English	English	1	True
Math	Math	3	True
History	US History	1	True

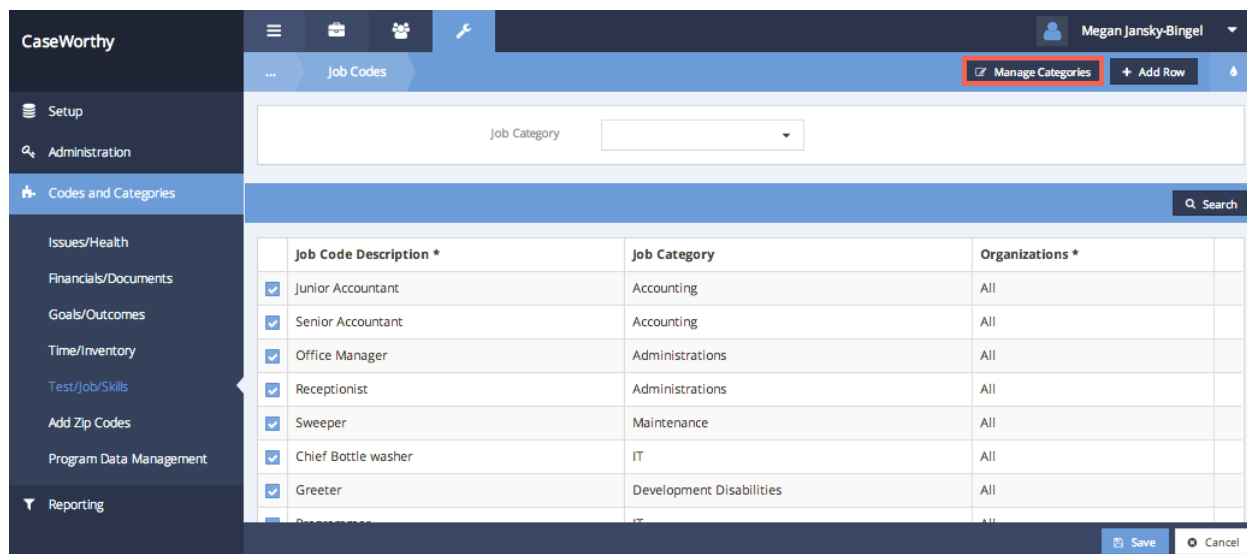
Job Codes

(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.

CaseWorthy

Megan Jansky-Bingel

Job Type Categories

+ Add Row

Job Category Description	
<input checked="" type="checkbox"/> Management	<input type="checkbox"/>
<input checked="" type="checkbox"/> Accounting	<input type="checkbox"/>
<input checked="" type="checkbox"/> IT	<input type="checkbox"/>
<input checked="" type="checkbox"/> Administrations	<input type="checkbox"/>
<input checked="" type="checkbox"/> Maintenance	<input type="checkbox"/>
<input checked="" type="checkbox"/> Development Disabilities	<input type="checkbox"/>
<input checked="" type="checkbox"/> HRMS	<input type="checkbox"/>

Save Cancel

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.

CaseWorthy

Megan Jansky-Bingel

Job Codes

Manage Categories + Add Row

Job Category

Search

Job Code Description *	Job Category	Organizations *
<input checked="" type="checkbox"/> Shift Supervisor	Management	<input checked="" type="checkbox"/> All <input type="checkbox"/> None Choose Options... CaseWorthy Community Health Resources
<input checked="" type="checkbox"/> Junior Accountant	Accounting	<input checked="" type="checkbox"/> All
<input checked="" type="checkbox"/> Senior Accountant	Accounting	<input checked="" type="checkbox"/> All

Save Cancel

Time/Inventory

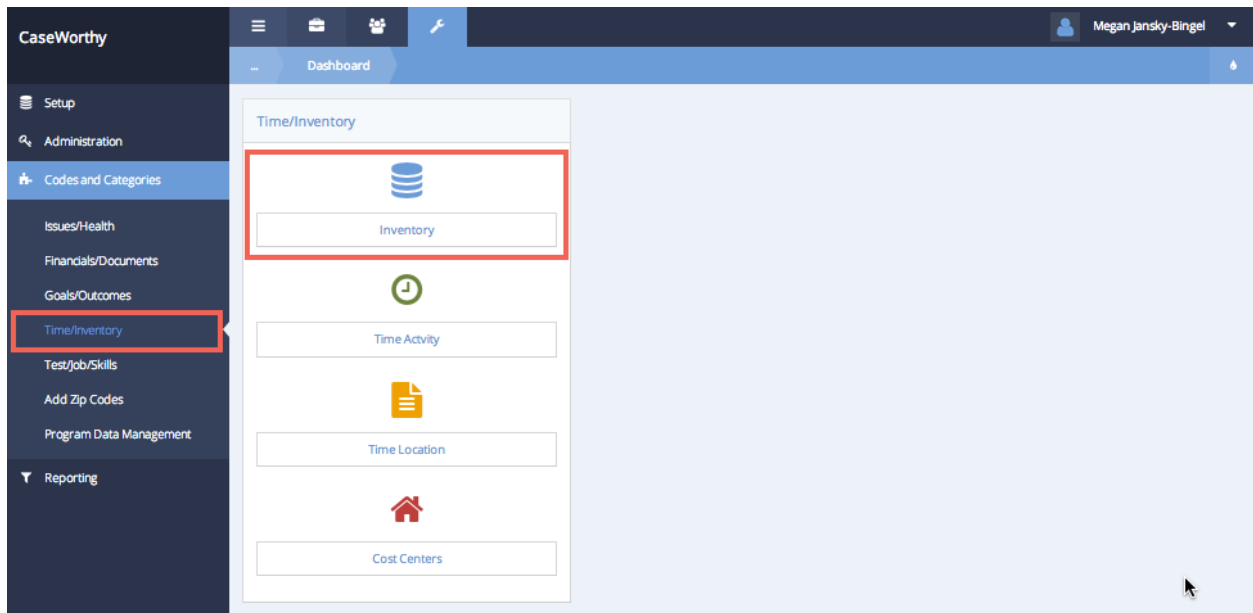
(Administration>Codes and Categories>Time/Inventory)

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.

CaseWorthy

Megan Jansky-Bingel

Inventory Summary

+ Add New Gift Card + Add New

Begin Date 11/21/2013 and 11/21/2014

Description Type

Total Rows: 0

Begin Date	Description	Status	Donor	Type	Year, Make, Model	Units	Total
Total Rows: 0							

Done

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.

CaseWorthy

Megan Jansky-Bingel

Add Inventory

Description * Red Leather Sofa

Inventory Status * New Location

Type * Furniture

Enter the time period during which the inventory item will be available.

Begin Date * 11/21/2014 End Date

Enter the beginning unit and rate information. The rate is updated based on the last purchase.

Unit of Measure * Each


Units * 1

Rate * 100

Total \$100.00

Upload Image Choose File No file chosen

Save Cancel

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.

CaseWorthy

Inventory Summary

Begin Date: 11/21/2013 and 11/21/2014

Description: Type:

Total Rows: 7

	Description	Status	Donor	Type	Year, Make, Model	Units	Total
<input type="checkbox"/> Edit	Red Leather Sofa	New		Furniture		1	\$100.00
<input type="checkbox"/> View Images	Walmart	New		Gift Cards		10	\$100.00
<input type="checkbox"/> View Dispositions	Jane	New	Jane, Davis	Clothing		1	\$50.00
<input type="checkbox"/> Delete	1998 Chevy Astro	New		Automobile	1998, Chevrolet, Astro	1	\$1.00
	1972 Ford Fusion	New		Automobile	1972, Ford, Fusion	1	\$1,500.00
	1989 Buick	New	Bred, Cody	Automobile	1978, Buick, LeSabre	1	\$1,500.00
	Metro Passes	New		Gift Cards		50	\$2.50

Done

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

CaseWorthy

Add Inventory

Description: Red Leather Sofa

Inventory Status: New Location:

Type: --Nothing-- New WIP Disposed Issued to Client

Begin Date: 11/21/2014 End Date: 11/21/2014

Unit of Measure: Each

Units: 1

Rate: 100.00

Total: \$100.00

Upload Image: No file chosen

Save Cancel

Gift Card Inventory


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

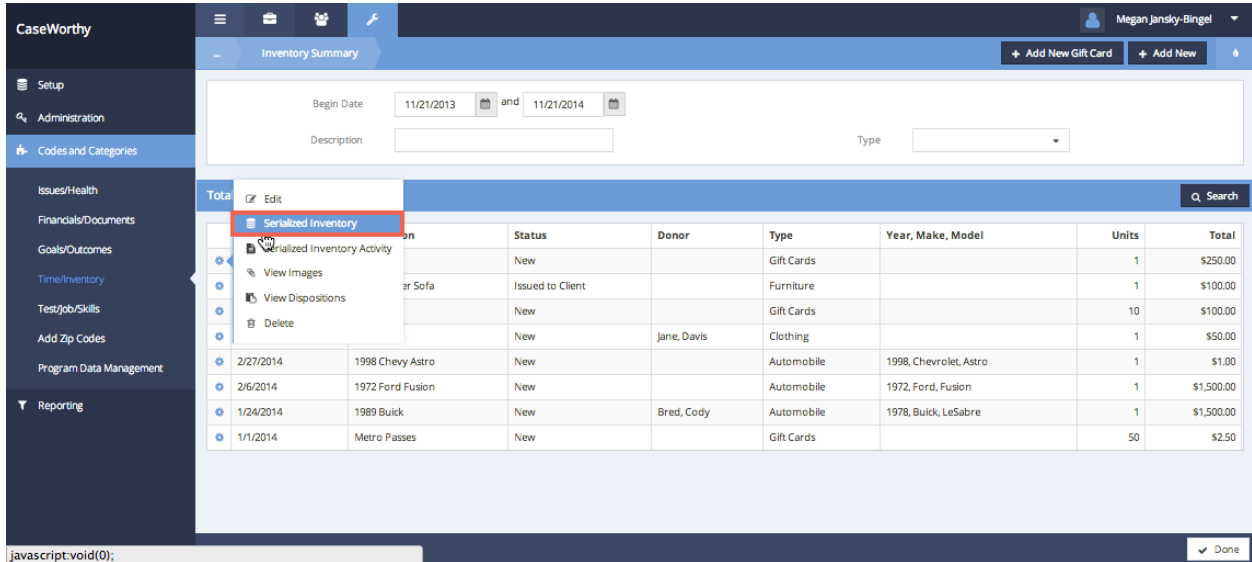
Begin Date	Description	Status	Donor	Type	Year, Make, Model	Units	Total
11/21/2014	Red Leather Sofa	Issued to Client		Furniture		1	\$100.00
5/14/2014	walmart	New		Gift Cards		10	\$100.00
3/20/2014	jane	New	Jane, Davis	Clothing		1	\$50.00
2/27/2014	1998 Chevy Astro	New		Automobile	1998, Chevrolet, Astro	1	\$1.00
2/6/2014	1972 Ford Fusion	New		Automobile	1972, Ford, Fusion	1	\$1,500.00
1/24/2014	1989 Buick	New	Bred, Cody	Automobile	1978, Buick, LeSabre	1	\$1,500.00
1/1/2014	Metro Passes	New		Gift Cards		50	\$2.50

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

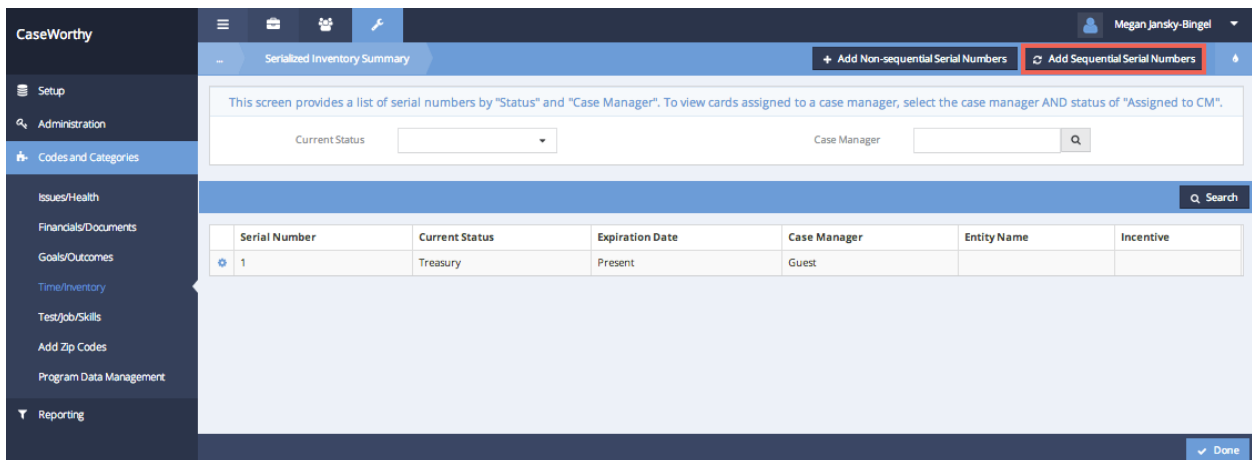
Simply click the action gear  next to the desired type/value and select “Serialized Inventory” to add more cards.



The screenshot shows the 'Inventory Summary' form in CaseWorthy. The left sidebar contains navigation options like Setup, Administration, Codes and Categories, and Reporting. The main area has filters for 'Begin Date' (11/21/2013 to 11/21/2014) and 'Description'. A table lists inventory items with columns: Status, Donor, Type, Year, Make, Model, Units, and Total. The first row is highlighted, and a context menu is open, showing 'Serialized Inventory' as the selected option.


Status	Donor	Type	Year, Make, Model	Units	Total
New		Gift Cards		1	\$250.00
Issued to Client		Furniture		1	\$100.00
New		Gift Cards		10	\$100.00
New	Jane, Davis	Clothing		1	\$50.00
2/27/2014	1998 Chevy Astro	Automobile	1998, Chevrolet, Astro	1	\$1.00
2/6/2014	1972 Ford Fusion	Automobile	1972, Ford, Fusion	1	\$1,500.00
1/24/2014	1989 Buick	Automobile	1978, Buick, LeSabre	1	\$1,500.00
1/1/2014	Metro Passes	Gift Cards		50	\$2.50

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



The screenshot shows the 'Serialized Inventory Summary' form. It includes a header with 'Add Non-sequential Serial Numbers' and 'Add Sequential Serial Numbers' buttons. Below is a text box explaining the screen's purpose. There are input fields for 'Current Status' and 'Case Manager'. A table displays one row of data with columns: Serial Number, Current Status, Expiration Date, Case Manager, Entity Name, and Incentive.

Serial Number	Current Status	Expiration Date	Case Manager	Entity Name	Incentive
1	Treasury	Present	Guest		

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.

CaseWorthy

Megan Jansky-Bingel

Add Sequential Card Creation

This form will automatically create a series of Gift Cards in sequential order. Identify the number of cards you choose to create and enter the starting sequential number.

User Holding Card * Alfseay

Expiration * Present 12/31/9999

Starting Sequential Number * 100900

Number of Sequential Cards * 175


Status * Treasury

Inventory Details

Card Description Target

Save Cancel

Adding Non-Sequential Serial Numbers

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

CaseWorthy

Megan Jansky-Bingel

Inventory Summary

Begin Date 11/21/2013 and 11/21/2014

Description

Type

+ Add New Gift Card + Add New

Total	Edit	Description	Status	Donor	Type	Year, Make, Model	Units	Total
	Serialized Inventory		New		Gift Cards		1	\$250.00
	Serialized Inventory Activity	er Sofa	Issued to Client		Furniture		1	\$100.00
	View Images		New		Gift Cards		10	\$100.00
	View Dispositions		New	Jane, Davis	Clothing		1	\$50.00
	Delete		New		Automobile	1998, Chevrolet, Astro	1	\$1.00
2/27/2014		1998 Chevy Astro	New		Automobile	1972, Ford, Fusion	1	\$1,500.00
2/6/2014		1972 Ford Fusion	New		Automobile	1978, Buick, LeSabre	1	\$1,500.00
1/24/2014		1989 Buick	New	Bred, Cody	Automobile		1	\$1,500.00
1/1/2014		Metro Passes	New		Gift Cards		50	\$2.50

Done

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

Serialized Inventory Summary

+ Add Non-sequential Serial Numbers + Add Sequential Serial Numbers

This screen provides a list of serial numbers by "Status" and "Case Manager". To view cards assigned to a case manager, select the case manager AND status of "Assigned to CM".

Current Status Case Manager

Search

Serial Number	Current Status	Expiration Date	Case Manager	Entity Name	Incentive
1	Treasury	Present	Guest		

Done

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.

Enter Serialized Inventory

+ Add Row

Search

Serial Number *	Status *	Expiration Date *	User Holding Card *
256487	Treasury	Present	Allseay
1	Treasury	Present	Guest

Save Cancel

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.

CaseWorthy

Inventory Summary

Begin Date: 11/21/2013 and 11/21/2014

Description:

Type:

Total Rows: 2

Serial Number	Status	Donor	Type	Year, Make, Model	Units	Total
256487	New		Gift Cards		1	\$250.00
1998 Chevy Astro	Issued to Client		Furniture		1	\$100.00
1972 Ford Fusion	New		Gift Cards		10	\$100.00
1989 Buick	New	Jane, Davis	Clothing		1	\$50.00
2/27/2014	New		Automobile	1998, Chevrolet, Astro	1	\$1.00
2/6/2014	New		Automobile	1972, Ford, Fusion	1	\$1,500.00
1/24/2014	New	Bred, Cody	Automobile	1978, Buick, LeSabre		

Done

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.

CaseWorthy

Serialized Inventory Activity

Status Search: Treasury

Total Rows: 2

Serial Number	Status *	Expiration Date	Case Manager / Current Owner
256487	Treasury	Present 12/31/9999	Seay, Alfonso
1	Treasury	Present	Guest, Guest

Program:

Service:

Save Cancel

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”.

CaseWorthy

Serialized Inventory Summary

+ Add Non-sequential Serial Numbers + Add Sequential Serial Numbers

This screen provides a list of serial numbers by "Status" and "Case Manager". To view cards assigned to a case manager, select the case manager AND status of "Assigned to CM".

Current Status Case Manager

Search

	Current Status	Expiration Date	Case Manager	Entity Name	Incentive
View History	Treasury	Present	Alfseay		
Delete	Treasury	Present	Guest		

Done

The Serialized History View form displays.

CaseWorthy

Serialized History View

Activity Type

Search

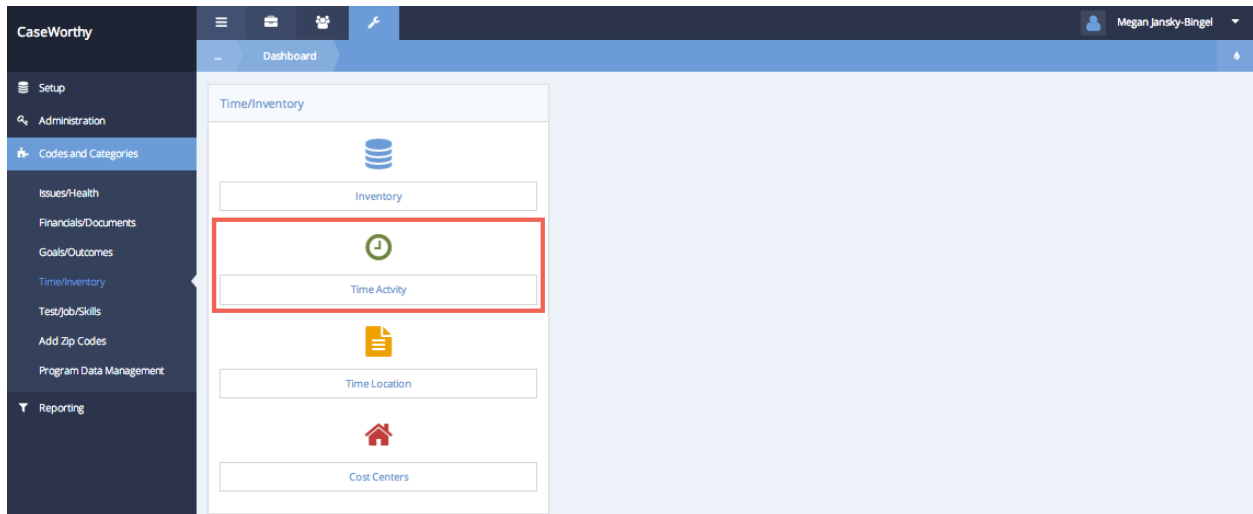
Client	Description	Serial#	CreatedDate	Activity Type	Case Manager
	Target	256487	11/21/2014	Treasury	Alfseay

Done

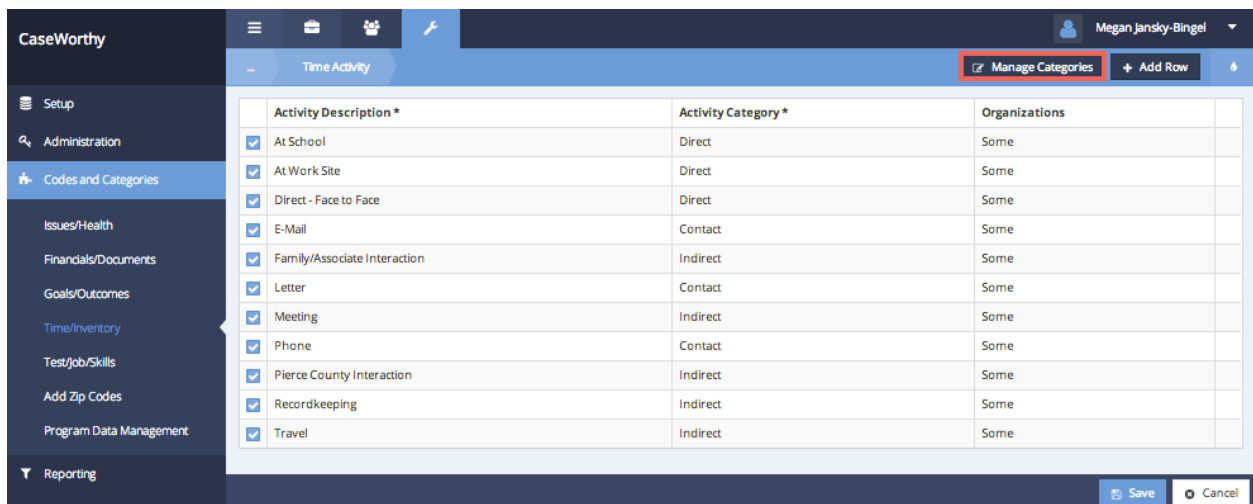
Time Activity

(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.



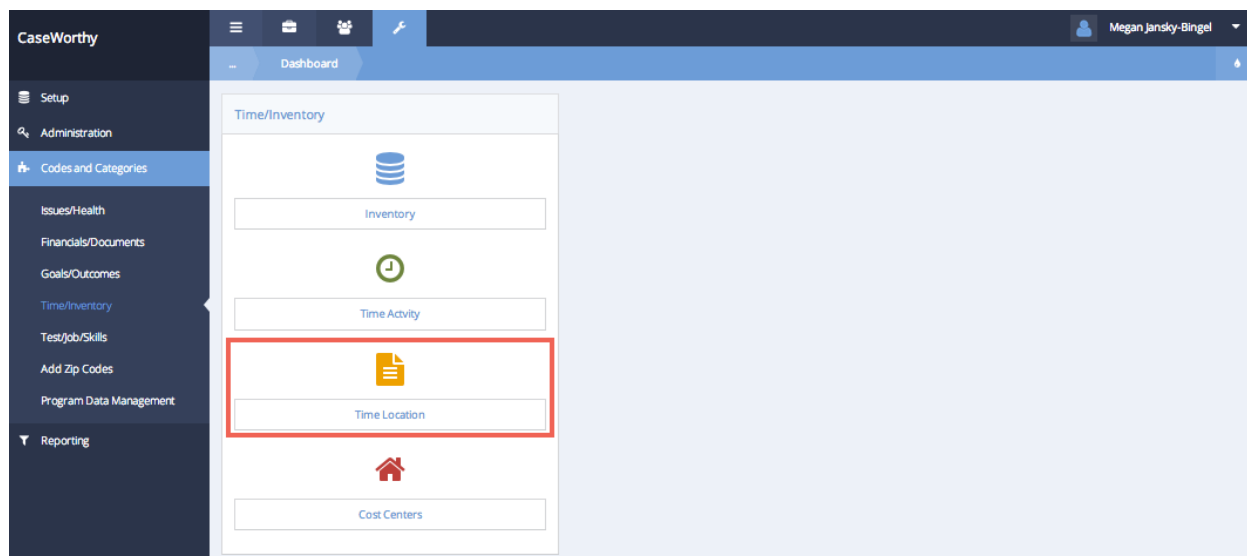
The Activity Category form displays. To add a category, click the **+ Add Row** button. Add a row for each activity category to be entered. Enter the category description. Click **Save** when all desired activity categories have been entered.

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.

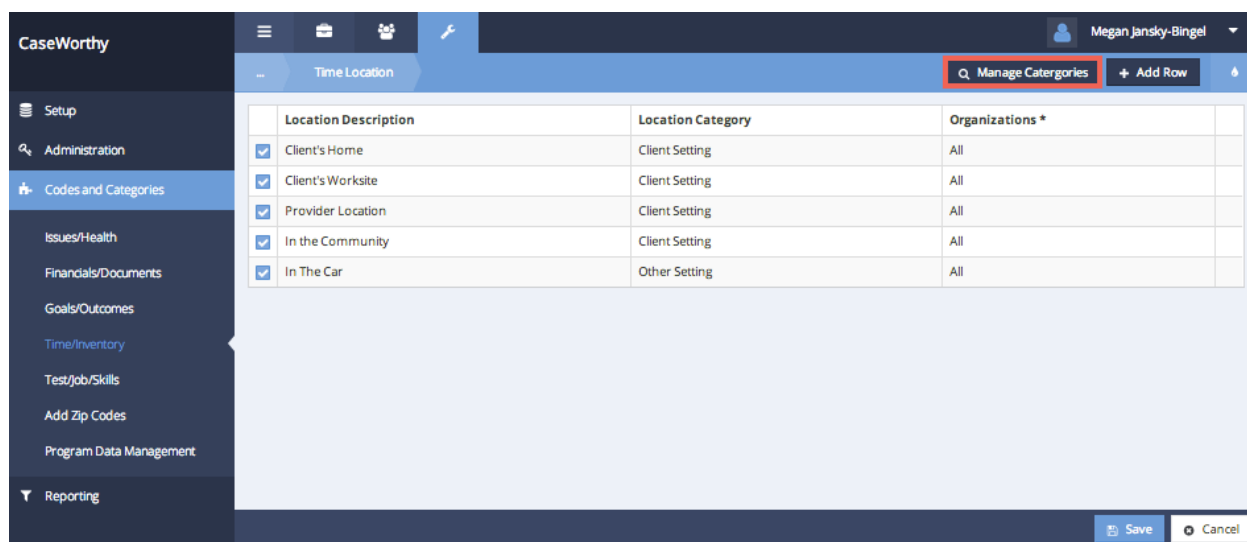
Time Location

(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.



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.

CaseWorthy

Megan Jansky-Bingel

Time Category

+ Add Row

Location Category Description
<input checked="" type="checkbox"/> Client Setting
<input checked="" type="checkbox"/> Other Setting
<input checked="" type="checkbox"/> Provider Setting

Done

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.

CaseWorthy

Megan Jansky-Bingel

Time Location

Manage Categories + Add Row

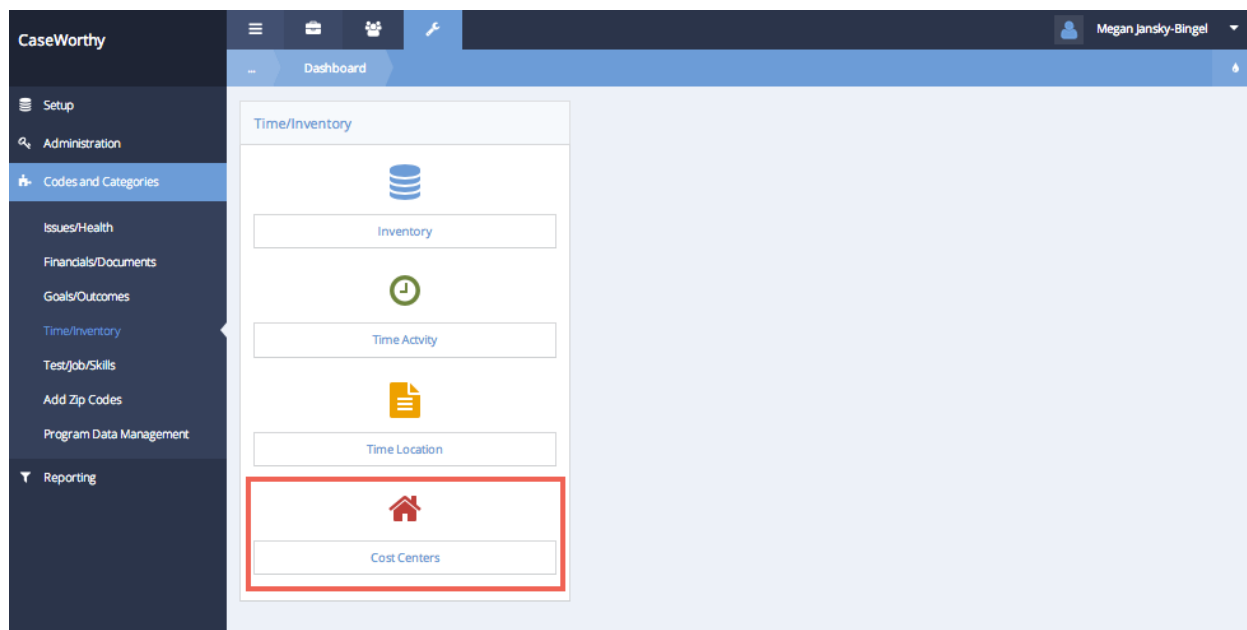
Location Description	Location Category	Organizations *
<input checked="" type="checkbox"/> Client's Home	Client Setting	All None Choose Options... CaseWorthy Community Health Resources
<input checked="" type="checkbox"/> Client's Worksite	Client Setting	All
<input checked="" type="checkbox"/> Provider Location	Client Setting	All
<input checked="" type="checkbox"/> In the Community	Client Setting	All
<input checked="" type="checkbox"/> In The Car	Other Setting	All

Save Cancel

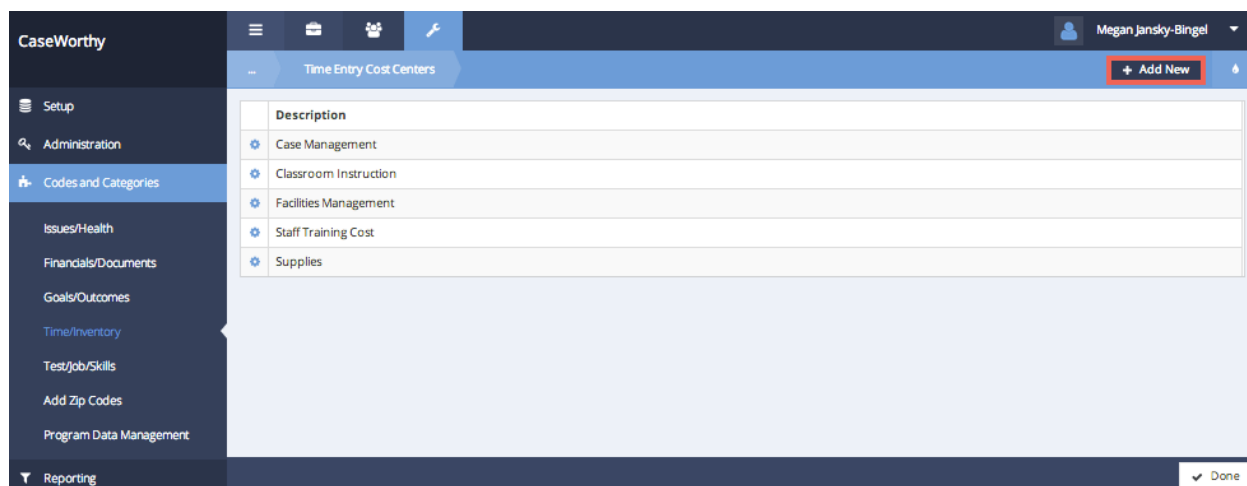
Cost Centers

(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

Description: Case Management

Organizations: All None

Choose Options...

