Revolutionizing Human Services Software

User Guide

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General Information

Supported Operating Systems and System Requirements

The following items describe the system requirements for release versions 4.x and higher.

Supported Operating Systems

The supported operating systems for installing the product are:

- Windows Vista: 32-bit and 64-bit: Starter, Home Basic, Home Premium, Business, Ultimate, Enterprise
- Windows 7: 32-bit and 64-bit: Starter, Home Basic, Home Premium, Business, Ultimate, Enterprise
- Windows 8 and 8.1: 32-bit and 64-bit; Starter, Pro, Enterprise
- Windows 10: 64-bit all releases
- iPad Tablet: iOS 6
- Self-Hosted Servers: Windows 2008 R2 (Minimum)
  Windows Server 2012 (Recommended)

System Hardware Requirements

Minimum (Windows 7, Vista, 8 or 8.1)

Processor: Capable of running Microsoft Windows 7, 32bit

- Memory: 1GB
- Operating System: Microsoft Windows 8 or 8.1 RTM versions
- Disk space: 600MB free HD space (300 MB for Anti-virus only)
- Display: Min. 8-bit (256 colors)
- Internet Connection: An Internet connection is required

Recommended (Windows 7, Vista, 8 or 8.1)

- Processor: Intel Pentium 4 2GHz or higher
- Memory: 2GB or more
- Disk space: 800MB free HD space (500 MB for Anti-virus only)
- Display: 16-bit or more (65000 colors)
- Internet Connection: An Internet connection is required to validate the current subscription and receive updates

Recommended Browsers

- Browser on PC: Mozilla Firefox 3.6.10+, Chrome (latest version), IE 9+
- iPad Tablet: Safari or Chrome
- Android Tablet: Chrome

Software requirements

Recommended Software Versions

- MS Office: To export to Excel, Excel 97 or newer.

  To use Cubes functionality, MS Office 2010 or newer.

  To use Cubes functionality with Power View Ad Hoc Reporting, MS Office 2013.

- SQL Server (Only required for Self-Hosting): SQL Server 2012

Internet Connectivity requirements

Minimum

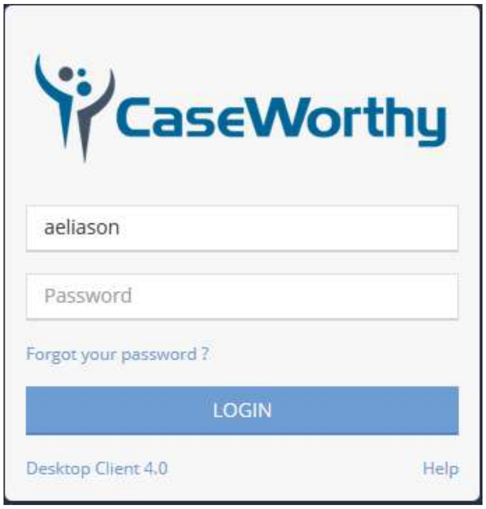
- DSL

Recommended

- High Speed Internet

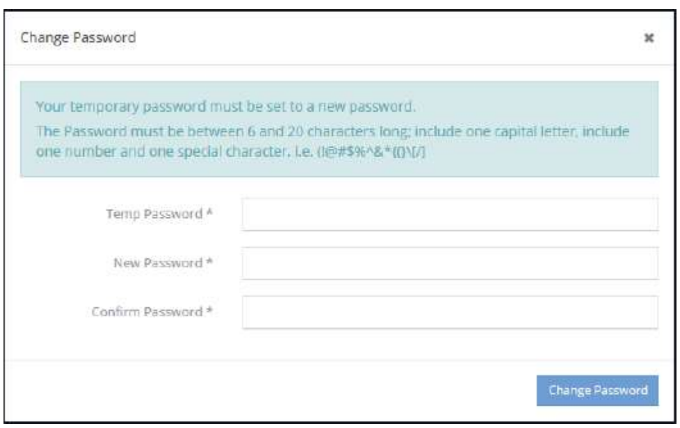
General Navigation

Logging in to CaseWorthy™



Enter the username and password provided by a CaseWorthy™ administrator. The username is not case sensitive, but the password is.

If logging in for the first time, the system prompts the user to create a new password in the following pop-up screen.

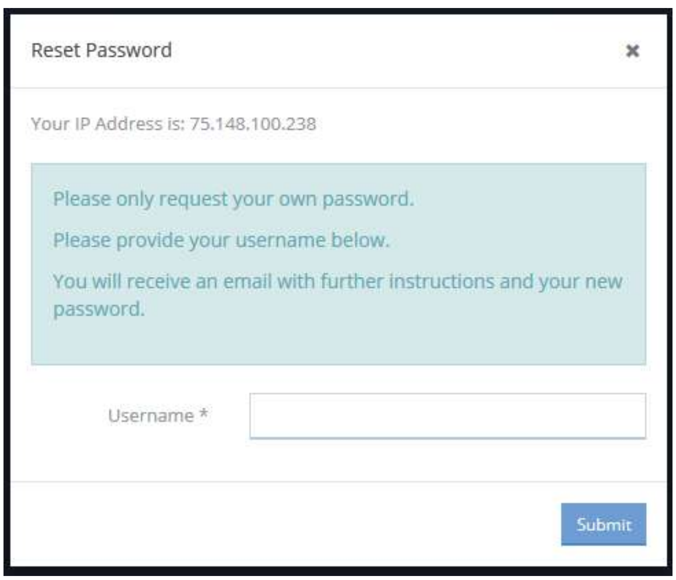


Enter the password provided by the administrator then create a new password following the password standards; passwords are case sensitive, must be between six and 20 characters in length, include one capital letter, one number and one special character, i.e. !@#$%^&*()[]{}/\. Once the new password is created, the system prompts the user to login with the newly created password.

CaseWorthy™ can be configured such that System Administrators determine the number of Failed Login Attempts a user is allowed before the user is locked out of the system. The product is shipped with a default to 3. To regain access after a lock, wait 30 minutes and try again or contact the System Administrator to unlock the access and reset the password.

If a user does experience trouble logging in, the Forgot Password feature allows them to have a new temporary password emailed to them.

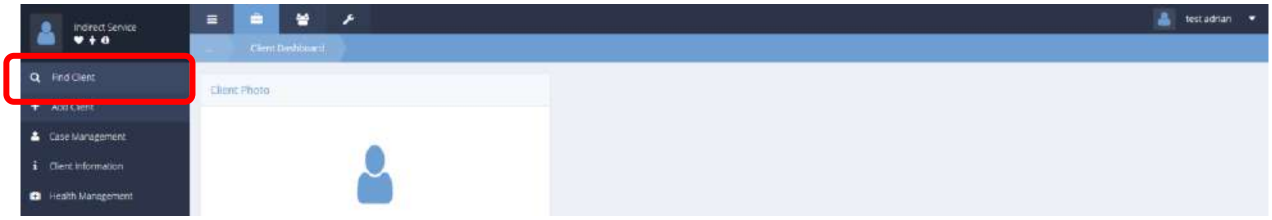
To utilize this feature, click the Forgot your password ? link. A pop up window displays. Enter the username in the space provided.



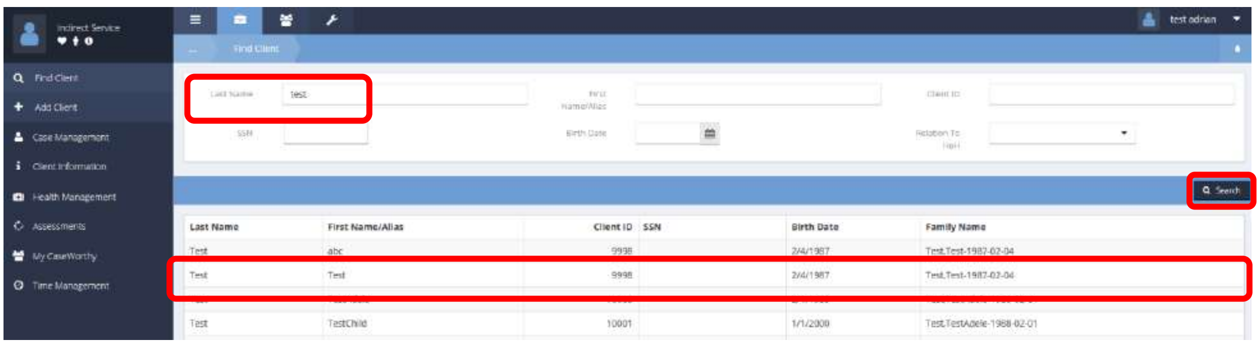
Once the email has been received, enter the temporary password and click on the LOGIN button. The system then requires the user to re-enter the temporary password and create a new, permanent password as described above.

The CaseWorthy™ Login page also includes a Help link. If the user experiences difficulties logging in, clicking the link displays a message created by the System Administrator that provides directions on how to address issues and/or contact someone for assistance.

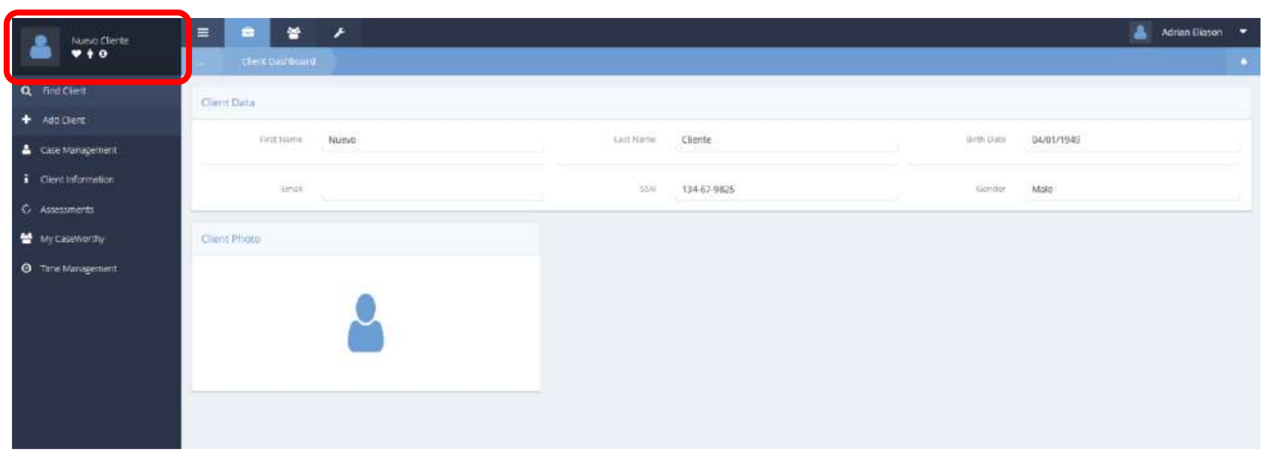
The system opens to a "limited access" screen the first time a new user logs in.



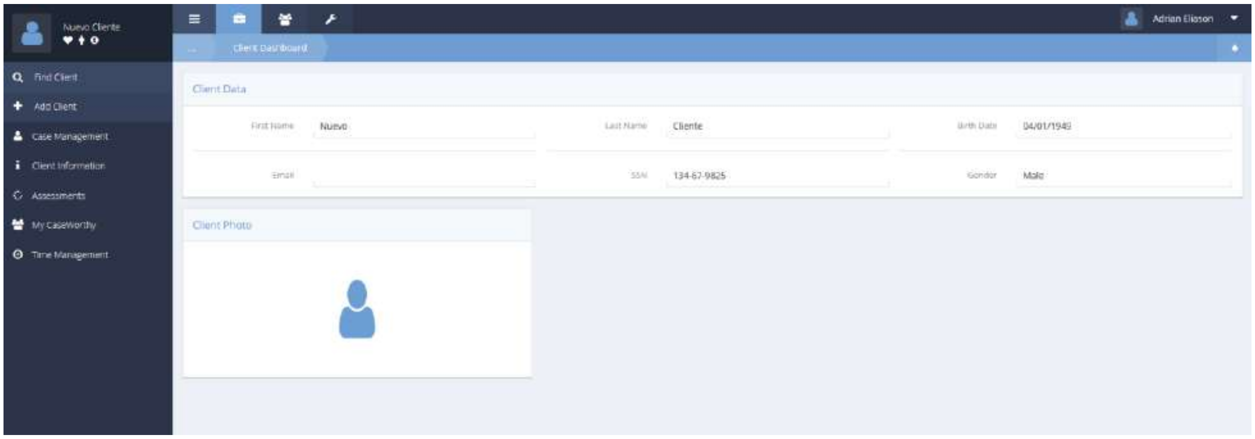
To open the system and view client records, click the Find Client button and use the search form that is presented to find the desired client record. All records matching the criteria entered into the search form displays. Click on the row of the desired record.



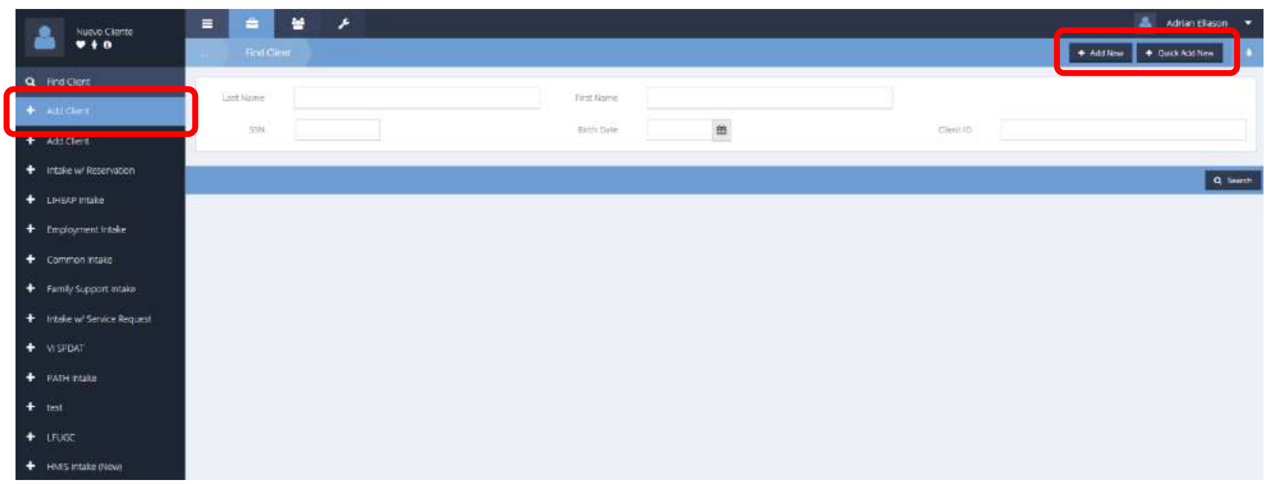
If there is only 1 record in the system matching the search criteria, it automatically selects and displays.



If the user has logged in previously, CaseWorthy™ opens to the following screen, displaying the active client record from the last session.



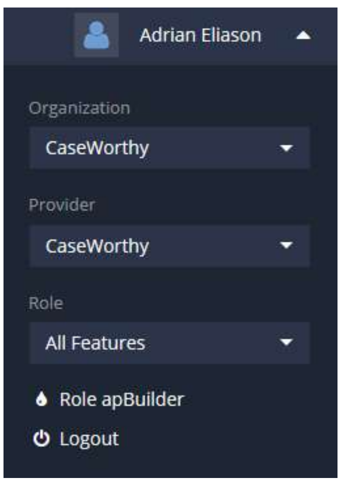
The + Add Client button can also be used to launch Intake Workflows.



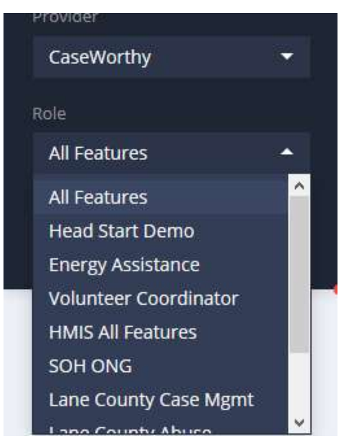
Login Settings

The user name appears in the top right-hand corner of the screen. Click the drop-down arrow  icon next to it. The field expands to include the current organization, provider, user role, and the 

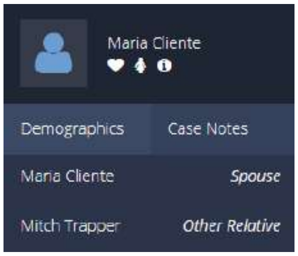
button.



If the user is associated with multiple Providers, Organizations, or has multiple Roles within CaseWorthy™, the user can toggle between them by clicking on the drop-down arrow  icons for each.



Client Details

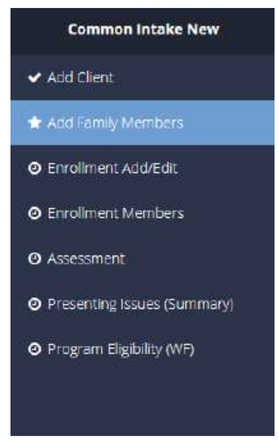


After clicking the client's picture next to their name, the field expands with additional family info. The icons below the client's name indicate date of birth, gender, and ID number. The description to the right of household members indicates their status. By clicking on the client photo in the top left corner, quickly navigate between members of the same Family. Also, quickly link to either the client's demographic page or case notes by clicking one of those options.

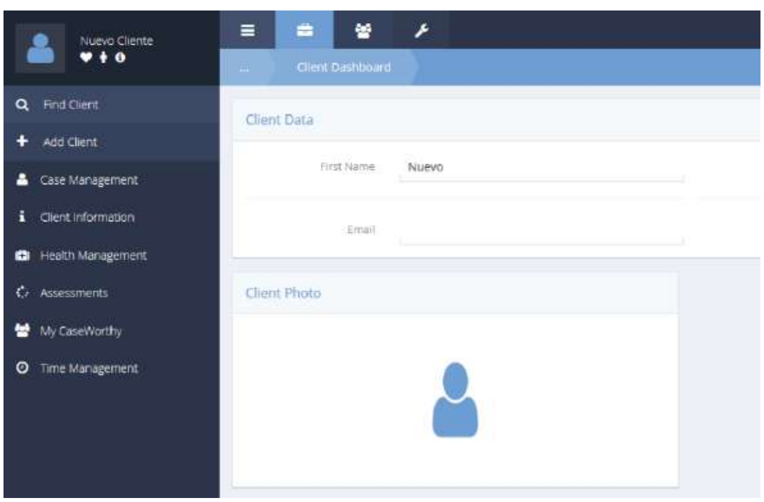
Introduction to Workflows

Workflows are used throughout the system to carry the user smoothly through a specific process by automating the progression of work. Workflows are generally used for Intake, Retention and Exit procedures. Workflows are customized to the role of the user and the program the user works in; calling the forms that are necessary to complete within that context.

Once a workflow has been initiated, the necessary forms appear in a pop-up window and flow, in order, so that as the user completes and saves each screen, the next screen appears.



The left side bar of the workflow pop-up window indicates the user's progress within the workflow. A checkmark signifies the form has been completed. A star shows the current form. A clock indicates remaining forms.
It is very important to follow the entire workflow to the end. Navigating away from the workflow, by clicking on anything other than the forms presented can lead to lost data and system errors.



On the main navigation area of the system, in the top portion of the screen, the icon for Case Management is highlighted since it's the open tab. Click the icons for Organization and Administration navigates to the respective tabs.

Functionality Covered in Stand-Alone Manuals

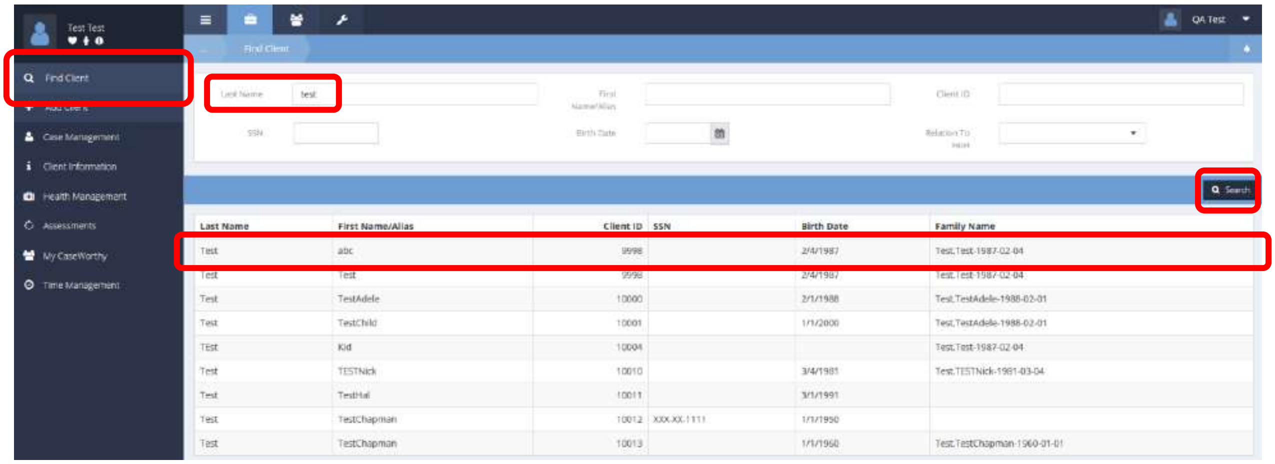
Some areas of functionality are large enough to require their own stand-alone document. They are listed here. Ask your CaseWorthy representative for access to these stand-alone docs.

- Alert Configuration
- Application Settings
- CaseWorthy API
- CSV Export
- Dashboard apBuilder
- Encrypted Email and Fax
- Enhanced Org Group Sharing
- Foster Care
- Grant Management
- Head Start
- Hierarchy Security
- Job Match
- Portal Functionality
- Query apBuilder
- Role apBuilder
- Service Requests
- Signature Pad Functionality
- Support Portal
- Volunteer Functionality
- Work Therapy Functionality
- Workflow apBuilder

Case Management

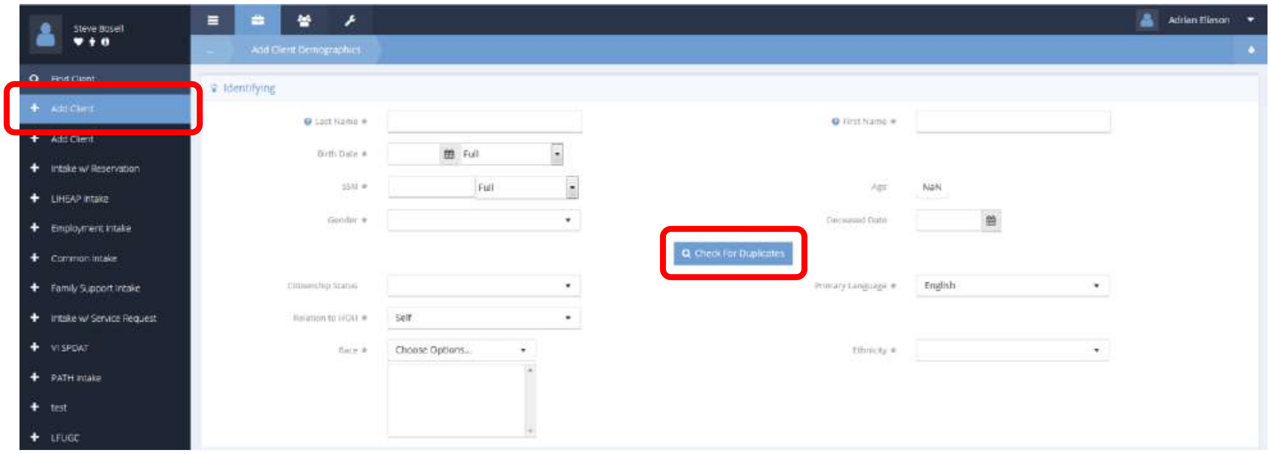
Find Client

Click the Find Client button and use the search form that is presented to find the desired client record. Enter full or partial information into any or all of the search fields. All records matching the criteria entered display. Click on the row of the desired record. If there is only one record in the system matching the search criteria, it automatically displays.

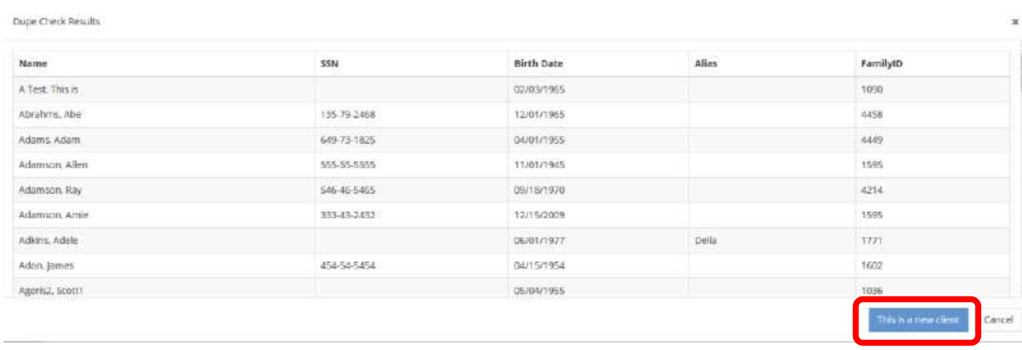


Add Client

Click the Add Client button. An asterisk next to a field denotes that a field is required. An unfilled required field causes a warning to appear and the save function to abort. The drop-down boxes next to the Birth Date and SSN fields allow the user to enter partial data or indicate the client does not know or chooses not to share the information.

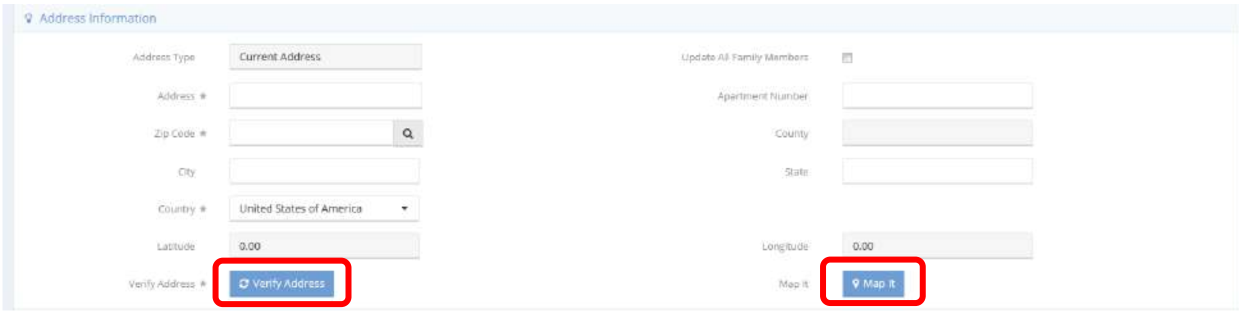


Enter some or all of the data above the **Check For Duplicates** button and click on it. The system searches the database to determine if the client already exits. If so, the client displays in the search results in a pop-up window and can be selected by clicking on the name. This fills the form with the client data already entered in the system.



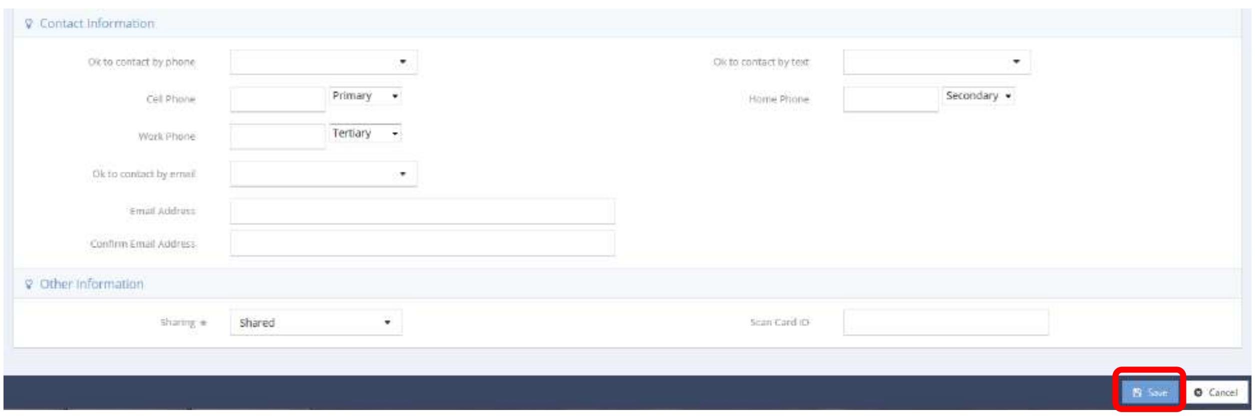
Name	SSN	Birth Date	Alias	FamilyID
A Test, This is		02/03/1965		1090
Abrahms, Abe	135-79-2468	12/01/1965		4458
Adams, Adam	649-73-1825	04/01/1955		4449
Adamson, Allen	555-55-5555	11/01/1945		1595
Adamson, Ray	546-46-5465	09/18/1970		4214
Adamson, Amie	333-43-2432	12/15/2009		1595
Adkins, Adele		06/01/1977	Della	1771
Adon, James	454-54-5454	04/15/1954		1602
Agoris2, Scott1		05/04/1955		1036

If the client does not currently exist in the system, click the This is a new client button and continue entering relevant and required data.



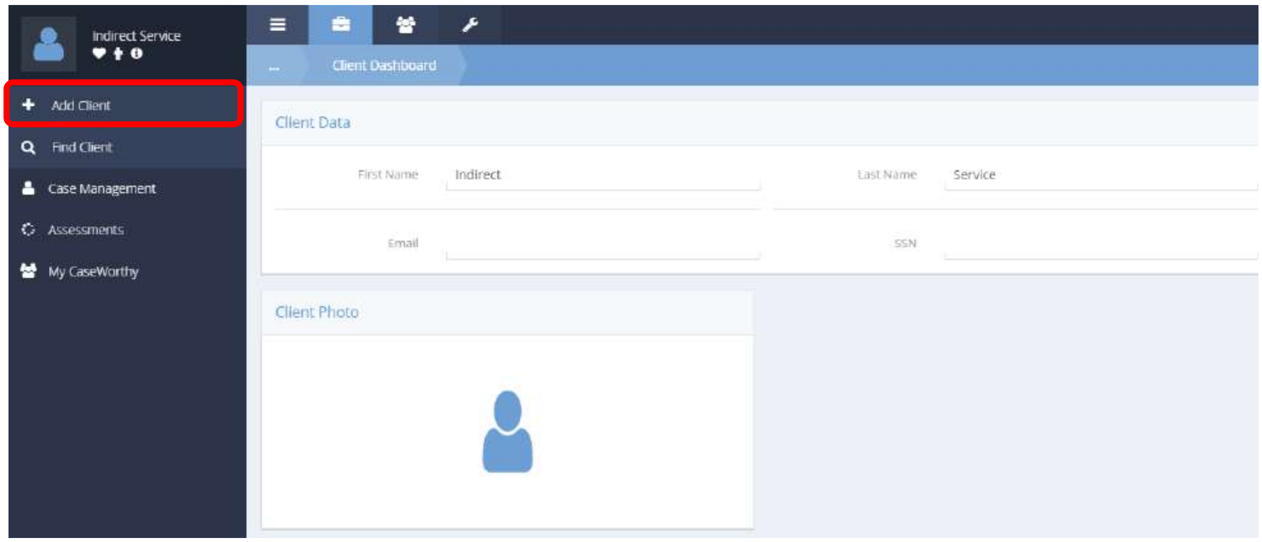
To pinpoint an address and populate the longitude and latitude fields, click on the Verify Address button. To view the address on BING Maps, click on the Map It button.

Adding contact info is optional. Click Save when finished.



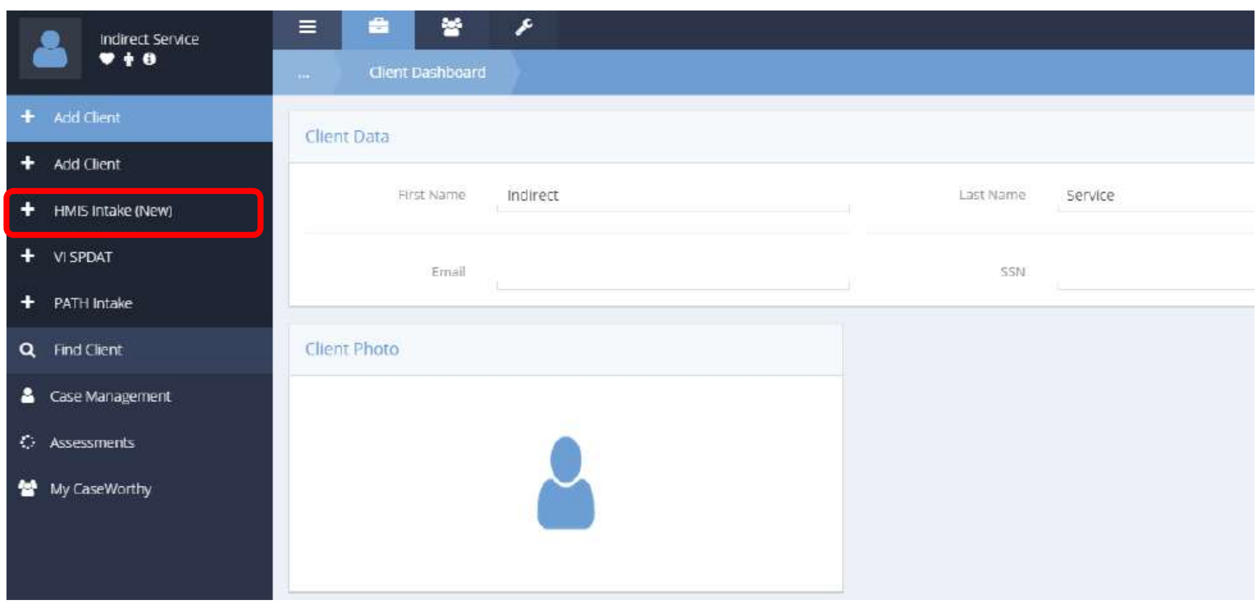
HMIS Add New Client

Under the HMIS All Features Role

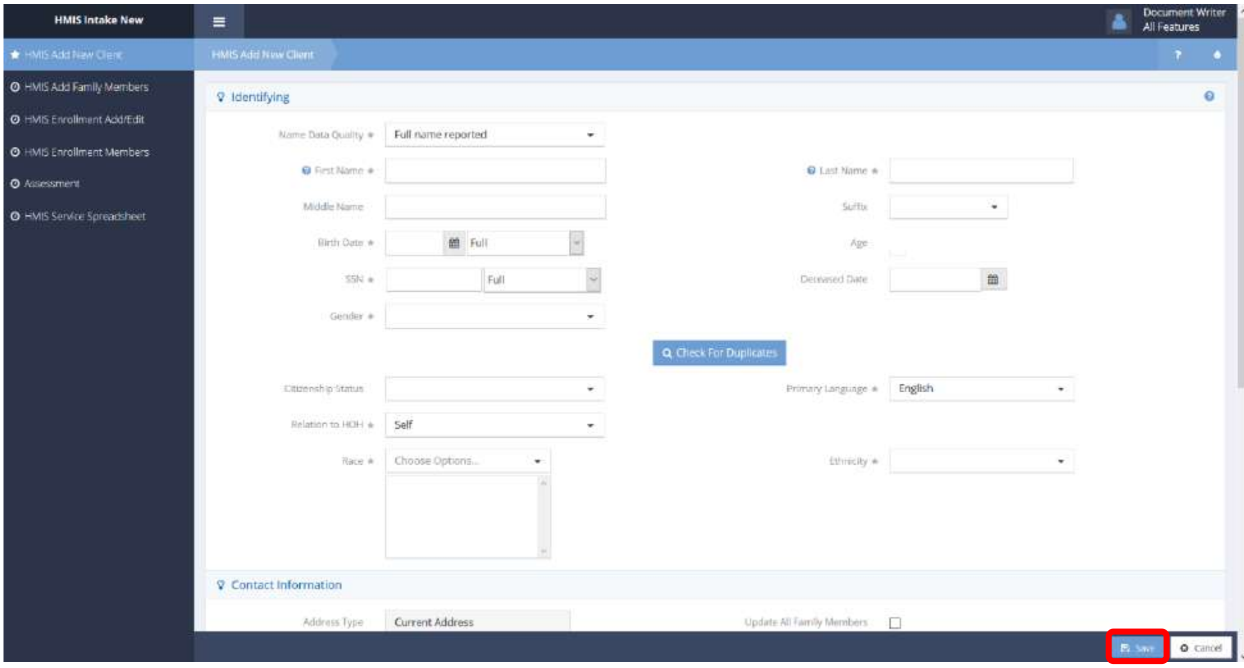


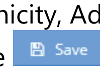
Click on the 

button in the navigation bar and select HMIS Intake from the pop up menu that appears.



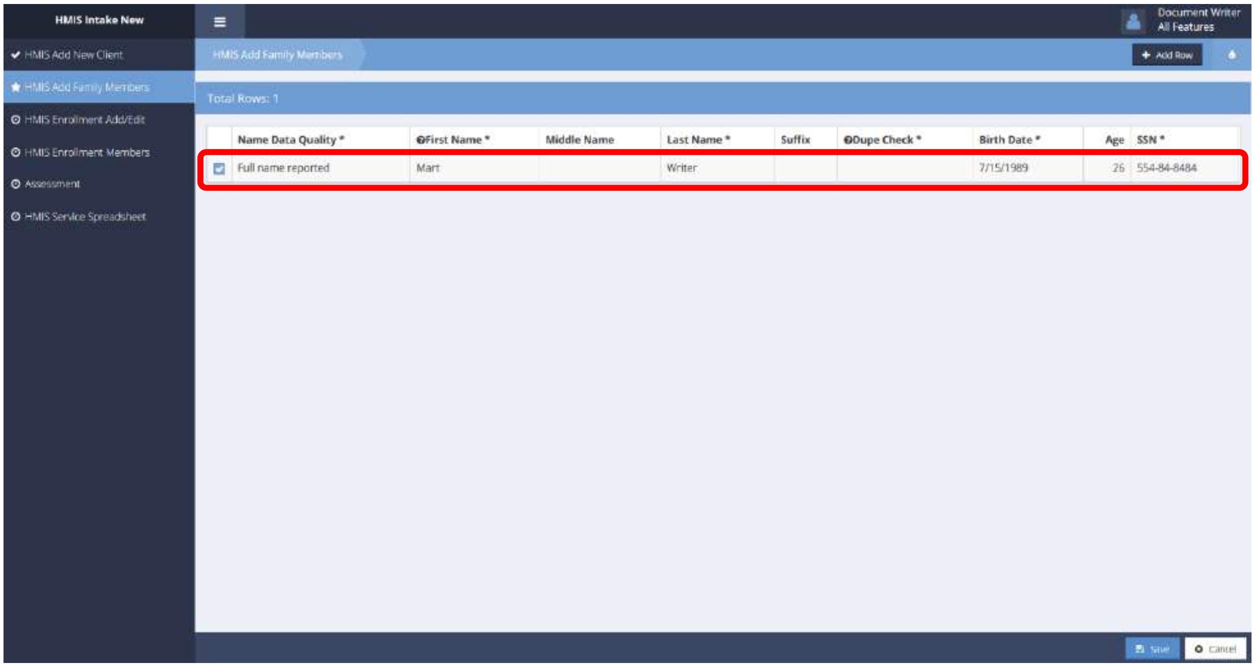
The HMIS Intake New workflow displays the HMIS Add New Client form.



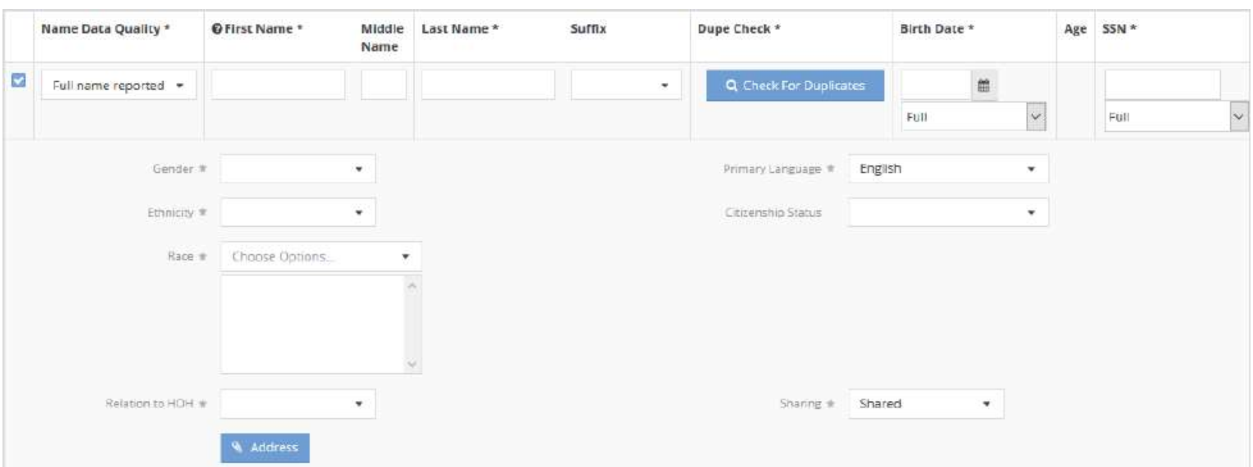
Enter information into required fields: Name Data Quality, First Name, Last Name, Birth Date, SSN, Gender, Check for Duplicates, Primary Language, Relation to HOH, Race, Ethnicity, Address, Zip Code, Country, Verify Address, and Sharing. Fill remaining fields as desired. Click the 

button to move on to the next step of the workflow.

The HMIS Add Family Members form displays.

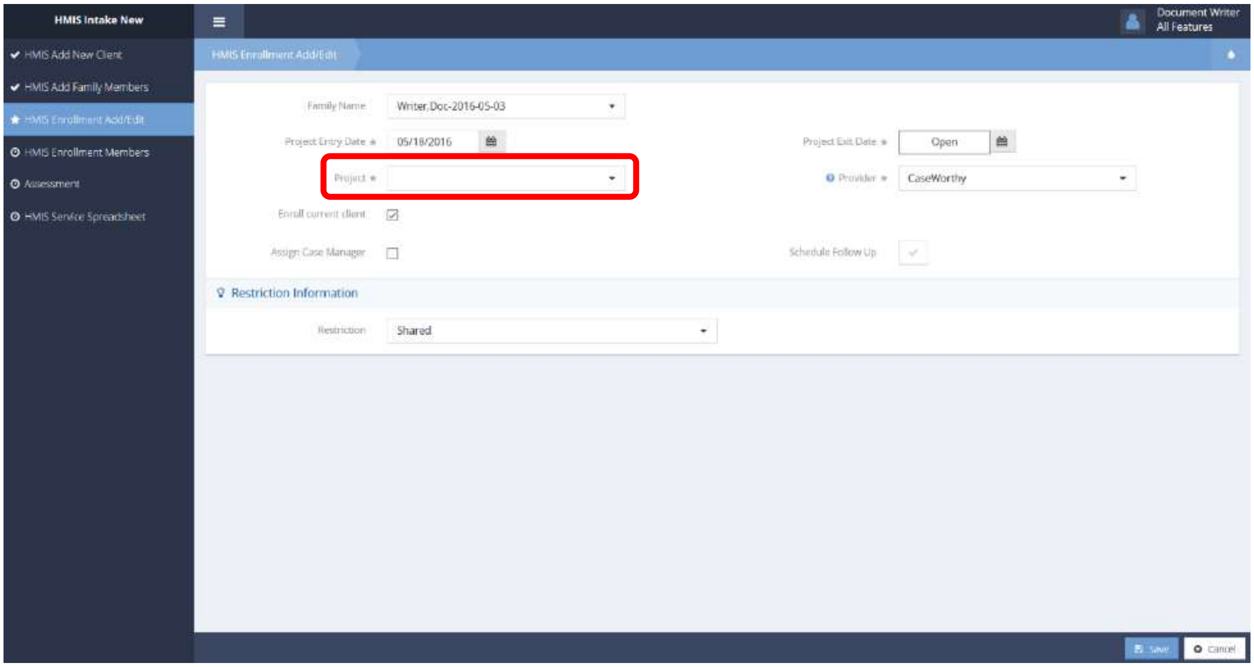


Existing family members display. Click on the + Add Row button to add family members. A new, expanded row appears.

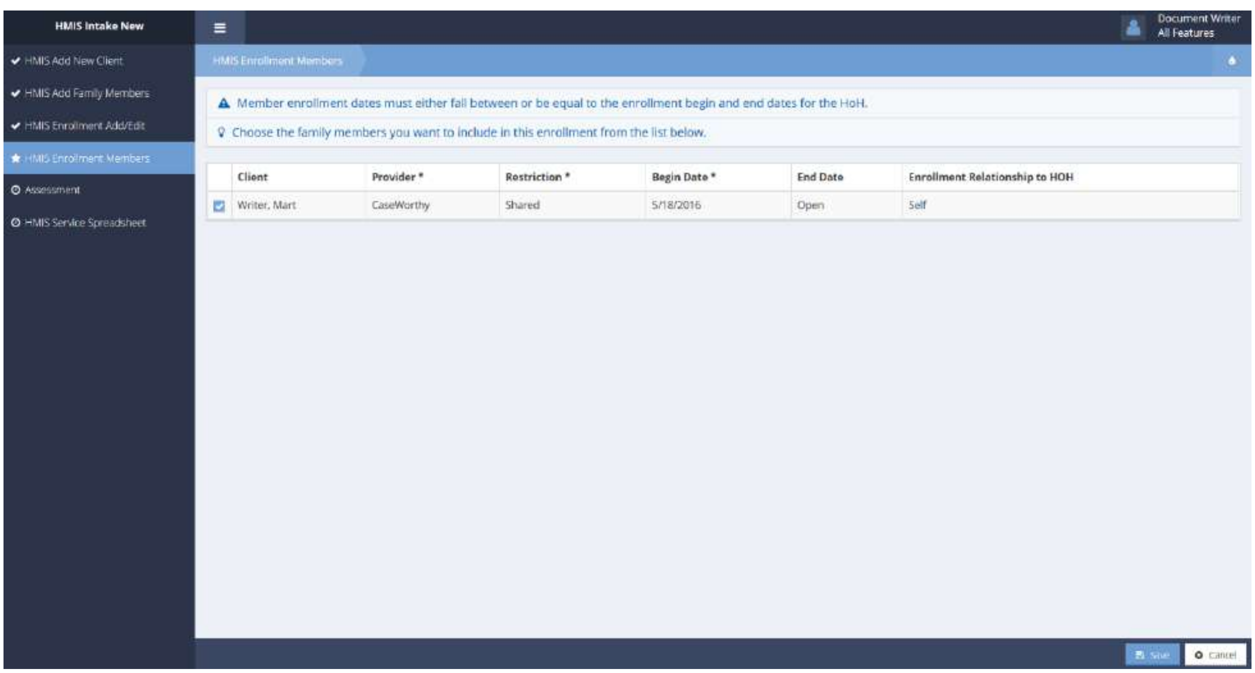


Enter information into required fields: Name Data Quality, First Name, Last Name, Check for Duplicates, Birth Date, SSN, Gender, Ethnicity, Race, Primary Language, Veteran Status (appears upon entering a birth date), Relation to HOH and Sharing. Fill remaining fields as desired. To continue adding family members, click the + Add Row button. Click the Save button to move on to the next step of the workflow.

The HMIS Enrollment Add/Edit form displays.



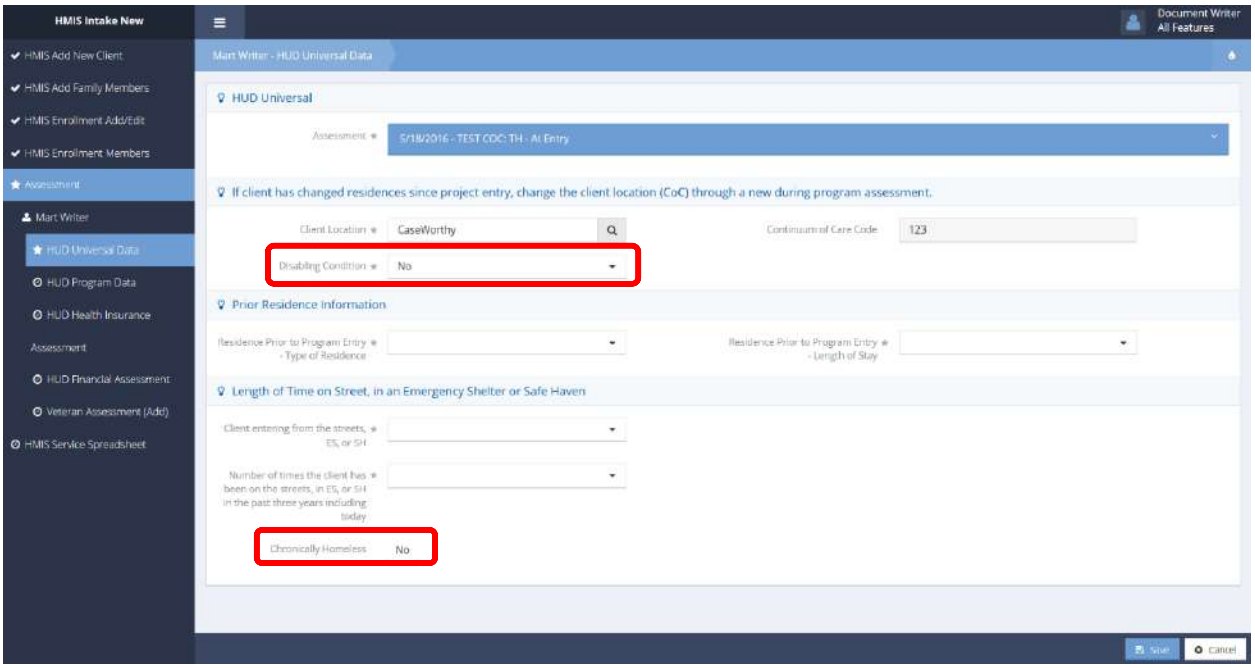
Adjust any of the pre-populated data fields if needed. Enter information into required fields: Project Entry Date, Project Exit Date, Project, and Provider. Fill remaining fields as desired. Click the Save button to continue. The HMIS Enrollment Members form displays.



Family members associated with the client (if applicable) display. Select family members as desired for enrollment by clicking the clear checkbox associated with their name. A blue checkbox indicates selection. Click either checkbox to view and edit client/family member details. Click the Save button to continue.

The HUD Universal Data assessment form for the first family member displays.

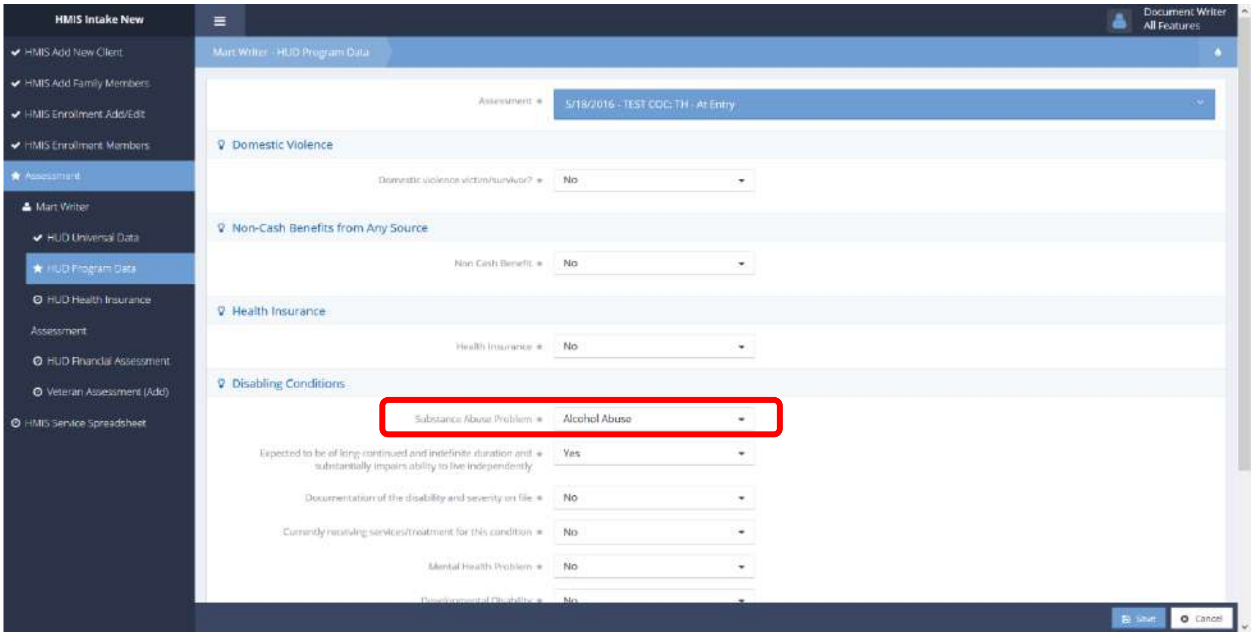
Note: ***This form only displays if associated with the program selected. Ensure the programs selected is associated with HUD Universal.***



Enter Information into required fields: Assessment, Client Location, Disability Condition, Residence Prior to Program Entry – Type of Residence, Residence Prior to Program Entry – Length of Stay, Client entering from the streets ES, or SH, and Number of times the client has been on the streets, in ES, or SH in the past three years including today. Click the Save button to continue.

Note: ***The new form, HUD Chronic Homeless Post Control, only displays if necessary. If both the Disabling Condition and Chronically Homeless fields contain "No" as the answer, the user is prompted in subsequent parts of the workflow with the HUD Chronic Homeless Post Control form. Obtaining these results is based on information entered into the other fields.***

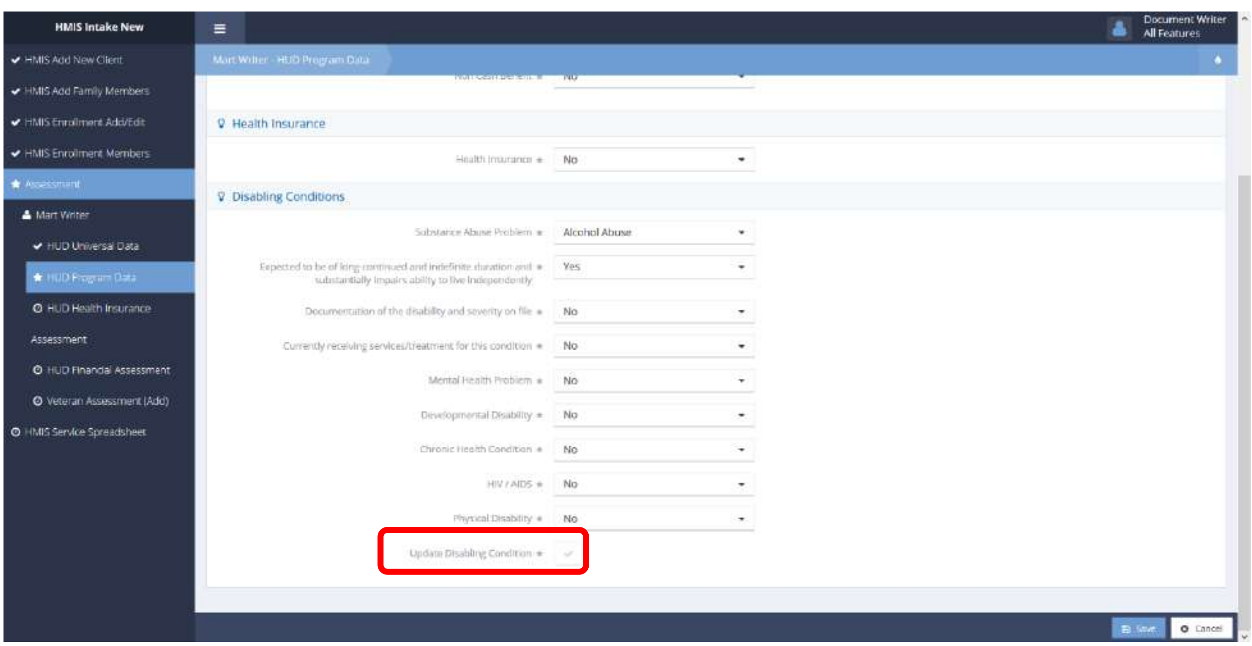
The HUD Program Data form Displays.



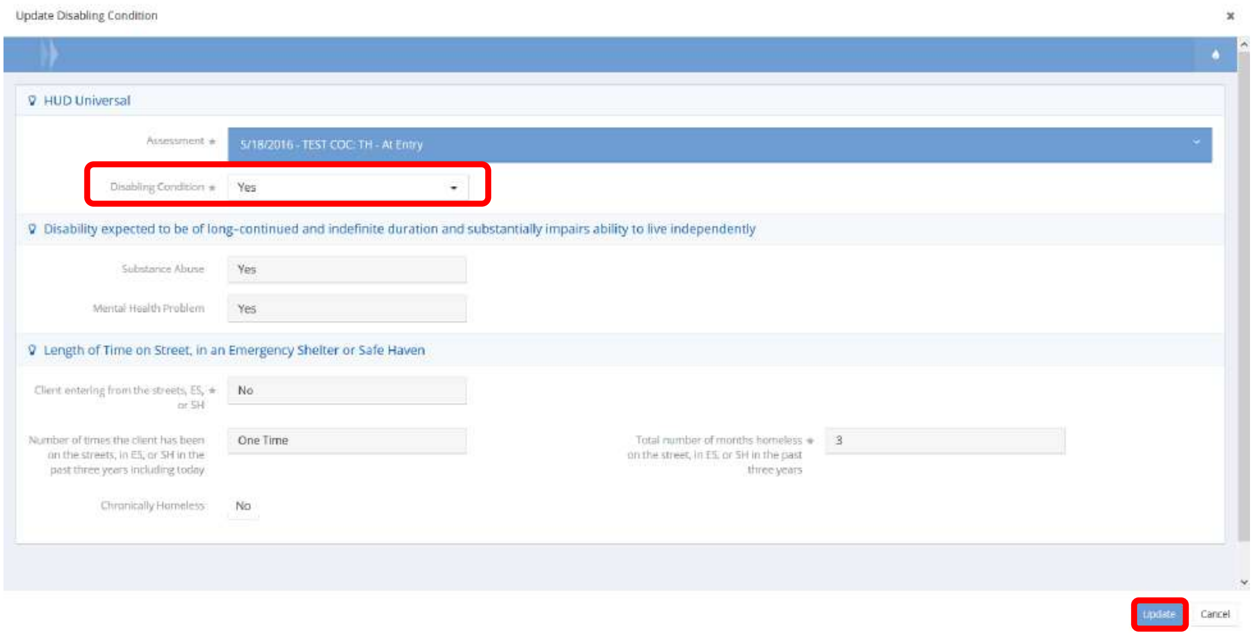
Enter information into all fields, as they are all required.

Note: ***The HUD Chronic Homeless Post Control form only displays if necessary. This occurs if at least one disabling condition is selected and the previous form requirements are met (see previous note).***

If a disabling condition is selected, a new field appears, suggesting the disabling condition needs to be updated. Click this box.

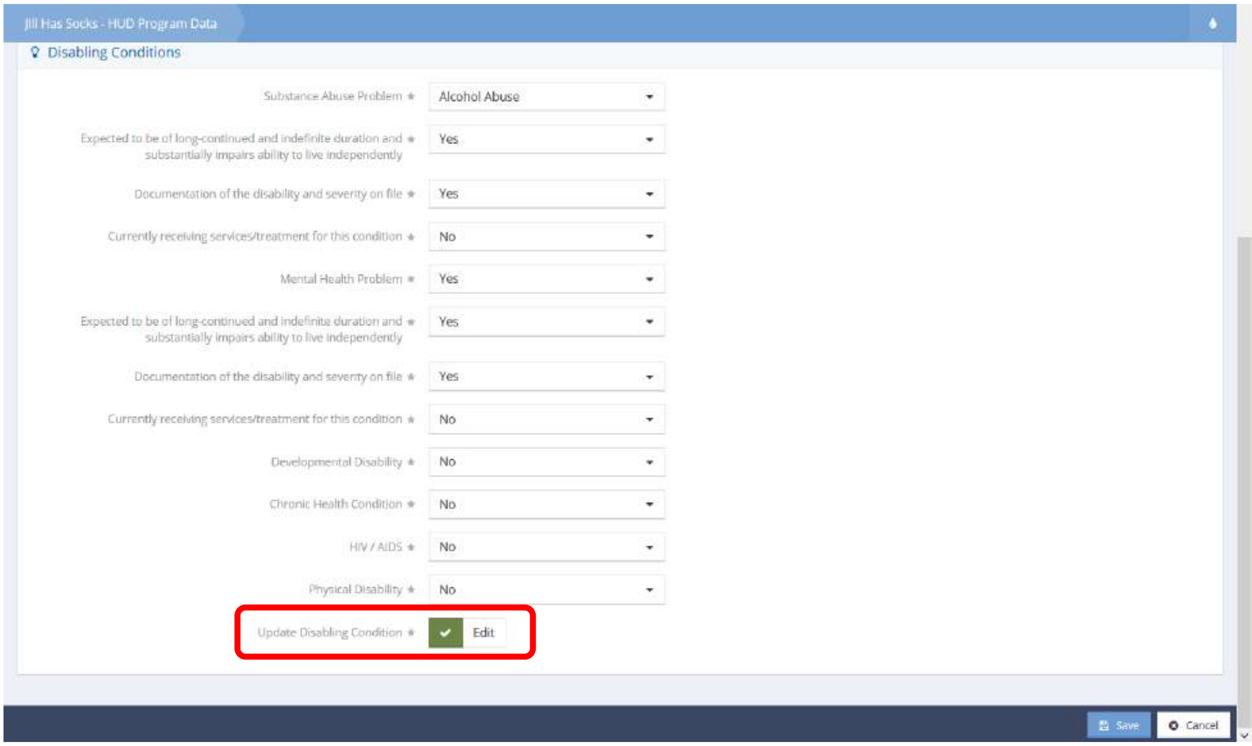


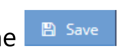
The HUD Chronic Homeless Post Control form displays.



This form displays because the Chronically Homeless status and disabling conditions outlined on the previous forms do not match. The system requires the user to acknowledge this mismatch. To override the disabling condition status, simply select "no" from the Disabling Condition drop-down menu. Make any necessary changes and click the Update button to continue and return to the workflow.

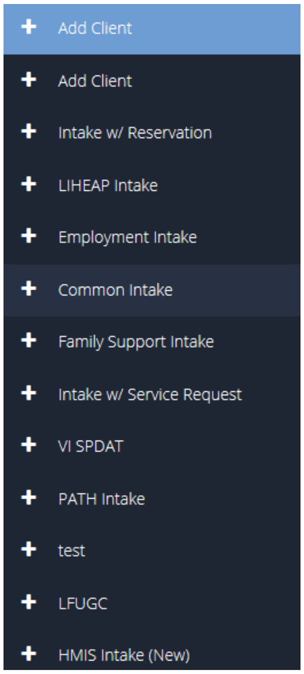
The HUD Program Data form displays once again.



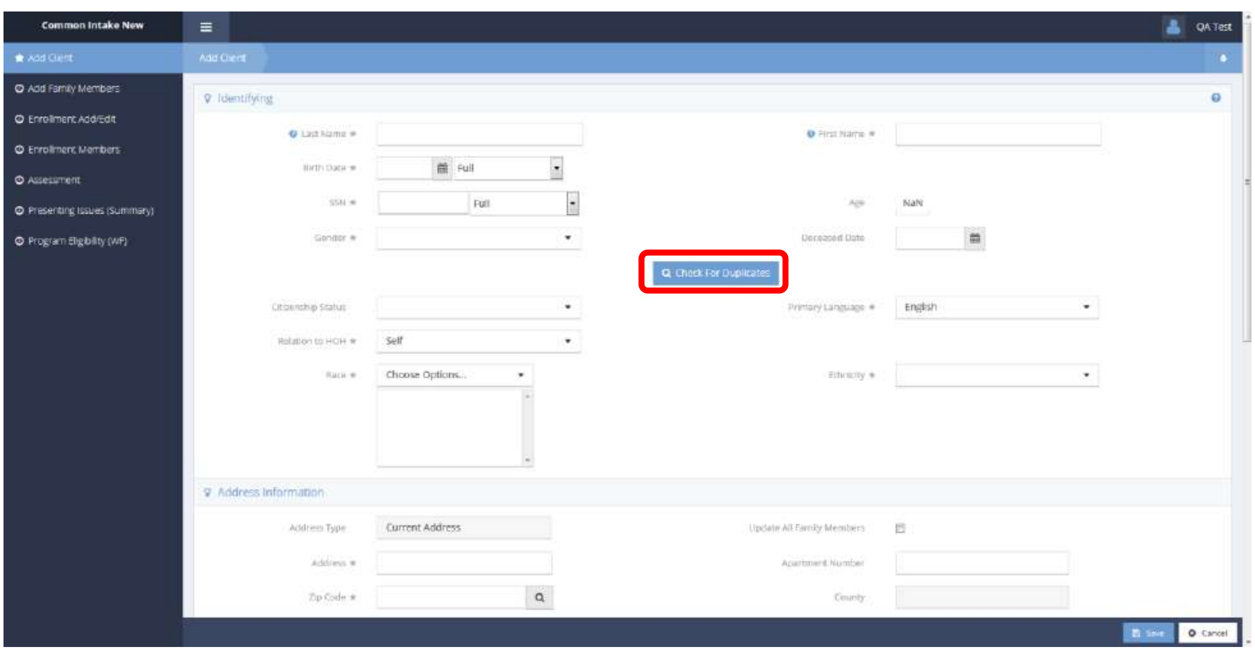
Edits can always be made to update the disabling condition from this workflow. Click the 

button to finish the remainder of the workflow.

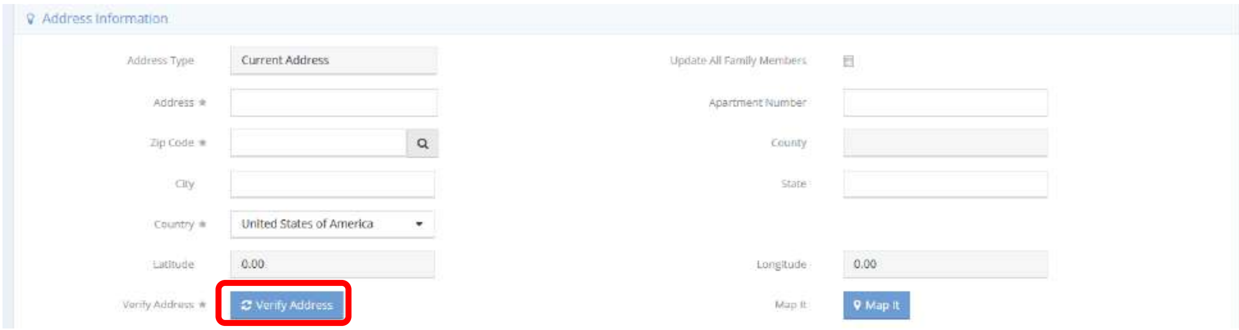
Common Intake Workflow



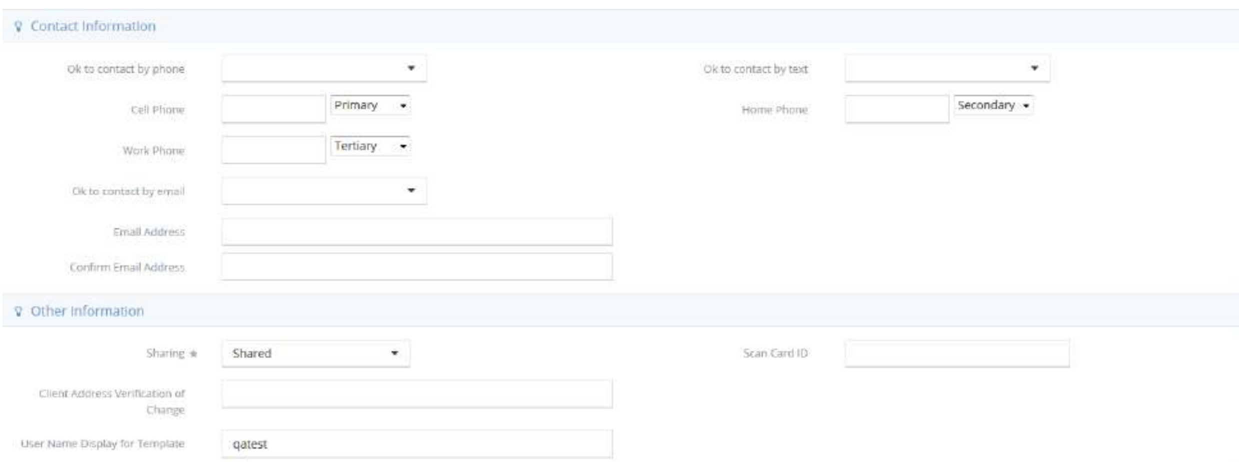
On the first step of the Common Intake Workflow, enter all required fields and click the Check For Duplicates button. Either select the desired existing client or click the This is a new client button.



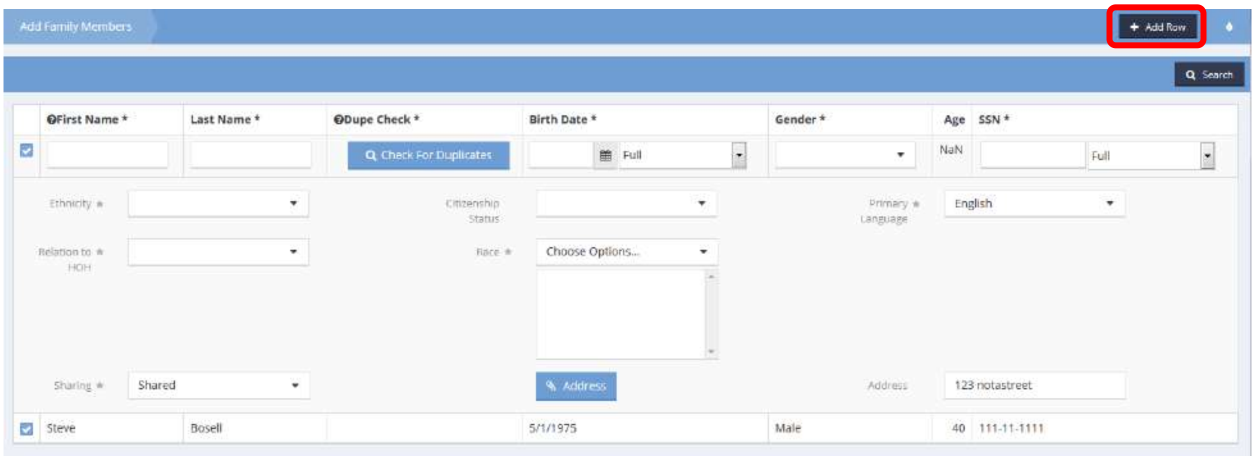
Proceed to enter an address and zip code. Click the Verify Address button and select the displayed address if correct.



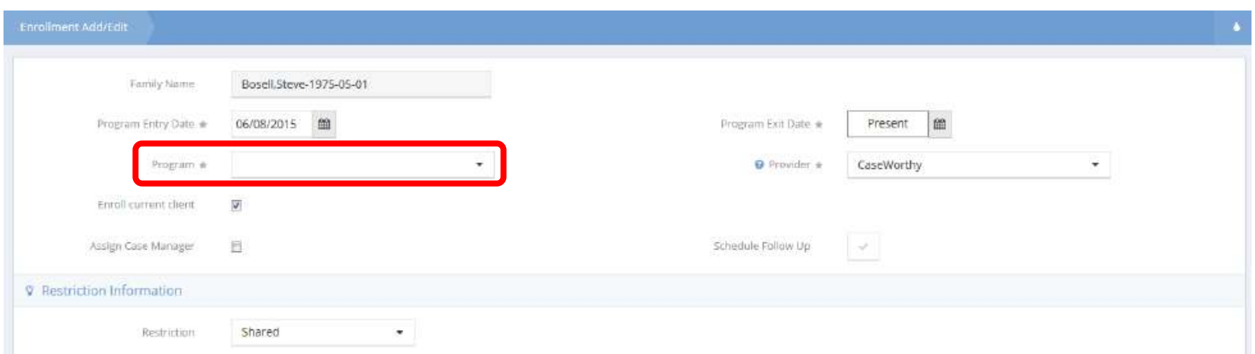
Enter any other desired info and click the Save button.



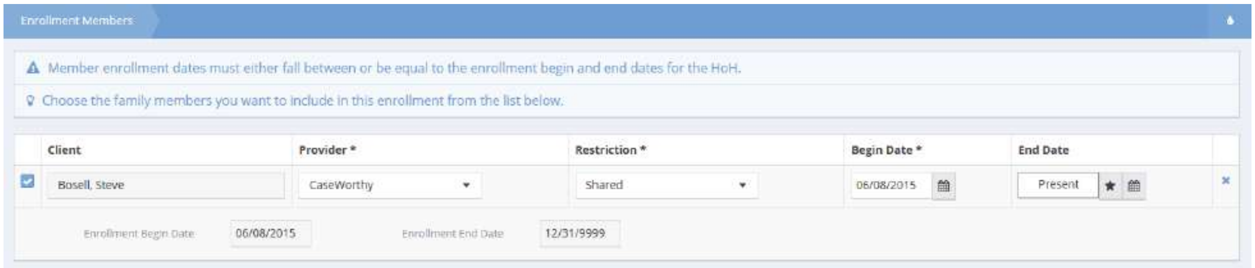
On the Add Family Members form, use the button and enter all required info to add a new family member. When all desired members are added, click the Save button.