CaseWorthy

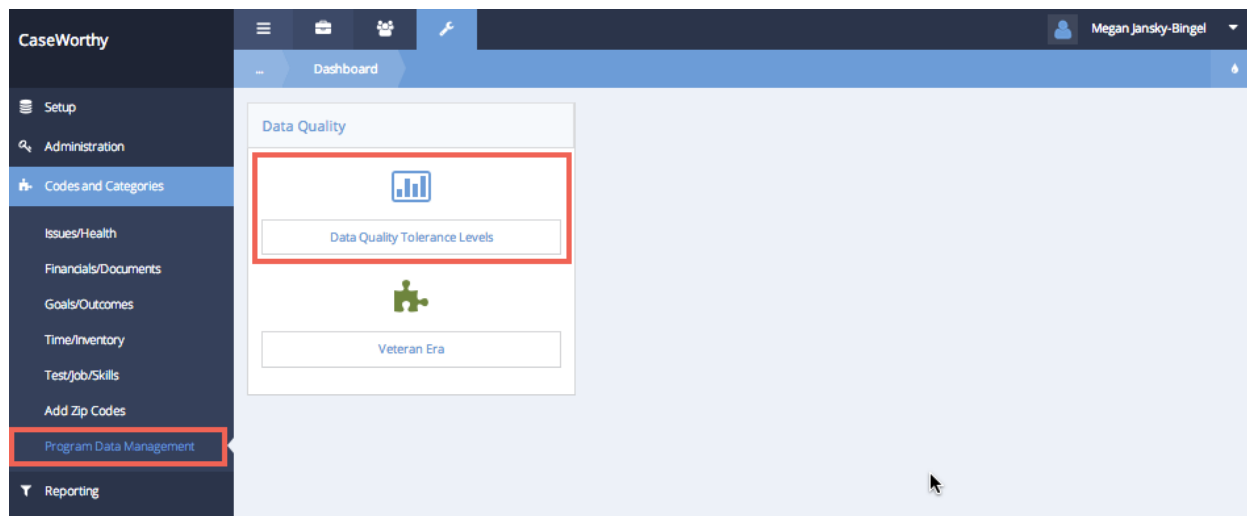
Community Health Resources

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 icon next to the desired program and select "Edit".

CaseWorthy

Setup

Administration

Codes and Categories

Issues/Health

Financials/Documents

Goals/Outcomes

Time/Inventory

Test/Job/Skills

Add Zip Codes

Program Data Management

Reporting

javascript:void(0);

Data Quality Tolerance

Click the action gear and then Edit to edit tolerance levels by each program type.

HMIS Program Type	HMIS ProgramTypeID
CoC	0
CoC	1
Transitional Housing	2
Permanent Supportive Housing	3
Homeless Outreach	4
Services Only program	6
Other	7
Safe Haven	8
Permanent Housing	9
Innovative Supportive Housing	11

Done

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.

CaseWorthy

Setup

Administration

Codes and Categories

Issues/Health

Financials/Documents

Goals/Outcomes

Time/Inventory

Test/Job/Skills

Add Zip Codes

Program Data Management

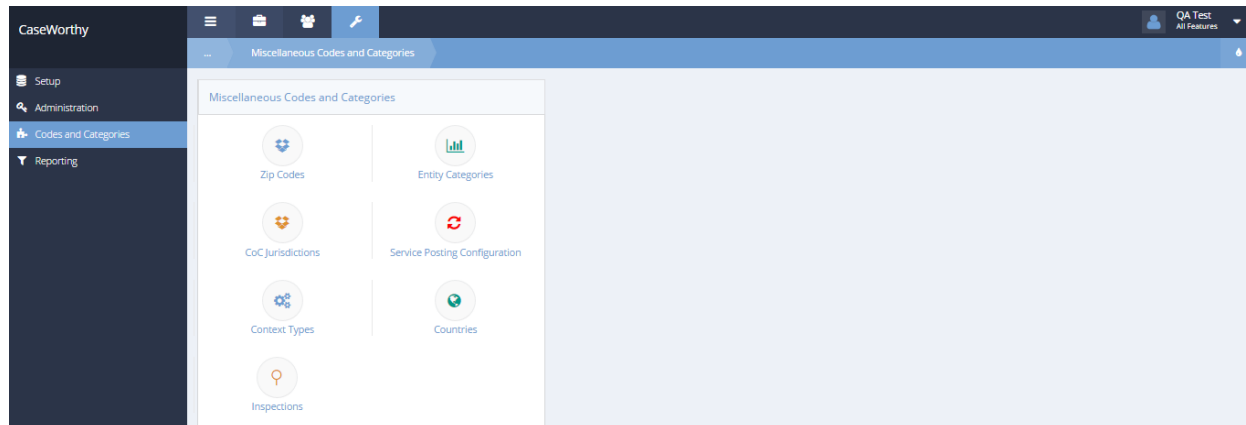
Reporting

Edit Data Quality Tolerance

DataElement	Dont Know or Refused (%)	Missing Tolerance (%)
<input checked="" type="checkbox"/> First Name	0	0
<input checked="" type="checkbox"/> Last Name	0	0
<input checked="" type="checkbox"/> SSN	7	25
<input checked="" type="checkbox"/> Date of Birth	0	0
<input checked="" type="checkbox"/> Ethnicity	0	0
<input checked="" type="checkbox"/> Race	0	0
<input checked="" type="checkbox"/> Gender	0	0
<input checked="" type="checkbox"/> Veteran Status - Adults Only	0	0
<input checked="" type="checkbox"/> Disabling Condition	0	0
<input checked="" type="checkbox"/> Residence Prior to Program Entry	0	0
<input checked="" type="checkbox"/> Length of Stay at Prior Residence	0	0

Save Cancel

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.

A screenshot of the 'Find Zip Code' form in the CaseWorthy application. The form has a header bar with a search icon and a '+ Add New' button. Below the header, there are three input fields labeled 'Zip Code', 'City', and 'State'. At the bottom right of the form, there is a 'Search' button.

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

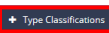


The screenshot displays the CaseWorthy System Administrator interface. On the left is a dark blue sidebar with a menu containing: Setup, Administration, Codes and Categories (highlighted), Issues/Health, Financials/Documents, Goals/Outcomes, Time/Inventory, Test/Job/Skills, Add Zip Codes, Program Data Management, and Reporting. The top header bar includes the CaseWorthy logo, navigation icons, and a user profile for Megan Jansky-Bingel. The main content area is titled 'Add Zip Code' and contains a form with the following fields: 'Zip Code *' (a large text input), 'City *' (a text input), 'State *' (a dropdown menu with a search icon), and 'County *' (a text input). At the bottom right of the form area are 'Save' and 'Cancel' buttons.



Entity Categories

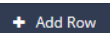

(Administration>Codes and Categories>Other)




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  button. The Entity Class Types form displays.

Entity Categories					
	Description	Type Classification	System ID		
<input checked="" type="checkbox"/>	Observe Taking Medications		1		
<input checked="" type="checkbox"/>	High Risk		3		

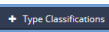



To edit an existing type, click the blue checkbox . The description field becomes editable. To delete a row, click the  icon and confirm on the pop-up dialog.

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

Entity Class Types				
	Description	System ID		
	<input type="text"/>	<input type="text"/>		
<input checked="" type="checkbox"/>	Medication	1		

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



Click  to add a new category. Enter a description and select a type. Click  when done.

Entity Categories					
	Description	Type Classification	System ID		
	<input type="text"/>	Choose Options... <div><div></div></div>	<input type="text"/>		
<input checked="" type="checkbox"/>	Observe Taking Medications		1		
<input checked="" type="checkbox"/>	High Risk		3		

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.

... CoC Jurisdictions + Add Row		
Description	Jurisdiction Code	System ID
<input checked="" type="checkbox"/> Area 1	1	1
<input checked="" type="checkbox"/> Area 2	2	4
<input checked="" type="checkbox"/> Area 3	3	5
<input checked="" type="checkbox"/> Cameron and Kathleen AHAR Demonstration	4	6

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

... CoC Jurisdictions + Add Row		
Description	Jurisdiction Code	System ID
<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/> Area 1	1	1
<input checked="" type="checkbox"/> Area 2	2	4
<input checked="" type="checkbox"/> Area 3	3	5
<input checked="" type="checkbox"/> Cameron and Kathleen AHAR Demonstration	4	6

Countries

Objective: Create Country codes.

Navigation: Administration>Codes and Categories>Miscellaneous>Countries

The Countries form displays

... Countries			+ Add Row	
Total Rows: 191				
<input checked="" type="checkbox"/>	Country	Sort Order	Country ID	
<input checked="" type="checkbox"/>	Afghanistan	1	1	
<input checked="" type="checkbox"/>	Albania	2	2	
<input checked="" type="checkbox"/>	Algeria	3	3	
<input checked="" type="checkbox"/>	Angola	4	4	
<input checked="" type="checkbox"/>	Antigua	5	5	
<input checked="" type="checkbox"/>	Argentina	6	6	
<input checked="" type="checkbox"/>	Armenia	7	7	
<input checked="" type="checkbox"/>	Australia	8	8	
<input checked="" type="checkbox"/>	Austria	9	9	
<input checked="" type="checkbox"/>	Azerbaijan	10	10	
<input checked="" type="checkbox"/>	Bahamas	11	11	
<input checked="" type="checkbox"/>	Bahrain	12	12	
<input checked="" type="checkbox"/>	Bangladesh	13	13	
<input checked="" type="checkbox"/>	Barbados	14	14	
<input checked="" type="checkbox"/>	Belarus	15	15	
<input checked="" type="checkbox"/>	Belgium	16	16	
			Save	Cancel

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.

... Countries			+ Add Row	
Total Rows: 1				
<input checked="" type="checkbox"/>	Country	Sort Order	Country ID	
<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="x"/>
<input checked="" type="checkbox"/>	Afghanistan	1	1	
<input checked="" type="checkbox"/>	Albania	2	2	

Context Types

Objective: Create Context Type codes.

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

The Context Types form displays.

Context Types			Search	
Total Rows: 156			+ Add Row	
	Context Type Description	Sort Order	ContextTypeID	
<input checked="" type="checkbox"/>	Course	215	215	
<input checked="" type="checkbox"/>	Job Club Groups	214	214	
<input checked="" type="checkbox"/>	Inspection Detail	213	213	
<input checked="" type="checkbox"/>	Assess Course	212	212	
<input checked="" type="checkbox"/>	Housing	211	211	
<input checked="" type="checkbox"/>	Inspection	210	210	
<input checked="" type="checkbox"/>	Reference Check	209	209	
<input checked="" type="checkbox"/>	Assess Financial Item	208	208	
<input checked="" type="checkbox"/>	Assess Test	207	207	
<input checked="" type="checkbox"/>	Test	206	206	
<input checked="" type="checkbox"/>	Inspection Type	205	205	
<input checked="" type="checkbox"/>	Portal User	204	204	
<input checked="" type="checkbox"/>	BatchID	203	203	
<input checked="" type="checkbox"/>	ContextJobType	202	202	
<input checked="" type="checkbox"/>	NewsFeed	200	200	
<input checked="" type="checkbox"/>	Contact Log	161	161	
			Save	Cancel

Use the **+ Add Row** button to add a new context type to the list. The row expands to enter the name and sort order of the context type.

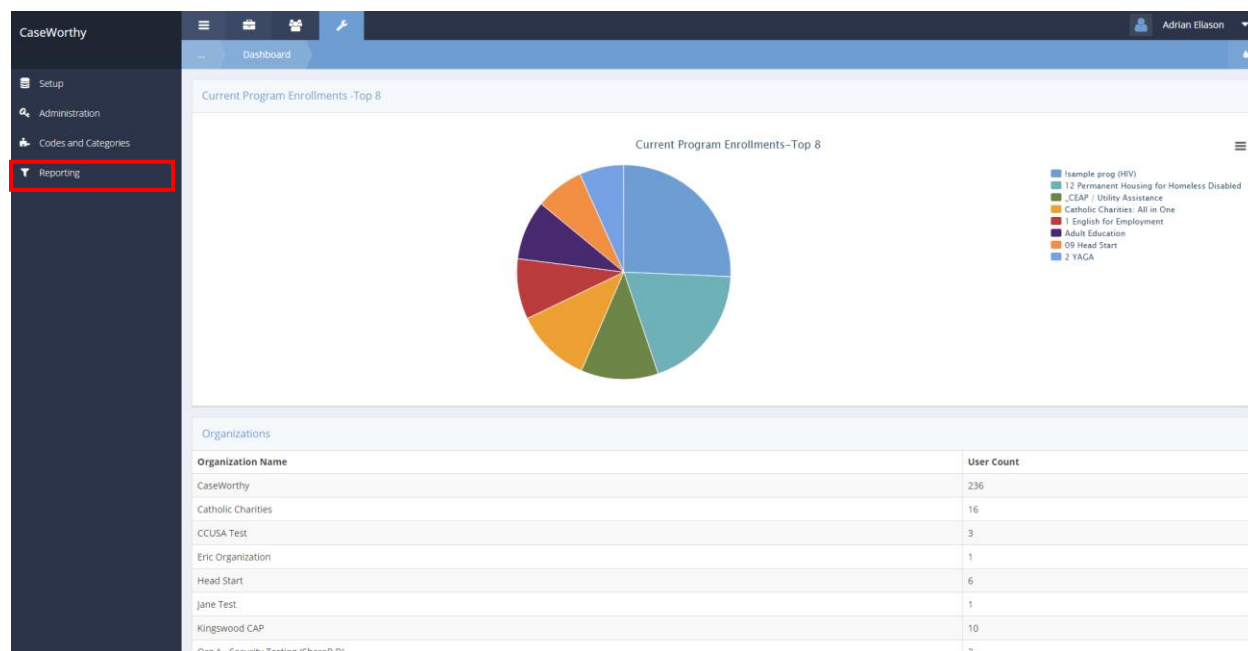
Context Types			Search	
Total Rows: 1			+ Add Row	
	Context Type Description	Sort Order	ContextTypeID	
<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	Course	215	215	
<input checked="" type="checkbox"/>	Job Club Groups	214	214	

Reporting

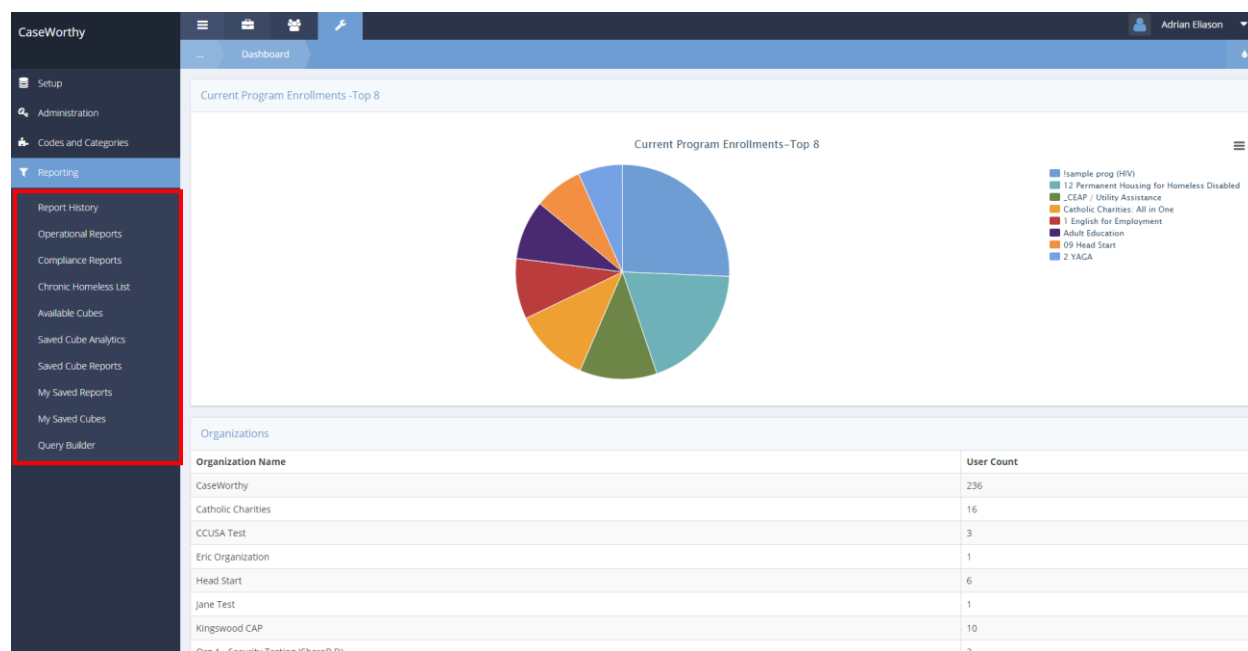
(Administration>Reporting)

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:

... Clients Served Report

Save Report Parameters [Edit](#) [Save](#)

Enter the date range of services.

Begin Date * End Date *

Select all or some Organizations, Programs, Accounts, Service Types, and Case Managers.

Organization(s) * ☒ All ☐ Some Program(s) * ☒ All ☐ Some Account(s) * ☒ All ☐ Some

Service Type(s) * ☒ All ☐ Some Provider Location(s) * ☒ All ☐ Some Case Manager(s) * ☒ All ☐ Some

Select all or some client demographic information. The report will only return records matching the selected criterion. Note: Region represents the Geographic Region of the Client's Address at time of Service

Age Groups * ☒ All ☐ Some Race * ☒ All ☐ Some Ethnicity * ☒ All ☐ Some

Gender * ☒ All ☐ Some Region(s) * ☒ All ☐ Some

Select the primary sort (Group By) order.

Group By *

[Report](#) [Done](#)

Program Summary:

... Program Summary Report

Save Report Parameters [Edit](#) [Save](#)

Enter the begin and end date of the quarter or year.



Start Date * End Date *

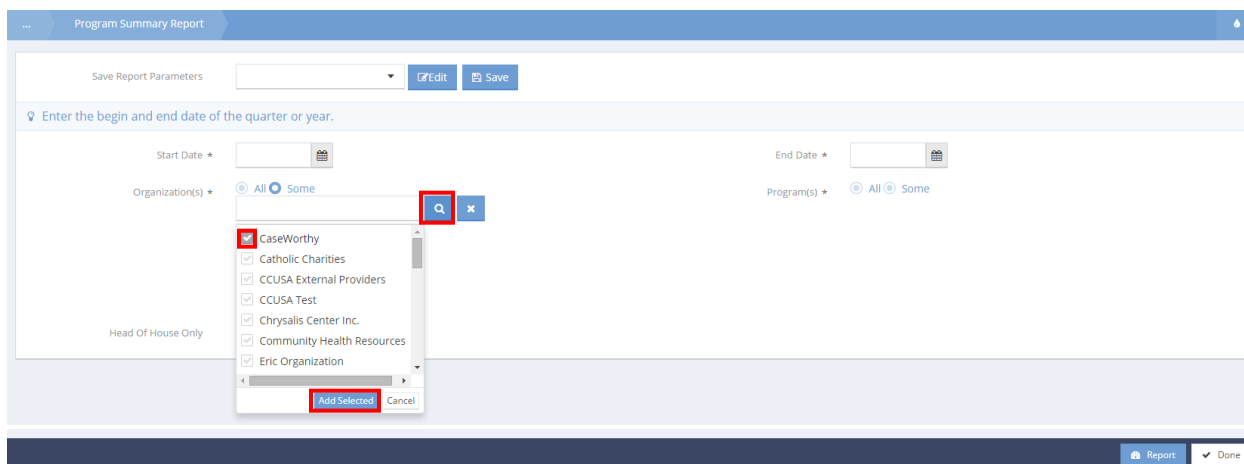
Organization(s) * ☒ All ☐ Some Program(s) * ☒ All ☐ Some

Head Of House Only ☐

[Report](#) [Done](#)

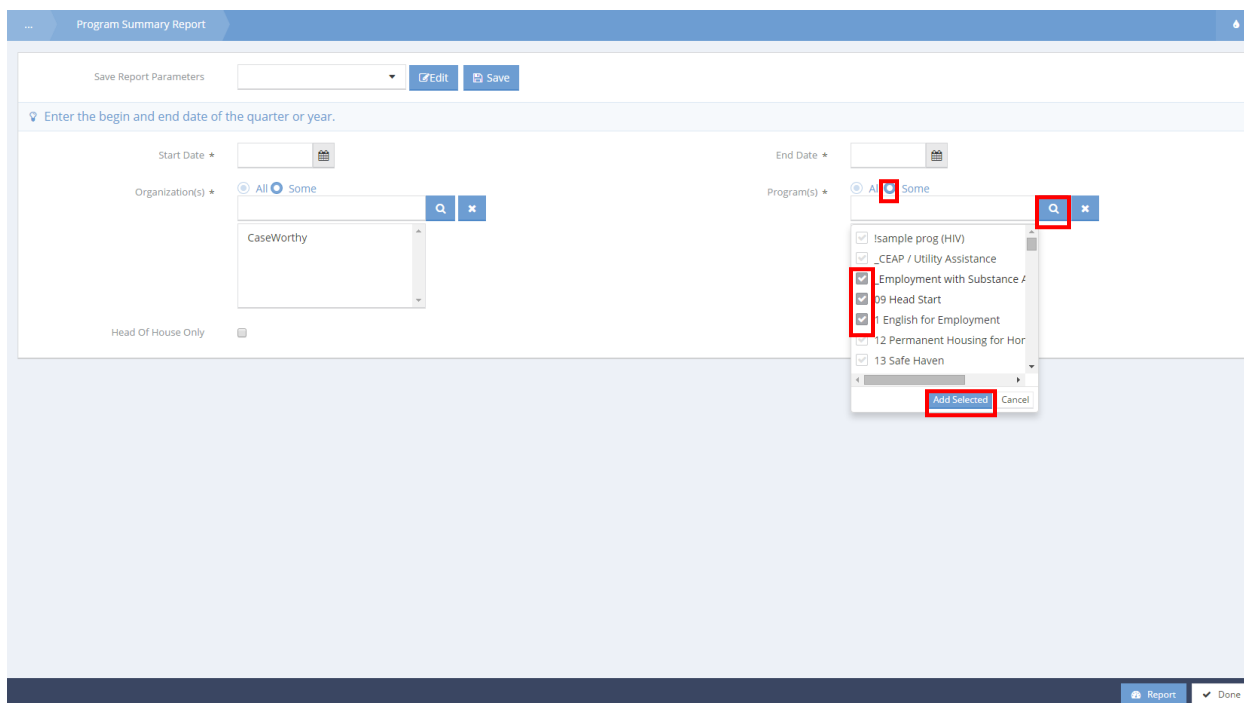
Some reports have numerous filtering options while others have very few. The date ranges are left blank, but the cascading filters are always defaulted to “All”. When filtering data, or setting up the launch criteria, always start from the top left and work over and down. The fields are set up so that 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.




The screenshot shows the 'Program Summary Report' form. The 'Organization(s)' field is set to 'Some', and its dropdown menu is open, displaying a list of organizations with checkboxes. The 'Add Selected' button at the bottom of the dropdown is highlighted with a red box. Other fields like 'Start Date', 'End Date', and 'Program(s)' are also visible.

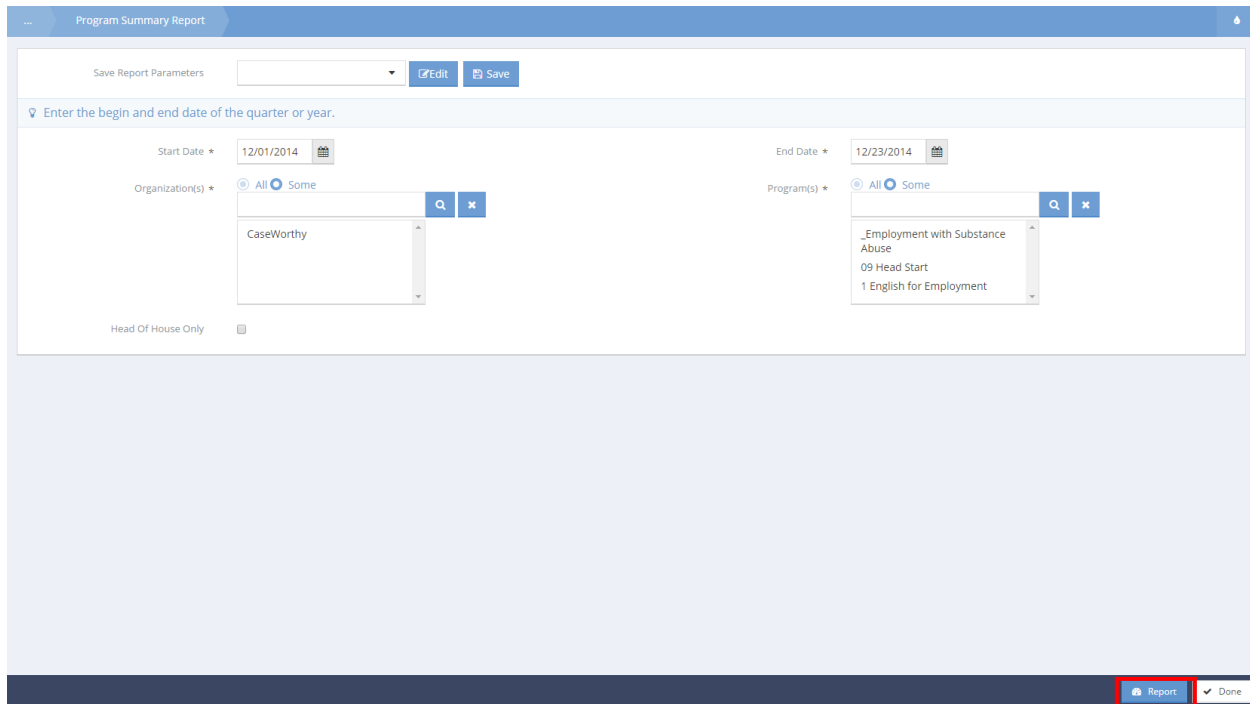
With one level of criteria set, move to the next field and make a selection. Once a field has been changed from “All” to “Some” and if “All” is the desired setting, simply click back onto “All”.



This screenshot shows the same 'Program Summary Report' form, but now the 'Program(s)' field is set to 'Some' and its dropdown menu is open. The dropdown lists various programs with checkboxes. The 'Add Selected' button at the bottom of the dropdown is highlighted with a red box. The 'Organization(s)' dropdown is now closed and shows 'CaseWorthy'.

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.



Program Summary Report

Save Report Parameters

Enter the begin and end date of the quarter or year.

Start Date * 12/01/2014

End Date * 12/23/2014

Organization(s) * ☐ All ☒ Some

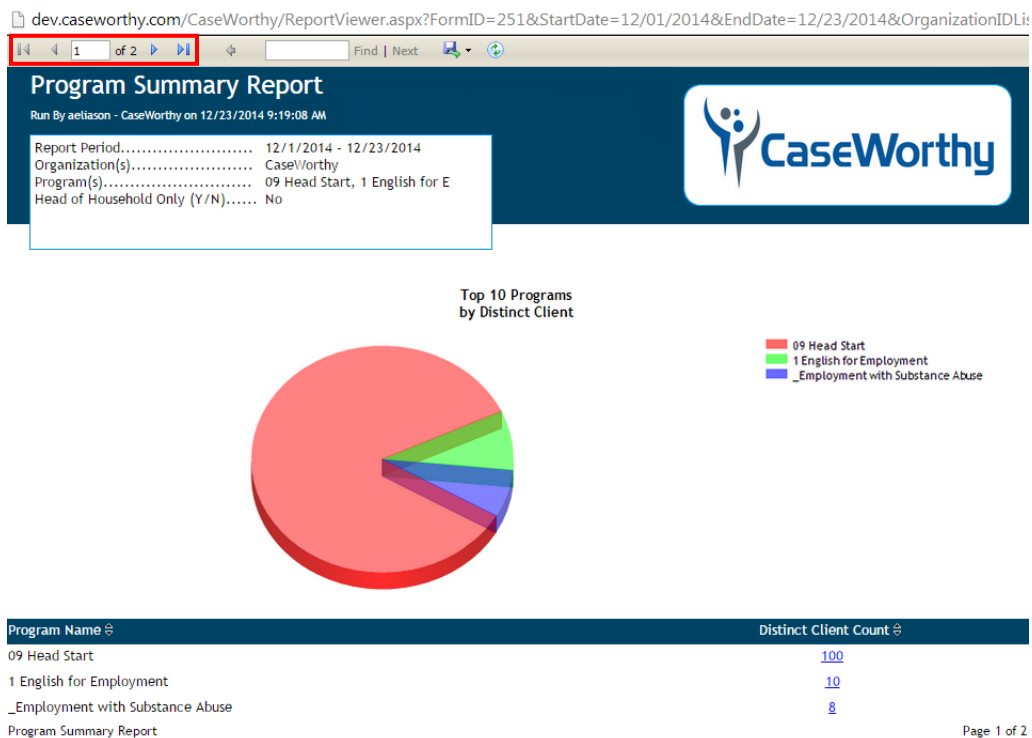
CaseWorthy

Program(s) * ☐ All ☒ Some

_Employment with Substance Abuse
09 Head Start
1 English for Employment

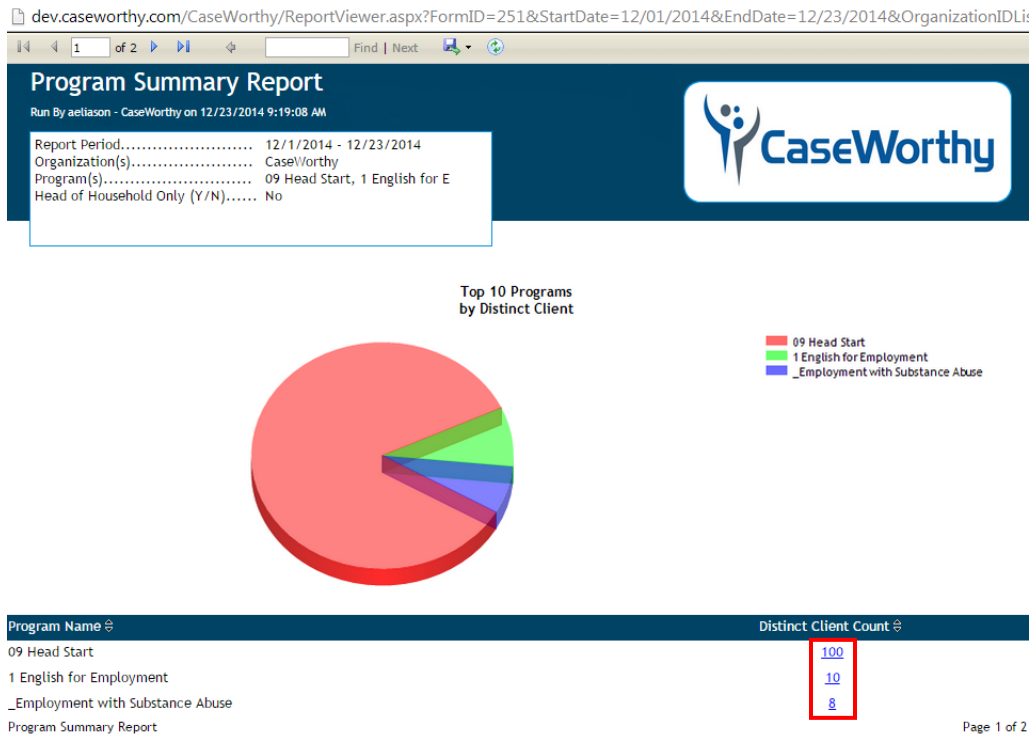
Head Of House Only ☐

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&OrganizationID=...

1 of 4

Program Summary Detail

Run By aetiason - 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




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.

dev.caseworthy.com/CaseWorthy/ReportViewer.aspx?FormID=251&StartDate=12/01/2014&EndDate=12/23/2014&OrganizationIDLi

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

XML file with report data
 CSV (comma delimited)
PDF
 MHTML (web archive)
 Excel
 TIFF file
 Word

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

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.

dev.caseworthy.com/CaseWorthy/ReportViewer.aspx?FormID=251&StartDate=12/01/2014&EndDate=12/23/2014&OrganizationIDLi

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

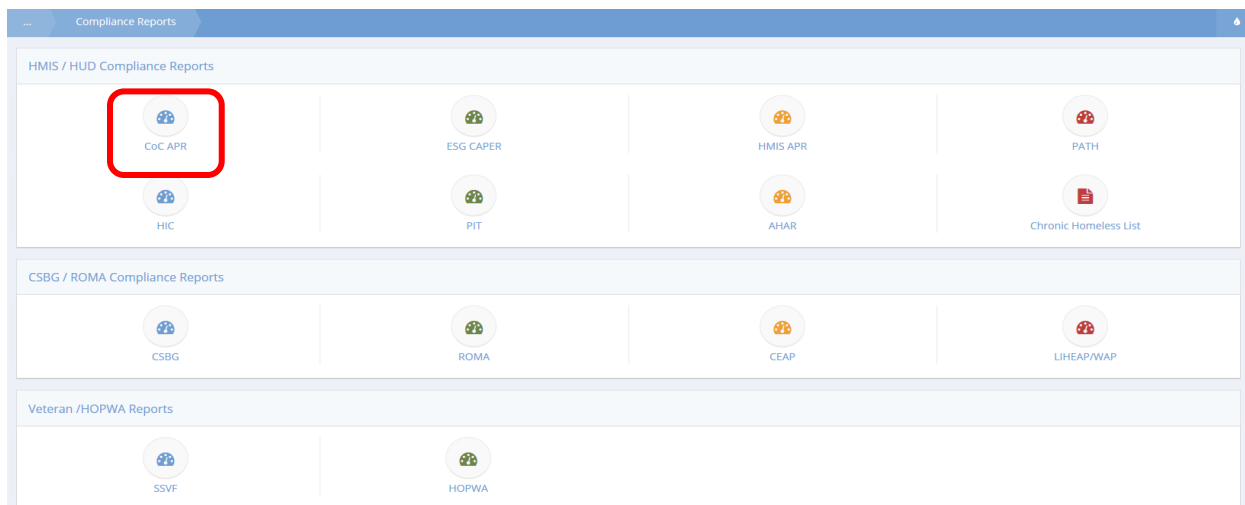
09 Head Start

Distinct Client Count
100

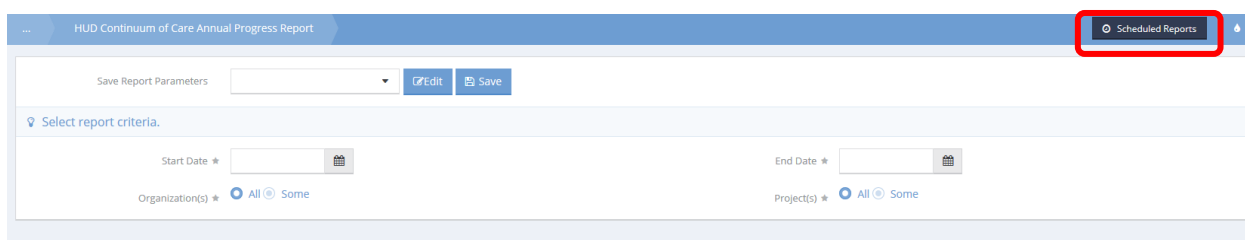
Full Name	Family Name	SSN	Age	Begin Date	End Date
Po Tak 'Kai	Tak 'Kai, Po-1945-01-01	xxx-xx-7092	48	08/16/2011	12/31/9999
Po Tak 'Kai	Tak 'Kai, Po-1945-01-01	xxx-xx-7092	48	05/21/2013	12/31/9999
Kimbo Kingswood	Kingswood, Kimbo-1975-01-01	xxx-xx-5098	39	12/11/2014	12/31/9999
Erwin Arden	Arden, Eve-1945-01-01	Unknown	9	05/17/2011	12/31/9999
Erwin Arden	Arden, Eve-1945-01-01	Unknown	9	09/23/2014	12/31/9999
James Arlon	Arlon, James-1954-04-15	xxx-xx-5454	60	07/25/2014	12/31/9999

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.

Schedule New Report

Schedule Report

Report Description *

Teams Choose Options...

Email Template *

Report Format * PDF

Number To Keep * 5

Report Frequency and Scheduling Information

Frequency Type * Months

Frequency 1

Start Date * 06/29/2015

Start Time * 12 AM

End Date *

Report Parameters

Start Date *

End Date *

Organization(s) * All Some

Project(s) * All Some

Disable Report

Disable

Save Cancel

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  Save button when finished.

Scheduled Reports

Description	Created	Created By	Last Modified	Last Modified By
<input checked="" type="checkbox"/> test	6/29/2015 12:22 PM	Adrian Eliason	6/29/2015 12:23 PM	Adrian Eliason

Download Reports

(Administration>Reporting>Download Scheduled Reports)

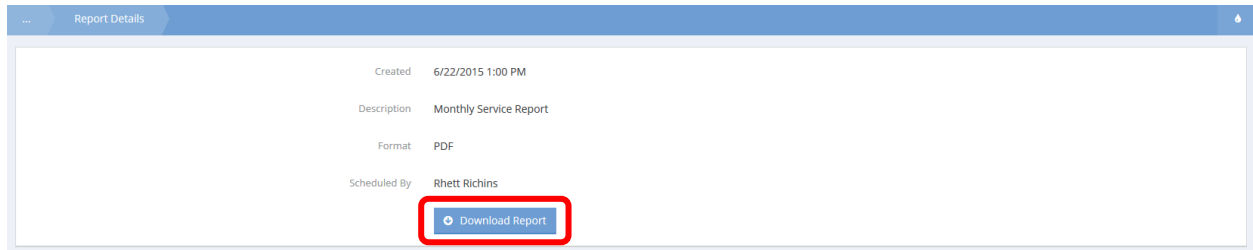
Download Reports			
Download Selected			
<input checked="" type="checkbox"/>	Created	File Name	Scheduled By
<input checked="" type="checkbox"/>	6/22/2015 1:00 PM	Monthly_Service_Report_20150622_0100.pdf	Rhett Richins
<input checked="" type="checkbox"/>	6/22/2015 1:00 PM	awefazsdf_20150622_0100.pdf	Paparao Gummadapu
<input checked="" type="checkbox"/>	6/1/2015 12:01 AM	Test_Email_20150601_1200.pdf	Dale Seay
<input checked="" type="checkbox"/>	5/31/2015 12:02 AM	Test_Email_20150531_1200.pdf	Dale Seay
<input checked="" type="checkbox"/>	5/30/2015 12:02 AM	Test_Email_20150530_1200.pdf	Dale Seay
<input checked="" type="checkbox"/>	5/23/2015 1:01 PM	Services_by_Program_-_Weekly_20150523_0100.pdf	Cameron Beck
<input checked="" type="checkbox"/>	5/17/2015 11:01 PM	United_Way_Monthly_Census_Report_20150517_1100.pdf	meg monti
<input checked="" type="checkbox"/>	5/17/2015 10:00 PM	United_Way_Monthly_Census_Report_20150517_1000.pdf	meg monti
<input checked="" type="checkbox"/>	5/17/2015 9:00 PM	United_Way_Monthly_Census_Report_20150517_0900.pdf	meg monti
<input checked="" type="checkbox"/>	5/17/2015 8:00 PM	United_Way_Monthly_Census_Report_20150517_0800.pdf	meg monti
<input checked="" type="checkbox"/>	5/17/2015 7:01 PM	United_Way_Monthly_Census_Report_20150517_0700.pdf	meg monti
<input checked="" type="checkbox"/>	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.

Download Reports			
Download Selected			
<input checked="" type="checkbox"/>	Created	File Name	Scheduled By
<input checked="" type="checkbox"/>	6/22/2015 1:00 PM	Monthly_Service_Report_20150622_0100.pdf	Rhett Richins
<input checked="" type="checkbox"/>	6/22/2015 1:00 PM	awefazsdf_20150622_0100.pdf	Paparao Gummadapu
<input checked="" type="checkbox"/>	6/1/2015 12:01 AM	Test_Email_20150601_1200.pdf	Dale Seay
<input checked="" type="checkbox"/>	5/31/2015 12:02 AM	Test_Email_20150531_1200.pdf	Dale Seay
<input checked="" type="checkbox"/>	5/30/2015 12:02 AM	Test_Email_20150530_1200.pdf	Dale Seay
<input checked="" type="checkbox"/>	5/23/2015 1:01 PM	Services_by_Program_-_Weekly_20150523_0100.pdf	Cameron Beck
<input checked="" type="checkbox"/>	5/17/2015 11:01 PM	United_Way_Monthly_Census_Report_20150517_1100.pdf	meg monti
<input checked="" type="checkbox"/>	5/17/2015 10:00 PM	United_Way_Monthly_Census_Report_20150517_1000.pdf	meg monti
<input checked="" type="checkbox"/>	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.



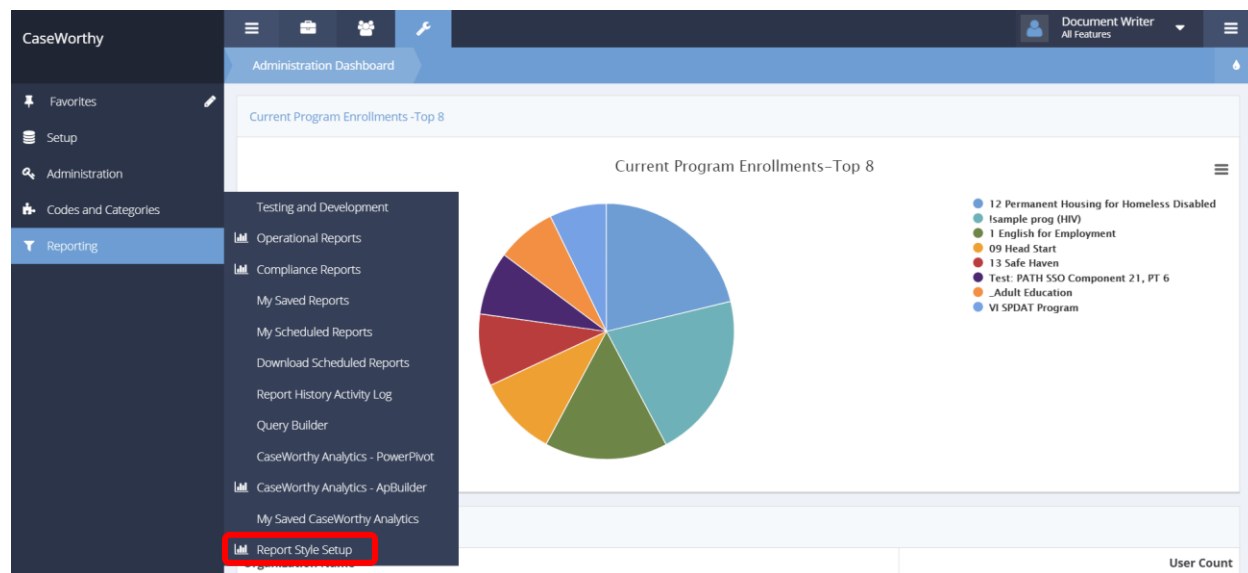
Created	6/22/2015 1:00 PM
Description	Monthly Service Report
Format	PDF
Scheduled By	Rhett Richins
Download Report	

To download the currently selected report, click the [Download Report](#) button. The report downloads via the browser currently being used.

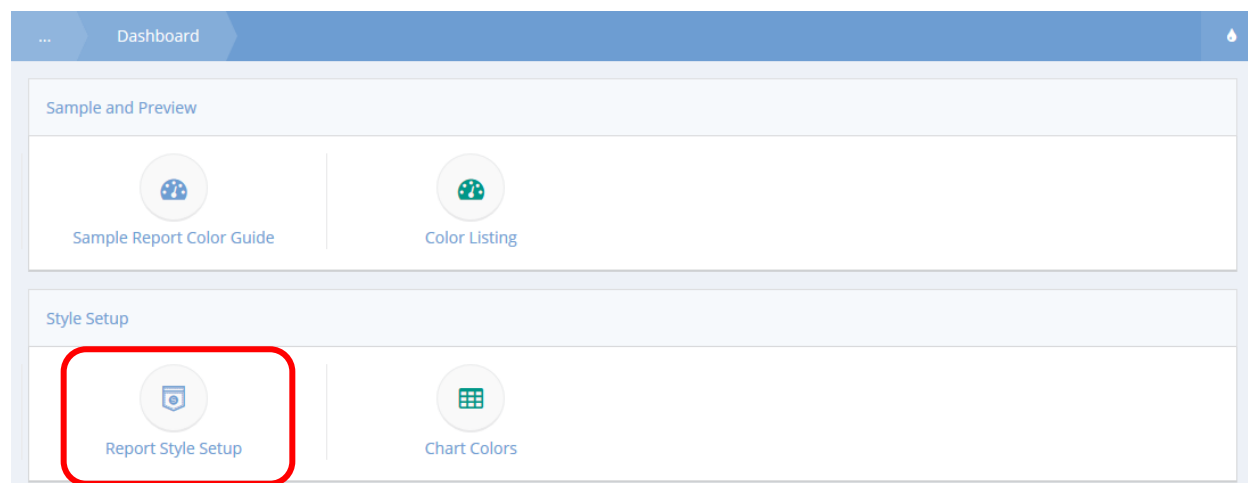
Report Style Setup

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
<input checked="" type="checkbox"/>	AlternateRow	#FFFFFF	None	LightGrey	0.5	10	Arial	#4A4A4A	Normal	Normal	Normal	12
<input checked="" type="checkbox"/>	ChartLegend	White	None	LightGrey	0.5	10	Arial	#4A4A4A	Normal	Bold	Normal	58
<input checked="" type="checkbox"/>	ChartTitle	White	None	LightGrey	0.5	10	Arial	#4A4A4A	Normal	Bold	Normal	61
<input checked="" type="checkbox"/>	ColumnHeader	#F7F7F7	Solid	#BBBBBB	0.5	10	Arial	#8A8A8A	Normal	Bold	Normal	55
<input checked="" type="checkbox"/>	DetailRow	#E8E8E8	None	LightGrey	0.5	10	Arial	#4A4A4A	Normal	Medium	Normal	11
<input checked="" type="checkbox"/>	GroupFooter1	#73ACEE	Solid	White	2.0	10	Arial	White	Normal	Bold	Normal	15
<input checked="" type="checkbox"/>	GroupFooter2	#6EA66A	Solid	White	2.0	10	Arial	White	Normal	Bold	Normal	34
<input checked="" type="checkbox"/>	GroupFooter3	#487245	Solid	White	2.0	10	Arial	White	Normal	Bold	Normal	40

Save
Cancel

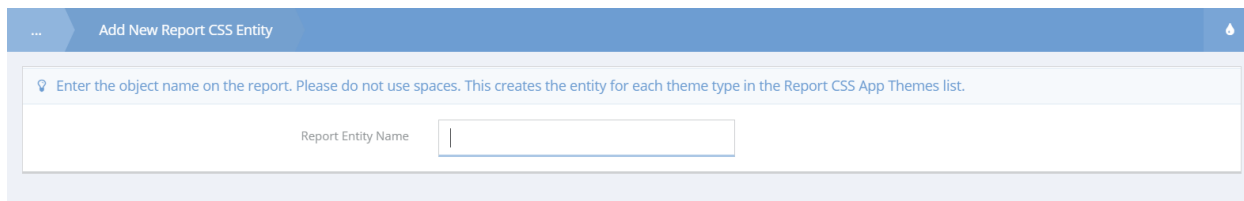
To edit an existing entity, click on the ☒ icon. The row expands to enable editing for each element of the entity.

...
Report Style Setup
+ Add New

<input checked="" type="checkbox"/>	GroupHeader2	#6EA66A	Solid	White	2.0	10	Arial	White	Normal	Bold	Normal	31
<input checked="" type="checkbox"/>	GroupHeader3	#487245	Solid	White	2.0	10	Arial	White	Normal	Bold	Normal	37
<input checked="" type="checkbox"/>	GroupHeader4	#054375	Solid	White	2.0	10	Arial	White	Normal	Bold	Normal	43
<input checked="" type="checkbox"/>	GroupHeader5	#686868	Solid	White	2.0	10	Arial	White	Normal	Bold	Normal	49
<input checked="" type="checkbox"/>	ReportBody	White	Solid	LightGrey	0.5	10	Arial	Black	Normal	Normal	Normal	13
<input checked="" type="checkbox"/>	ReportHeader	#E8E8E8	Solid	LightGrey	0.5	22	Arial	#D15759	Normal	Bold	Normal	1
<input checked="" type="checkbox"/>	ReportParams	#4A4A4A	Solid	LightGrey	0.5	10	Arial	#F3F3F3	Normal	Normal	Normal	8
<input checked="" type="checkbox"/>	ReportParamsVariable	#4A4A4A	Solid	LightGrey	0.5	10	Arial	White	Normal	Bold	Normal	65
<input checked="" type="checkbox"/>	RunByStatic	White	Solid	LightGrey	0.5	10	Arial	#686868	Normal	Normal	Normal	25
<input checked="" type="checkbox"/>	RunByVariable	White	Solid	LightGrey	0.5	10	Arial	#4A4A4A	Normal	Bold	Normal	64
<input checked="" type="checkbox"/>	testentity	White	Solid	LightGr	.5	9	Trebucl	Black	Norm	Norm	Norm	66

Save
Cancel

To add a new style control entity, click the **+ Add New** button. The Add New Report CSS Entity form appears.

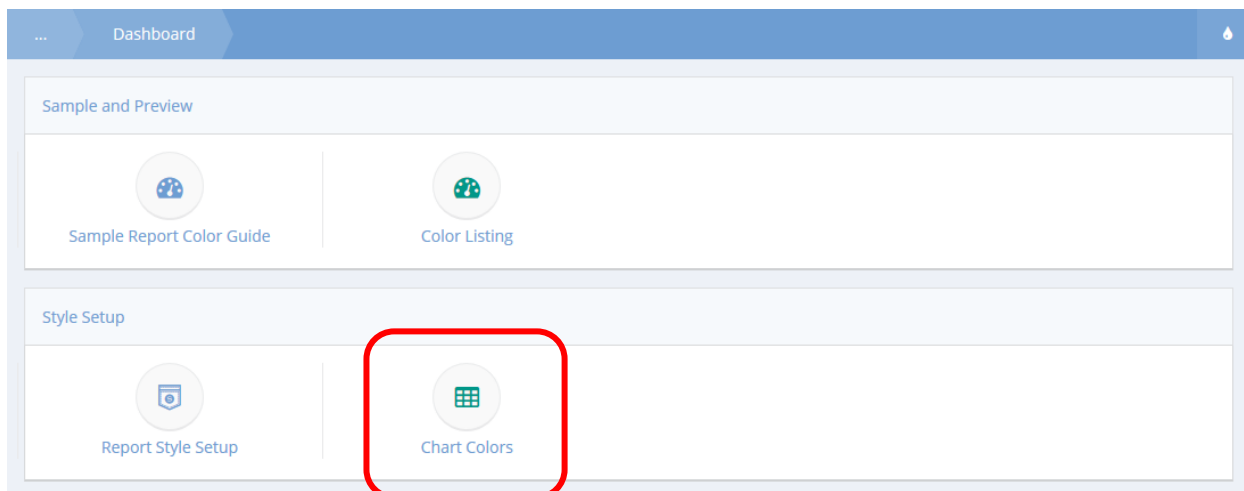


Enter a name for the entity and click the **Save** button. The new entity now appears on the Report Style Setup form. Click the ☒ icon to expand its row and enable editing. Click the **Save** button to exit the form.

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.

...

Report Chart Colors

+ Add Row

▼ Filters

When adding a new color, please keep the total number of color options consistent for all themes.

Theme Name * default theme ▼

Search

	Color *	Color Order *	Report Chart CSS ID
<input checked="" type="checkbox"/>	#3885C1	1	1
<input checked="" type="checkbox"/>	#B8E986	2	2
<input checked="" type="checkbox"/>	#73ACEE	3	3
<input checked="" type="checkbox"/>	#6EA66A	4	4
<input checked="" type="checkbox"/>	#D15759	5	5
<input checked="" type="checkbox"/>	#ECF81C	6	6
<input checked="" type="checkbox"/>	#AD7BB8	7	7

Save

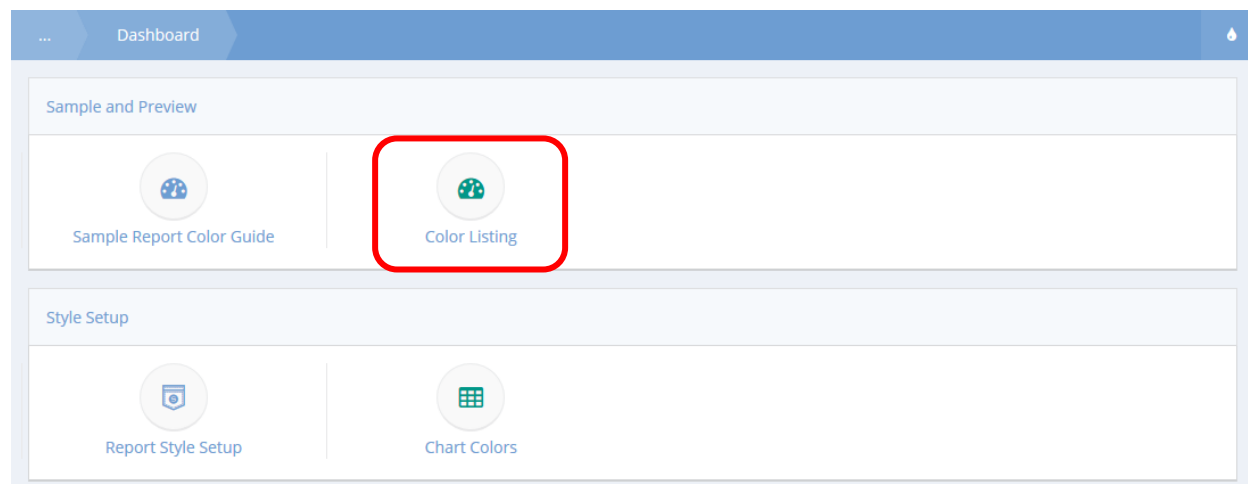
Cancel

Select a theme by using the drop-down arrow. To edit a color, click the ☒ icon. The field expands to enable editing. Click the button to save changes and exit the form.

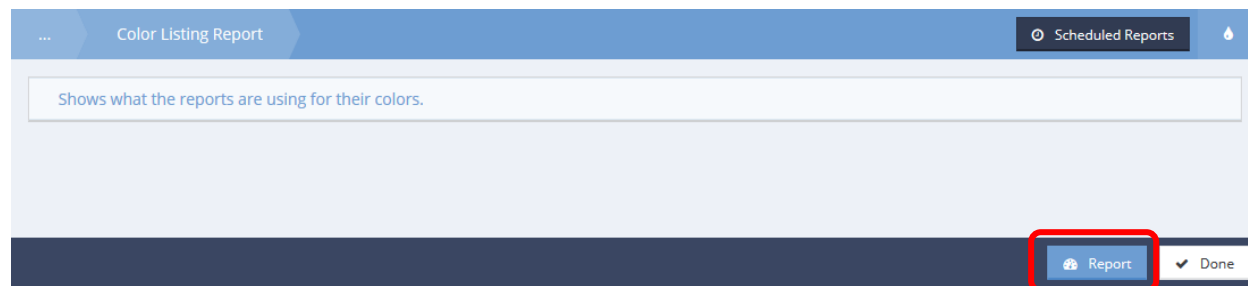
Report Color Listing


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



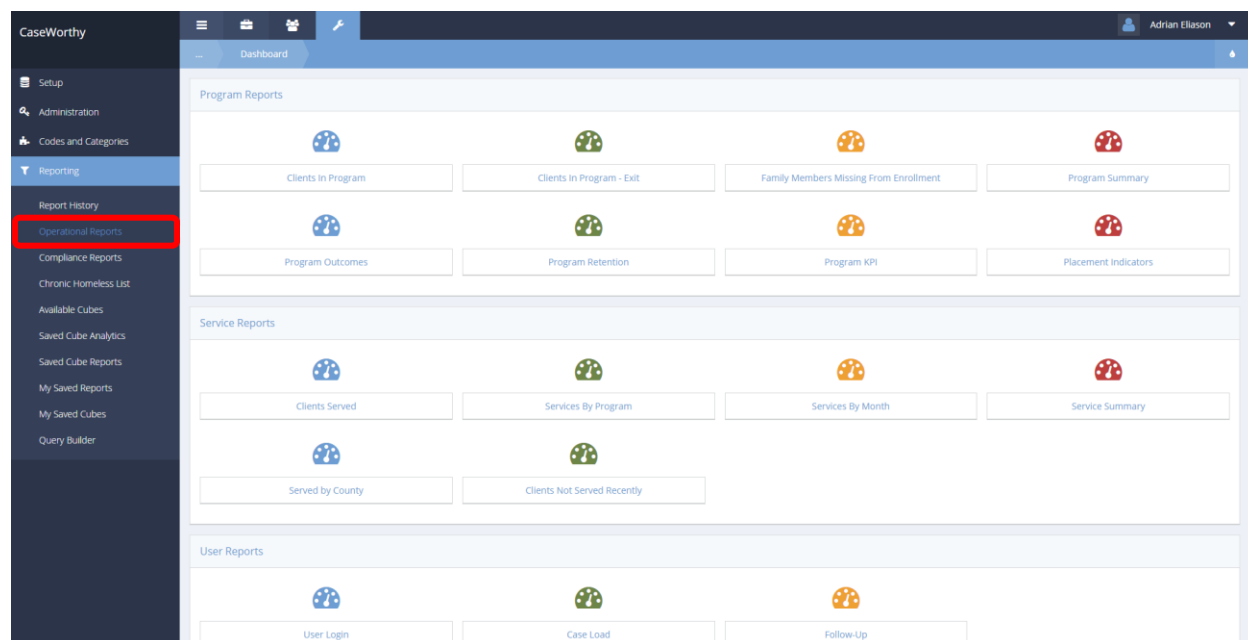
From the Report Style Setup dashboard, click on the Color Listing icon.



Click the  Report 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.

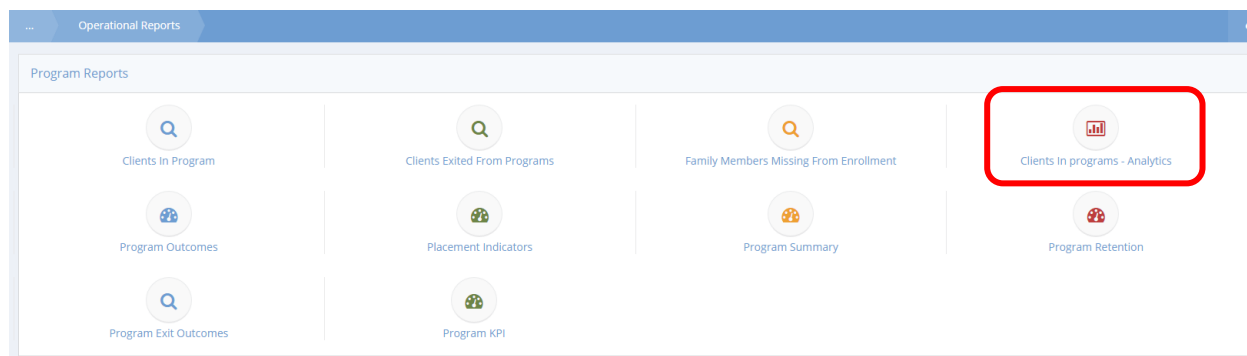
Check Register – If CaseWorthy™ is used to cut checks to vendors for utility assistance or other services, this report provides an accounting of payments made.

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)



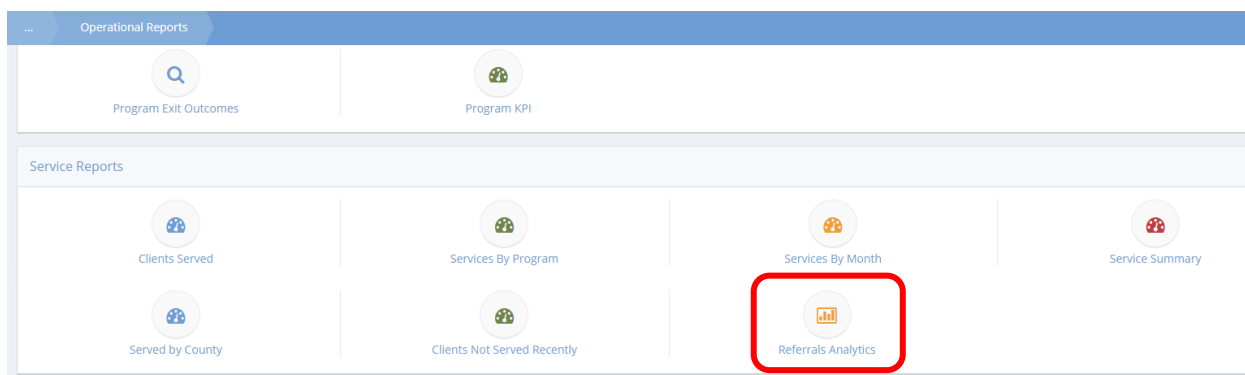
Click the icon for Clients In programs – Analytics. The Client in Program pivot table displays.

1	2	3	4	5	6	7	8
	* Enrollment End Date-Year *			Total Average of Days Enrolled			
	2012	2013	2014				
2	* Program Name						
3	+ 12 Permanent Housing for Homeless Disabled	82	229	276	228		
4	+ 13 Safe Haven	438	0	162	187		
5	+ Adult Education	206	68	58	148		
6	+ Food Pantry El Centro	135			135		
7	+ St. Patricks Center	9	1,353		278		
8	Grand Total	166	248	186	188		

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.