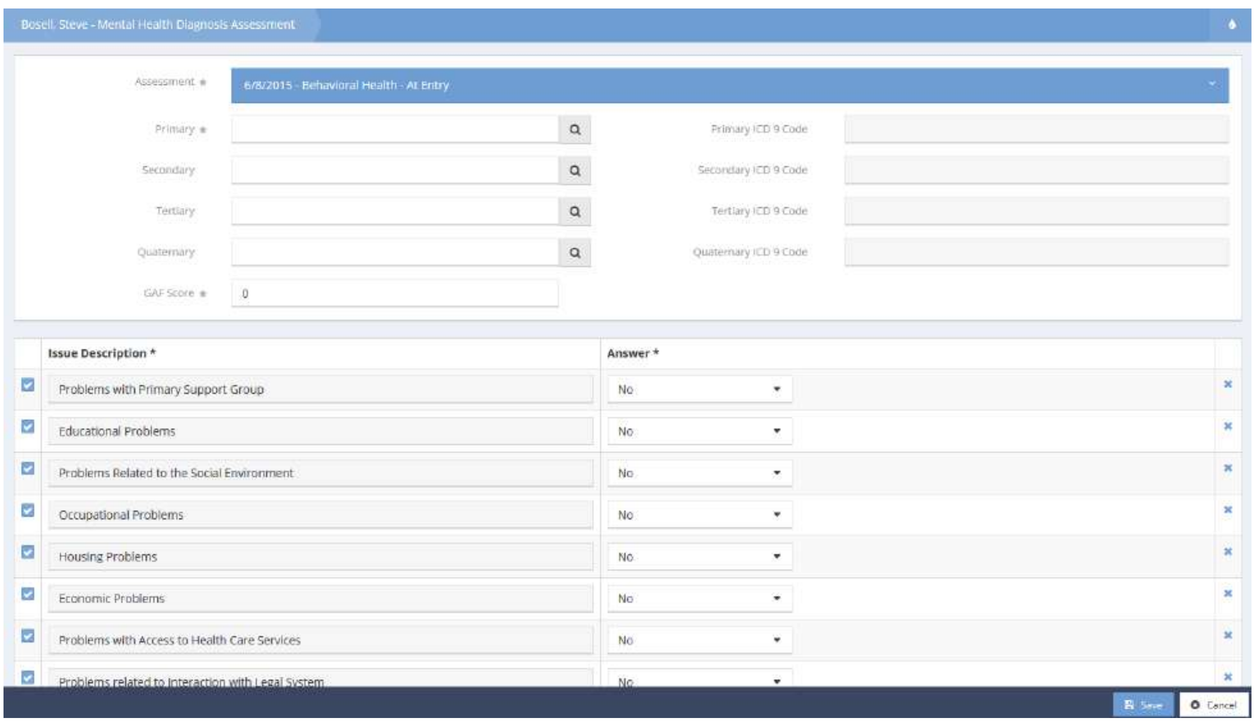
On the Enrollment Add/Edit form, select a program to be added from the Program drop-down list, select any other desired options and click the Save button.



On the Enrollment Members form, click the blue checkbox next to a family member to make any changes to the enrollment. Click the Save button when finished.

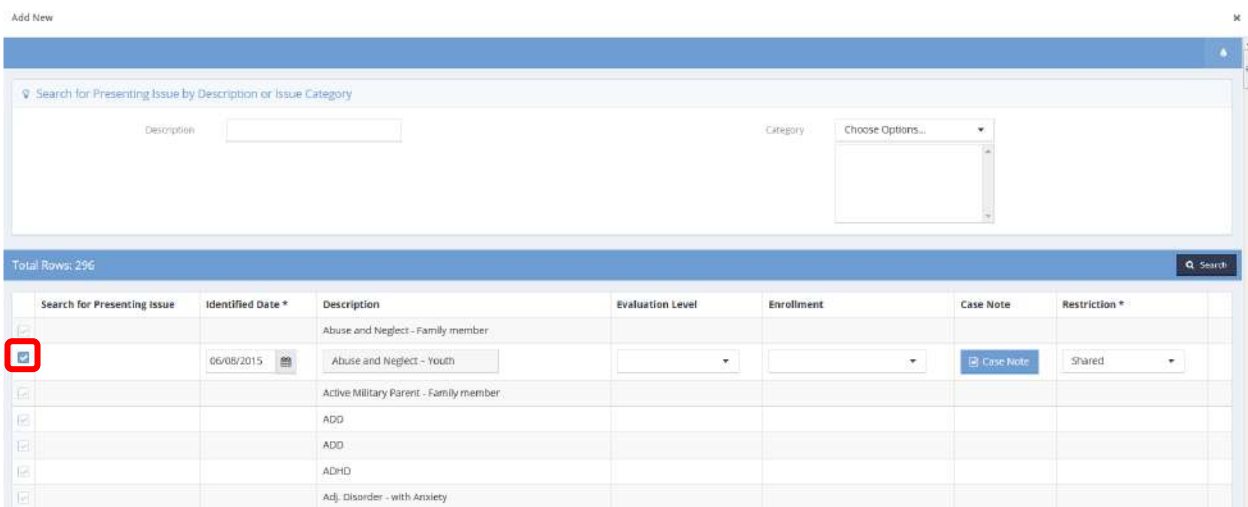


If an entry assessment is required, an assessment displays. Answer all questions and enter all required info and click Save when finished.



To add any issues, click the Add New button. The Add New form displays in a new window.

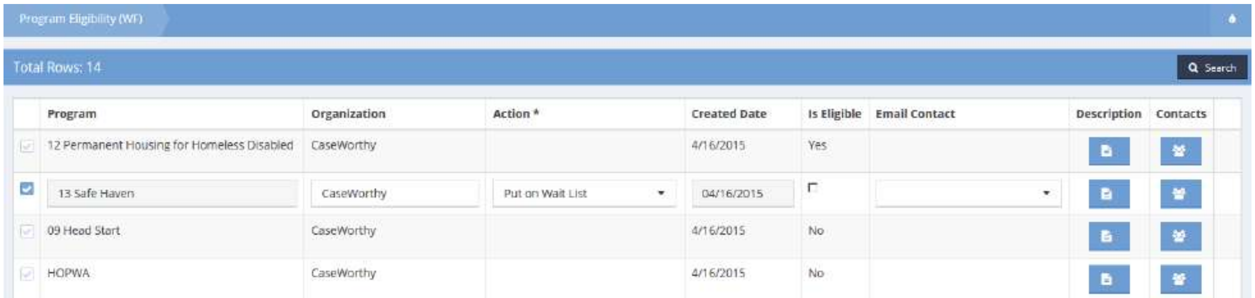
Use the search bar to filter issues and click the button. To add an issue, click the clear checkbox, change the date if necessary and select evaluation level and enrollment if desired. Click the Save button when finished.



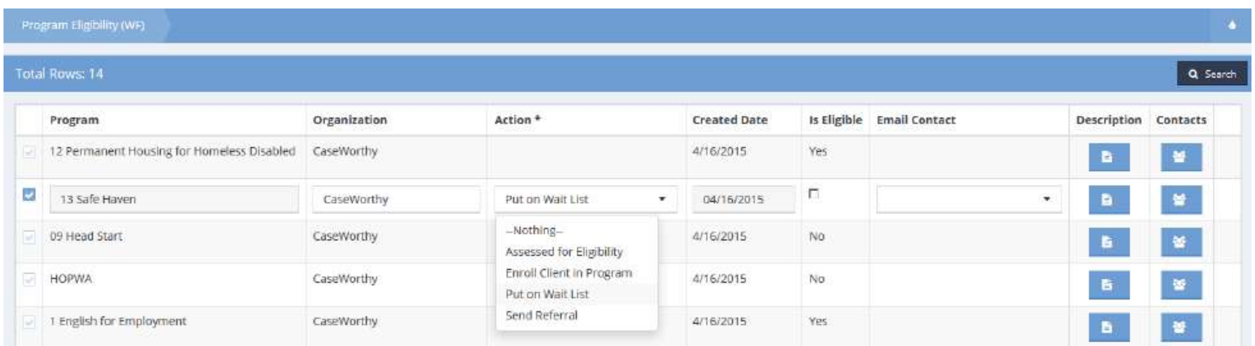
Finally, the Program Eligibility form displays. This form is used to indicate the client's eligibility for a program by selecting the action to be taken.

Locate the program being added and click on the clear checkbox associated with it.

The row expands.



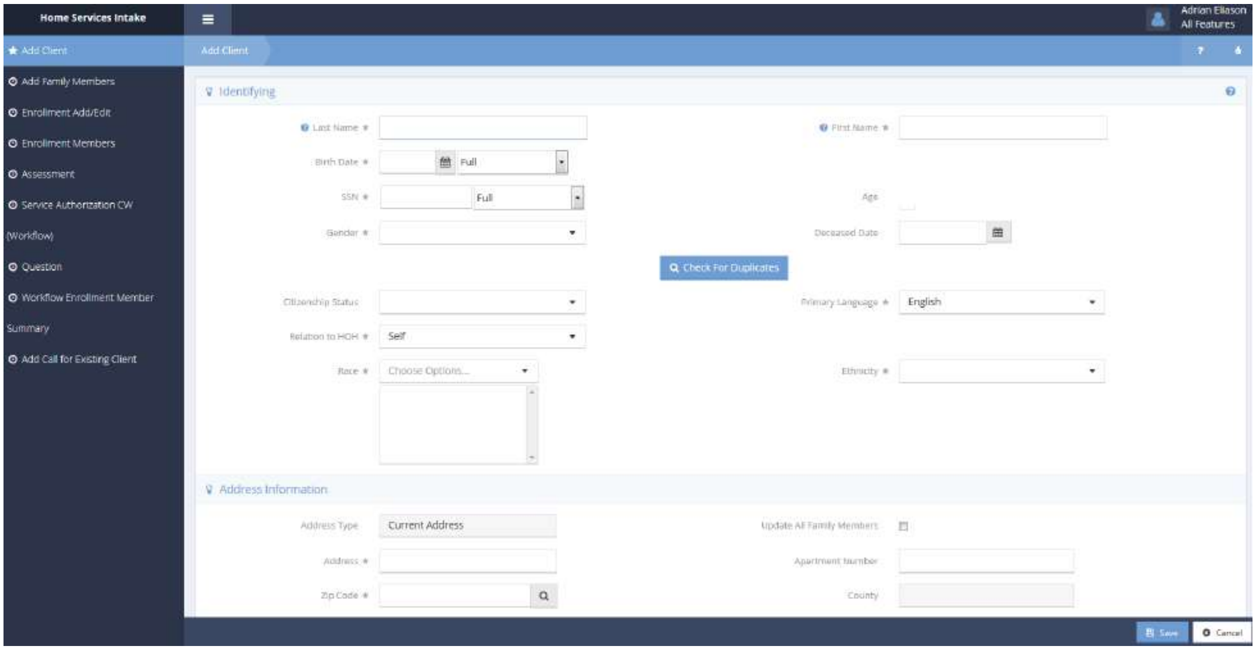
Click on the down arrow for the action column. Select the desired value from the drop-down list that appears.



Click on the Save button. The workflow is now complete.

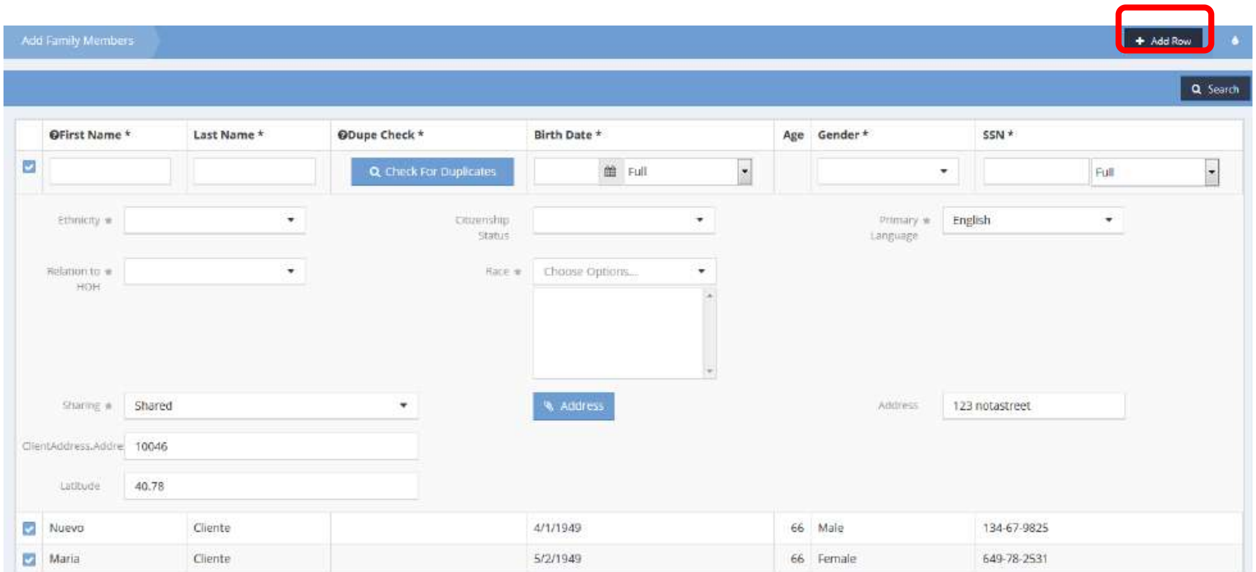
Home Service Intake

Objective: Add a client in a workflow with features such as adding authorized services, logging calls and adding enrollments.

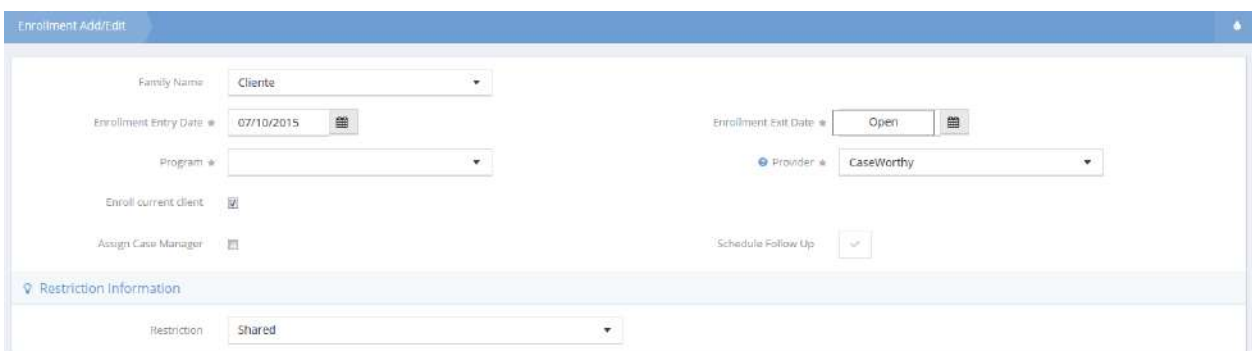


Enter any desired information and click the Check For Duplicates button. If the client already exists, select their name, otherwise click the This is a new client button. Enter an address and zip code, then click Verify Address and click the address if correct. Enter all other required information. Click Save when finished.

The Add Family Members form displays.



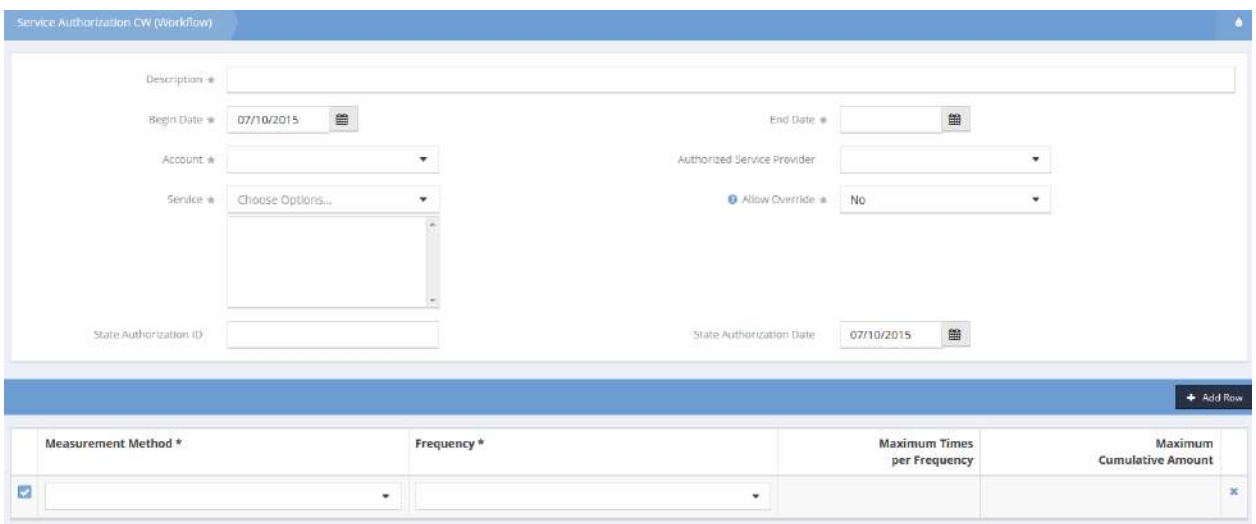
If desired, add family members by clicking Add Row and entering all required fields and verifying information as documented in the last step. Click Save when finished.



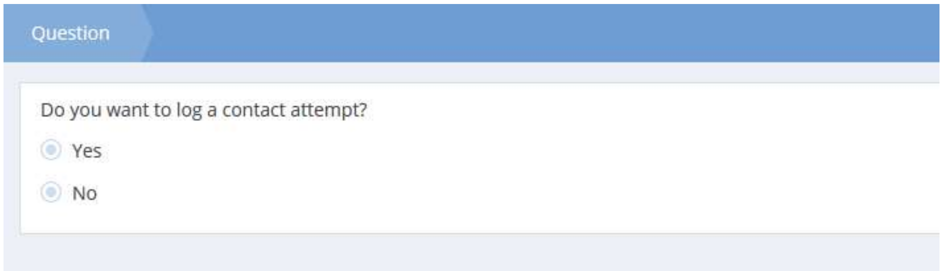
Select a program from the drop-down list and enter a date range and enter all other required information. Click Save when finished entering enrollment info. The Enrollment Members form displays.

To add additional family members to the enrollment, click the clear checkbox icon, verify all information and click Save when finished.

If an assessment is required, complete it as necessary. Click Save when finished.

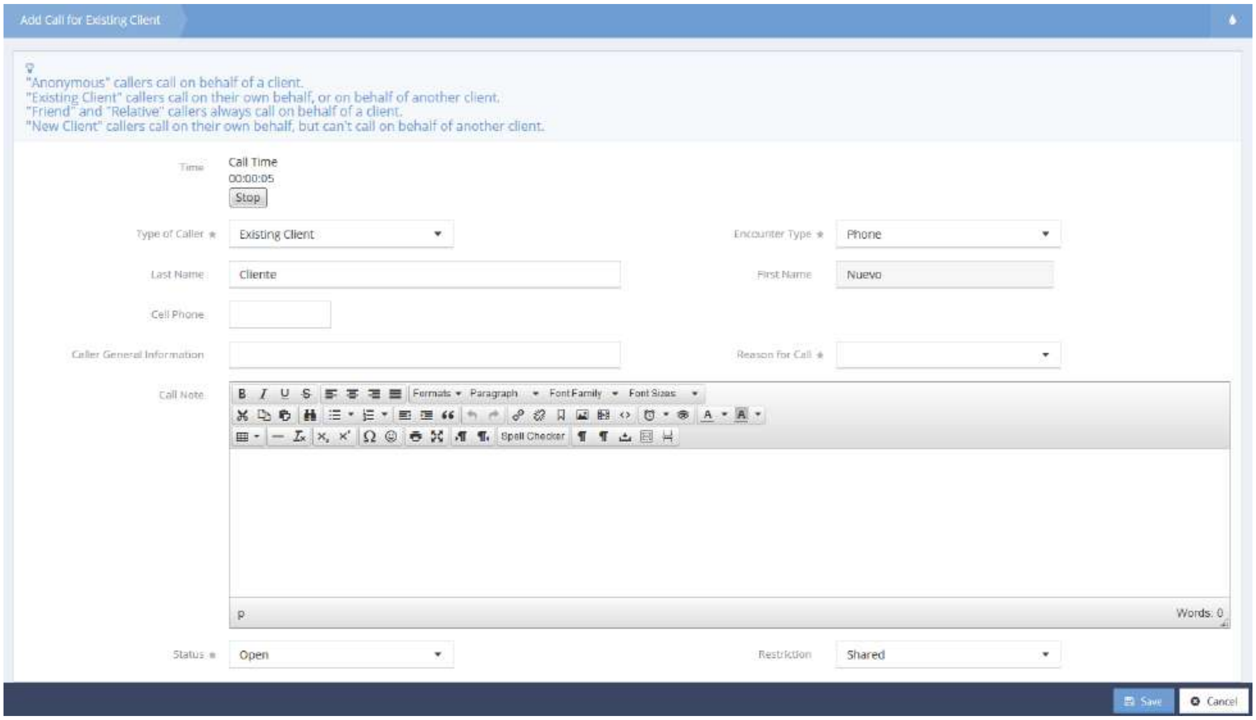


Enter a description, date range, select a funding account and select any required services from the drop-down list. In the spreadsheet, select a measurement method and frequency. Click the Add Row button to add additional rows. Click Save when finished.



Select the radio button for Yes if desired. Click Save to proceed.

The Add Call for Existing Client form displays.



Select a reason for call, enter all other relevant information and click the Stop button to stop recording time. Click Save when finished.

The Workflow Enrollment Member Summary form displays the status of the new enrollments. Click Done when finished viewing. The form displaying the completed steps of the workflow displays.

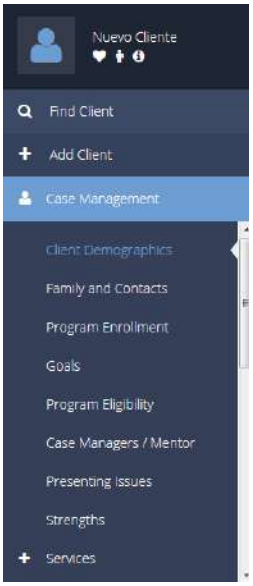
Workflow is now complete.

Status	Step Name	Completed By	Completed Date
✓	Add Client	Eliason, Adrian	7/10/2015
✓	Add Family Members	Eliason, Adrian	7/10/2015
✓	Enrollment Add/Edit	Eliason, Adrian	7/10/2015
✓	Enrollment Members	Eliason, Adrian	7/10/2015
✓	Assessment	Eliason, Adrian	7/10/2015
	Nuevo Cliente		
✓	HUD Universal Data	Eliason, Adrian	7/10/2015
✓	HUD Program Data	Eliason, Adrian	7/10/2015
✓	Chronic Homelessness (Input)	Eliason, Adrian	7/10/2015
✓	Service Authorization CW (Workflow)	Eliason, Adrian	7/10/2015
✓	Question	Eliason, Adrian	7/10/2015
✓	Workflow Enrollment Member Summary	Eliason, Adrian	7/10/2015
✓	Add Call for Existing Client	Eliason, Adrian	7/10/2015

Case Management

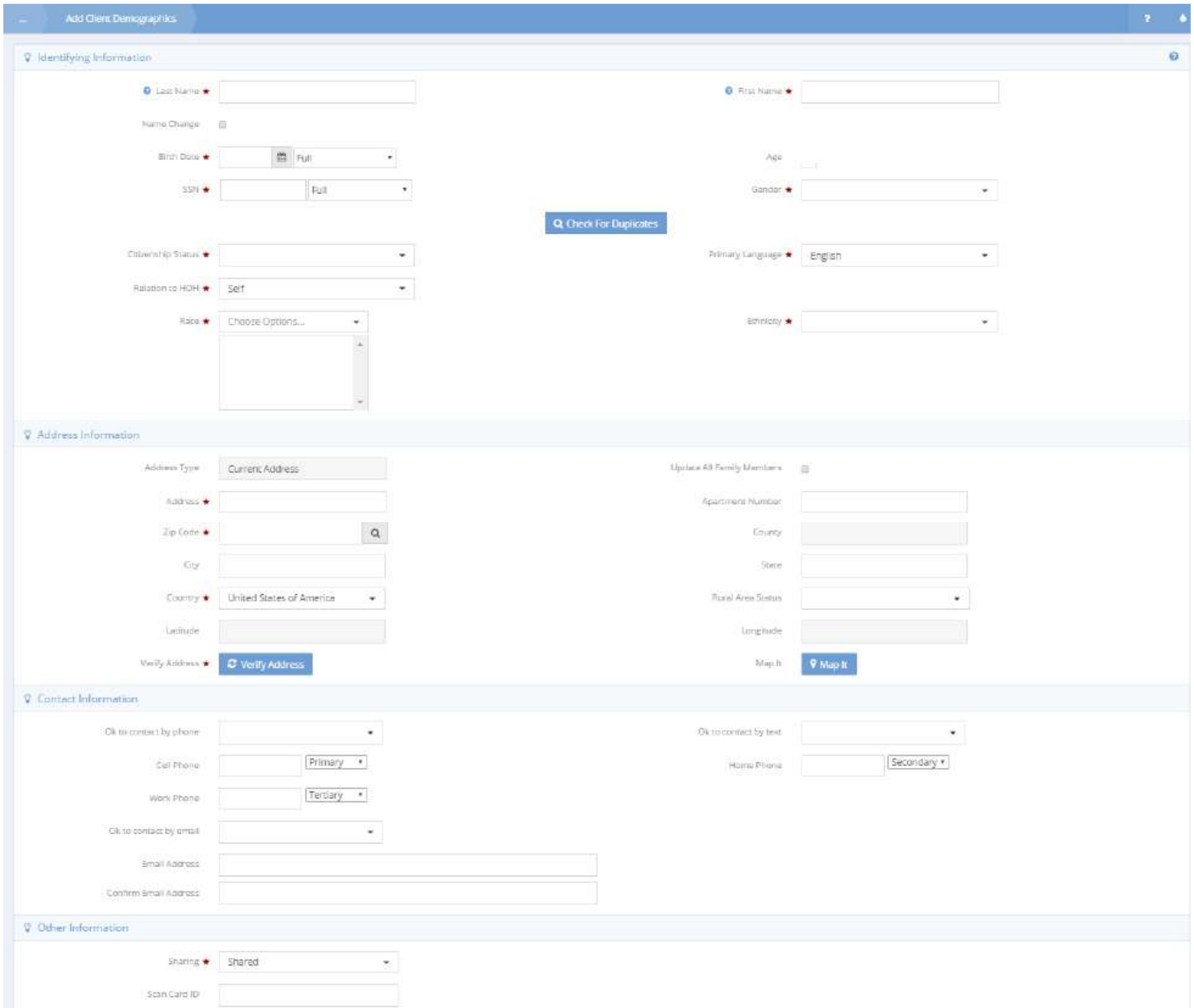
Below the Family Icon and client name is the Case Management menu group. The Case Management menu group includes links to forms that are typically related to the direct interactions between program staff and clients.

Client Demographics

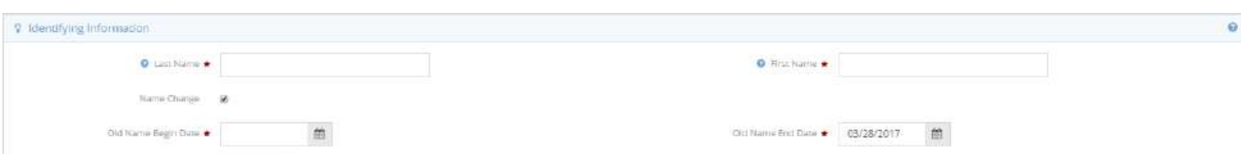


The first Case Management menu item is Client Demographics.

This form allows the user to view and edit any assigned client's basic demographic information.



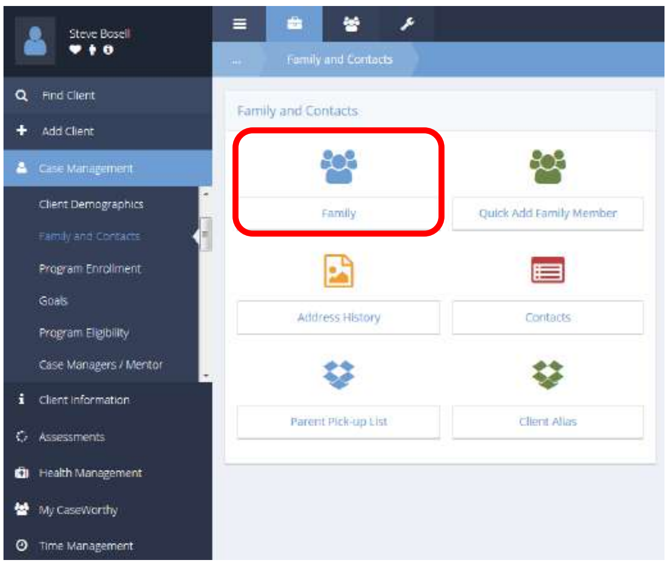
Note: ***This is the form that is launched when selecting*** Add Client ***from the menu. When selecting*** Client Demographics ***from the*** Case Management ***popup menu, it is populated with the existing data for the current client. Also, the Name Change checkbox, Old Name Begin Date and Old Name End Date fields are new and the Alias/Nickname and Veteran Status fields were removed. Old Name date fields appear when the Name Change checkbox is checked.***



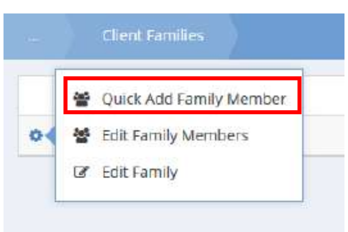
Family and Contacts

The second menu item in the Case Management menu group is the "Family and Contacts" dashboard. The family and contacts dashboard contains links to family member information, "Quick Add Family Member" form, as well as all the client's contacts (including emergency contact) and address history information. Summary forms can be accessed by clicking on the menu icons. The tables to the right of the menu display data for quick reference. A more detailed summary page of the table can be accessed by clicking on the data.

Family



Clicking the family icon launches the family summary form seen below.



The blue wheel, or gear  to the left of the family name is known as the "Action Gear," it allows access more information specific to the data on a form.

By clicking the action gear next to the family name, the user can either access the “Quick Add Family Member” form, edit the family name, or edit or view family members. (See below)

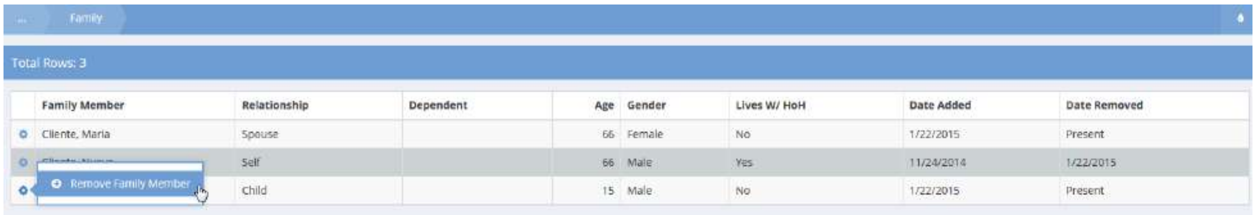
To edit a client’s information as it relates to the family, click the blue checkbox next to the client’s name. To add family members, click the **+ Add Family Member** button on the top right corner of the screen.

A new, expanded row displays. Click the magnifying glass to add a new family member. The "Find Client" form opens in a pop-up. If the new family member already exists in the system, it is possible to search for them. To create a new client as a family member, click **+ Add New** in the top right-hand corner and complete the demographics form for the new family member.

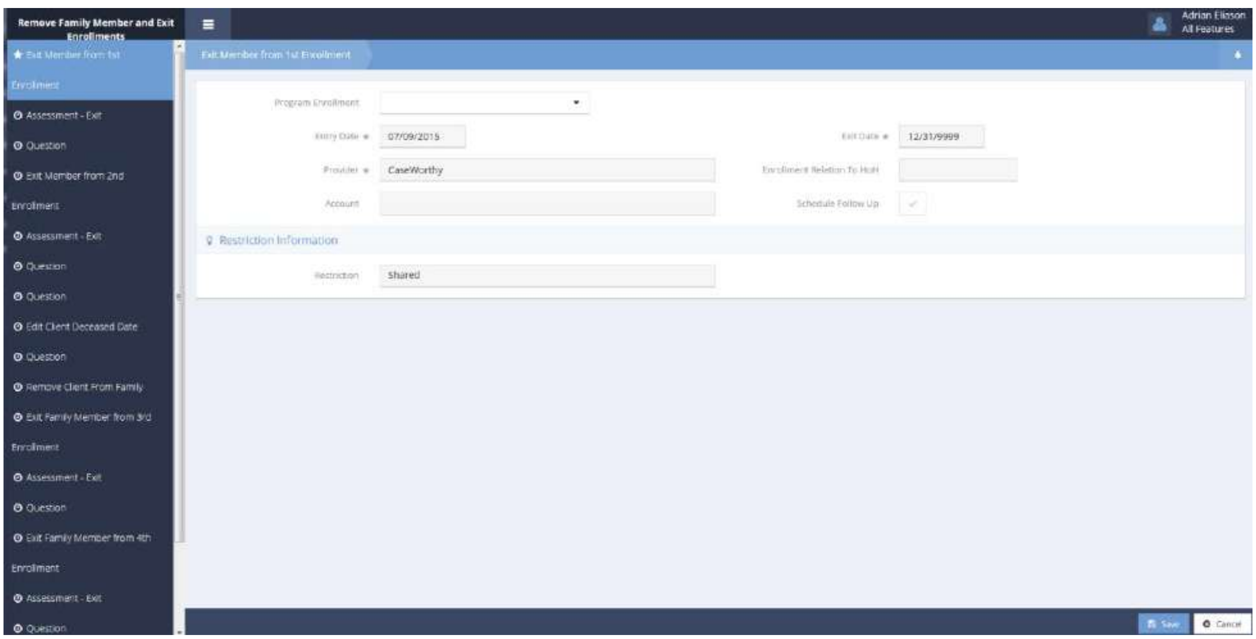
Note: ***The client address and ethnicity populate based on the HoH's information. This data can be changed for the family member if needed.***

Remove Family Member

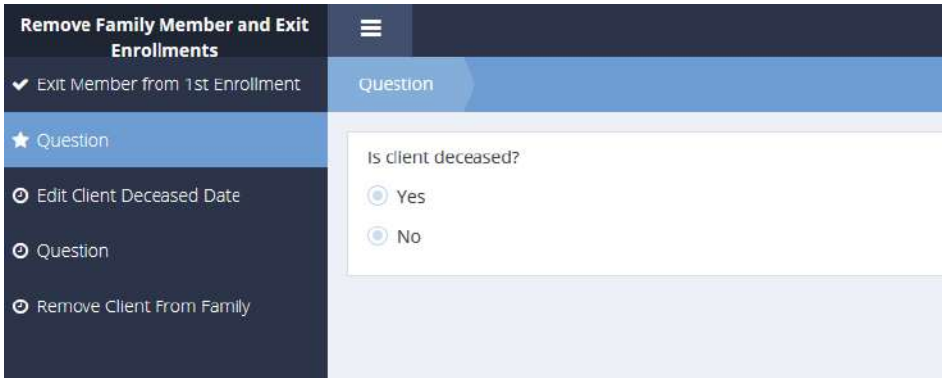
To remove a family member, click the action gear icon associated with the desired family member and select Remove Family Members from the popup menu that appears. The Remove Member from Family form displays.



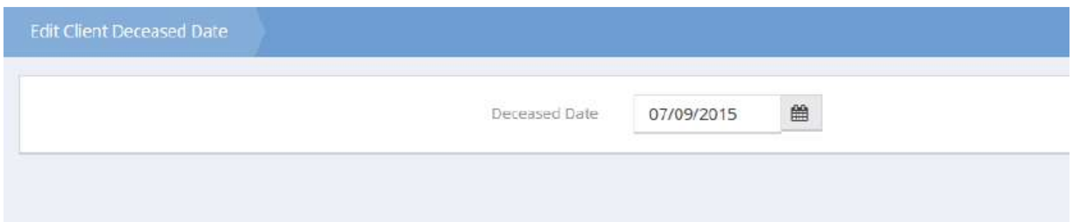
To remove a family member, click the action gear icon and click Remove Family Member. The Remove Family Member and Exit Enrollments workflow displays.



To exit an enrollment, select it from the drop-down list and click the Save button. If an exit assessment is required, it displays as the next step.

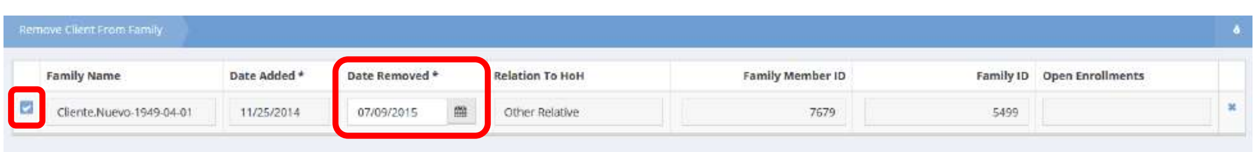


If the client is deceased, click the radio button for Yes. Click the Save button.



If "Yes" was selected for the previous step, the Edit Client Deceased Date appears. Enter the deceased date and click Save when finished.

To remove the client from the current family, click the radio button for Yes. Click the Save button.



If "Yes" was selected on the previous step, the Remove Client From Family form displays. To remove, click the blue checkbox and enter a date removed. Click the Save button.

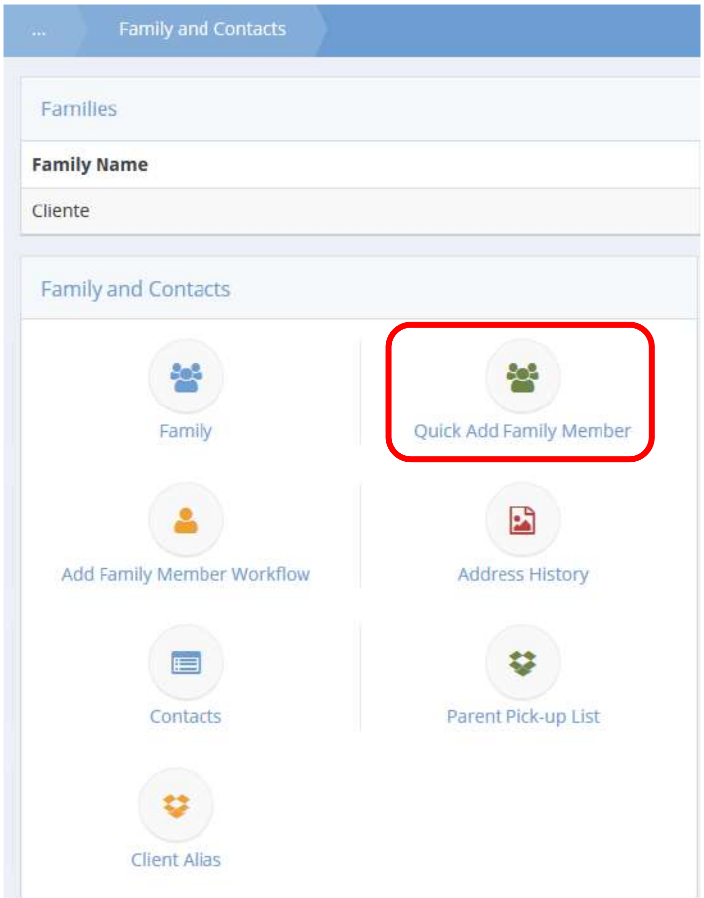
Workflow is now complete.

Status	Step Name	Completed By	Completed Date
✔	Exit Member from 1st Enrollment	Eliason, Adrian	7/9/2015
✔	Question	Eliason, Adrian	7/9/2015
✔	Edit Client Deceased Date	Eliason, Adrian	7/9/2015
✔	Question	Eliason, Adrian	7/9/2015
✔	Remove Client From Family	Eliason, Adrian	7/9/2015

The workflow is now complete.

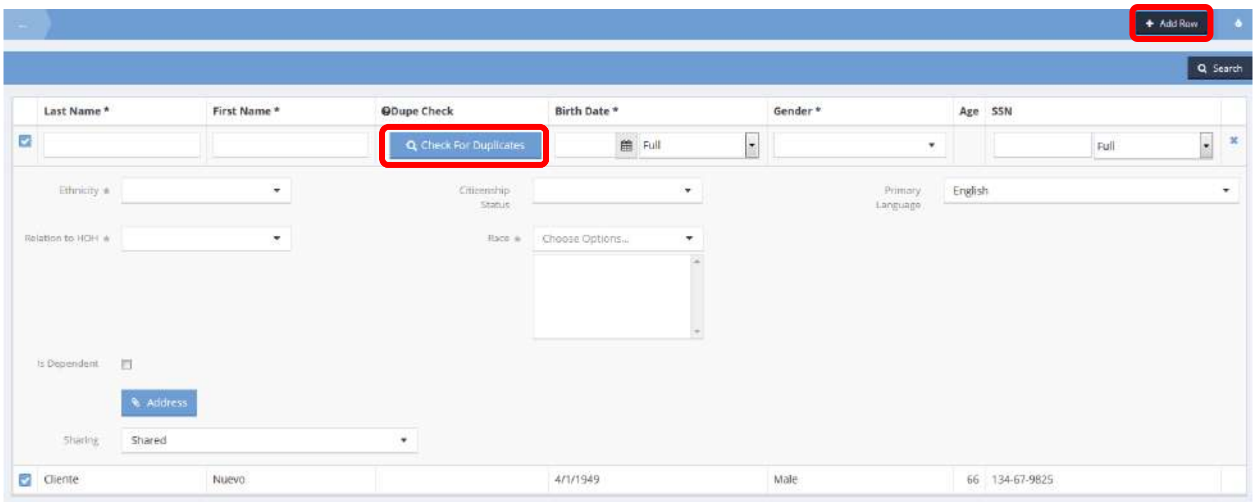
Quick Add Family Member

Objective: Quickly add members to a family.



Click the icon for Quick Add Family Member.

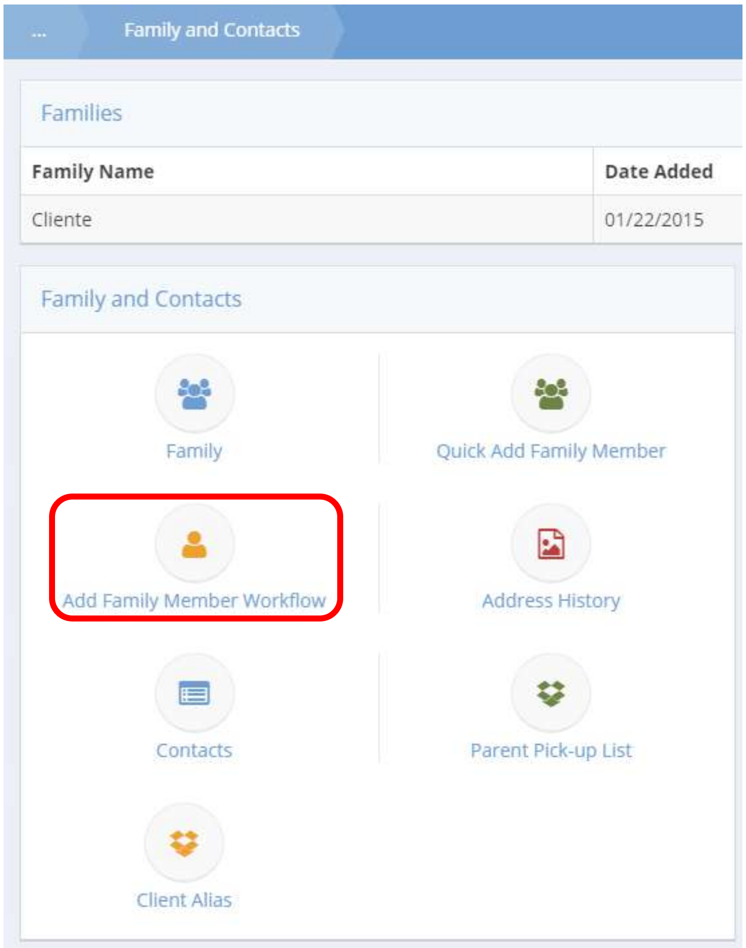
The Quick Add Family Member form displays.



To add a new family member, click the **+ Add Row** button. Enter all required fields and run a duplicate check by clicking the **Check For Duplicates** button. If the client being added is a new client, click the **This is a new client** button. Click **Save** when finished adding family members.

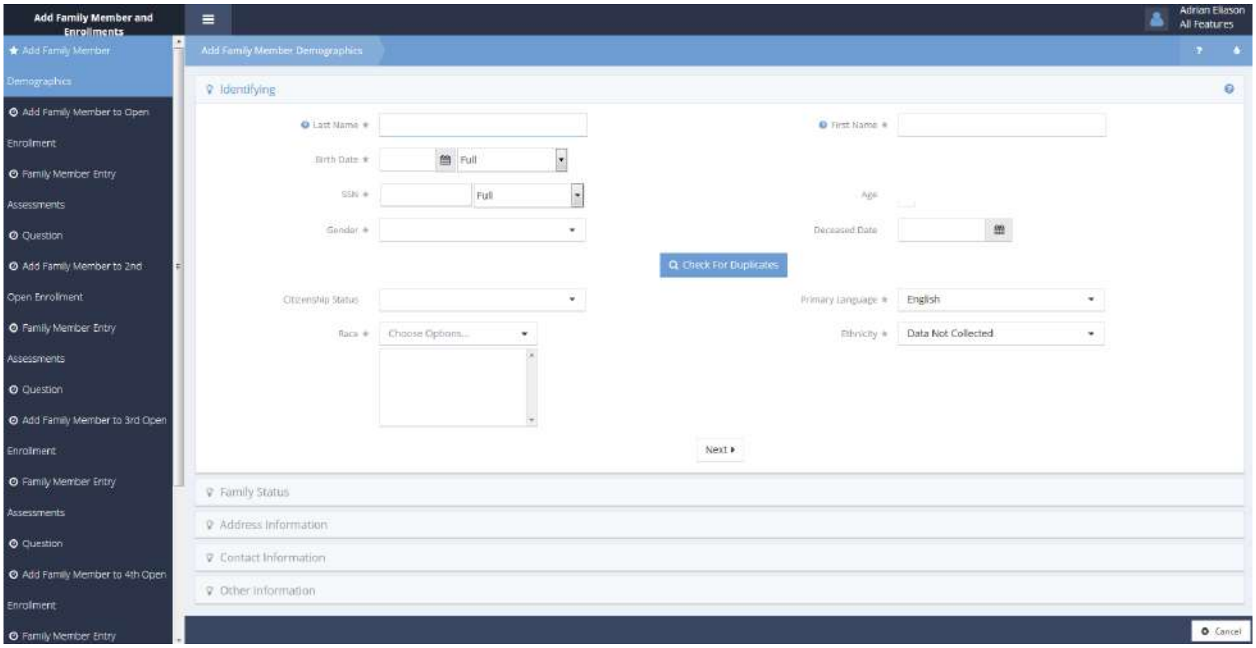
Add Family Member Workflow

Objective: Add a family member in a workflow with the option for adding multiple enrollments.

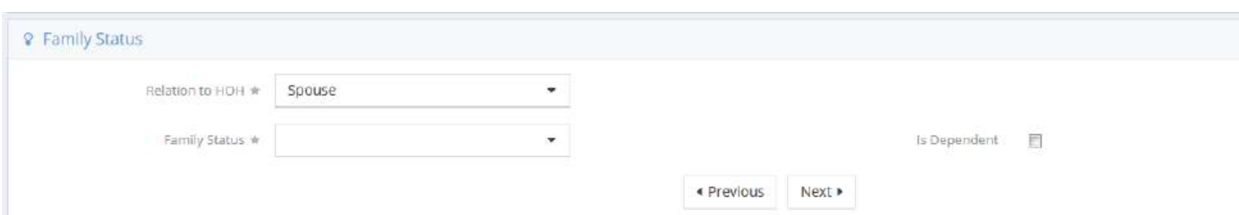


Click the icon for Add Family Member Workflow.

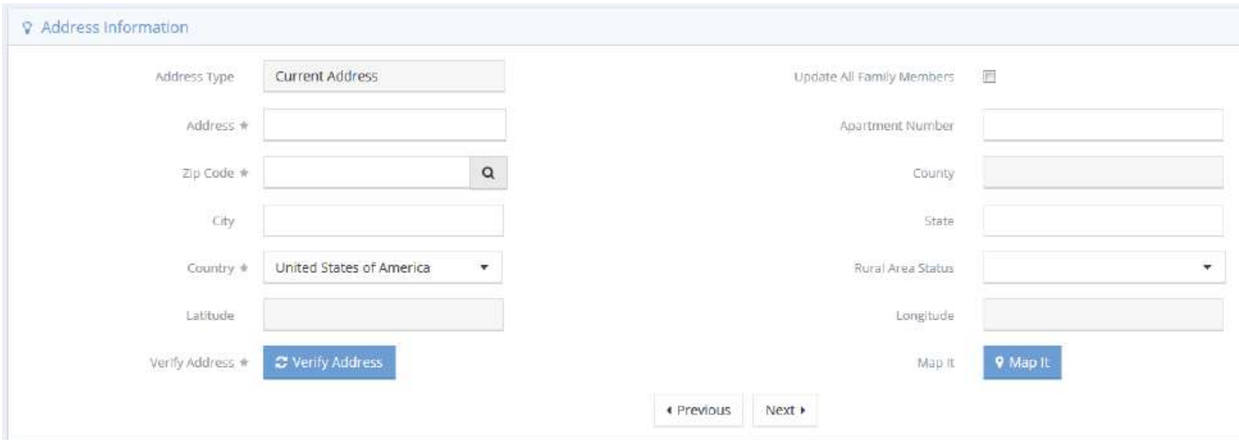
The first form that displays in the workflow is the Add Family Member Demographics form.



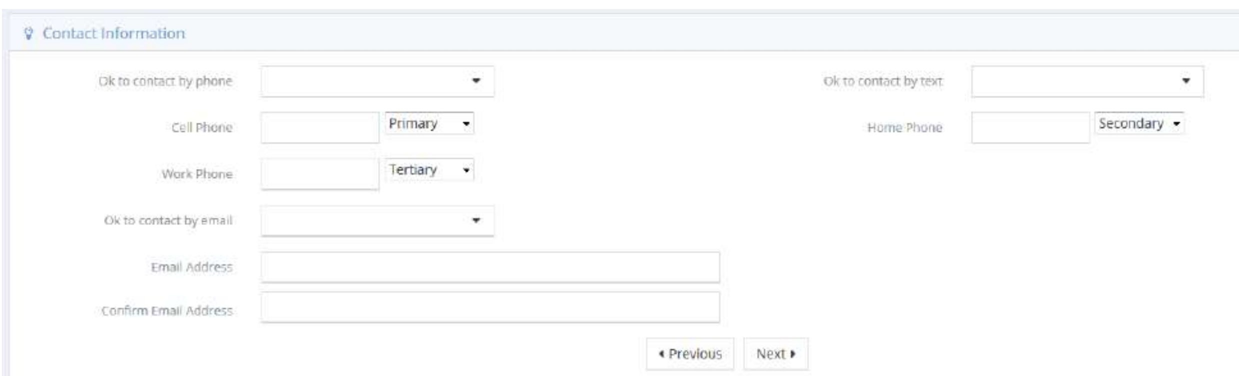
Enter all required information and click the Check For Duplicates button. If the client already exists, select their name, otherwise click the This is a new client button. Once all fields are entered, click the Next button.



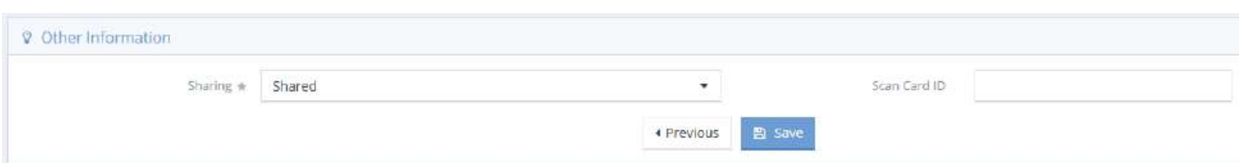
Select a relation to head of household and a family status. Click the Next button.



Enter an address and zip code, then click the Verify Address button. The address verification popup appears. Click on the address if correct. Click the Next button.

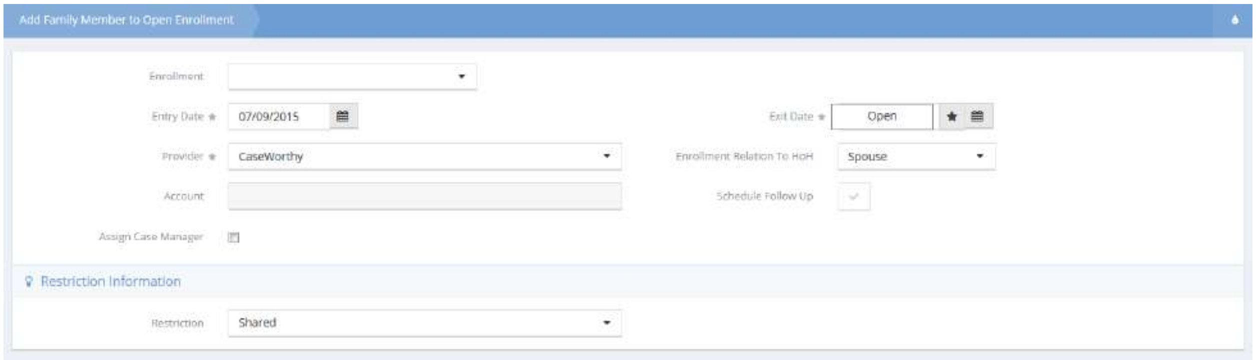


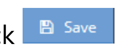
Enter any available contact information and click the Next button.



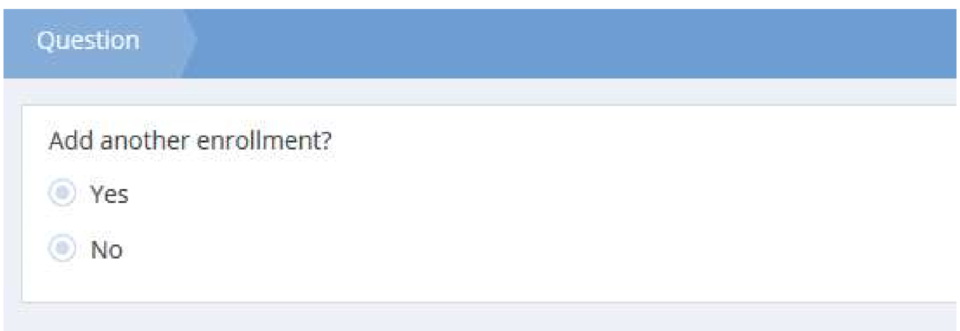
Finally, select a sharing status and enter a scan card ID if applicable. Click Save when finished.

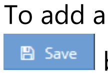
The next form in the workflow that displays is the Add Family Member to Open Enrollment form.



Select an enrollment and edit all other fields as desired. Click  when finished. If an assessment is required for the enrollment, the assessment displays as the next step.

When the assessment is finished, the Question form displays.



To add another enrollment, click the radio button for Yes. Otherwise click the one for No. Click the  button.

Adding each enrollment is the same as the first.

After selecting No on the Add another enrollment question, the workflow ends.

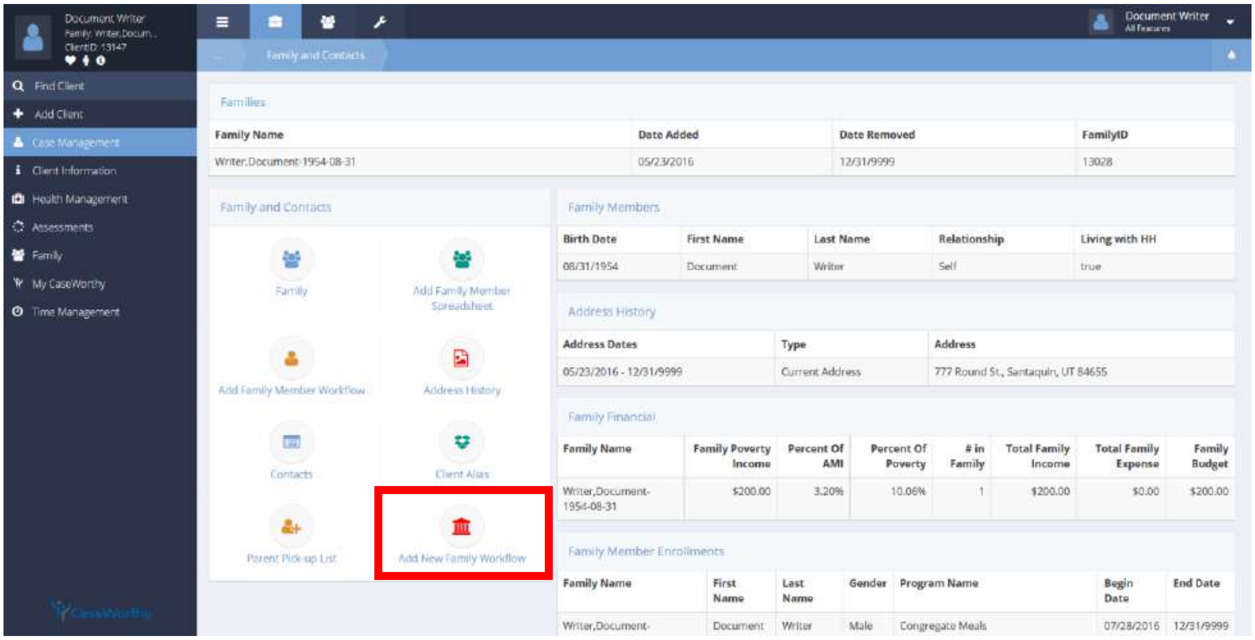
Workflow is now complete.

Status	Step Name	Completed By	Completed Date
✔	Add Family Member Demographics	Eliason, Adrian	7/9/2015
✔	Add Family Member to Open Enrollment	Eliason, Adrian	7/9/2015
✔	Family Member Entry Assessments	Eliason, Adrian	7/9/2015
✔	Assessment	Eliason, Adrian	7/9/2015
	Maria Cliente		
✔	Non-HUD Financial	Eliason, Adrian	7/9/2015
✔	Assess Outcomes	Eliason, Adrian	7/9/2015
✔	Question	Eliason, Adrian	7/9/2015
✔	Add Family Member to 2nd Open Enrollment	Eliason, Adrian	7/9/2015
✔	Family Member Entry Assessments	Eliason, Adrian	7/9/2015
✔	Assessment	Eliason, Adrian	7/9/2015
	Maria Cliente		
✔	Non-HUD Financial	Eliason, Adrian	7/9/2015
✔	Assess Outcomes	Eliason, Adrian	7/9/2015
✔	Question	Eliason, Adrian	7/9/2015

Add New Family Workflow

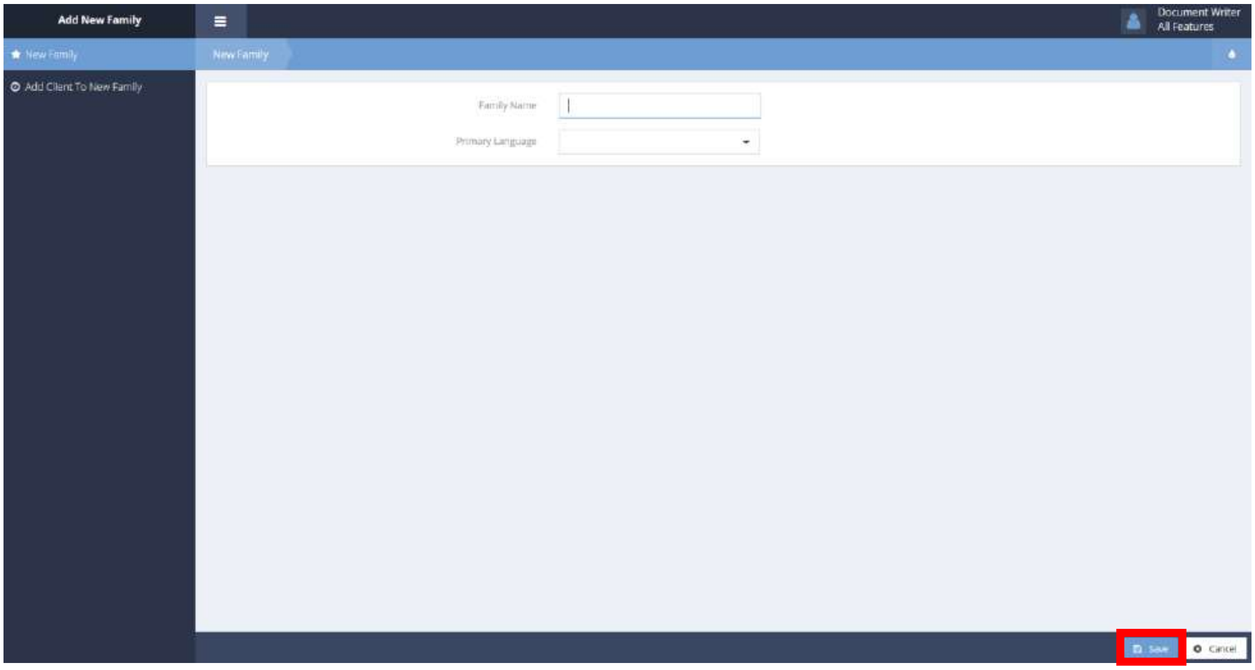
Objective: Quickly add a new family through a workflow.

Navigation: Case Management>Case Management>Family and Contacts



Select Add New Family Workflow from the Family and Contacts dashboard.

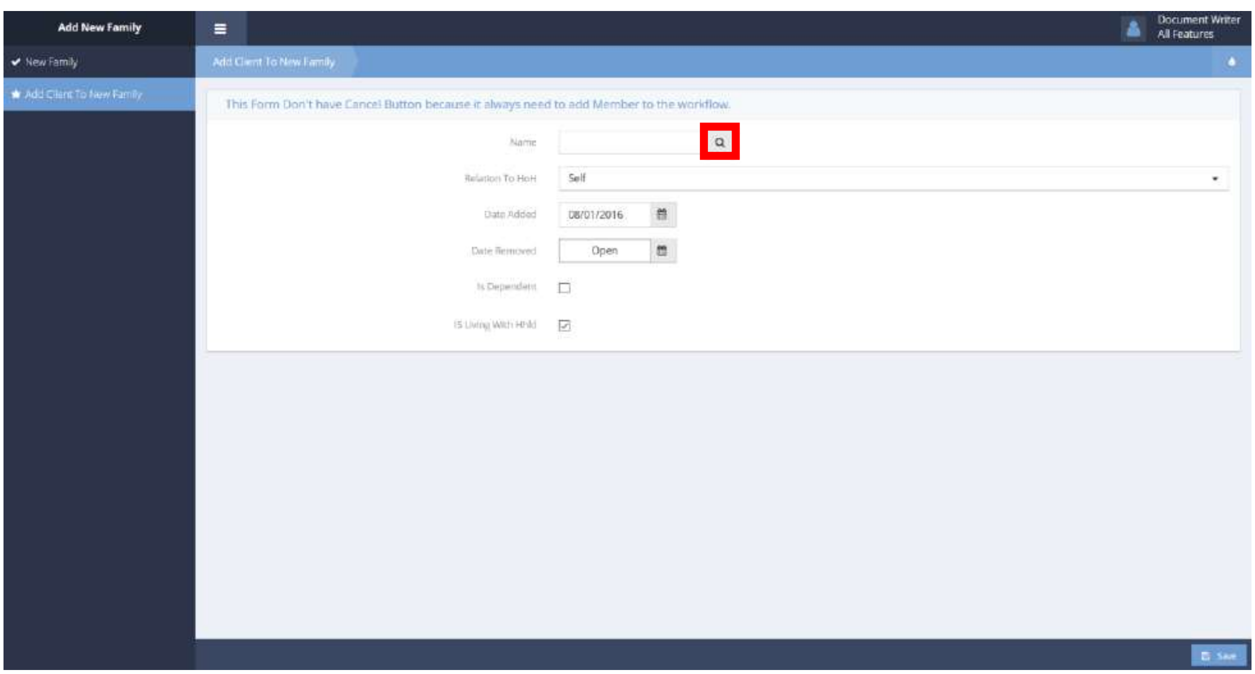
The Add New Family Workflow displays.



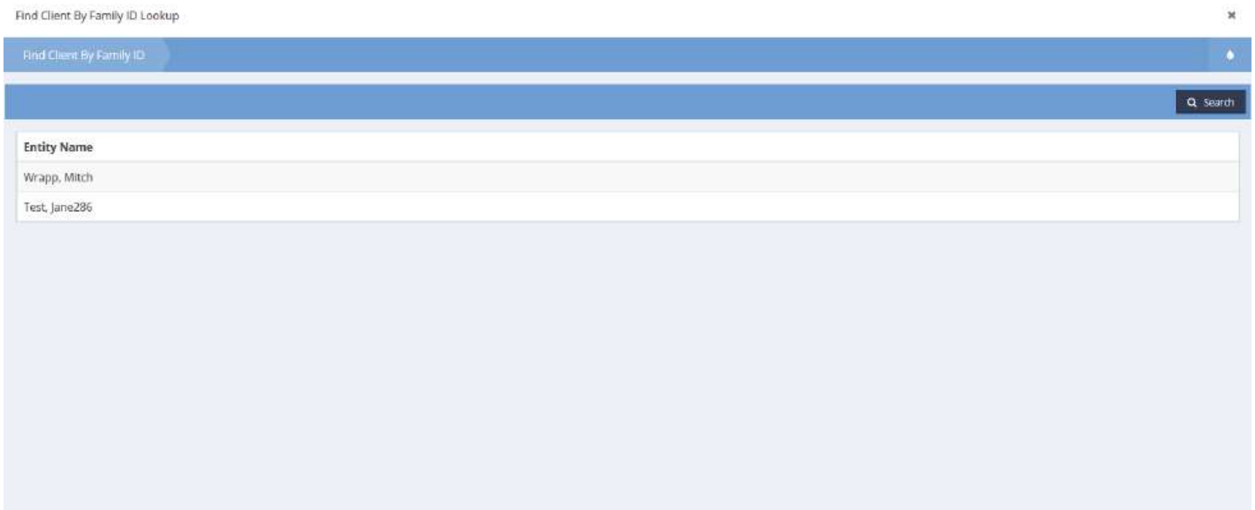
Enter a Family Name and Primary Language for the new family. Click the 

button to save and continue.

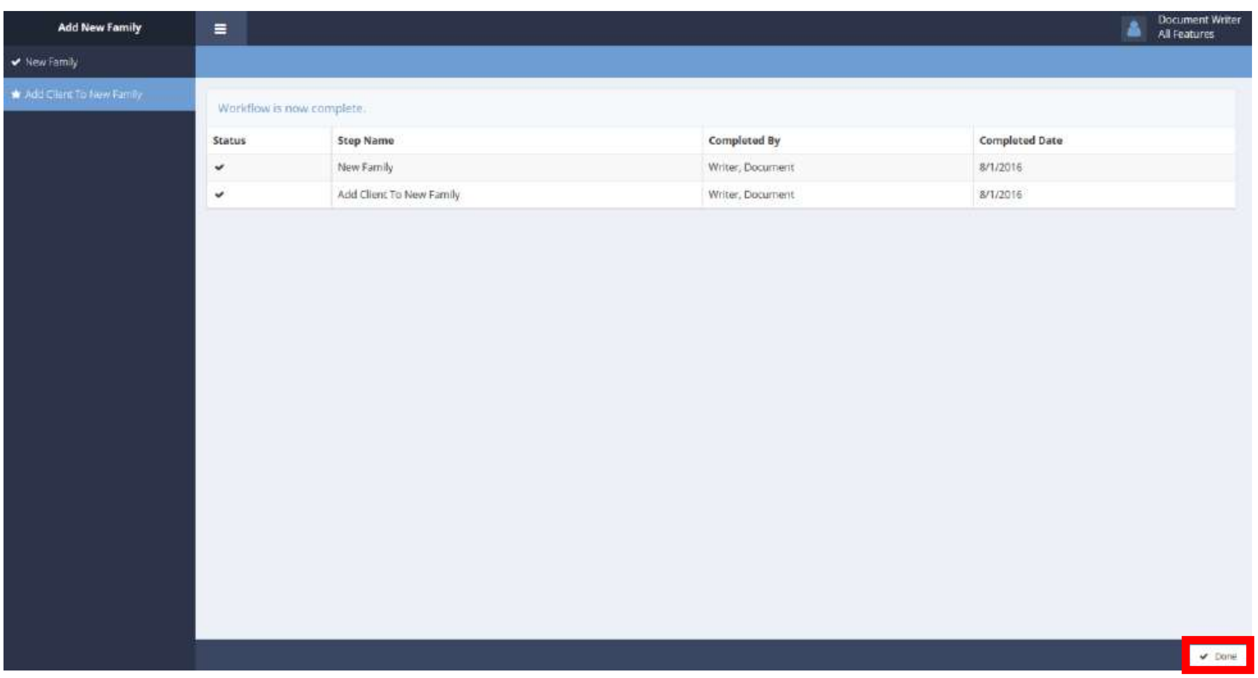
The Add Client To New Family form displays.



Use the magnifying glass icon to select a client to add to the new family. The Find Client By Family ID form displays in a new pop-up window.

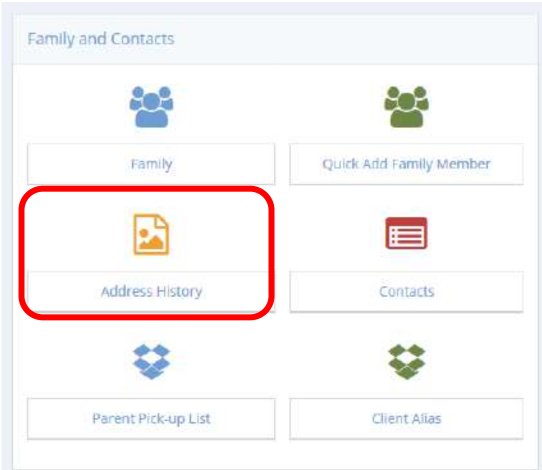


Family members in the current family display. Select a family member to add, the form closes upon selection. The family member auto populates the Name field of the previous form. Fill in the remaining fields as desired. Click the Save button to save. A new screen appears, indicating completion of the workflow.

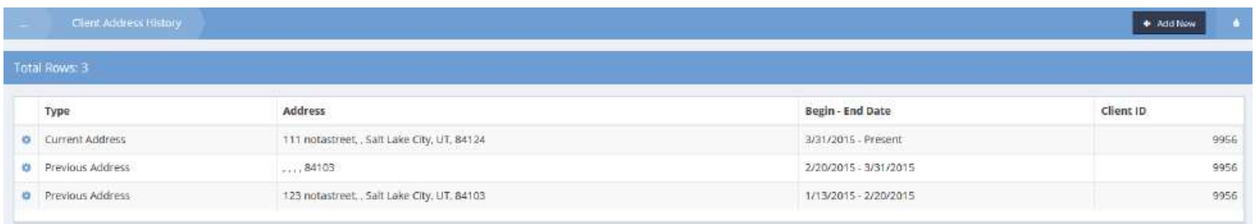


Click the ✔ Done button to exit.

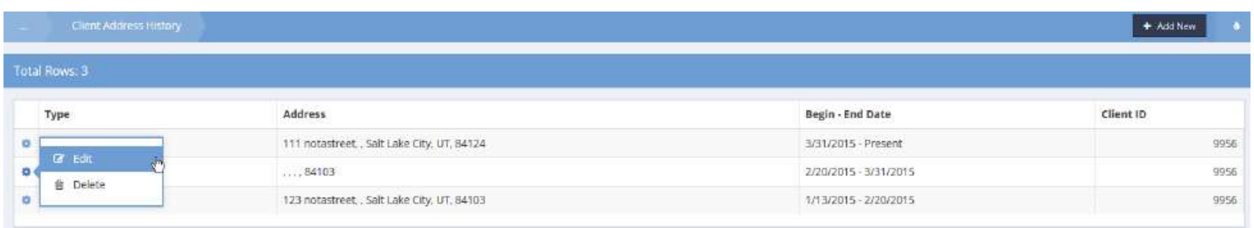
Address History



Clicking the Address History icon displays the Client Address History form.