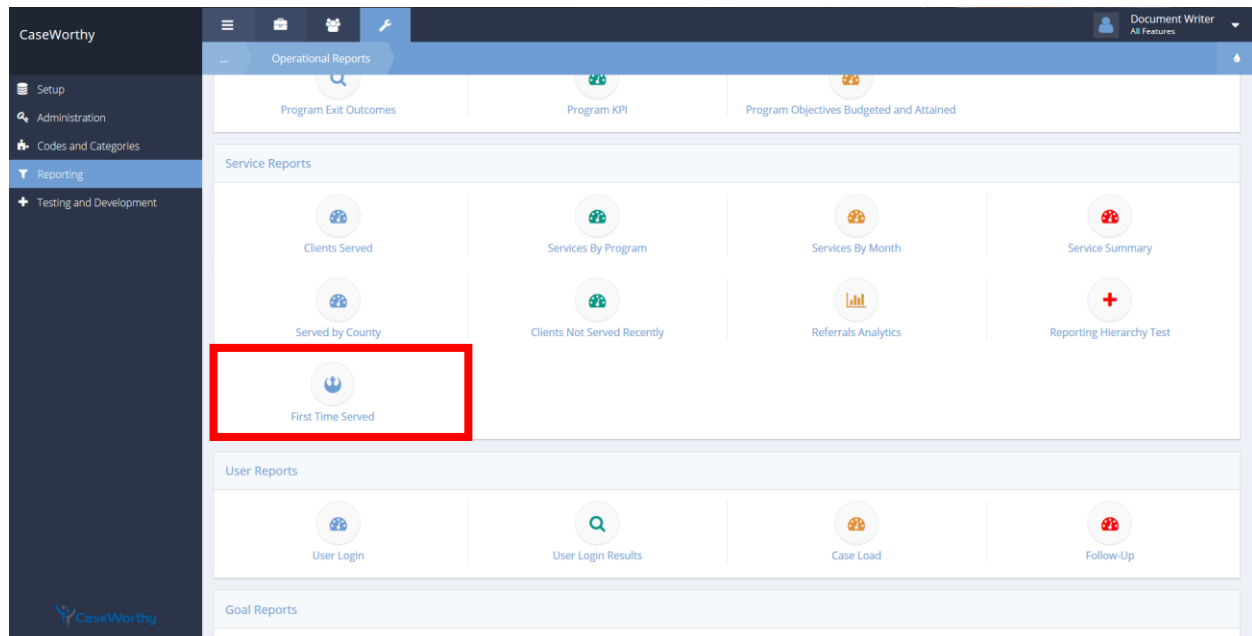
1	2	3	4	5	6	7	8
	* Referral Date-Year *			Total Count of Provider From *			
	2012	2013	2014				
2	* Provider To *						
3	+ CaseWorthy	73.00	206.00	162.00	441.00		
4	+ Treatment Center of Salt Lake	2.00	2.00	20.00	24.00		
5	+ Provider B			18.00	18.00		
6	+ Banner Health		13.00	3.00	16.00		
7	+ Catholic Charitable Bureau Archdiocese of Boston		4.00	9.00	13.00		
8	+ Head Start	5.00		2.00	7.00		
9	+ Kings Emergency Shelter	6.00		1.00	7.00		
10	+ Kings Safe House	2.00		3.00	5.00		
11	+ CaseWorthy (Real)			3.00	3.00		
12	+ DV Shelter	3.00			3.00		
13	Grand Total	91.00	225.00	221.00	537.00		

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.

... First Time Served Report Scheduled Reports

Save Report Parameters Edit Save

Enter the date range of services.

Begin Date * 📅 End Date * 📅

Select all or some Organizations, Programs, Accounts, Service Types, and Case Managers.

Organization(s) * ☐ All ☒ Some Program(s) * ☐ All ☒ Some Account(s) * ☐ All ☒ Some

Service Type(s) * ☐ All ☒ Some Provider * ☐ All ☒ Some Case Manager(s) * ☐ All ☒ Some

Report Service Category(s) * ☐ All ☒ Some

Select all or some client demographic information. The report will only return records matching the selected criterion. Note: Region represents the Geographic Region of the Client's Address at time of Service

Age Groups * ☐ All ☒ Some Race * ☐ All ☒ Some Ethnicity * ☐ All ☒ Some

Gender * ☐ All ☒ Some Region(s) * ☐ All ☒ Some

Select the group category.

Group By *

Report Done

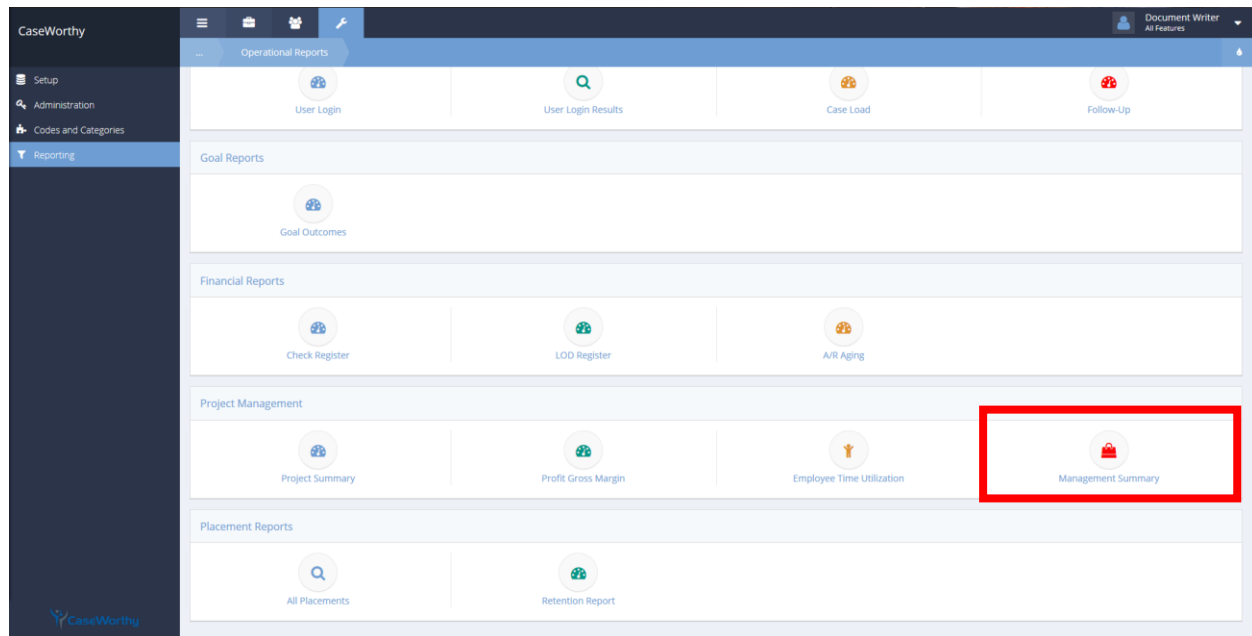
Select a begin and end date for which the report should run. Select desired report parameters, either All or Some, and finally, select a category to group data by. Click the Report button to launch the report. The report displays in a new pop-up window. Click the Done button when finished.

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.

Management Summary Report

Scheduled Reports

Save Report Parameters

Enter the date range for the reporting period.

StartDate * End Date *

Organization(s) * Program(s) *

Service(s) * Location(s) *

Report Service Category(s) * Region(s) *

Report Done

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.

... Clients Served Report Scheduled Reports

Save Report Parameters

Enter the date range of services.

Begin Date End Date

Select all or some Organizations, Programs, Accounts, Service Types, and Case Managers.

Organization(s) ☒ All ☐ None ☐ Some

Service Type(s) ☒ All ☐ None ☐ Some

Report Service Categories(s) ☒ All ☐ None ☐ Some

Program(s) ☒ All ☐ None ☐ Some

Provider Location(s): ☒ All ☐ None ☐ Some

Unit Type(s) ☒ All ☐ None ☐ Some

Account(s) ☒ All ☐ None ☐ Some

Case Manager(s) ☒ All ☐ None ☐ Some

Select all or some client demographic information. The report will only return records matching the selected criterion. Note: Region represents the Geographic Region of the Client's Address at time of Service

Age Groups ☒ All ☐ None ☐ Some

Gender ☒ All ☐ None ☐ Some

Race ☒ All ☐ None ☐ Some

Region(s) ☒ All ☐ None ☐ Some

Ethnicity ☒ All ☐ None ☐ Some

Select the primary sort (Group By) order.

Group By Group By Like Units? ☐

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.

The screenshot shows the 'Service Summary Report' form. At the top, there is a header bar with 'Service Summary Report' on the left and 'Scheduled Reports' on the right. Below the header, there is a section for 'Save Report Parameters' with a dropdown menu and 'Edit' and 'Save' buttons. The main form area is titled 'Enter the begin and end date of the reporting period.' and contains several input fields and radio buttons. The fields are: 'Begin Date' and 'End Date' (both with calendar icons), 'Organization(s)' (radio buttons for All, None, Some), 'Location(s)' (radio buttons for All, None, Some), 'Region(s)' (radio buttons for All, None, Some), 'Unit Type(s)' (radio buttons for All, None, Some), 'Service(s)' (radio buttons for All, None, Some), 'Report Service Category(s)' (radio buttons for All, None, Some), and 'Group By Like Units?' (checkbox). At the bottom right, there are 'Report' and 'Done' buttons.

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  Report 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.

Monthly Summary Report

Scheduled Reports

Save Report Parameters

Enter the End Date for the reporting period.

StartDate ★

End Date ★

Organization(s) ★ ☒ All ☐ None ☐ Some

Program(s) ★ ☒ All ☐ None ☐ Some

Service(s) ★ ☒ All ☐ None ☐ Some

Location(s) ★ ☒ All ☐ None ☐ Some

Report Service Category(s) ★ ☒ All ☐ None ☐ Some

Region(s) ★ ☒ All ☐ None ☐ Some

Unit Type(s) ★ ☒ All ☐ None ☐ Some

Group By Like Units? ☐

Report Done

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 Report 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)

Program Service Summary Report

Scheduled Reports

Save Report Parameters

Edit Save

Enter the begin and end date of the quarter or year.

Begin Date *

End Date *

Organization(s) *

Program(s) *

Service(s) *

Location(s) *


Report Service Category(s) *

Region(s) *

Unit Type(s) *

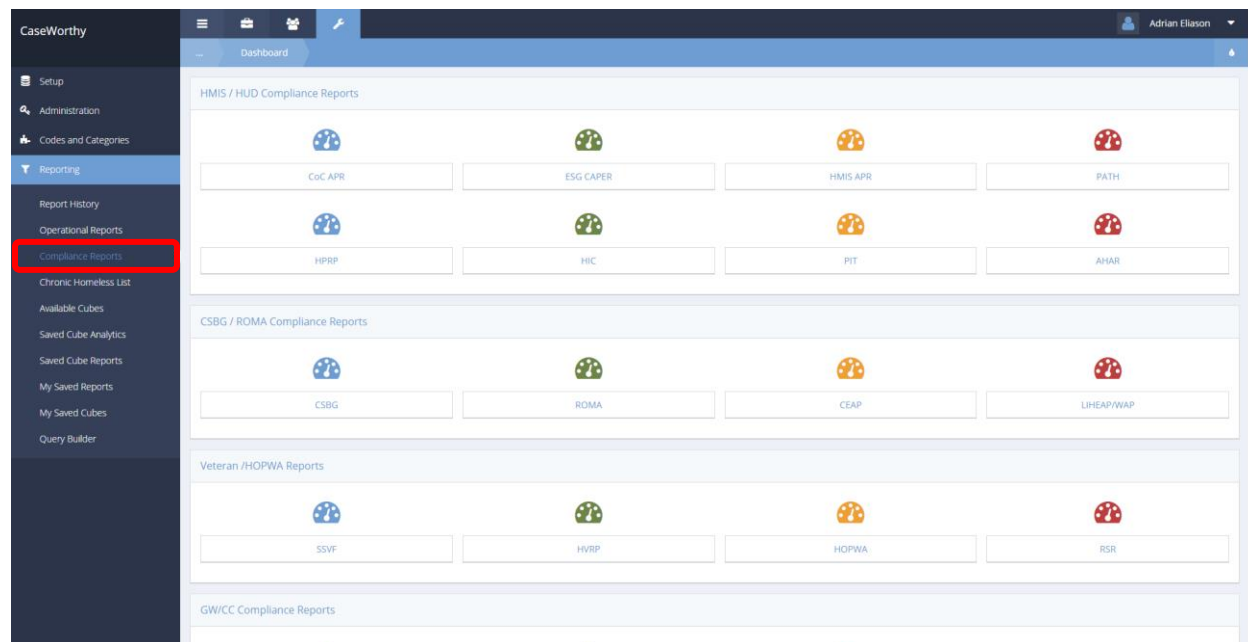
Group By Like Units?

Report Done

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  Report 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.

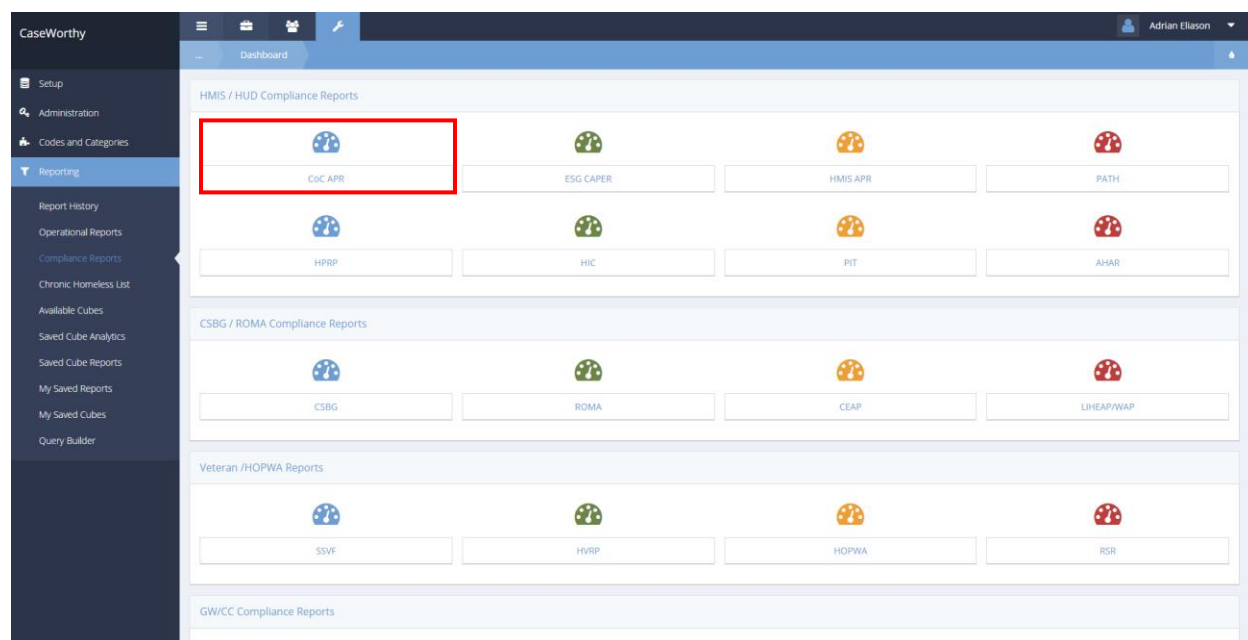
Veteran /HOPWA – It includes the SSVF, HVRP, HOPWA, and RSR reports.

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  **Report** when finished.

HUD Continuum of Care Annual Progress Report

Save Report Parameters

Select report criteria.

Start Date *

End Date *

Organization(s) * ☒ All ☐ Some

Project(s) * ☒ All ☐ Some


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



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.

The screenshot shows the 'HUD CoC APR 1.0 - Fall 2015' report configuration interface. At the top, there is a breadcrumb trail and a 'Scheduled Reports' button. Below this is a 'Save Report Parameters' section with an 'Edit' button and a 'Save' button. The main area is titled 'Select report criteria.' and contains several input fields: 'Start Date' with a calendar icon, 'End Date' with a calendar icon, 'Organization(s)' with radio buttons for 'All', 'None', and 'Some', and 'Project(s)' with radio buttons for 'All', 'None', and 'Some'. A search box with a magnifying glass and a close button is also present. At the bottom right, there is a 'Report' button and a 'Done' button.

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.

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.

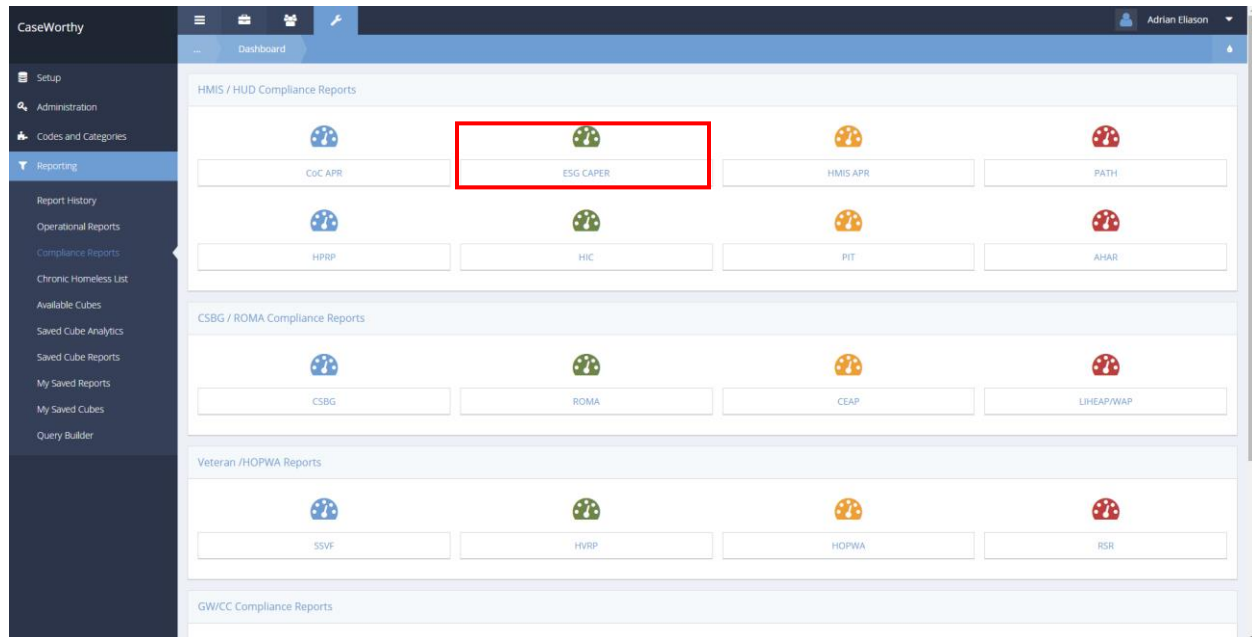
The screenshot shows the 'HUD CoC APR 5.0 - Fall 2016' report form. At the top, there is a header bar with the title and a 'Scheduled Reports' button. Below the header, there is a 'Save Report Parameters' section with a dropdown menu and 'Edit' and 'Save' buttons. The main section is titled 'Select report criteria.' and contains several input fields: 'Start Date' and 'End Date' (both with calendar icons), 'Organization(s)' (with radio buttons for 'All', 'None', and 'Some'), and 'Project(s)' (with radio buttons for 'All', 'None', and 'Some' and a search box). At the bottom, there is a dark blue bar with three buttons: 'APR CSV Export', 'Report', and 'Done'.


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.

The screenshot shows a confirmation dialog box with the text: "Your CoC APR CSV 5.0 Export file has been queued and will be available to download on your Administration area in about 10 to 20 minutes." There is an 'OK' button at the bottom right.

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.

... ESG CAPER

Save Report Parameters

Select report criteria.

Report Begin Date * 12/22/2014

Report End Date * 12/22/2014

Organization(s) * ☒ All ☐ Some

Project(s) * ☒ All ☐ Some

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
	Homeless Prevention	Rapid Re-Housing	Shelter	Outreach	Total
Gender					
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
	Homeless Prevention	Rapid Re-Housing	Shelter	Outreach	Total
Age					
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.

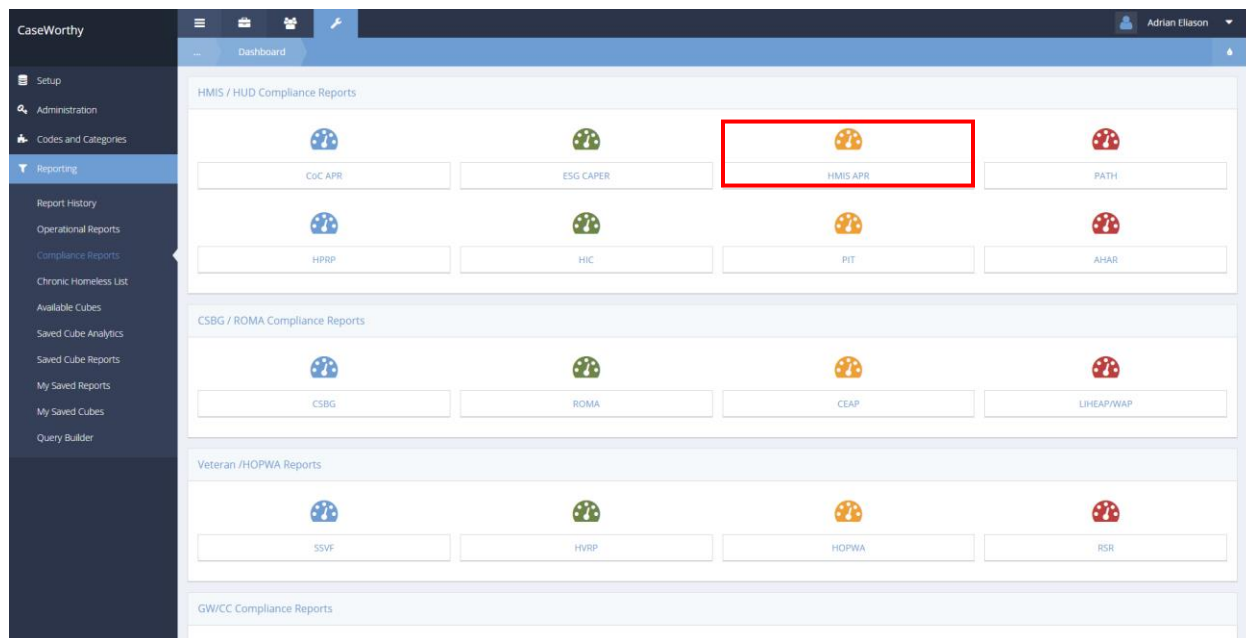
The screenshot shows the 'ESG CAPER v5.0 - Fall 2016' report form. At the top, there's a blue header bar with the title and a 'Scheduled Reports' button. Below the header, there's a 'Save Report Parameters' section with a dropdown menu and 'Edit' and 'Save' buttons. The main form area is titled 'Select report criteria.' and contains several input fields: 'Report Begin Date' (03/08/2017), 'Report End Date' (03/08/2017), 'Organization(s)' (All, None, Some), and 'Project(s)' (None, Some). There are also search and close buttons for the Project(s) dropdown. At the bottom of the form, there are three buttons: 'CAPER CSV Export', 'Report', and 'Done'.


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.

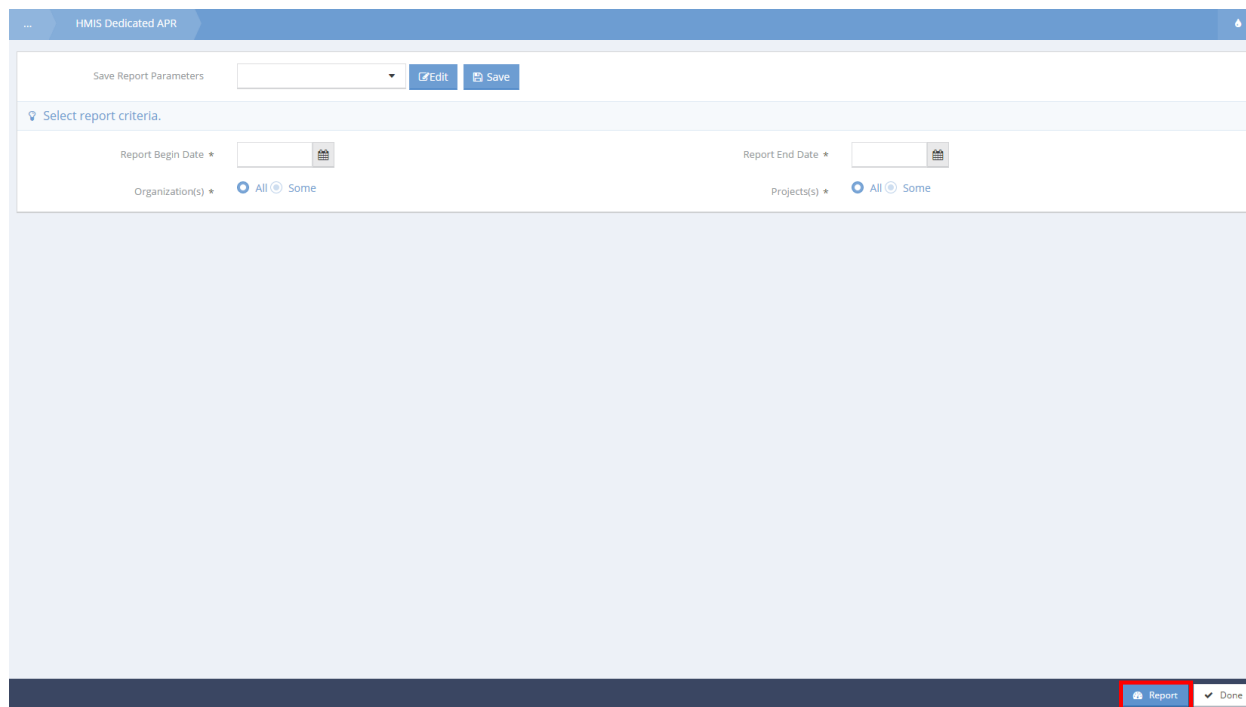
The screenshot shows a confirmation dialog box with the text: 'Your ESG CAPER CSV 5.0 Export file has been queued and will be available to download on your Administration area in about 10 to 20 minutes.' There is an 'OK' button at the bottom right of the dialog.

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  **Report** 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



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

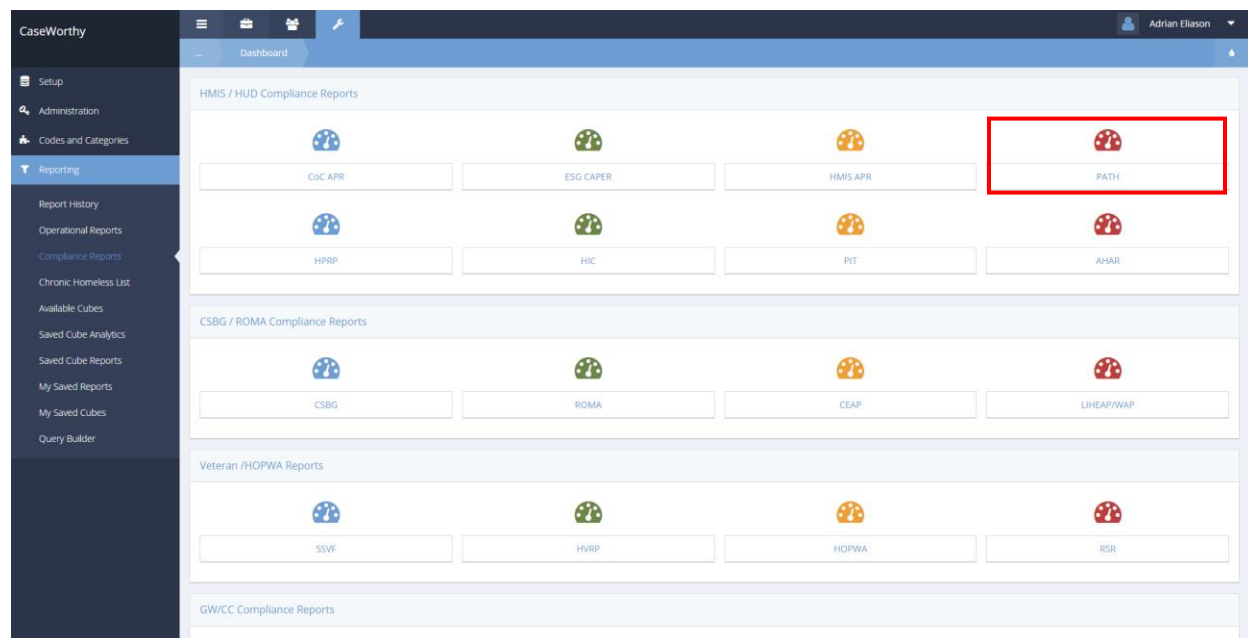
Type of CoC Programs	Number of CoC Programs	Participating in HMIS
Emergency Shelter	5	3
Transitional Housing	2	1
Permanent Supportive Housing	1	0
Homeless Street Outreach	5	2
HRP	0	0
Services Only	3	1
Other	1	0
Safe haven	1	1
Permanent Housing	0	0
Total	26	12


H 11c - Program Descriptor Data Elements

Data Element	Count	Missing	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.


PATH Report

Save Report Parameters

Select report criteria.

Begin Date *  End Date * 

Organization(s) * ☒ All ☐ Some Projects(s) * ☒ All ☐ Some

 **Report**

The report displays in a new window.

PATH		
Run By aellason - CaseWorthy on 12/22/2014 9:41:57 AM		
Report Period.....	12/9/2014 - 12/22/2014	
Program.....	All Programs	
Organization(s).....	All Orgs	

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

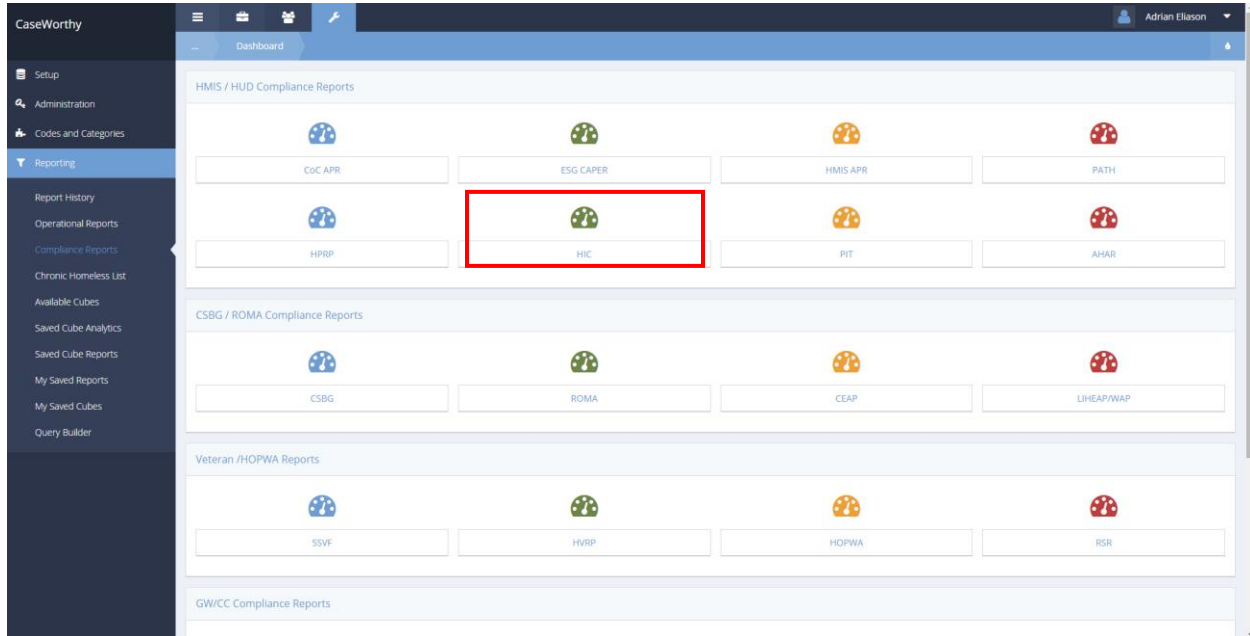
C		
Sub Item	Type of Service	Answer
C	Unduplicated count of individuals receiving services by Service Report Mapping type	0
C.a	Outreach	0
C.b	Screening and diagnostic treatment	0
C.c	Habilitation and rehabilitation	0
C.d	Community mental health	0
C.e	Alcohol or drug treatment	0
C.f	Staff training	0
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

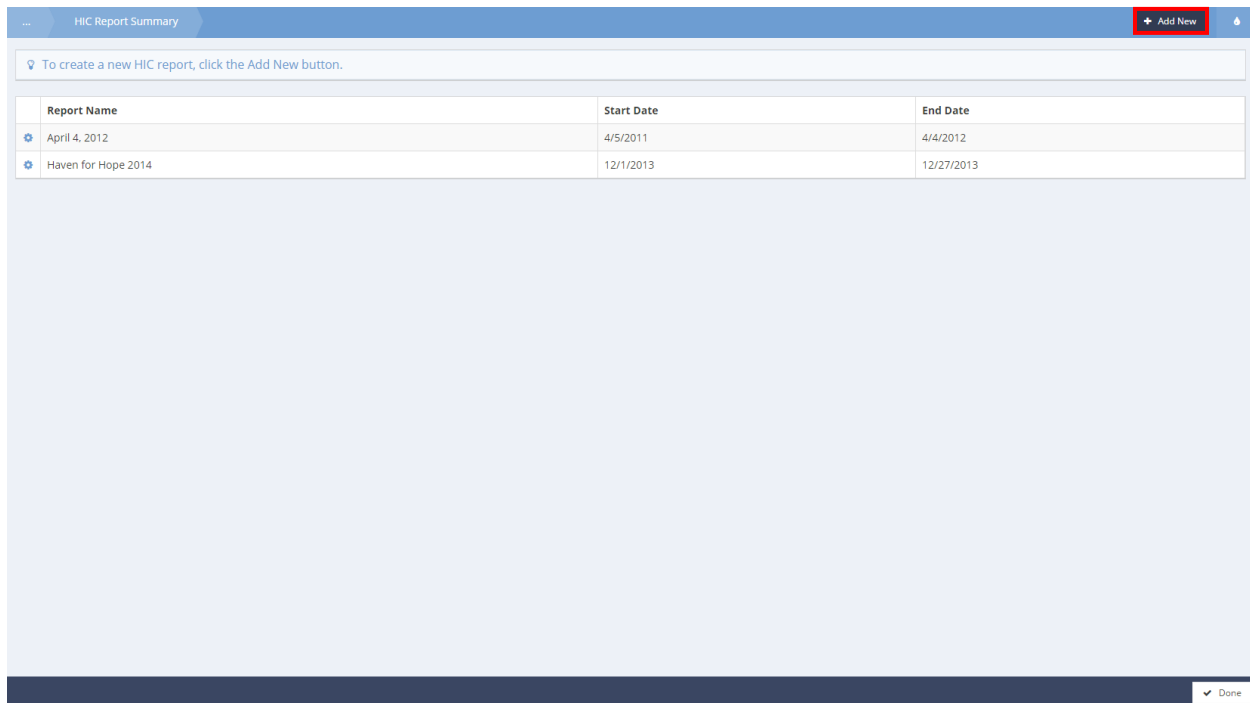
Page 1 of 4

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.

... HIC Report Launch

Select the begin and end dates for the reporting period.

Report Name

Report Begin Date *

Report End Date *

Organizations * All None

Project(s) * All None

Choose Options...

Choose Options...

Save Cancel

To view an HIC report, click the action gear next to a report and click Report.

... HIC Report Summary + Add New

To create a new HIC report, click the Add New button.

		Start Date	End Date
Edit		12/3/2014	12/22/2014
Report		4/5/2011	4/4/2012
Delete		12/1/2013	12/27/2013
Haven for Hope 2014			

Done

The report displays in a new window.


HIC

Run By aelason - 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

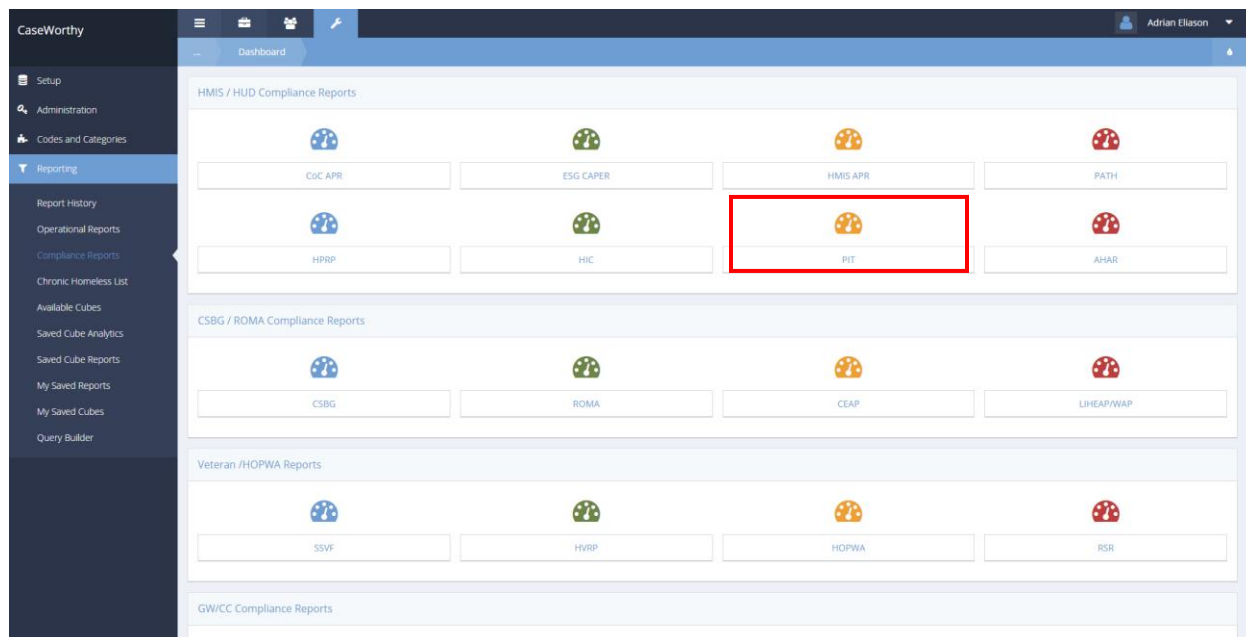
Capacity for Households with Children			Capacity for Households without Children			Capacity for Children-only Households			Chronic Beds
Beds	Units	HMIS Beds	Beds	Units	HMIS Beds	Beds	Units	HMIS Beds	Beds
85	2	0	3	1	0	16	0	0	2

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.



The screenshot shows the CaseWorthy dashboard with a sidebar on the left containing navigation links: Setup, Administration, Codes and Categories, Reporting, 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 main content area displays a grid of report icons under the heading 'HMIS / HUD Compliance Reports'. The icons are arranged in two rows. The first row contains CoC APR, ESG CAPER, HMIS APR, and PATH. The second row contains HRP, HIC, PIT (highlighted with a red rectangle), and AHAR. Below this, there are sections for 'CSBG / ROMA Compliance Reports' (CSBG, ROMA, CEAP, LIHEAP/WAP), 'Veteran / HOPWA Reports' (SSVF, HVRP, HOPWA, RSR), and 'GW/CC Compliance Reports'.

To create a new PIT report, click the **+ Add New** button.

... PIT Report Summary + Add New

🔍 To create a new PIT Report, click the Add New button.

Report Name	Date of PIT
⚙️ October 26 2011	10/26/2011
⚙️ January 26 2012	1/26/2012
⚙️ Feb 29 2012	2/29/2012
⚙️ Emergency Shelter PIT	2/29/2012
⚙️ Haven For Hope 2014	12/25/2013
⚙️ February 6, 2014	2/6/2014

Done

Enter a report name and date. Choose any organizations and providers. Click Save when done. The report now appears in the PIT Report Summary.

... Point In Time

🔍 Type a name and select the parameters of the Point in Time count.

Report Name *

Date of PIT *

Organization(s) *

All None

Choose Options...

Project(s) *

All None

Choose Options...

To view a report, click the action gear next to a report and click Report.

... PIT Report Summary + Add New

To create a new PIT Report, click the Add New button.

	Date of PIT
<div> <div>✎ Edit</div> <div>🖨 Report</div> <div>🗑 Delete</div> </div>	10/26/2011
Feb 29 2012	2/29/2012
Emergency Shelter PIT	2/29/2012
Haven For Hope 2014	12/25/2013
February 6, 2014	2/6/2014


Done

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



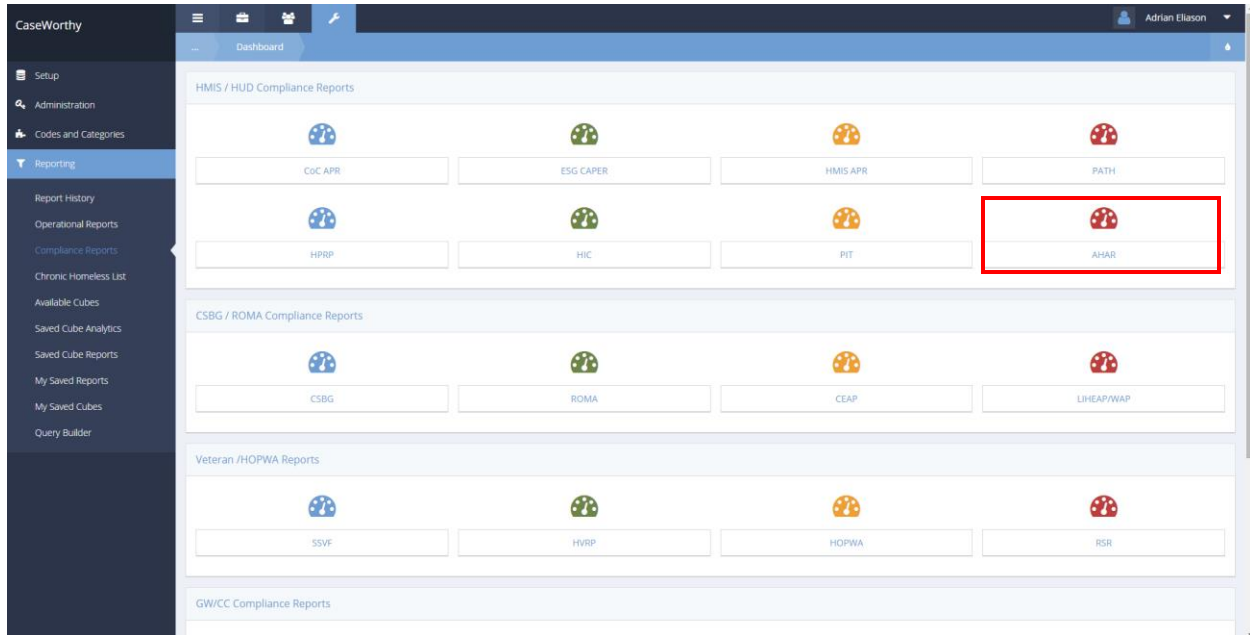
Use the following hyperlinks to access the Excel-ready Sub Report

	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	

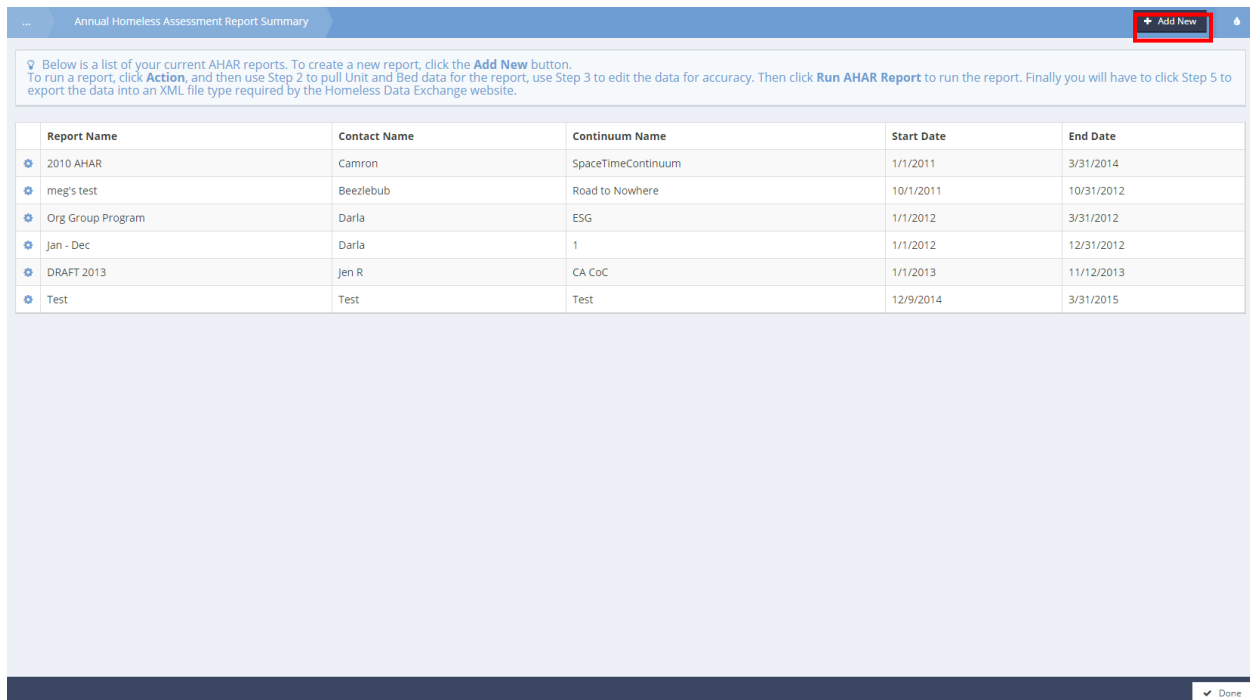
PIT Report Page 1 of 4

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.

Below is a list of your current AHAR reports. To create a new report, click the **Add New** button. To run a report, click the **Action** gear, and then use Step 2 to pull Unit and Bed data for the report, use Step 3 to edit the data for accuracy. Then report. Finally you will have to click Step 5 to export the data into an XML file type required by the Homeless Data Exchange website.

Contact Name	Continuum Name	Start Date
mron	SpaceTimeContinuum	1/1/2011
R	CA CoC	1/1/2013
	All	1/1/2013
	J CoC	12/1/2013
Test	Test	12/9/2014
AHAR 2015	Test	1/1/2015
Issue 1680 Test	Issue 1680 Test	9/1/2015

The Annual Homeless Assessment Reporting form displays.

Annual Homeless Assessment Reporting

Report Title: DRAFT 2013

Report Year: 2013

Begin Date: 01/01/2013

End Date: 11/12/2013

Organization: Choose Options...


Project: All, None, Choose Options...

Jurisdictions: Choose Options...

Current Project Selection

ProgramName
12 Permanent Housing for Homeless Disabled
13 Safe Haven
15 Supportive Services Only
16 HMIS (ES)
21 Tenant-based Rental Assistance (TRA)
22 Sponsored Rental Asst (SRA) NA
23 Proj-based Rent Asst (PRA-TH)
24 Single Room Occupancy (SRO)
25 Ryan White
EmergencyShelter(PIT)
HOPWA

Save Cancel

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  button to save and exit.

The report now appears in the AHAR Summary.

Annual Homeless Assessment Reporting

Report Title

Report Year *

Begin Date * 12/22/2014

End Date *

Organization * All None
Choose Options...

Projects * All None
Choose Options...

Jurisdictions Choose Options...

Continuum Name *

Contact Name *

Veteran's AHAR: "Run as Veterans AHAR" excludes questions regarding children and other non-applicable data, in accordance with ABT specifications

Run as Veterans AHAR ☐

Save Cancel

Click the action gear and click Step 2.

Annual Homeless Assessment Report Summary + Add New

Below is a list of your current AHAR reports. To create a new report, click the **Add New** button. To run a report, click **Action**, and then use Step 2 to pull Unit and Bed data for the report, use Step 3 to edit the data for accuracy. Then click **Run AHAR Report** to run the report. Finally you will have to click Step 5 to export the data into an XML file type required by the Homeless Data Exchange website.

	Report Name	Contact Name	Continuum Name	Start Date	End Date
	2010 AHAR	Camron	SpaceTimeContinuum	1/1/2011	3/31/2014
	meg's test	Beezlebub	Road to Nowhere	10/1/2011	10/31/2012
		Darla	ESG	1/1/2012	3/31/2012
		Darla	1	1/1/2012	12/31/2012
		Jen R	CA CoC	1/1/2013	11/12/2013
		contact	continuum	12/2/2014	12/22/2014
		Test	Test	12/9/2014	3/31/2015

Step 1. Set up AHAR Options
Step 2. Pull Unit/Bed Counts from
 Step 3. Check/Correct Unit and Bed Capacities
 Step 4. Run AHAR Report
 Step 5. Generate AHAR XML File
 Delete Report

Done

Click the action gear again and click Step 3.

Annual Homeless Assessment Report Summary + Add New

Below is a list of your current AHAR reports. To create a new report, click the **Add New** button. To run a report, click **Action**, and then use Step 2 to pull Unit and Bed data for the report, use Step 3 to edit the data for accuracy. Then click **Run AHAR Report** to run the report. Finally you will have to click Step 5 to export the data into an XML file type required by the Homeless Data Exchange website.

Report Name	Contact Name	Continuum Name	Start Date	End Date
2010 AHAR	Camron	SpaceTimeContinuum	1/1/2011	3/31/2014
meg's test	Beezlebub	Road to Nowhere	10/1/2011	10/31/2012
	Darla	ESG	1/1/2012	3/31/2012
	Darla	1	1/1/2012	12/31/2012
	Jen R	CA CoC	1/1/2013	11/12/2013
	contact	continuum	12/2/2014	12/22/2014
	Test	Test	12/9/2014	3/31/2015

Step 1. Set up AHAR Options
 Step 2. Pull Unit/Bed Counts from ECM
Step 3. Check/Correct Unit and Bed Capacities
 Step 4. Run AHAR Report
 Step 5. Generate AHAR XML File
 Delete Report

Done

Check that all unit and bed capacities are correct and click on the **Save** button.

AHAR Verify Beds/Units Report

Start Date: 12/02/2014 End Date: 12/22/2014

Organization: All None Choose Options...
 CaseWorthy
 Catholic Charities
 CCUSA External Providers
 CCUSA Test

Continuum Name: continuum Contact Name: contact

Run as Veterans AHAR? ☐ Report Year: 2014

Emergency Shelter, Transitional Housing, and Permanent Supportive Housing Bed Capacity for families or non-families at non-HMIS participating providers

Emergency Shelter bed capacity for families at non-participating providers (ESF Beds_nH)	0	Transitional Housing bed capacity for individuals at non-participating providers (THI Beds_nH)	0
Emergency Shelter bed capacity for individuals at non-participating providers (ESI Beds_nH)	0	Permanent Supportive Housing bed capacity for families at non-participating providers (PSHF Beds_nH)	0
Transitional Housing bed capacity for families at non-participating providers (THF Beds_nH)	0	Permanent Supportive Housing bed capacity for individuals at non-participating providers (PSHI Beds_nH)	0

Emergency Shelter, Transitional Housing, and Permanent Supportive Housing Bed Capacity for families or non-families at HMIS participating providers

Emergency Shelter bed capacity for families at HMIS participating providers (ESF Beds_H)	0	Transitional Housing bed capacity for individuals at HMIS participating providers (THI Beds_H)	0
--	---	--	---

Save Cancel

Click the action gear and click Run AHAR Report.

Annual Homeless Assessment Report Summary + Add New

Below is a list of your current AHAR reports. To create a new report, click the **Add New** button. To run a report, click **Action**, and then use Step 2 to pull Unit and Bed data for the report, use Step 3 to edit the data for accuracy. Then click **Run AHAR Report** to run the report. Finally you will have to click Step 5 to export the data into an XML file type required by the Homeless Data Exchange website.

Report Name	Contact Name	Continuum Name	Start Date	End Date
2010 AHAR	Camron	SpaceTimeContinuum	1/1/2011	3/31/2014
meg's test	Beezlebub	Road to Nowhere	10/1/2011	10/31/2012
	Darla	ESG	1/1/2012	3/31/2012
	Darla	1	1/1/2012	12/31/2012
	Jen R	CA CoC	1/1/2013	11/12/2013
	contact	continuum	12/2/2014	12/22/2014
	Test	Test	12/9/2014	3/31/2015

Step 1. Set up AHAR Options
 Step 2. Pull Unit/Bed Counts from ECM
 Step 3. Check/Correct Unit and Bed Capacities
 Step 4. Run AHAR Report
 Step 5. Generate AHAR XML File
 Delete Report


Done

The report displays in a new window.

AHAR


Run By JenR - CaseWorthy on 12/22/2014 10:07:09 AM

Report Period..... 1/1/2013 - 11/12/2013
 Organization(s)..... Select All
 Program(s)..... 12 Permanent Housing for Homel



ES-FAM	ES-IND	PSH-FAM	PSH-IND	TH-FAM	TH-IND	Summary
22	35	9	54	7	18	

AHAR Page 1 of 1

Click the action gear  and click Step 5 to export the data in an XML file required by the Homeless Data Exchange website.

Annual Homeless Assessment Report Summary + Add New

Below is a list of your current AHAR reports. To create a new report, click the **Add New** button. To run a report, click **Action**, and then use Step 2 to pull Unit and Bed data for the report, use Step 3 to edit the data for accuracy. Then click **Run AHAR Report** to run the report. Finally you will have to click Step 5 to export the data into an XML file type required by the Homeless Data Exchange website.

Report Name	Contact Name	Continuum Name	Start Date	End Date
2010 AHAR	Camron	SpaceTimeContinuum	1/1/2011	3/31/2014
meg's test	Beezlebub	Road to Nowhere	10/1/2011	10/31/2012
	Darla	ESG	1/1/2012	3/31/2012
	Darla	1	1/1/2012	12/31/2012
	Jen R	CA CoC	1/1/2013	11/12/2013
	contact	continuum	12/2/2014	12/22/2014
	Test	Test	12/9/2014	3/31/2015

Step 1. Set up AHAR Options
 Step 2. Pull Unit/Bed Counts from ECM
 Step 3. Check/Correct Unit and Bed Capacities
 Step 4. Run AHAR Report
 Step 5. Generate AHAR XML File
 Delete Report

Done

System Wide Performance Measures

Objective: View, and refresh existing HUD reports.

Navigation: Administration>Reporting>Compliance Reports

CaseWorthy

Compliance Reports

HMIS / HUD Compliance Reports

CoC APR

ESG CAPER

HMIS APR

PATH

NIC

PIT

AHAR

Chronic Homeless List

System Wide Performance Measures

RHY


CoC Application 3B-2.8

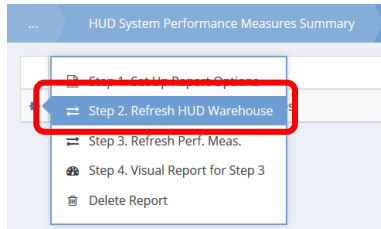
CSRG / ROMA Compliance Reports

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.

HUD System Performance Measures Summary + Add New

Report ID	Report Name	Start Date	End Date	Data Warehouse Refreshed	Perfm. Meas. Refreshed
1	Cam Perf Measures	10/1/2014	9/30/2015	12/8/2015 9:23 AM	

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.

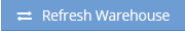
... HUD Data Warehouse Refresh History

ℹ As of CaseWorthy version 5.2.1, the HUD Performance Measures are the only Baseline Report that use this table. However, CaseWorthy plans to migrate the Data Quality report to use this Warehouse. After that, plans will be made to migrate the CoC APR and ESG CAPER to use this warehouse where possible. Customers are welcome to reference this table for Form Reports and Custom Reports

⚠ Refresh the HUD Data Warehouse only as often as Necessary. It is a heavy operation for the computers; your system will slow down significantly while attempting to fill the warehouse. The process may take upwards of 5-10 minutes (depending on the size of your database)

HUD_Warehouse_RefreshHistory.HUD_Warehouse_RefreshHistoryID	Refresh History ID	Refresh Requested	Requested By	Refresh Completed
	1	12/8/2015 9:23 AM	cameron	12/8/2015 9:23 AM

Refresh Warehouse Done

Click the  button. A new line appears with data from the refresh.

... HUD Data Warehouse Refresh History

View HUD Warehouse

ℹ As of CaseWorthy version 5.2.1, the HUD Performance Measures are the only Baseline Report that use this table. However, CaseWorthy plans to migrate the Data Quality report to use this Warehouse. After that, plans will be made to migrate the CoC APR and ESG CAPER to use this warehouse where possible. Customers are welcome to reference this table for Form Reports and Custom Reports

⚠ Refresh the HUD Data Warehouse only as often as Necessary. It is a heavy operation for the computers; your system will slow down significantly while attempting to fill the warehouse. The process may take upwards of 5-10 minutes (depending on the size of your database)

HUD_Warehouse_RefreshHistory.HUD_Warehouse_RefreshHistoryID	Refresh History ID	Refresh Requested	Requested By	Refresh Completed
	1	12/8/2015 9:23 AM	cameron	12/8/2015 9:23 AM
	2	5/17/2016 3:21 PM	doc	5/17/2016 3:21 PM

To view the data warehouse, click the  button.

The HUD Data Warehouse form displays.

... HUD Data Warehouse

ⓘ As of CaseWorthy version 5.2.1, the HUD Performance Measures are the only Baseline Report that use this table. However, CaseWorthy plans to migrate the Data Quality report to use this Warehouse. After that, plans will be made to migrate the CoC APR and ESG CAPER to use this warehouse where possible. Customers are welcome to reference this table for Form Reports and Custom Reports

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

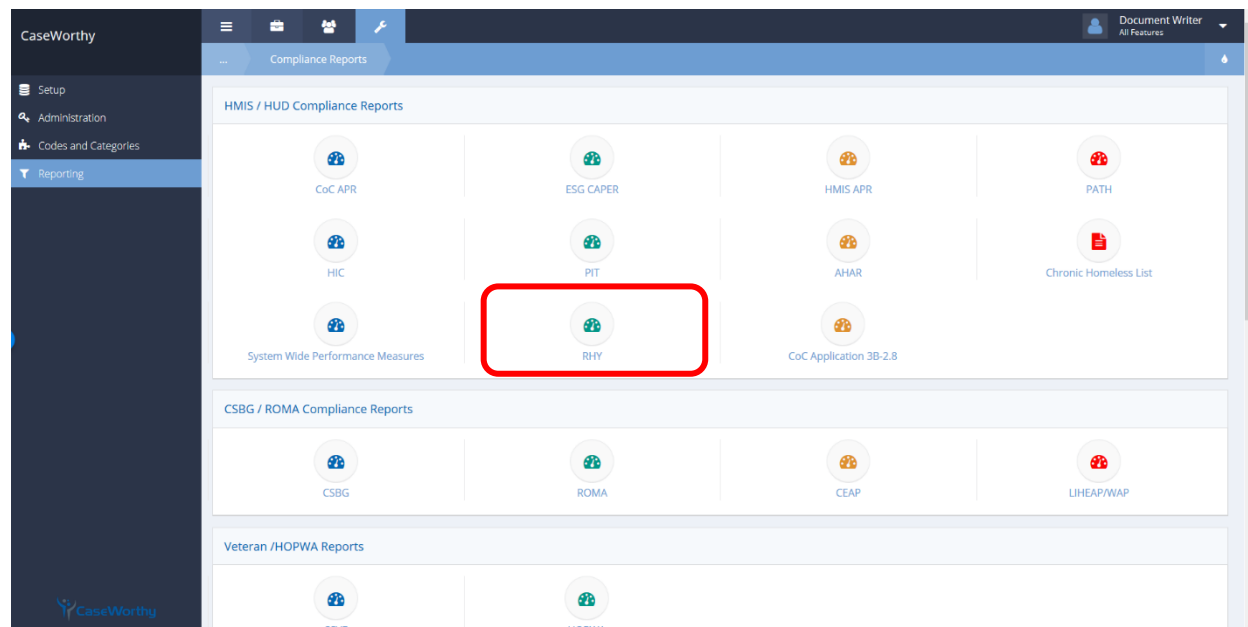
Done

Click the Done 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.

The screenshot shows the 'RHY Report' form. At the top, there's a 'Save Report Parameters' section with a dropdown menu and 'Edit' and 'Save' buttons. Below this is a 'Select the report criteria.' section. It contains five fields: 'Report Begin Date' with a calendar icon, 'Report End Date' with a calendar icon, 'Organization(s)' with radio buttons for 'All' and 'Some', 'Program(s)' with radio buttons for 'All' and 'Some', and 'Provider(s)' with radio buttons for 'All' and 'Some'. At the bottom right, there are two buttons: 'CSV Export' and 'Done'. The 'Done' button is highlighted with a red rectangular border.

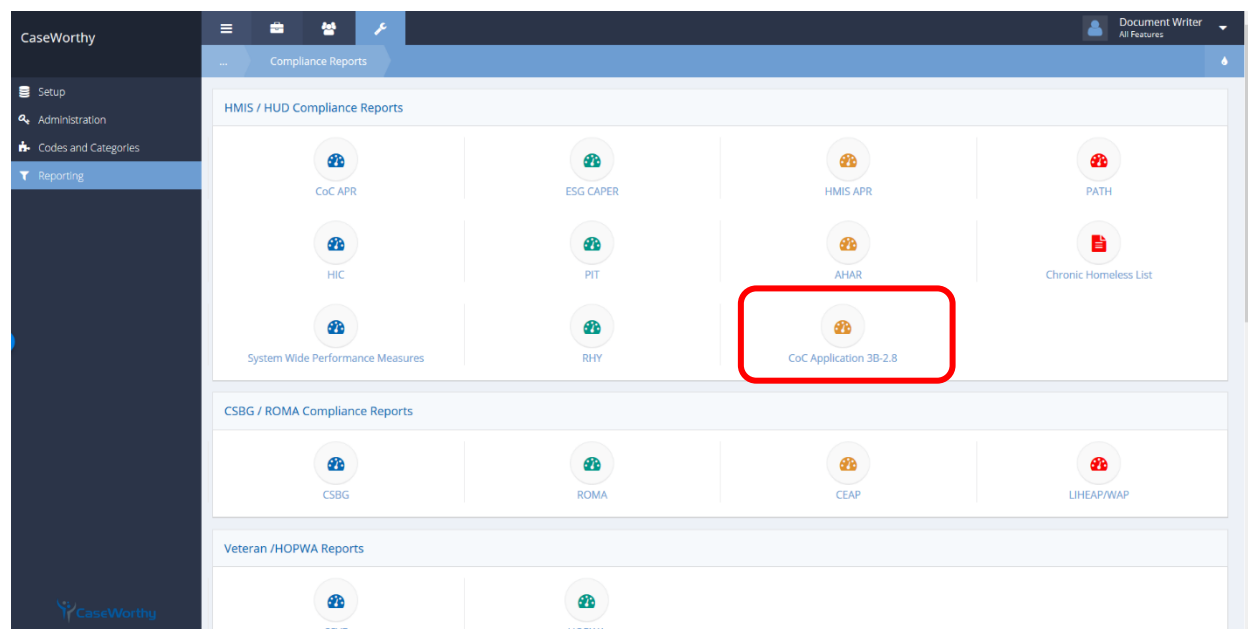
Enter information into required fields: Report Begin Date, Report End date, Organization(s), Program(s), and Provider(s). Fill remaining fields as desired. To view or add scheduled reports click the **Scheduled Reports** button. To export, click the **CSV Export** button.

Click the **Done** button when finished.

CoC Application 3B-2.8

Objective: Create CoC Application 3B-2.8 reports.