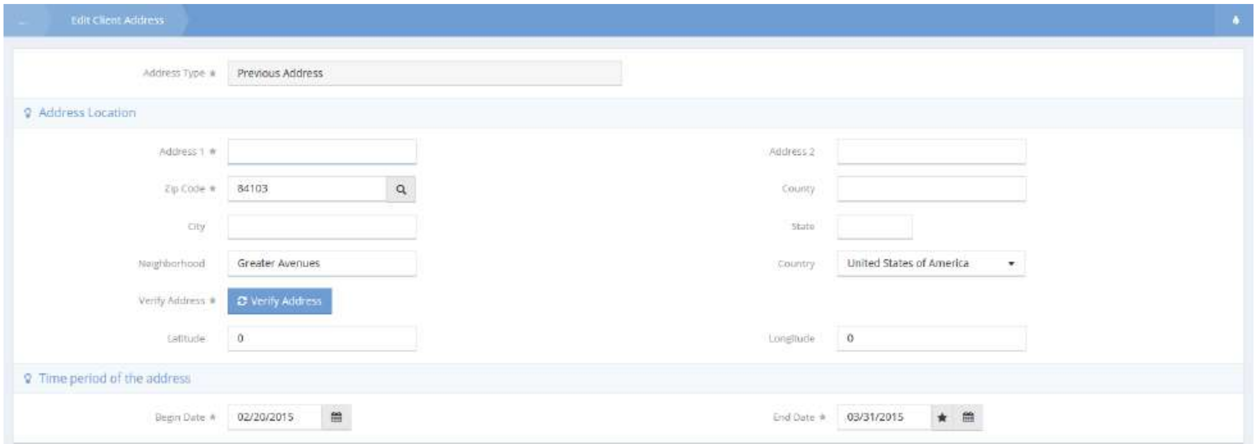
Locate the desired address type and click on the associated action gear. Select Edit form the pop-up menu that displays.



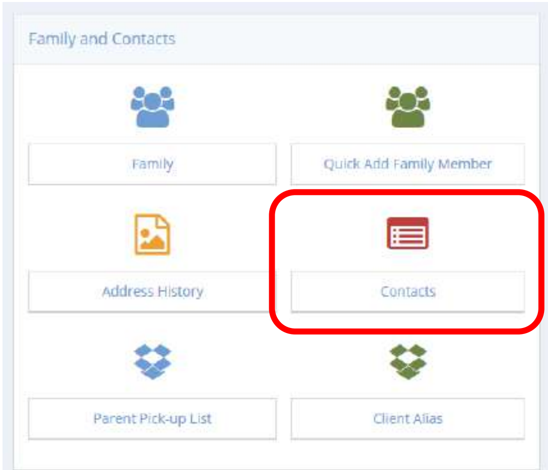
The Client Address Edit form appears.

Make any needed alterations and click on the 

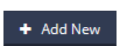
button.



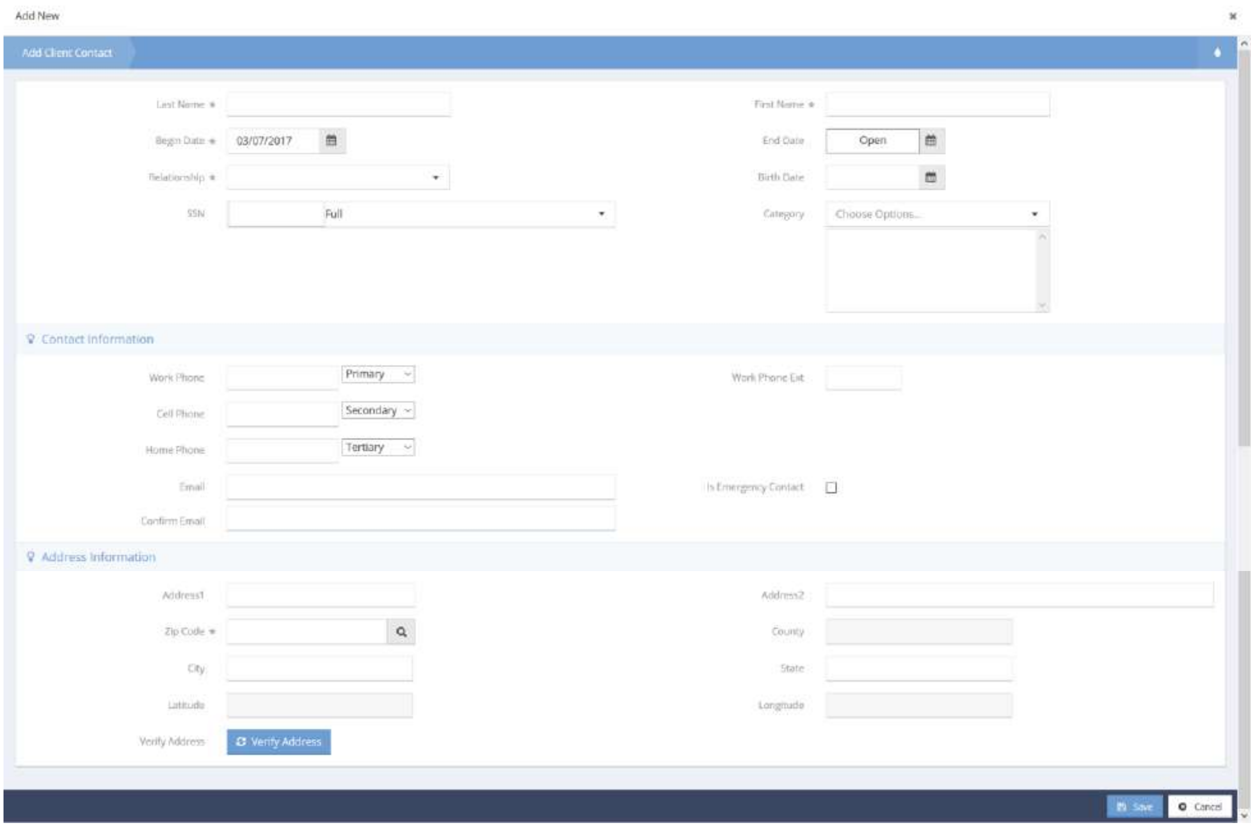
Contacts



To access a summary page of contacts, click the "Contacts" icon.

Click 

in the top right corner to create a new client contact. Click the action gear  and click Edit to edit an existing contact.

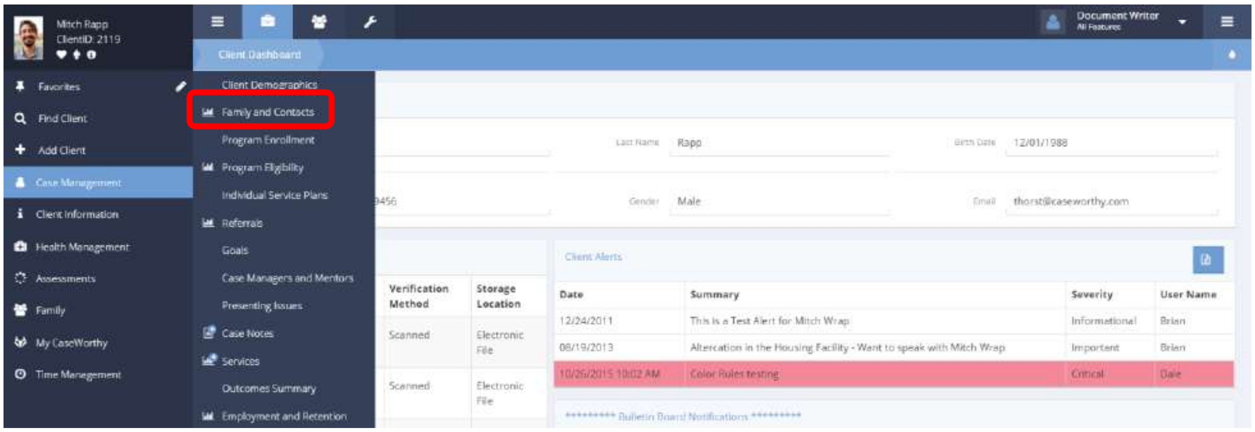


When adding or editing a new contact, select the client's relationship to the contact from the dropdown list. Use the checkbox to denote that this contact is the client's emergency contact. Add all desired information and save.

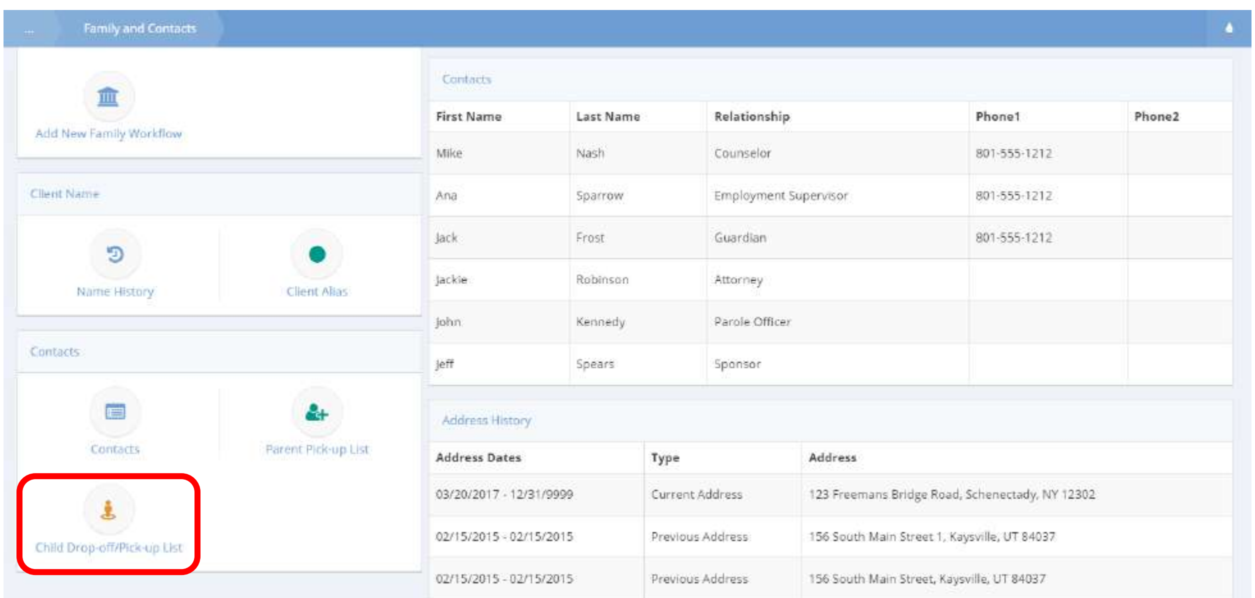
Child Care Pick up/ Drop off

Objective: Add a new person to pick up a child.

Navigation: Case Management>Case Management>Family and Contacts>Child drop off/pick up list>Add New



Under the Case Management tab, select Case Management. A pop-up menu appears. Select the Family and Contacts dashboard. The Family and Contacts dashboard appears.

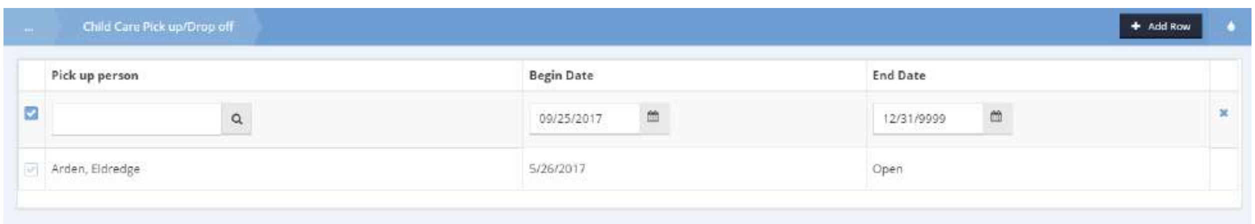


Click the icon labeled Child Drop-off/Pick-up List under the category Contacts.

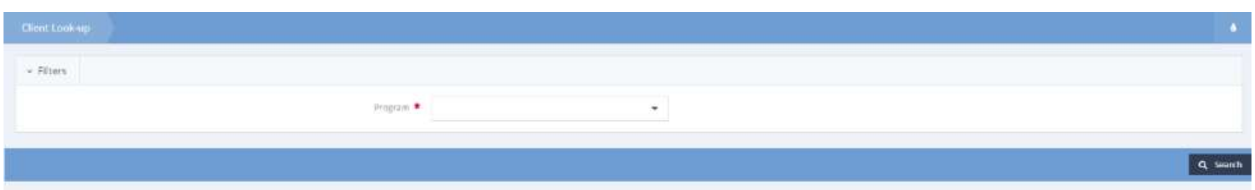
The Child Care Pick up form displays a list of all people authorized to pick up/drop off.

Click the **Add New** button to add or remove someone from the list. The Child Care Pick up/Drop off form appears.

Click the **Add Row** button. A new row appears.

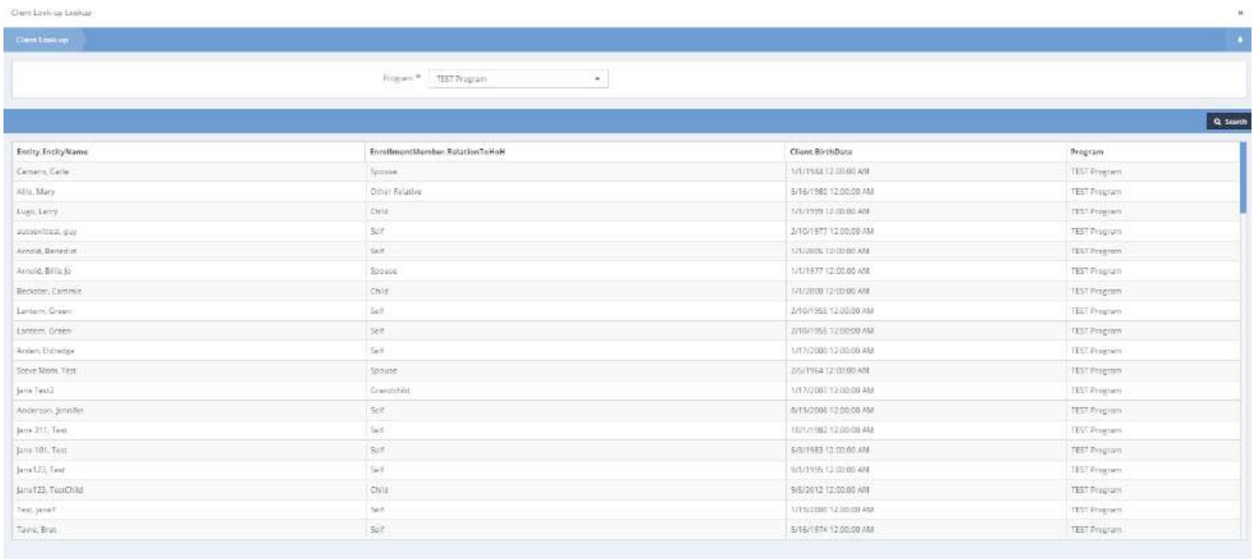


Click the 🔍 icon to find a new person permitted to pick up and drop off the child. The Client Look-up form appears.

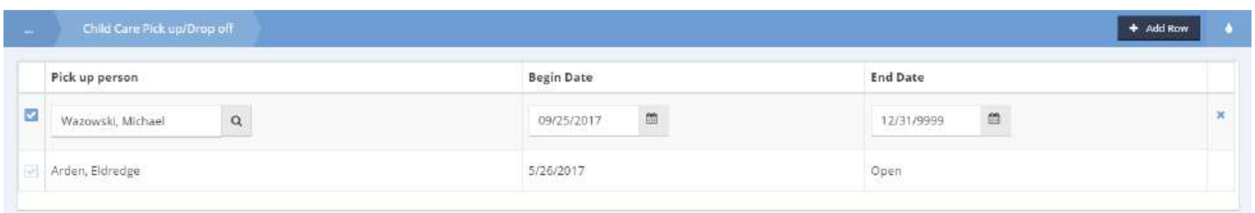


Click the drop-down arrow to select a program to search within.

Once selected, a list of people populates under the Search button.



Select a person to return to the Child Care Pick up/Drop off form.



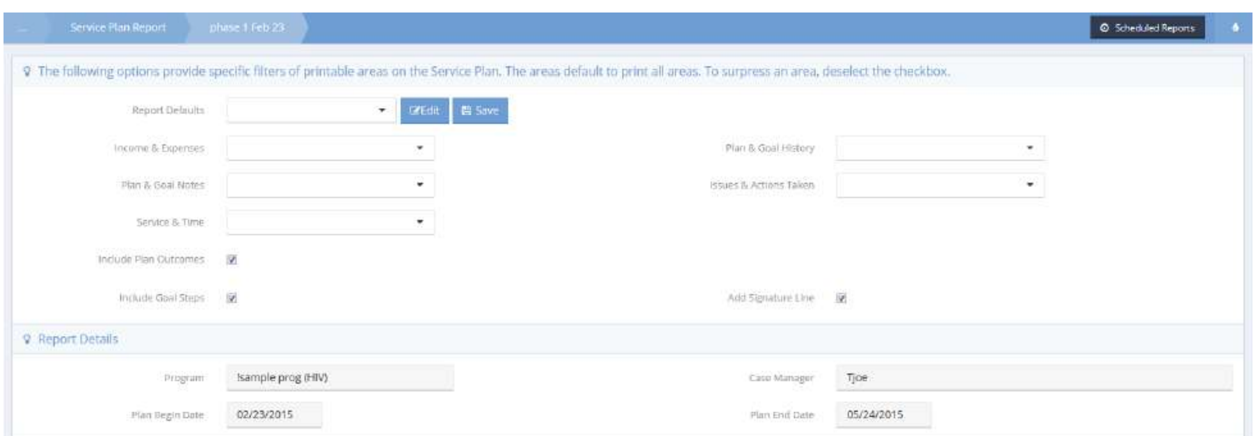
Select a person by clicking on the checkbox icon to make it turn blue. Adjust the begin and end dates by clicking the icons. Click the Save button to return to the Child Care Pick up form.

Individual Service Plans

Individual Service Plan Summary

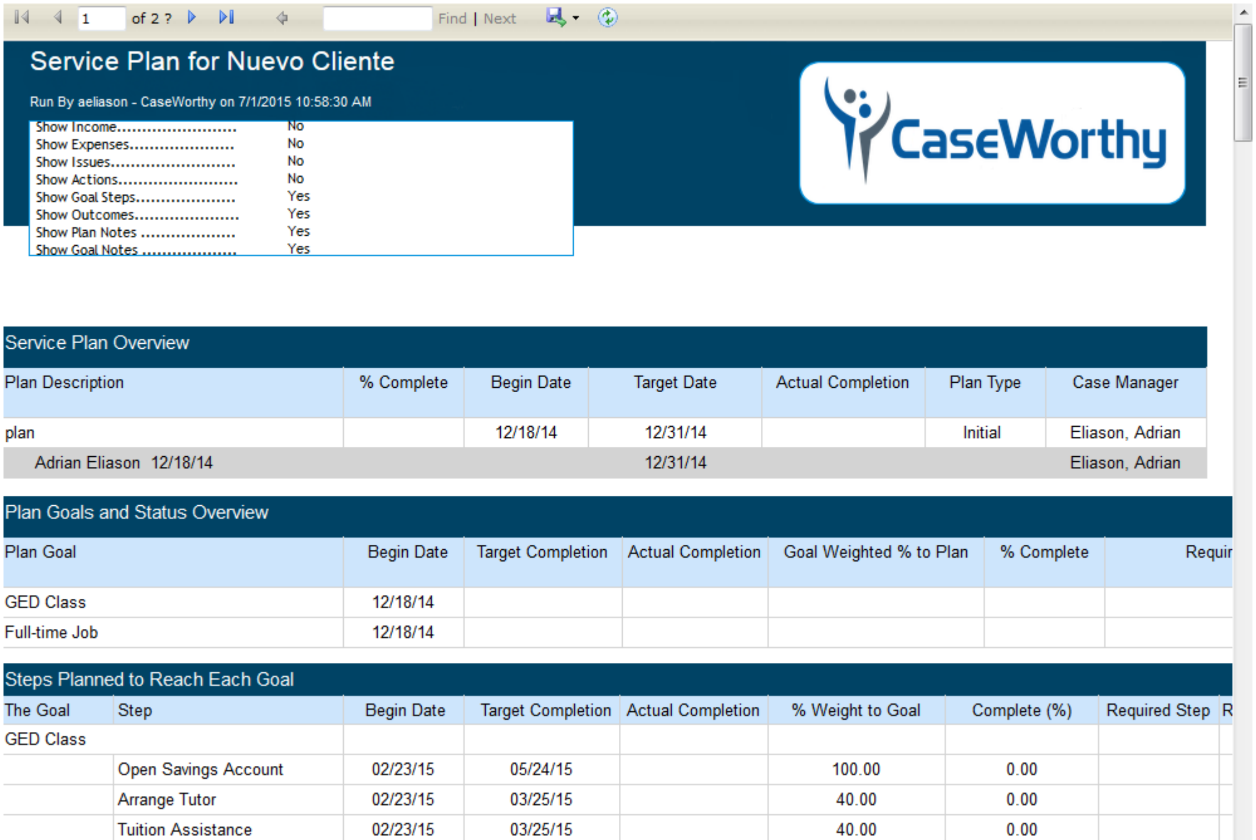
Objective: The Individual Service Plan Summary provides direct access to service plans and can be used to edit or generate reports of any service plans.

To view an expanded service plan report, click the action gear icon associated with it and select Enhanced Service Plan Report from the popup menu that appears. The Service Plan Report form displays.



Select all desired options for the report via the drop-down lists and checkboxes and click Report to generate the report.

The Report displays in a new window.



1 of 2 ? Find | Next

Service Plan for Nuevo Cliente

Run By aeliason - CaseWorthy on 7/1/2015 10:58:30 AM

Show Income........................	No
Show Expenses.....................	No
Show Issues..........................	No
Show Actions........................	No
Show Goal Steps....................	Yes
Show Outcomes.....................	Yes
Show Plan Notes	Yes
Show Goal Notes	Yes

CaseWorthy

Service Plan Overview

Plan Description	% Complete	Begin Date	Target Date	Actual Completion	Plan Type	Case Manager
plan		12/18/14	12/31/14		Initial	Eliason, Adrian
Adrian Eliason 12/18/14			12/31/14			Eliason, Adrian

Plan Goals and Status Overview

Plan Goal	Begin Date	Target Completion	Actual Completion	Goal Weighted % to Plan	% Complete	Requir
GED Class	12/18/14					
Full-time Job	12/18/14					

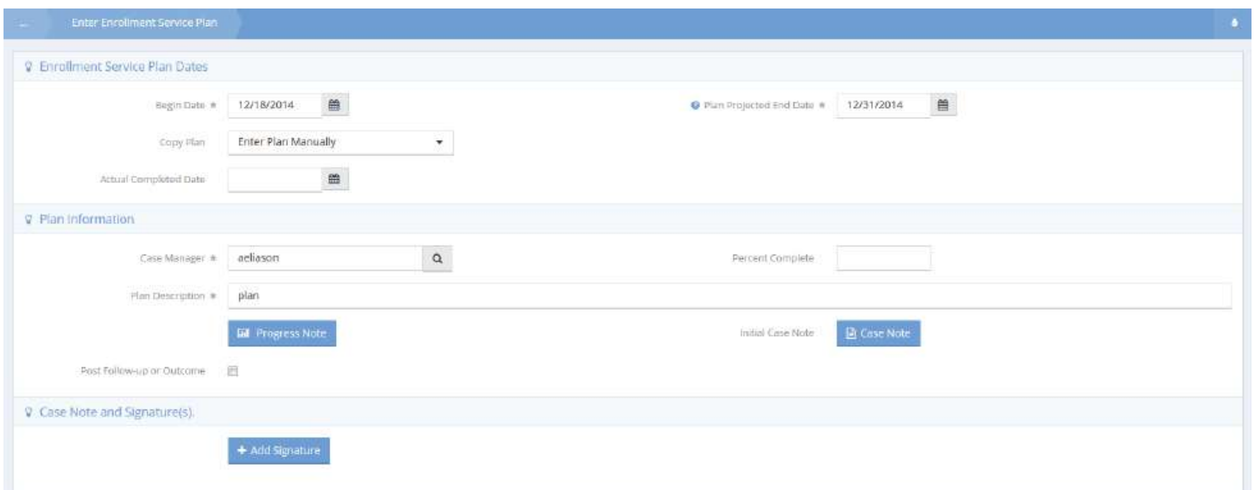
Steps Planned to Reach Each Goal

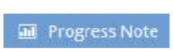
The Goal	Step	Begin Date	Target Completion	Actual Completion	% Weight to Goal	Complete (%)	Required Step	R
GED Class								
	Open Savings Account	02/23/15	05/24/15		100.00	0.00		
	Arrange Tutor	02/23/15	03/25/15		40.00	0.00		
	Tuition Assistance	02/23/15	03/25/15		40.00	0.00		

Case Note with Junction

Objective: Create a progress note for a service plan.

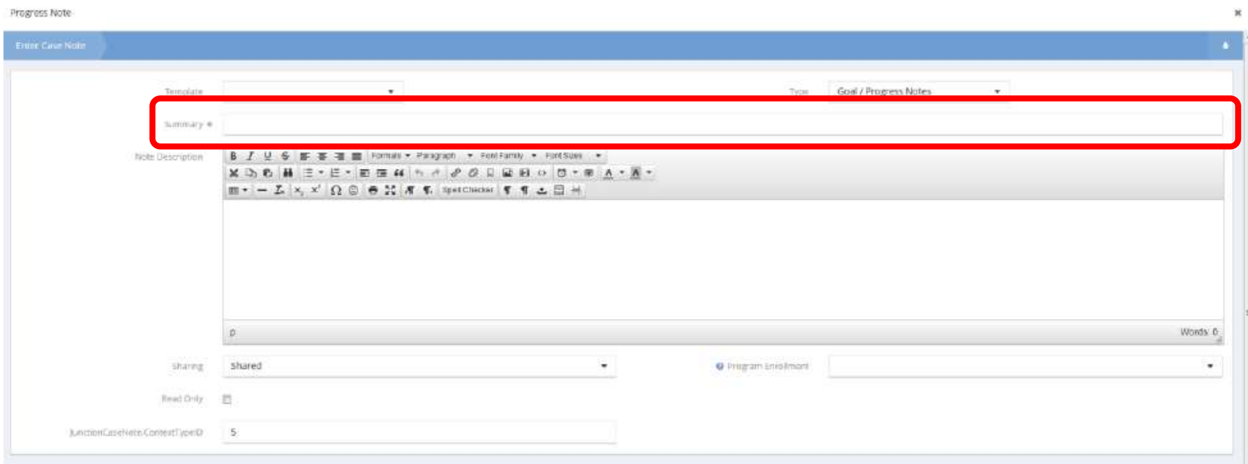
On the desired service plan, click the action gear  icon and click Edit. The Enter Enrollment Service Plan form displays.



Click the 

button. The Progress Note Summary (ISP) form displays.

Click the Add New button. The Case Note with Junction form displays.



Minimally, enter a summary. Add any other available information and click Save when finished.

Service Plan Goal Outcomes

Objective: View and manage outcomes for service plan goals.

The Individual Service Plan Summary displays.


Individual Service Plan Summary

Total Rows: 19

Plan Begin - End Dates	Description	Enrolled Program	Case Manager	% Compl	# of Goals	# of Steps
4/5/2012 - 5/31/2013	2nd Service Plan Review Option	21 Tenant-based Rental Assistance (TRA)	Bingel, Brian		0	0
4/5/2012 - 4/30/2012	Test Plan #2	Adult Education	Bingel, Brian		0	0
4/5/2012 - 6/28/2012	Test Plan #3	21 Tenant-based Rental Assistance (TRA)	Bingel, Brian	7	0	0
4/23/2012 - 6/30/2012	This is the service plan description	12 Permanent Housing for Homeless Disabled	Bingel, Brian	7	1	105
2/5/2013 - 2/28/2014	Employment Service Plan	21 Tenant-based Rental Assistance (TRA)	Beck, Cameron	12	3	224
2/5/2013 - 2/4/2014	adsf	21 Tenant-based Rental Assistance (TRA)	Bingel, Brian		0	0
3/1/2013 - 3/31/2013	This is my test plan Desc.	Little City Program	Bingel, Brian		3	224
5/13/2013 - 6/30/2013	yt7 yhikhk cdra	_CEAP / Utility Assistance	Tjoe, Jane		3	171
10/3/2013 - 10/3/2013	lkj;kpo;k	2 YAGA	Tjoe, Jane		1	105
8/19/2014 - 8/31/2014	Test	Employment Job Match Program	, Administrator		0	0

For outcomes, click the action gear icon and click Outcomes. The Service Plan Outcomes form displays.


Individual Service Plan Summary

Total Rows: 19

- Edit
- Goals and Steps
- View Notes
- Outcomes
- Service Plan Report
- Plan History
- Enhanced Service Plan Report

Plan Begin - End Dates	Description	Enrolled Program	Case Manager	% Compl	# of Goals	# of Steps
	2nd Service Plan Review Option	21 Tenant-based Rental Assistance (TRA)	Bingel, Brian		0	0
	Test Plan #2	Adult Education	Bingel, Brian		0	0
	Test Plan #3	21 Tenant-based Rental Assistance (TRA)	Bingel, Brian	7	0	0
	This is the service plan description	12 Permanent Housing for Homeless Disabled	Bingel, Brian	7	1	105
	Employment Service Plan	21 Tenant-based Rental Assistance (TRA)	Beck, Cameron	12	3	224
2/5/2013 - 2/4/2014	adsf	21 Tenant-based Rental Assistance (TRA)	Bingel, Brian		0	0

Any outcomes display in the spreadsheet.

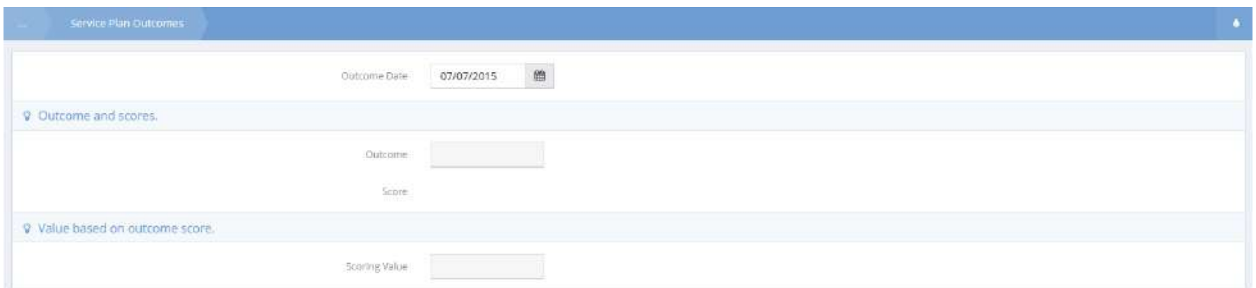

Service Plan Outcomes

Total Rows: 2

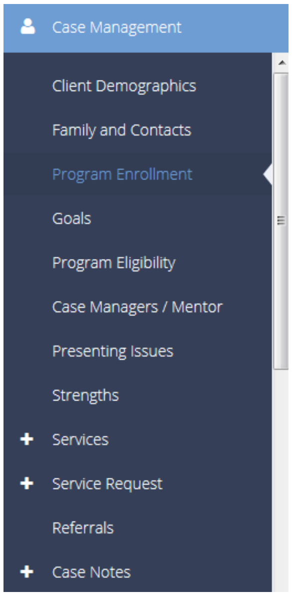
Outcome Date/Time	Outcome	Score Short Description	Scoring Value
2/20/2012 12:00 AM	Adult Education	Has high school diploma/GED	1.00
2/20/2012 12:00 AM	Adult Education	Has high school diploma/GED	1.00

To view or edit details, click the action gear icon and click Edit.

Any relevant values can be edited. Click Save when finished.

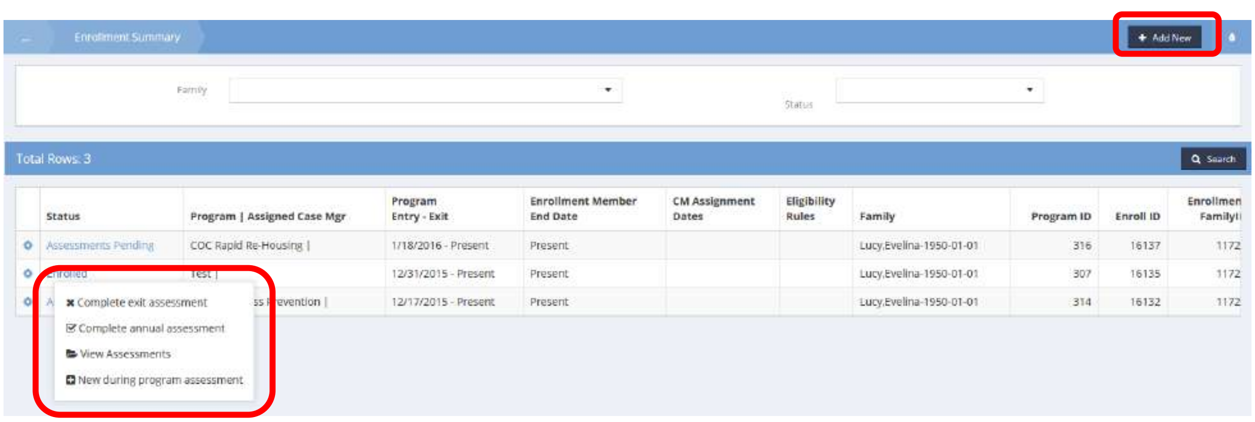


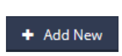
Program Enrollment



The third Case Management menu item is the "Program Enrollment" summary form. From this form, the user can view a client's current and past program enrollments. The Family field allows the user to distinguish enrollments between multiple families. The drop-down list at the top of the form includes all families to which the client belongs and is used to filter enrollments by selecting the desired family.

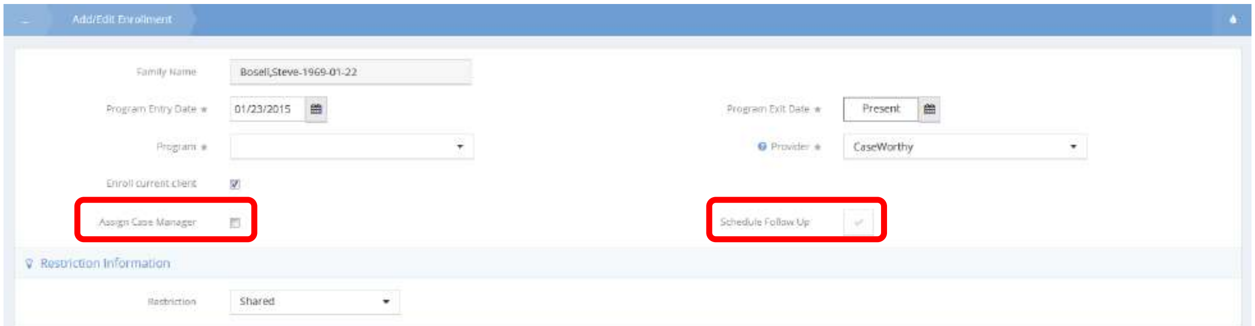
If a client is enrolled in a program and is ready to exit that program, click on the words "Enrolled in Program" then click "Complete exit assessment." The user can also "View Assessments" or click "New during program assessment" to create new ones. If a client's status is "Assessments Pending," click on the status and select "Complete entry assessment" to fully enroll the client in the program.



To add a new enrollment, click the 

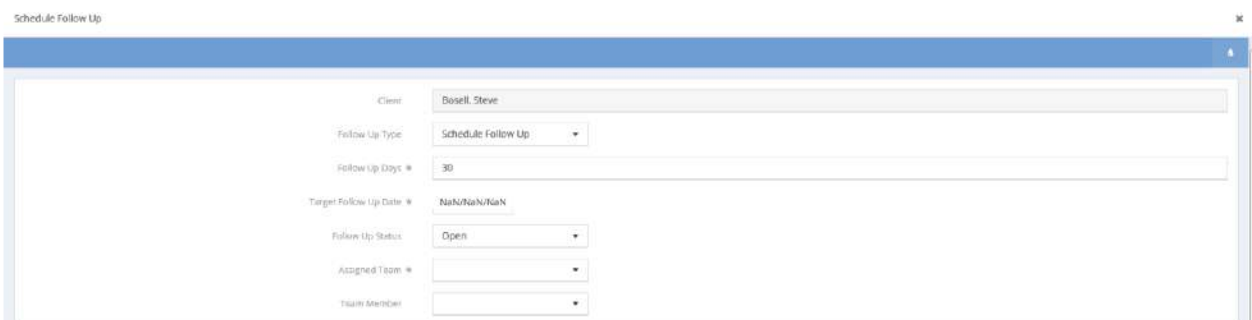
button in the top right corner.

The Add/Edit Enrollment form displays.



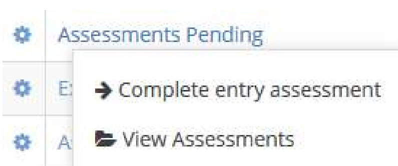
Select a program and provider. If all the services provided in this program are paid for from one account, it is possible to tie that account directly to the enrollment here. By clicking the checkbox at the bottom, the user can assign a case manager.

The user can schedule an enrollment follow up appointment by clicking on the “Schedule Follow Up” check box. A pop-up window appears.

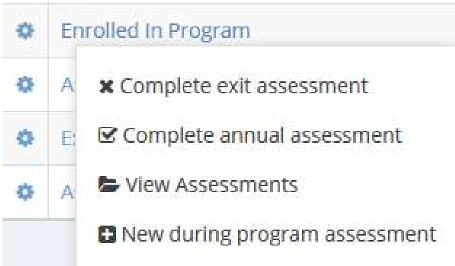


By entering the number of days, the follow-up date automatically calculates. Complete the relevant/required information and click Update to save the form. This posts a follow-up record to the assigned team and/or team member which can be viewed and managed from the My CaseWorthy™ menu.

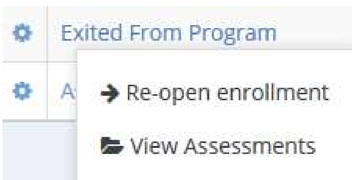
Once an enrollment has been entered, the user can click on the enrollment status to complete tasks related to the enrollment. If the enrollment status is “Assessments Pending” the user can launch a workflow to complete the required exit assessments.



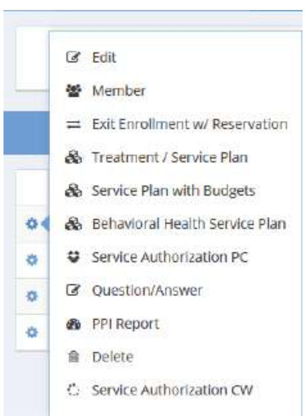
If the status is “Enrolled in Program” the user can launch workflows to complete “during program” assessments or to exit all enrolled family members.



If the status is “Exited from Program” the user can access a link to re-open the enrollment.



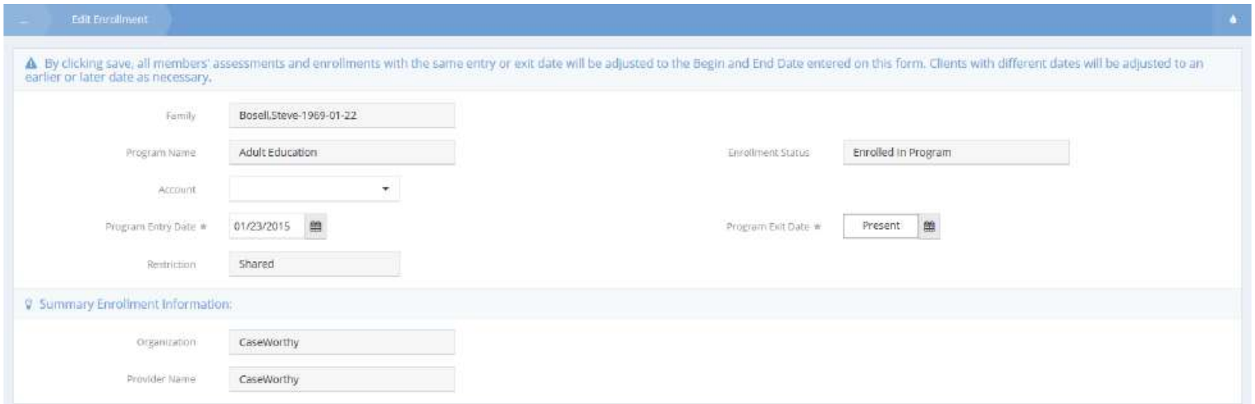
From the action gear icon, the user can edit the enrollment, or access many different enrollment related features.



The user can add family members to the enrollment, add a service plan specific to the enrollment, exit an enrollment and classroom or housing reservation in a workflow, answer specific enrollment related questions, or access the client Personal Protected Information report which summarizes the client’s enrollment related data.

The following forms appear when the choices are selected.

Edit

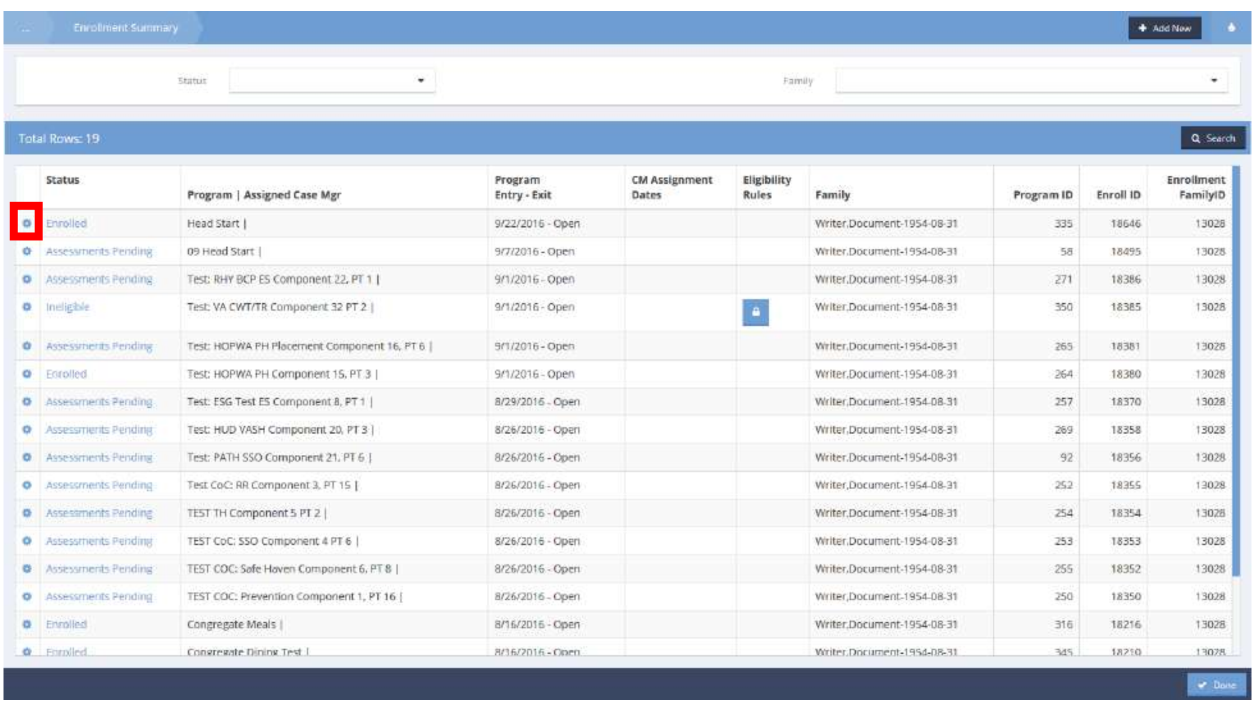


Member

Objective: Assign a case manager to a client based on program enrollment.

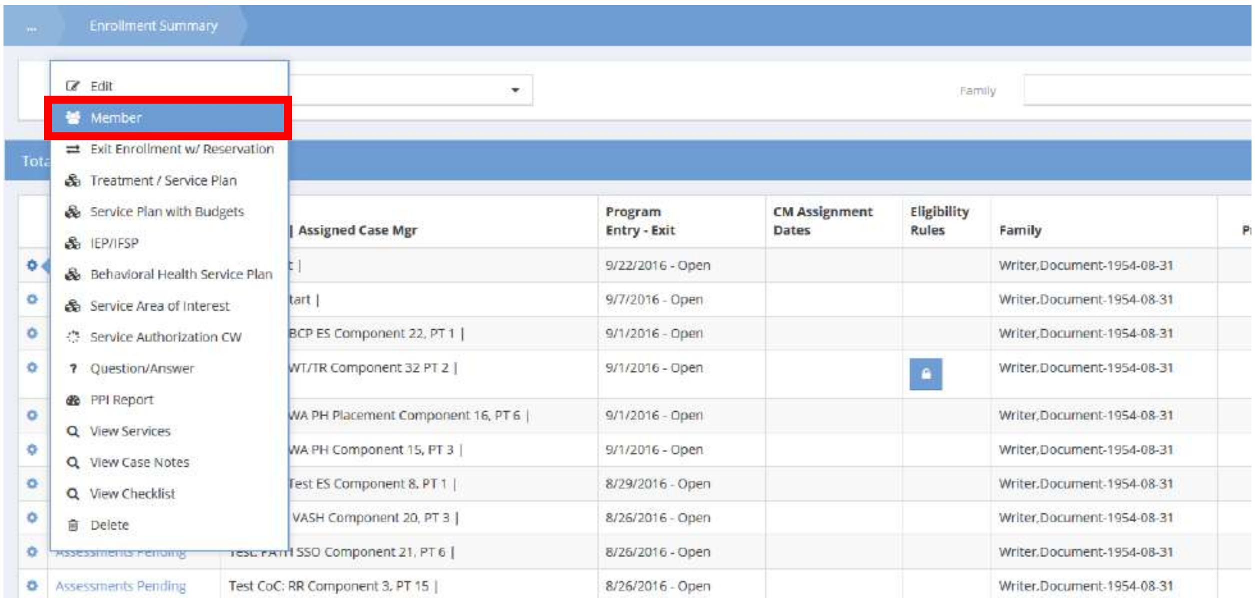
Navigation: Case Management>Case Management>Program Enrollment

The Enrollment Summary form displays.

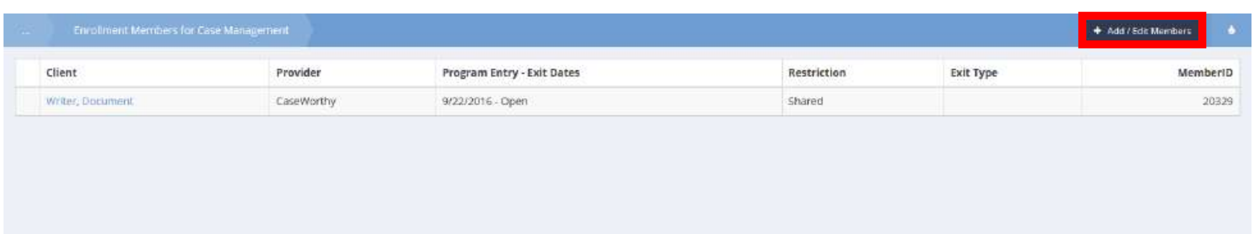


Status	Program | Assigned Case Mgr	Program Entry - Exit	CM Assignment Dates	Eligibility Rules	Family	Program ID	Enroll ID	Enrollment FamilyID
Enrolled	Head Start |	9/22/2016 - Open			Writer,Document-1954-08-31	335	18646	13028
Assessments Pending	09 Head Start |	9/7/2016 - Open			Writer,Document-1954-08-31	58	18495	13028
Assessments Pending	Test: RHY BCP ES Component 22, PT 1 |	9/1/2016 - Open			Writer,Document-1954-08-31	271	18386	13028
Ineligible	Test: VA CWT/TR Component 32 PT 2 |	9/1/2016 - Open			Writer,Document-1954-08-31	350	18385	13028
Assessments Pending	Test: HOPWA PH Placement Component 16, PT 6 |	9/1/2016 - Open			Writer,Document-1954-08-31	265	18381	13028
Enrolled	Test: HOPWA PH Component 15, PT 3 |	9/1/2016 - Open			Writer,Document-1954-08-31	264	18380	13028
Assessments Pending	Test: ESG Test ES Component 8, PT 1 |	8/29/2016 - Open			Writer,Document-1954-08-31	257	18370	13028
Assessments Pending	Test: HUD VASH Component 20, PT 3 |	8/26/2016 - Open			Writer,Document-1954-08-31	269	18358	13028
Assessments Pending	Test: PATH SSO Component 21, PT 6 |	8/26/2016 - Open			Writer,Document-1954-08-31	92	18356	13028
Assessments Pending	Test CoC: RR Component 3, PT 15 |	8/26/2016 - Open			Writer,Document-1954-08-31	252	18355	13028
Assessments Pending	TEST TH Component 5 PT 2 |	8/26/2016 - Open			Writer,Document-1954-08-31	254	18354	13028
Assessments Pending	TEST CoC: SSO Component 4 PT 6 |	8/26/2016 - Open			Writer,Document-1954-08-31	253	18353	13028
Assessments Pending	TEST COC: Safe Haven Component 6, PT 8 |	8/26/2016 - Open			Writer,Document-1954-08-31	255	18352	13028
Assessments Pending	TEST COC: Prevention Component 1, PT 16 |	8/26/2016 - Open			Writer,Document-1954-08-31	250	18350	13028
Enrolled	Congregate Meals |	8/16/2016 - Open			Writer,Document-1954-08-31	316	18216	13028
Enrolled	Congregate Dining Test |	8/16/2016 - Open			Writer,Document-1954-08-31	345	18210	13028

Click the action gear icon associated with desired program and select Member from the menu options.

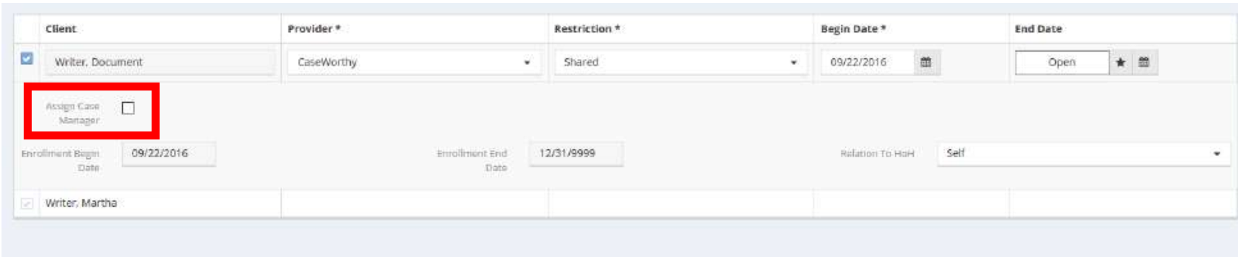


The Enrollment Members for Case Management form displays.

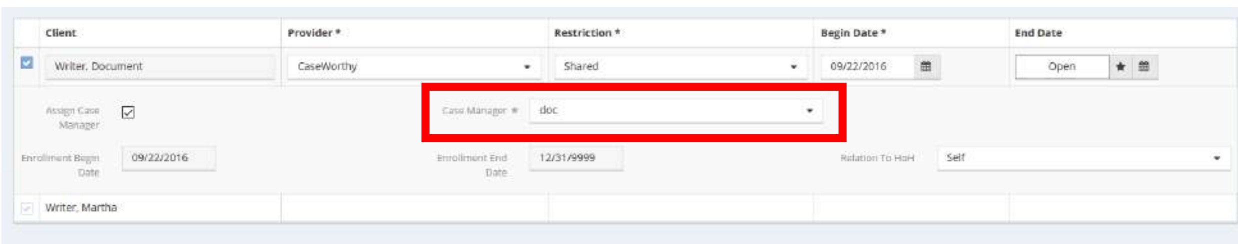


Click the **+ Add / Edit Members** button. The Enrollment Members form displays.

Click the blue checkbox icon associated with the desired enrolled client to assign a case manager. The row expands for editing.



Click the Assign Case Manager checkbox. The Case Manager field appears

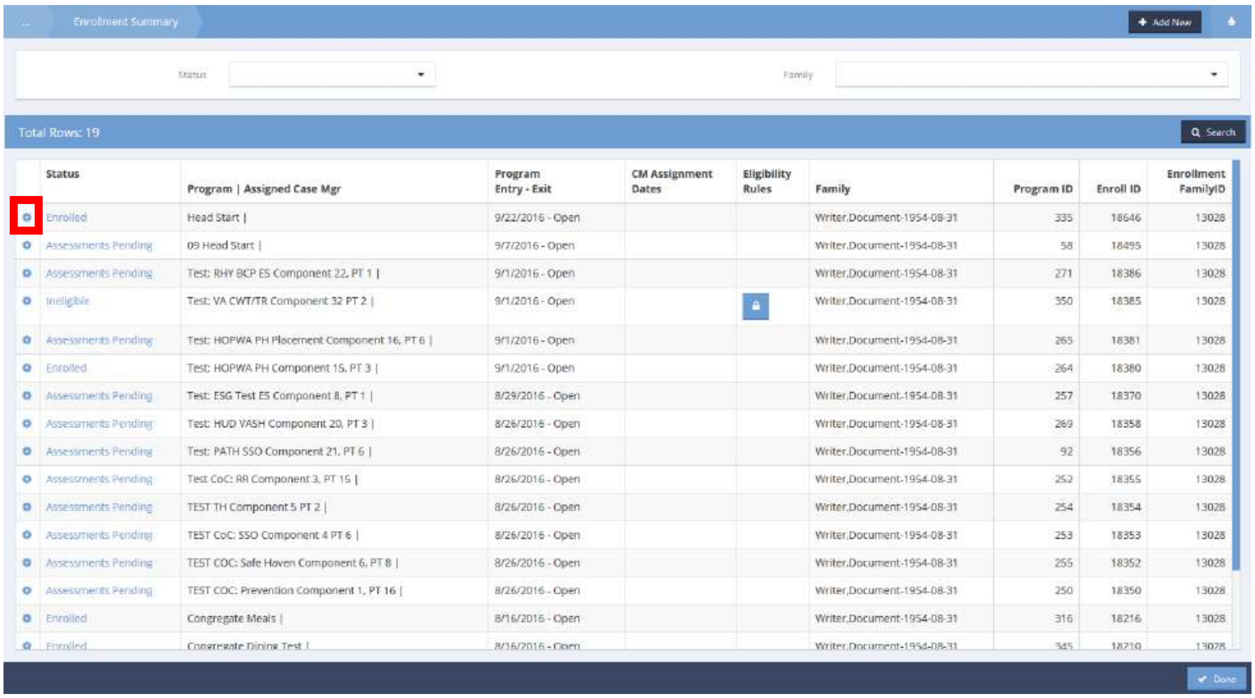


Select the appropriate user to be assigned as the case manager. If multiple family members are enrolled, repeat this process for each family member as desired. Click the Save button to save and exit.

Define Program Enrollment Exit Date

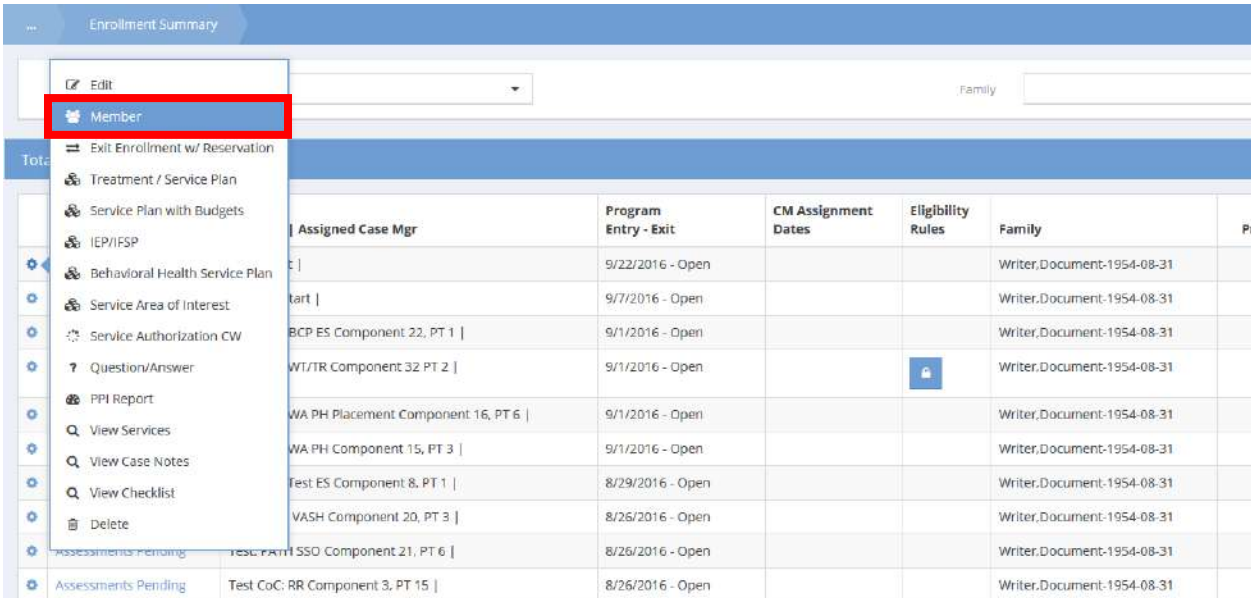
Objective: Define an exit date for a specific client enrollment.

Navigation: Case Management>Case Management>Program Enrollment Member
The Enrollment Summary form displays.



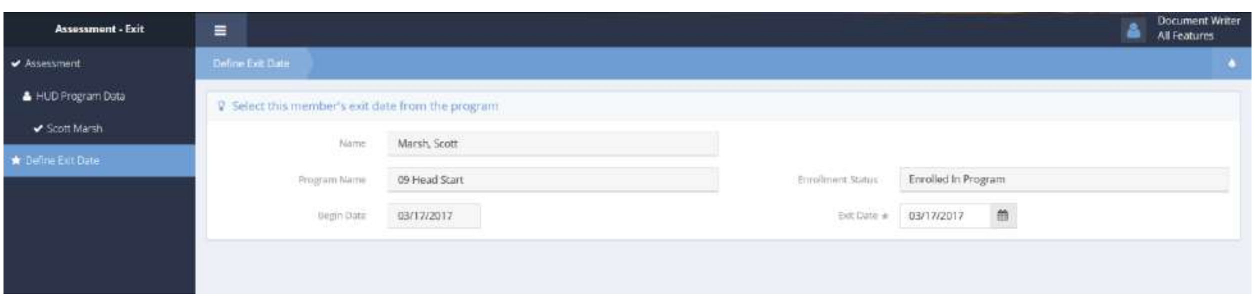
Status	Program | Assigned Case Mgr	Program Entry - Exit	CM Assignment Dates	Eligibility Rules	Family	Program ID	Enroll ID	Enrollment FamilyID
Enrolled	Head Start |	9/22/2016 - Open			Writer,Document-1954-08-31	335	18646	13028
Assessments Pending	09 Head Start |	9/7/2016 - Open			Writer,Document-1954-08-31	58	18495	13028
Assessments Pending	Test: RHY BCP ES Component 22, PT 1 |	9/1/2016 - Open			Writer,Document-1954-08-31	271	18386	13028
Ineligible	Test: VA CWT/TR Component 32 PT 2 |	9/1/2016 - Open			Writer,Document-1954-08-31	350	18385	13028
Assessments Pending	Test: HOPWA PH Placement Component 16, PT 6 |	9/1/2016 - Open			Writer,Document-1954-08-31	265	18381	13028
Enrolled	Test: HOPWA PH Component 15, PT 3 |	9/1/2016 - Open			Writer,Document-1954-08-31	264	18380	13028
Assessments Pending	Test: ESG Test ES Component 8, PT 1 |	8/29/2016 - Open			Writer,Document-1954-08-31	257	18370	13028
Assessments Pending	Test: HUD VASH Component 20, PT 3 |	8/26/2016 - Open			Writer,Document-1954-08-31	269	18358	13028
Assessments Pending	Test: PATH SSO Component 21, PT 6 |	8/26/2016 - Open			Writer,Document-1954-08-31	92	18356	13028
Assessments Pending	Test CoC: RR Component 3, PT 15 |	8/26/2016 - Open			Writer,Document-1954-08-31	252	18355	13028
Assessments Pending	TEST TH Component 5 PT 2 |	8/26/2016 - Open			Writer,Document-1954-08-31	254	18354	13028
Assessments Pending	TEST CoC: SSO Component 4 PT 6 |	8/26/2016 - Open			Writer,Document-1954-08-31	253	18353	13028
Assessments Pending	TEST COC: Safe Haven Component 6, PT 8 |	8/26/2016 - Open			Writer,Document-1954-08-31	255	18352	13028
Assessments Pending	TEST COC: Prevention Component 1, PT 16 |	8/26/2016 - Open			Writer,Document-1954-08-31	250	18350	13028
Enrolled	Congregate Meals |	8/16/2016 - Open			Writer,Document-1954-08-31	316	18216	13028
Enrolled	Congregate Dining Test |	8/16/2016 - Open			Writer,Document-1954-08-31	345	18210	13028

Click the action gear icon associated with desired program and select Member from the menu options.



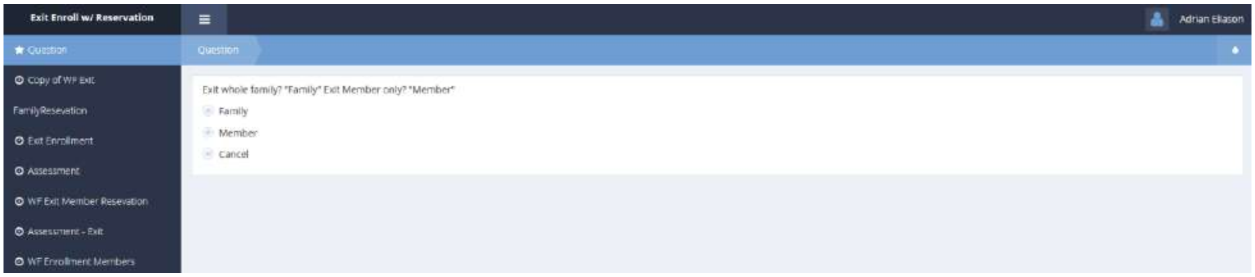
The enrollment Members for Case Management form displays.

Click the name hypertext associated with the desired enrollment and select Complete Exit Assessment from the menu options. The Assessment – Exit workflow displays. The last form of the workflow is the Define Exit Date form.



The only field on this form available for edit is the Exit Date field. Enter the desired exit date and save to close. This simply updates the exit date for that enrollment.

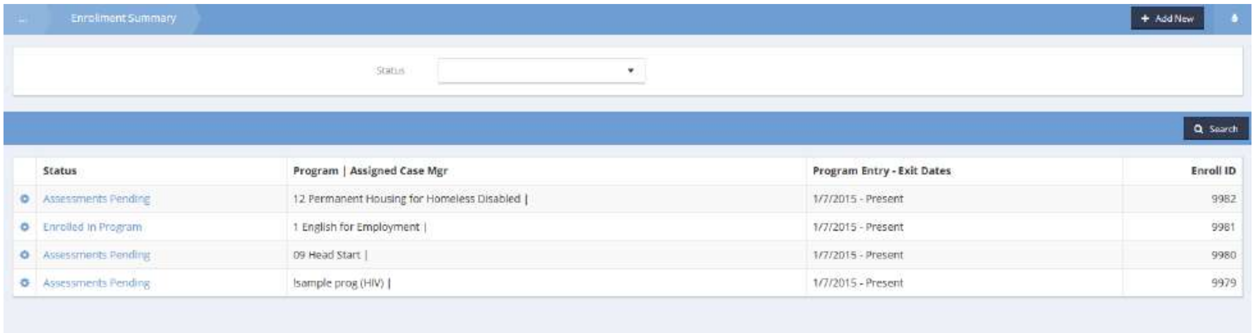
Exit Enrollment w/ Reservation



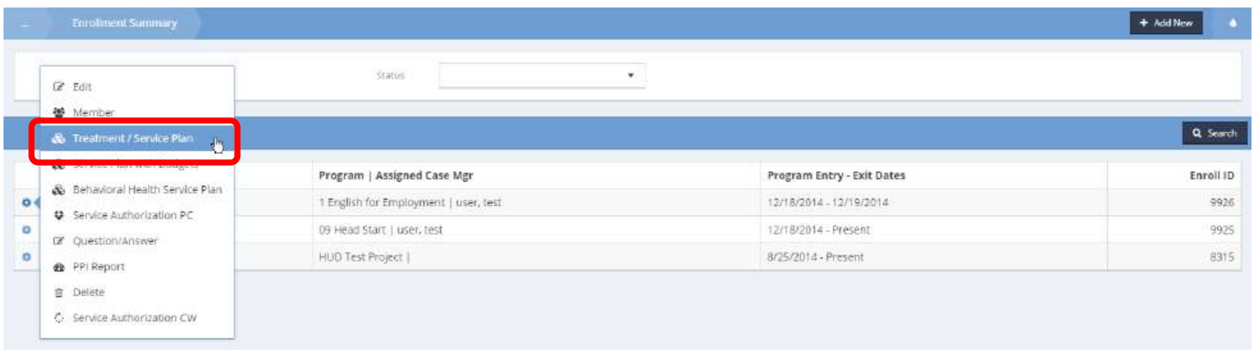
Treatment/Service Plan

Goals

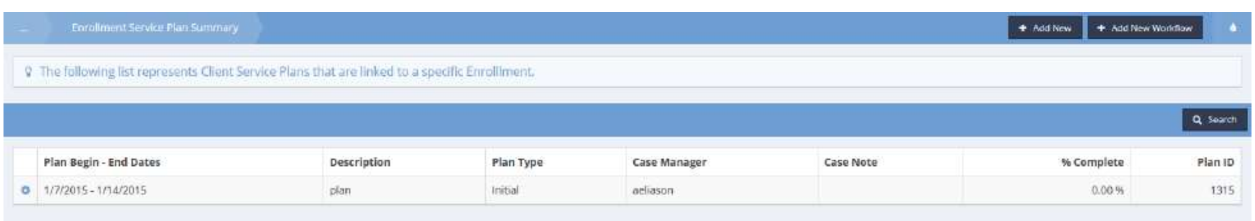
Objective: View or edit goals for a service plan.



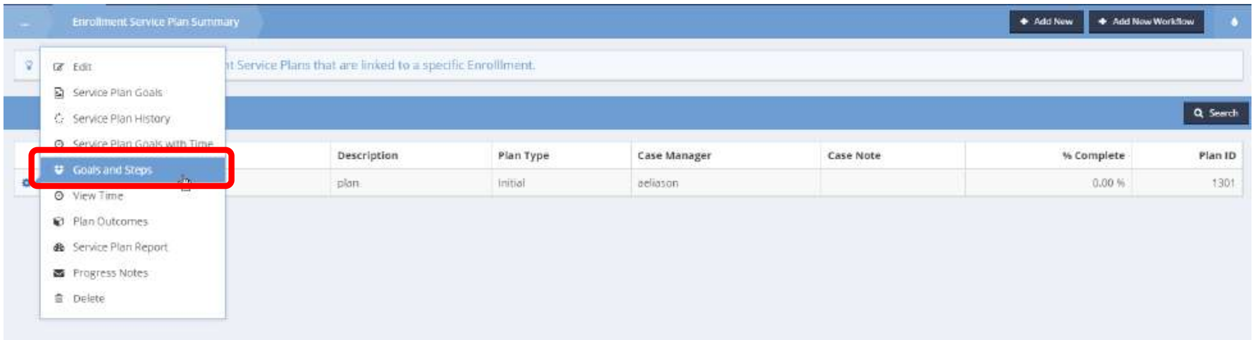
From the Enrollment Summary form, click the action gear icon associated with the desired program and select Treatment / Service Plan from the pop up menu that appears. (For this functionality, any service plan can be selected.)



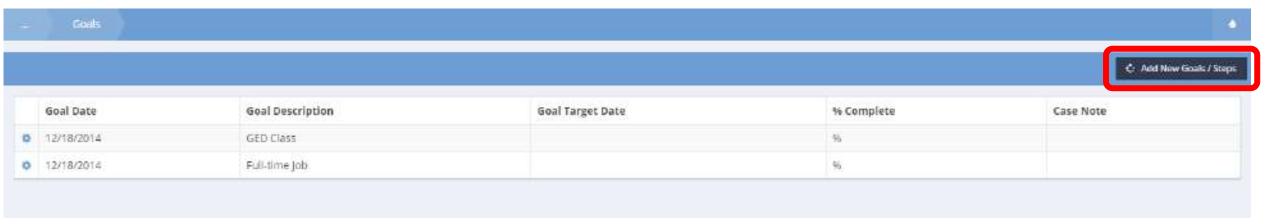
The Enrollment Service Plan Summary form opens.



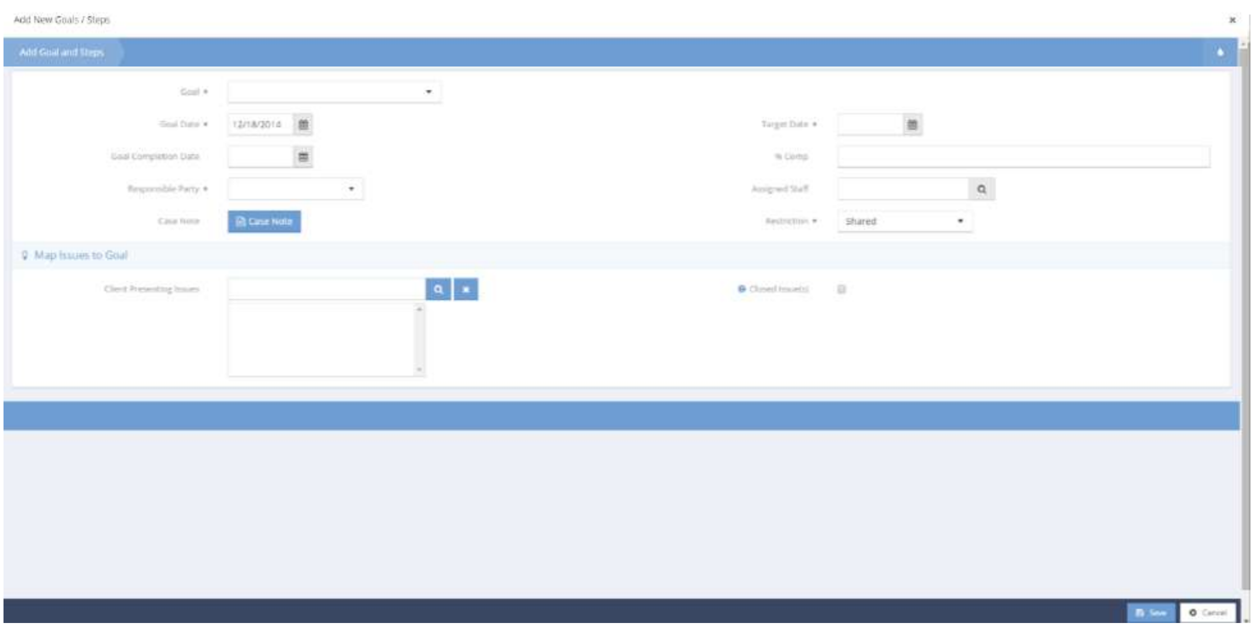
Click the action gear icon for the desired service plan and select Goals and Steps from the pop up menu that appears.



The service plan Goals form displays.



To add new goals and steps, click the Add New Goals & Steps button. The Add New Goals / Steps form displays.

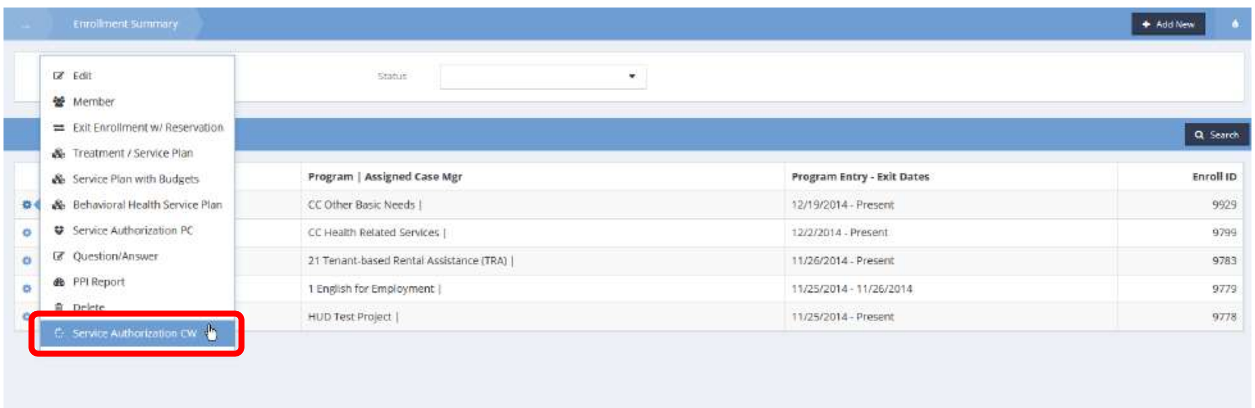


Enter all required fields and click Save when finished.

Service Authorization CW

Objective: View, edit, or add new Service Authorizations for a program.