Navigation: Administration>Reporting>Compliance Reports



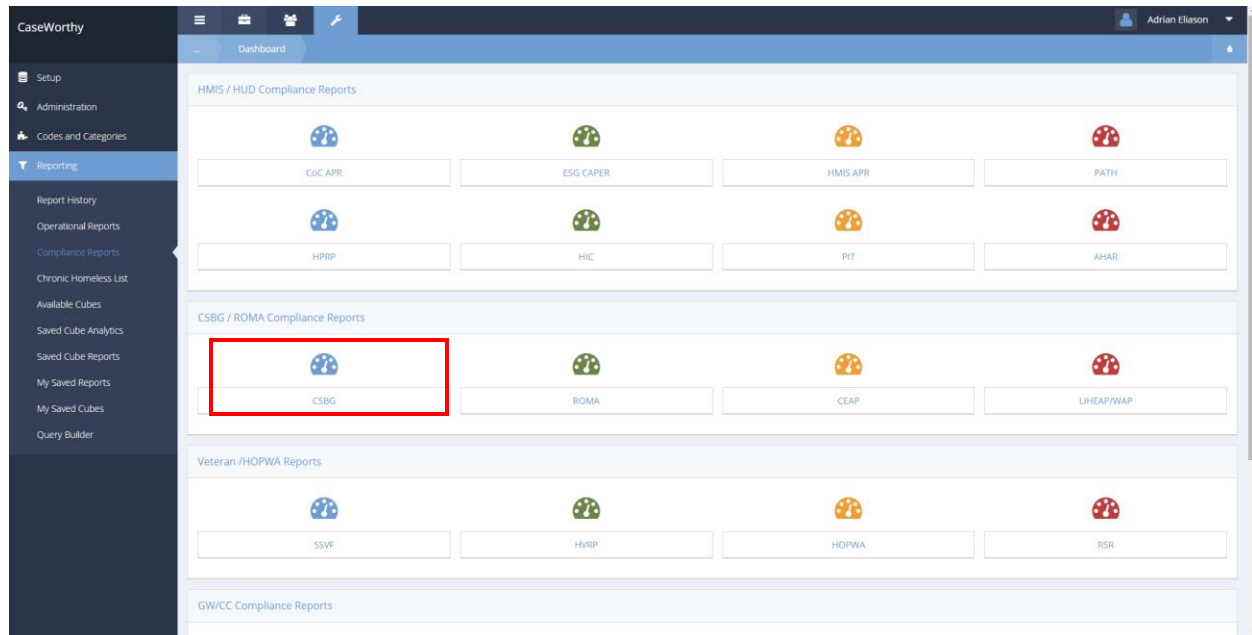
Select the CoC Application 3B-2.8 from the HMIS / HUD Compliance Reports portion of the Compliance Reports dashboard. The CoC Application 3B-2.8 form displays.


The screenshot shows the 'CoC Application 3B-2.8' report form. At the top, there's a header bar with the title 'CoC Application 3B-2.8' and a 'Scheduled Reports' button. Below the header, there's a 'Save Report Parameters' section with a dropdown menu and 'Edit' and 'Save' buttons. The main section is titled 'Select report criteria.' and contains several fields: 'Start Date' and 'End Date' (both with calendar icons), 'Organization(s)' (with radio buttons for 'All' and 'Some'), 'Project(s)' (with radio buttons for 'All' and 'Some'), and 'CoC Code(s)' (with radio buttons for 'All' and 'Some'). At the bottom right, there are two buttons: 'Report' and 'Done'. The 'Done' button is highlighted with a red rectangle.

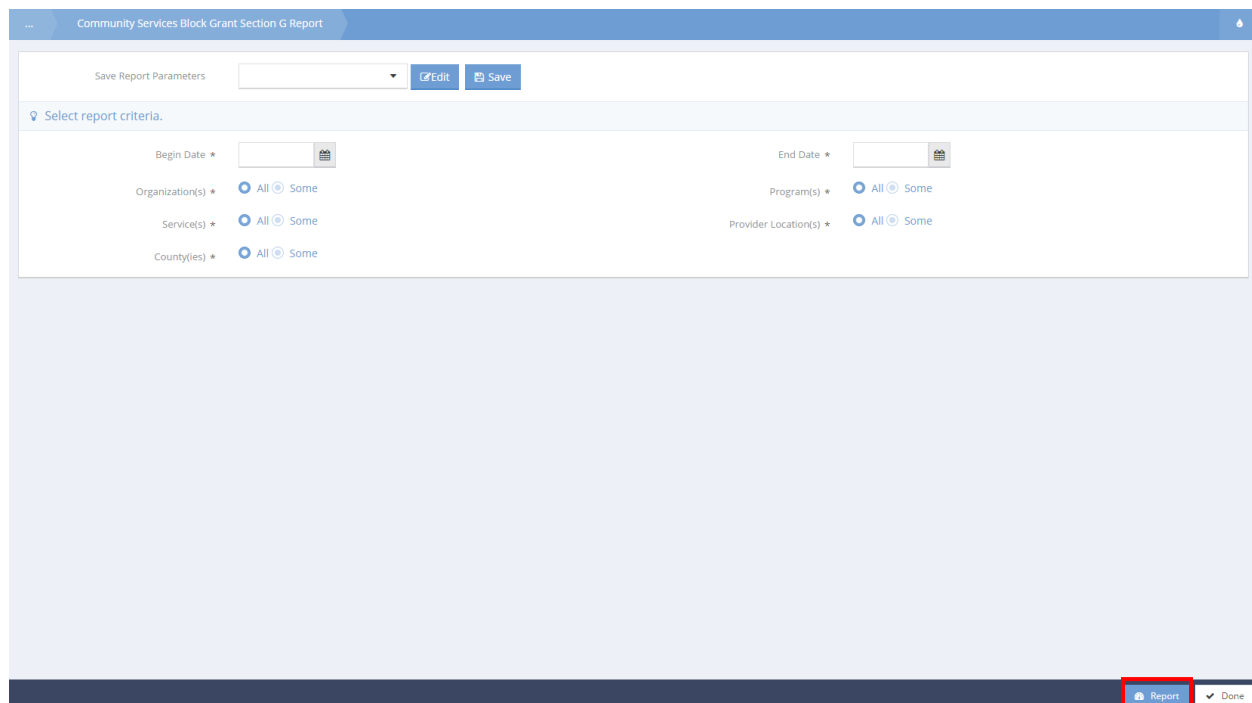
Enter information into required fields: Start Date, End Date, Organization(s), Project(s), and CoC Code(s). Fill remaining fields as desired. To view or add scheduled reports, click the **Scheduled Reports** button. To export a report, click the **Report** button. A new pop-up window opens. Click the **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.

The screenshot shows the CaseWorthy dashboard with a sidebar menu on the left and a main content area. The sidebar menu includes options like Setup, Administration, Codes and Categories, Reporting, 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 main content area displays several report categories: HMIS / HUD Compliance Reports, CSBG / ROMA Compliance Reports, Veteran / HOPWA Reports, and GW/CC Compliance Reports. Each category contains a grid of report icons. The ROMA icon, located in the CSBG / ROMA Compliance Reports section, is highlighted with a red rectangular box.


To create a new ROMA report, click the **+ Add New** button.

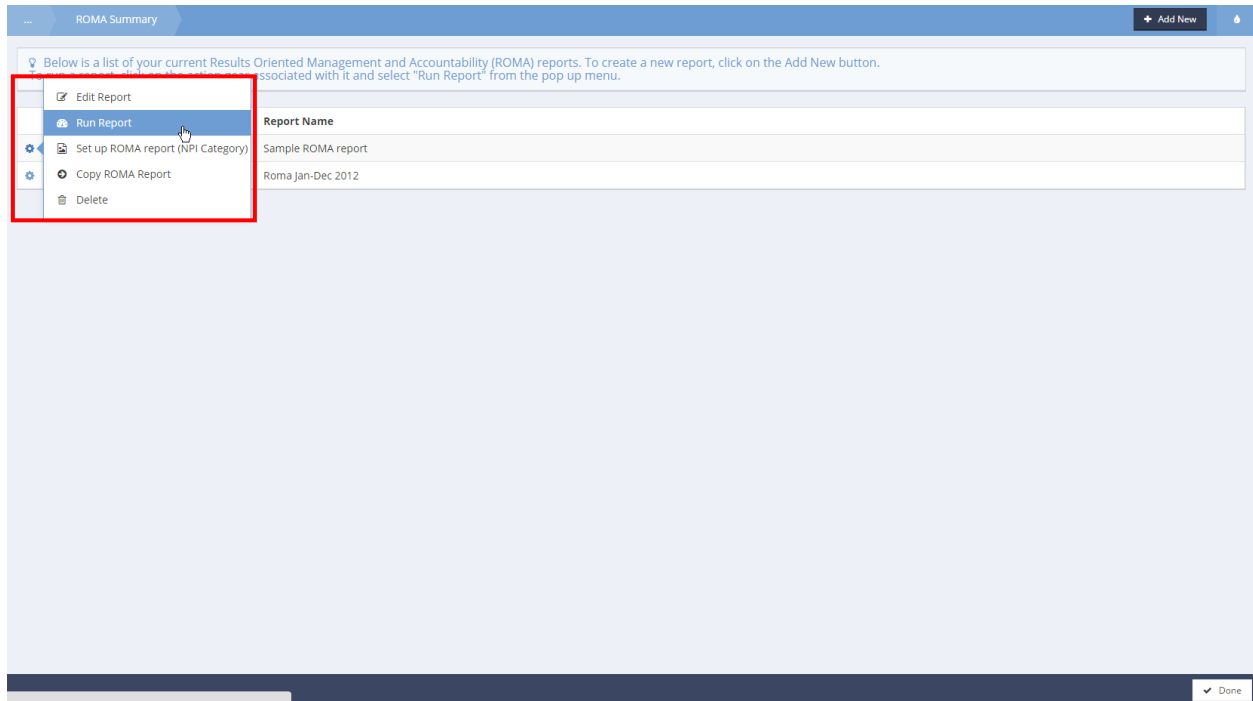
The screenshot shows the 'ROMA Summary' interface. At the top right, there is a blue bar with a '+ Add New' button highlighted in red. Below this bar, a message states: 'Below is a list of your current Results Oriented Management and Accountability (ROMA) reports. To create a new report, click on the Add New button. To run a report, click on the action gear associated with it and select "Run Report" from the pop up menu.' Below the message is a table with two columns: 'ID' and 'Report Name'. The table contains two rows: one with ID 12 and Report Name 'Sample ROMA report', and another with ID 15 and Report Name 'Roma Jan-Dec 2012'. At the bottom right of the interface, there is a 'Done' button.

ID	Report Name
12	Sample ROMA report
15	Roma Jan-Dec 2012

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.

The screenshot shows the 'NPI ROMA' interface. At the top right, there is a blue bar with a '+ Add New' button highlighted in red. Below this bar, a message states: 'Create a name for your National Performance Indicators (NPI) Results Oriented Management and Accountability (ROMA) report and select report criteria.' Below the message is a form with the following fields: 'ReportName *' (text input), 'Begin Date *' (date picker), 'End Date *' (date picker), 'Organization(s)' (dropdown menu with 'All' and 'None' buttons), and 'Program(s) *' (dropdown menu with 'All' and 'None' buttons). Below the form, there is a checkbox labeled 'Print Report Options'. At the bottom right of the interface, there are 'Save' and 'Cancel' buttons, with the 'Save' button highlighted in red.

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

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

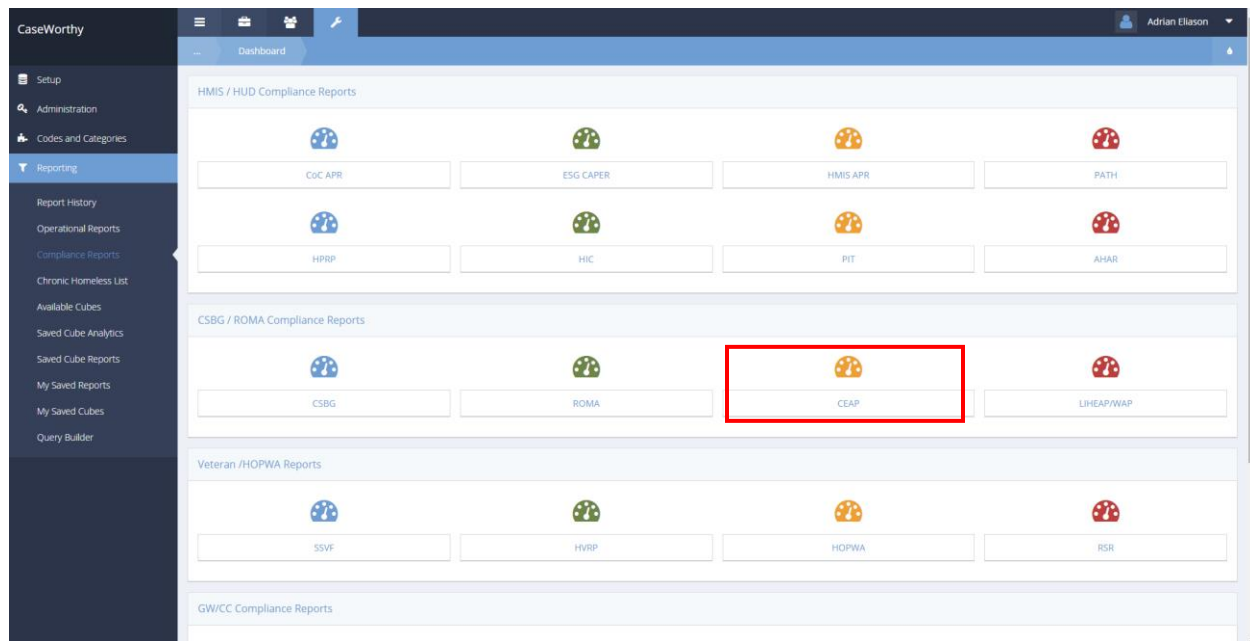
Community Improvement and Revitalization	1	2	3
Increase in, or preservation of opportunities and community resources or services for low-income people in the community as a result of community action projects/ initiatives or advocacy with other public and private agencies, as measured by one or more 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 screenshot shows the 'CEAP Report' configuration page. At the top, there's a 'Save Report Parameters' section with an 'Edit' button and a 'Save' button. Below this is a section for entering the Year (Grant) Start Date, Period Begin Date, Period End Date, Organization(s), and Program(s). The 'Year (Grant) Start Date' is set to 12/22/2014. The 'Period Begin Date' is set to 12/22/2014. The 'Period End Date' is set to 12/22/2014. The 'Organization(s)' are set to 'All' and 'Some'. The 'Program(s)' are set to 'All' and 'Some'. At the bottom right, there is a 'Report' button highlighted with a red box and a 'Done' button.

The report displays in a new window.

CEAP						
Run By aelason - 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					

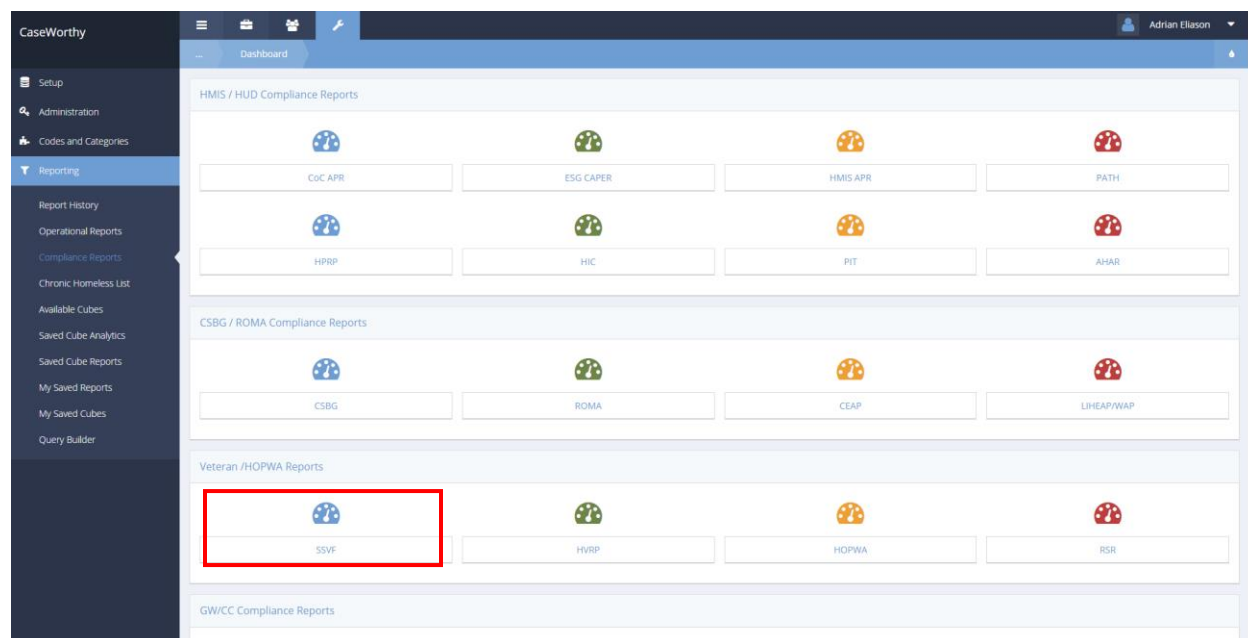
Summary with Drilldowns			Household Crisis		Utility Assistance	
County	Period	Year	Period	Year	Period	Year
Duplicated Households	176	176	0	0	0	0
Duplicated Individuals	400	400				
Unduplicated Households	34	34	0	0	4	4
Unduplicated Individuals	45	45			11	11
Applicant Households	130	130	0	0	7	7


IVA 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

IVA 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.

SSVF Report

Save Report Parameters [Edit](#) [Save](#)

Select the report criteria.

Grant Begin Date *

Report Begin Date *

Report End Date *

Organization(s) * ☐ All ☒ Some

Program(s) * ☐ All ☒ Some

Provider(s) * ☐ All ☒ Some

CSV Export XML Export **Report** Done

The report displays in a new window.

SSVF Coversheet						
Run By aetlason - 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					

Overview						
Total Number of Persons Served	2					

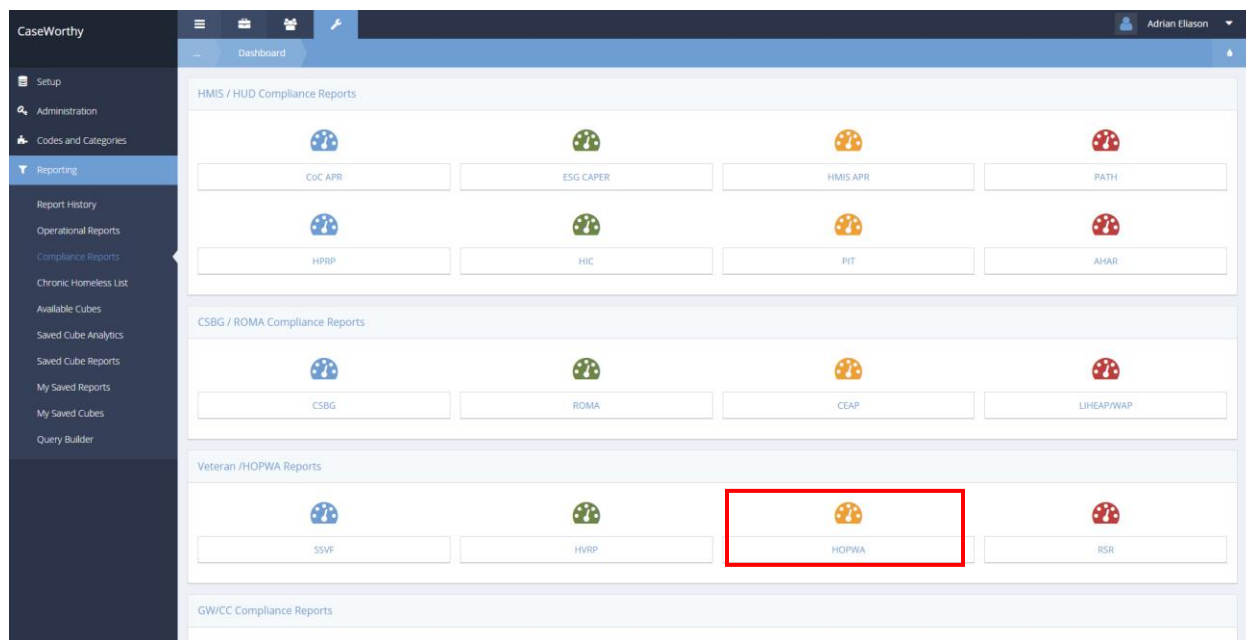
Summary						
	Homelessness Prevention		Rapid Re-housing		Unduplicated Total	
	Report Period	GTD	Report Period	GTD	Report Period	GTD
Persons Screened but not Enrolled						
Households Served	2	2	0	0	2	2
New Households Enrolled	2	2	0	0	2	2
Persons Served	2	2	0	0	2	2
Persons Exiting	0	0	0	0	0	0
Veterans 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

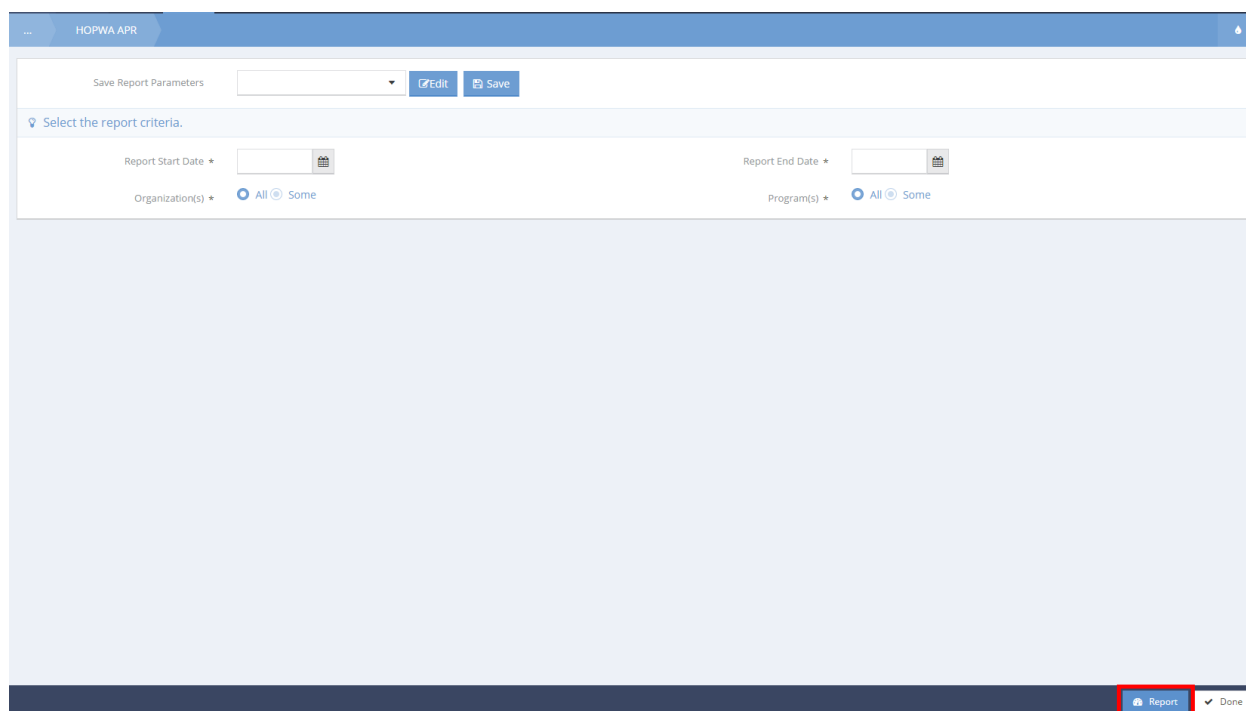
SSVF Coverage Page 1 of 3

HOPWA

To run a HOPWA report, click the HOPWA icon.



Enter a report start date and end date. Choose any organizations and programs. Click  **Report** when finished.



The report displays in a new window.

HOPWA APR

Run By aetiason - 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

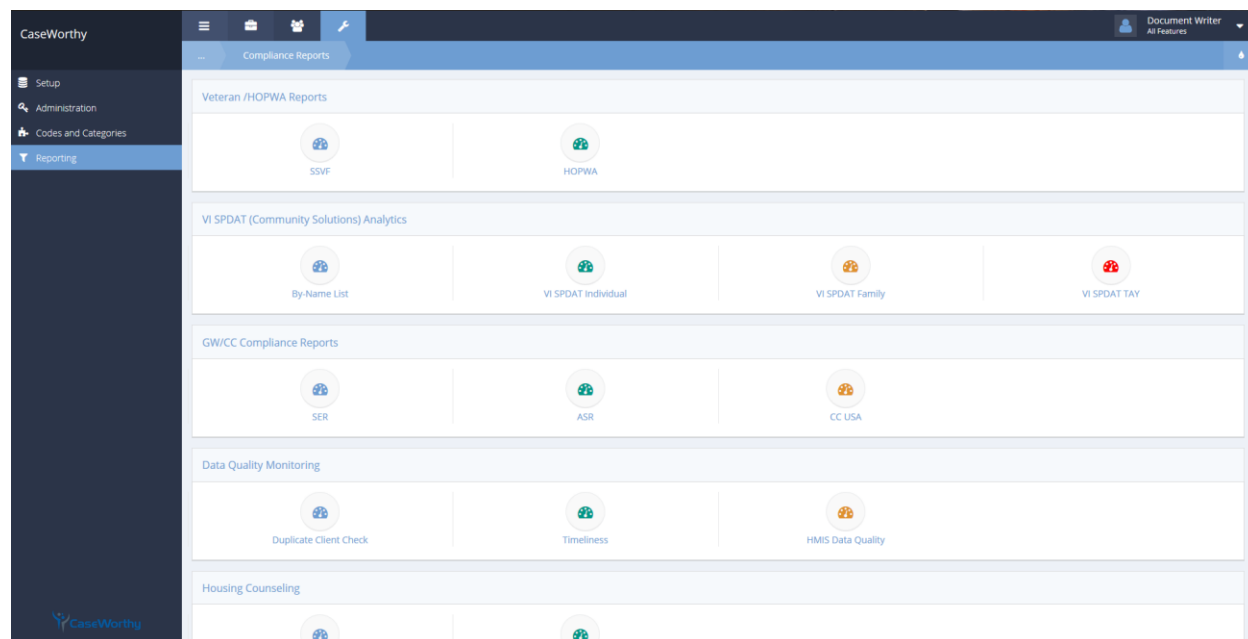
HOPWA APR Report

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)

By-Name List of People Experiencing Homelessness

Scheduled Reports

Community Solutions, the agency mastermind behind VISPDAT, collaborated with HUD to determine the HMIS system elements necessary to generate the "Community Solutions Aggregate Report." The Community Solutions Aggregate Report is not a requirement for HUD funding.

At this point, CaseWorthy has not been asked to generate the The Community Solutions Aggregate Report, but several CaseWorthy stakeholders have requested that CaseWorthy generate the By-Name List Report.

What is the By-Name List Report? 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.

Save Report Parameters

Select report criteria.

Start Date *


End Date *

Organization(s) * ☒ All ☐ Some

Project(s) * ☒ Some

Report Done

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  Report 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.

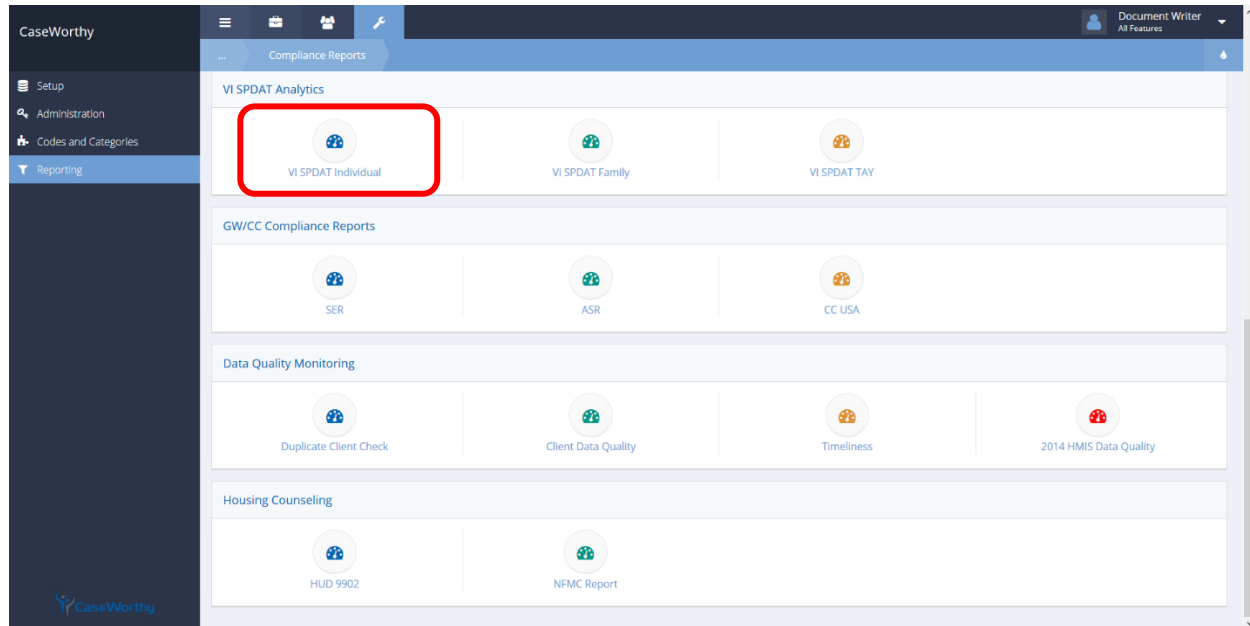
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
1	Date Range, Year	Total Sum of Client ID												
2	2016	46,272.00												
3	Grand Total	46,272.00												
4														
5														
6														
7														
8														
9														
10														
11														
12														
13														
14														
15														
16														
17														
18														
19														
20														
21														
22														
23														
24														

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.

Save

Views

Grid

Charts

Format

Options

Collapse

Expand

Export

1	2	3	4	5	6	7	8
* First Name	Total Sum of AssessVISPDAT.AssessmentID						
ASRFirst	11,554.00						
Adele	9,836.00						
Alice	11,455.00						
Allen	7,558.00						
Angelica	15,118.00						
Angie	7,296.00						
April	13,130.00						
Barry	11,132.00						
Bill	7,407.00						
Bob	14,741.00						
Brad	8,643.00						
Bub	7,320.00						
Casey	12,074.00						
Charlie	12,094.00						
Chipotle	8,620.00						
Cindy	7,263.00						
Daily	7,570.00						
Darkene	15,337.00						
Dave	7,552.00						
Elizabeth	15,121.00						
Elle	11,437.00						
Frank	7,295.00						

Drag Dimensions

DOB

Assessment.ClientID

AssessVISPDAT.Ass...

First Name

Homeless Episodes

Interview Location

Last Name

Length of Time Hom...

Survey Date

Survey Date Full

Version

Version 2 Score

Veteran Status

VI SPDAT Score

Add calculated value

Drop & Arrange Report Filter

First Name

Drop & Arrange Rows

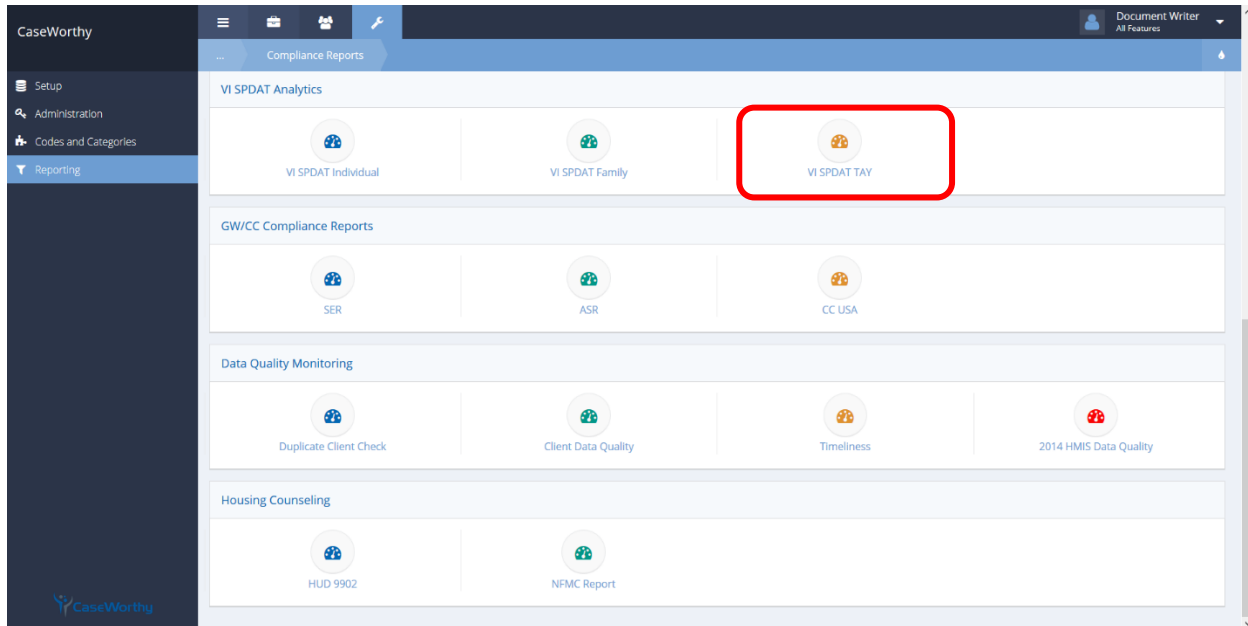
Drop & Arrange Columns

Drop & Arrange Values

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.