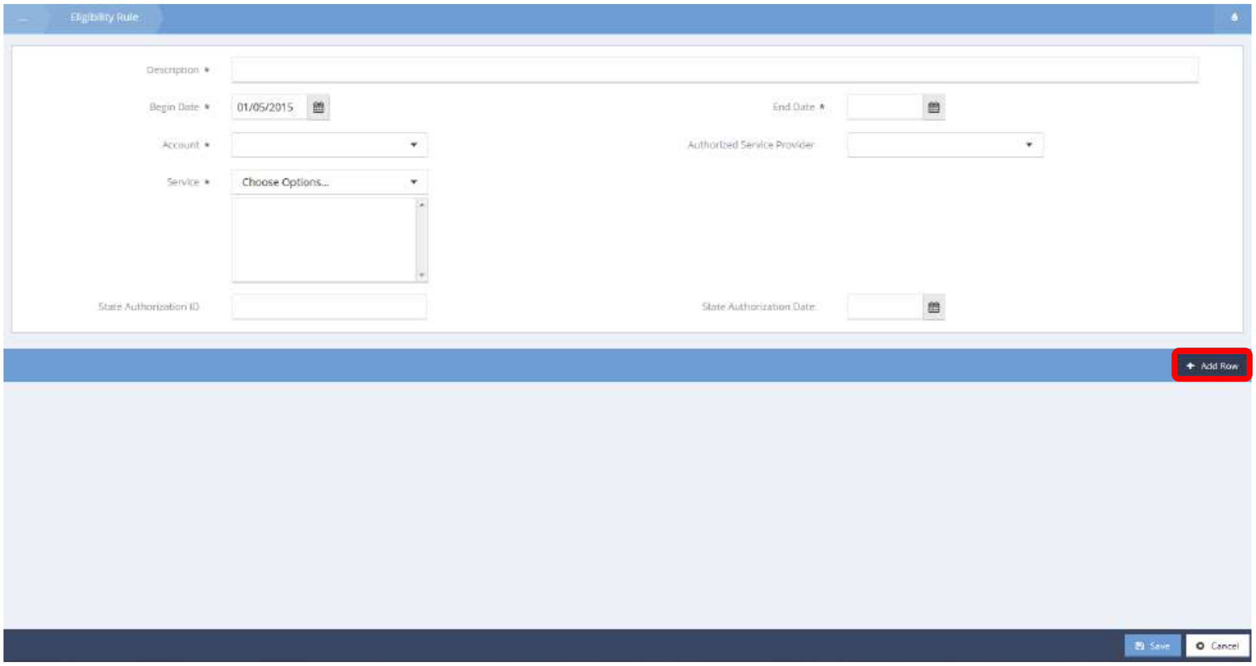
On the Enrollment Summary form, click the action gear associated with the desired program and select Service Authorization CW from the pop up menu that appears.



The Service Authorization CW Summary form displays.

Click the + Add New button.

The Eligibility Rule form displays.



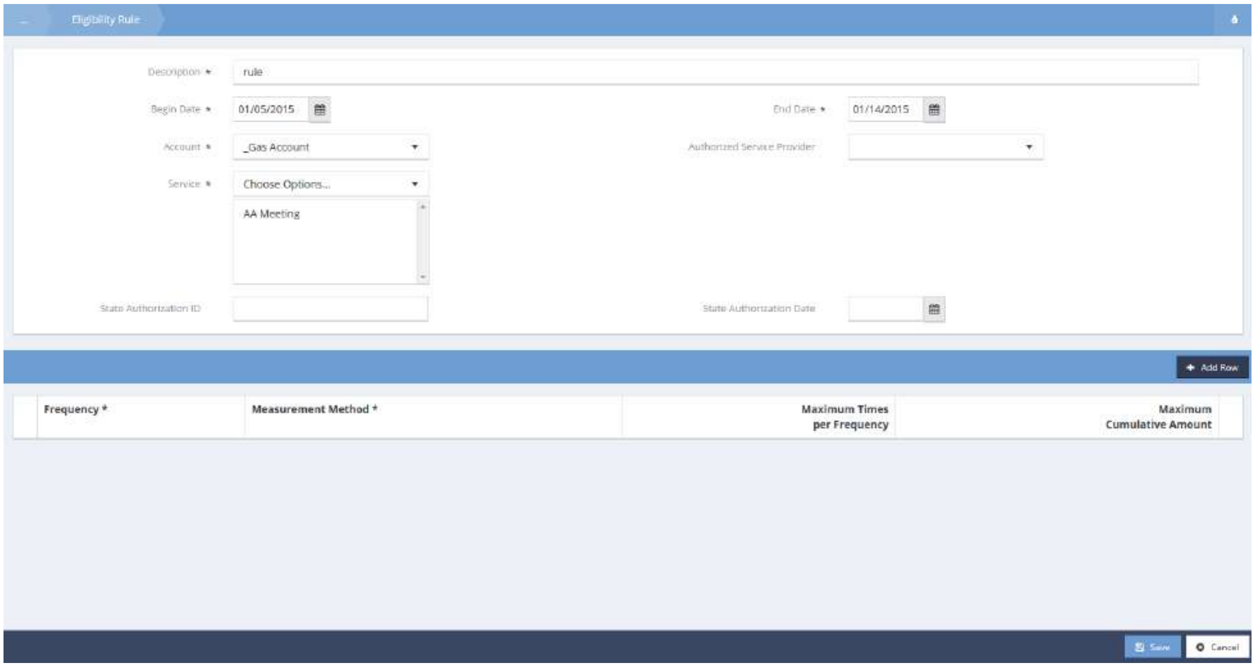
Fill out the necessary fields. Click the + Add Row button.

A row appears in the spreadsheet below.

In the new row, select a measurement method, frequency and maximum times per frequency if applicable. Click the Save button when finished.

To edit, click the action gear associated with the desired service authorization and select Edit from the pop up menu that appears.

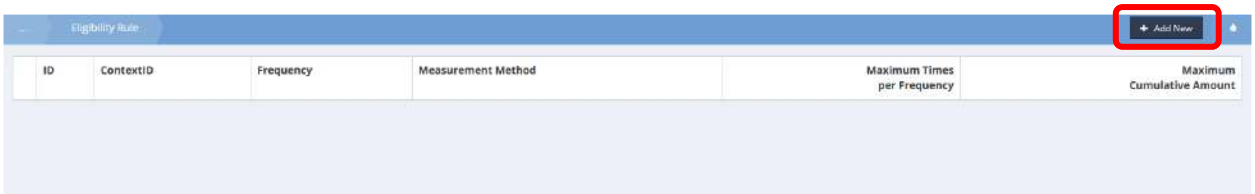
The Eligibility Rule form displays.



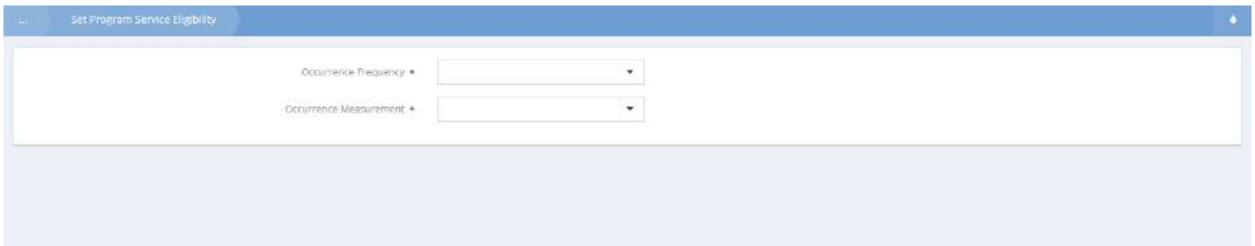
Make any changes and click Save when finished. The Service Authorization CW Summary form displays.

To add or edit eligibility rules click the action gear associated with the desired service authorization and select Eligibility Rule from the pop up menu that appears.

The Authorization Eligibility Rule form displays.



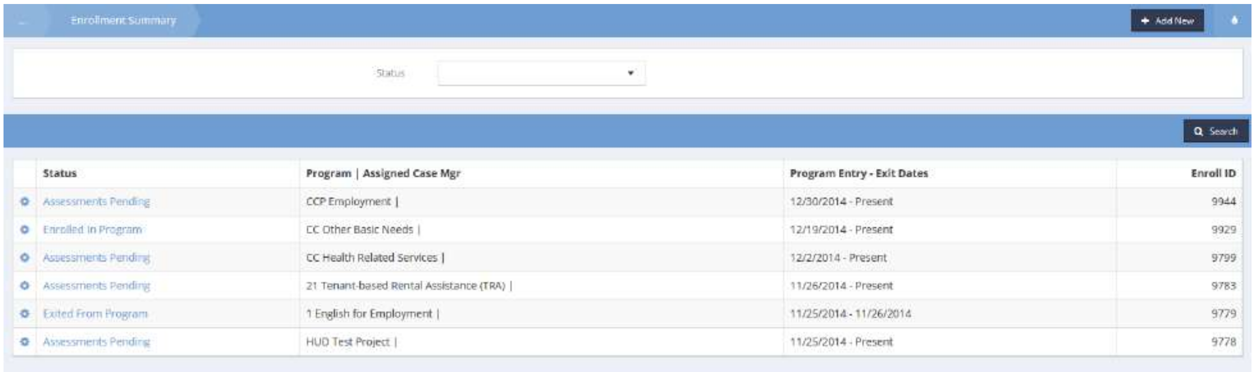
Click the **+ Add New** button. The Set Program Service Eligibility form displays.



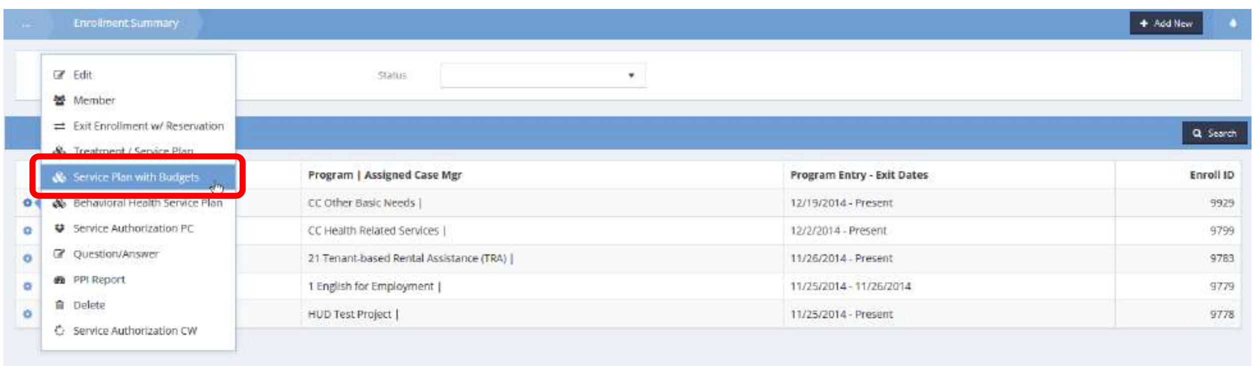
Choose an occurrence frequency and measurement. Depending on the choice in measurement, fields for maximum times and maximum amounts appear and must be entered. Click **Save** when finished.

Post Plan Outcomes

Objective: Add post plan outcomes to a service plan.

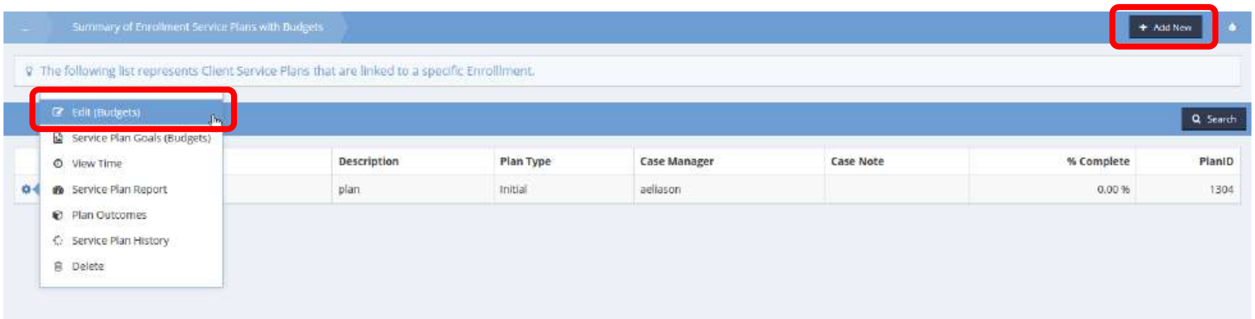


On the Enrollment Summary form, click the action gear associated with the desired program and select Service Plan with Budgets from the pop up menu that appears.

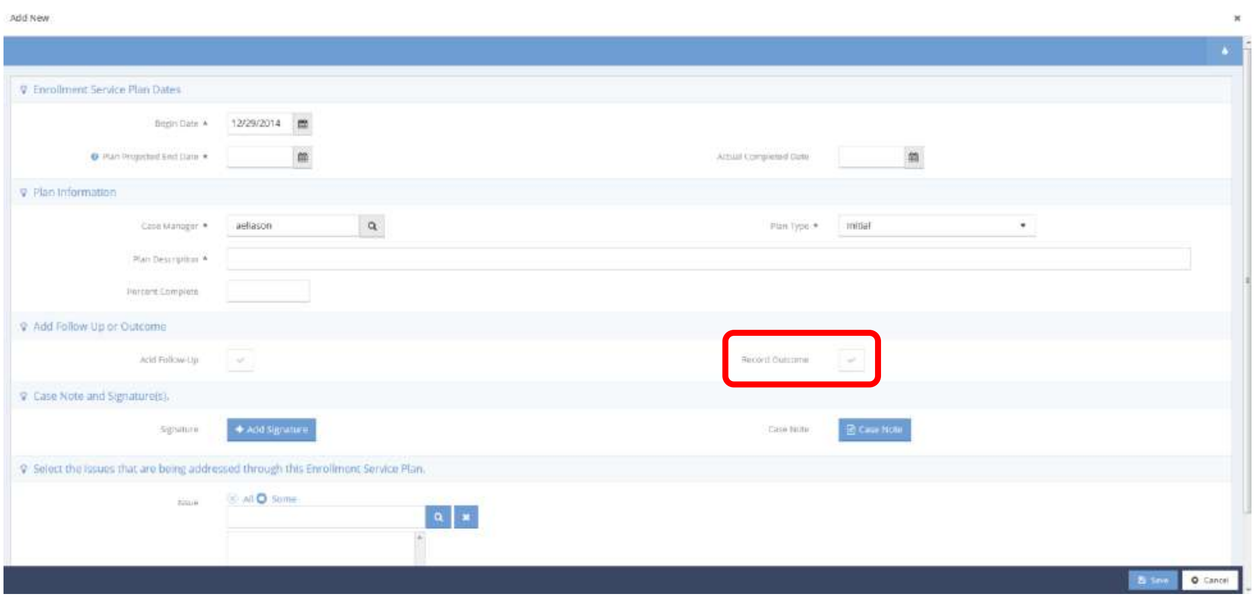


The Summary of Enrollment Service Plans with Budgets form displays.

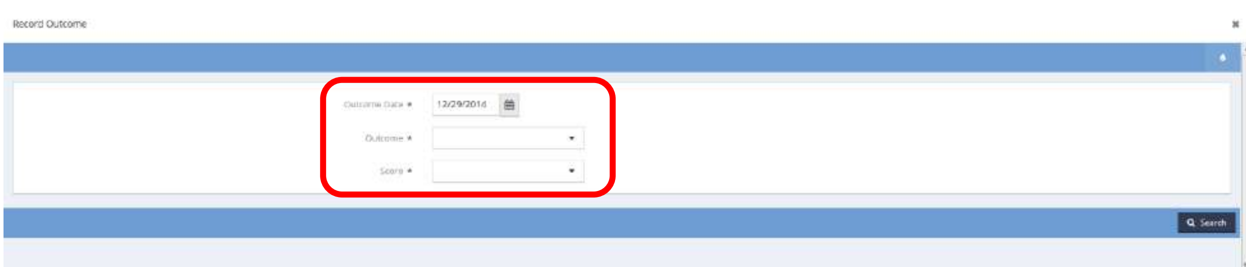
If adding outcomes to a new plan click the Add New button. If adding outcomes to an existing plan, click the action gear icon associated with it and select Edit (Budgets) from the pop up menu that appears.



The Add New form opens in a new window.



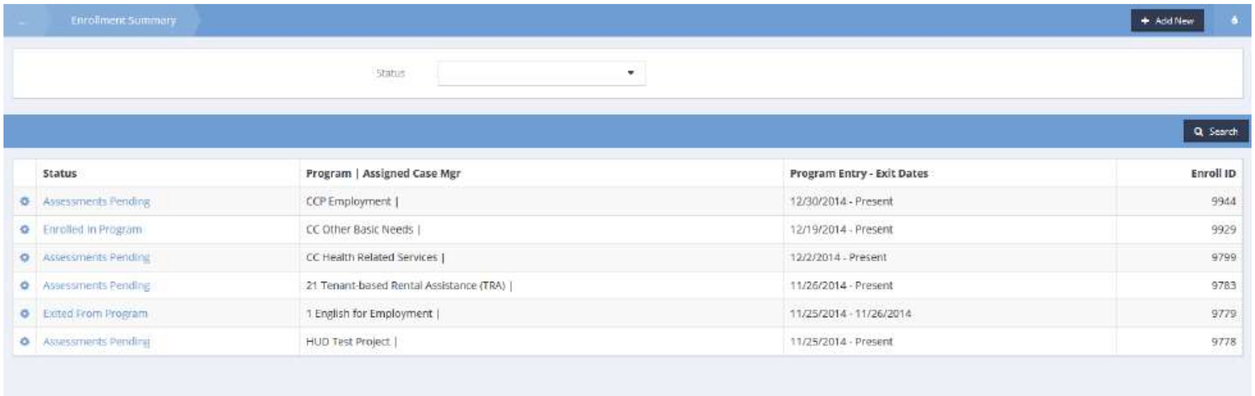
Click the checkbox for Record Outcome. The Post Plan Outcomes form displays.



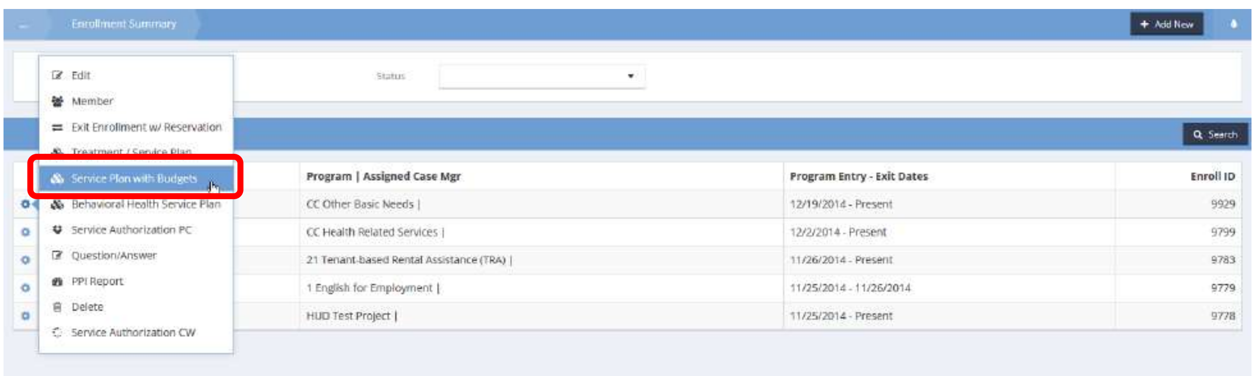
Select an outcome and score from the drop-down lists and click Update when finished.

Service Plan Outcomes

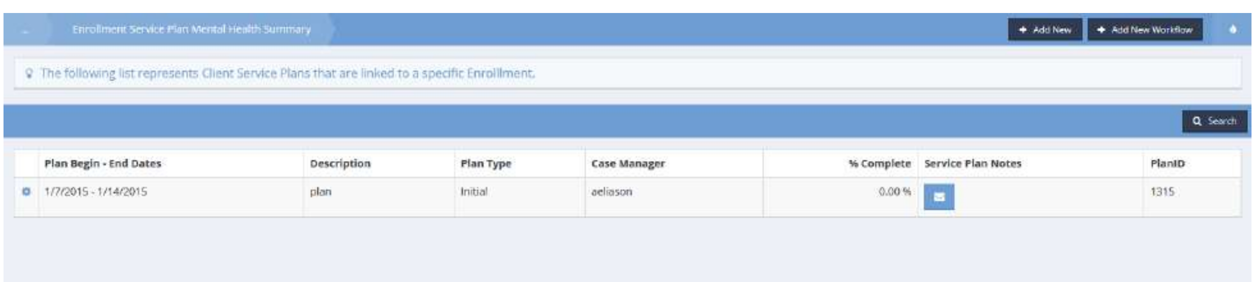
Objective: Add outcomes to a service plan.



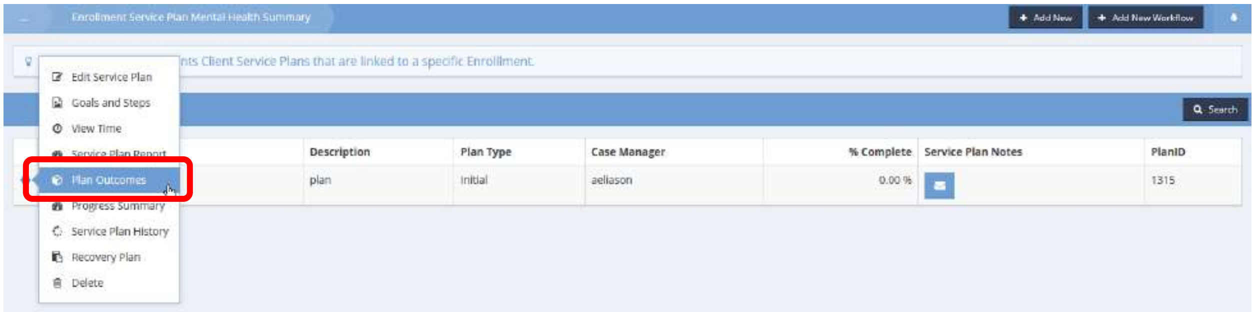
On the Enrollment Summary form, click the action gear associated with the desired program and select Service Plan with Budgets from the pop up menu that appears.



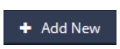
The Enrollment Service Plan Mental Health Summary form displays.



Click on the action gear  icon associated with the desired service plan and select Plan Outcomes from the pop up menu that appears.



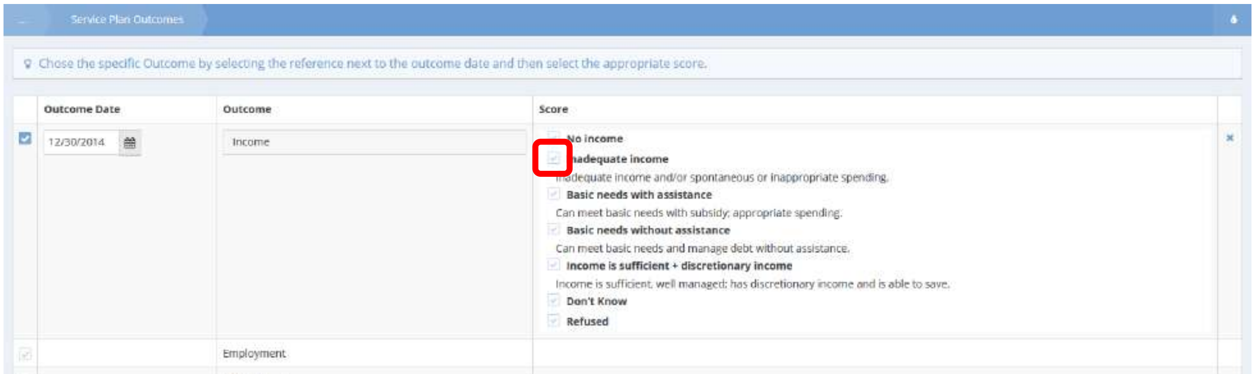
The Service Plan Outcomes Summary displays.

Click the 

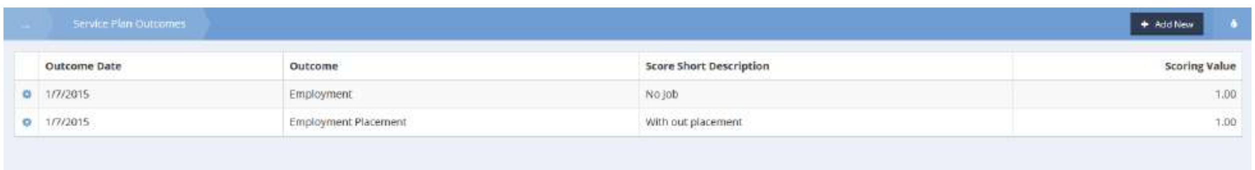
button. The Service Plan Outcomes form displays.

Click the clear checkbox next to an outcome.

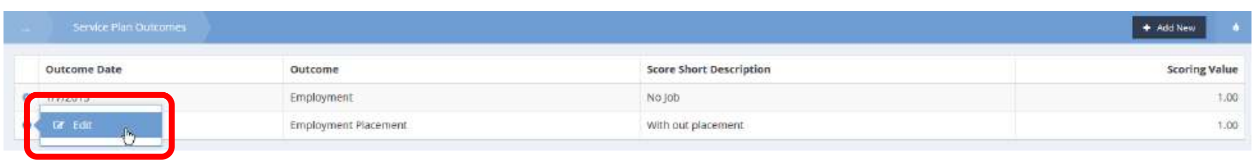
The row expands.



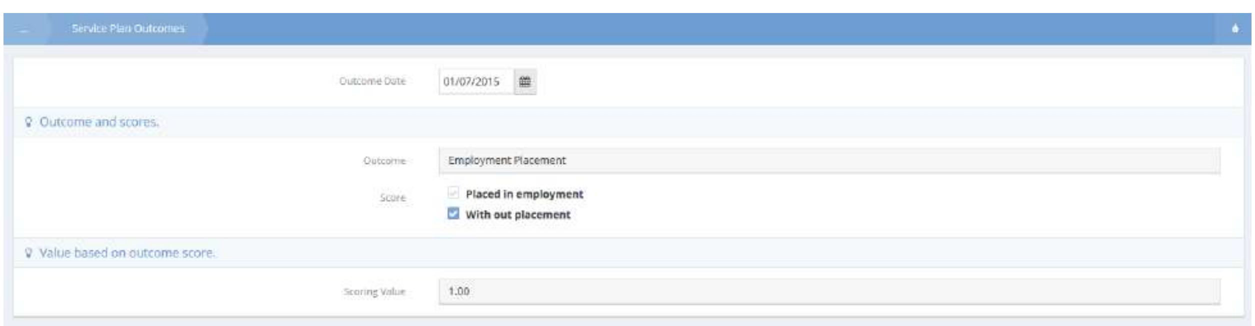
Choose a date and give a score by clicking a clear checkbox next to one of the choices in the Score column. Click Save when finished. The Service Plan Outcomes Summary form displays.



To edit an outcome, click the action gear icon associated with the desired outcome and select Edit from the pop up menu that appears.

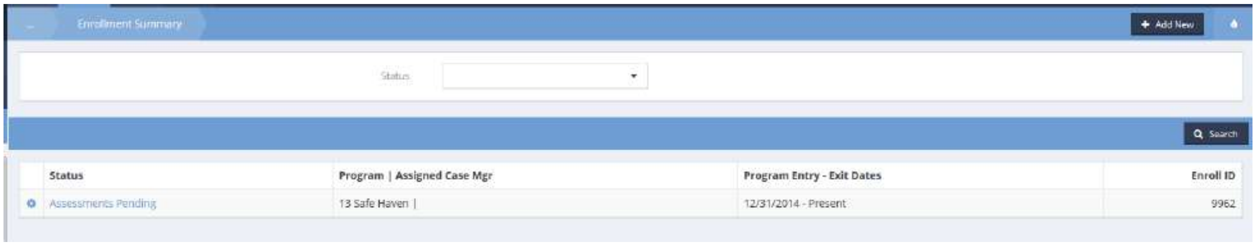


The Edit Service Plan Outcomes Summary form displays. Make any changes and click Save when finished.

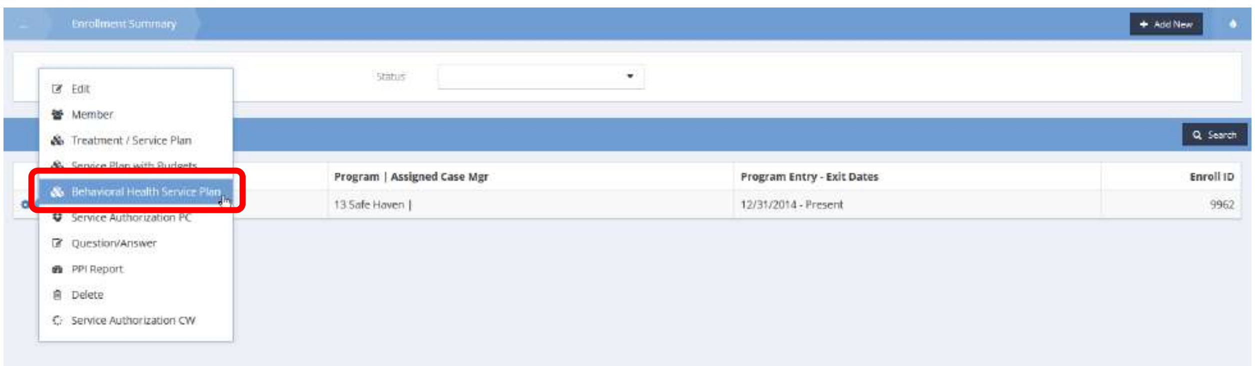


Goal Plan Summary – Workflow

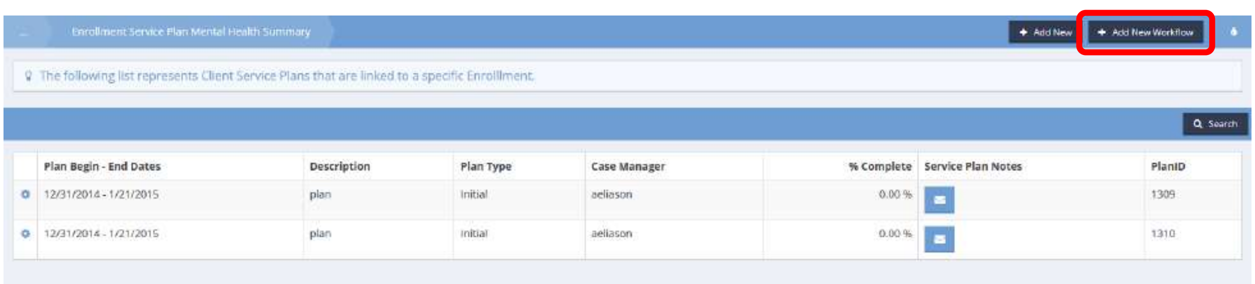
Objective: Add a service plan goal to a program a client is enrolled in using a workflow.



On the Enrollment Summary form, click the action gear associated with the desired program and select either Treatment / Service Plan or Behavioral Health Service Plan from the pop up menu that appears depending which is needed. This example uses Behavioral Health Service Plan.

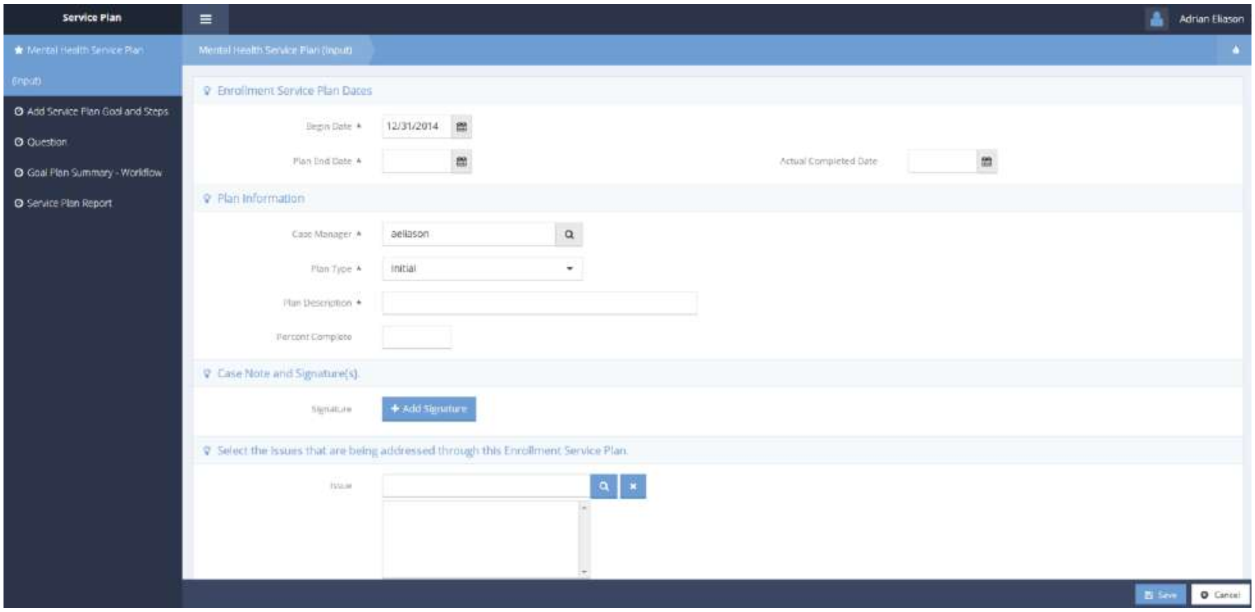


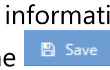
The Enrollment Service Plan Mental Health Summary displays.

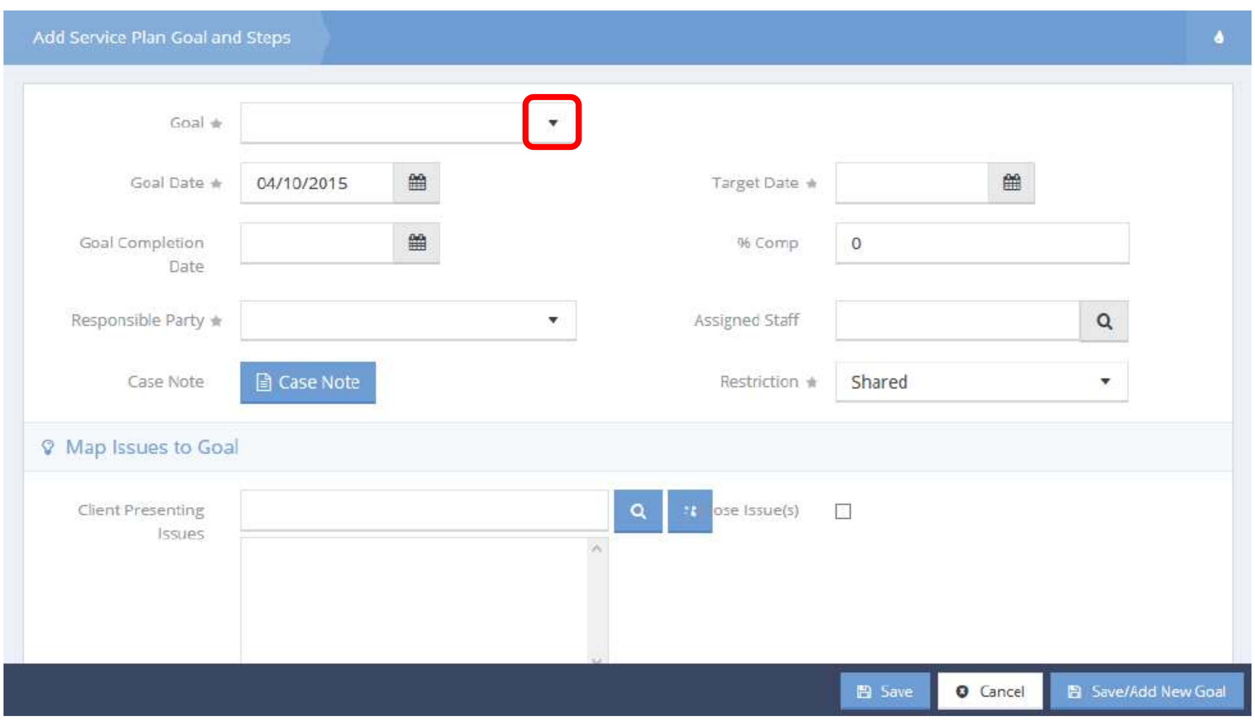


Click the **+ Add New Workflow** button.

The Mental Health Service Plan workflow opens in a new window.



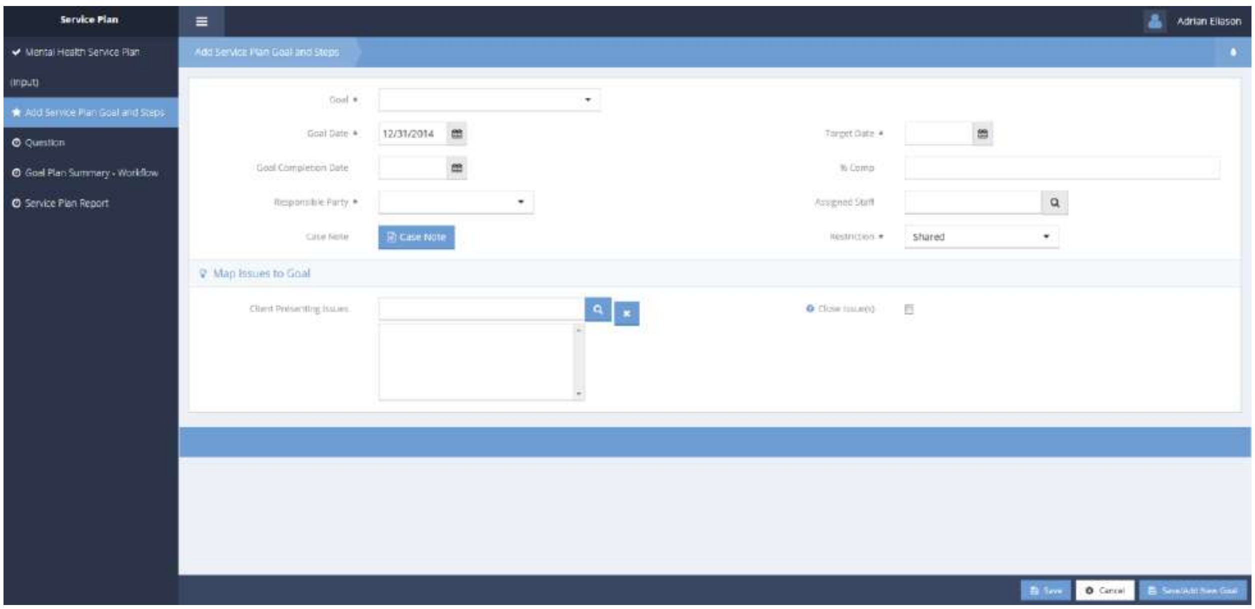
Enter the plan end date and description. Verify the other information and make any desired changes. Add a signature and select issues to be addressed. Click on the  button. Add Service Plan Goal and Steps, the next step in the workflow, displays.



Click on the drop-down arrow  icon for Goal. Select a goal from the drop-down list that appears.

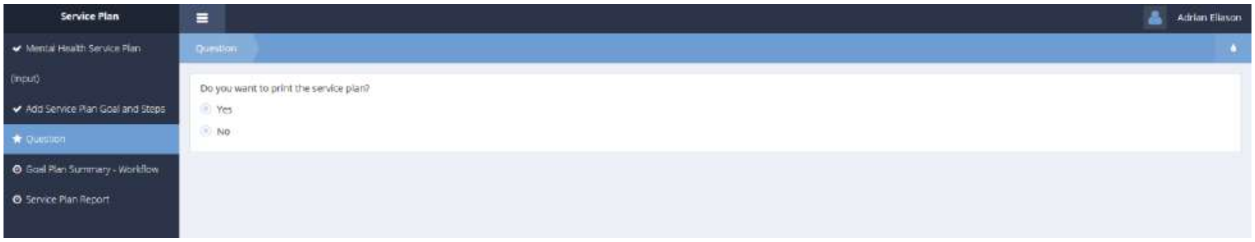
Goal steps associated with the goal appear in the lower portion of the form.

Enter goal, goal completion and target dates, assign a responsible party and staff member, ensure the restriction selected is correct, add a case note if desired and add any presenting issues.

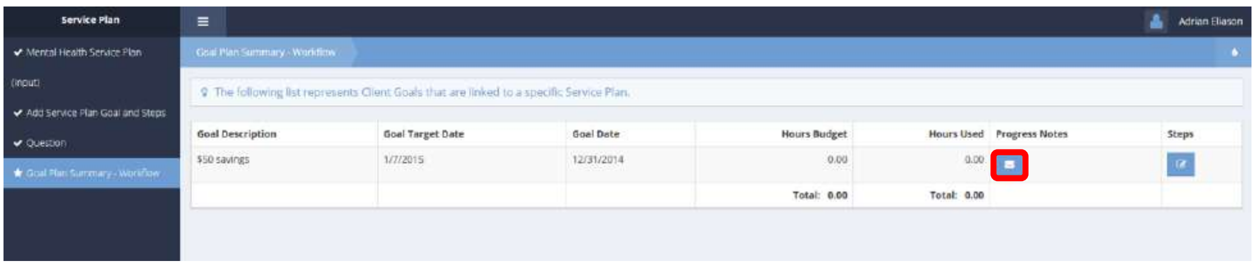


Chose the desired goal steps by clicking the clear checkbox associated with them. The row expands. Enter relevant information especially indicating if the step is required. Either click Save to finish or click Save/Add New Goal to add another goal.

The next form in the workflow, Question, appears.



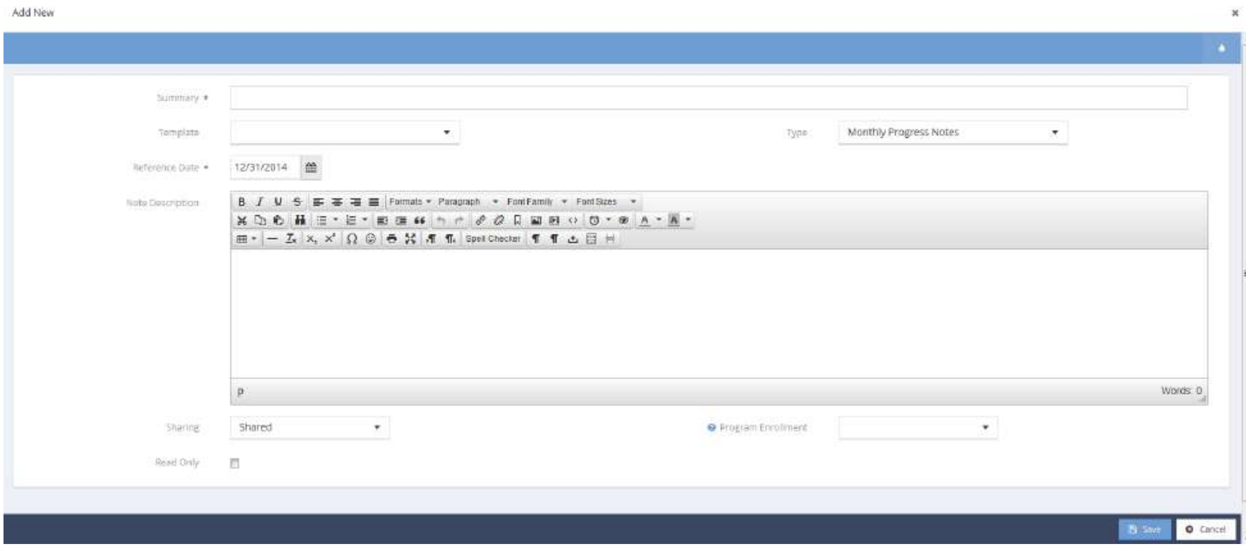
Click the radio button for "Yes" or "No" depending whether the service plan needs to be printed and click Save to proceed to the next form in the workflow. The Goal Plan Summary – Workflow form displays.

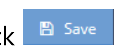


To view or edit notes, click the icon. The Progress Notes form displays.

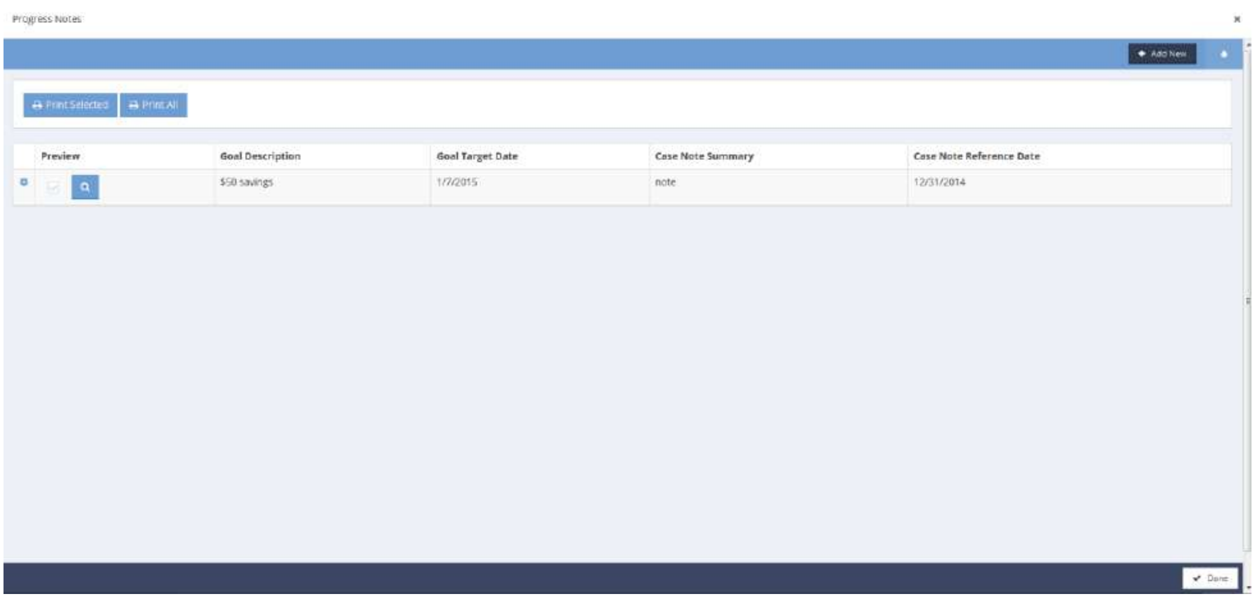
Click the Add New button to add a new note.

An Add New form displays.



Enter summary and reference dates (required) select a template and enter case notes. Click 

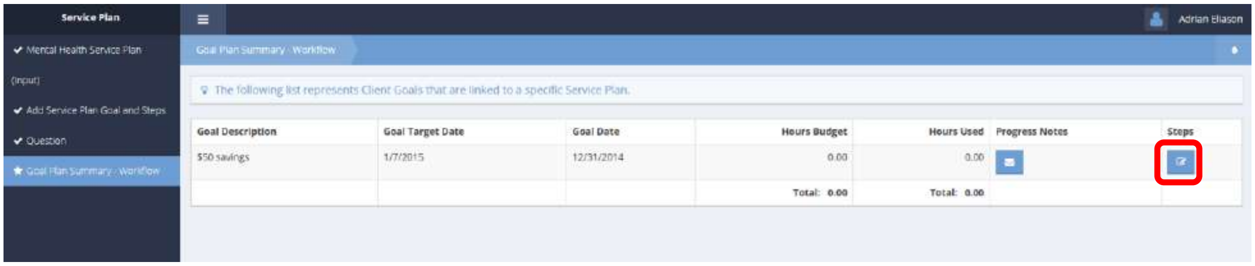
when finished. The Progress Notes form displays again.



Click

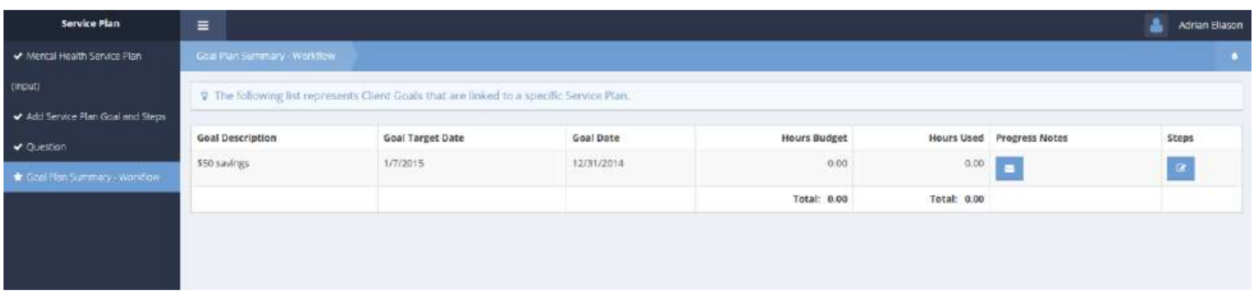
when finished viewing.

The Goal Plan Summary – Workflow form displays again.

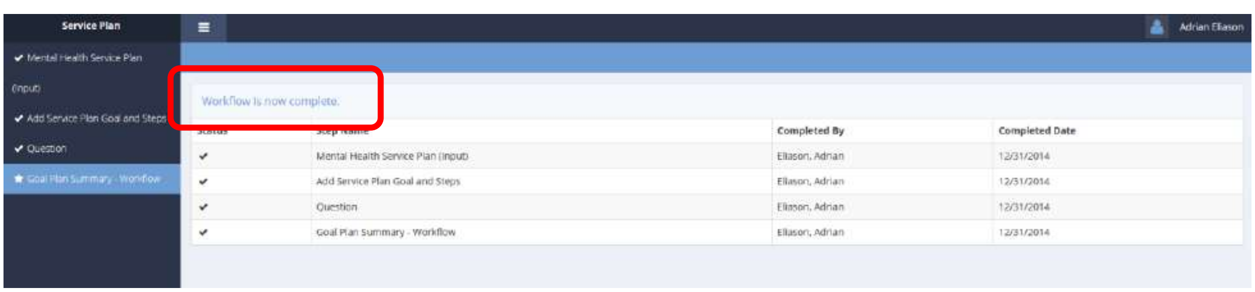


To view or edit steps, click the icon. The Steps form opens in a new window.

To add a step, click the clear checkbox next to the step. The steps change depending on the goal. Click Save when finished.

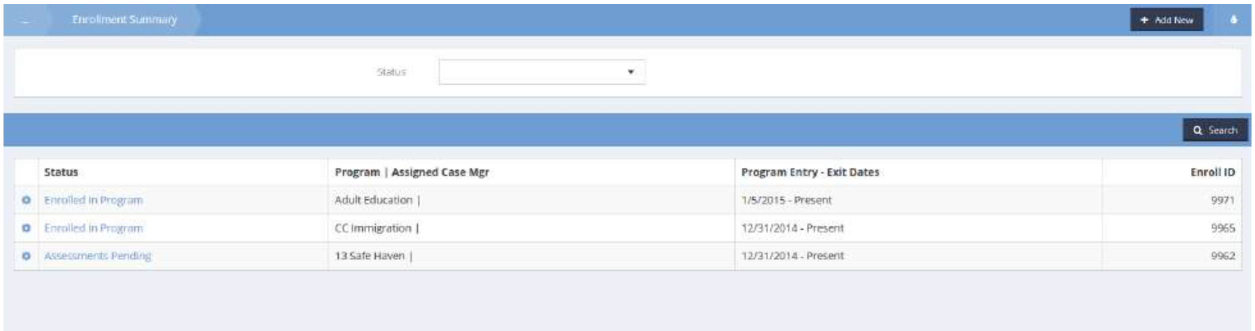


The workflow indicates it is complete. Click Done when finished viewing.

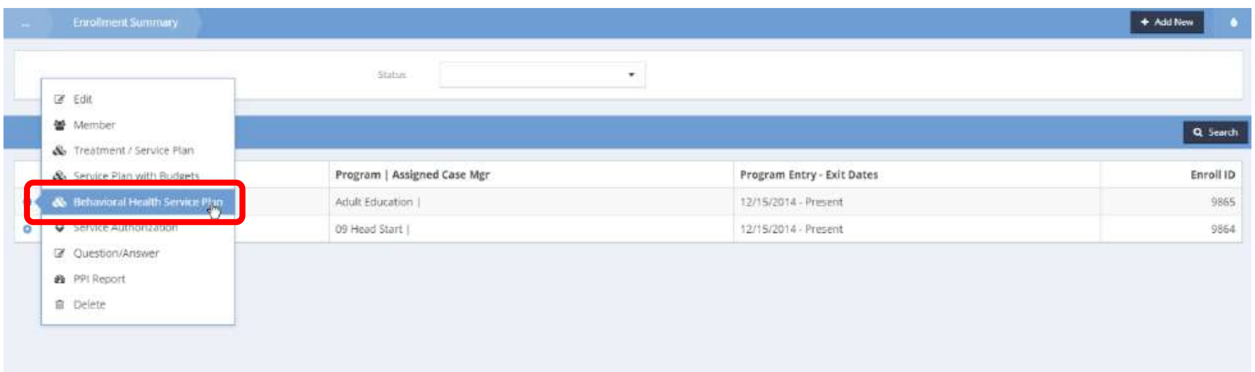


Add Service Plan Goal and Steps

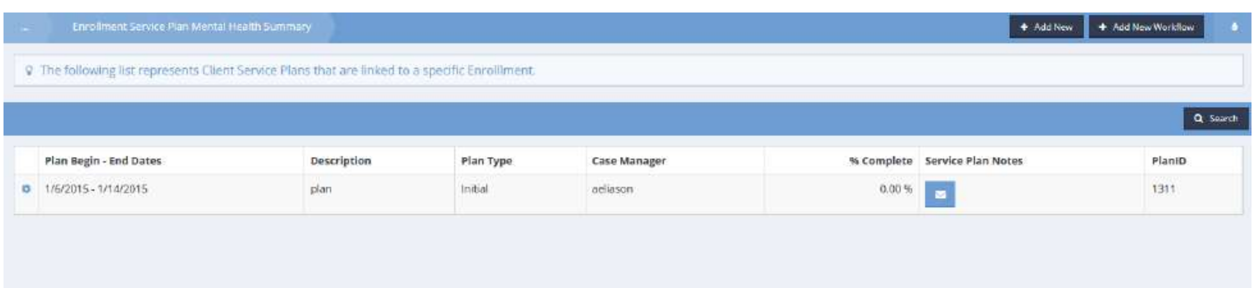
Objective: Add a service plan goal to a program a client is enrolled in.



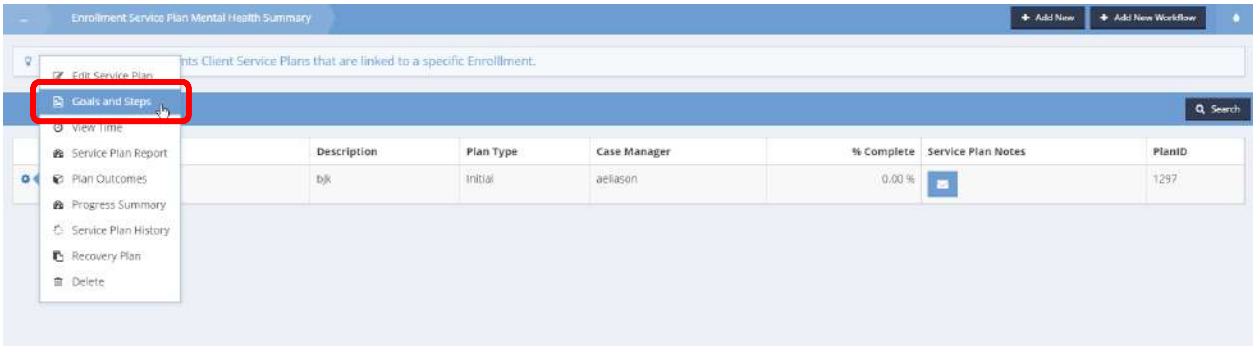
On the Enrollment Summary form, click on the action gear icon associated with the desired program and select a service plan from the pop up menu that appears. This example uses the Behavioral Health Service Plan.



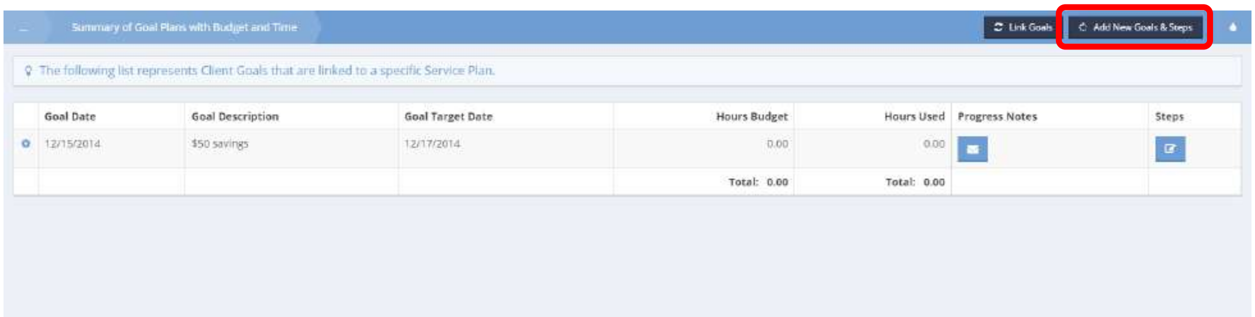
The Enrollment Service Plan Mental Health Summary form displays.



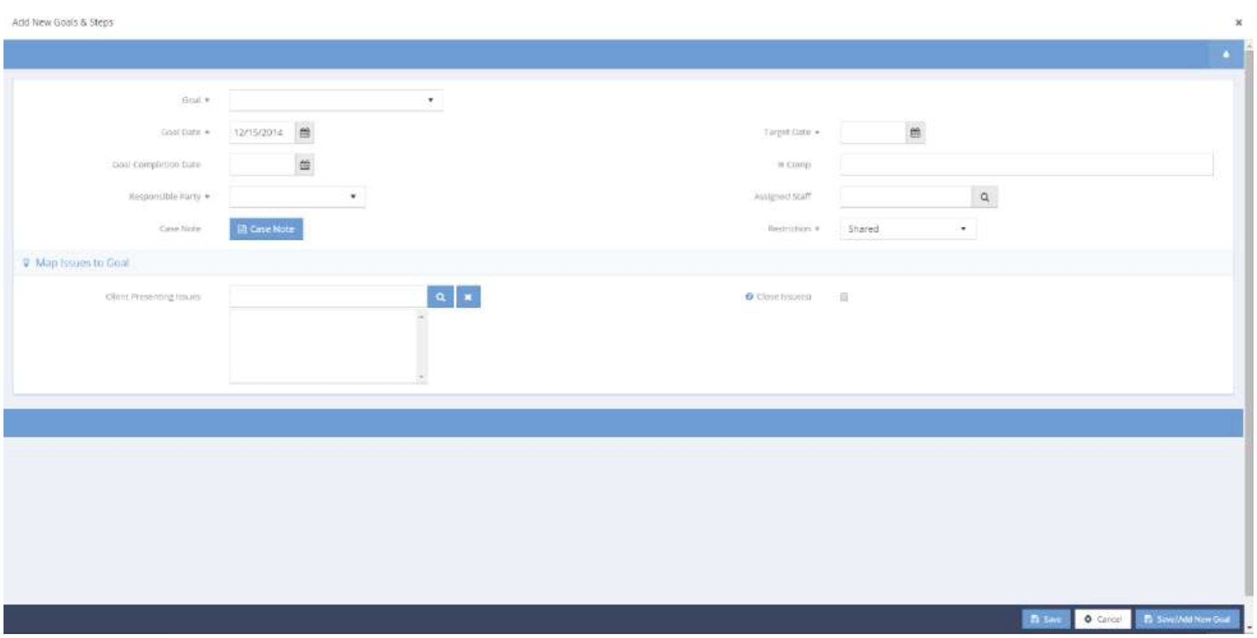
Click the action gear associated with the desired service plan and select Goals and Steps from the pop up menu that appears.



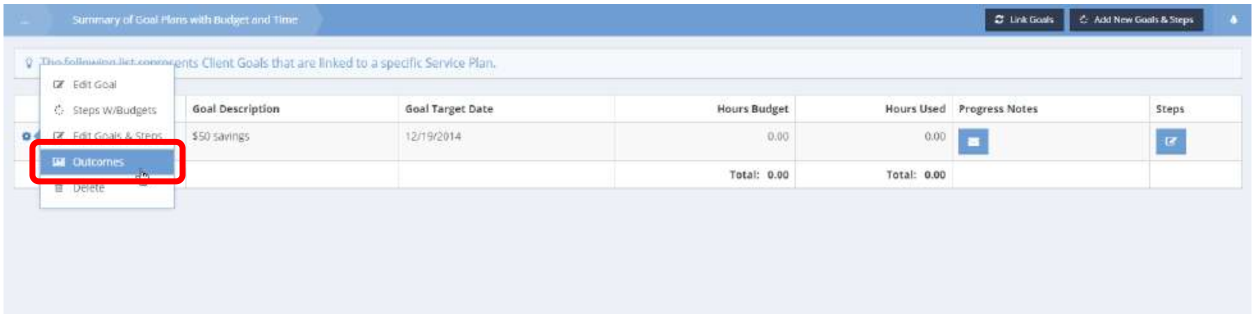
The Goal Plan with Budget & Time Summary displays.



Click the Add New Goals & Steps button. The Add Service Plan Goal and Steps form displays.



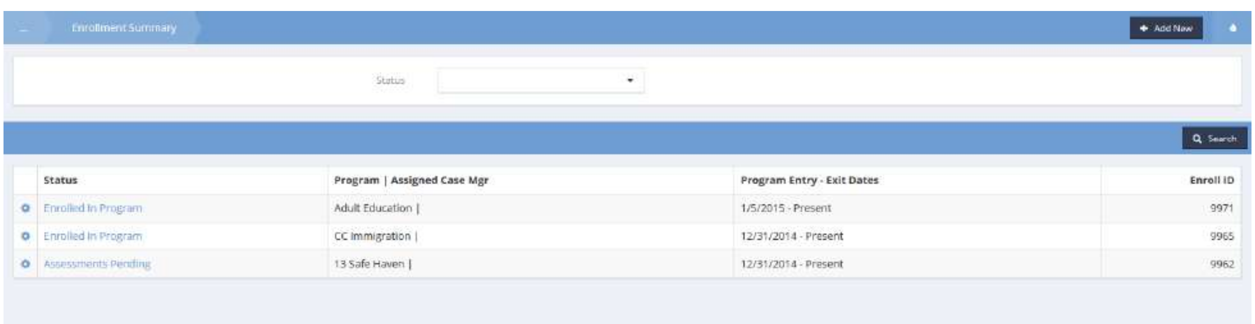
Click Save when finished. The Goal Plan with Budget & Time Summary displays.



Click the action gear and click Outcomes. The Client Goal Outcomes Summary form displays.

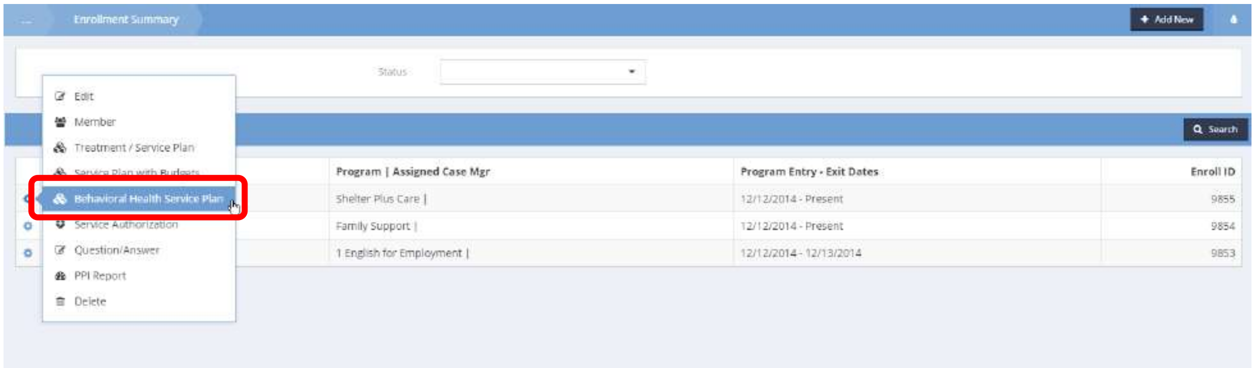
Edit Case Note with Reference Date

Objective: View and edit case notes relating to program enrollment.



On the Enrollment Summary form, click on the action gear icon associated with the desired program and select a service plan from the pop up menu that appears.

This example uses the Behavioral Health Service Plan.



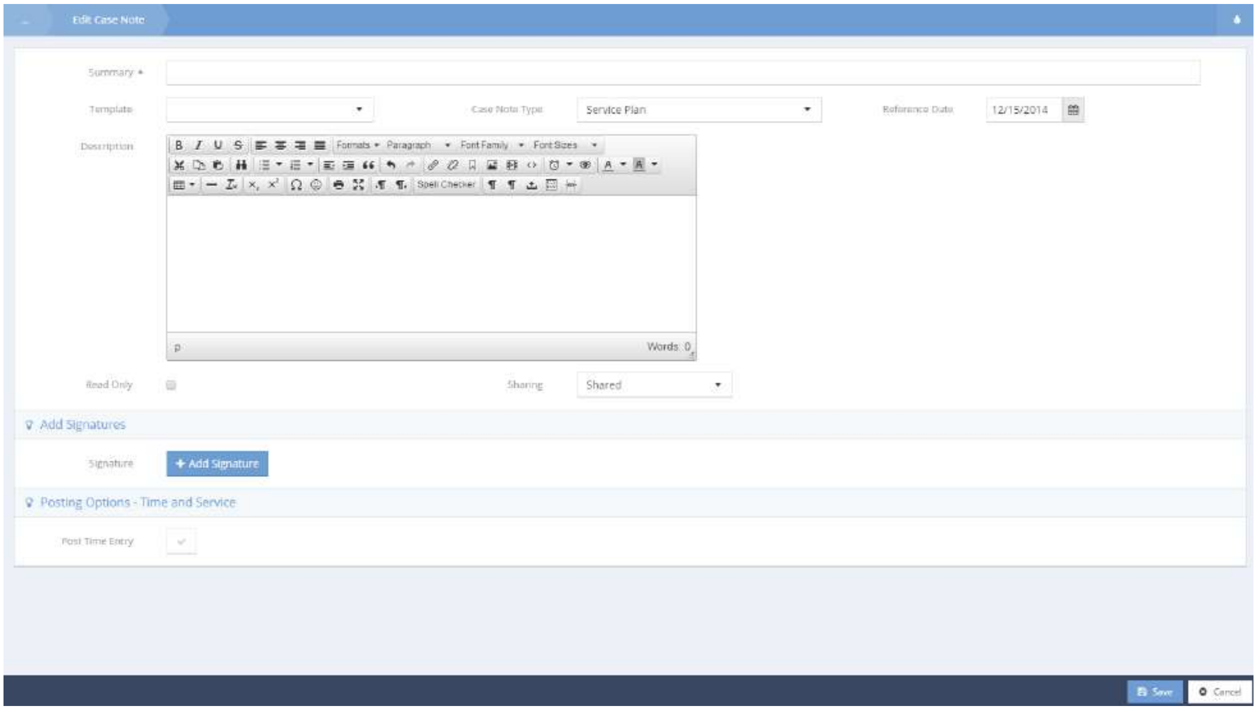
The Enrollment Service Plan Mental Health Summary form displays. Click the notes icon on a plan.

The Service Plan Case Notes Summary form displays.

Click the action gear icon associated with the desired service plan and select Edit from the pop up menu that appears.

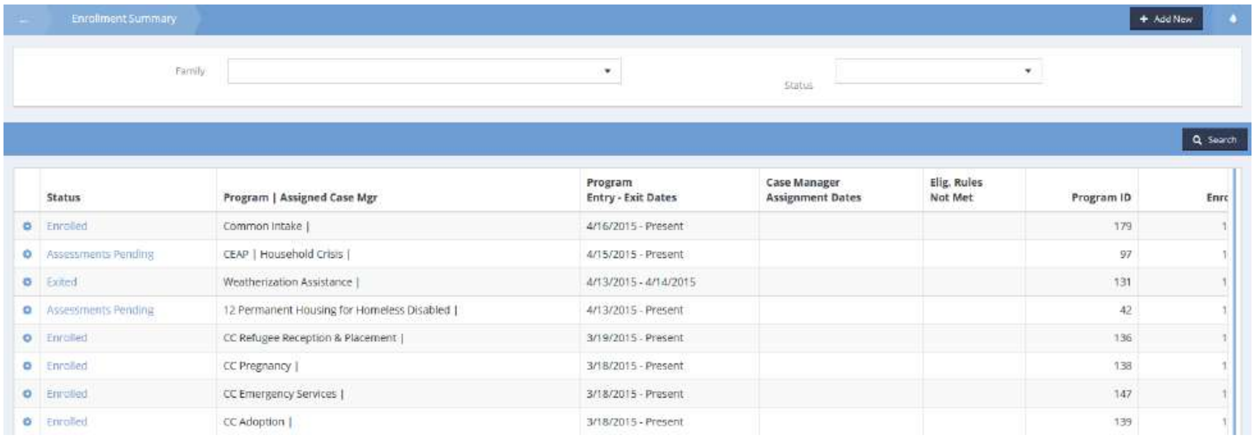
The Edit Case Note form displays. Make any changes and click on the 

button.

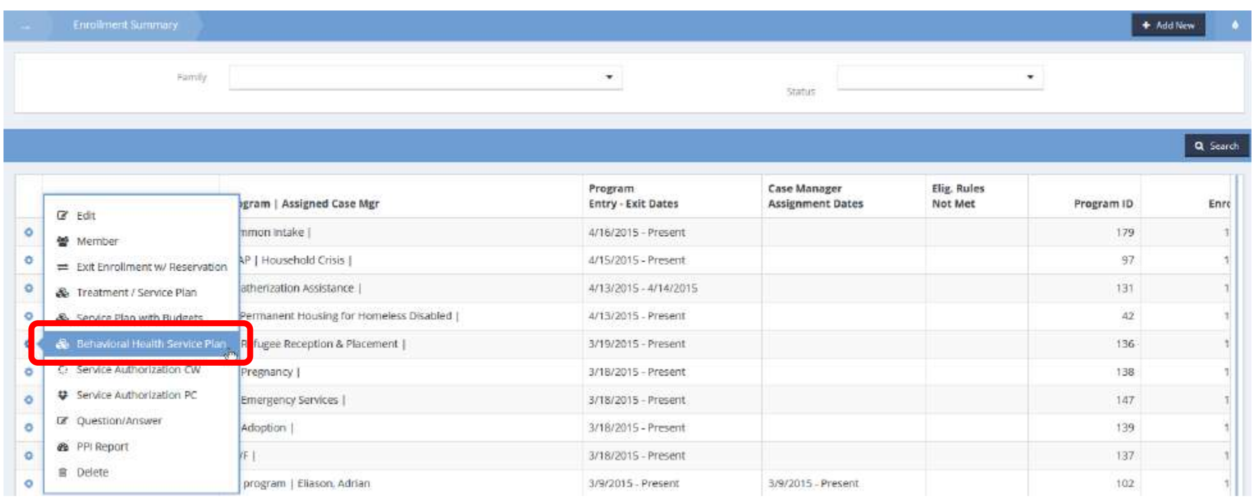


Service Plan Progress Reporting

Objective: Produce a custom-tailored service plan report for viewing or export.



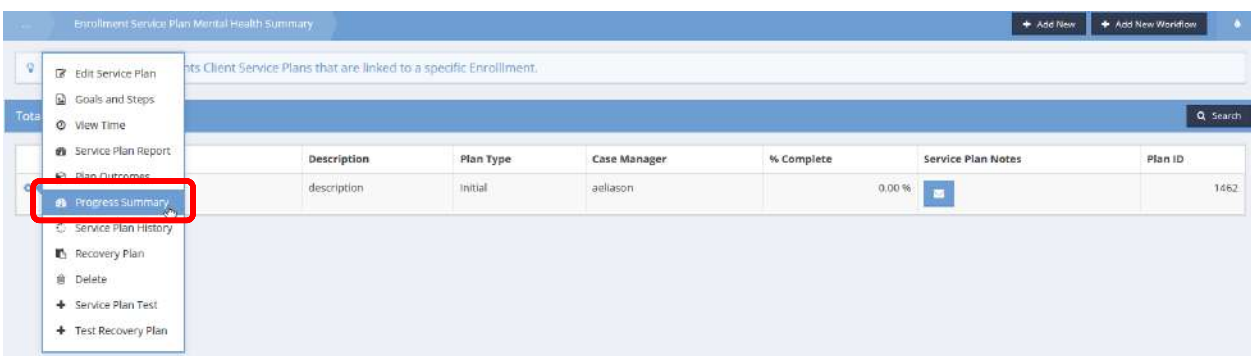
Click on the action gear icon associated with the desired program. Select Behavioral Health Service Plan from the pop up menu that appears.



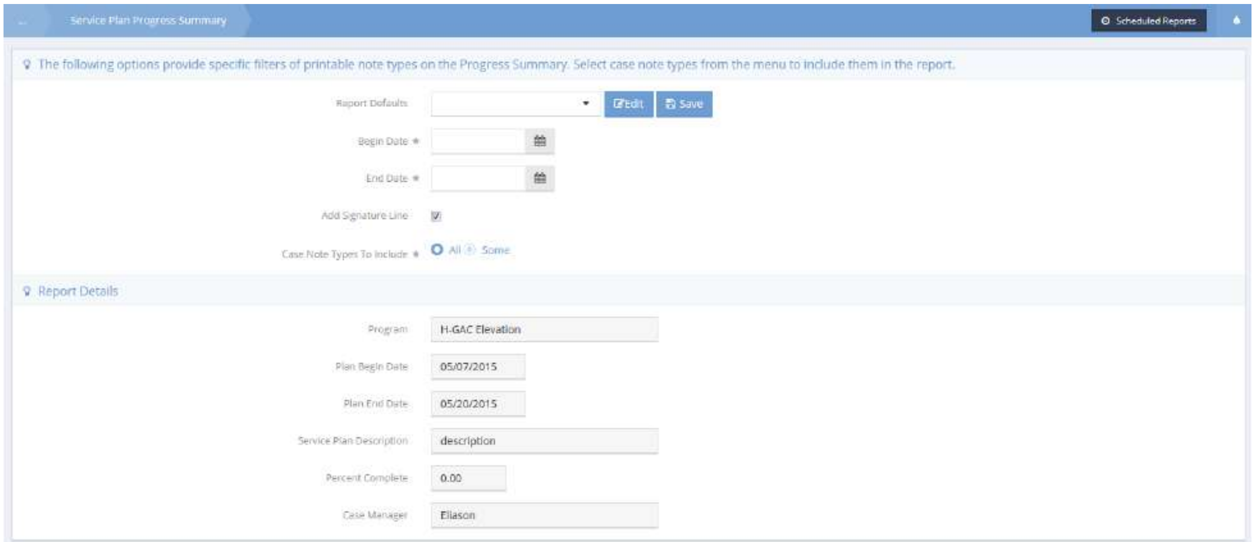
The Enrollment Service Plan Mental Health Summary form displays.

Click on the icon associated with the desired service plan. The Service Plan Case Notes Summary form displays.

Click on the action gear icon associated with the desired service plan. Select Progress Summary from the pop up menu that appears.



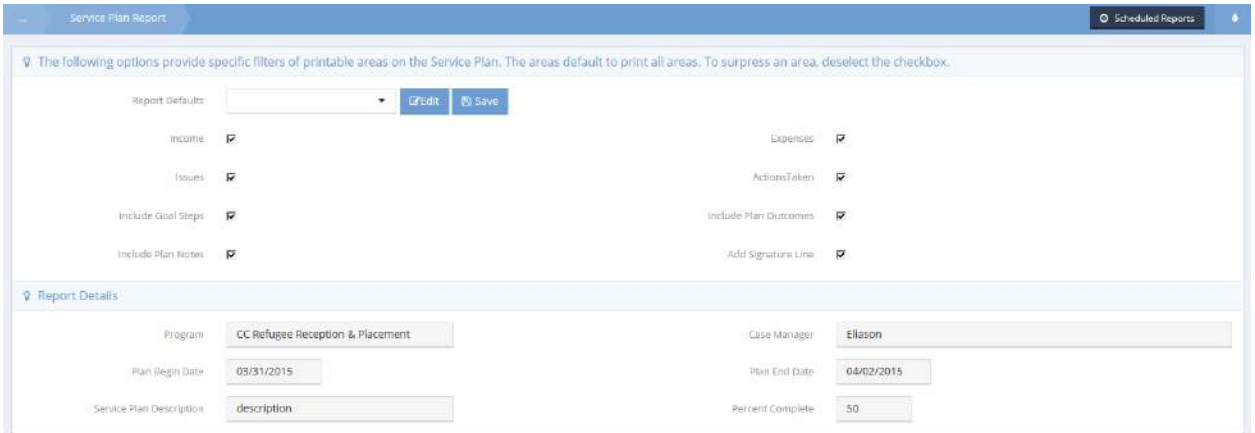
The Service Plan Progress Summary form displays.



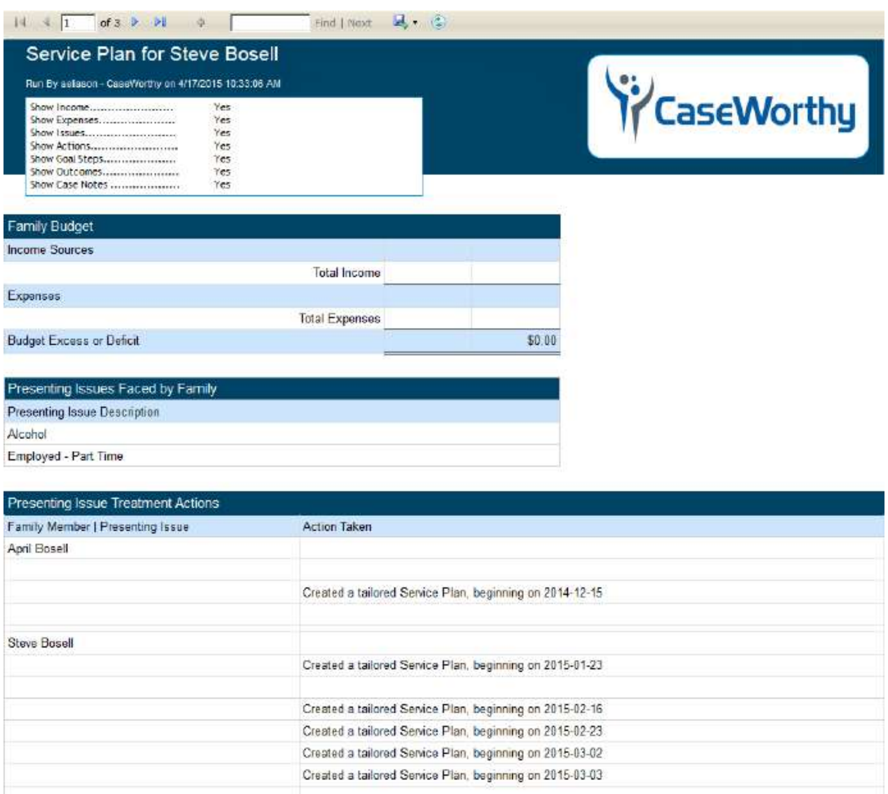
If this is the user's first Service Plan report request, the Report Defaults field drop-down list displays nothing. If there are reports listed in the drop-down list and the desired report is in that list, select it and click on the Report button. If a new report is desired, enter the dates and case note types to be included and click the Save button near the top of the form. Click the Report button to produce the report.

To create a Service Plan Report, from the Mental Health Service Plan form, click on the action gear icon associated with the desired service plan. Select Service Plan Report from the pop up menu that appears.

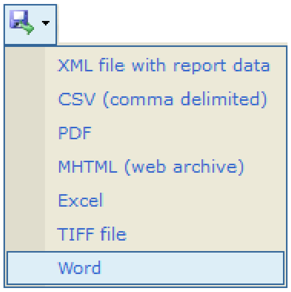
The Service Plan Report form displays.



The report form sets all areas of the report to print. To prevent any area from printing, uncheck the checkbox for that area. To save the report configuration for future use, click on the Save button near the top of the form and enter a name for the report. To run the report, click on the Report button. The report opens in a new window.

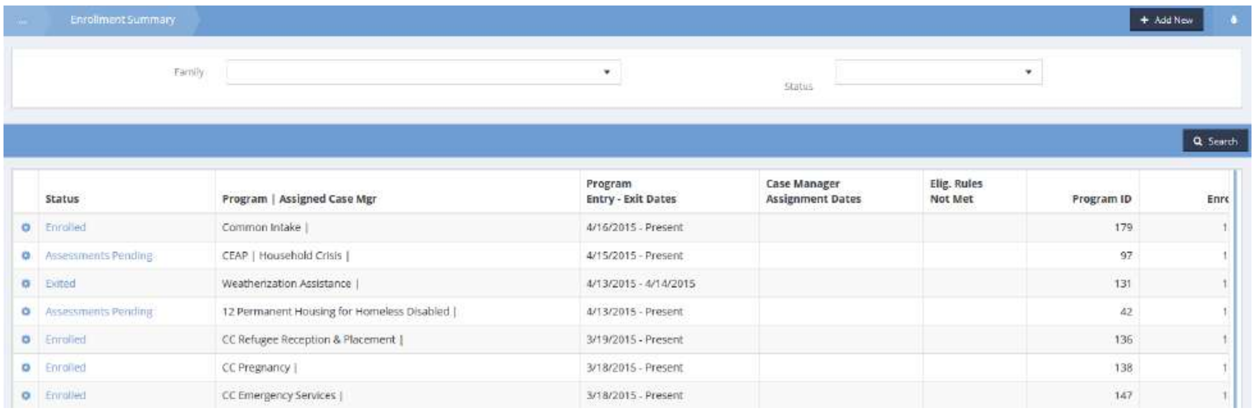


Export the report in one of several available formats by clicking on the appropriate button at the top of the report and selecting the desired format.

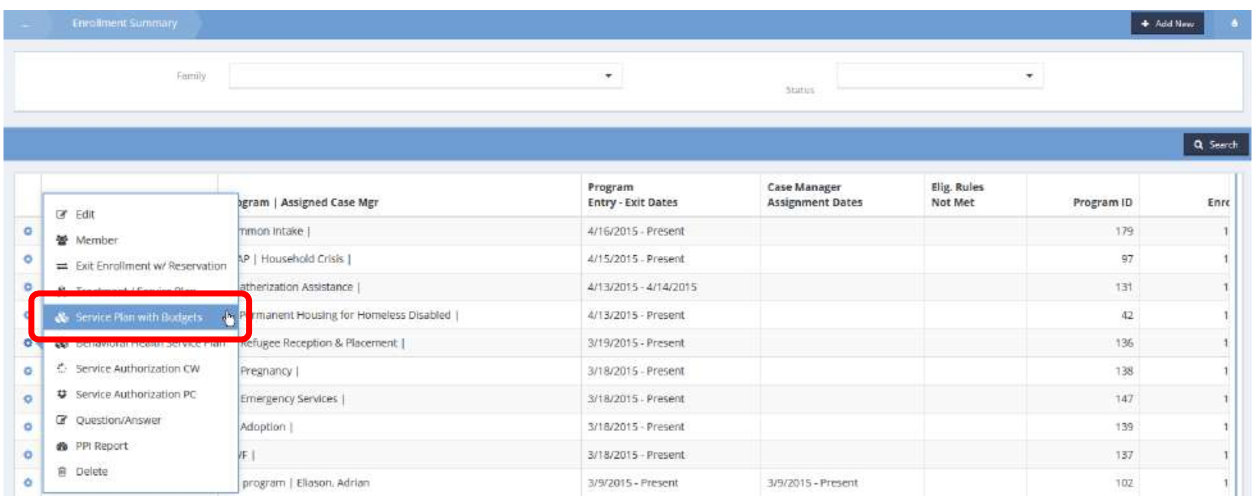


Intervention Notes

Objective: Add, edit or delete step intervention notes.



Click on the action gear icon associated with the desired program. Select Service Plan with Budgets from the pop up menu that appears.



The Summary of Enrollment Service Plans with Budgets form displays.

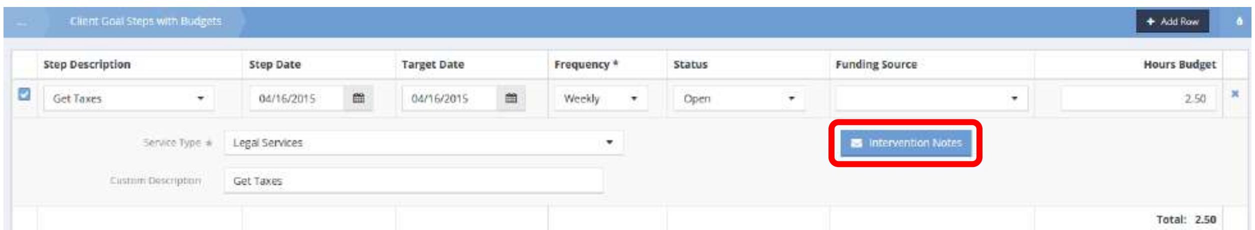
Click on the action gear icon associated with the desired service plan and select Service Plan Goals (Budgets) from the pop up menu that appears.

The Summary of Goal Plans with Budgets form displays.

Click on the action gear icon associated with the desired goal plan and select Steps W/Budgets from the pop up menu that appears.

The Client Goal Steps with Budgets form displays. Click on the blue checkbox associated with the desired goal step.

The row expands. Click on the Intervention Notes button.

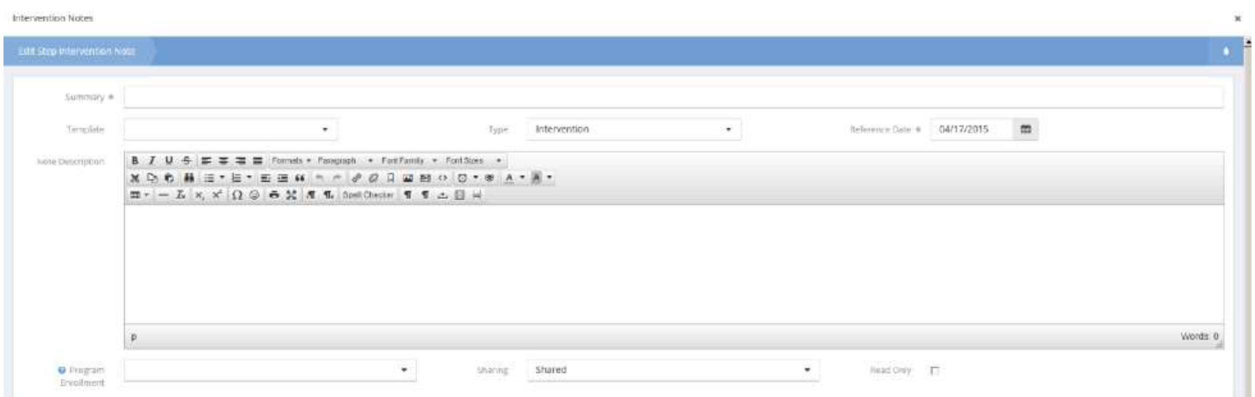


The Intervention Notes form displays.

Edit an existing entry or add a new intervention note.

To edit, click on the action gear icon associated with the desired note. Select Edit form the pop up menu that appears.

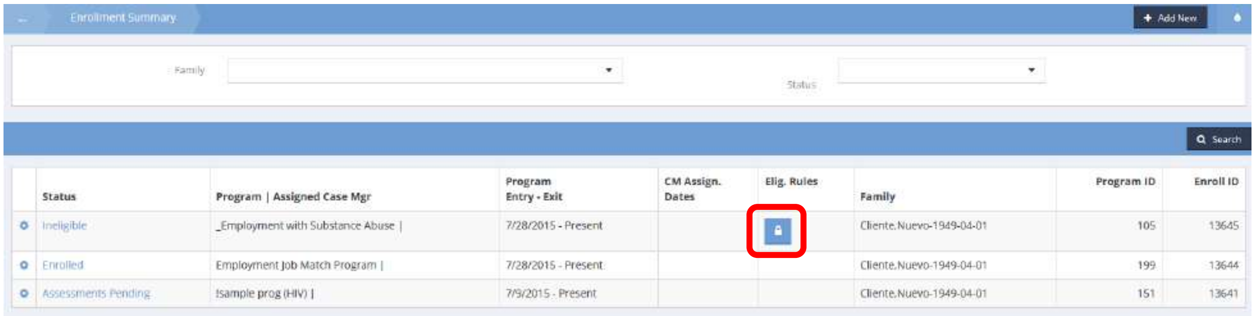
To add a new note, click on the Add New button. For adding and editing, the Intervention Notes form displays. Enter or alter the note as desired.



When finished, click on the Save button.

Enrollment Denied Reason

Objective: View the reason a client is ineligible for program enrollment.

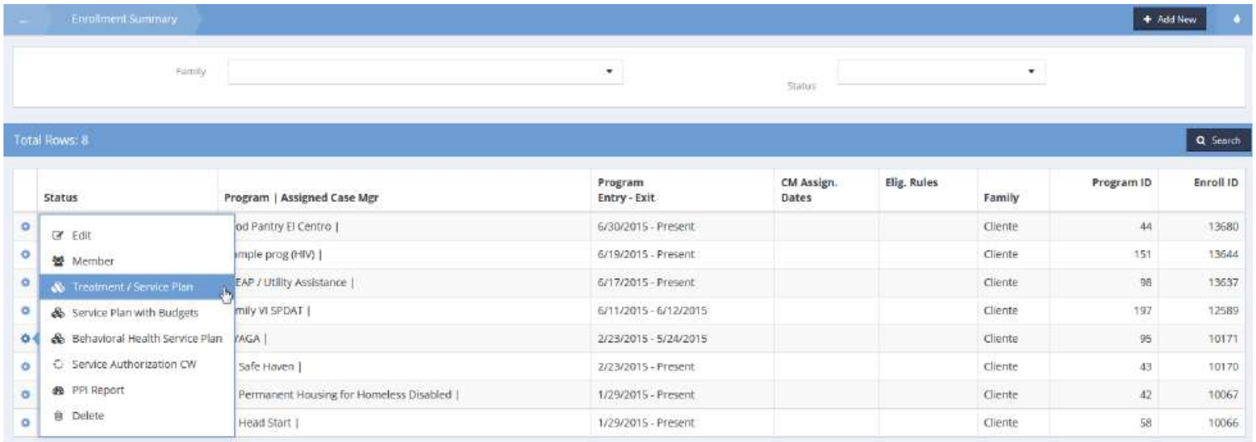


If a client is ineligible for a program, the lock icon appears in the Eligibility Rules column. To view why the client was denied enrollment, click the lock icon. The Enrollment Denied Reason form displays.

The program name, status and rules not met display in their respective fields. Click Done when finished viewing.

Edit Enrollment Service Plan

Objective: Edit an existing enrollment service plan.



Click the action gear icon for the program with the desired service plans and click a service plan type. In this example, Treatment / Service Plan is used. The Enrollment Service Plan Summary form displays.

Click the action gear icon for the desired program and click Edit. The Enter Enrollment Service Plan form displays.

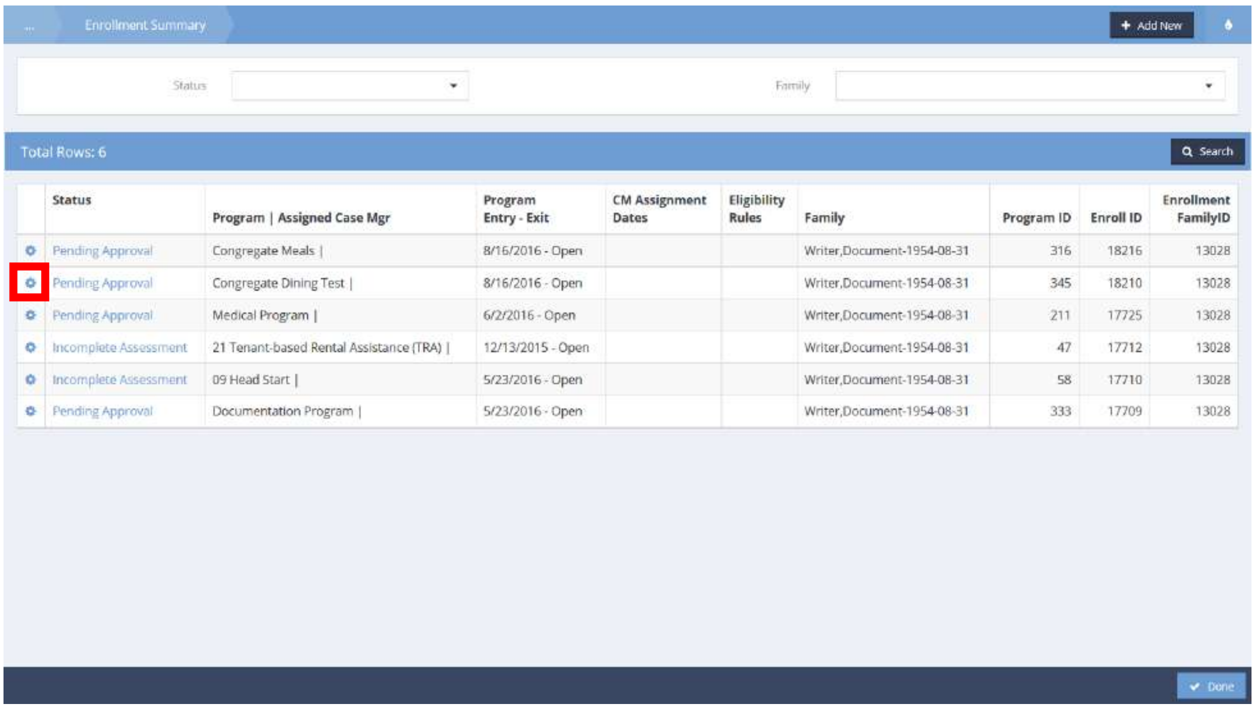
Make any necessary changes and click Save when finished.

IEP/IFSP

Objective: View Individualized Educational Plan and Individual Family Service Plan histories.

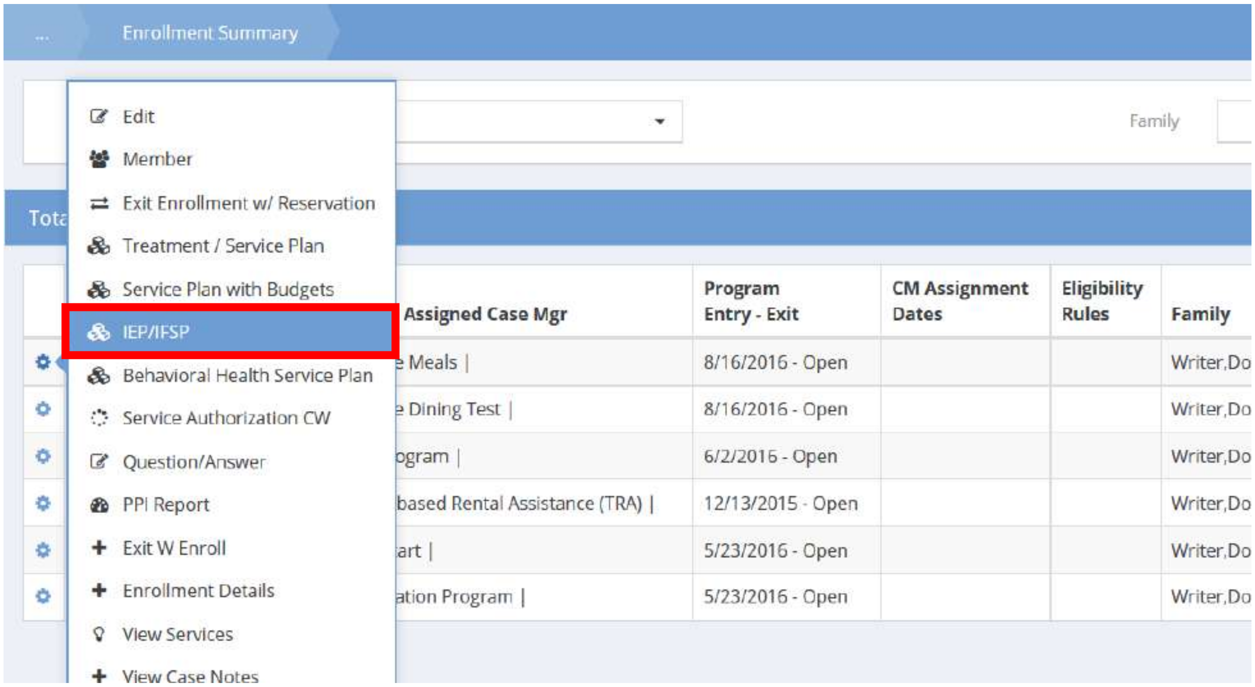
Navigation: Case Management>Case Management>Program Enrollment

The Enrollment Summary form displays.

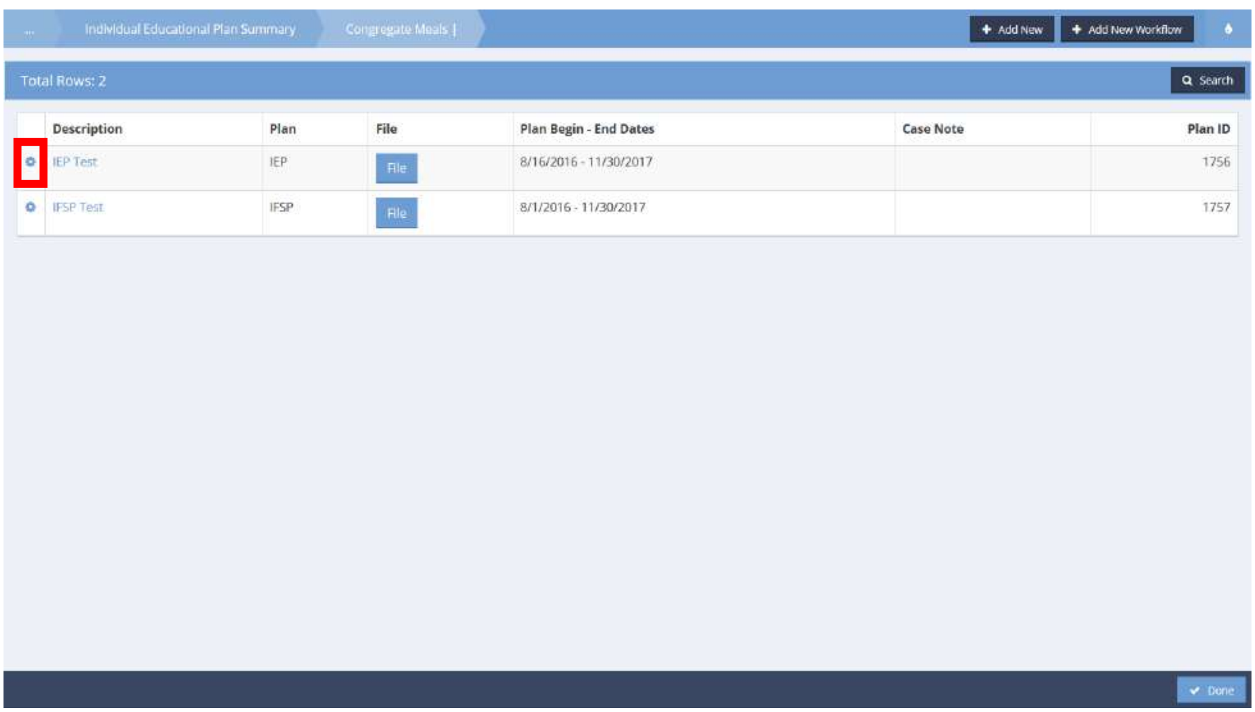


	Status	Program | Assigned Case Mgr	Program Entry - Exit	CM Assignment Dates	Eligibility Rules	Family	Program ID	Enroll ID	Enrollment FamilyID
	Pending Approval	Congregate Meals |	8/16/2016 - Open			Writer,Document-1954-08-31	316	18216	13028
	Pending Approval	Congregate Dining Test |	8/16/2016 - Open			Writer,Document-1954-08-31	345	18210	13028
	Pending Approval	Medical Program |	6/2/2016 - Open			Writer,Document-1954-08-31	211	17725	13028
	Incomplete Assessment	21 Tenant-based Rental Assistance (TRA) |	12/13/2015 - Open			Writer,Document-1954-08-31	47	17712	13028
	Incomplete Assessment	09 Head Start |	5/23/2016 - Open			Writer,Document-1954-08-31	58	17710	13028
	Pending Approval	Documentation Program |	5/23/2016 - Open			Writer,Document-1954-08-31	333	17709	13028

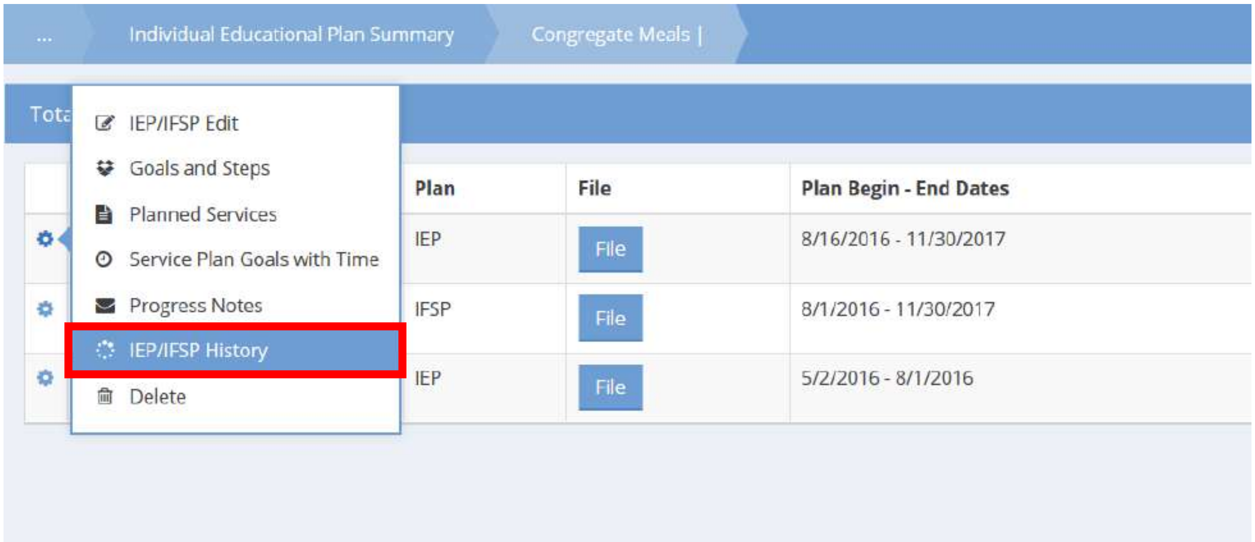
Click the action gear  icon associated with the desired enrollment and select IEP/IFSP from the menu options.



The Individualized Educational Plan Summary form displays.

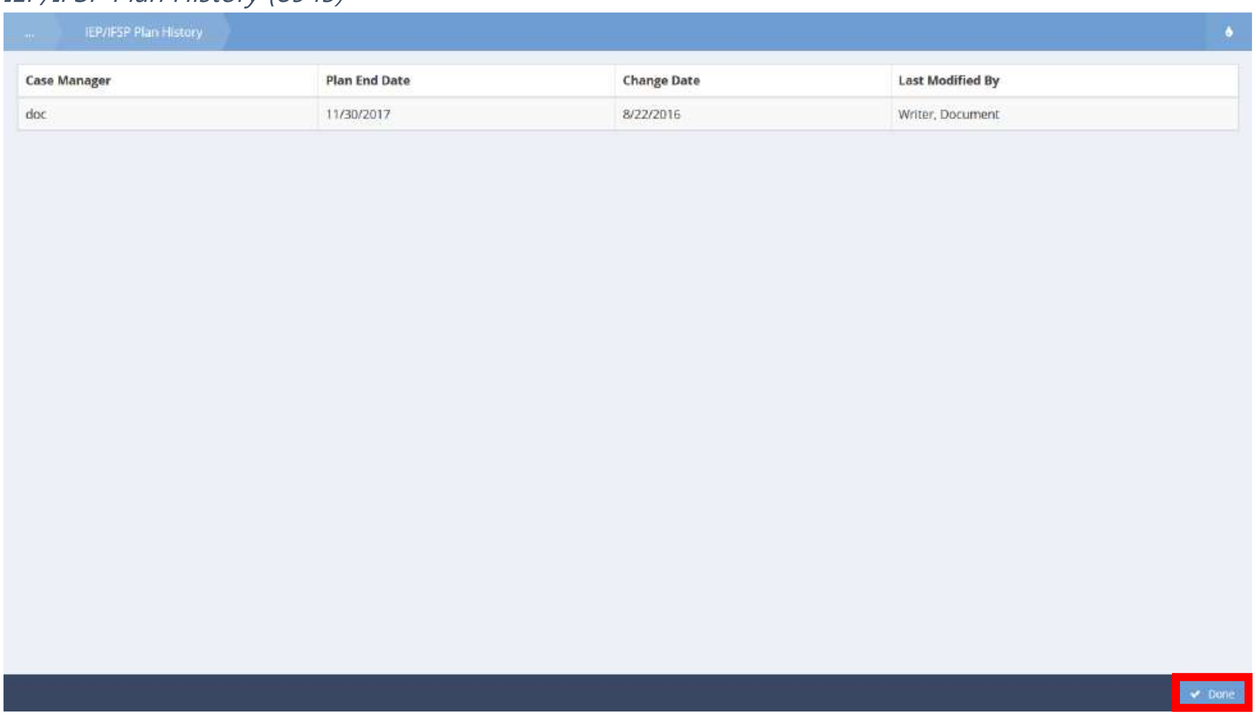


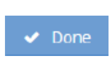
Existing IEPs and IFSPs display. Click the action gear icon associated with the desired plan and select IEP/IFSP History.



The IEP/IFSP Plan History form displays.

IEP/IFSP Plan History (8945)

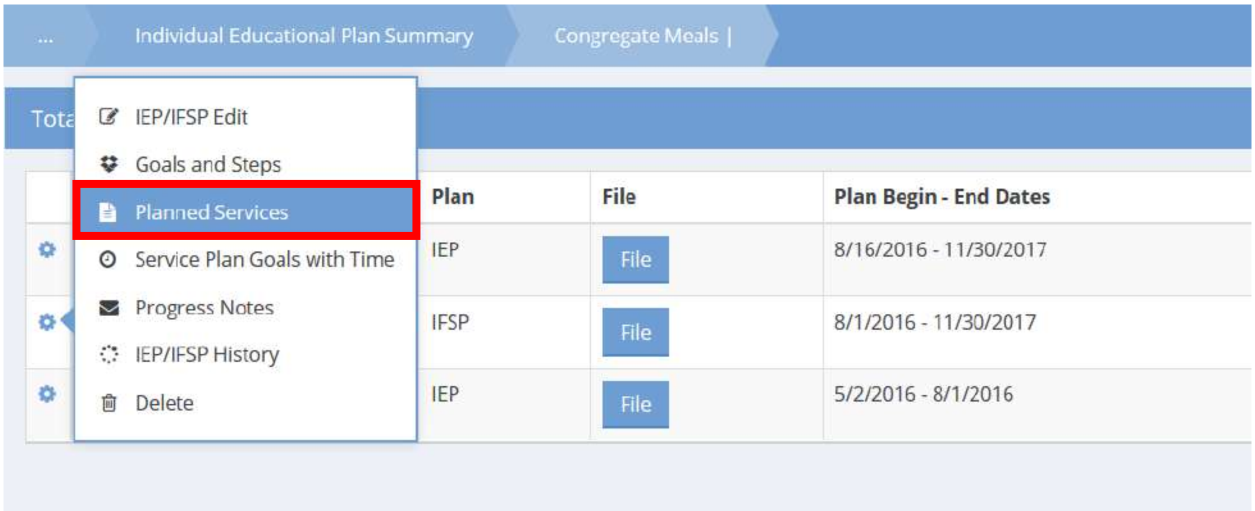


View the plan history. Click the  button when finished.

Objective: View and add IEP/IFSP planned services.

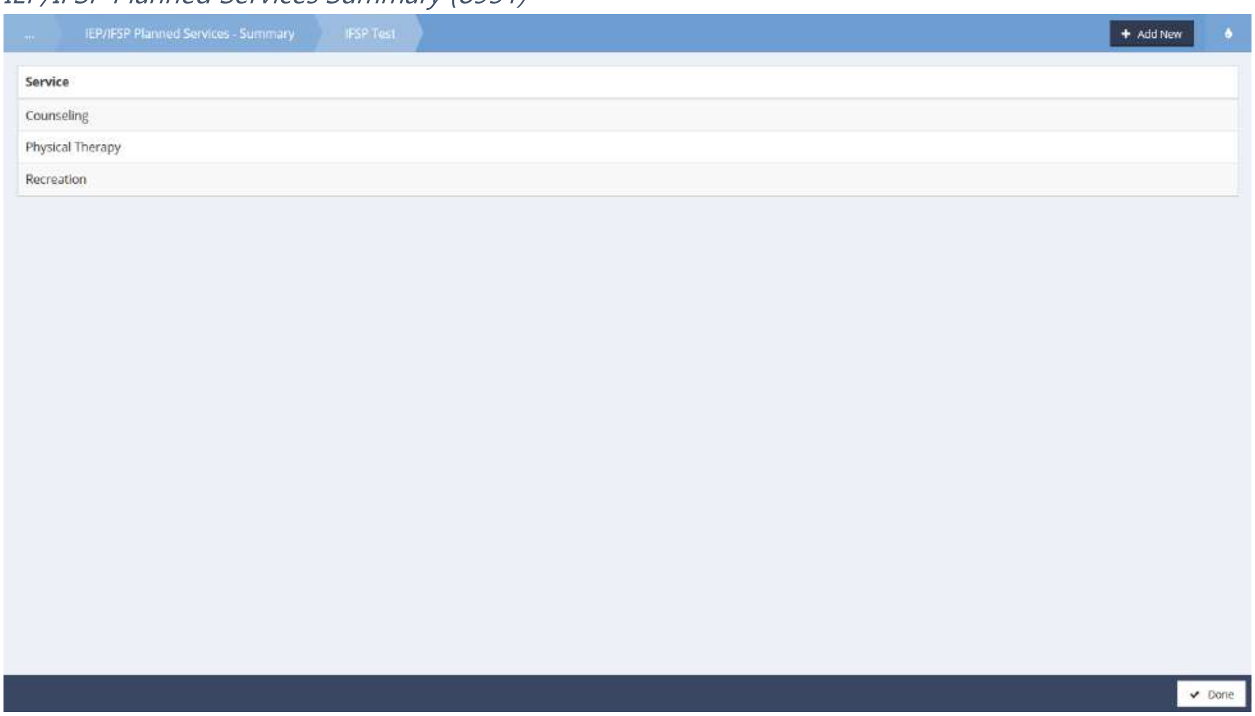
Navigation: Case Management>Case Management>Program Enrollment

Click the action gear icon associated with the desired plan and select Planned Services from the menu options.



The IEP/IFSP Planned Services – Summary form displays.

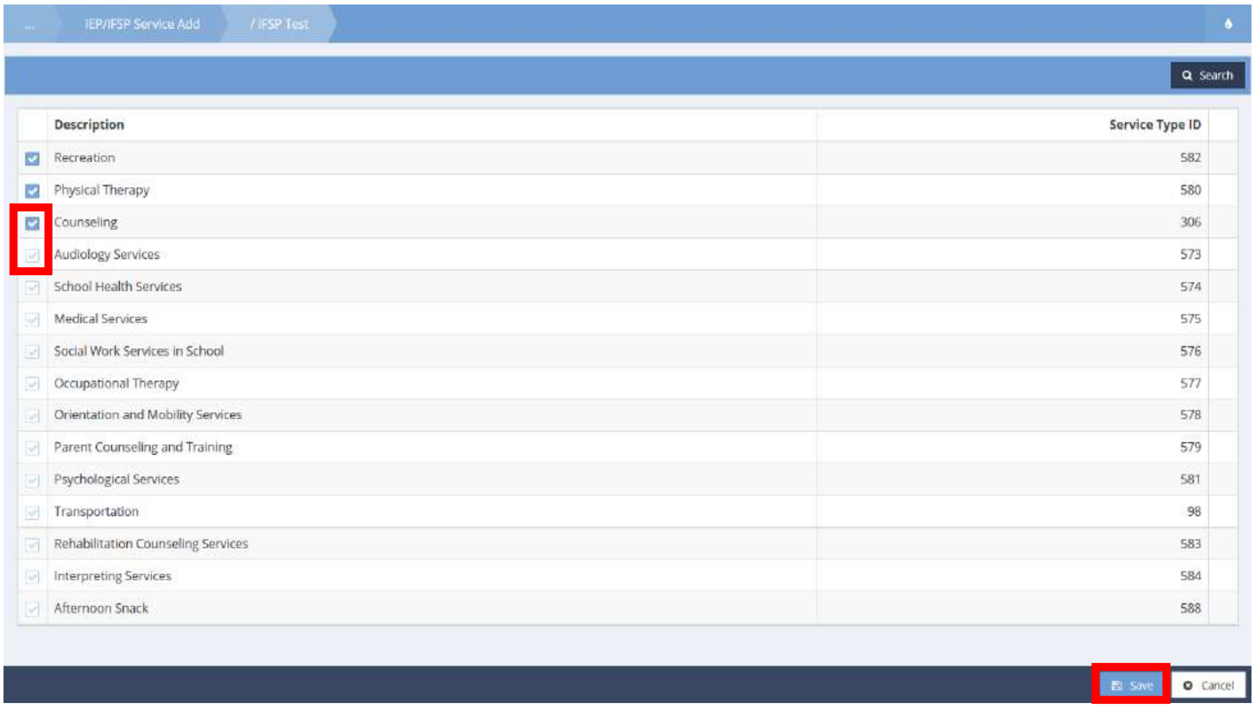
IEP/IFSP Planned Services Summary (8951)



A list of services displays. To add new services, click the Add New button.

The IEP/IFSP Service Add form displays.

IEP/IFSP Planned Services Add (8950)

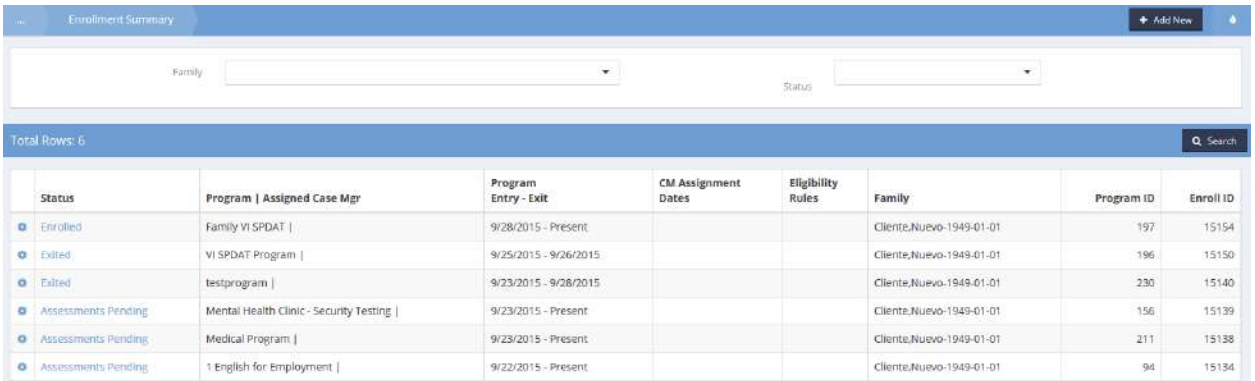


Existing services are indicated by a blue checkbox icon. To add additional services, click the clear checkbox icon associated with the desired service. The checkbox turns from clear to blue. Click the Save button to save and exit.

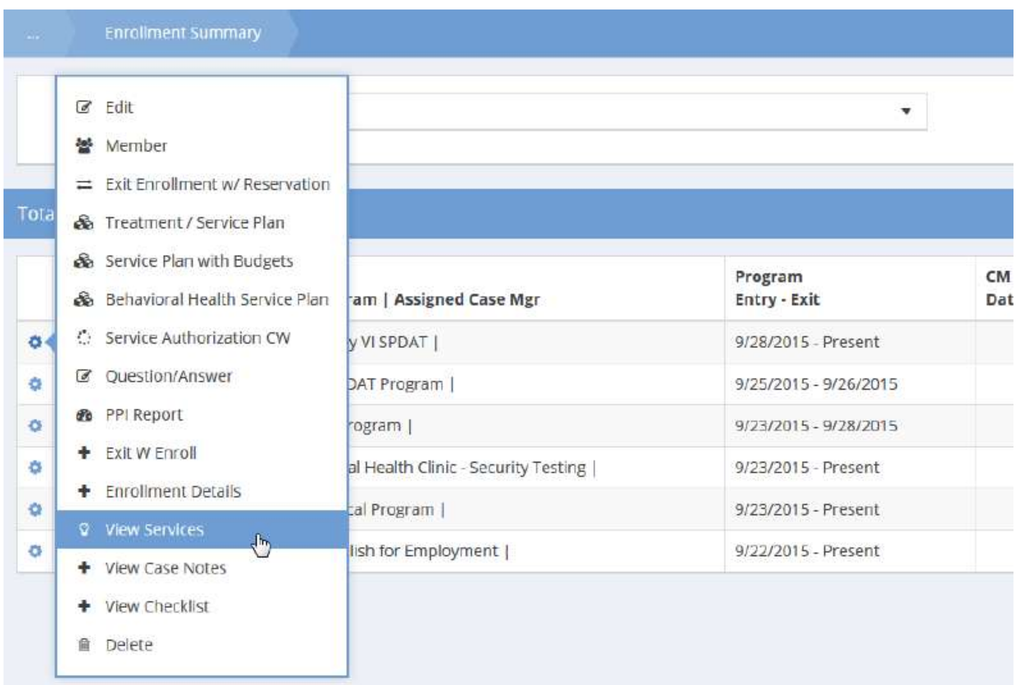
Program Individual Services Summary

Objective: View client services for an enrolled program.

Navigation: Case Management>Case Management>Program Enrollment

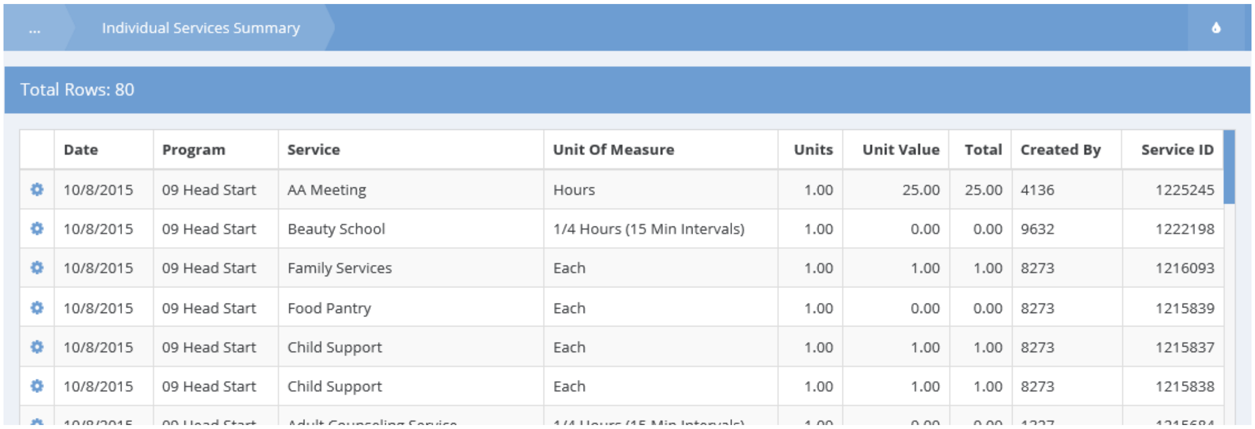


The Enrollment Summary form displays.



Click the action gear  icon associated with the desired enrollment and click View Services on the pop up menu that appears.

The Individual Services Summary form displays a list of services for the selected enrollment.



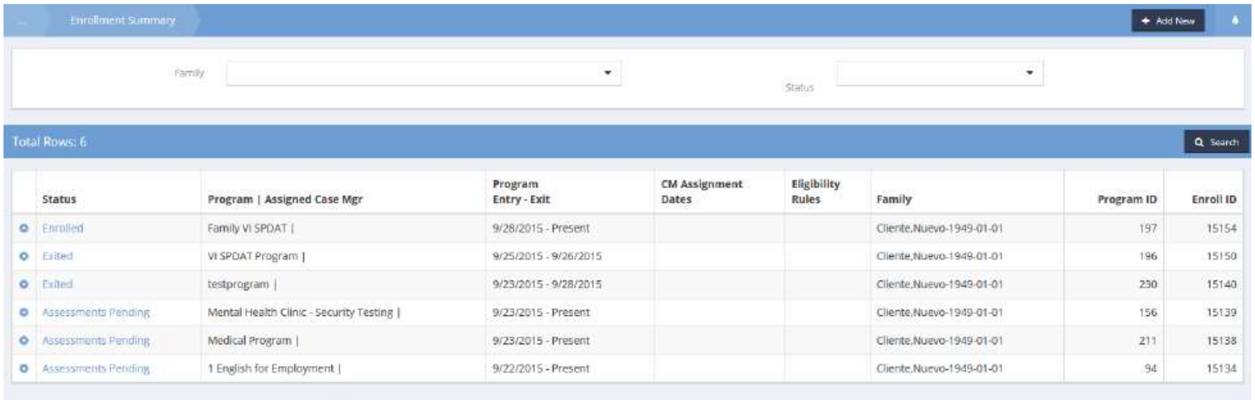
	Date	Program	Service	Unit Of Measure	Units	Unit Value	Total	Created By	Service ID
	10/8/2015	09 Head Start	AA Meeting	Hours	1.00	25.00	25.00	4136	1225245
	10/8/2015	09 Head Start	Beauty School	1/4 Hours (15 Min Intervals)	1.00	0.00	0.00	9632	1222198
	10/8/2015	09 Head Start	Family Services	Each	1.00	1.00	1.00	8273	1216093
	10/8/2015	09 Head Start	Food Pantry	Each	1.00	0.00	0.00	8273	1215839
	10/8/2015	09 Head Start	Child Support	Each	1.00	1.00	1.00	8273	1215837
	10/8/2015	09 Head Start	Child Support	Each	1.00	1.00	1.00	8273	1215838

Click on the action gear icon for the desired service to edit it, view the account transaction or delete the service.

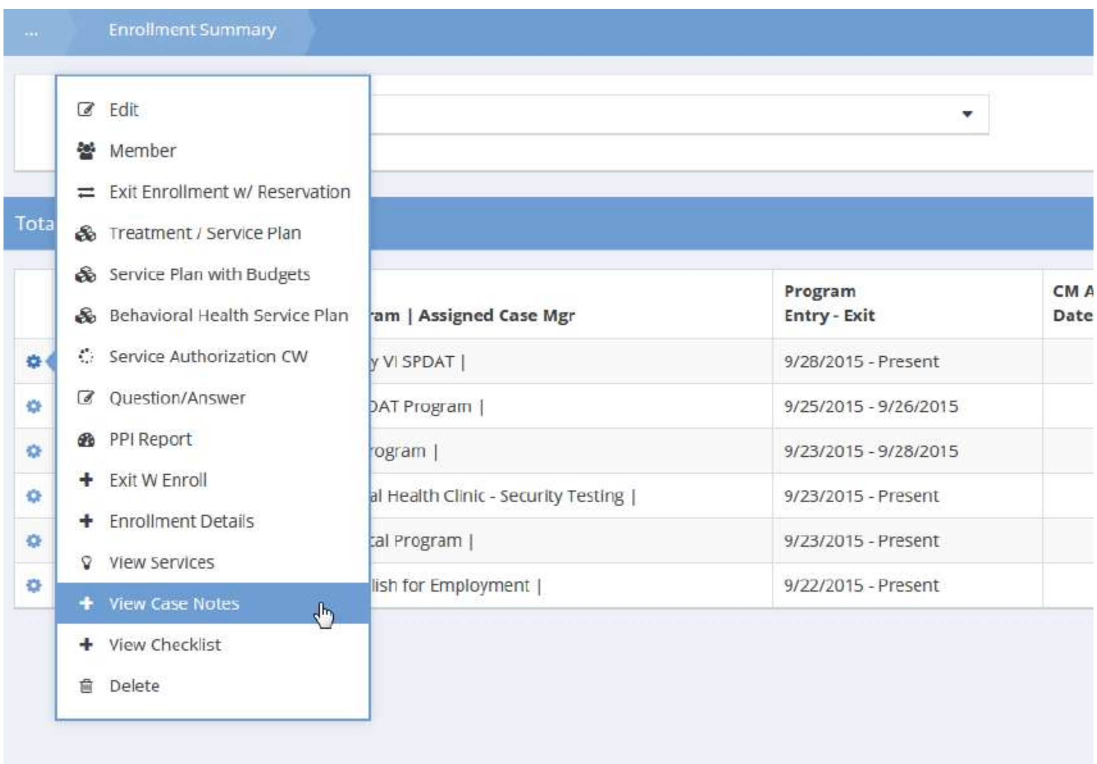
Program Client Case Notes

Objective: View case notes for a program the client is currently enrolled in.

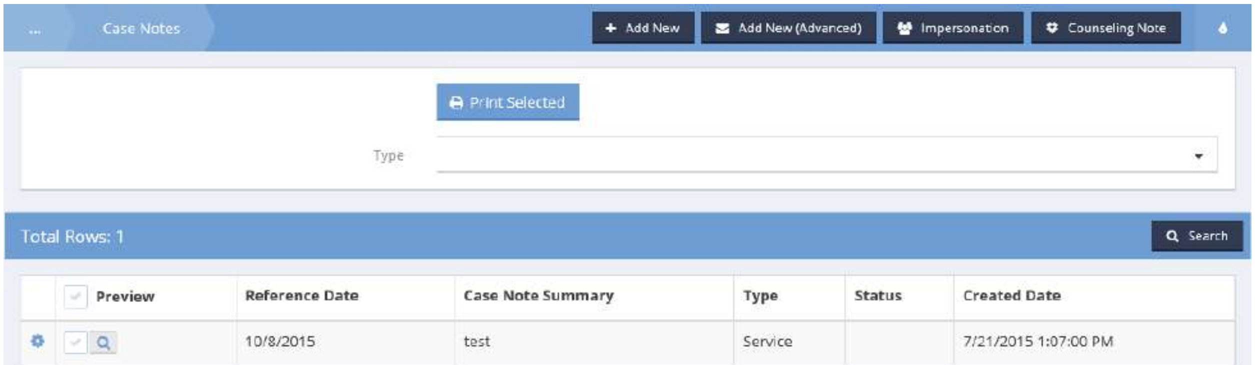
Navigation: Case Management>Case Management>Program Enrollment



The Enrollment Summary form displays. Click the action gear icon associated with the desired enrollment and select View Case Notes from the pop up menu that appears.



The Case Notes form displays all client case notes for the selected program.

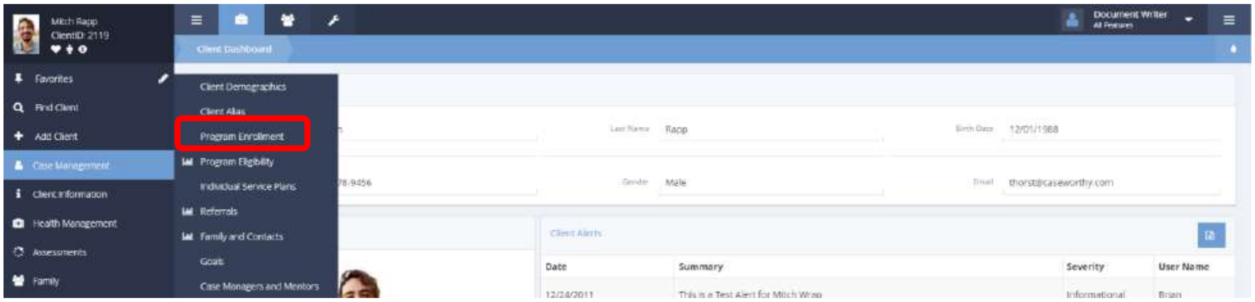


To preview a case note, click on the magnifying glass icon. To print a case note, click the clear checkbox and click on the button. The case note appears in a new pop up window from which it can be printed or saved as a .pdf file. To edit the case note, the time entry, or both…or to delete the case note, click on the action gear icon associated with the desired case note and select from the pop up menu that appears.

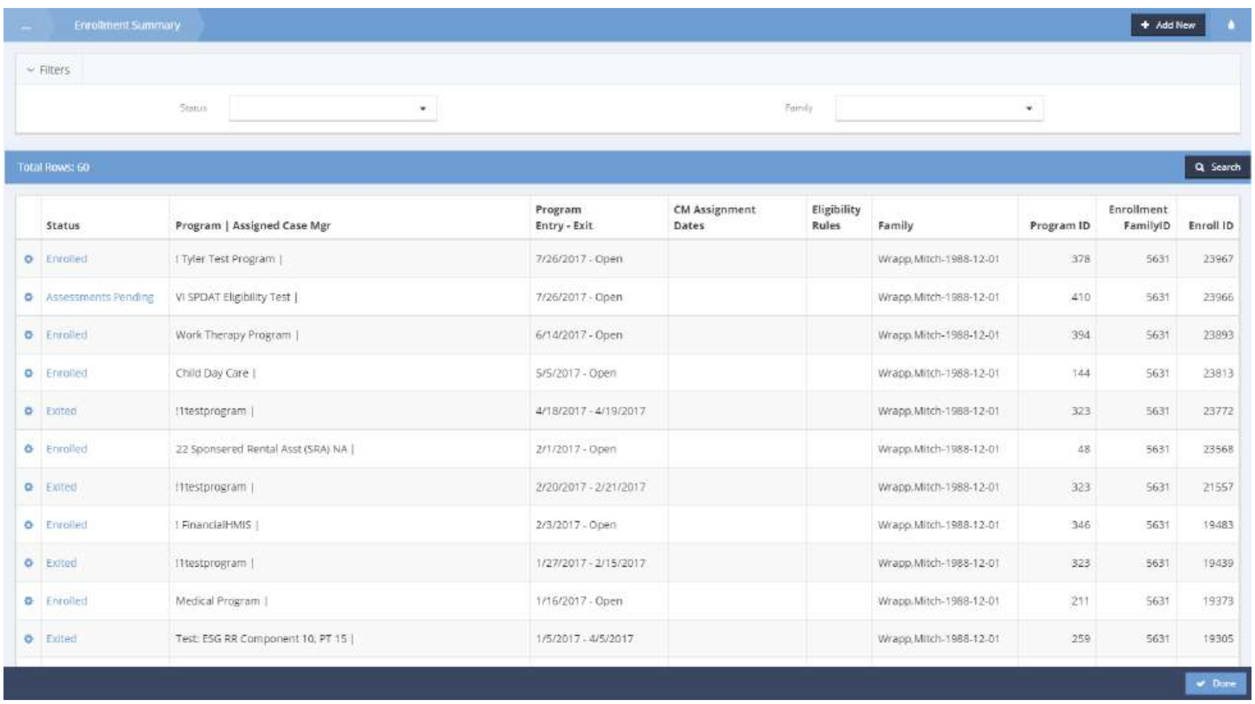
Edit Class

Objective: Adjust the begin and end date for a class.

Navigation: Case Management>Program Enrollment>...Edit Class

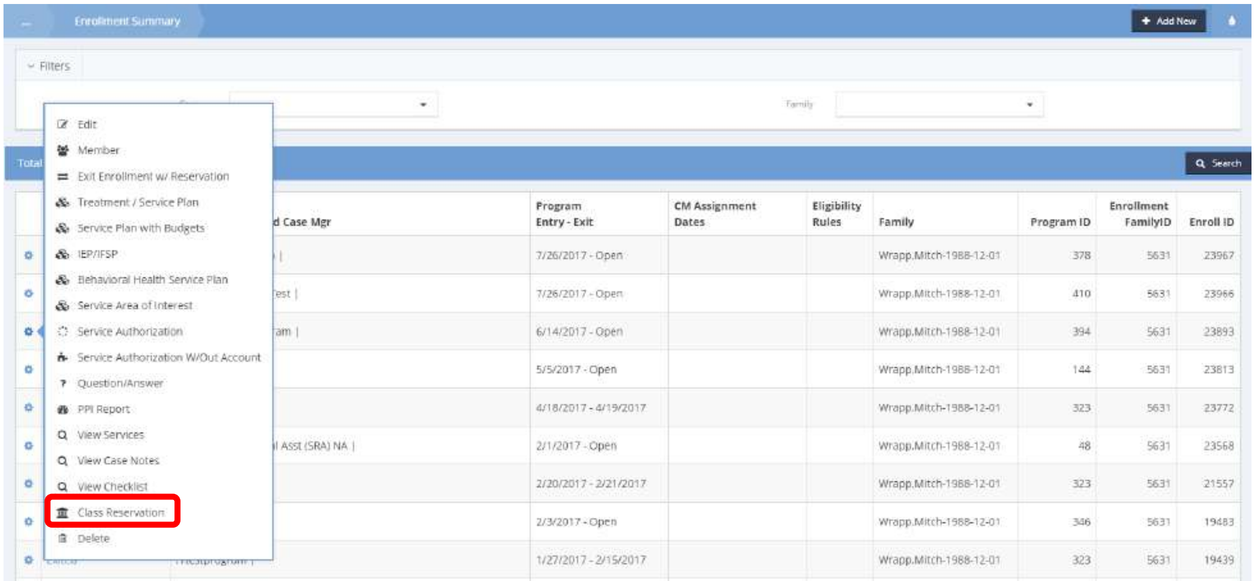


Under the Case Management tab, select Program Enrollment from the Case Management pop-up menu. The Enrollment Summary form displays a list of all programs connected to the client.



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

A pop-up menu appears.



Click on Class Reservation. The In/Out Event Summary form appears.


In/Out Event Summary

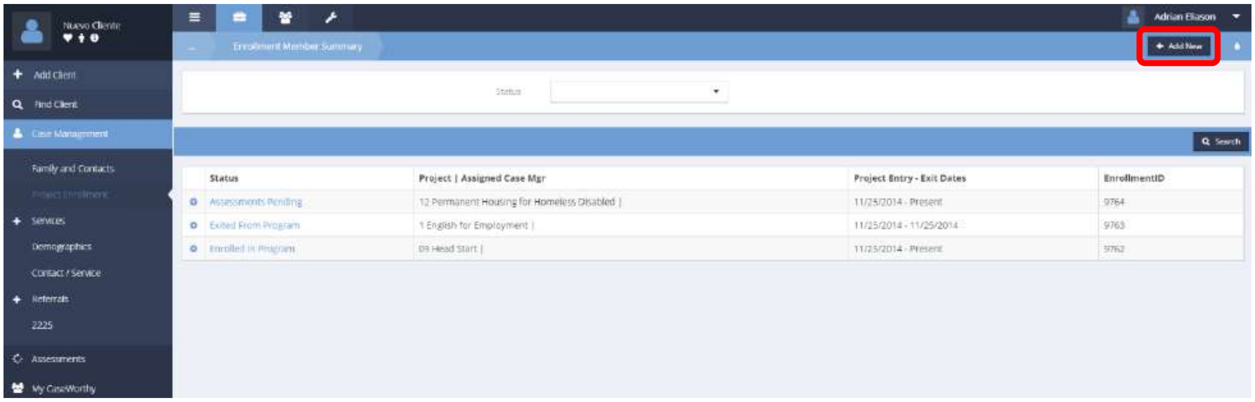
Total Rows: 4

Member ID	Name	Member Enrollment ID	Usage Name	Start Date	End Date
25961	Rapp, Mitch	23893	Breakfast - Cook	9/15/2017	9/15/2017
Edit	Rapp, Mitch	23893	Dinner - Cook	7/5/2017	7/5/2017
25961	Rapp, Mitch	23893	Lunch - Cook	8/13/2017	8/13/2017
25961	Rapp, Mitch	23893	Lunch - Waiter	8/11/2017	8/11/2017

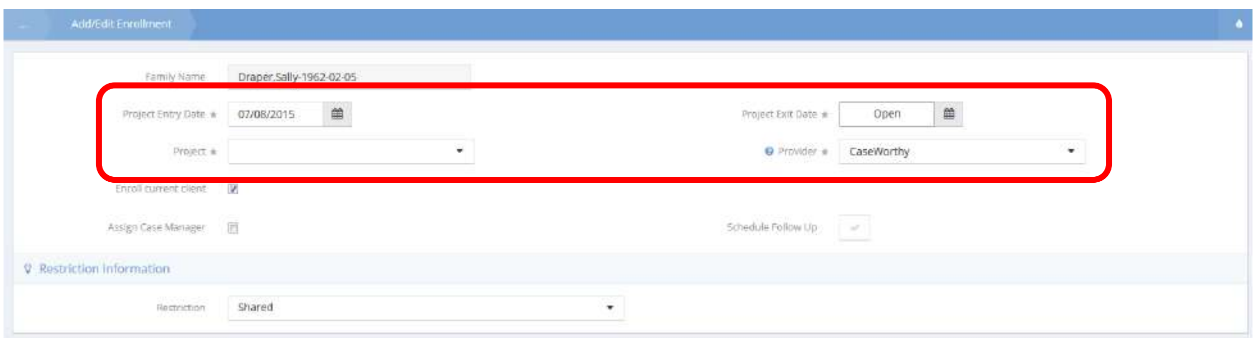
Click on the action gear associated with an event. A pop-up menu appears. Click Edit. The Edit Class form appears.

Click on the icons to adjust the Begin and End dates for the class. Click the Save button to save and exit the form.

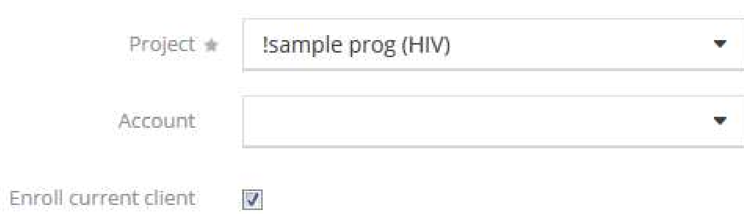
HMIS Enrollment



To add a new enrollment, click on the **+ Add New** button. The Enrollment Add/Edit form displays.



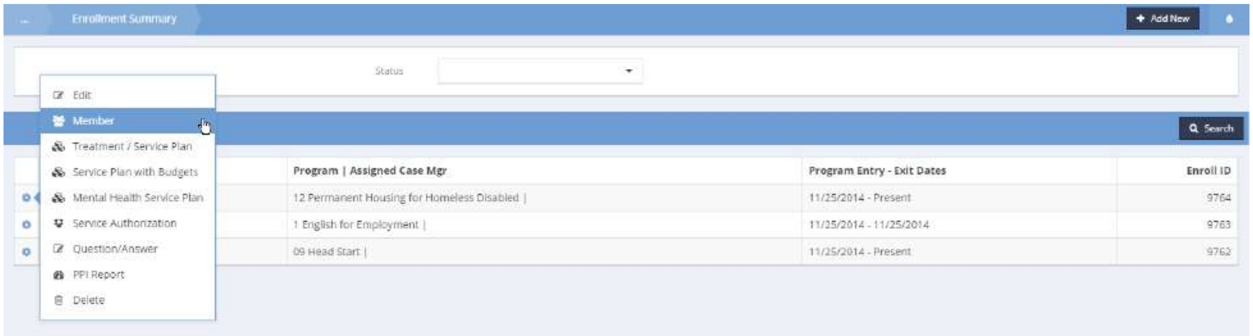
Enter an entry and exit date and select a provider. Select a project from the drop-down list.



After selecting a project, depending on the selected project, the Account field may display. If relevant, select an account for the enrollment.

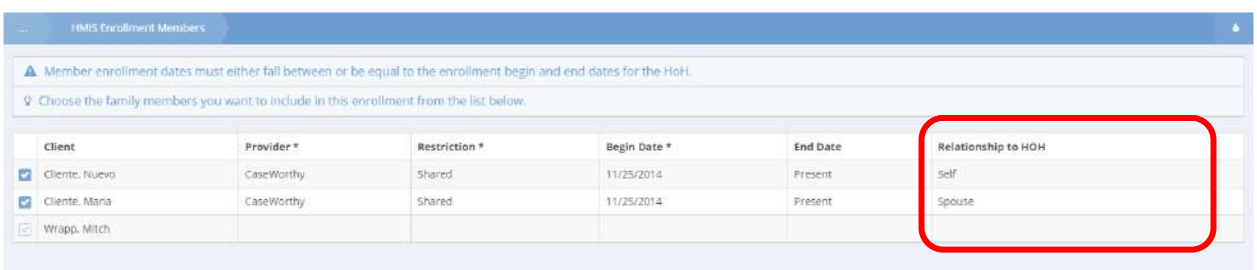
Click Save when finished.

To edit an existing enrollment, click on the action gear icon associated with the desired enrollment and select Member from the popup menu that appears.



The HMIS Enrollment Members for Case Management form displays.

Click on the Add / Edit Members button. The HMIS Enrollment Members form displays a list of family members. Those with a blue checkbox are enrolled in the project, those with a clear checkbox are not.



Click on the checkbox associated with any member and edit the expanded row for blue checkboxes and enter enrollment data for clear checkboxes.

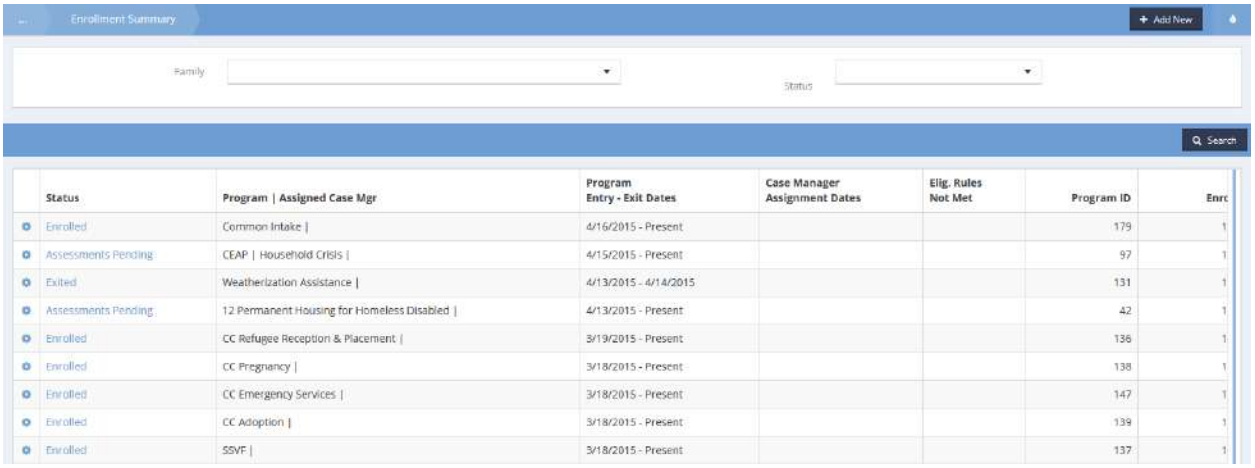
2014 HUD Standards require a new field to capture the relationship to head of household specific to enrollment allowing different family compositions for each individual project enrollment. On this form, the relationship to HOH defaults to the relationship setup on the Add Family Member form. Changes made on the enrollment relationship to HOH only affect the family composition for this enrollment. For example, a household with two adults and three minors might have an adult HOH, but if the three minors were to enroll in a program without the adults, one would need to be set as the HOH on the Add Enrollment Members form. HUD reports family member composition by enrollment.

When finished, click on the 

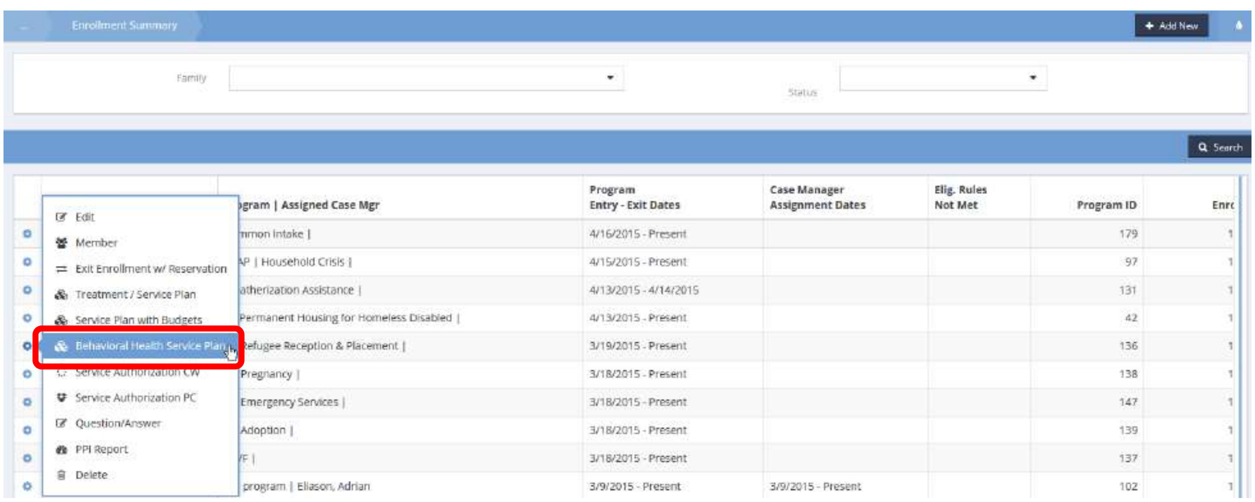
button.

Enrollment Service Plan Mental Health (summary)

Objective: Edit and manage mental health service plan enrollment.

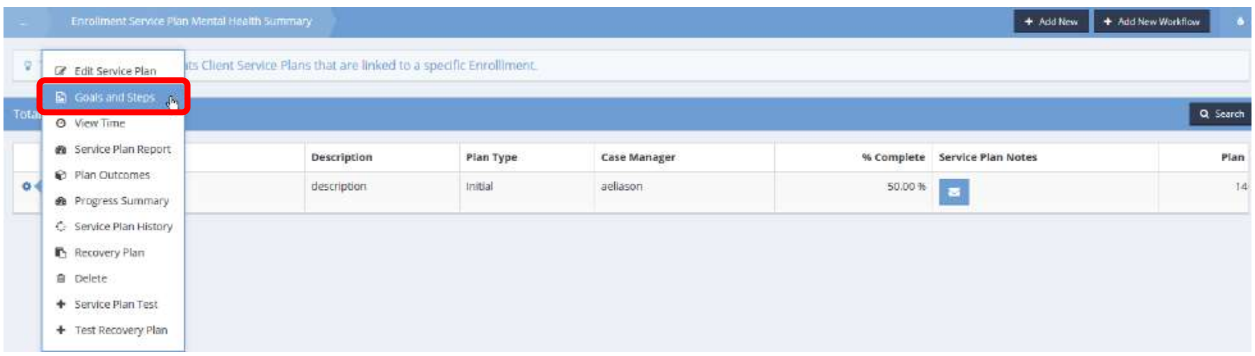


The Enrollment Member Summary form displays. Click on the action gear  icon associated with the desired enrollment and select Behavioral Health Service Plan from the pop up menu that appears.