...							
<div> <div>Save</div> <div>Views</div> <div>Grid</div> <div>Charts</div> <div>Format</div> <div>Options</div> <div>Collapse</div> <div>Expand</div> <div>Export</div> </div>							
1	2	3	4	5	6	7	8
1	* Program	Total Sum of AssessmentID					
2	VI SPDAT Individual Version 2	76,536.00					
3	Grand Total	76,536.00					
4							
5							
6							
7							
8							
9							
10							
11							
12							
13							
14							
15							
16							
17							
18							
19							
20							
21							
22							
23							
24							

Drag Dimensions

DOB

Survey Date

Agency

AssessmentID

ClientID

First Name

Homeless Episodes

Interview Location

Interviewer

Language

Last Name

Length of Time Hom...

Nickname

Organization

Program

Survey Date Full

VI SPDAT Score

Add calculated value

Drop & Arrange Report Filter

Drop & Arrange Rows

Program

Drop & Arrange Columns

Σ Values

Drop & Arrange Values

Sum of AssessmentID Σ-

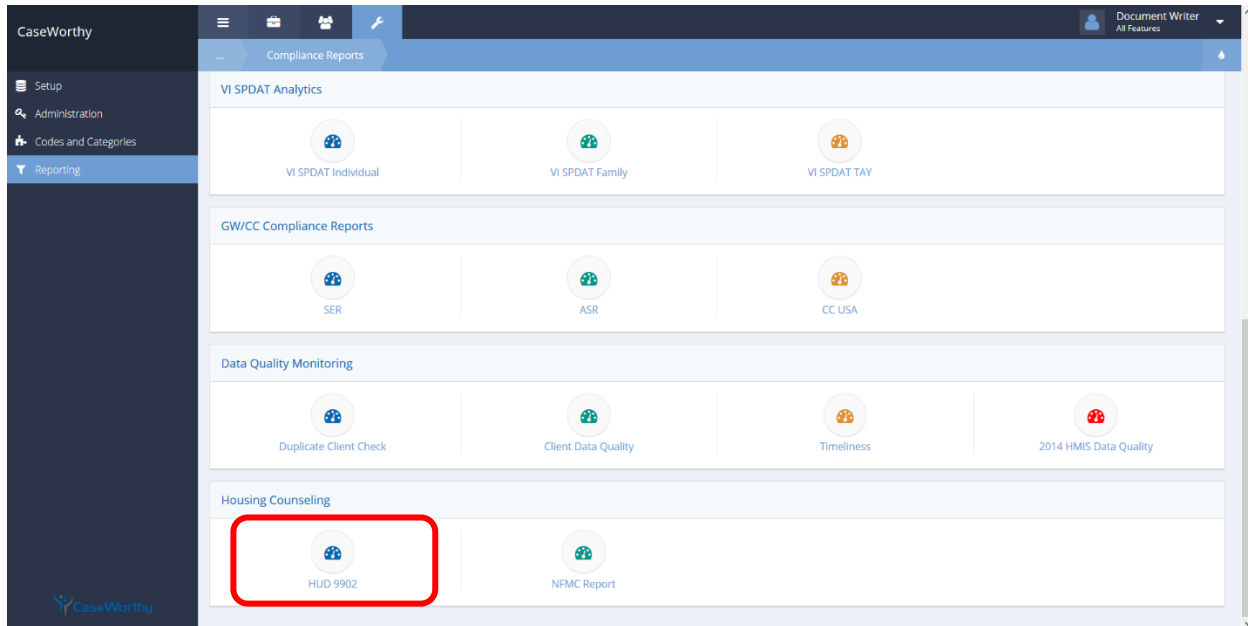
OK

Cancel

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.

HCS 9902 Report Summary							
						Task Status	+ Add New
Description	Start Date	End Date	Reporting Month	Report Period	Agency Provider	HCS Report ID	
General Housing Counseling Program Q4	10/1/2015	12/31/2015	January	Quarter 4	Catholic Charities	4	
TEST	1/1/1950	12/20/2015	January	Quarter 2	CaseWorthy	3	
Test 1	8/1/2015	8/31/2015	January	Quarter 3	CCA	2	

Click the **Task Status** button to view task status.
The Batch Tasks form displays.

Task Status

Batch Tasks

Recurring Tasks + New Task

Desired Start Time Between 05/17/2016 through 05/17/2016 Status

Search

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.

Task Status

Batch Tasks

Recurring Tasks + New Task

Desired Start Time Between 05/20/2016 through 07/01/2016 Status

Search

Task Object	Start Time	Status	Description
9902 Submission	5/20/2016 2:30 PM	Completed with errors	New Task

Done


To view a task, click the action gear icon associated with the desired task and select View Task.

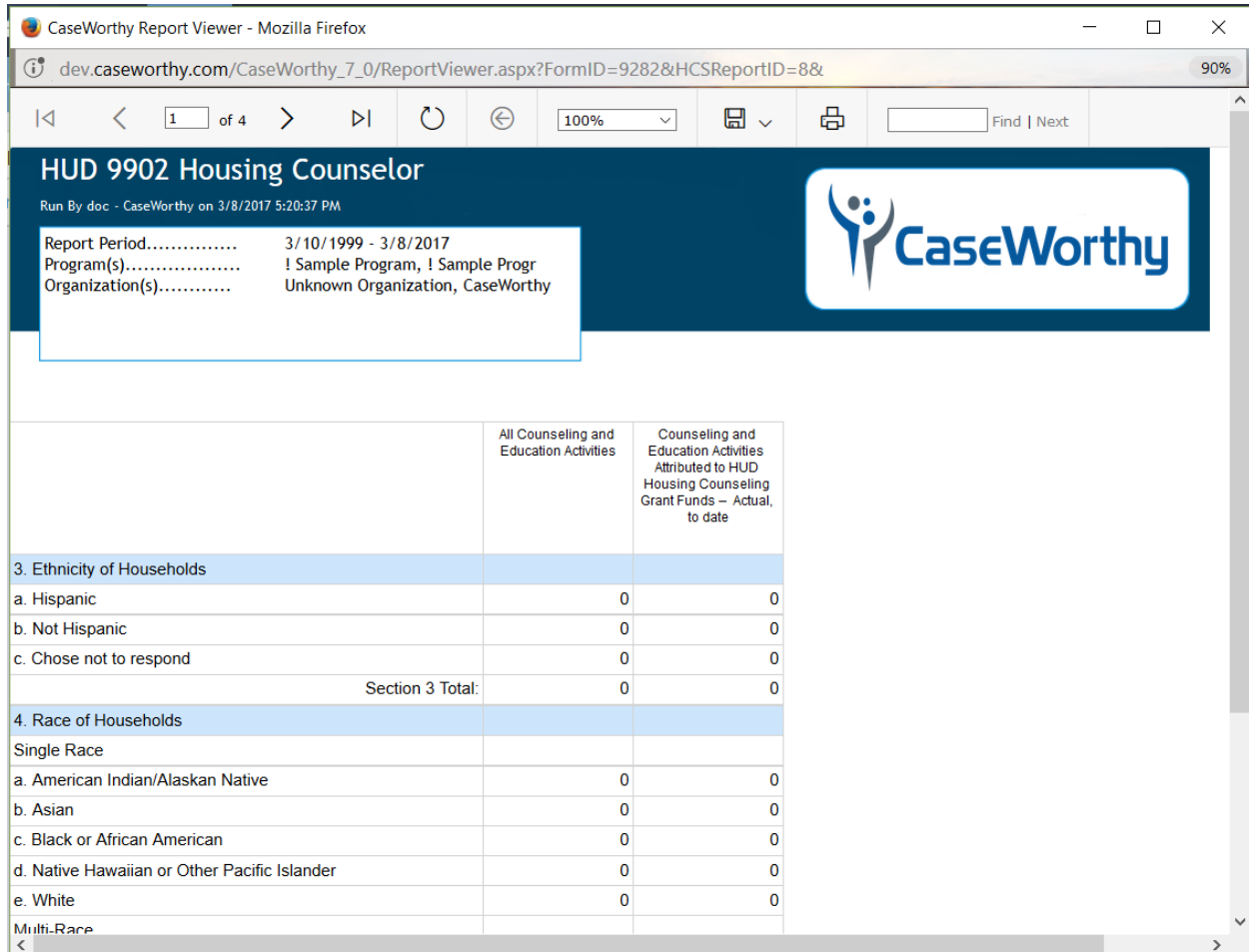
Click the **Done** button when finished.

View a previous HUD 9902 report from the HCS 9902 Report Summary form.

... HCS 9902 Report Summary Task Status Add New

	Description	Start Date	End Date	Reporting Month	Report Period	Agency Provider	HCS Report ID
⚙	Doc Writer Test	3/10/1999	3/8/2017	January	Quarter 1	CaseWorthy	8

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

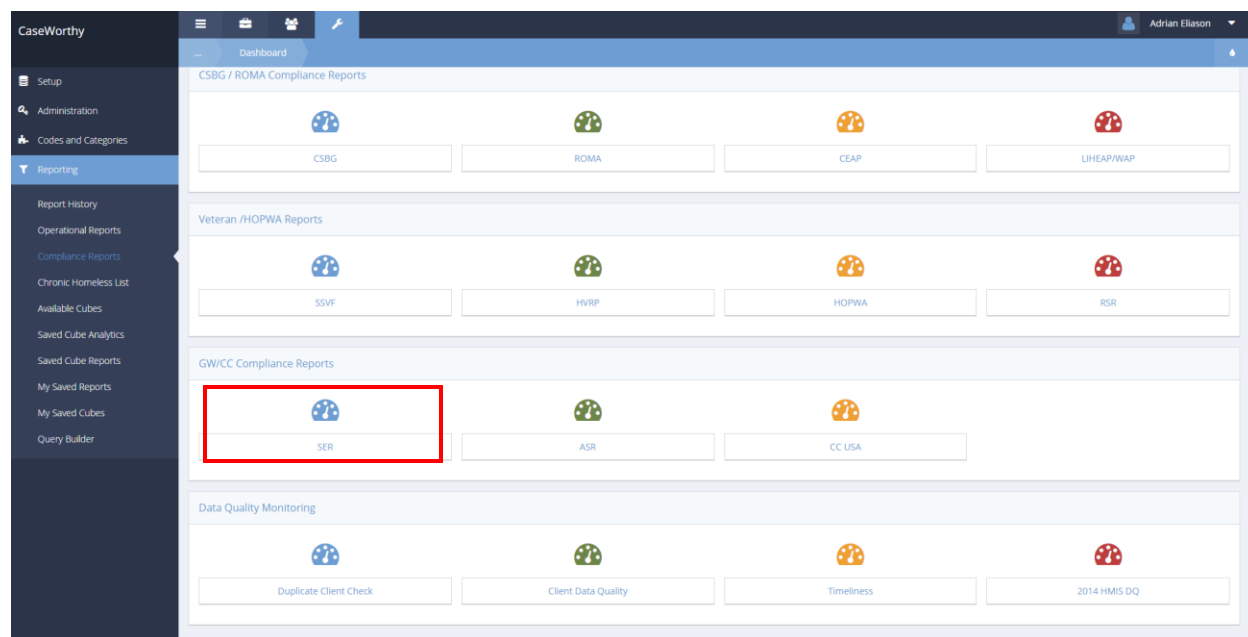
Run By doc - CaseWorthy on 3/8/2017 5:20:37 PM

Report Period..... 3/10/1999 - 3/8/2017
 Program(s)..... ! Sample Program, ! Sample Progr
 Organization(s)..... Unknown Organization, CaseWorthy

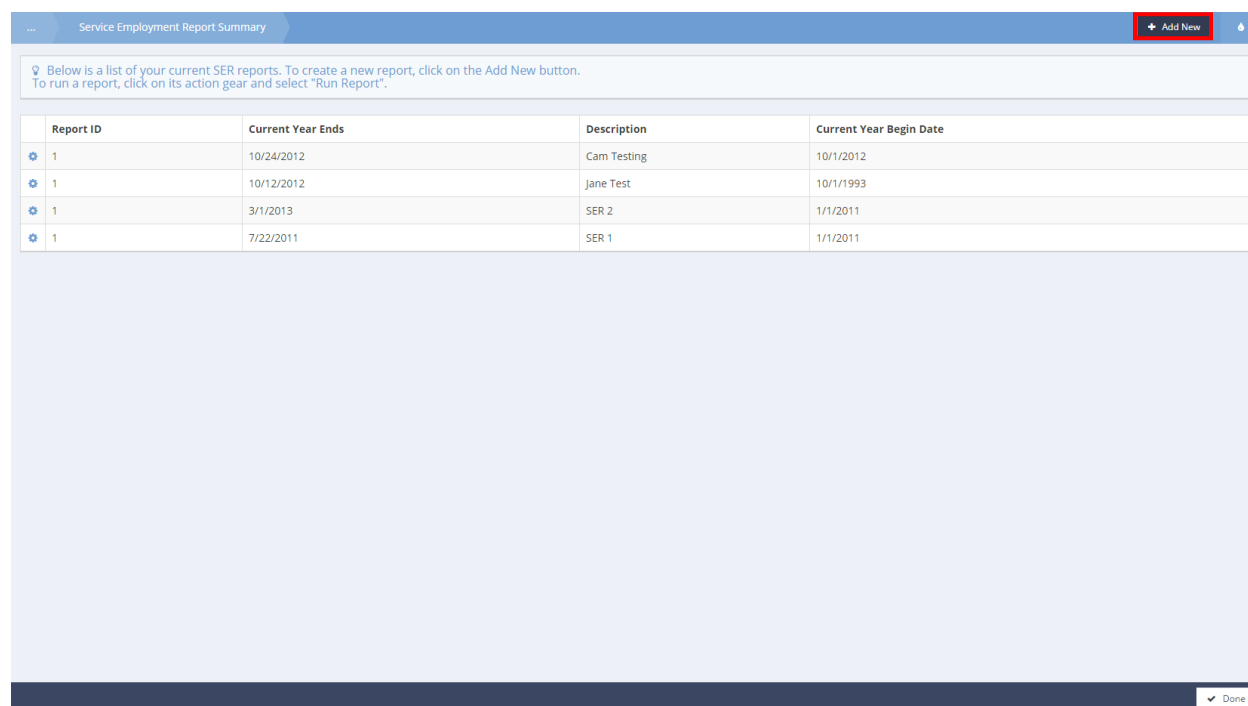
	All Counseling and Education Activities	Counseling and Education Activities Attributed to HUD Housing Counseling Grant Funds - Actual, to date
3. Ethnicity of Households		
a. Hispanic	0	0
b. Not Hispanic	0	0
c. Chose not to respond	0	0
Section 3 Total:	0	0
4. Race of Households		
Single Race		
a. American 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.

... Add Service Employment Report

Create a title for your SER and add begin and end dates.

Report Title *

Begin Date *


End Date *

Organization(s) * Choose Options...

Service(s) * Choose Options...





Check the box below if you choose to print the report options on the last page of this report. These options provide the necessary information about criteria used to generate the report.

Print Report Options ☐

Click the action gear  next to a report and click Run Report.

... Service Employment Report Summary

Below is a list of your current SER reports. To create a new report, click on the Add New button. To run a report, click on its action gear and select "Run Report".

	Current Year Ends	Description	Current Year Begin Date
 Setup Basic SER Options	10/24/2012	Cam Testing	10/1/2012
 Enter Programs and SER Goals	10/12/2012	Jane Test	10/1/1993
 Run Report	3/1/2013	SER 2	1/1/2011
 Delete	7/22/2011	SER 1	1/1/2011

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

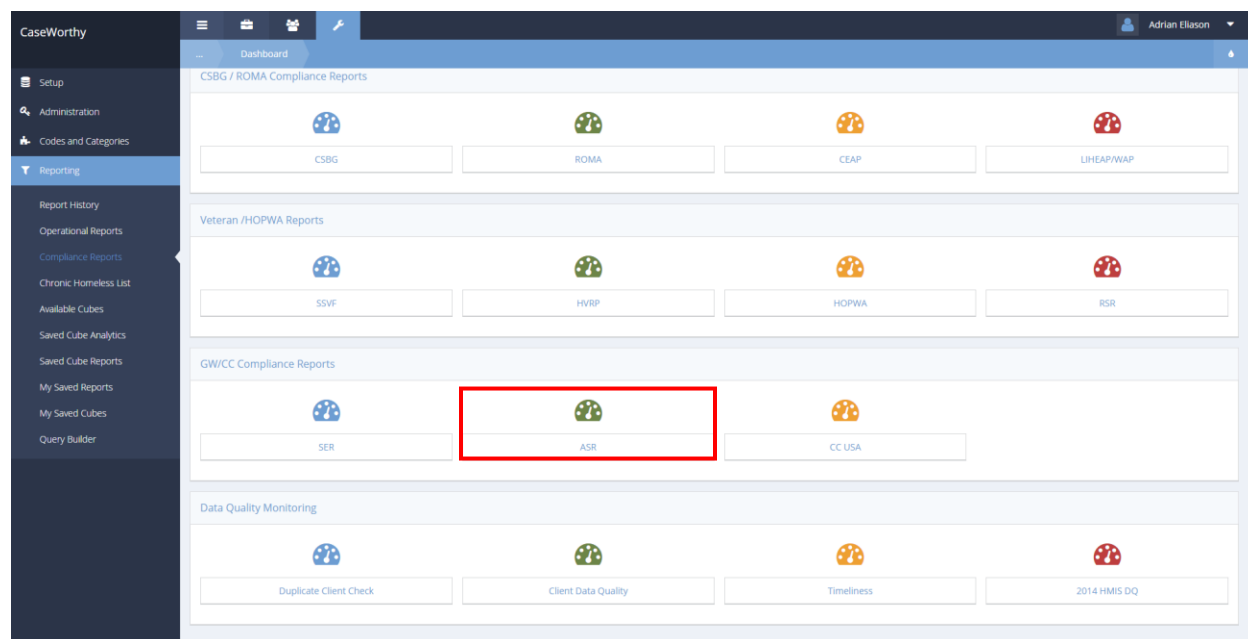
Page 1 of 1

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.

... Annual Statistics Report Summary + Add New

Below is a list of your current ASR reports. To create a new report, click on the Add New button. To run a report, click on its action gear and select "Run ASR".

Description	Begin Date	End Date
-------------	------------	----------

Done

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.

... Set Up Annual Statistics Report

Description *

Begin Date *

End Date *

Organization(s) * All None

Choose Options...

Program Category *

Select service category mappings for sections 2a) - 2c)

2a) Basic Services

2b) Organizational Intensive

2c) Job Placement Intensive

Select service category mappings for sections 9a) - 9at)

9a) Intake/Eligibility of an individual for a service

9b) Incidences of Work Assessment/Evaluation for an individual

9c) Sessions of Job Readiness/Soft-Skills Training/Work Adjustment for an individual	<input type="text"/>
9d) Sessions of Occupational Skills Training for an individual	<input type="text"/>
9e) Number of days unpaid On-the-job Training within Goodwill for an individual	<input type="text"/>
9f) Number of days paid On-the-job Training within Goodwill (person served in paid training) for an individual	<input type="text"/>
9g) Number of days in On-the-job Training outside Goodwill	<input type="text"/>
9h) Sessions of Intensive Job Placement Services for an individual	<input type="text"/>
9i) Incidences of Job Center/Job Fair Services/Non-Intensive Job Placement Services for an individual	<input type="text"/>
9j) Incidences of Job Retention and/or Career Advancement Services for an individual	<input type="text"/>
9k) Incidences of Supported Employment service for an individual	<input type="text"/>
9l) Tutoring Sessions	<input type="text"/>
9m) English as a Second Language Sessions	<input type="text"/>
9n) GED Sessions	<input type="text"/>
9o) College Preparation Sessions	<input type="text"/>
9p) Post-secondary Credentialing Sessions	<input type="text"/>
9q) Youth Mentees Contact Hours	<input type="text"/>
9r) Adult Mentees Contact Hours	<input type="text"/>
9s) Youth Mentors Contact Hours	<input type="text"/>
9t) Adult Mentors Contact Hours	<input type="text"/>
9u) Financial Education Class Sessions	<input type="text"/>
9v) One-on-One Financial Coaching Sessions	<input type="text"/>
9w) Emergency Loans (provided or facilitated)	<input type="text"/>
9x) Matched Savings Beyond Retirement Accounts (provided or facilitated)	<input type="text"/>
9y) Days of Childcare Assistance	<input type="text"/>
9z) Number Childcare Referrals (provided or facilitated)	<input type="text"/>
9aa) Free or Low-Cost Tax Preparation (VITA) (ReturnsProcessed)	<input type="text"/>
9ab) SSI/SSDI (Referrals or Enrollments)	<input type="text"/>
9ac) Medicaid/Medicare (Referrals or Enrollments)	<input type="text"/>
9ad) Federal Earned Income Tax Credit (Claimed)	<input type="text"/>
9ae) Transportation Assistance (Trips)	<input type="text"/>
9af) E-learning Sessions	<input type="text"/>
9ag) Virtual Career Coaching Sessions	<input type="text"/>
9ah) Virtual Case Management Sessions	<input type="text"/>
9ai) E-mentoring Sessions	<input type="text"/>
9aj) Micro-Enterprise Training Sessions Provided	<input type="text"/>
9ak) Micro-Enterprise Loans Executed	<input type="text"/>
9al) Medical Rehabilitation (physical, occupational, speech, or other medical therapies)	<input type="text"/>
9am) Day Activities for Adults	<input type="text"/>
9an) Days of Residential Housing	<input type="text"/>
9ao) Day Camp Sessions	<input type="text"/>
9ap) Afterschool Sessions	<input type="text"/>

9a) Number of hours of service provided by court-referred volunteers	<input type="text"/>
9a) Number of hours of service provided by non-court-referred volunteers	<input type="text"/>
9a) Number of hours of services by corporate/professional volunteers	<input type="text"/>
9a) Other Services Not Entered Above	<input type="text"/>

Select provider category mappings for sections 11a) - 11w)

11a) State Vocational Rehabilitation agencies	<input type="text"/>
11b) Workforce Investment Act (Workforce Investment Boards, One Stop Centers, Individual Training Accounts)	<input type="text"/>
11c) Elementary/Middle Schools/High Schools	<input type="text"/>
11d) Post-Secondary Schools (Including Community Colleges, colleges and universities)	<input type="text"/>
11e) State Agency for the Blind	<input type="text"/>
11f) Veterans Affairs, Veteran Service Organizations	<input type="text"/>
11g) Department of Defense, Military Service Organizations	<input type="text"/>
11h) Private Pay/Walk Ins/ Self-Referral	<input type="text"/>
11i) Login/Phone in	<input type="text"/>
11j) Social Security Administration - Local SSA Office, CPP	<input type="text"/>
11k) Social Security Administration - Ticket-to-Work, ODSP	<input type="text"/>
11l) Mental Illness/Dev. Disability Agency	<input type="text"/>
11m) Corrections/Justice System	<input type="text"/>
11n) Housing Authorities and Agencies	<input type="text"/>
11o) TANF Administration/ Provincial Welfare Administration	<input type="text"/>
11p) Other Public Health, Human & Social Service Agencies	<input type="text"/>
11q) Private Rehabilitation Agencies	<input type="text"/>
11r) Worker's Compensation/Insurance Agencies	<input type="text"/>
11s) Local SNAP Agency, WIC	<input type="text"/>
11t) Employers	<input type="text"/>
11u) State/Local Area Agency on Aging	<input type="text"/>
11v) Faith-based Organizations	<input type="text"/>
11w) Other Private, Non-Profit (other CBOs, United Way, etc.)	<input type="text"/>

Select answers for sections 13a) - 13e)

13a) Operate Goodwill funded career center Y/N	<input type="text"/>
13b) Operate WIA funded One-Stop Career Center - Y/N	<input type="text"/>
13c) Operate career center funded by entity other than Goodwill or WIA - Y/N	<input type="text"/>
13c) Contributing partner to WIA funded One-Stop Career Center-- staff, financial, other resources - Y/N	<input type="text"/>
13d) Goodwill agency is a member of a local workforce investment board - Y/N	<input type="text"/>
13e) Goodwill agency is a member of the State Workforce Investment Board - Y/N	<input type="text"/>

Save


Cancel

Annual Statistics Report Summary

Below is a list of your current ASR reports. To create a new report, click on the Add New button.
To run a report, click on its action gear and select "Run ASR".

Description	Begin Date	End Date
Test	1/1/2014	12/31/2014
Test	12/1/2014	12/31/2014

Done


To view an ASR, click the action gear  and click Run ASR.

Annual Statistics Report Summary

Below is a list of your current ASR reports. To create a new report, click on the Add New button.
To run a report, click on its action gear and select "Run ASR".

Description	Begin Date	End Date
Test	1/1/2014	12/31/2014
Test	12/1/2014	12/31/2014

Done

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.

Annual Statistics Report Summary

Below is a list of your current ASR reports. To create a new report, click on the Add New button. To run a report, click on its action gear and select "Run ASR".

	Begin Date	End Date
	1/26/2015	1/29/2015

Done

CC USA

To run a CC USA report, click the CC USA icon.

CaseWorthy

Dashboard

CSBG / ROMA Compliance Reports

CSBG ROMA CEAP LIHEAP/WAP

Veteran /HOPWA Reports

SSVF HVRP HOPWA RSR

GW/CC Compliance Reports

SER ASR **CC USA**

Data Quality Monitoring

Duplicate Client Check Client Data Quality Timeliness 2014 HMIS DQ

Enter a Begin Date and an End Date. Choose any organizations and programs. Click **Report** when finished.

Catholic Charities USA Report

Save Report Parameters

Select the report criteria.

Begin Date *

End Date *

Organization(s) * ☒ All ☐ Some

Program(s) * ☒ All ☐ Some

The report displays in a new window.

CC USA	
Run By aeliason - CaseWorthy on 12/22/2014 10:59:35 AM	
Report Period.....	12/11/2014 - 12/22/2014
Program.....	All Programs
Organization(s).....	All Orgs

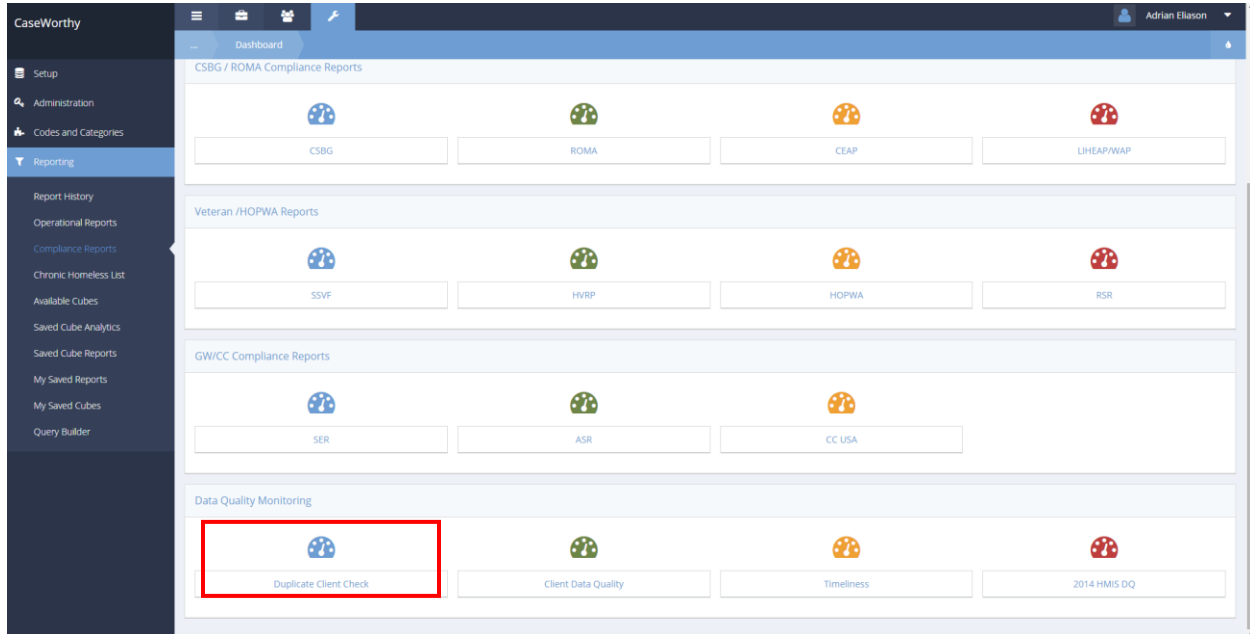
Table 1 Total Unduplicated Clients			
Children Adolescents (under 18)	Adults (18-64)	Seniors (65+)	Total
17	64	13	94

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

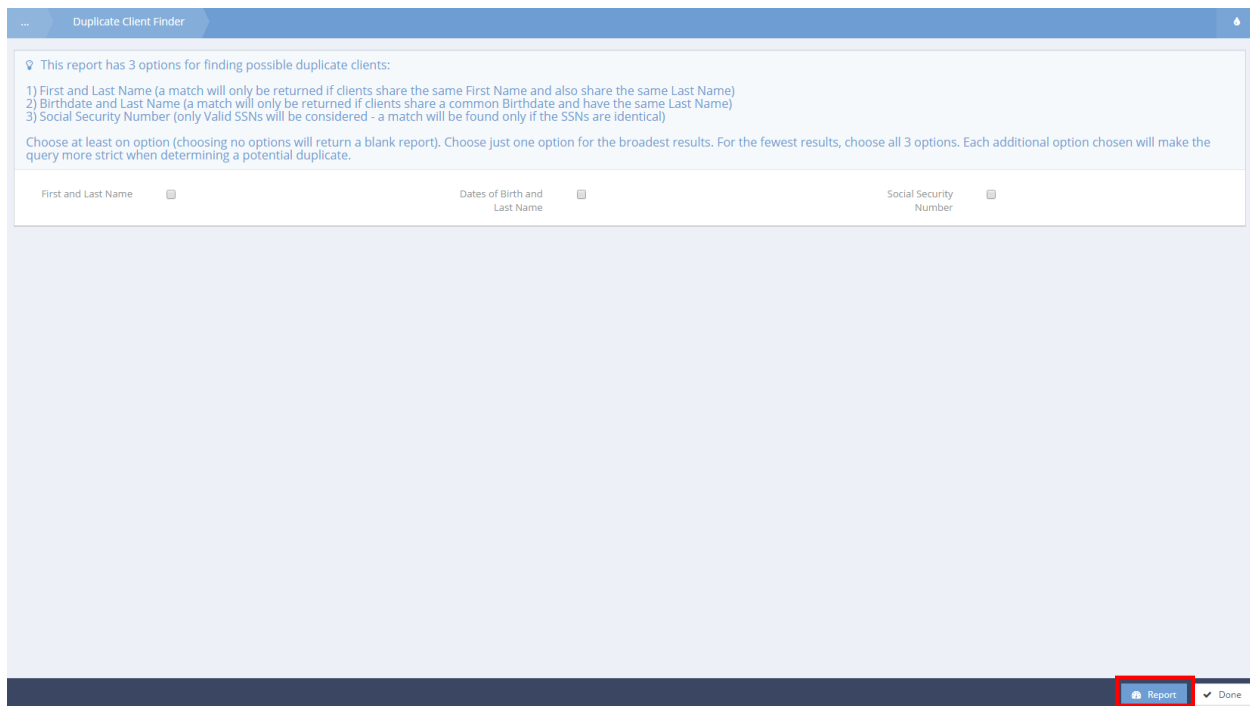
Duplicate Client Check

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  **Report** 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

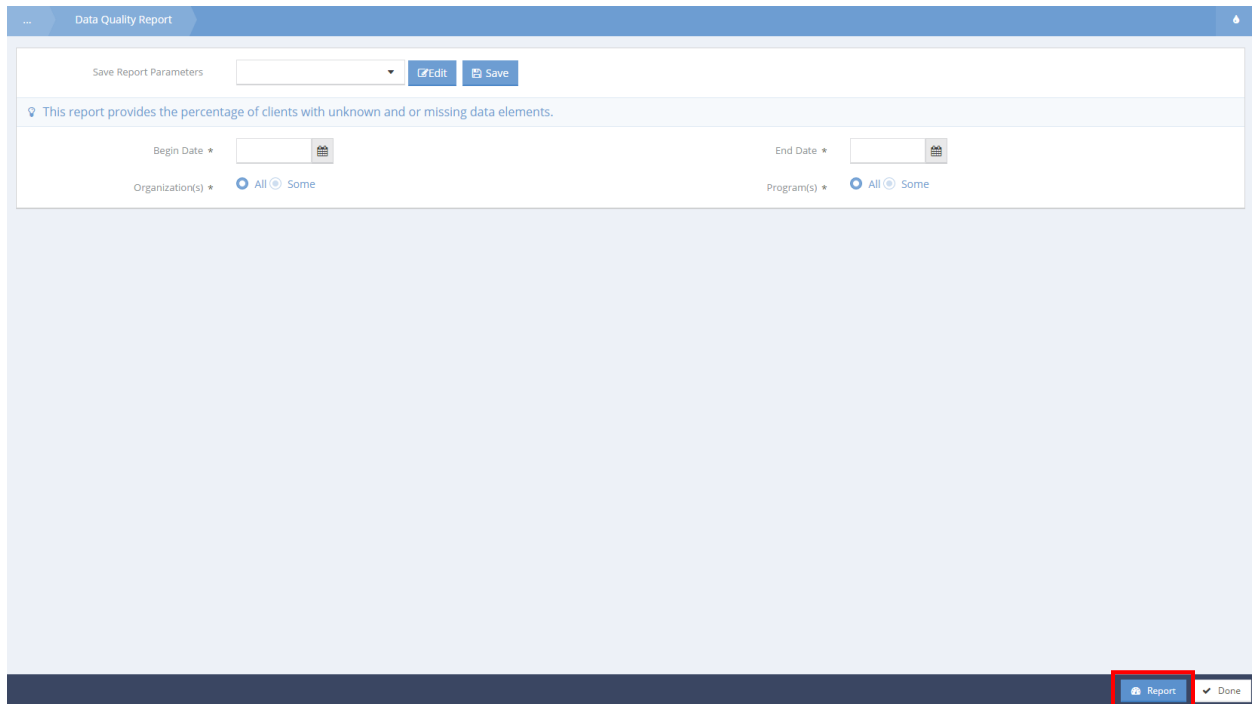
Page 1 of 34

Client Data Quality

To run a Client Data Quality report, click the Client Data Quality icon.