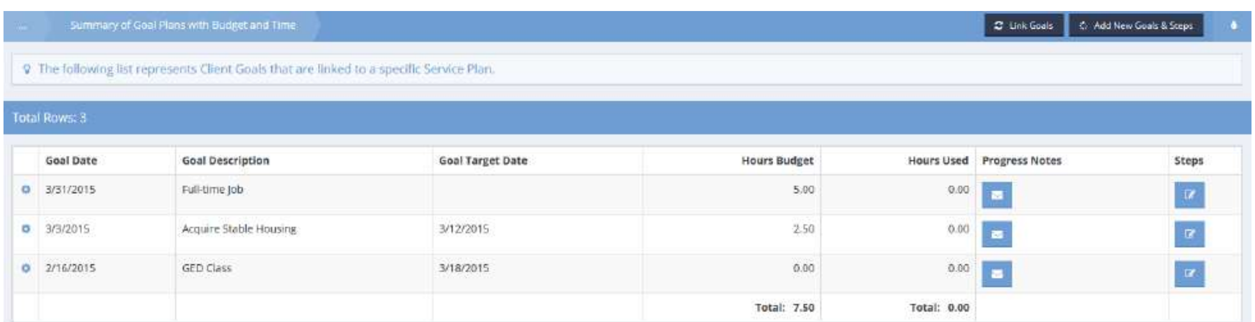


The Enrollment Service Plan Mental Health Summary form displays.

Click on the action gear icon associated with the desired service plan and select Goals and Steps from the pop up menu that appears.

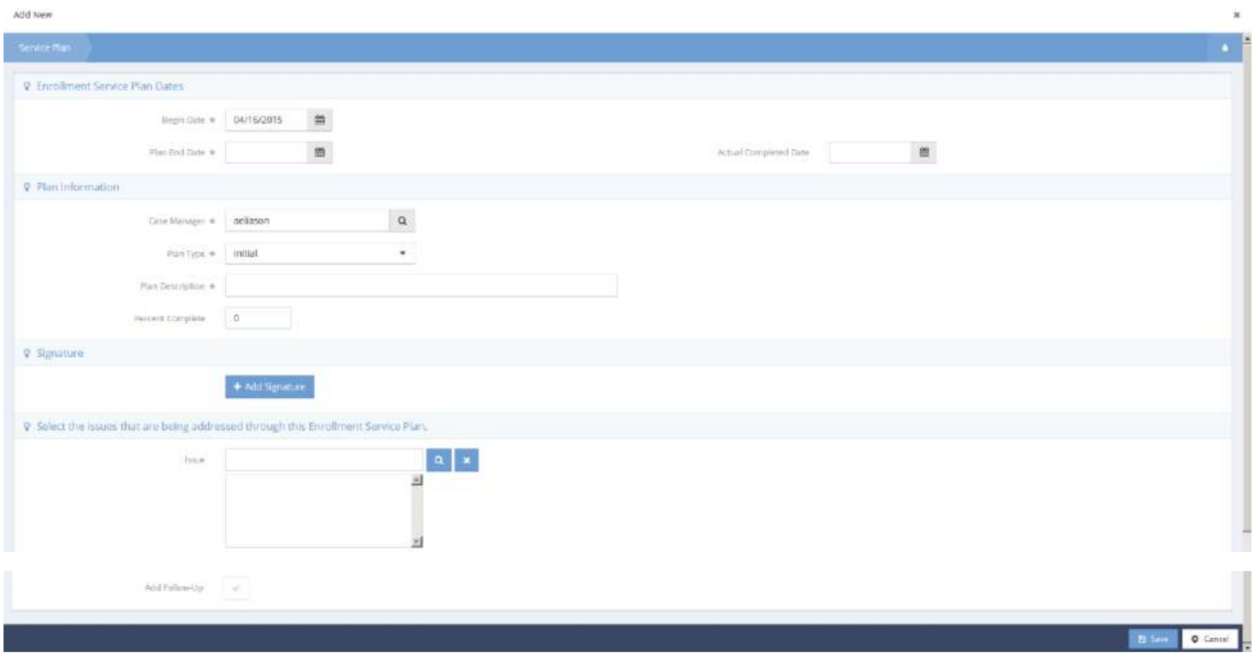


The Summary of Goal Plans with Budget and Time form displays.

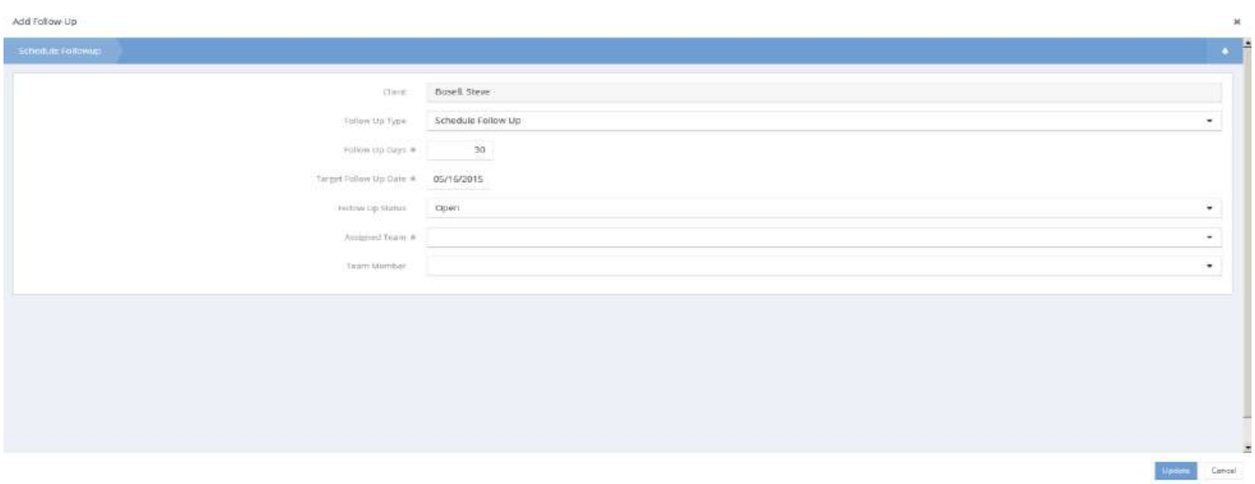


Mental Health Service Plan (Input)

On the Enrollment Service Plan Mental Health Summary form, click on the **+ Add New** button. The Add New form displays.



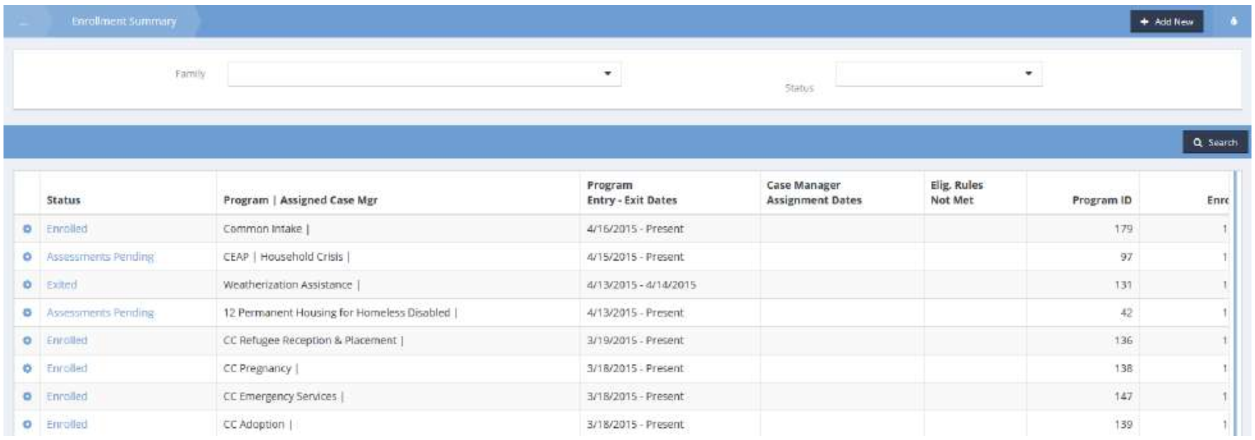
Enter the Enrollment Service Plan Date information. Enter the Plan Information, changing the Case Manager and Plan Type if desired and adding a plan description and percent complete value. Add signatures if desired and enter any issues addressed by the plan. To schedule a follow up, check the Add Follow-Up checkbox. The Schedule Follow Up form displays.



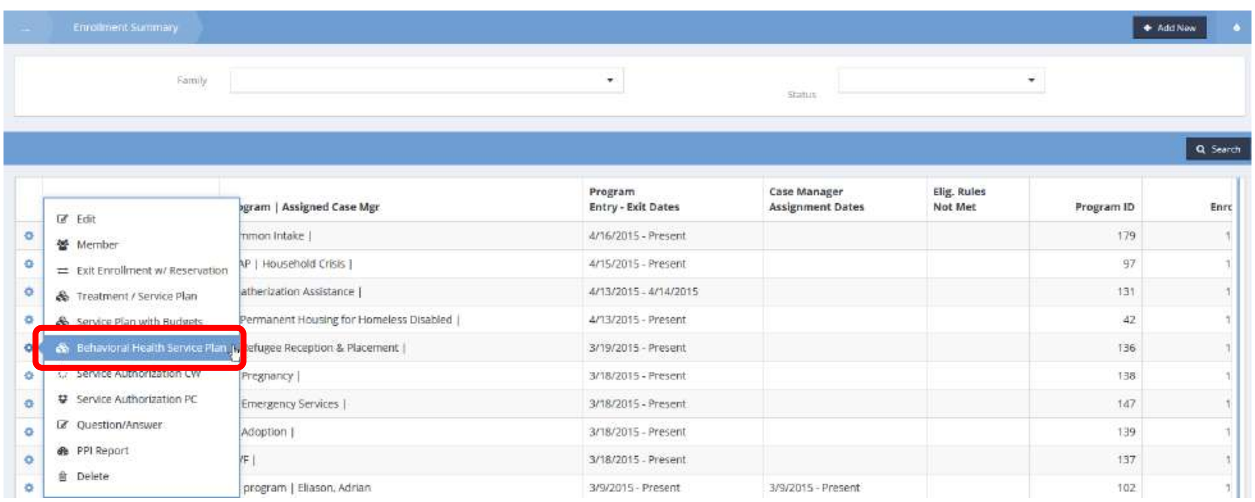
Enter the desired follow up information and click on the **Update** button. Click on the **Save** button.

Goal Progress Note and Service Plan Note

Objective: Enter and edit notes relating to service plans and progress.



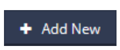
Click on the action gear icon associated with the desired program enrollment. Select Behavioral Health Service Plan from the pop up menu that appears.



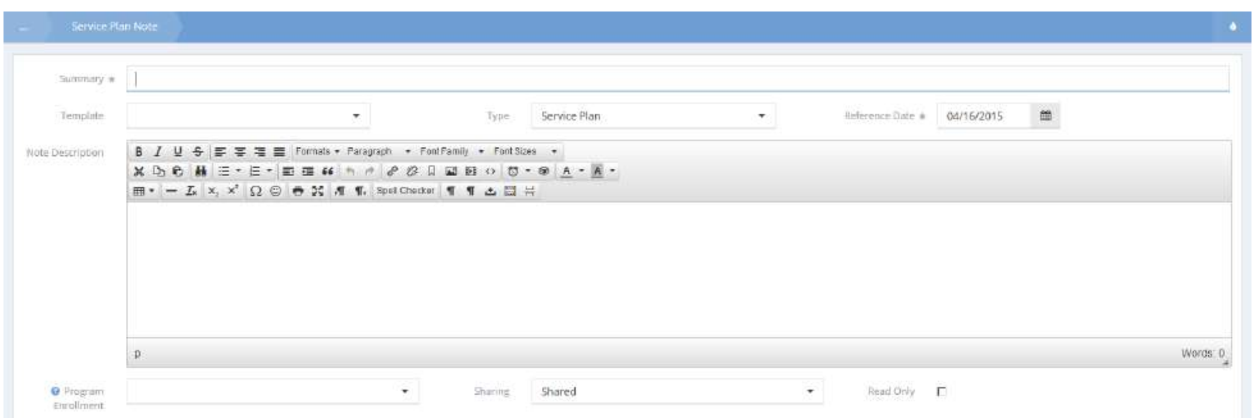
The Enrollment Service Plan Mental Health Summary form displays.

Service Plan Note

Click on the  icon in the Service Plan Notes column associated with the desired service plan. The Service Plan Case Notes Summary form displays.

Click on the 

button. The Edit Service Plan Note form displays.

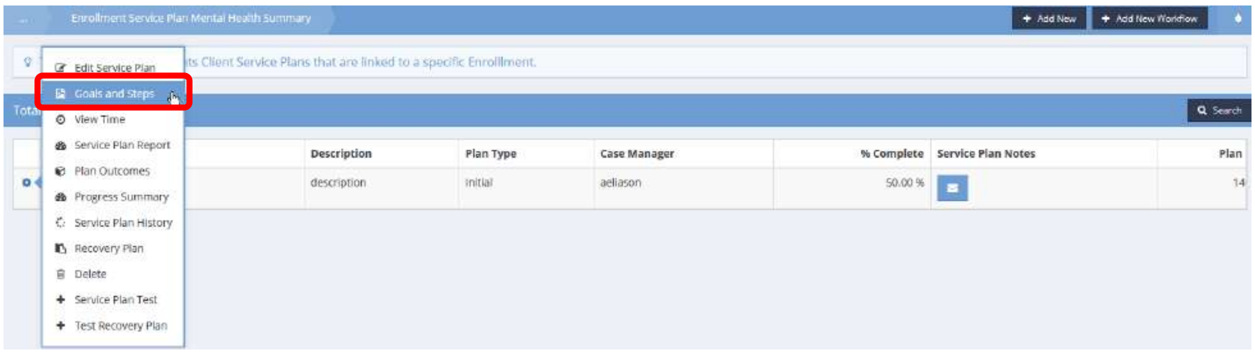


Enter a summary of the notes. Select values from the drop-down lists for note template and note type. Enter the date to which the notes refer in the reference date field. Enter the notes and, if desired select a program from the drop-down list and indicate the level of sharing for the note. To protect the note from editing, check the read only checkbox. When finished, click on the 

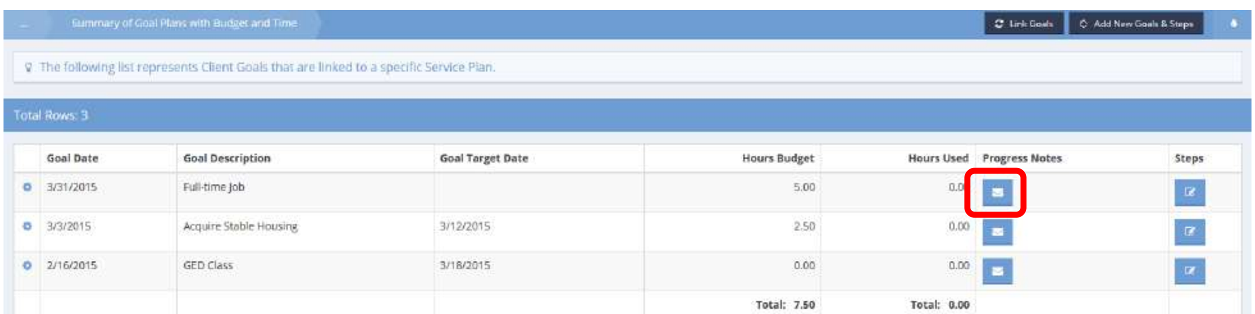
button.

Goal Progress Note

From the Enrollment Services Plan Mental Health (Summary) form, click on the action gear icon associated with the desired plan. Select Goals and Steps from the pop up menu that appears.



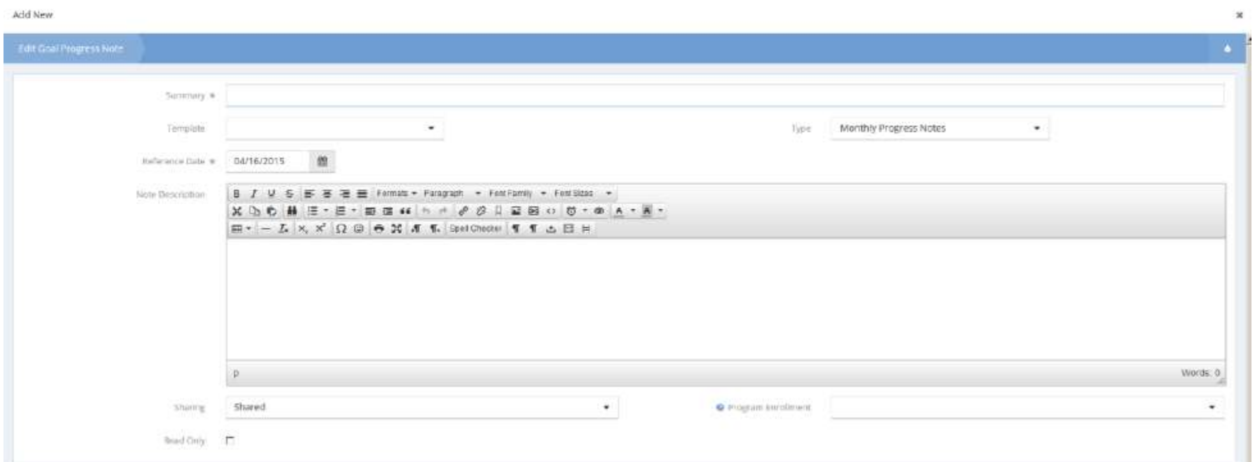
The Summary of Goal Plans with Budget and Time form displays.



Click on the icon in the progress notes column of the desired goal. The Progress Notes Summary by Goal form displays.

Click on the **+ Add New** button.

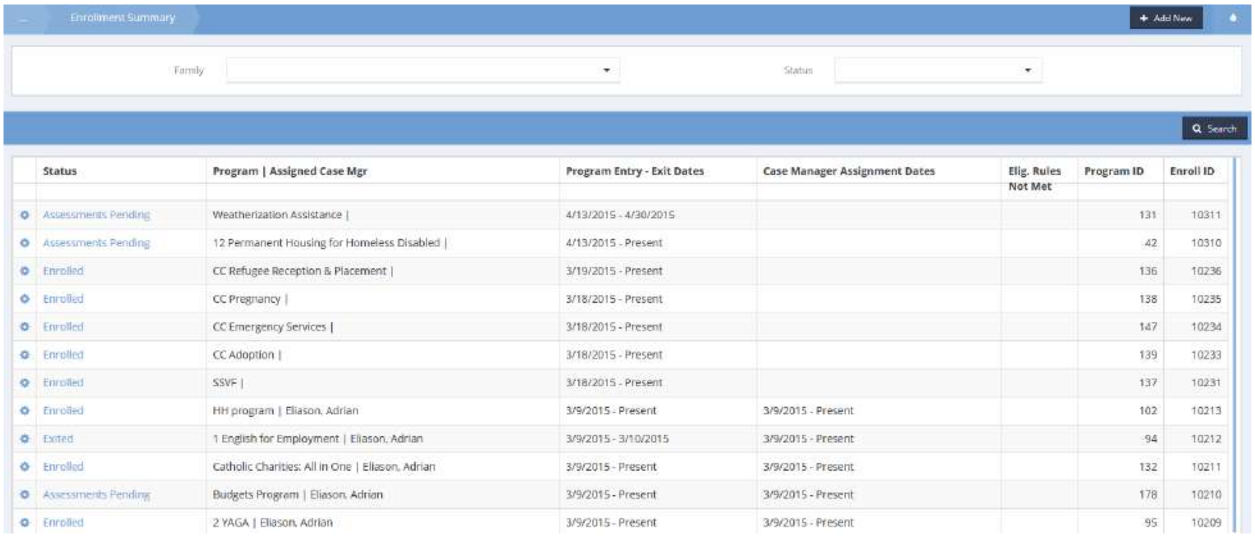
The Add New form displays.



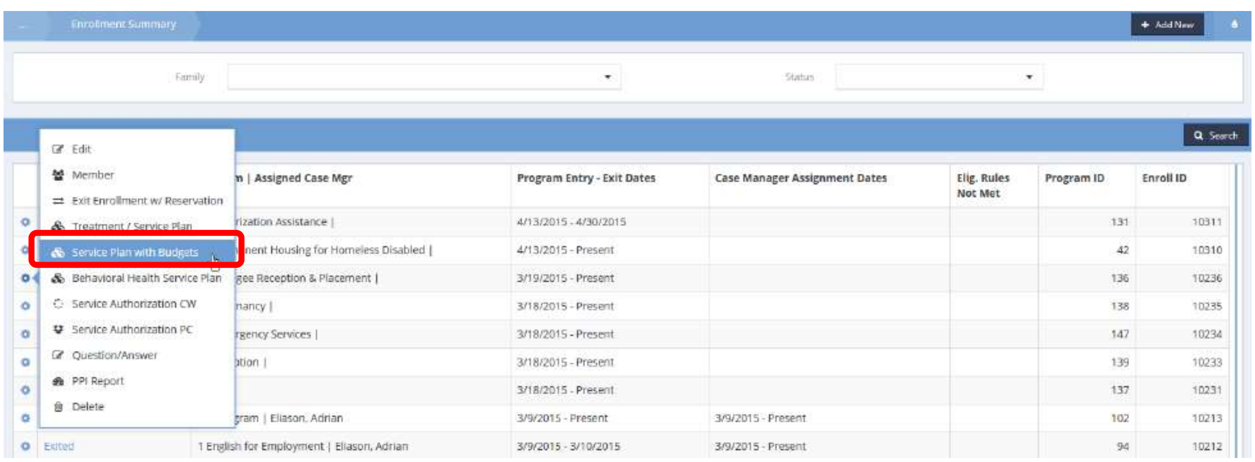
Enter a summary of the notes. Select values from the drop-down lists for note template and note type. Enter the date to which the notes refer in the reference date field. Enter the notes and, if desired select a program from the drop-down list and indicate the level of sharing for the note. To protect the note from editing, check the read only checkbox. When finished, click on the Save button.

User Client Time with Budgets (Edit)

Objective: Edit user client time with budgets.

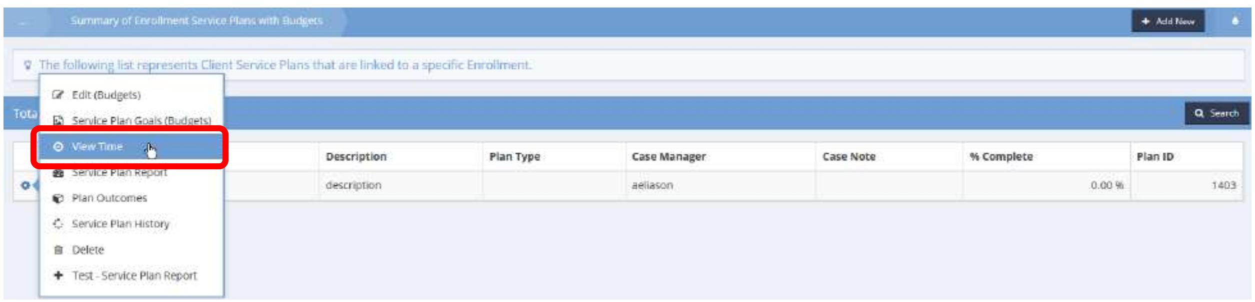


From the Enrollment Summary form, locate the desired entry and click on the action gear icon associated with it. Select Service Plan with Budgets.



The Summary of Enrollment Service Plans with Budgets form displays.

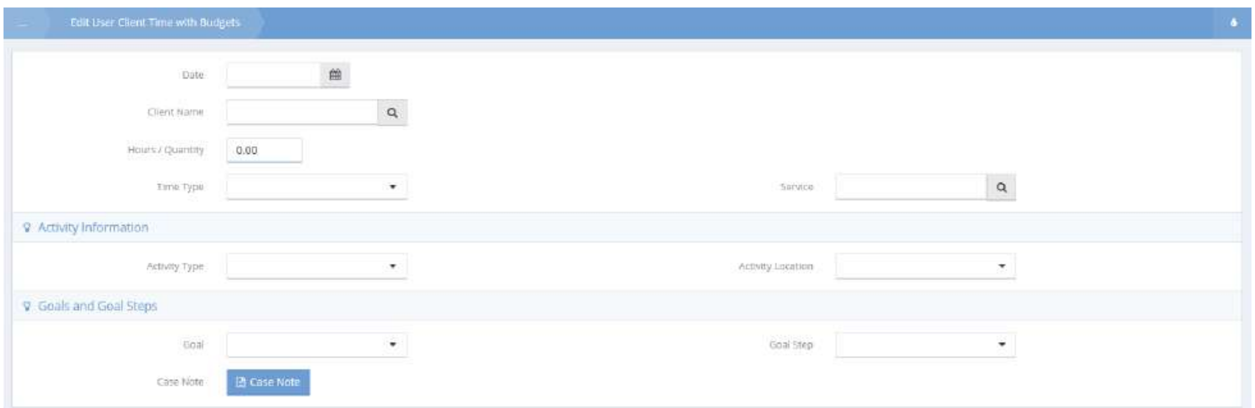
Locate the desired entry and click on the actin gear icon associated with it. Select View Time from the pop-up menu that appears.



The Client Service Plan Time form displays.

Locate the desired entry and click on the action gear icon associated with it. Select Edit Time with Budgets from the pop-up menu that appears.

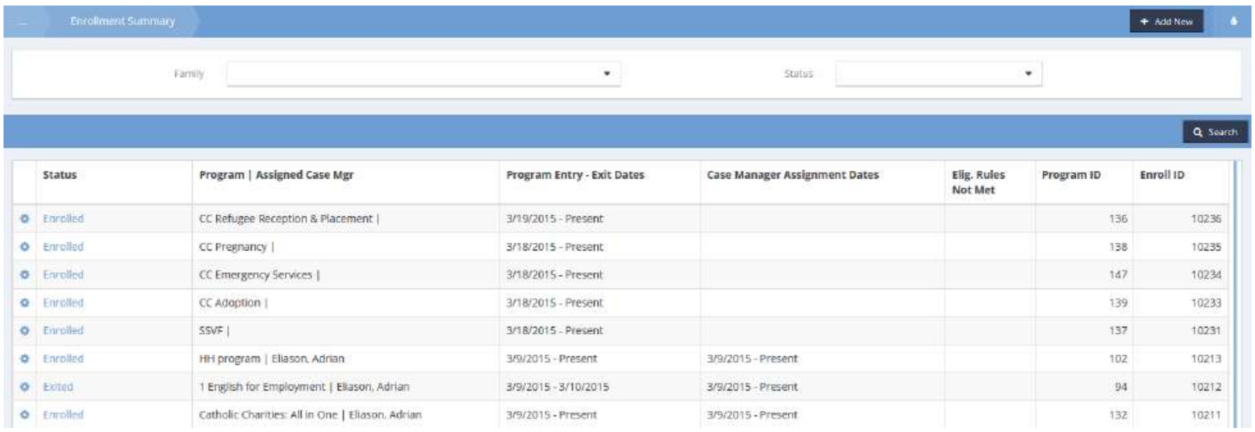
The Edit User Client Time with Budgets form displays. Make any desired changes and click on the Save button.



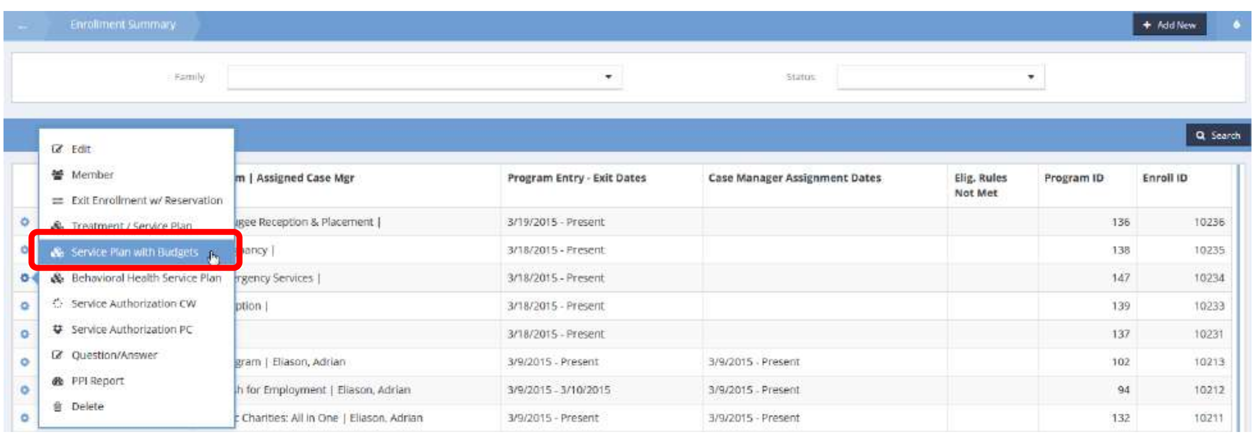
Plans to Goals w/ Budgets (Spreadsheet)

Objective: Select goals from a list of potential goals based upon service plan.

Locate the desired program with Enrolled In Program status and click on the action gear icon associated with it.

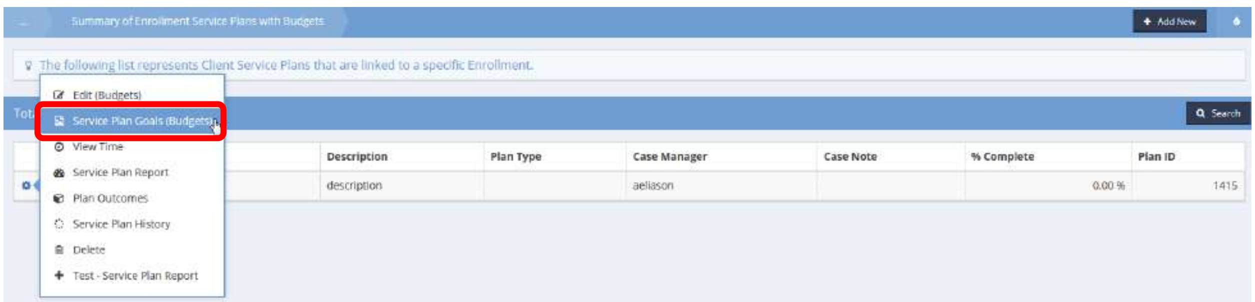


Select Service Plan with Budgets from the pop up menu that appears.

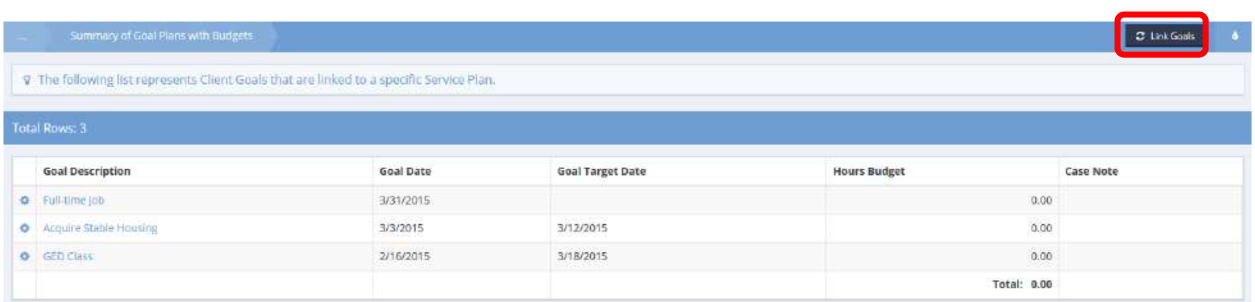


The Enrollment Service Plan with Budgets (Summary) form displays. Locate the desired service plan and click on the action gear icon associated with it.

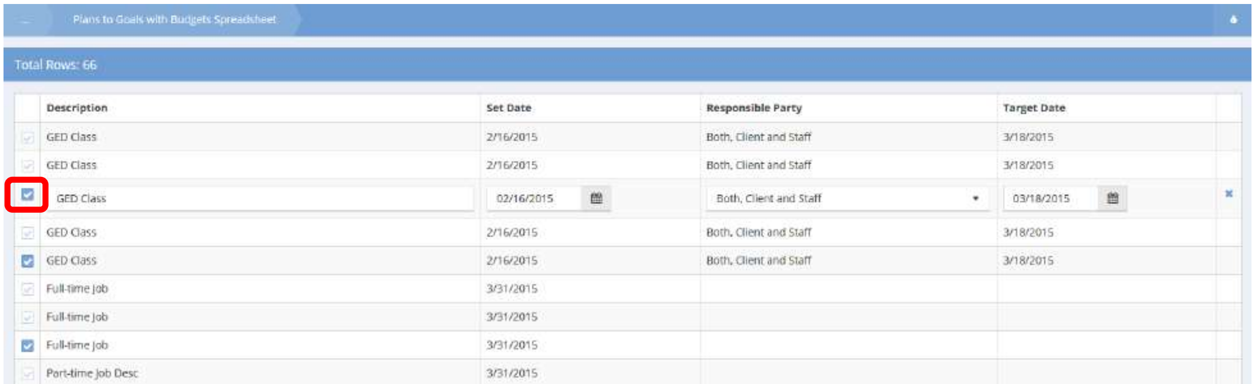
Select Service Plan Goals (Budgets) from the pop up menu that appears.



The Goal Plan with Budget (Summary) form displays.



Click on the Link Goals button. The Plans to Goals w/budgets (Spreadsheet) displays.


Plans to Goals with Budgets Spreadsheet

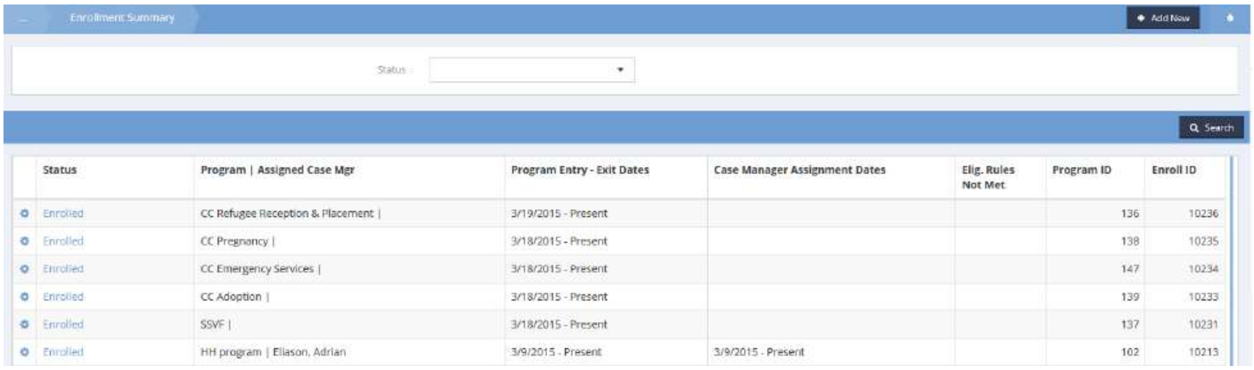
Total Rows: 66

	Description	Set Date	Responsible Party	Target Date
	GED Class	2/16/2015	Both, Client and Staff	3/18/2015
	GED Class	2/16/2015	Both, Client and Staff	3/18/2015
	GED Class	02/16/2015	Both, Client and Staff	03/18/2015
	GED Class	2/16/2015	Both, Client and Staff	3/18/2015
	GED Class	2/16/2015	Both, Client and Staff	3/18/2015
	Full-time Job	3/31/2015		
	Full-time Job	3/31/2015		
	Full-time Job	3/31/2015		
	Part-time Job Desc	3/31/2015		

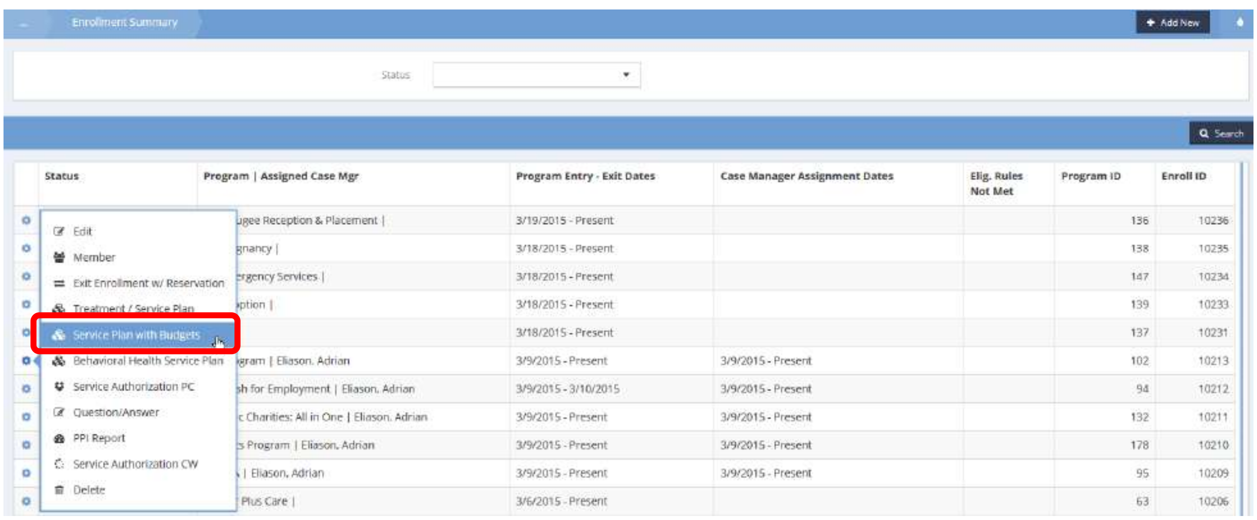
Select the desired goals by clicking on the clear checkbox associated with it and click on the Save button.

Client Goal Steps w/budgets (2)

Objective: Add or edit client goal steps including budget information.



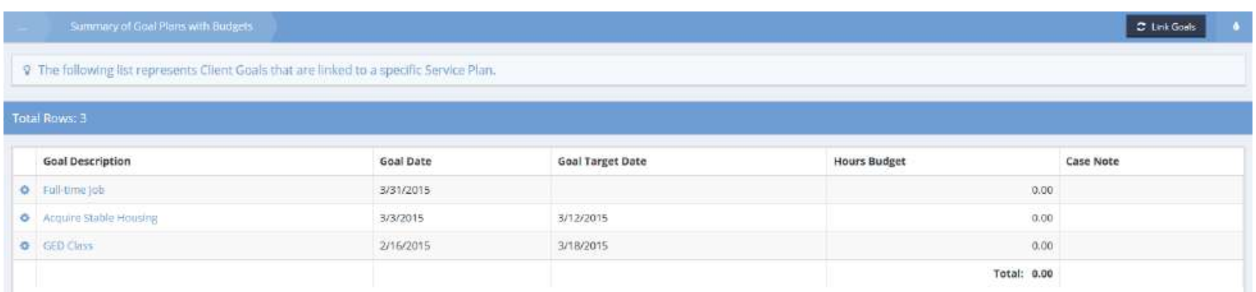
For the desired program, click on the action gear and select Service Plan with Budgets from the pop-up menu.



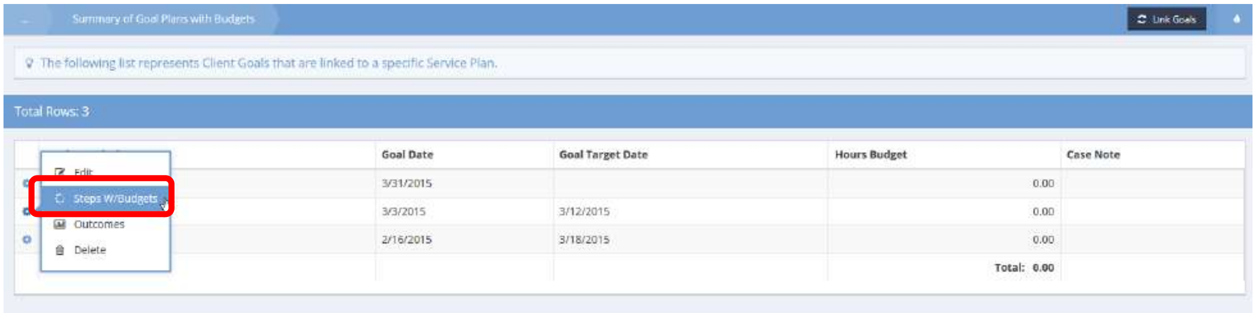
The Enrollment Service Plan with Budgets form displays.

For the desired service plan, click on the action gear and select Service Plan Goals (Budgets) from the pop-up menu.

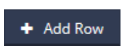
The Summary of Goal Plans with Budgets form displays.

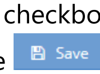


From the action gear  pop-up menu for the desired goal, select Steps w/ Budgets.

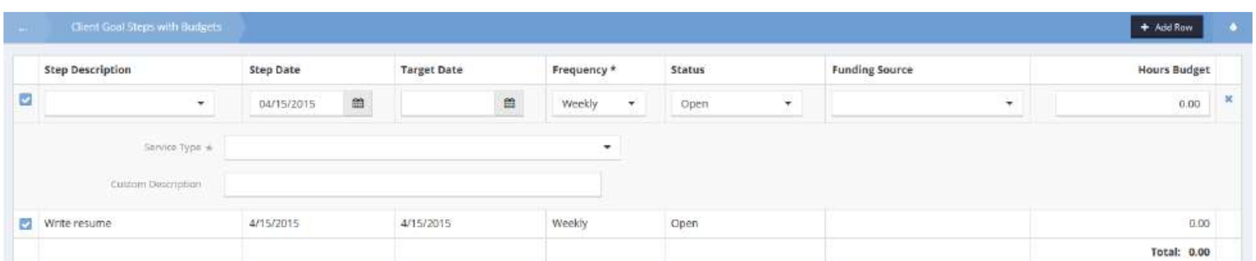


The Client Goal Steps with Budgets form displays.

To add a new step, click on the 

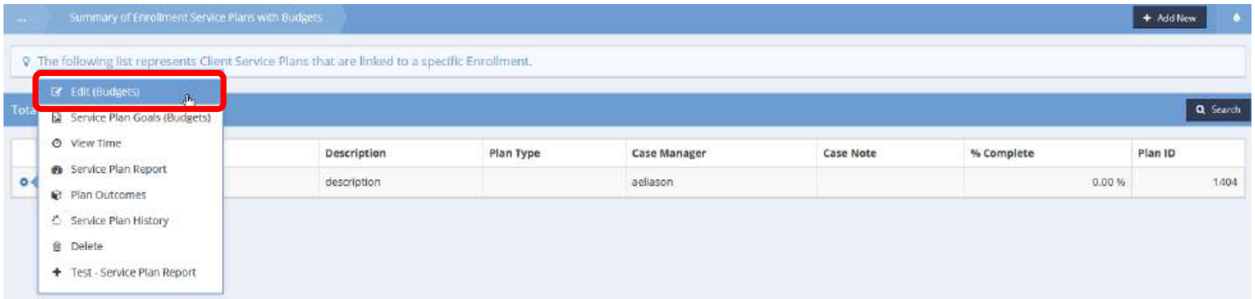
button. To edit an existing step, click on the blue checkbox  associated with it. An expanded row displays. Enter the desired information and click on the 

button.

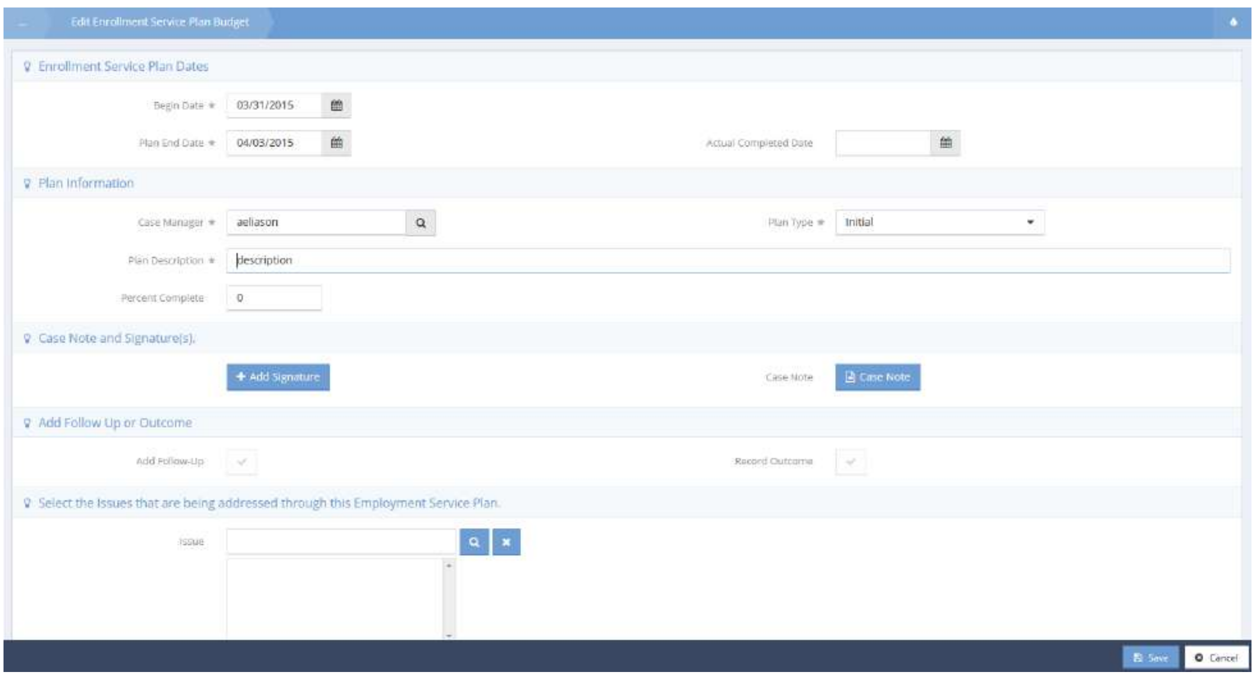


Edit Enrollment Service Plan Budget

For the desired service plan, click on the action gear and select Edit (Budgets) from the pop-up menu.



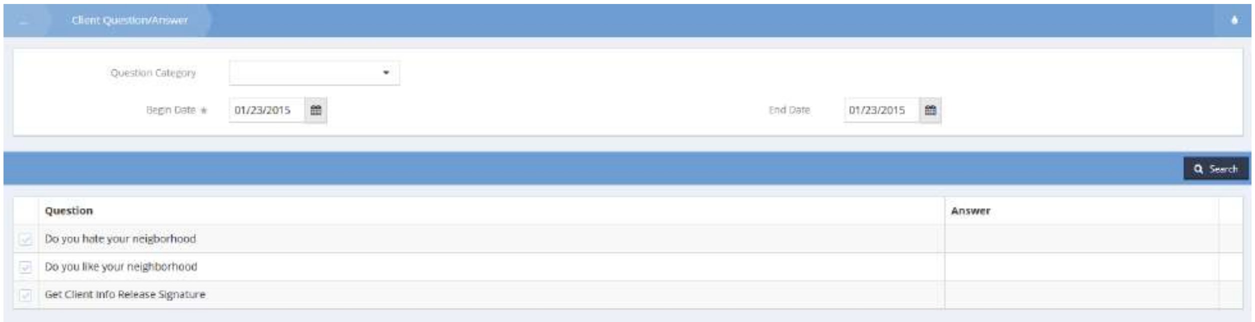
The Edit Enrollment Service Plan Budget form displays.



Make any changes desired and click on the Save button.

Question/Answer

The Client Question/Answer form displays questions and answers relevant to the current enrollment. Use the search field to filter the list. To edit an answer, click the clear checkbox and select an answer from the drop-down list.



PPI Report

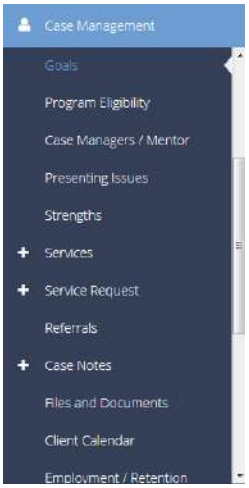
To view a PPI Report for a program, simply click the action gear and click PPI Report.

The report displays in a new window.

Delete

When Delete is selected, the program enrollment is deleted and no longer appears on the Enrollment Member Summary list.

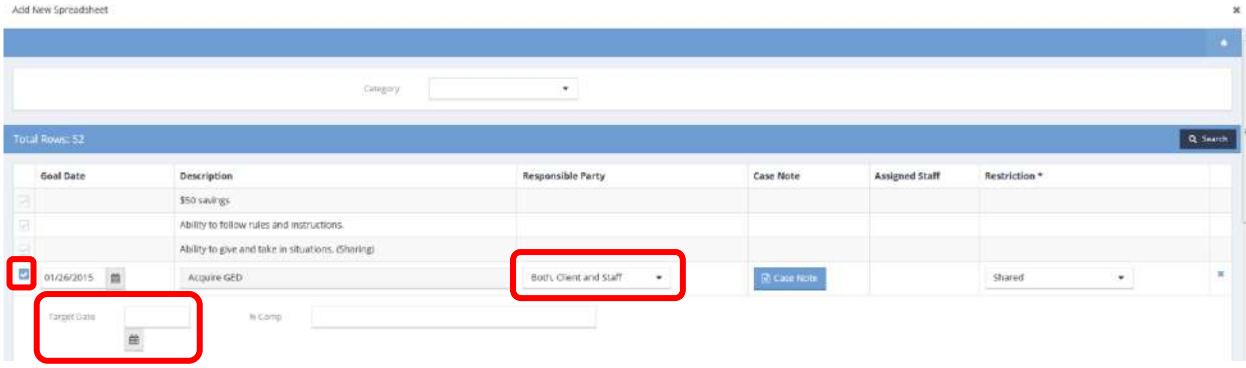
Goals



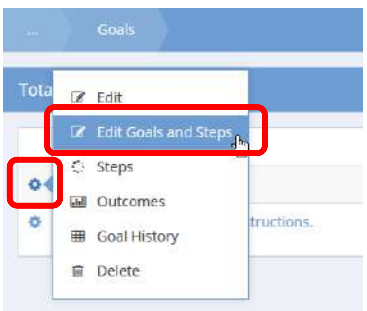
The next menu item in the Case Management menu group is the "Goals" summary form. This form allows users to enter and track a client's goals and the steps it takes to accomplish them.

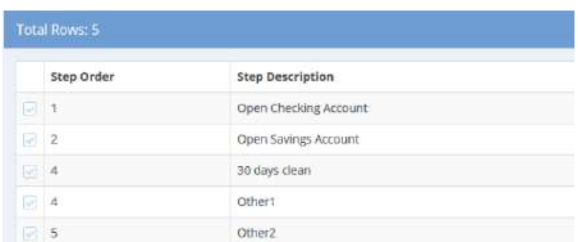
There are two options for adding a new goal – adding goals only via a spreadsheet, or adding goals and goal steps on a single combined form. To add goals only, click the **Add New Spreadsheet** button. To enter goals and goal steps click the **Add New Goals / Steps** button. From the action gear icon, the user can edit a goal, or link the goal to goal steps, or outcomes. The user can also review changes made to a goal over time by clicking on "Goal History."

Add New Spreadsheet to enter Goals only:



Click the clear checkbox next to the goal to select it. Add a target date for goal completion, and a responsible party (client, staff or both). If the client makes progress toward completing their goal, a percentage of completion may be entered. If the user desires to add goal steps, access the action gear on the Goal summary form.

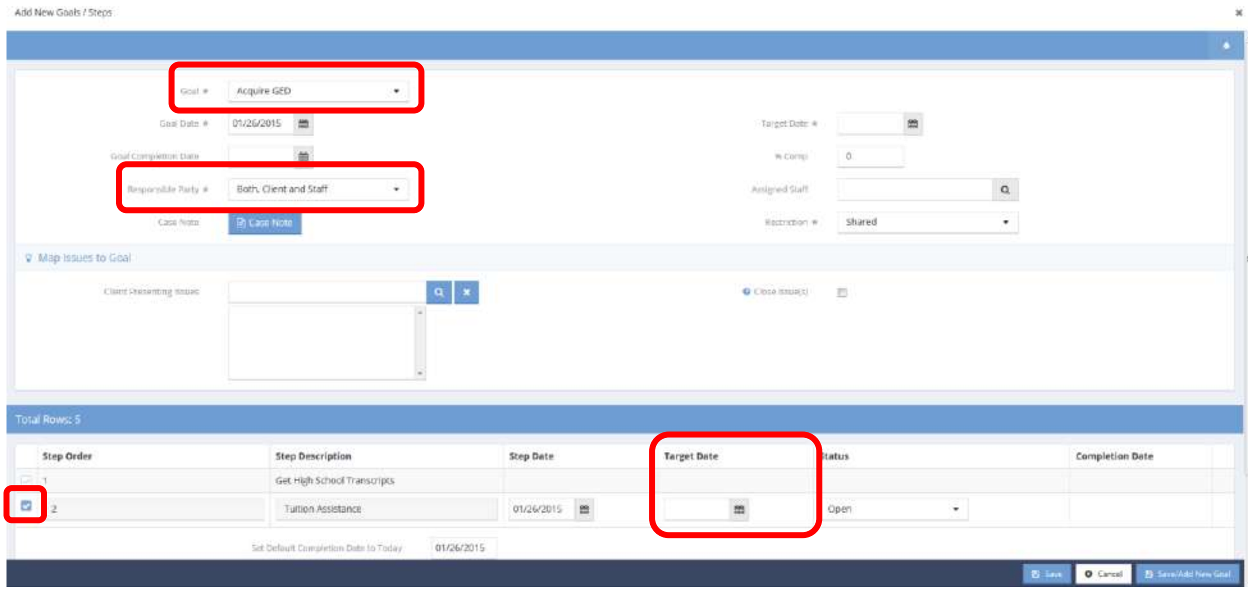



Total Rows: 5

Step Order	Step Description
1	Open Checking Account
2	Open Savings Account
4	30 days clean
4	Other1
5	Other2

Click "Steps" under the action gear icon to add goal steps. Click the clear checkbox next to the goal step to select it.

Add New Goals/Steps:

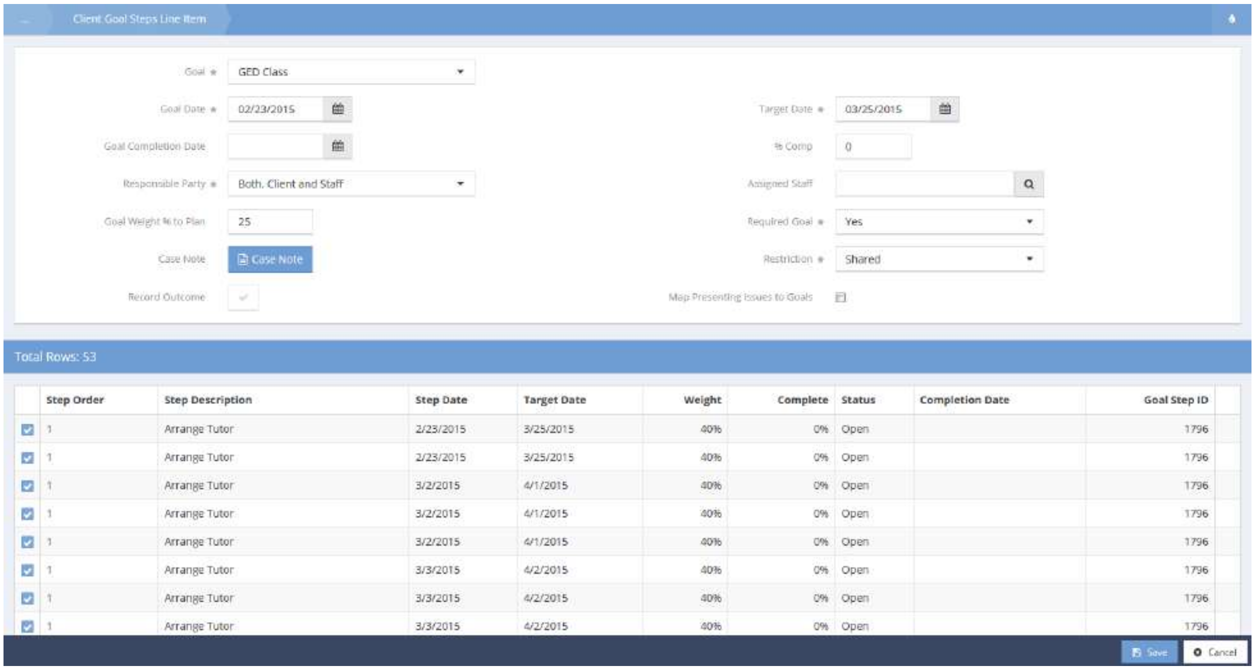


Select the desired goal from the drop-down list. Enter a target date and responsible party. If desired use the look-up field to identify the assigned staff. Click the clear checkbox and set a target date for desired Goal Steps.

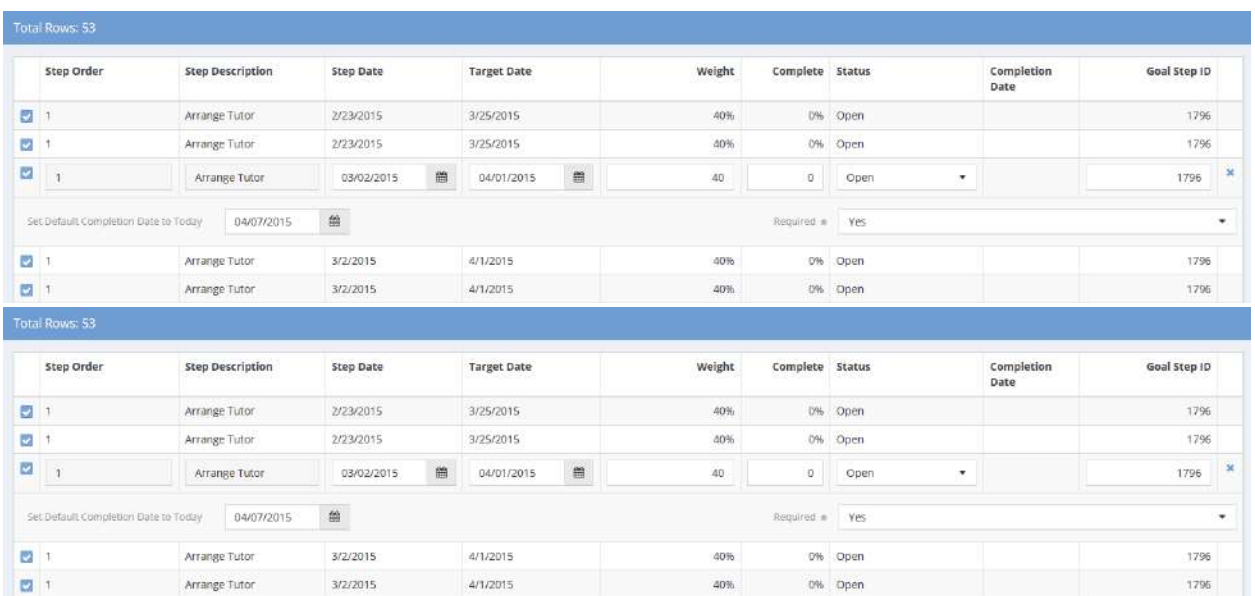
Edit Goals and Steps:

Select 'Edit Goals and Steps' from the action gear drop-down menu for the desired goal.

The Client Goal Steps Line Item form displays.

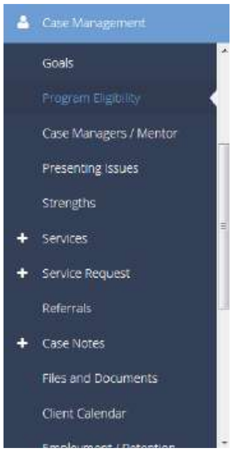


Edit the goal information as desired and/or select one of the goal steps by clicking on the circle to the left of the step description. The step is expanded.



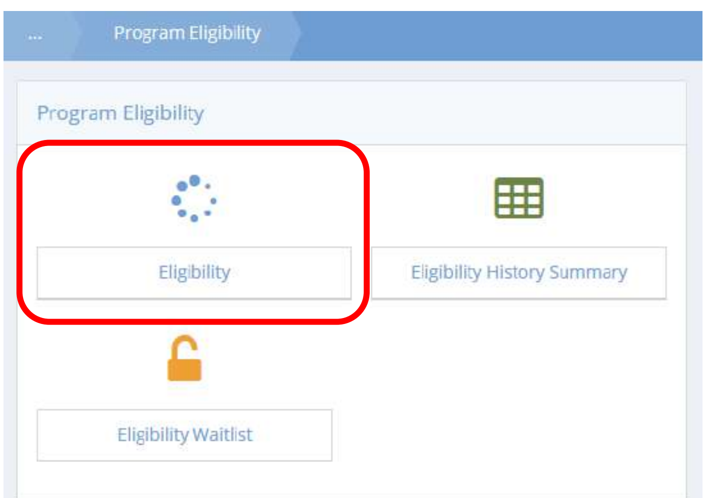
Edit the step as needed. When finished with goal and step editing, click on the Save button.

Program Eligibility



The next item on the Case Management menu is the Program Eligibility dashboard. This functionality allows the user to search and find all programs with eligibility rules that match the client's related information. This feature requires administrative set-up, be sure to consult with a CaseWorthy, Inc. program manager before using this functionality.

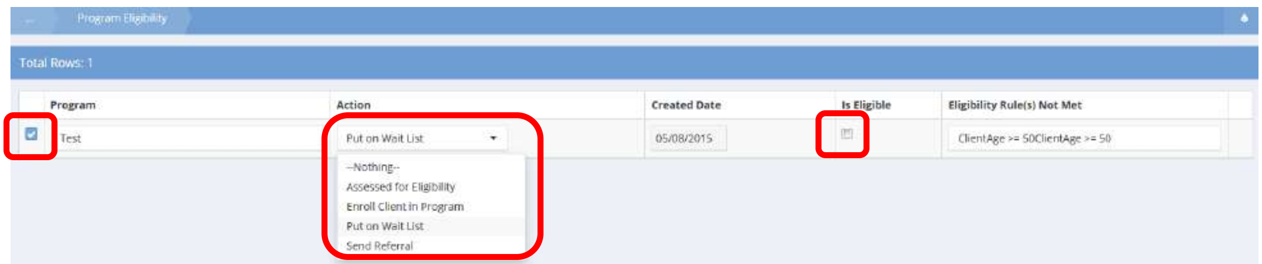
Eligibility



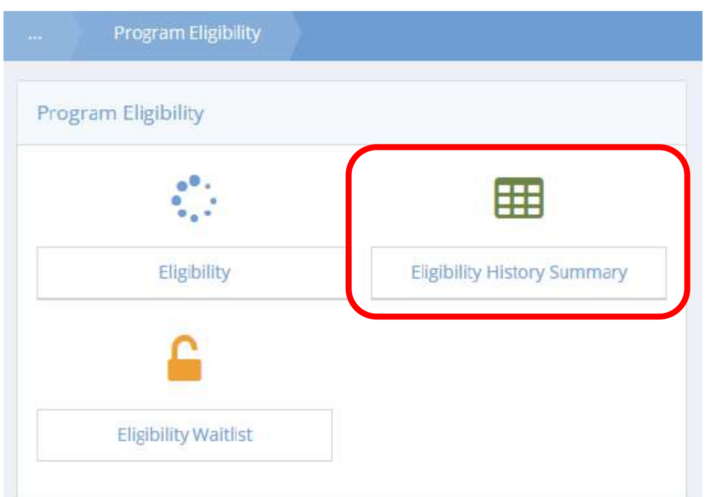
Click the Eligibility icon to view program eligibility.

The Program Eligibility form displays.

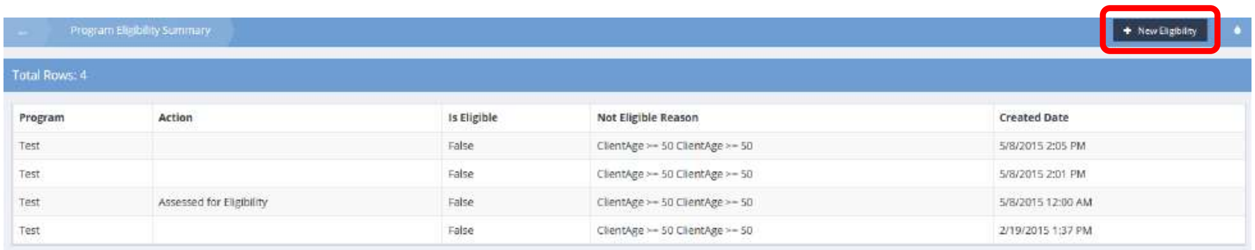
To make any changes to an item, click the clear checkbox icon. Select an action from the drop-down list and check Is Eligible if desired. Click the Save button when finished.



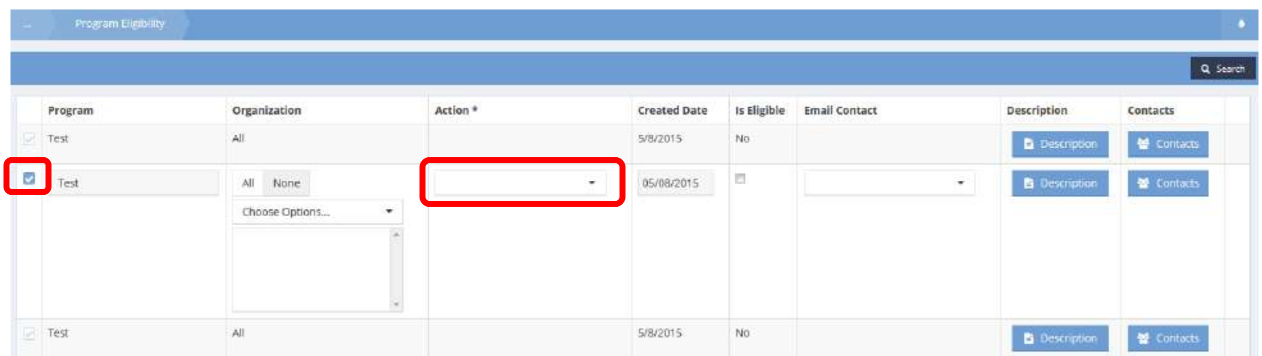
Eligibility History Summary



The Eligibility History Summary displays a history of a client's program eligibility. To add a new eligibility, click the + New Eligibility button.

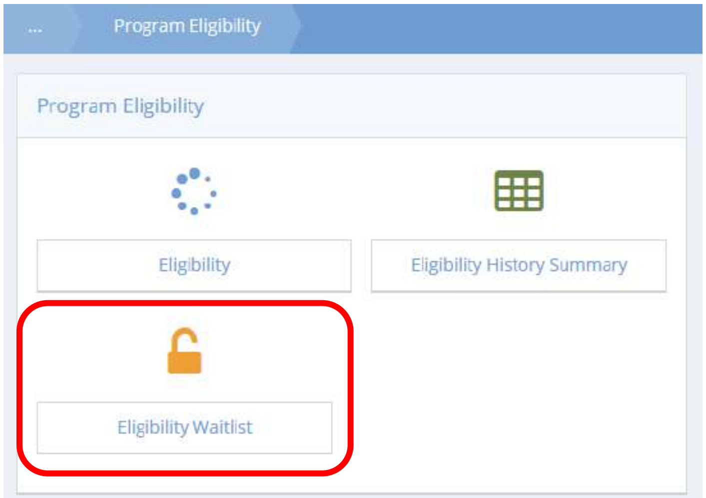


The Program Eligibility form displays.



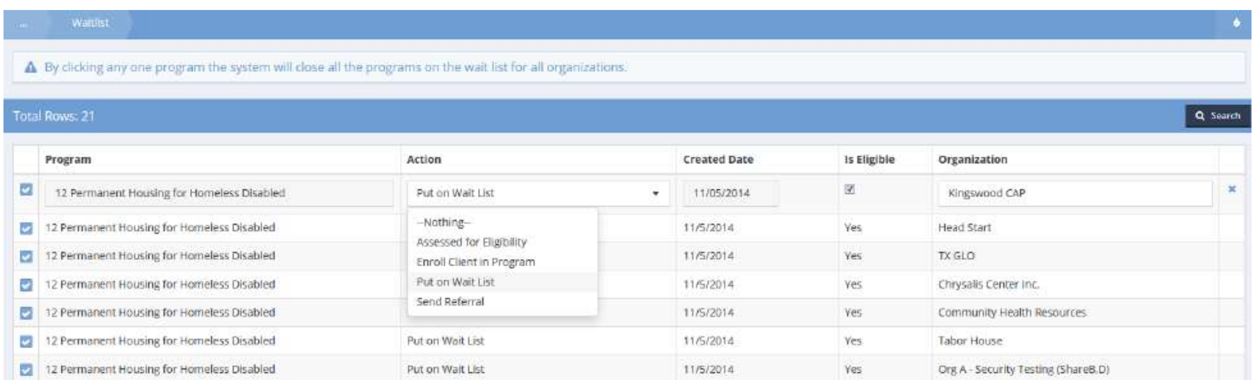
Click the clear checkbox for a program and select an action from the drop-down list. Click the Save button when finished.

Eligibility Waitlist

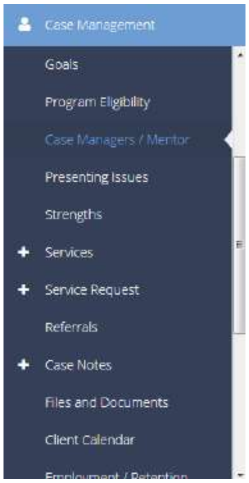


To edit an item on the wait list, click the blue checkbox  and select an action from the drop-down list. Click the 

button when finished.



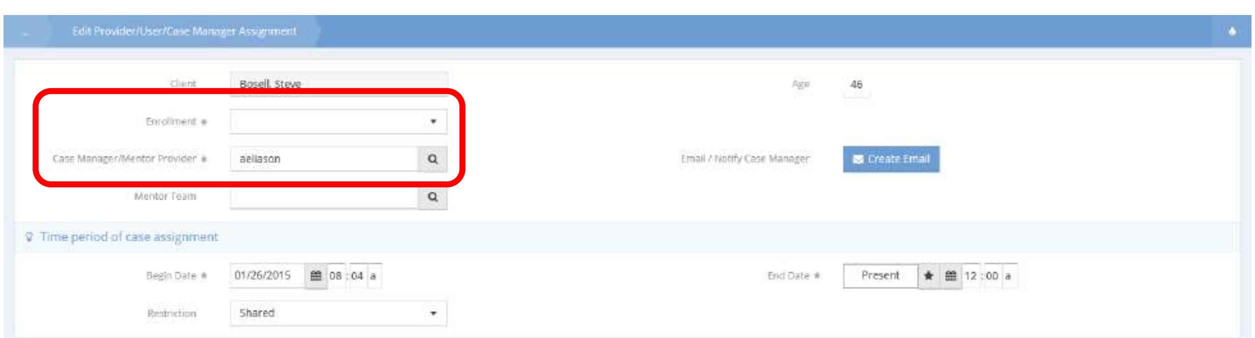
Case Managers and Mentors



The next menu item in the Case Management menu group in the "Case Managers/Mentor" summary form. This form allows the user to assign a case manager or mentor to a client associated with one of their enrollments.

Click the + Add New button in the top right corner to add a new case manager or mentor.

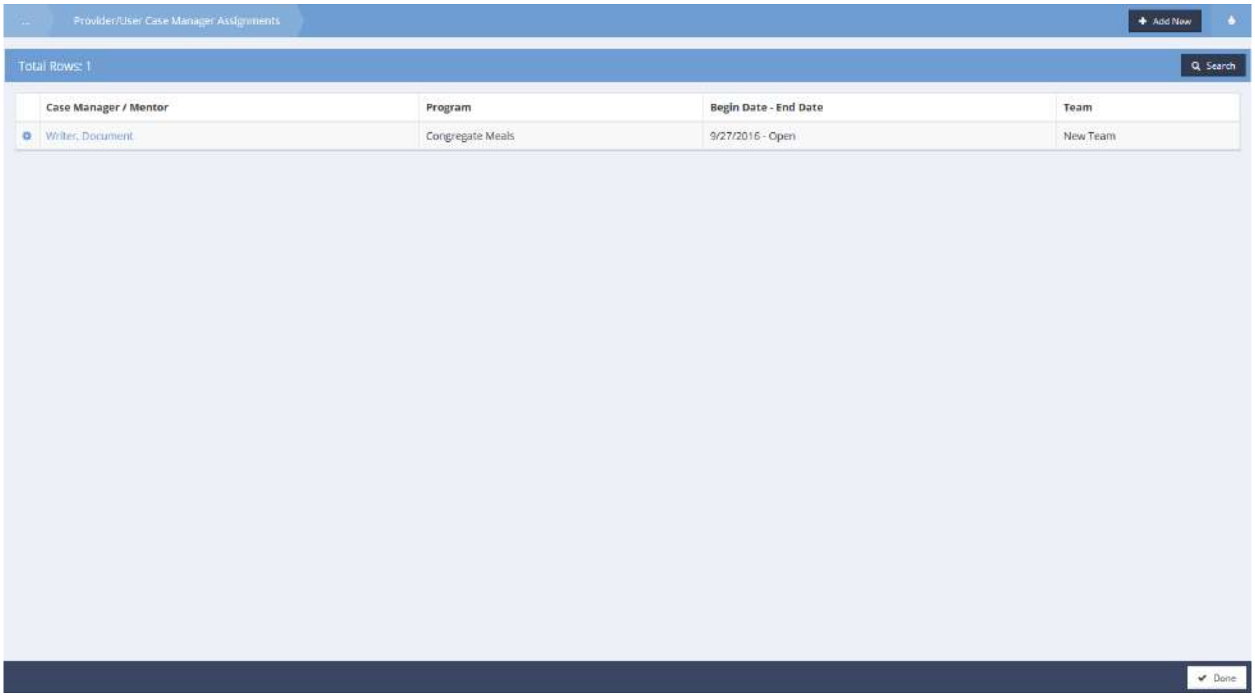
Enter the relevant/required information. If a team of individuals provides mentoring, use the look-up field to first designate the provider the team is associated with, then look-up and assign the mentoring team.



Objective: Edit case manager assignments.

Navigation: Case Management>Case Management>Case Managers and Mentors

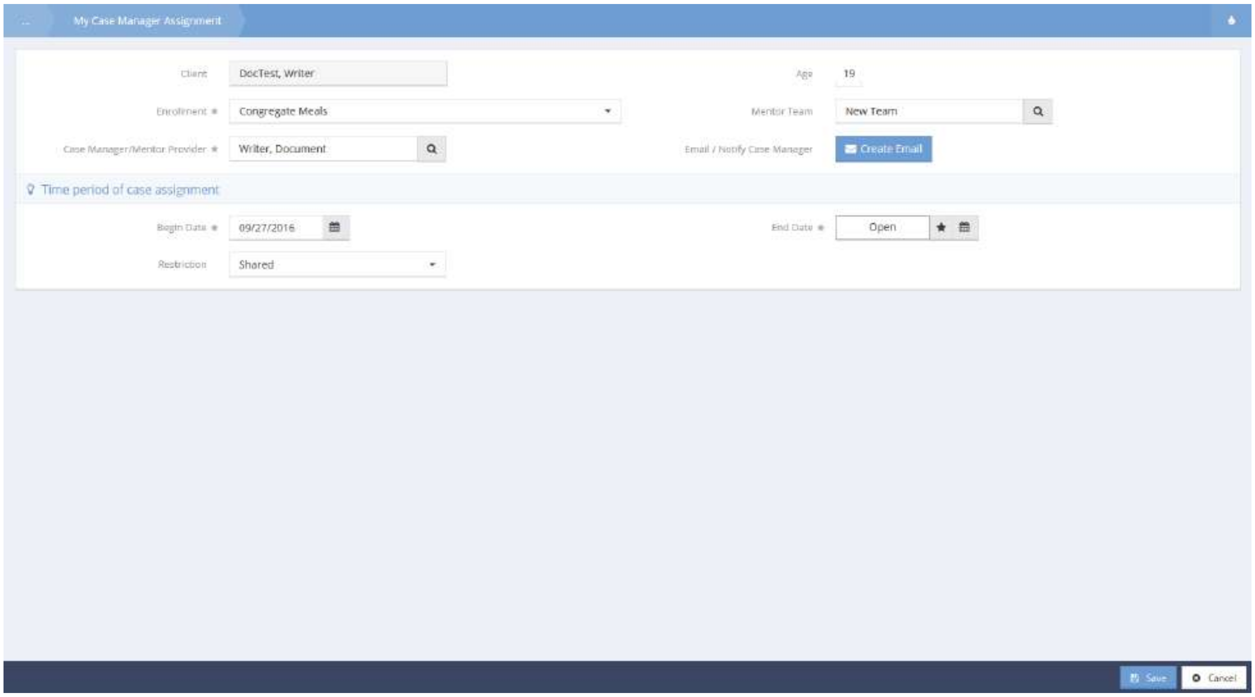
The Provider/User Case Manager Assignments form displays.

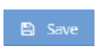


Existing case manager assignments display. Click the action gear icon associated with the desired assignment and select Edit from the menu options.

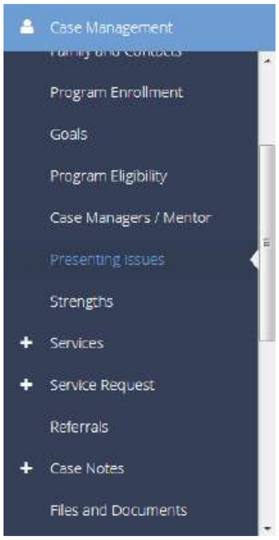
The My Case Manager Assignment form displays.

Case Manager Assignment (Edit) (9014)



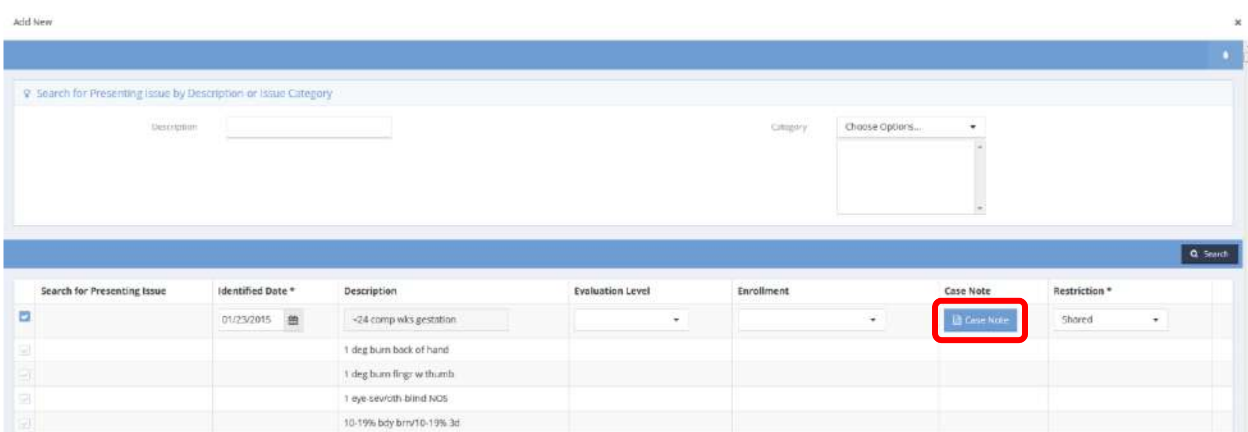
Edit details for the selected assignment; Enrollment, assigned Case Manager, and date range. Click the  button to save and exit.

Presenting Issues

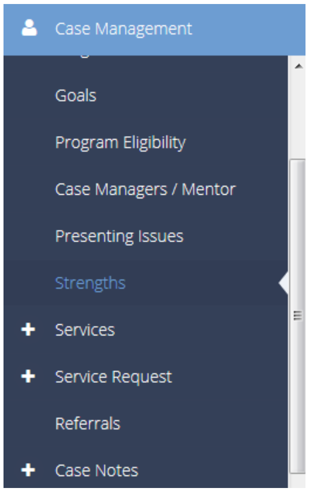


The next menu item in the Case Management menu group is the "Presenting Issues" summary form. This form allows the user to track a client's issues over several different categories. To add a new issue, click the **+ Add New** button in the top right corner of the summary form.

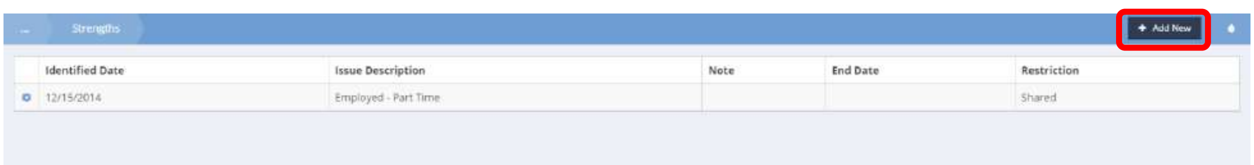
On the Add New form, click the clear checkbox next to the issue to select it. Enter all relevant/required information. Optionally, link the issue to the program the client is enrolled in to help address/overcome barriers created by the issue. To add a case note related to the issue, click the **Case Note** button. To prevent users in organizations other than the organization that created the record, set the restriction to "Not Shared".

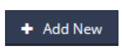


Strengths

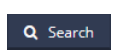


Objective: View and add items to a list of client strengths.



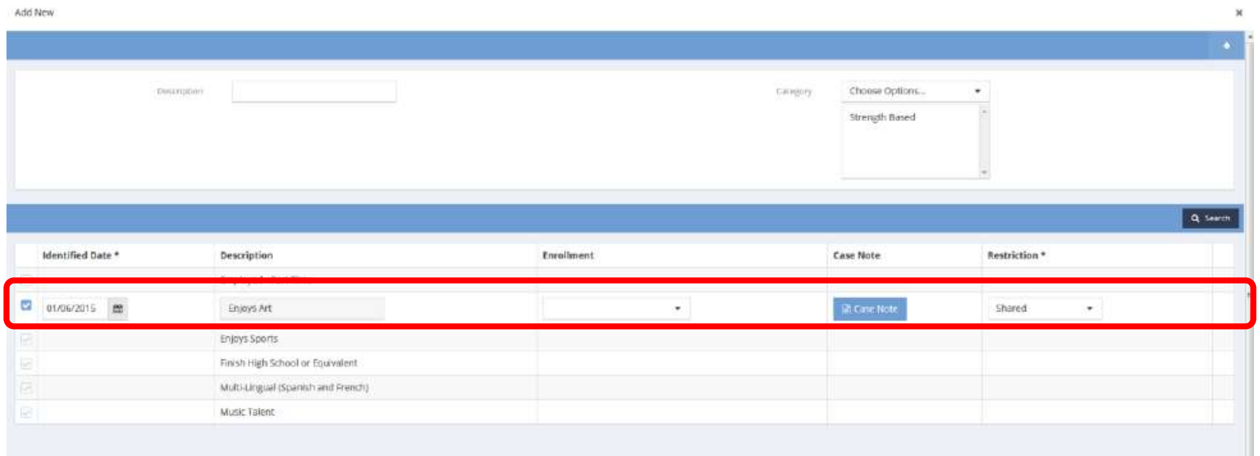
On the Strengths form, click the 

button. An Add New form opens in a new window to input strengths.

After selecting the desired parameters, click on the 

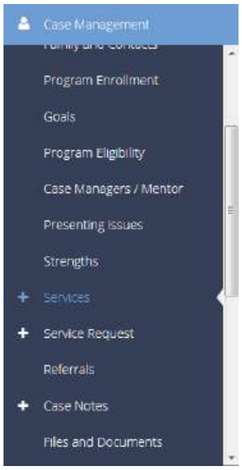
button.

Results displays in the space below.



To add a Strength, click the clear checkbox next to an item. Select enrollment and add a case note if desired. Click on the Save button.

Services

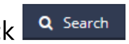


The next menu item in the Case Management menu group is the "Services" summary form. This form displays all the services and associated service data that a client has received.

Note: ***Clicking on the word "Services" launches the service summary form, clicking on the circular white plus sign launches an entry form to add a new service.***

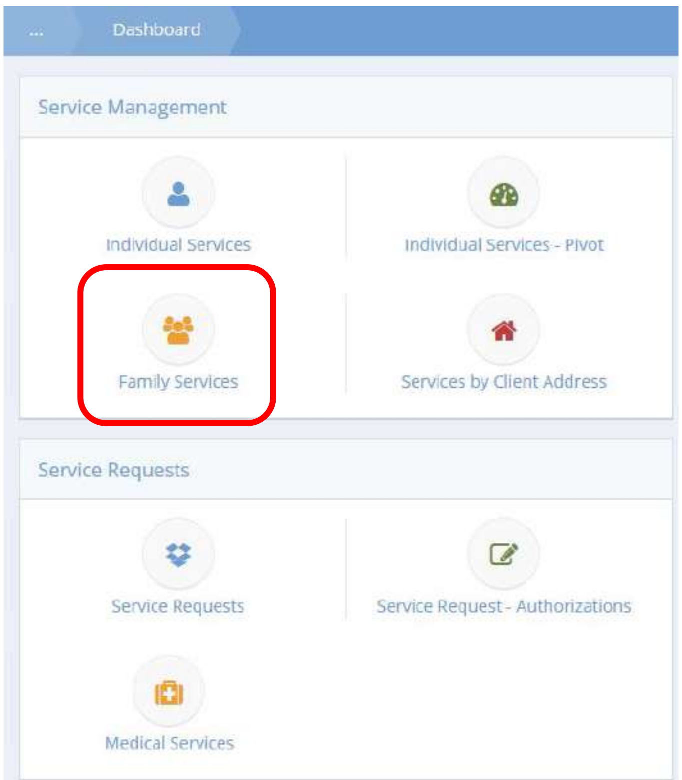
From the action gear icon, the user can edit an existing service, or view associated account transactions, if applicable.

To add a new service, click the **+ Add New** button in the top right corner.

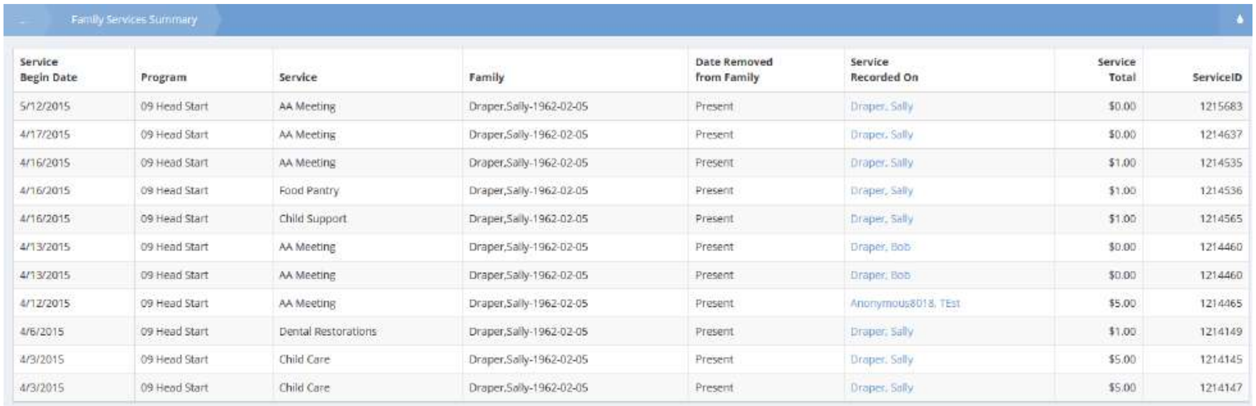
A list of all programs the client is enrolled in displays. Choose a program, then click  for a list of services provided by the selected program. Click the clear checkbox next to the service to select it. The date defaults to the current date and can be edited to back-date services that were received previously. Next, edit the units and unit value if needed. Finally, select an account that is associated with the chosen program to denote that the selected service should be paid for out of that account.

Family Services Summary

Objective: View services received by family.



Click the icon for Family Services. The Family Services Summary form displays a list of all posted family services.



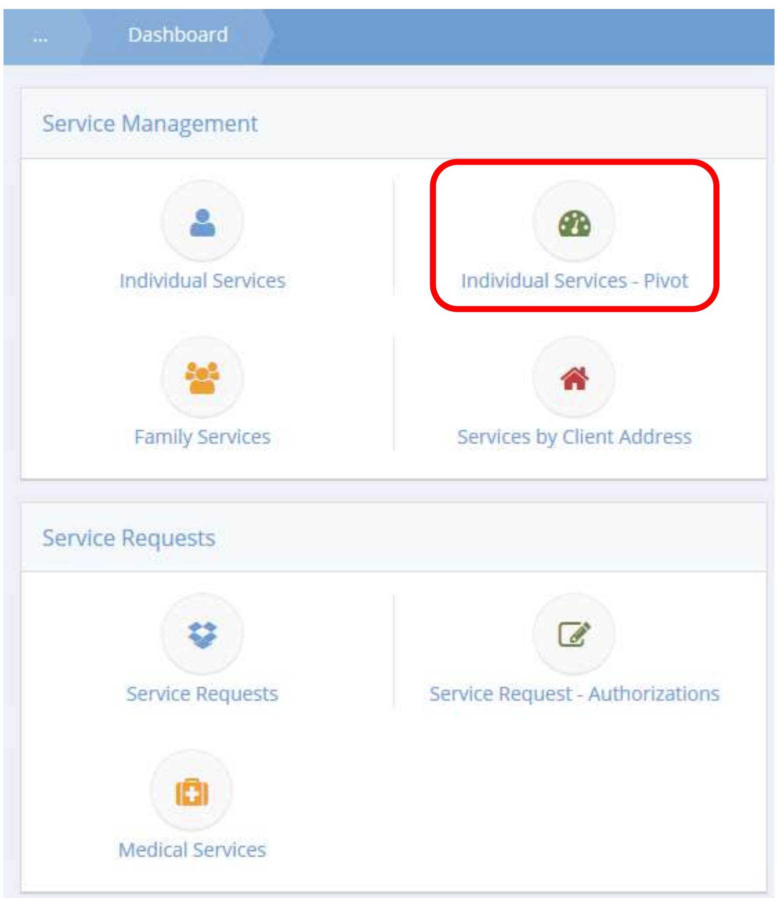
Family Services Summary

Service Begin Date	Program	Service	Family	Date Removed from Family	Service Recorded On	Service Total	ServiceID
5/12/2015	09 Head Start	AA Meeting	Draper,Sally-1962-02-05	Present	Draper, Sally	$0.00	1215683
4/17/2015	09 Head Start	AA Meeting	Draper,Sally-1962-02-05	Present	Draper, Sally	$0.00	1214637
4/16/2015	09 Head Start	AA Meeting	Draper,Sally-1962-02-05	Present	Draper, Sally	$1.00	1214535
4/16/2015	09 Head Start	Food Pantry	Draper,Sally-1962-02-05	Present	Draper, Sally	$1.00	1214536
4/16/2015	09 Head Start	Child Support	Draper,Sally-1962-02-05	Present	Draper, Sally	$1.00	1214565
4/13/2015	09 Head Start	AA Meeting	Draper,Sally-1962-02-05	Present	Draper, Bob	$0.00	1214460
4/13/2015	09 Head Start	AA Meeting	Draper,Sally-1962-02-05	Present	Draper, Bob	$0.00	1214460
4/12/2015	09 Head Start	AA Meeting	Draper,Sally-1962-02-05	Present	Anonymous8018, TEst	$5.00	1214465
4/6/2015	09 Head Start	Dental Restorations	Draper,Sally-1962-02-05	Present	Draper, Sally	$1.00	1214149
4/3/2015	09 Head Start	Child Care	Draper,Sally-1962-02-05	Present	Draper, Sally	$5.00	1214145
4/3/2015	09 Head Start	Child Care	Draper,Sally-1962-02-05	Present	Draper, Sally	$5.00	1214147

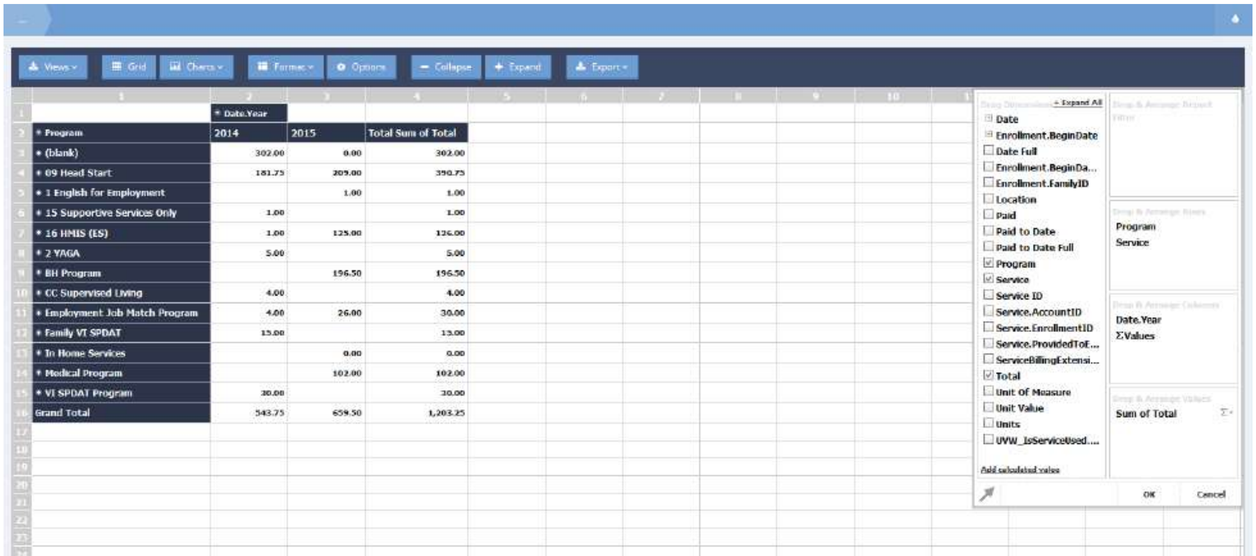
Services Summary Pivot

Objective: Open a pivot table for individual services in CaseWorthy Analytics.

Navigation: Case Management>Case Management>Services



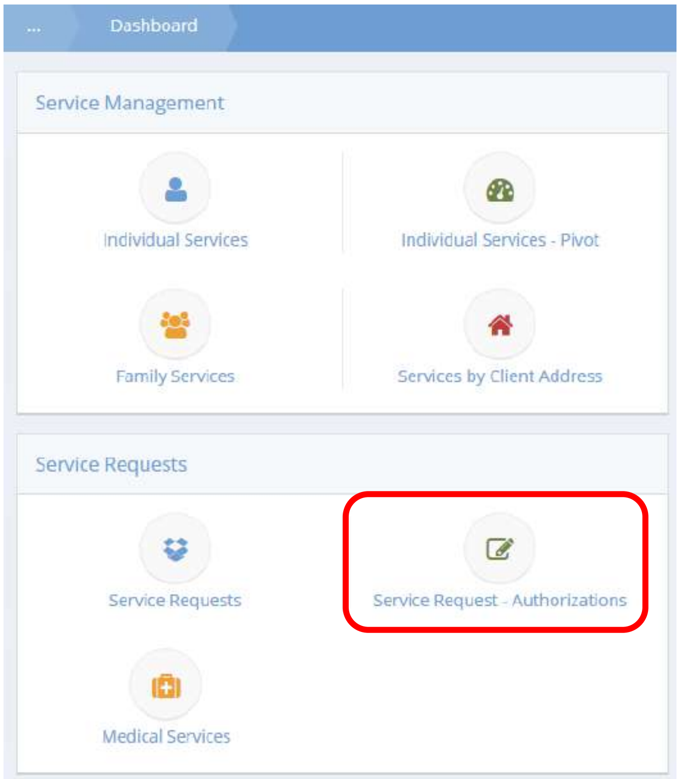
Click the icon for Individual Services – Pivot. The Services pivot table displays.



Note: ***More information on CaseWorthy Analytics may be found in the System Admin manual.***

Add Service Request Authorization

Objective: Add a service request authorization.

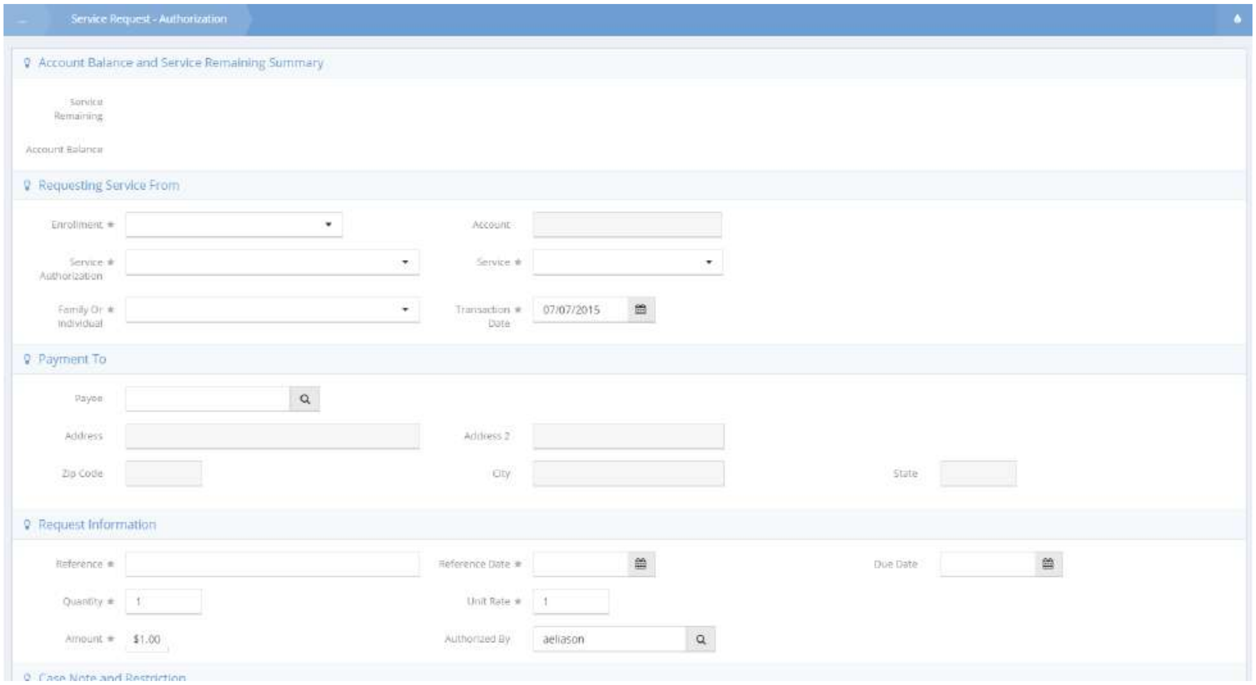


Click the icon for Service Request – Authorization. The Service Request Summary displays.

Date	To Provider	Service	Status	Amount	Payment
6/30/2015	CaseWorthy	Bus Tokens	Pending Approval - 0	$1.00	
6/26/2015	CaseWorthy	AA Meeting	Referred - 0	$1.00	
3/26/2015	CaseWorthy (Real)	Bus Tokens	Referred - 0	$40.00	

Click the ✚ Authorized Service button.

The Service Request – Authorization form displays.



Select an enrollment, service authorization, service and family or individual from the drop-down lists. Enter a reference, the date of reference and any other relevant fields. Click 

when finished.

Outcomes Summary

Objective: View and edit outcome details.

Navigation: Case Management>Case Management>Outcomes Summary

The Outcomes Summary – All form displays.


... Outcomes Summary - All

Total Rows: 37

Outcome Date	Outcome	Score Short Description	Scoring Value	Outcome Type
12/4/2012	Employment	Employed full-time; inadequate pay;no benefits	1.00	Assessment
9/13/2012	Employment	No Job	1.00	Assessment
9/13/2012	Food	Household is on food stamps	2.00	Assessment
9/13/2012	How do you like the Area?	Best	3.00	Assessment
9/13/2012	Food	Can choose to purchase any food household desires	5.00	Assessment
2/13/2013	Employment Retention	1 Year Retention	5.00	Assessment
2/13/2013	Childcare	Childcare is unreliable or unaffordable; inadequat	2.00	Assessment
2/13/2013	Children's Education	One or more eligible children not enrolled in scho	1.00	Assessment
4/26/2013	Housing	In stable housing that is safe but only marginally	1.00	Assessment
4/26/2013	Food	Household is on food stamps	2.00	Assessment
4/26/2013	Housing	Homeless or threatened with eviction	1.00	Assessment
4/26/2013	Food	No food or means to prepare it.	1.00	Assessment
4/26/2013	Housing	Homeless or threatened with eviction	1.00	Assessment
4/26/2013	Food	No food or means to prepare it.	1.00	Assessment
2/20/2012	Adult Education	Has high school diploma/GED	1.00	Goal
5/13/2013	Income	Income is sufficient + discretionary income	1.00	Goal

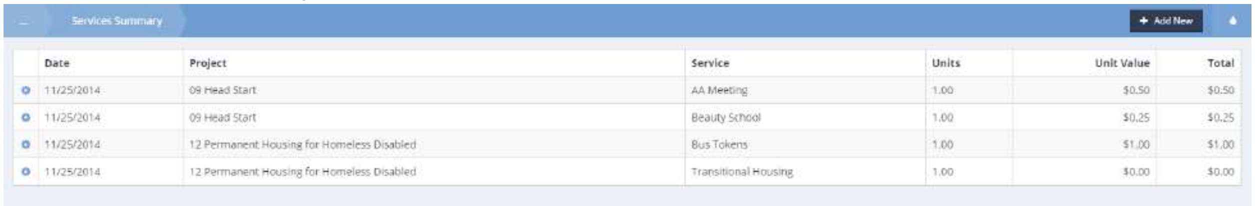
Done

View outcome details. Click the action gear icon associated with the desired outcome to edit by selecting Edit from the menu. Click the Done button when finished.

HMIS Services

Navigation: Case Management>Case Management>Services

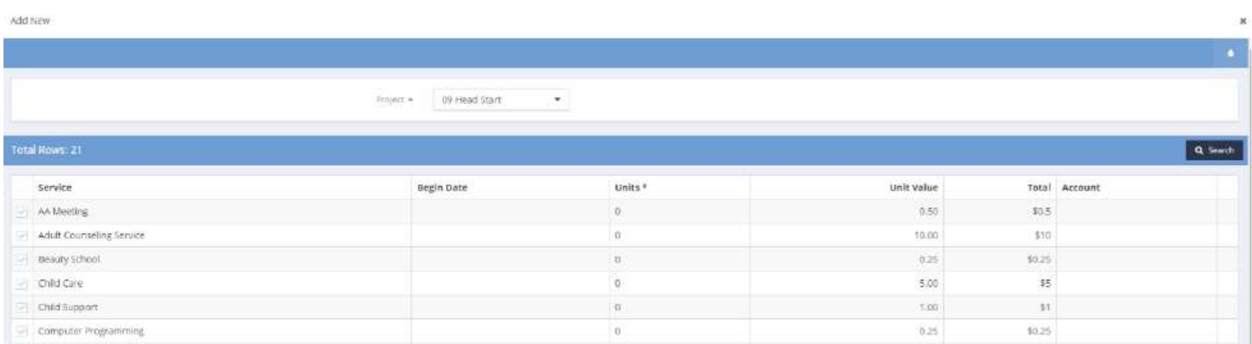
HMIS Services Summary



To add a new service, click on the **Add New** button. The Add New form displays.

HMIS Service Spreadsheet

Click on the down arrow ▼ icon for Project and select the desired project from the drop-down list that appears. Click on the **Search** button. A list of qualifying services appears.

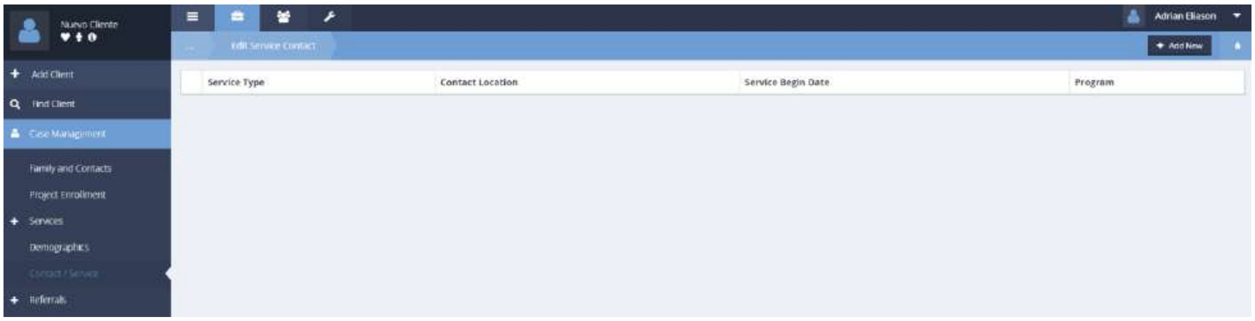


Select the desired service by clicking on the checkbox associated with it. The row expands.

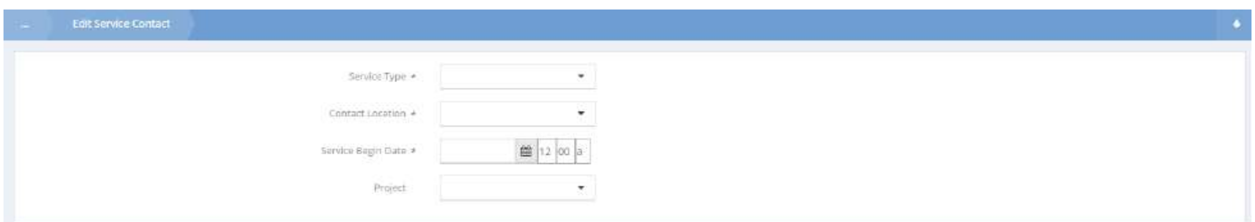
Make any desired changes to the data presented and click on the **Save** button.

HMIS Service Contact

Navigation: Case Management>Case Management>Contact/Service

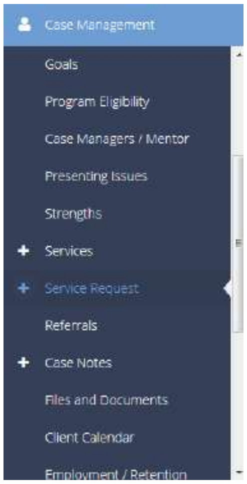


The Service Contact Summary form displays. Click on the Add New button. The Edit Service Contact form displays.



Click on the down arrow icon for Service Type and Contact Location and select values from the associated drop-down lists that appear. Enter the Service Begin Date. If desired, click on the down arrow icon for Program and select a value from the drop-down list that appears. Click on the Save button.

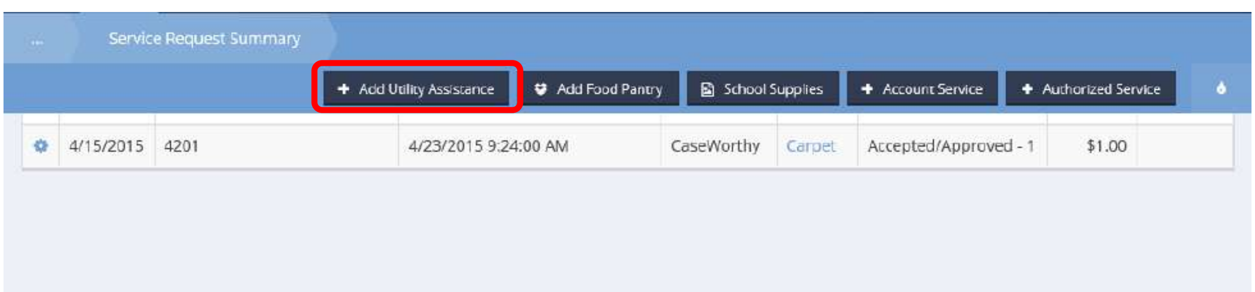
Service Request



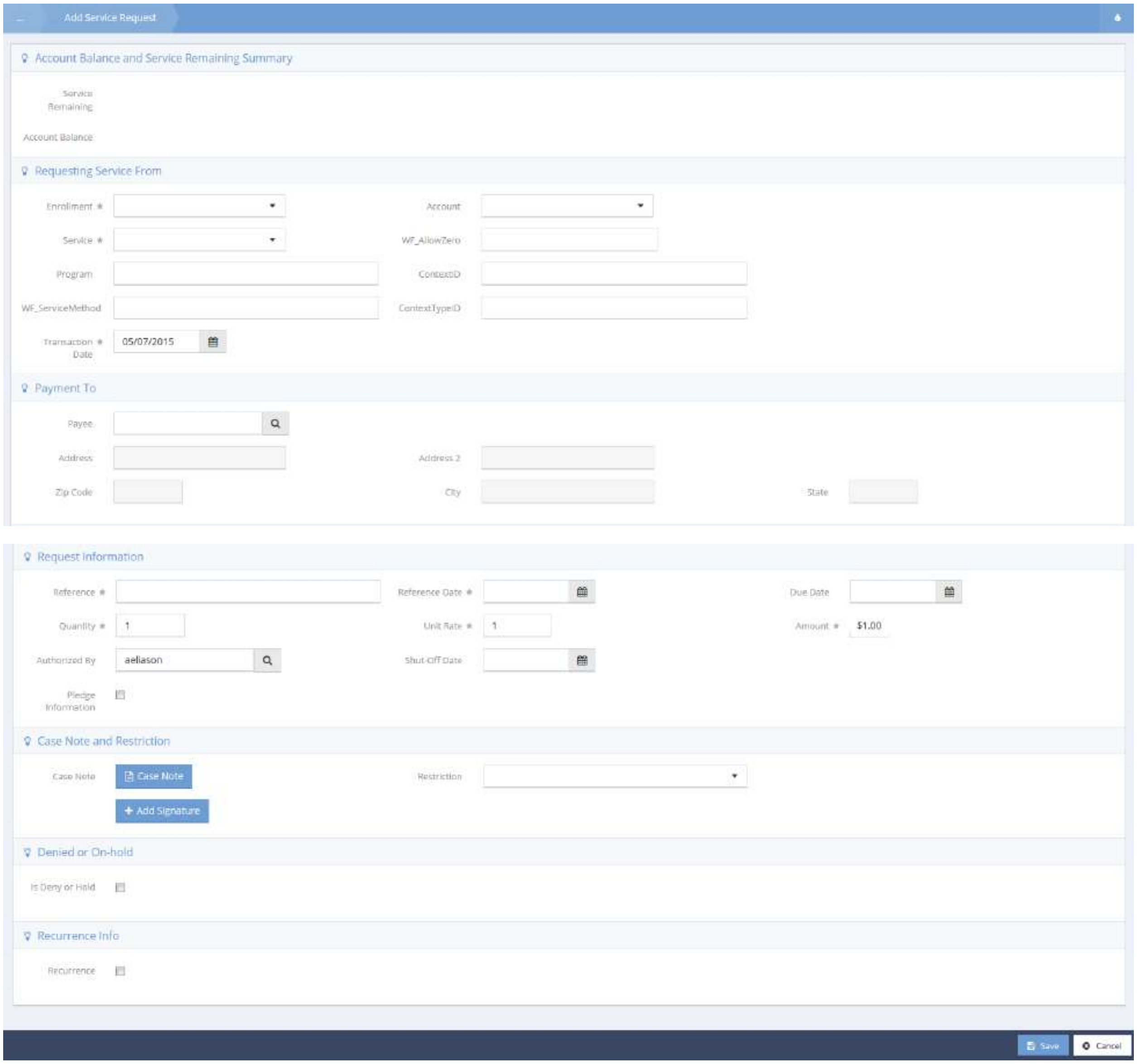
The next menu item in the Case Management menu group is the "Service Request" summary form. This form is used when providing a service to a client which may require one or more approvals.

Utility Assistance Request

To enter a request that requires an approval for a specific amount of money or service cost, click the Add Utility Assistance button on the top right of the Service Request Summary form.



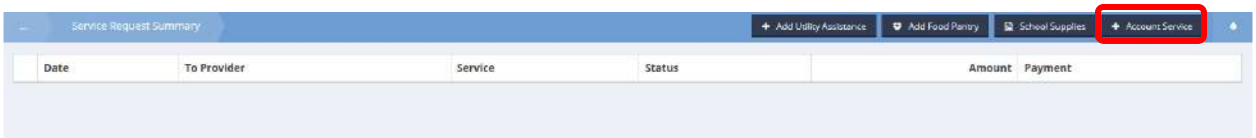
The Add Service Request form displays.



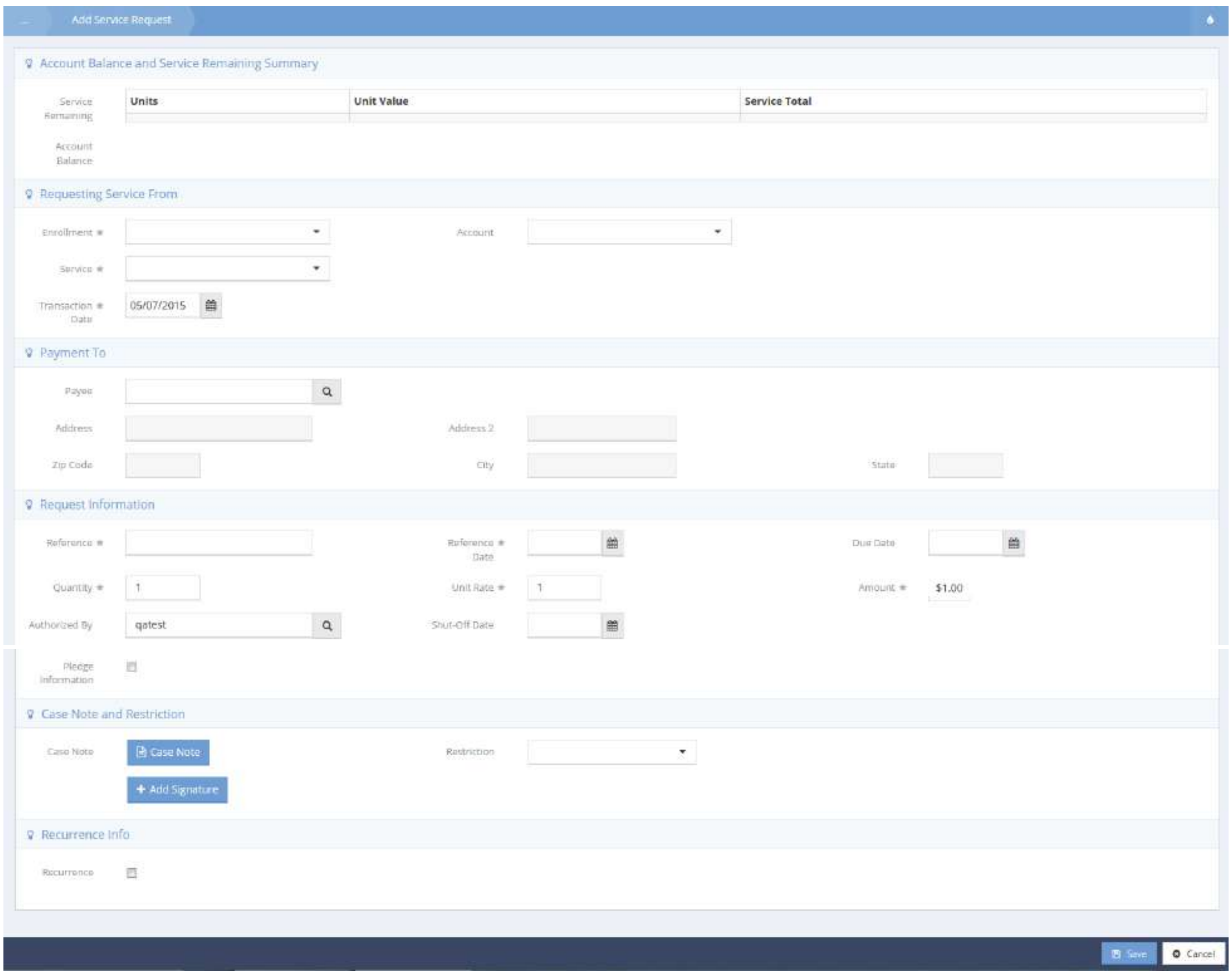
The Account Balance renders after Service Eligibility rules have been set up. Only enrollments with an account linked display. Similarly, if there are rules set up and the client has previously received the requested service, the Service Remaining amount populates. Be sure the service amount and rate are set correctly to calculate the total amount requested. Enter all other relevant/required data and click Save to submit the request. The request status displays on the summary form and if it has been approved, the service posts to the client's Services Summary.

From the action gear on the summary form the available actions are to edit the request, view the history of the request, view any hold associated with the request, print a request, or deny a request.

Service Request New (Add)



From the Service Request Summary form, click on the **+ Account Service** button. The Add Service Request form displays.



Click on the down arrow icon for Enrollment and select the desired value from the drop-down list that appears.

A tabular representation of the account balance appears on the form.

Account Balance

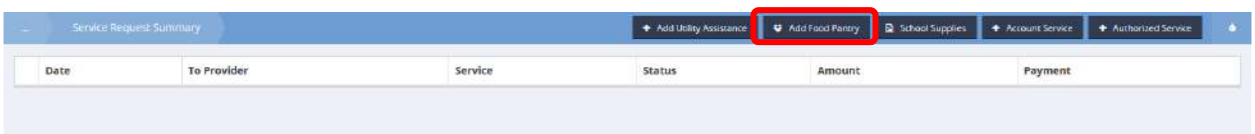
Account Description	Available Balance	Committed Amount
2011 Demo	$-0.28	$1,735.28

Click on the down arrow icon for Service and select the desired value from the drop-down list that appears. A tabular representation of the service remaining appears on the form.

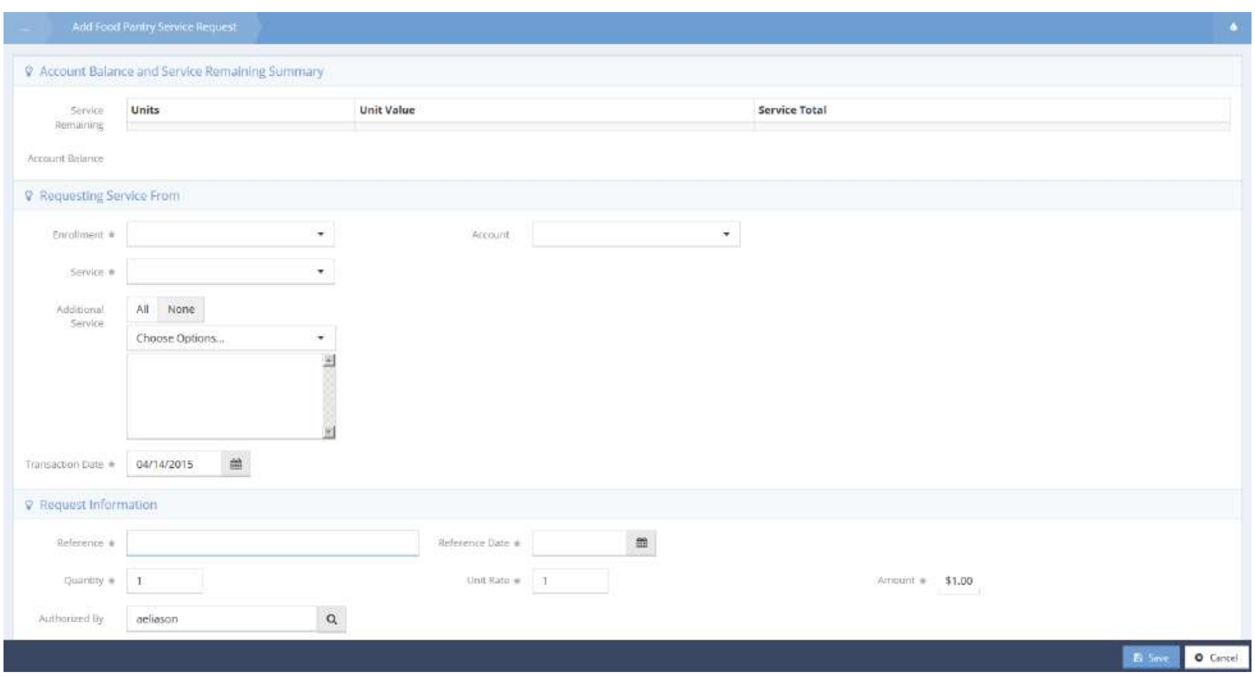
Enter appropriate data into the other required fields, Reference, Reference Date, Quantity, Unit Rate and Amount. Enter any desired non-required information and click on the Save button.

Add New Food Pantry Service Request

Objective: Add a request for food or utility assistance.



Select the Add Food Pantry button. The Service Request Food Pantry (Add New) form displays.



Select values for enrollment, account, service and additional service from the drop-down lists for each. Enter the transaction date, reference, reference date and shut-off date. Enter the quantity and unit rate. If desired, change the authorized by name by clicking on the magnifying glass icon and performing the lookup. To enter pledge information, check the check box. The form expands to reveal the pledge information section.

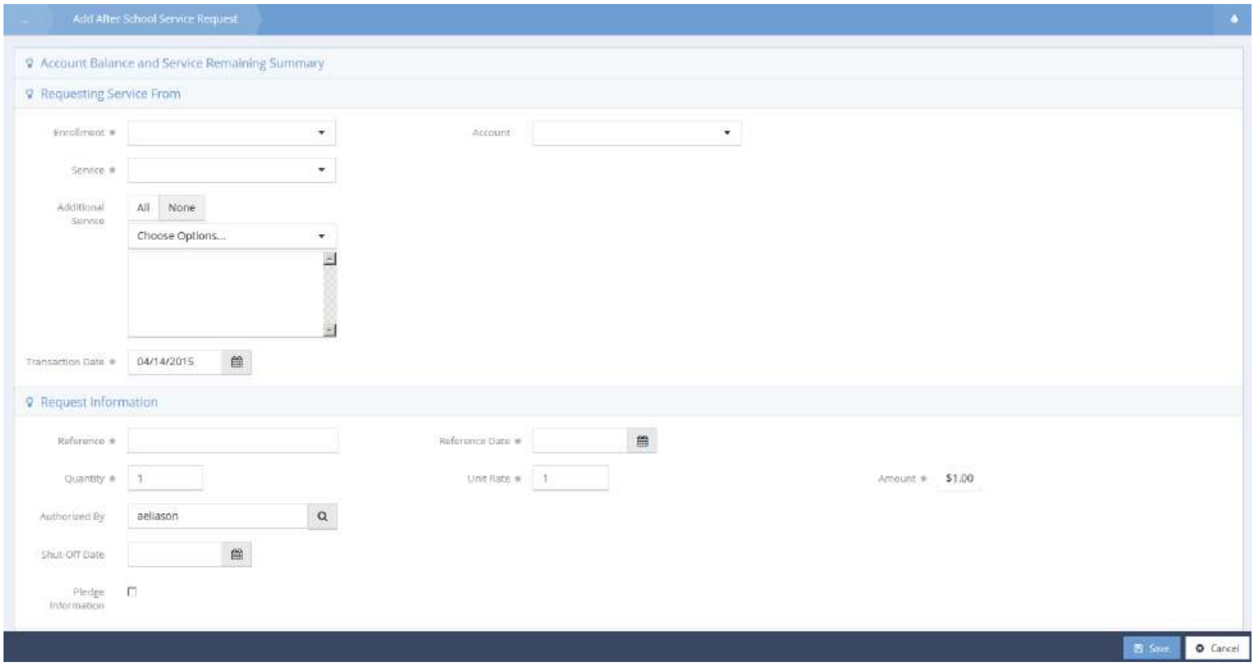
Enter the date and amount. Enter any case notes and signatures and select a restriction value from the drop-down list. Click on the Save button.

Add After School Service Request

Objective: Add a request for school supplies or after school assistance.

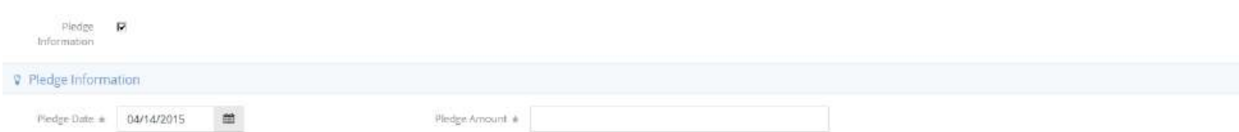
From the Request for Service from, click on the School Supplies button.

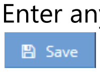
The Add After School Service Request form displays.

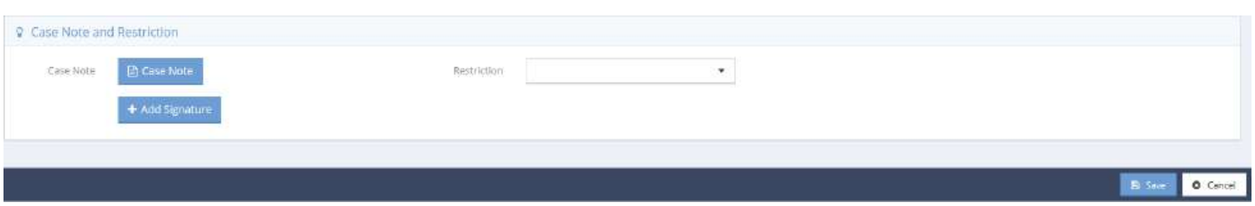


Select values for enrollment, account, service and additional service from the drop-down lists for each. Enter the transaction date, reference, reference date and shut-off date. Enter the quantity and unit rate. If desired, change the authorized by name by clicking on the magnifying glass  icon and performing the lookup.

To enter pledge information, check the check box. The form expands to reveal the pledge information section.

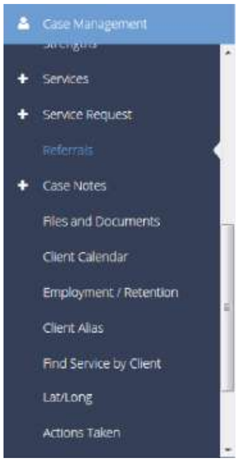


Enter the date and amount. Enter any case notes and signatures and select a restriction value from the drop-down list. Click on the  button.



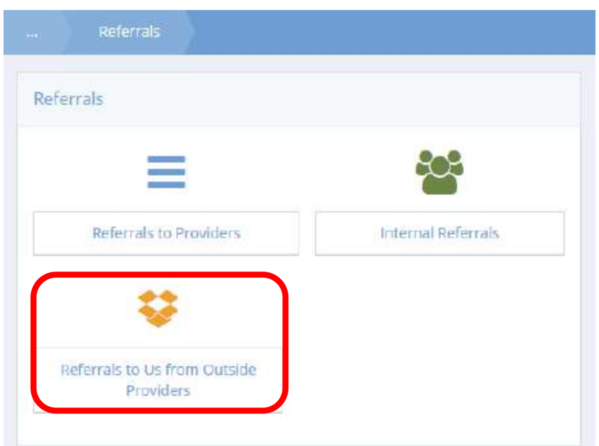
Referrals

Referral In



The next menu item in the Case Management menu group is the "Referral In" summary form. This form allows the user to track what agencies or organizations referred a client to them, and for what service they were referred.

Select the Referrals to Us from Outside Providers icon on the Referrals menu.



The Referral In Summary form displays. To add a new referral in, click the Add New button in the top right corner. Use the Multi Referral In button if the client was referred for more than one specific service.

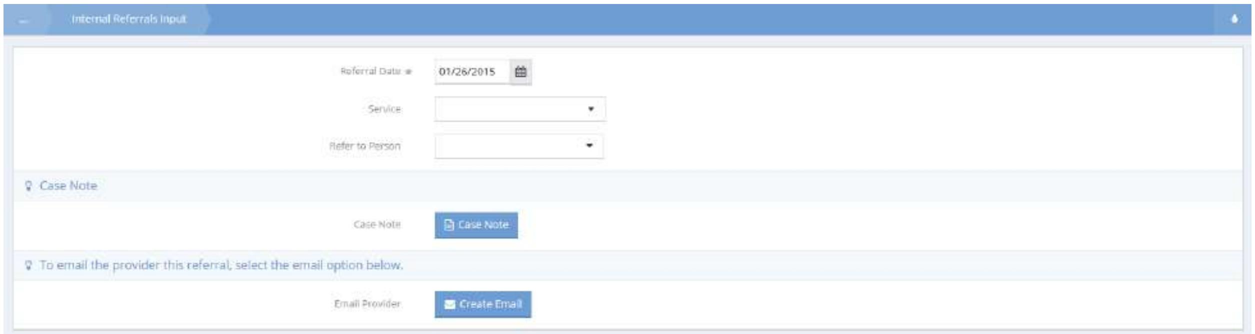
To record a referral in, select the service for which the client was referred, and the organization that made the referral.

Internal Referrals

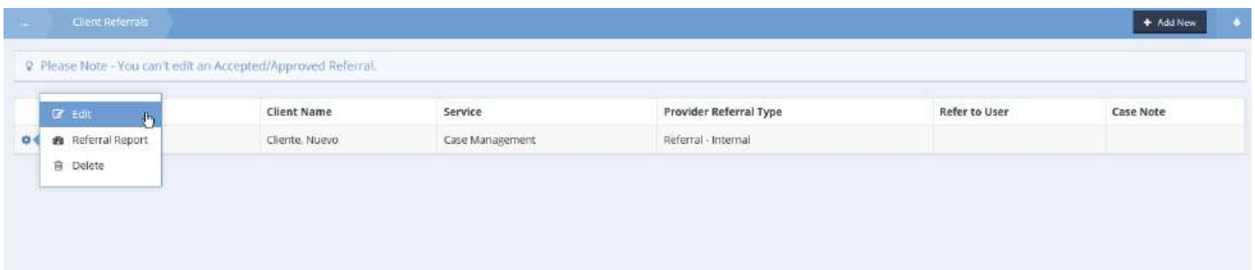
The Internal Referrals summary form allows users to track the organizations they have referred clients to, and for what services they were referred.

To add a new referral, click the **+ Add New** button in the top right corner.

Select a service, select a refer to person, and add a case note if desired.

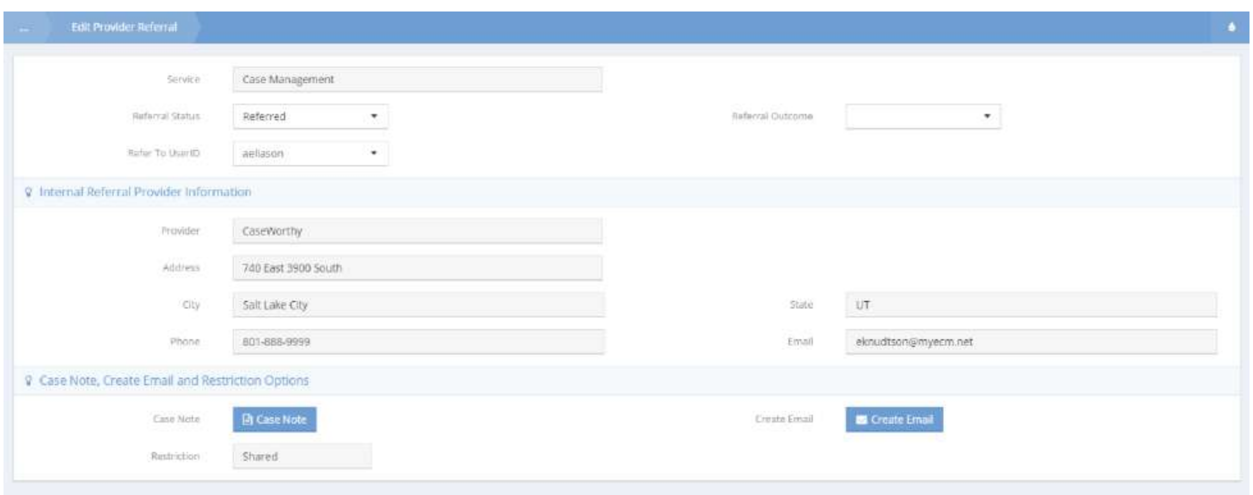


To edit an existing referral, click the action gear and select Edit from the pop up menu that appears.



To edit a referral, click the associated action gear and select Edit from the pop up menu that appears.

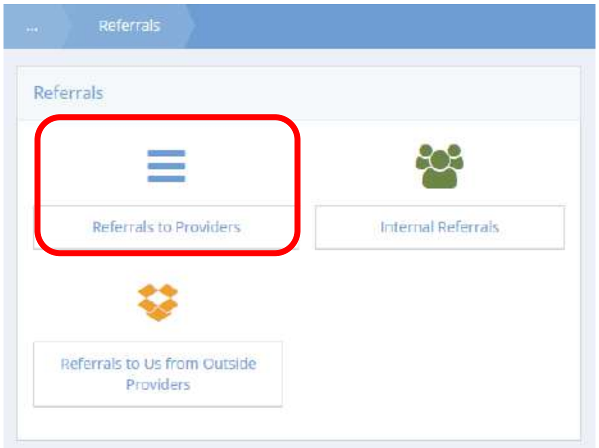
The Edit Provider Referral form displays.



Make any changes and click on the 

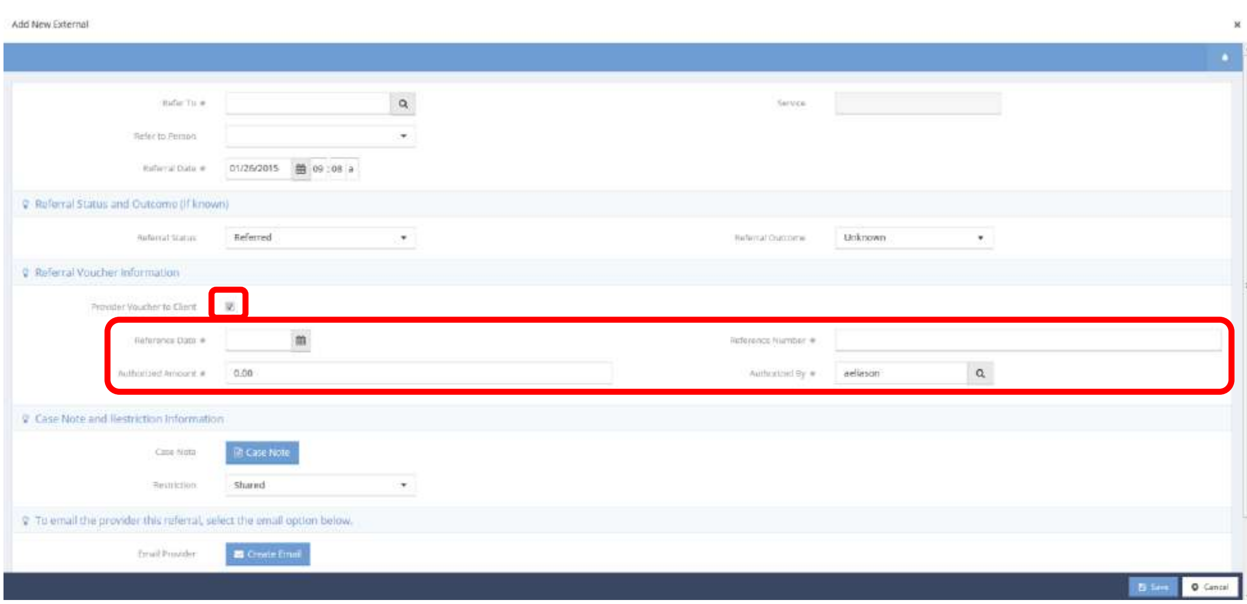
button.

Referrals to Providers

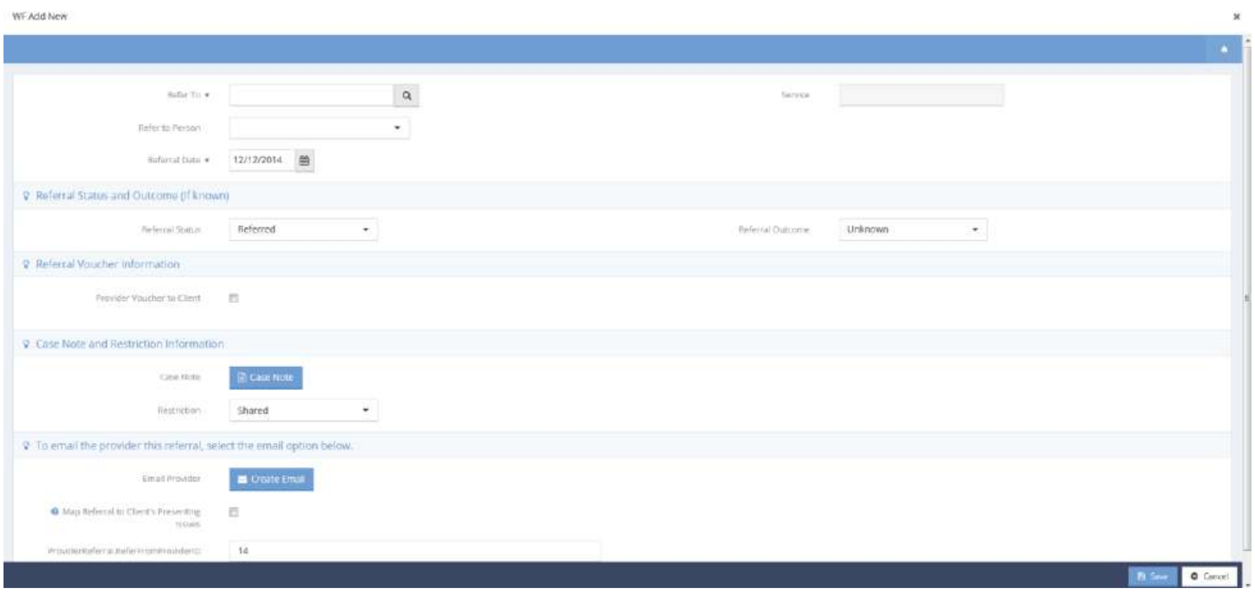


To add a new external referral, click the + Add New External button or + WF Add New button in the top right corner. To edit a voucher for the client to take with them to the referral source, click the button. To print the voucher, click the action gear and select "Referral Report".

The Add New External form displays.

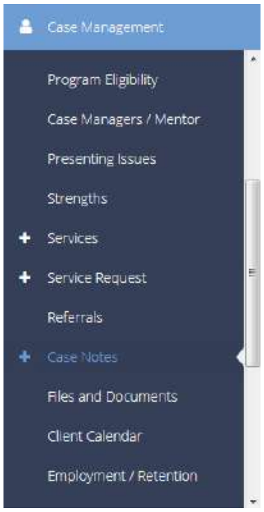


Use the look-up field to select the service the client has been referred for and the provider the client is being referred to. To create a voucher to print for the client, check the "Provider Voucher to Client" check box and enter relevant/required information. Additional fields appear. If desired, enter a case note, send an email to the referral provider and/or link the referral to one or more of the client's presenting issues. Adding a referral using the **+ WF Add New** button opens a similar form that is filled out in the same way as the Add New External form.



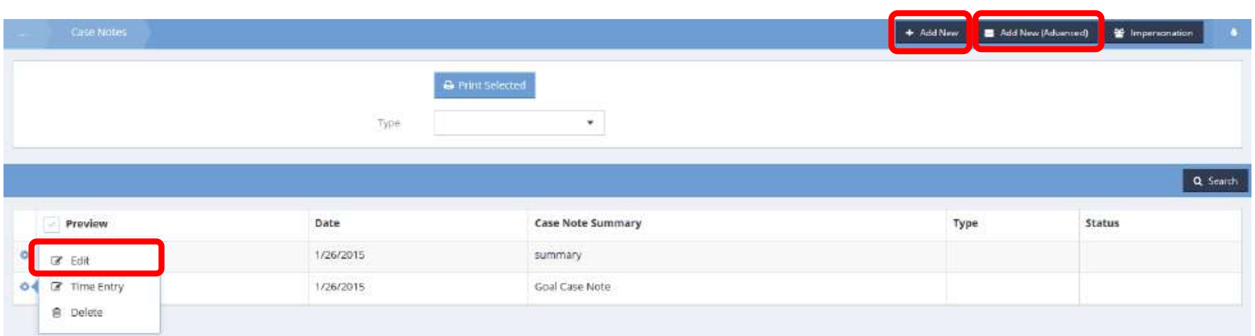
Fill out all required fields and click on **Save** button.

Case Notes



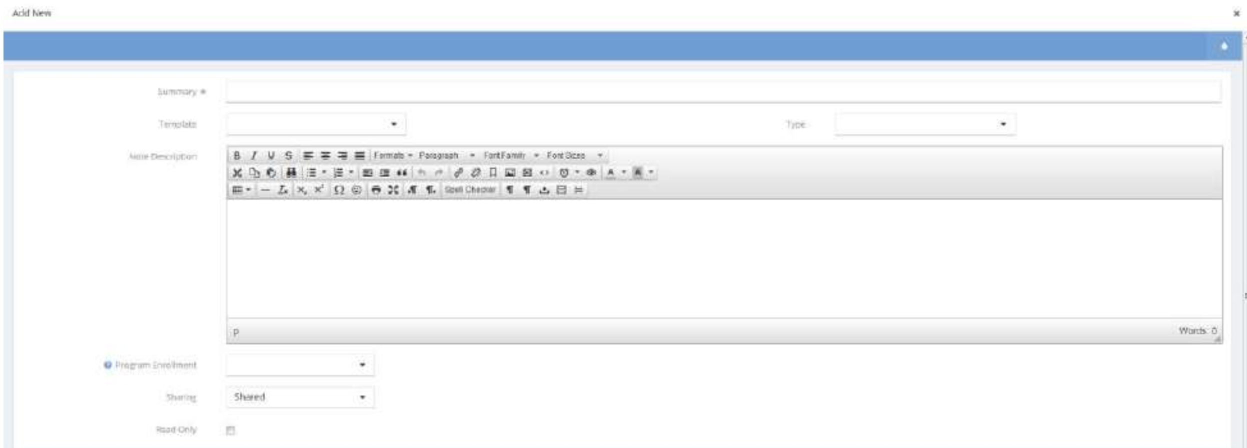
The next menu item in the Case Management menu group is the "Case Notes" summary page. Here the user can view all case notes associated with a client.

Note: ***Clicking on the words "Case Notes" launches the summary form, clicking on the circular white plus sign launches an entry form to add a new case note.***



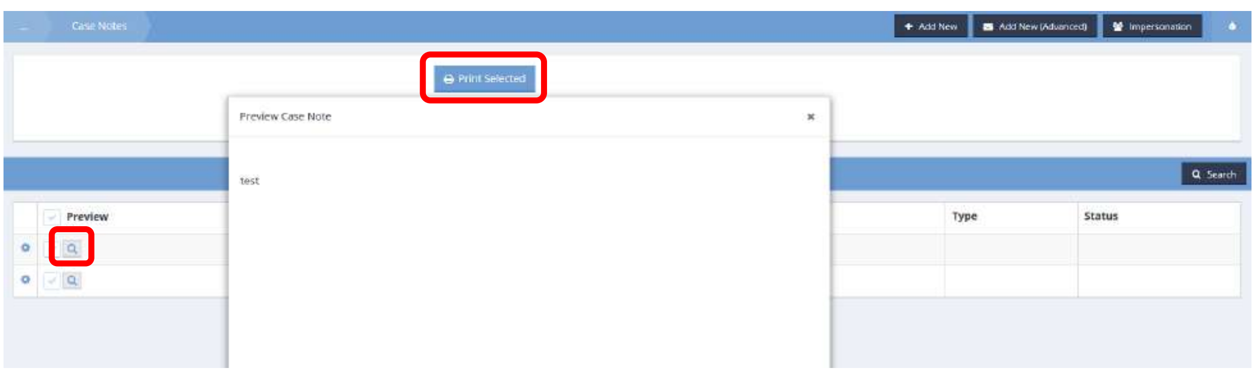
From the action gear, the user can edit an existing case note. To enter a new case note, click the Add New button or Add New (Advanced) button. The Add New (Advanced) button allows a user to enter an electronic signature to the case note as well as track time case mangers spend with clients.

To enter a new case note, type a short description into the summary box. A case note type or template can be selected. Type the desired information into the text box.

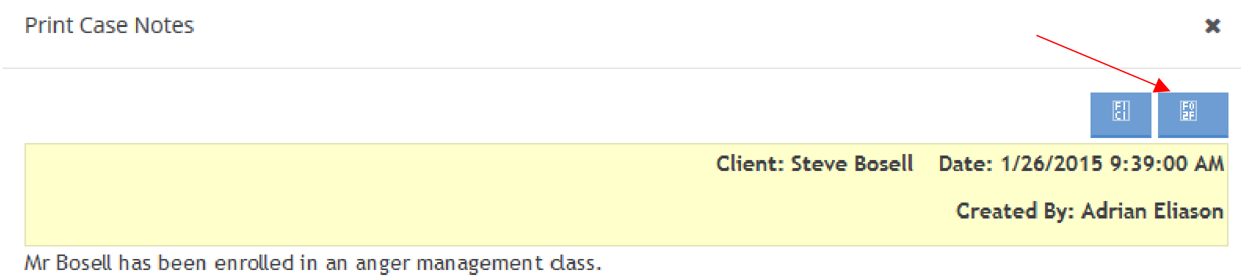


The Impersonation button allows authorized users to view and edit secure case notes. Case notes can be shared or set to “my eyes only” to create secure entries that are only accessible to the case manager who created the note, as well as any authorized “impersonator” users.

Users can preview a case note by clicking on the magnifying glass to the right of the action gear icon.