The screenshot shows the CaseWorthy dashboard interface. On the left is a navigation menu with options like Setup, Administration, Codes and Categories, and Reporting. The main area displays several report categories: CSBG / ROMA Compliance Reports, Veteran / HOPWA Reports, GW/CC Compliance Reports, and Data Quality Monitoring. The 'Data Quality Monitoring' section at the bottom features four icons representing different data quality checks. The 'Client Data Quality' icon, which is a green circle with a white dot, is highlighted with a red rectangular box.

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



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

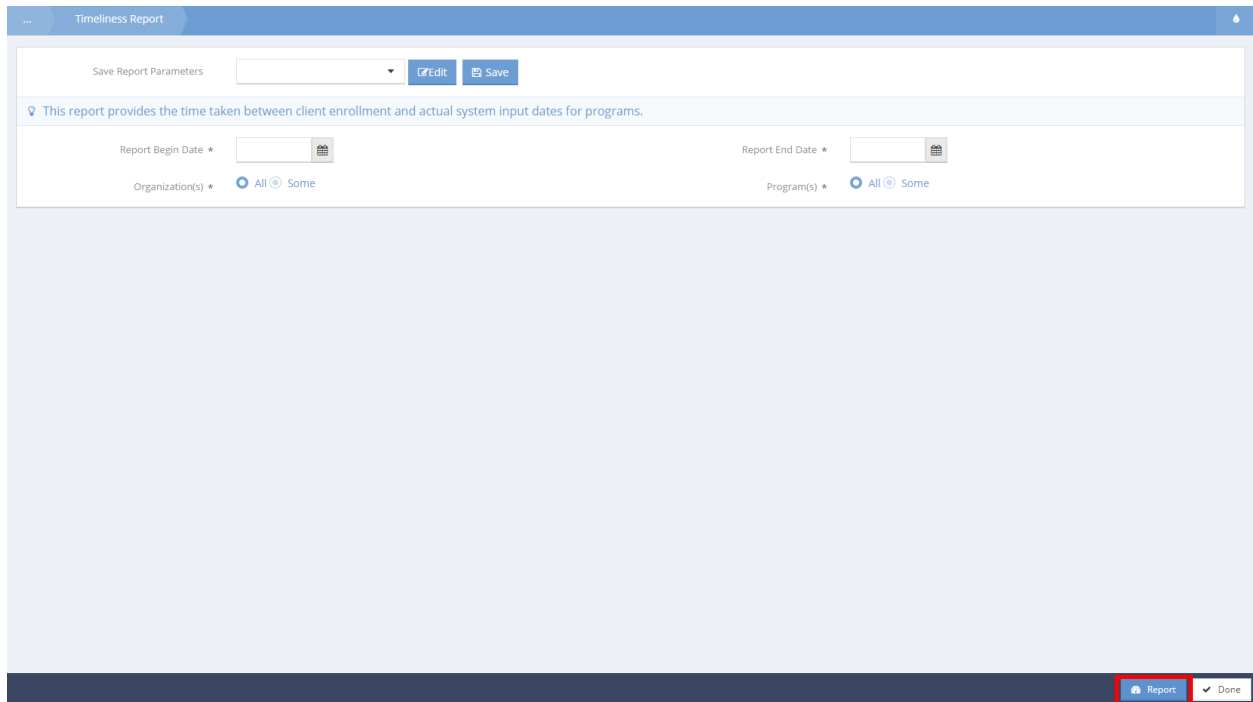
Data Element	Don't Know or Refused			Missing		
	Count	Actual (%)	Tolerance (%)	Count	Actual (%)	Tolerance (%)
First Name	1	0	5	0	0	0
Last Name	0	0	0	0	0	0
SSN	137	15	0	62	7	0
Date of Birth	0	0	10	43	5	10
Ethnicity	172	19	0	19	2	0
Race	89	10	0	18	2	0

Timeliness

To run a Timeliness report, click the Timeliness icon.

The screenshot shows the CaseWorthy dashboard with a sidebar menu on the left and a main content area. The sidebar menu includes sections like Setup, Administration, Codes and Categories, and Reporting. The main content area displays several report categories with icons: CSBG / ROMA Compliance Reports, Veteran / HOPWA Reports, GW/CC Compliance Reports, and Data Quality Monitoring. The 'Timeliness' icon in the Data Quality Monitoring section is highlighted with a red box.

Enter a report begin and end date. Choose any organizations and programs. Click  **Report** when finished.



The screenshot shows the 'Timeliness Report' configuration window. At the top, there's a header bar with a back arrow and the title 'Timeliness Report'. Below this is a section for 'Save Report Parameters' with a dropdown menu, an 'Edit' button, and a 'Save' button. A descriptive text line states: 'This report provides the time taken between client enrollment and actual system input dates for programs.' The main configuration area contains four fields: 'Report Begin Date' with a calendar icon, 'Report End Date' with a calendar icon, 'Organization(s)' with radio buttons for 'All' (selected) and 'Some', and 'Program(s)' with radio buttons for 'All' (selected) and 'Some'. At the bottom right, there is a 'Report' button with a document icon and a 'Done' button with a checkmark icon. The 'Report' button is highlighted with a red rectangle.

The report displays in a new window.

Timeliness Report		
Run By aelason - CaseWorthy on 12/22/2014 11:12:57 AM		
Report Period.....	12/1/2014 - 12/22/2014	
Program.....	All Programs	
Organization(s).....	All Orgs	

	Enrollments (Count)	Input Period (Avg)
Aggregate Statistics	146	0.00

Average Days Taken to Input Enrollments		
Program Name	Total Enrollments ↓	Average Days to Input ↓
Isample 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.

The screenshot shows the CaseWorthy dashboard with a sidebar menu on the left. The main area displays several report categories: CSBG / ROMA Compliance Reports, Veteran /HOPWA Reports, GW/CC Compliance Reports, and Data Quality Monitoring. In the Data Quality Monitoring section, the '2014 HMIS DQ' icon is highlighted with a red rectangle.

Enter a begin and end date. Choose any organizations or programs. Click  when finished.

... Data Quality Report - HUD HMIS 2014 Data Standards

Save Report Parameters

⚠ This report provides the percentage of clients with unknown and or missing data elements.

Begin Date *

End Date *

Organization(s) * ☒ All ☐ Some

Program(s) * ☒ All ☐ Some

The report displays in a new window.

Data Quality Report

Run By aetlason - 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

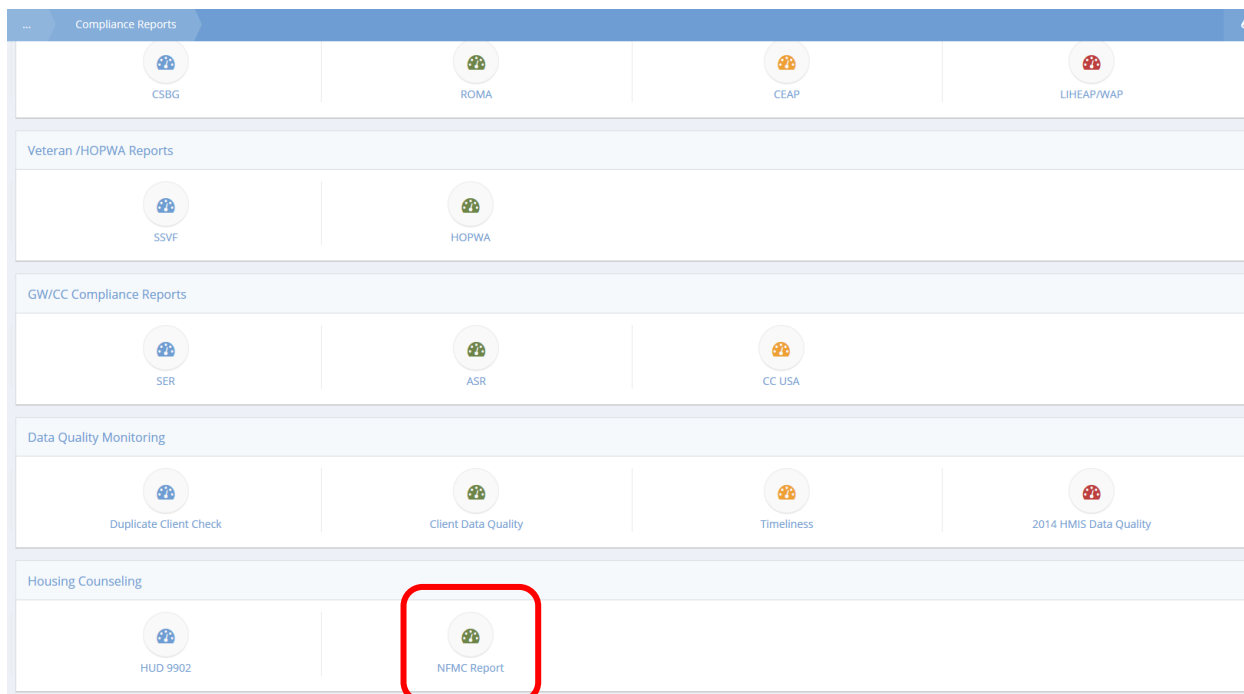
Program Type	Total Count			
Distinct Clients	922			
Universal Data Element	Don't Know Or Refused		Missing	
	Count	Percent of Total	Count	Percent of Total
First Name	1	0.1%	0	0.0%
Last Name	0	0.0%	0	0.0%
SSN	137	14.9%	76	8.2%
Date of Birth	27	2.9%	17	1.8%
Ethnicity	172	18.7%	29	3.1%
Race	89	9.7%	33	3.6%
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%

Program-Specific Data Element	Don't Know Or Refused		Missing	
	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%

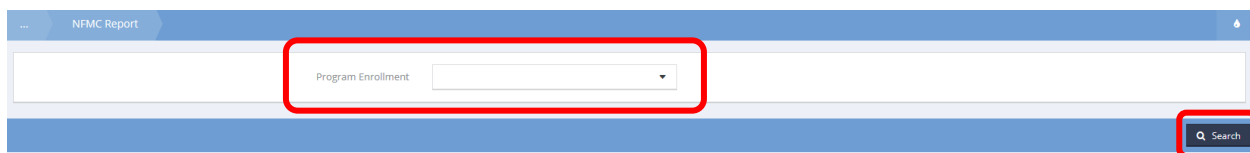
NFMC Report


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  button.

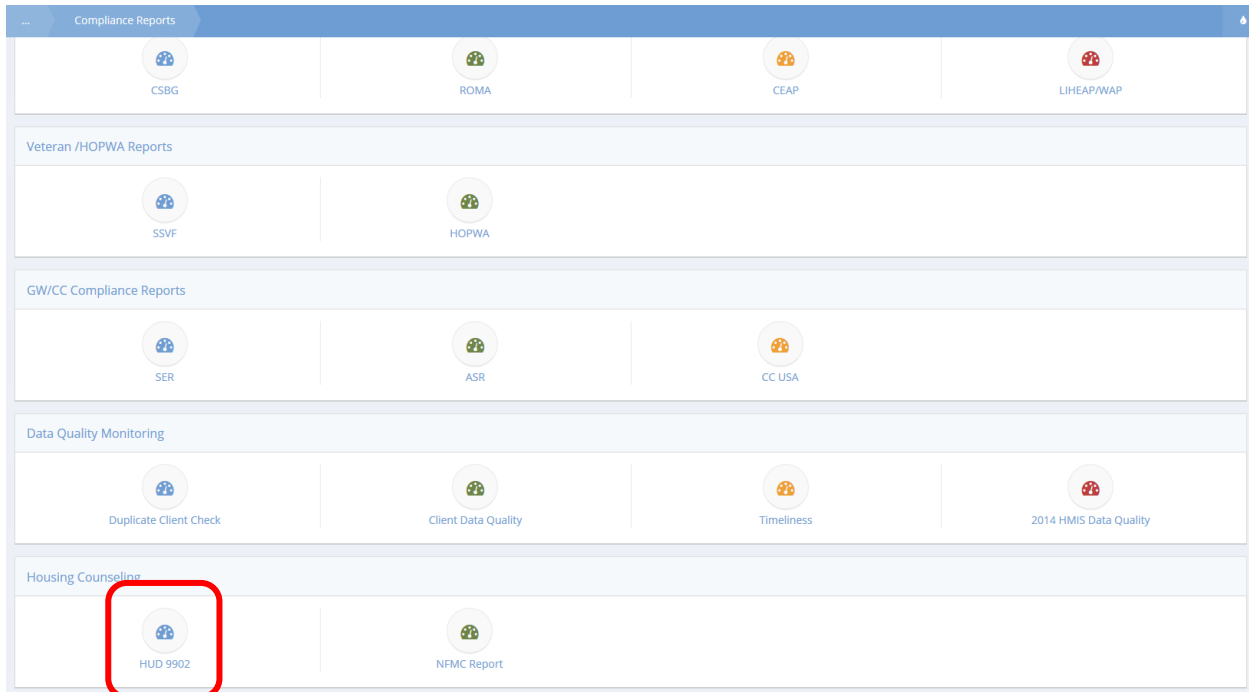
All relevant clients display in the list below the header.

NPMC Report																			
Program Enrollment																			
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 Insured Loan	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.


The screenshot shows the 'HCS 9902 Report Summary' form. It includes a table with report data and an '+ Add New' button highlighted with a red box.





Description	Start Date	End Date	Reporting Month	Report Period	Agency Provider	HCS Report ID
TEST	1/1/1950	12/20/2015	January	Quarter 2	CaseWorthy	3
Test 1	8/1/2015	8/31/2015	January	Quarter 3	CCA	2

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.

HCS 9902 Report Summary							+ Add New
Description	Start Date	End Date	Reporting Month	Report Period	Agency Provider	HCS Report ID	
  Edit	1/1/1950	12/20/2015	January	Quarter 2	CaseWorthy	3	
  Report	8/1/2015	8/31/2015	January	Quarter 3	CCA	2	

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.

HCS 9902 Report Summary							
Description	Start Date	End Date	Reporting Month	Report Period	Agency Provider	HCS Report ID	
 Edit	1/1/1950	12/20/2015	January	Quarter 2	CaseWorthy	3	
 Report	8/1/2015	8/31/2015	January	Quarter 3	CCA	2	

The Report displays in a new window.

CaseWorthy Report Viewer - Mozilla Firefox

dev.caseworthy.com/CaseWorthy/ReportViewer.aspx?FormID=8472&HCSReport.Description=TEST&HCSReport.StartDate=2015-10-07&HCSReport.EndDate=2015-10-07

1 of 3

Find | Next


HUD 9022 Housing Counselor Data Quality

Run By dseay - CaseWorthy on 10/7/2015 10:52:10 AM

Report Period..... 1/1/1950 - 12/20/2015

Program(s)..... Adult Education, St. Patricks Ce

Organization(s)..... CaseWorthy, Kingswood CAP, Head




	Missing
<u>Agency Data Elements</u>	Count
Agency Physical Address Line 1	0
Agency Physical Address City	0
Agency Physical Address State	0
Agency Physical Address Zip Code	0
Agency's Office Phone Number	0
Agency Languages	0
Agency Counseling Methods	0
Agency Contact Type: Senior Executive	1
Agency Contact Type: Manager	1
Agency Contact Type: HUD Use Contact	0
	Missing
<u>Counselor Profile Data Elements</u>	Count
Counselor First Name	1
Counselor Last Name	1
Counselor Employment Start Date	23
Counselor SSN	11
	Missing

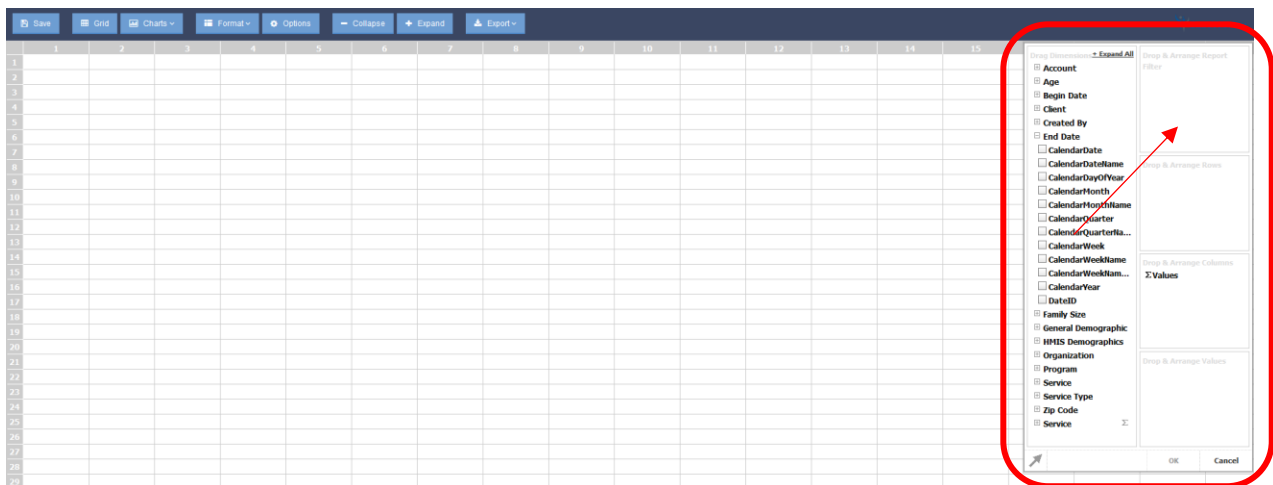
CaseWorthy Analytics

(Administration>Reporting>Available Cubes)

The Cube Analysis form displays.

Cube Analysis						
+ New Cube						
Cube Name	Created Date and Time	Last Processed Date and Time	Cube Deployed	Created By	Errors	Cube ID
Services	11/4/2013 12:00:00 AM	6/17/2015 3:01:00 AM	Yes	Administrator		100
Enrollments	11/4/2013 12:00:00 AM	6/17/2015 3:00:00 AM	Yes	Administrator		101
Housing	11/4/2013 12:00:00 AM	6/17/2015 3:00:00 AM	Yes	Administrator		102
Provider Referrals	11/4/2013 12:00:00 AM	6/17/2015 3:01:00 AM	Yes	Administrator		103
Cube Development	11/4/2013 12:00:00 AM	6/17/2015 3:01:00 AM	Yes	Administrator		104
CaseWorthy Analytics	11/4/2013 12:00:00 AM	6/17/2015 3:00:00 AM	Yes	Administrator		105
VISPDAT	5/29/2014 12:00:00 AM	6/17/2015 3:02:00 AM	Yes	Administrator		106
Employment Placement	3/4/2015 11:09:00 AM	4/30/2015 3:00:00 AM	Yes	Administrator		110


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.

Prompt Dialog

Cube Analytic Name:


OK

Cancel

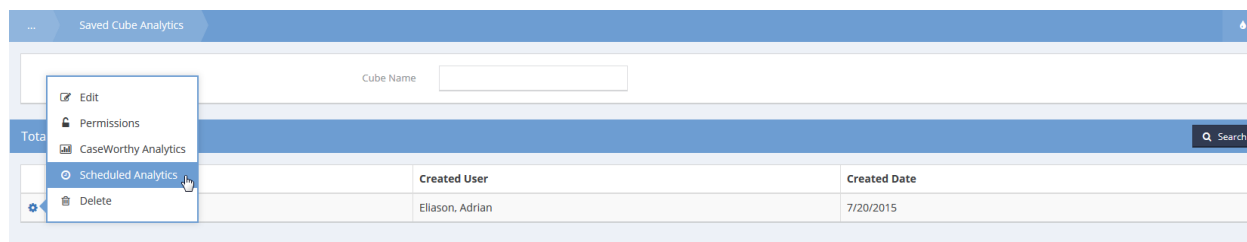
A dialog appears. Enter a name and click the  button. The cube now appears in the Saved Cube Analytics form.


Saved Cube Analytics

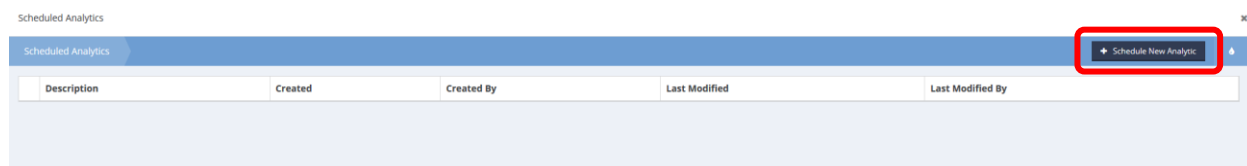
(Administration>Reporting>My Saved Cube Analytics)

Saved Cube Analytics		
Cube Name <input type="text"/>		
Total Rows: 1 Search		
Cube Name	Created User	Created Date
 testcube	Ellason, Adrian	7/20/2015

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.

Description *

Teams: Choose Options...

Email Template *

Format * PDF

Number To Keep * 5

Frequency and Scheduling Information

Frequency Type * Months

Frequency 1

Start Date * 07/20/2015

Start Time * 12 AM

End Date

Disable ☐

Save **Cancel**

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

Scheduled Analytics

Scheduled Analytics					Schedule New Analytic
	Created	Created By	Last Modified	Last Modified By	
 Edit  Delete	7/20/2015 11:38 AM	Adrian Eliason	7/20/2015 11:39 AM	Adrian Eliason	

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

Edit

Schedule Analytic

Description * test

Teams Choose Options...

Email Template * CIP Referral

Format * PDF

Number To Keep * 5

Frequency and Scheduling Information

Frequency Type * Months

Frequency 1


Start Date * 07/20/2015

Start Time * 12 AM

End Date Open

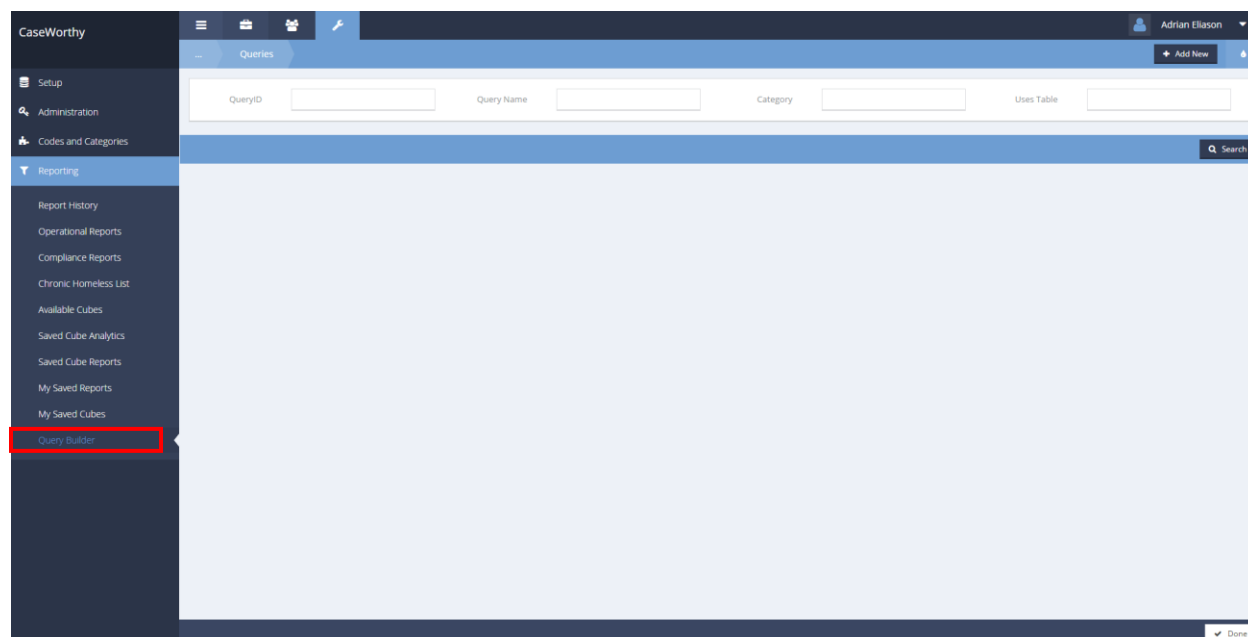
Disable

Disable

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.

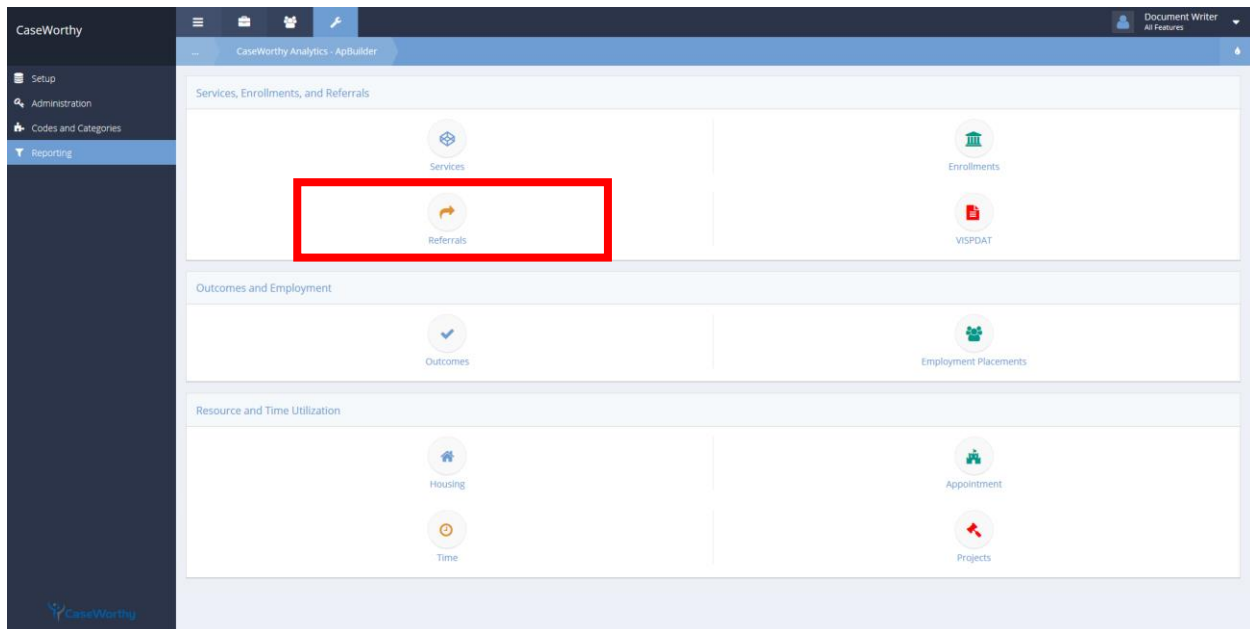
Using the Query Builder is not the most effective or efficient means for generating reports, but can come in handy to view a quick snap-shot of specified data.

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.

Referral Cube Powered by CaseWorthy ApBuilder

Referral Date 08/02/2016 through 08/02/2016

Search

Save Views Grid Charts Format Options Collapse Expand Export

	1	2	3	4	5	6	7	8	9	10
1	Grand Total									
2										
3										
4										
5										
6										
7										
8										
9										
10										
11										
12										
13										
14										
15										
16										
17										
18										
19										
20										
21										

Drag Dimensions

Drop & Arrange Report Filter

Drop & Arrange Rows

Drop & Arrange Columns

Values

Drop & Arrange Values

Add calculated value

OK Cancel

Done

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.

CaseWorthy

Report History Summary

Report Name

Total Rows: 1000 **Search**

Report Run Date	Report Name	User Name
12/31/2014 10:49 AM	Authorization Service Request (summary)	Seay, Test
12/31/2014 10:41 AM	Project Time Entry (Spreadsheet)	Knudtson, Eric
12/31/2014 10:34 AM	User Project Time (Summary)	Knudtson, Eric
12/31/2014 10:34 AM	Project Time Entry (Spreadsheet)	Knudtson, Eric
12/31/2014 10:34 AM	Project Time Entry (Spreadsheet)	Knudtson, Eric
12/31/2014 10:24 AM	HMISAPR_v5	Abbott, Andrew
12/31/2014 10:24 AM	DATA v6	Abbott, Andrew

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.

Client in Chronic Programs

Default Values **Edit** **Save**

Date *

Program

Chronic ☐

Provider

Status

Event Type

Search

Done

The list displays in the space below.

... Client In Chronic Programs

Default Values
Edit Save

Date * 12/01/2014

Program

Chronic

Provider

Status

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