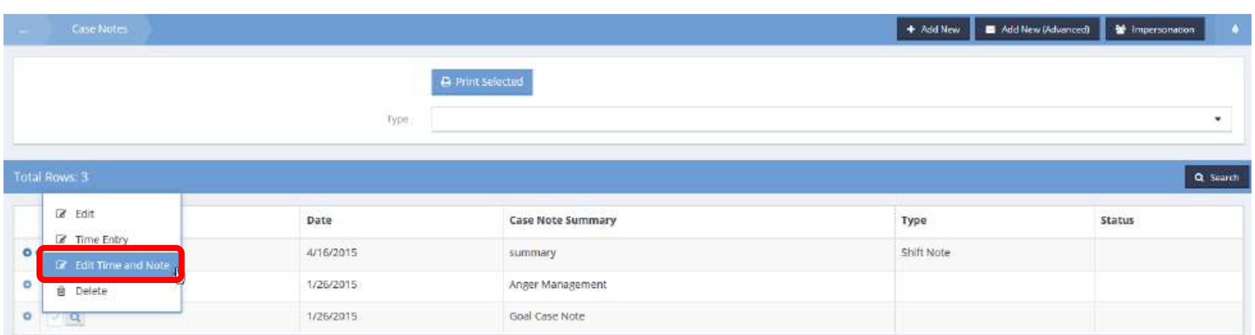
Additionally, users can select the check box next to the action gear then click on the Print Selected button to print case notes. A print preview pop-up appears. Click on the printer icon to print.



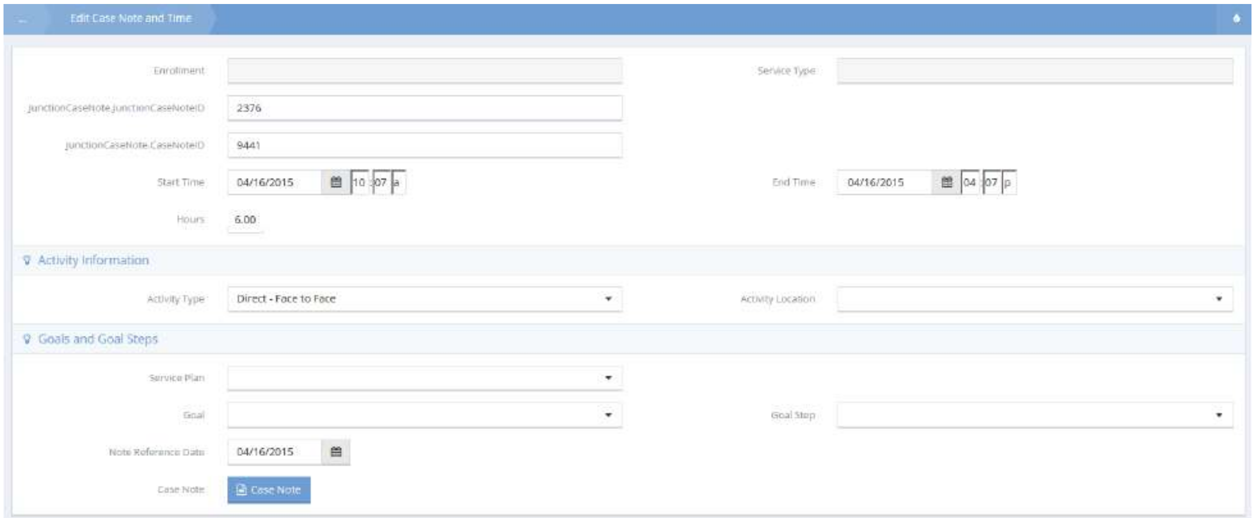
Edit Case Note and Time

Objective: Make changes to case note and service time information.

Click on the action gear icon associated with the desired case note. Select Edit Time and Note from the pop up menu that appears.



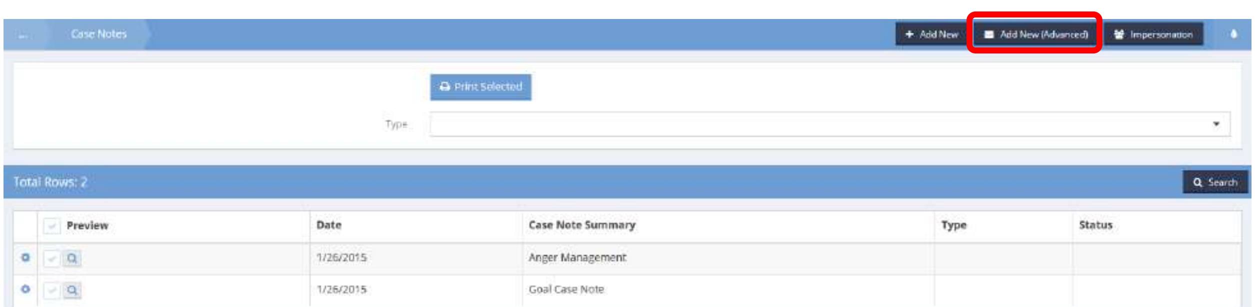
The Case Note & Time (Edit) form displays.



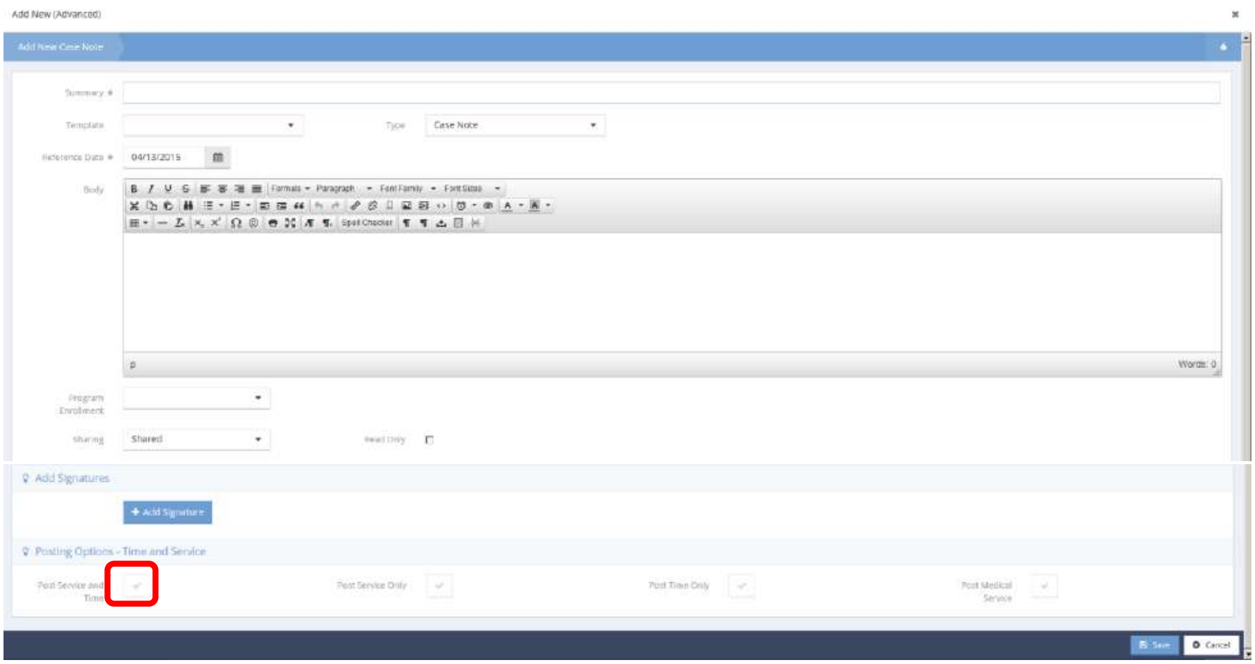
Make any desired changes to the time or case note information.

Service and Time Entry

Objective: Add service provided through the case notes area of CaseWorthy™.

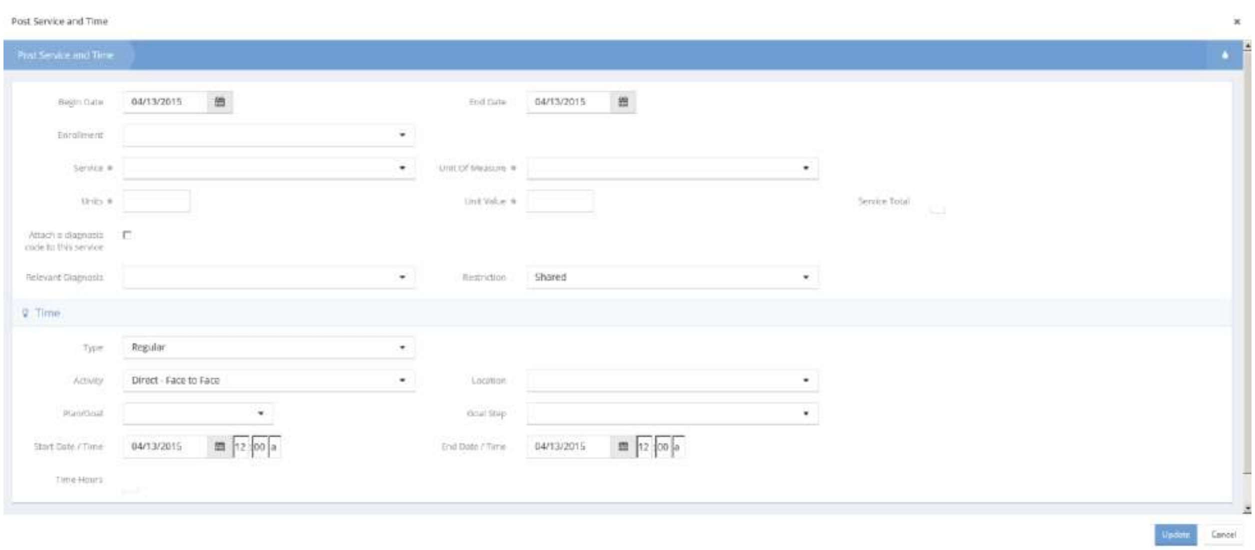


The Case Notes form displays. Click on the Add New (Advanced) button. The Add New (Advanced) form displays.



Enter the summary and select the template and type from the drop-down lists. Enter the notes into the body and select the sharing from the drop-down list. Indicate if the note is read only and add a signature. Click the Post Service/Time Entry check box.

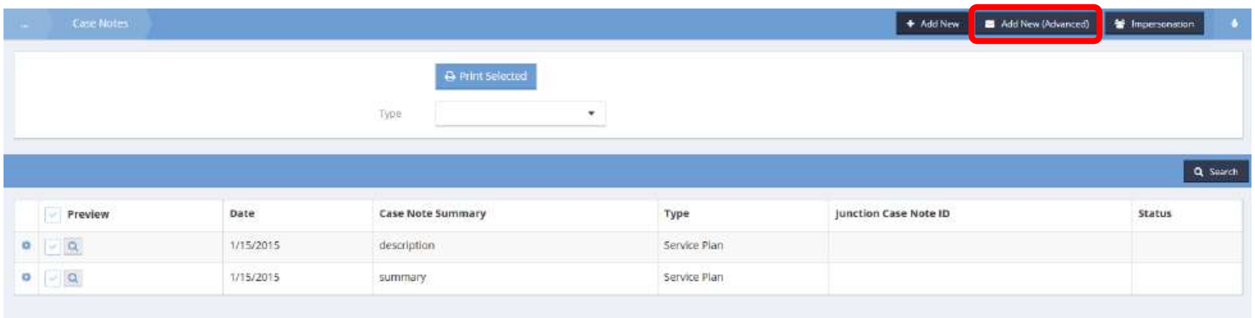
The Post Service and Time form displays.



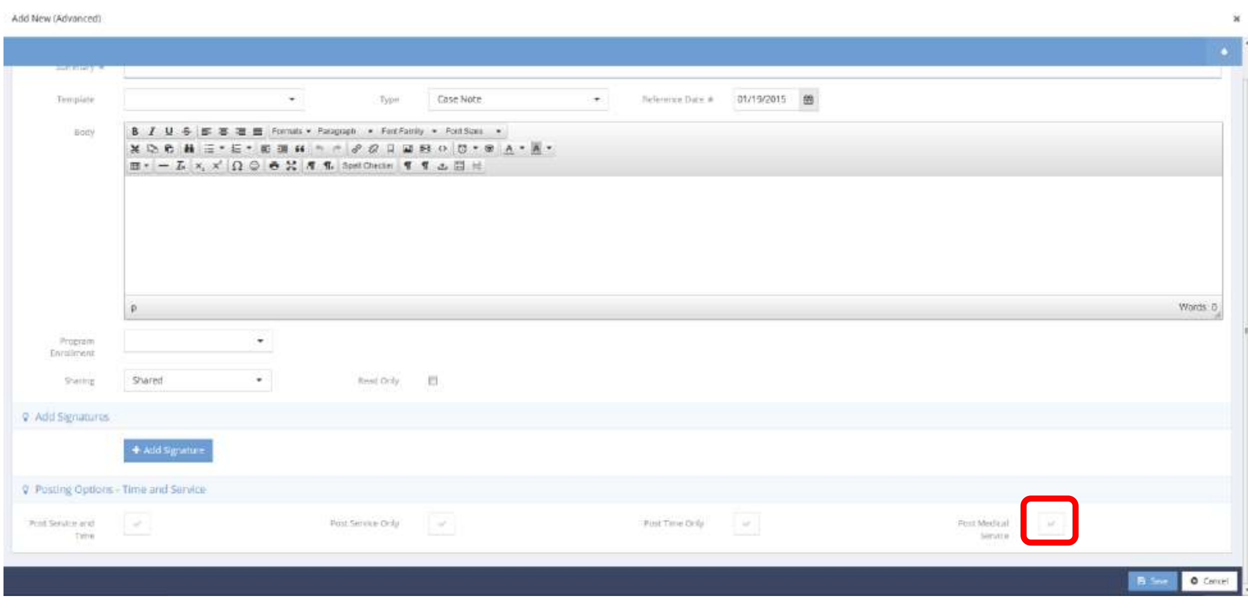
Enter the date range, number of units, unit value and times and select values for the other fields from the drop-down lists. Click on the Update button. Click on the Save button.

Medical Billing Service Entry

Objective: Post a new medical billing service.

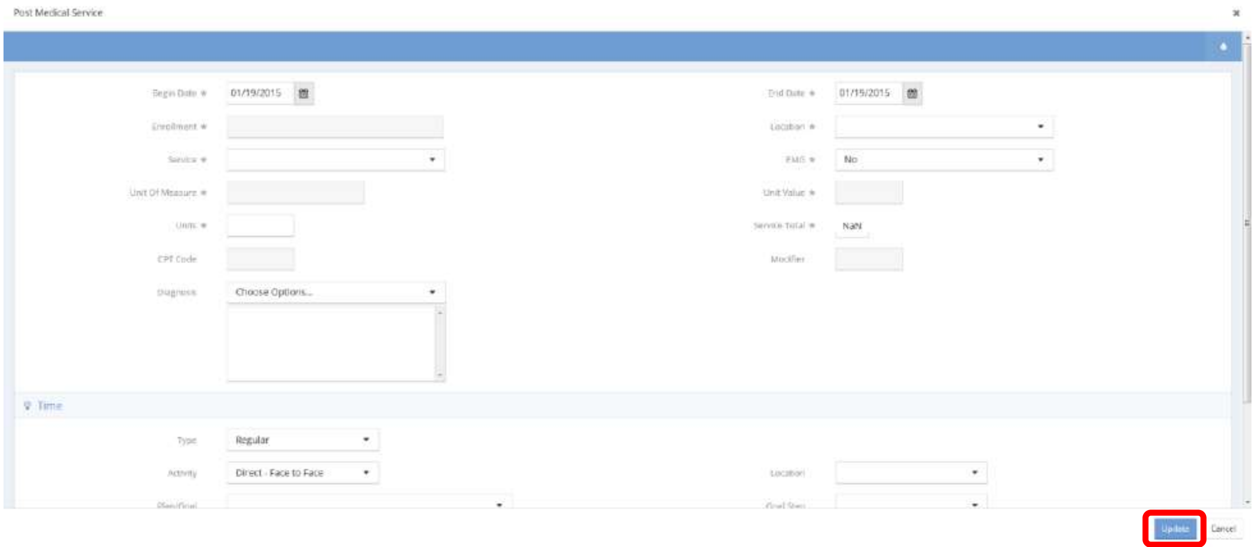


Click the Add New (Advanced) button.



Click the checkbox for Post Medical Service.

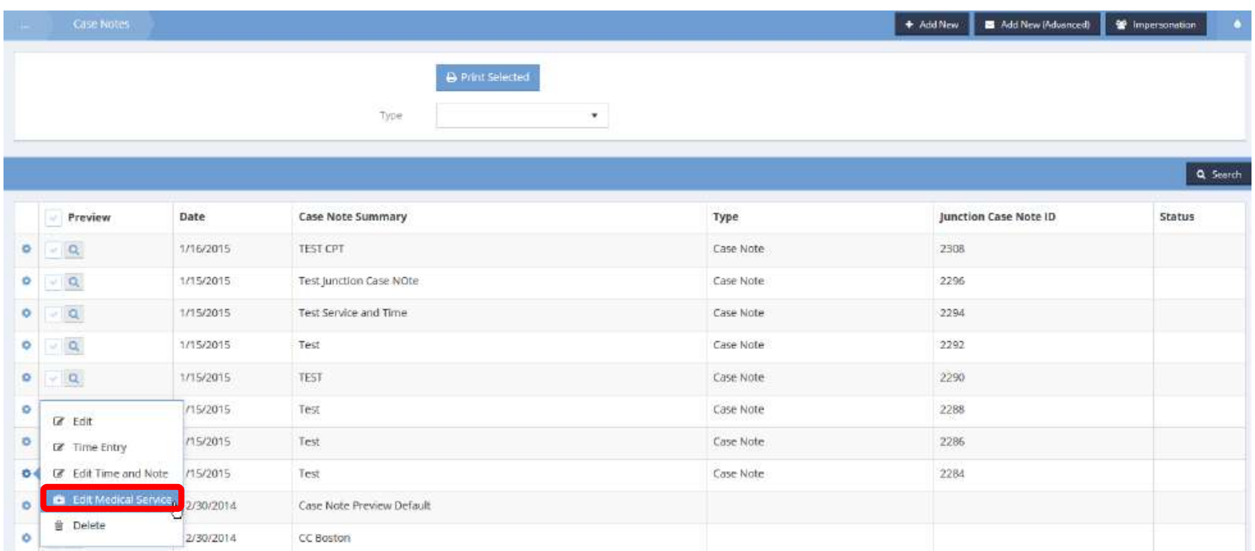
The Post Medical Service form displays in a new window.



Fill out all necessary info and click the Update button.

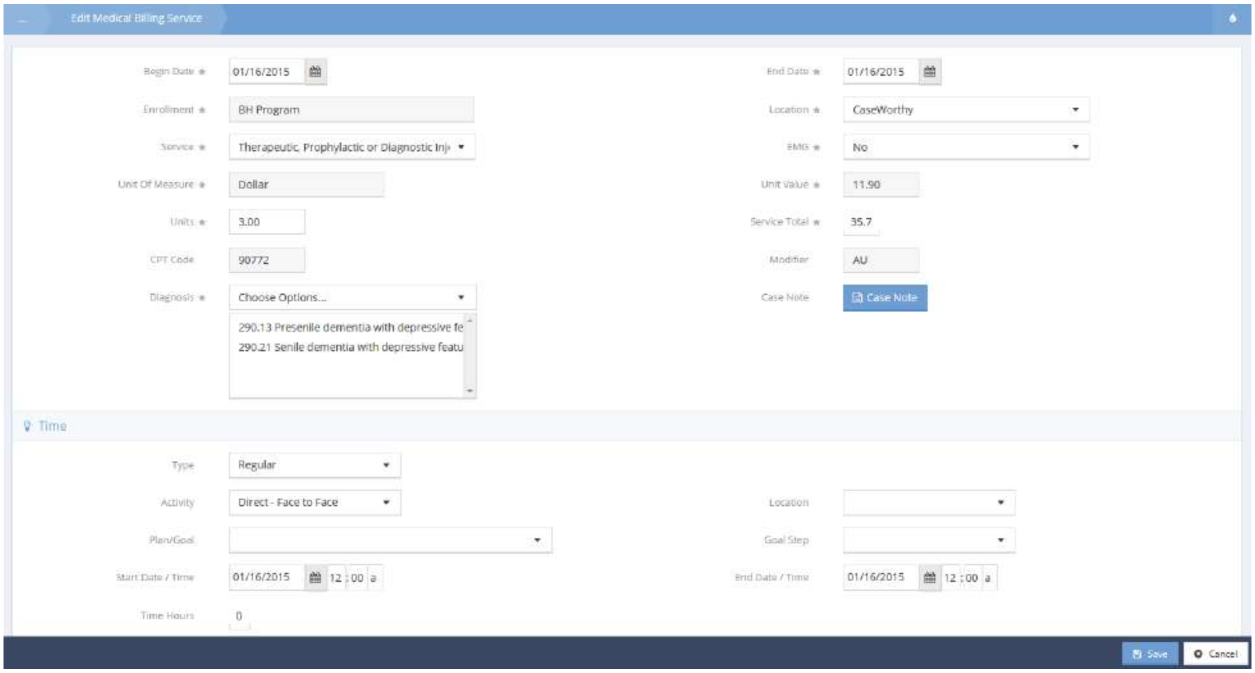
Edit Medical Billing Service

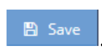
Objective: Edit a medical billing service.



Click the action gear on a relevant case note and click Edit Medical Service.

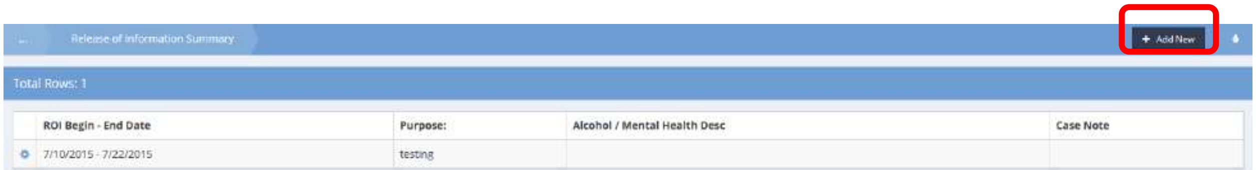
The Edit Medical Billing Service form displays.



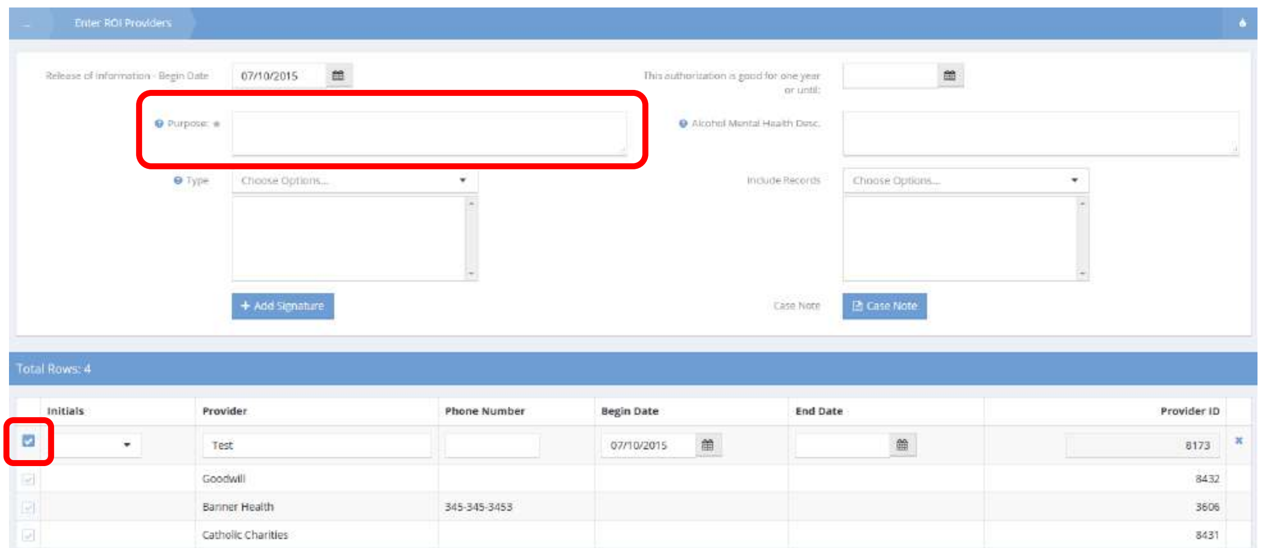
Make any necessary changes and click .

Release of Information

Objective: Manage release of information for clients.



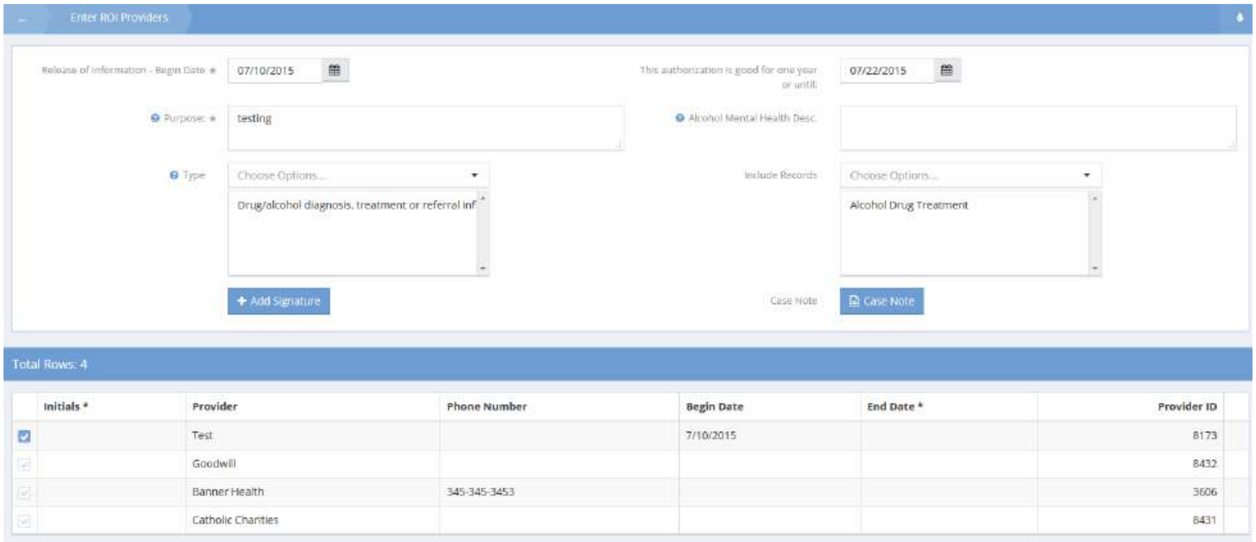
To add a new release of information, click the + Add New button. The Enter ROI Providers form displays.



Enter a purpose and any other available information. To select a provider, click the clear checkbox icon. Click Save when finished.

To edit, click the action gear icon and select Edit from the pop up menu.

The Enter ROI Providers form displays.



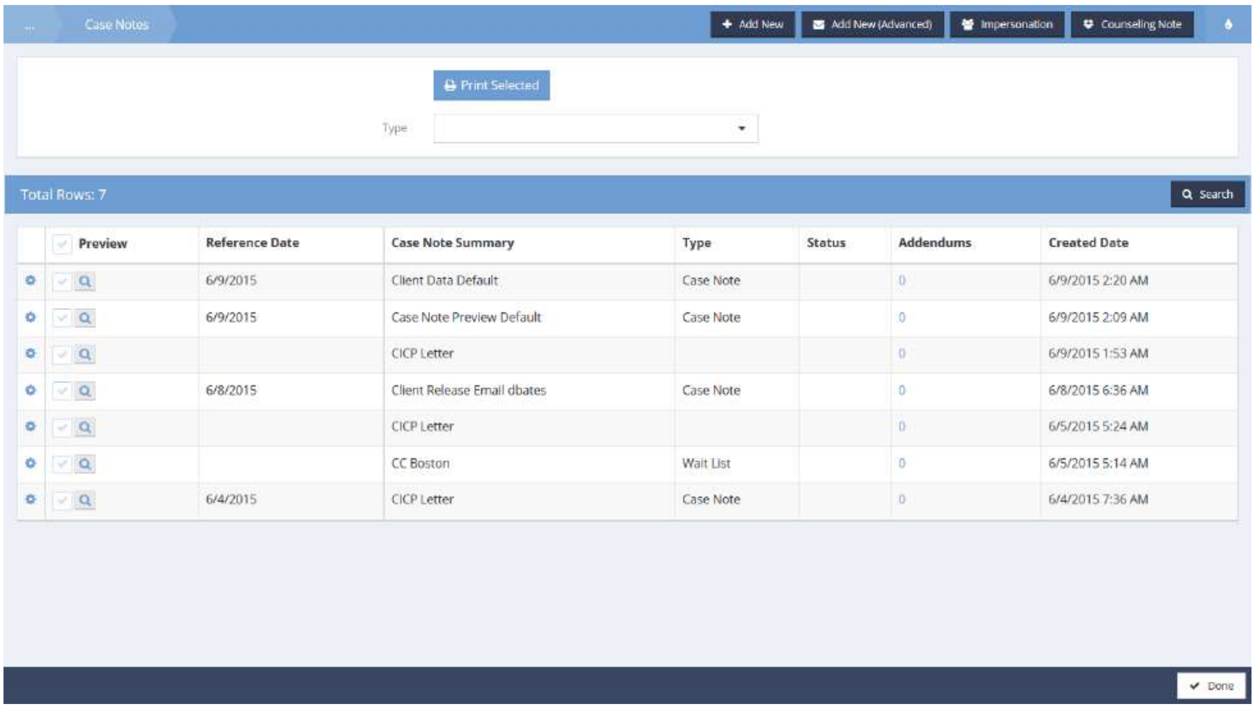
Make any desired changes and click Save when finished.

Addendums

Objective: Add an addendum to an existing case note.

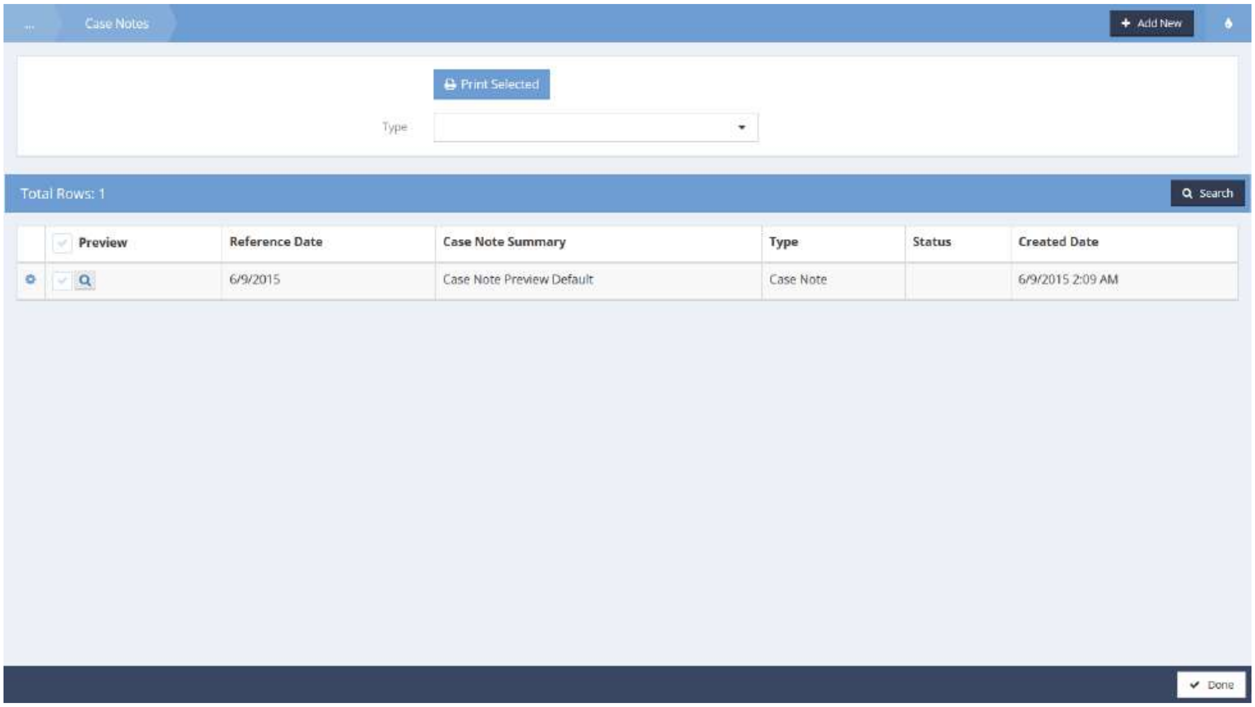
Navigation: Case Management>Case Management>Case Notes

The Case Notes form displays.

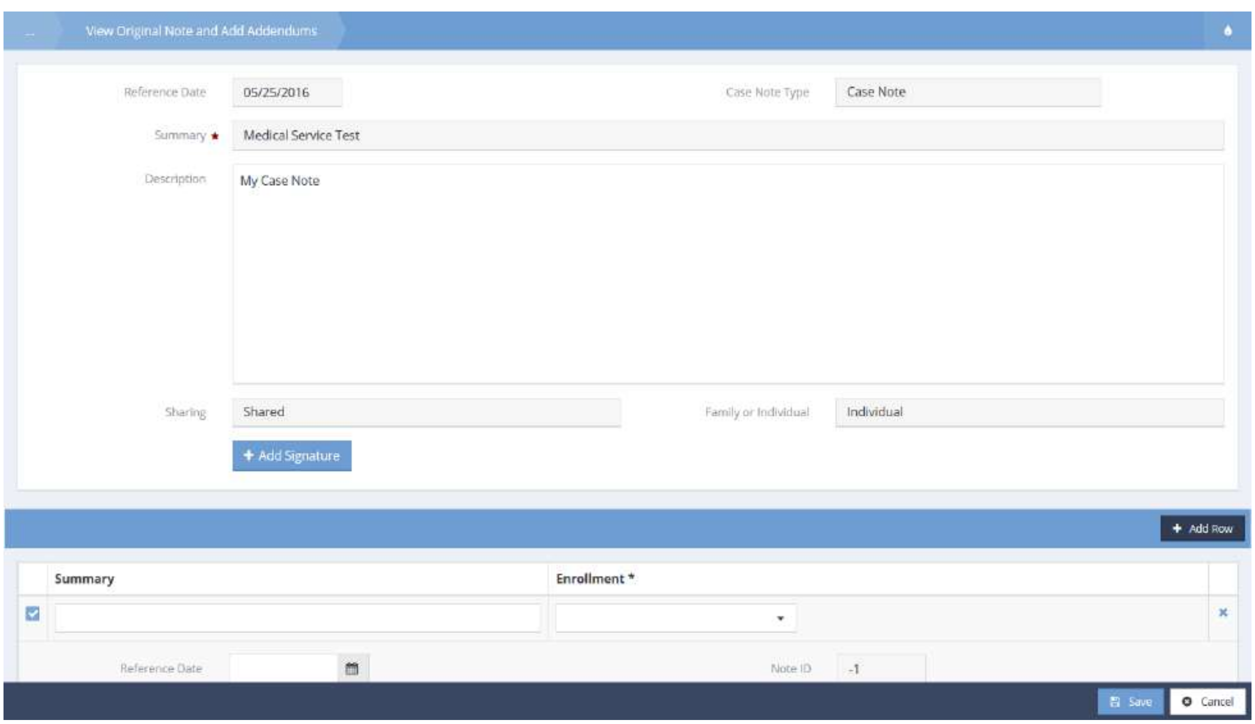


Click the hyperlink text under the Addendums column of the desire case note.

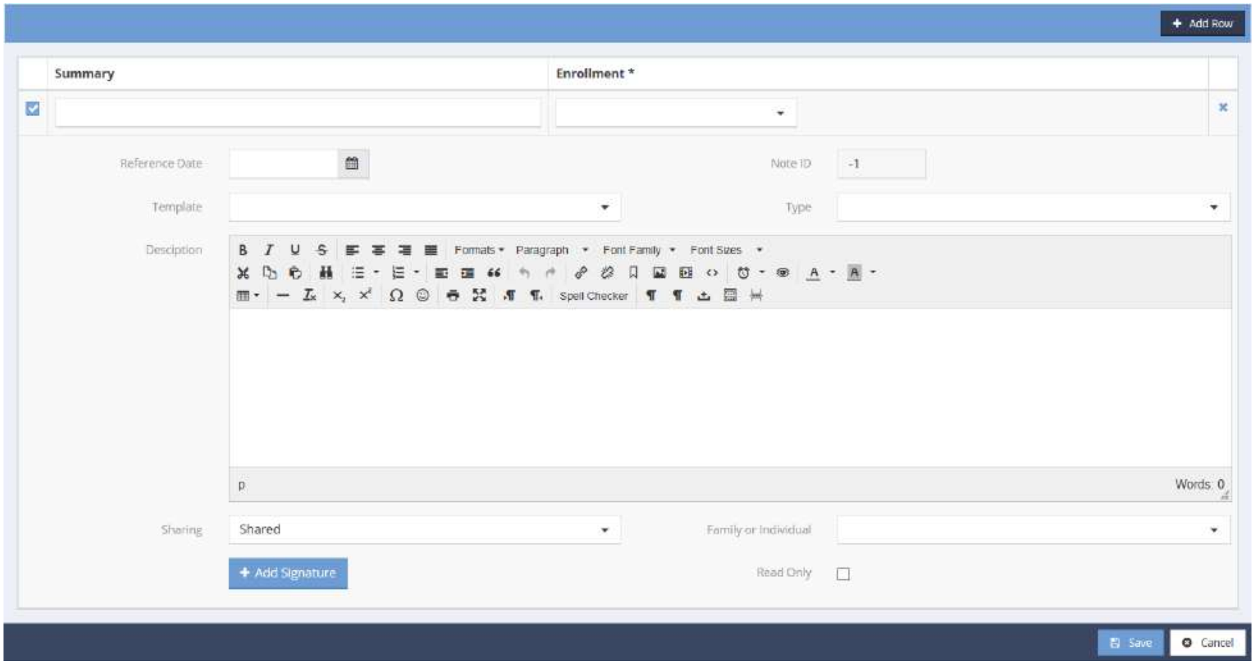
The Case Notes form displays.



The case note preview line displays. This form carries the same functionality as the general Case Notes form. To add an addendum however, click the **+ Add New** button. The View Original Note and Add Addendums form displays.

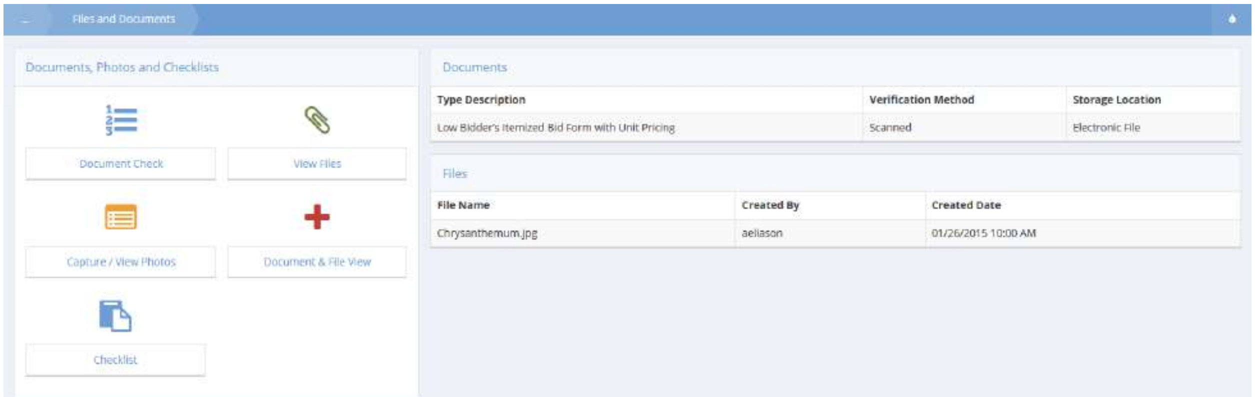


View the original case note and add addendums. Click the **+ Add Row** button to add the addendums.

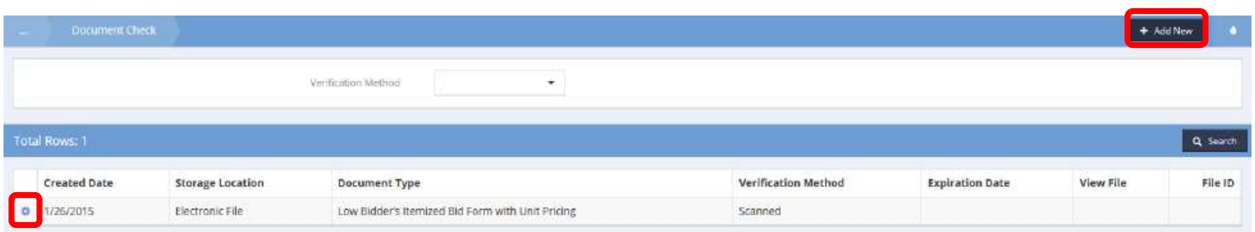


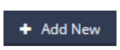
Simply add a summary of the addendum, and enrollment, and any other desired information, along with a longer description of the addendum. Save to close.

Documents and Checklists

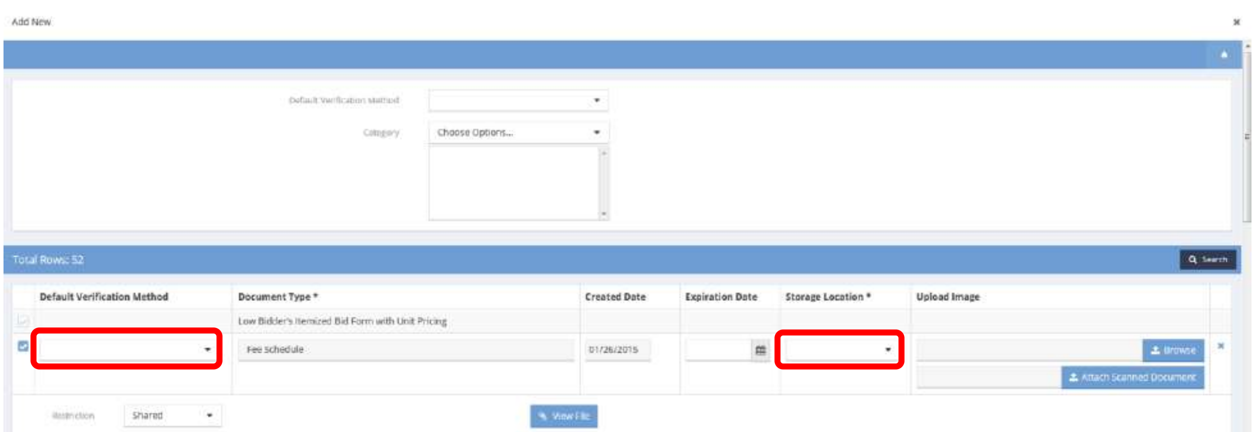


To record receipt or verification of documents, click the "Document Check" icon.



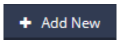
Click the  button to display the Add New pop-up window. To edit an existing document, click the action gear  and click Edit.

The Add New form displays.



Click the clear checkbox for a document type and use the drop-down lists to select the verification method and storage location. An expiration date can be entered if appropriate. Either scan the document in from a scanner linked to the computer or browse and select a file.

Select the “View Photos” icon. The Photo View/Set Default form displays. Use the 

button to select which picture is displayed on the Client Dashboard. To take or upload a new client photo, click the 

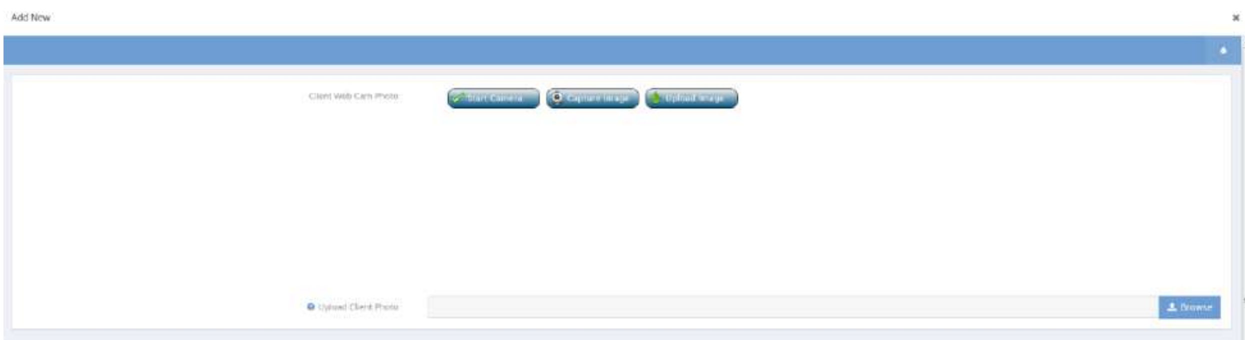
button.

Either navigate to the desired photo to upload or click 

and then click the 

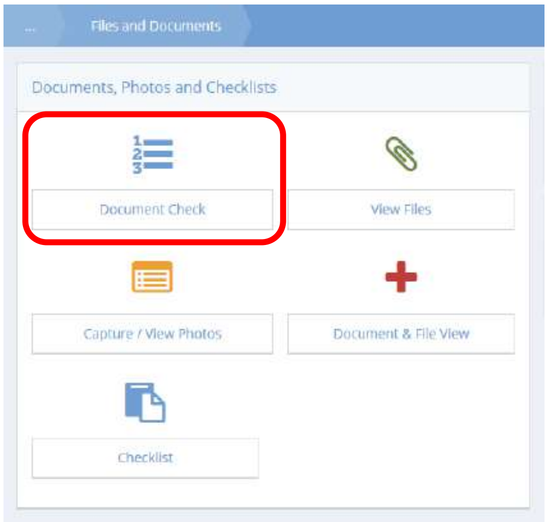
button. Click 

when finished.

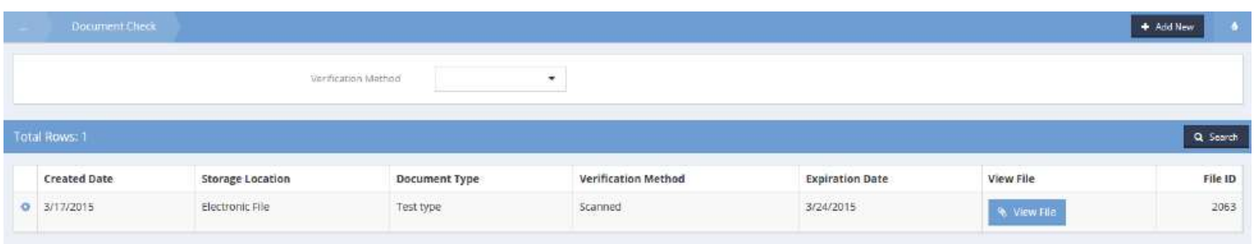


Client Documents

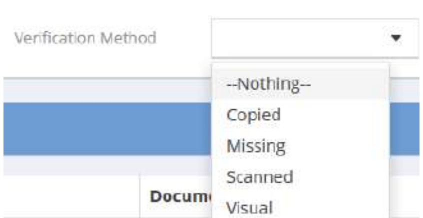
Objective: Edit or update information relating to client documents on file.



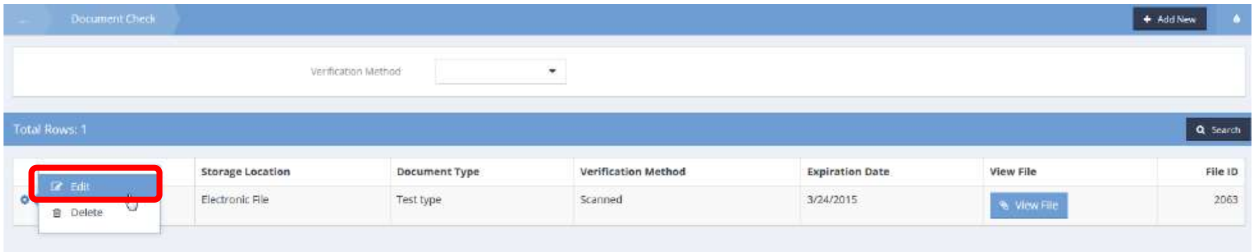
Click on the Document Check icon on the Documents, Photos and Checklists menu. The Document Check form displays a list of the current client's documents.



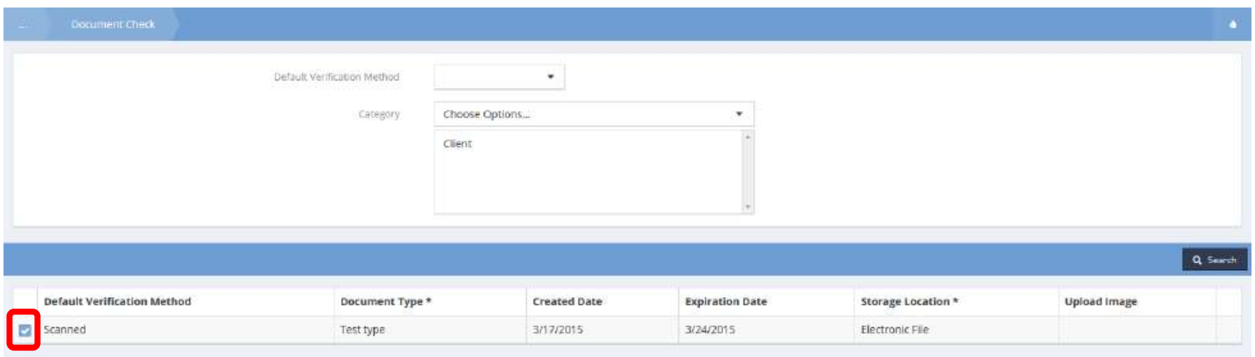
The list displayed on this form is filterable by Verification Method. If desired, click on the down arrow icon and select from the drop-down list that appears.



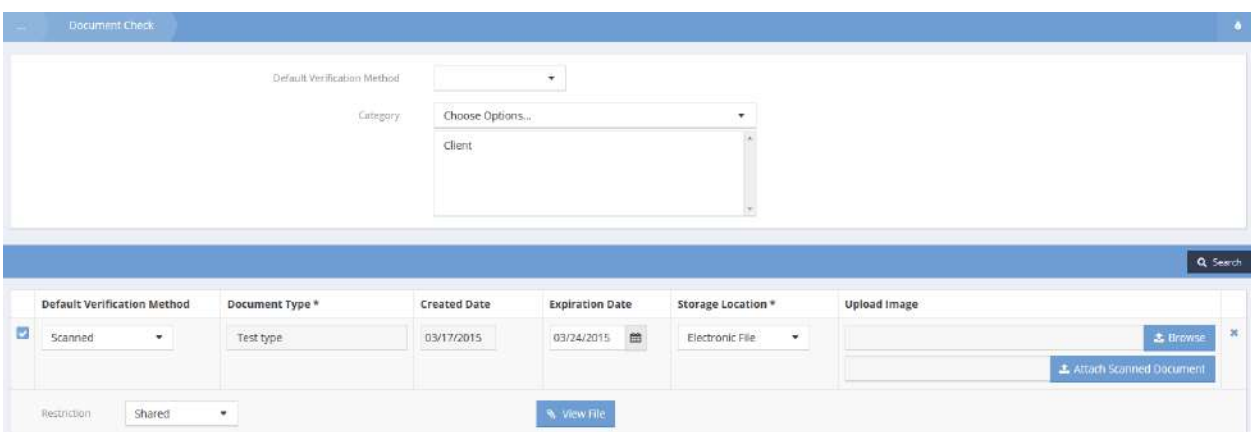
Click on the action gear icon associated with the desired document and select Edit from the pop up menu that appears.



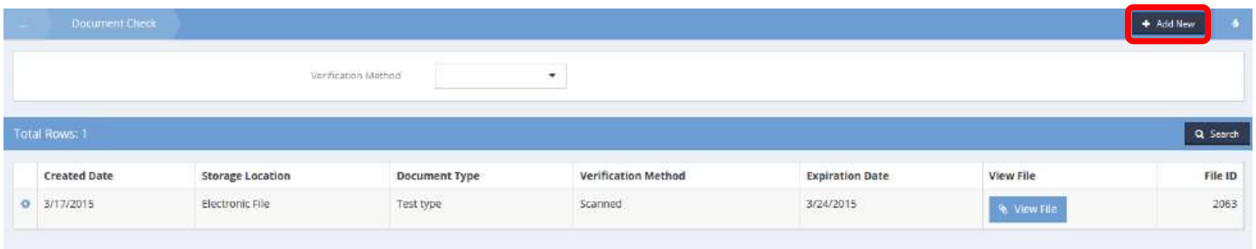
The Document Check form displays.



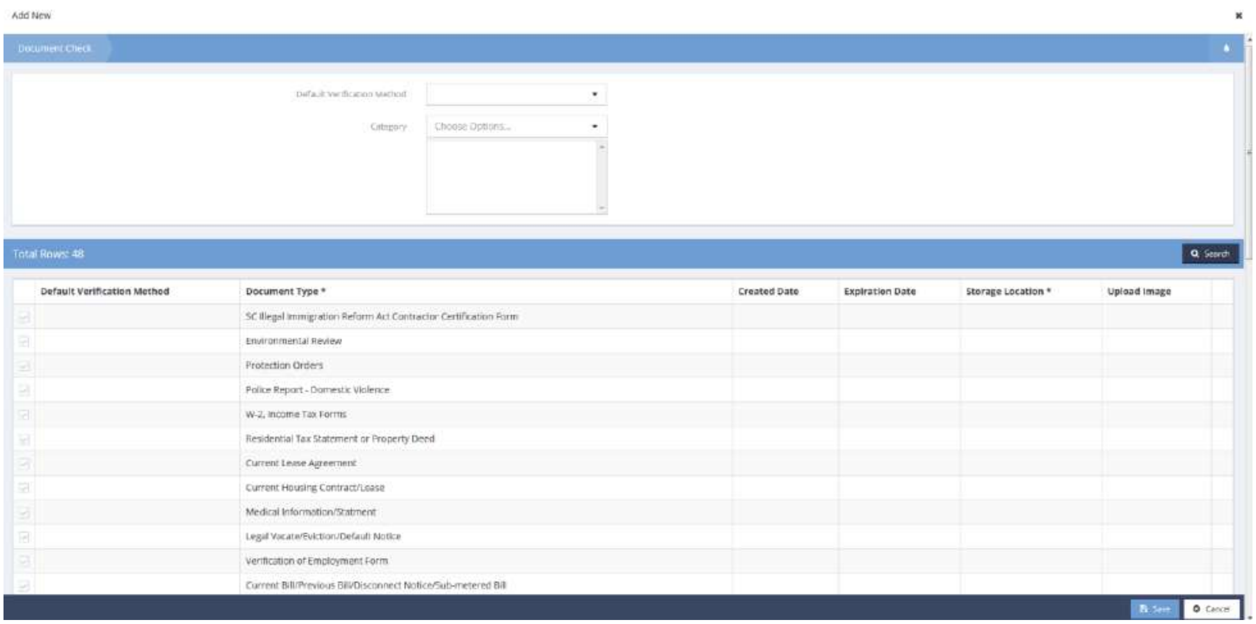
Click on the blue checkbox for the document. The row expands. Make any desired changes and click on the Save button.



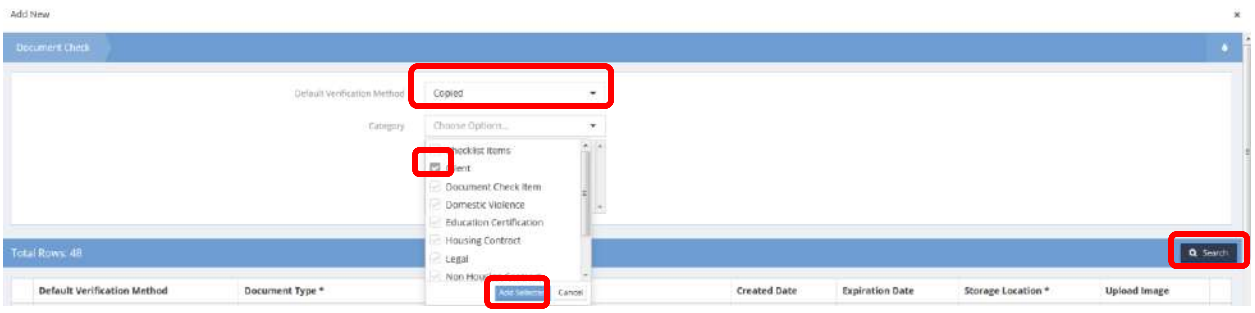
To add a new document, click the **+ Add New** button.



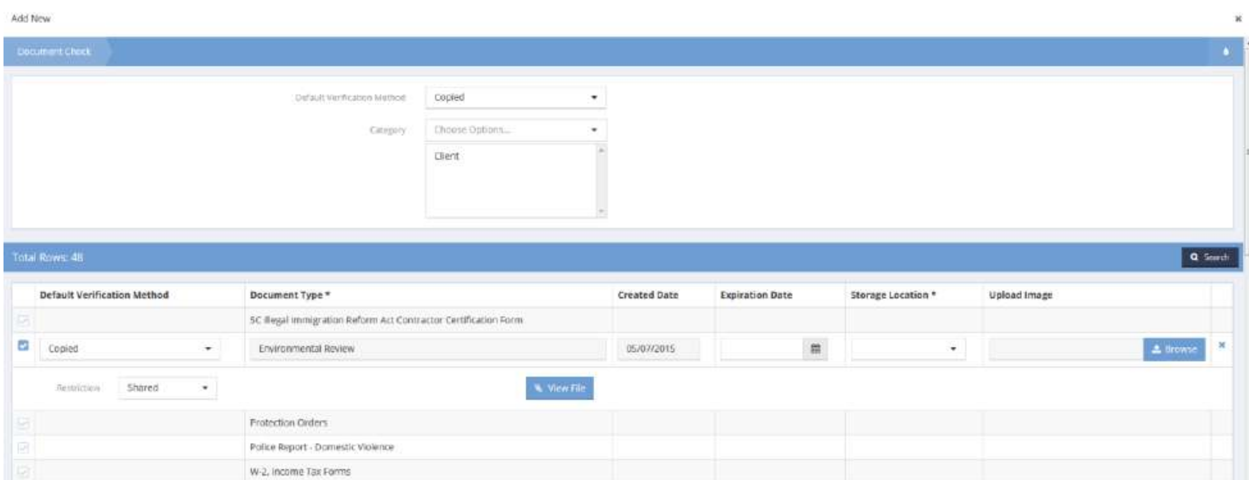
The Add New form displays.



Click on the down arrow icon for Default Verification Method and select the desired value from the drop-down list that appears. Do the same for Category, selecting multiple values if applicable. Click the Search button.

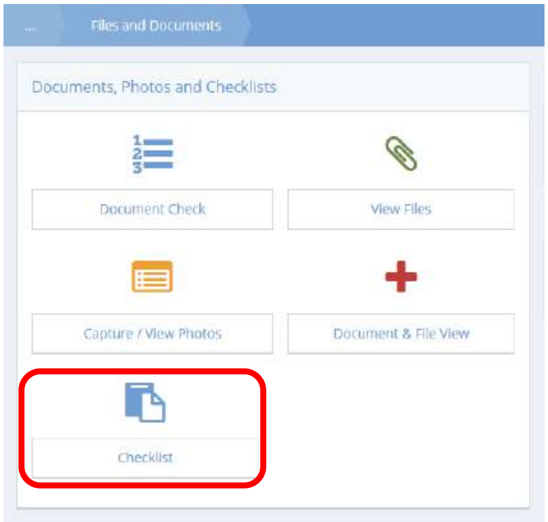


Click the clear checkbox to select a document type. The row expands. Select a storage location and click Browse to locate the file to be uploaded. Click Save when finished.



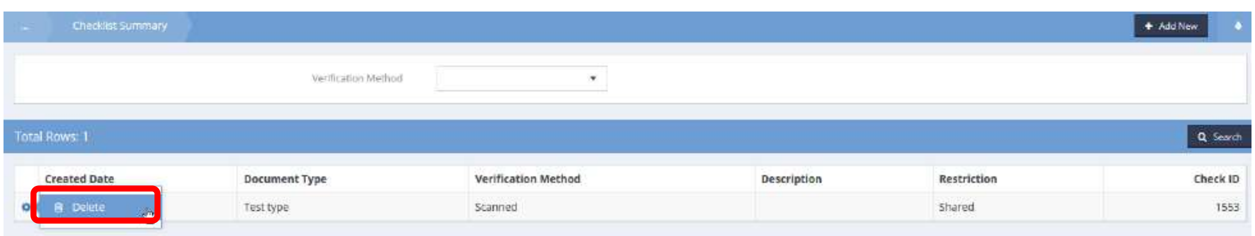
Checklist (summary) - Clients

Objective: Manage checklist items related to specific clients.

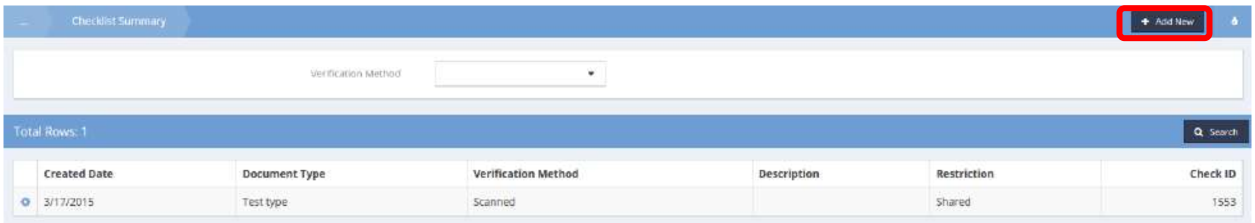


Click on the Checklist icon on the Documents, Photos and Checklists menu. The Checklist (Summary) form displays a list of existing checklists filterable by verification method.

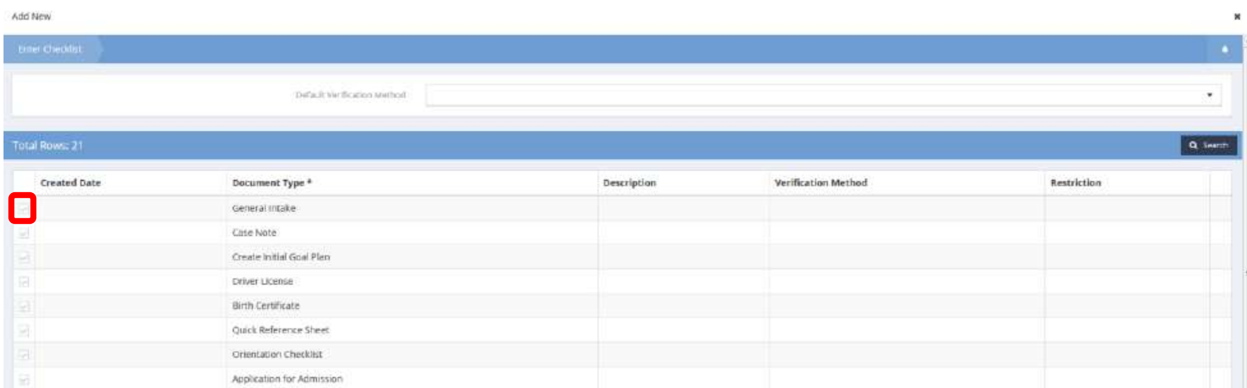
To delete an entry, click on the action gear icon associated with it and select Delete from the pop up menu that appears.



To add a new checklist item, click on the **+ Add New** button.



The Add New form displays.

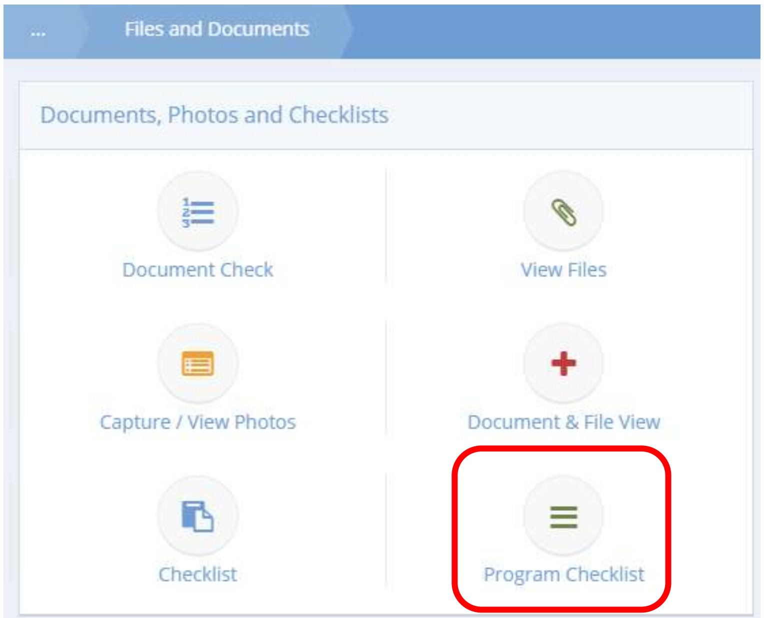


Select the desired document type by clicking on the clear checkbox icon associated with it. The row expands.

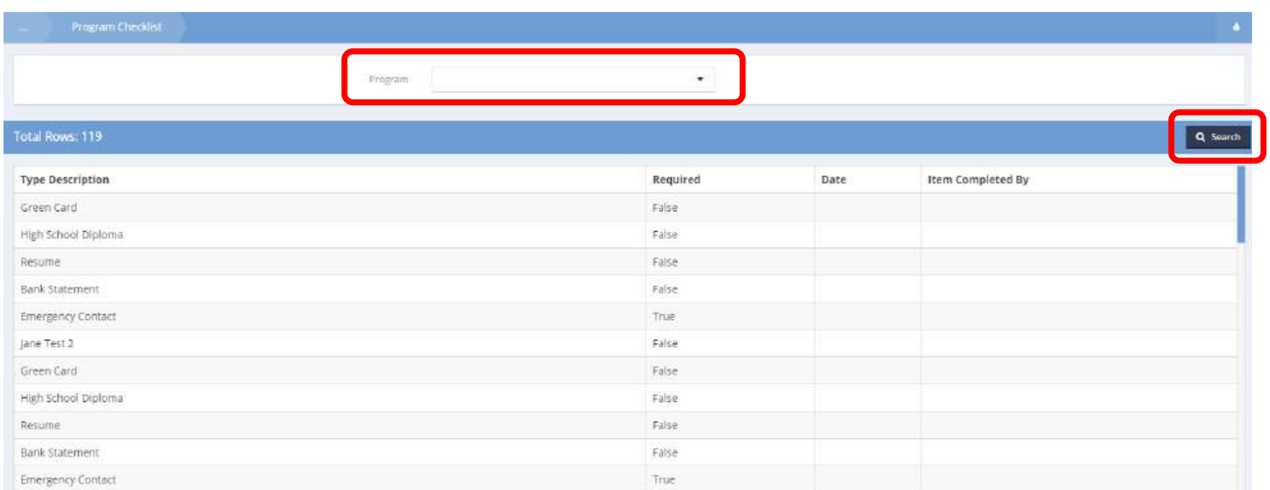
Enter a description. Click on the down arrow icon for verification method and select the desired value from the drop-down list that appears. Click on the down arrow icon for restriction and select the desired value from the drop-down list that appears. Click on the **Save** button.

Program Checklist

Objective: View a checklist of documents related to specific programs.

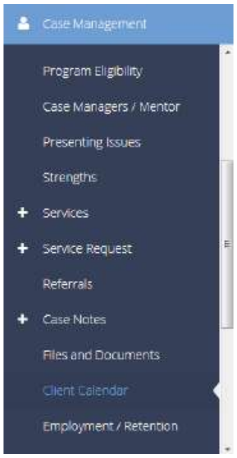


Click the icon for Program Checklist. The Program Checklist form displays.



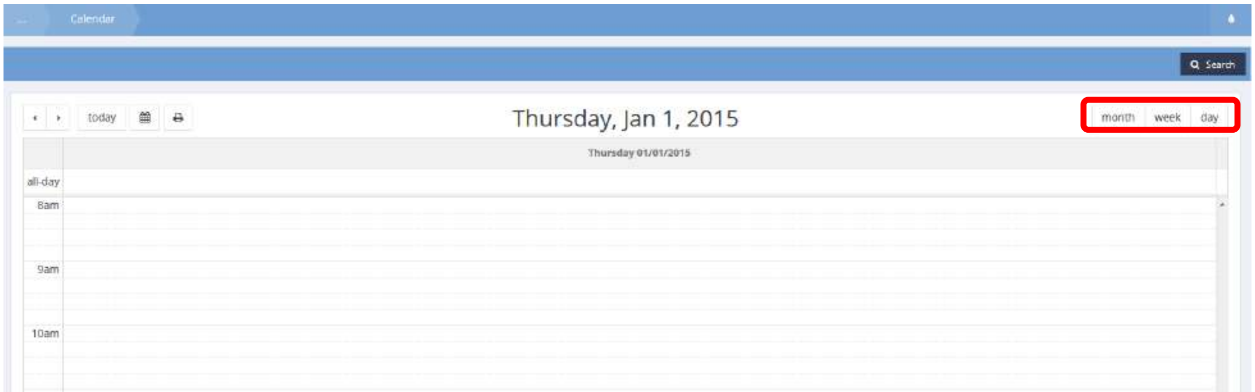
Use the program drop-down list and the Search button to filter the list by program. Any relevant documents display with requirement status, submitted date and by whom it was completed.

Client Calendar



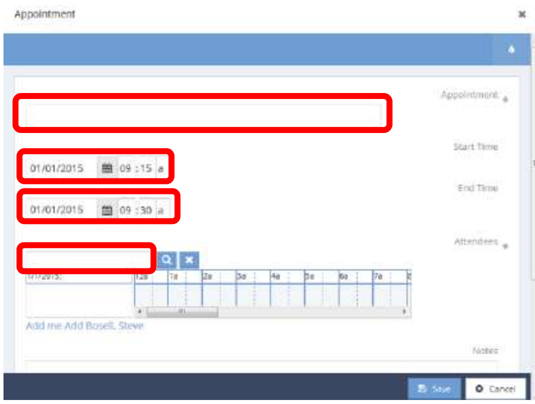
The next item in the Case Management menu group is the "Client Calendar." The client calendar allows a user to view and manage a client's appointments and follow-ups.

The calendar has day, week and month views.

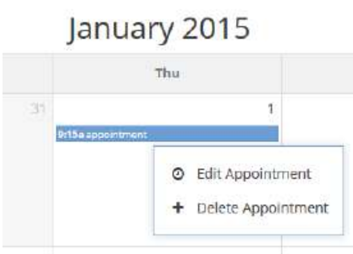


Simply click on the calendar to add a new appointment.

A pop-up window appears. Select a start and end time for the appointment. Add an appropriate administrator and/or the client to the appointment using the provided links. It is also possible to add the appointment to other users' or clients' calendars by using the attendee look-up.



By clicking on the appointment on the calendar, the user can edit or delete the appointment.

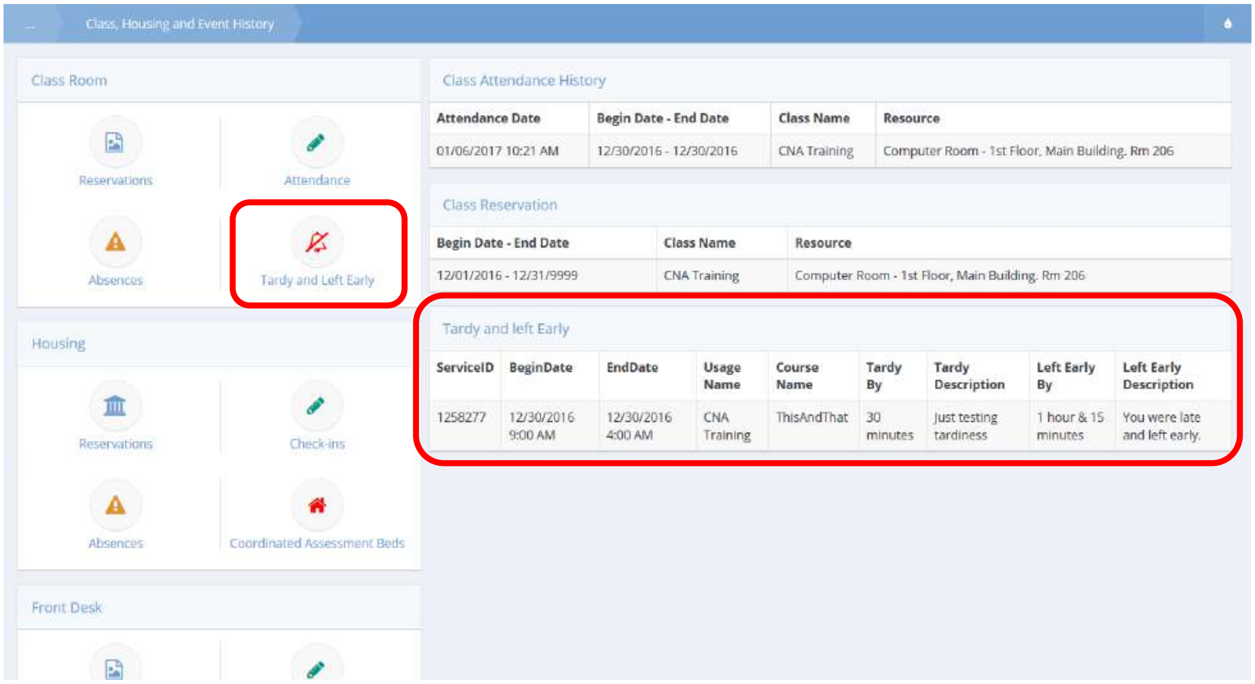


Class and Housing History

Objective: View the client's history of when they were tardy or left early.

Navigation: Case Management>Case Management>Class and Housing History

The Class, Housing and Event History dashboard displays.

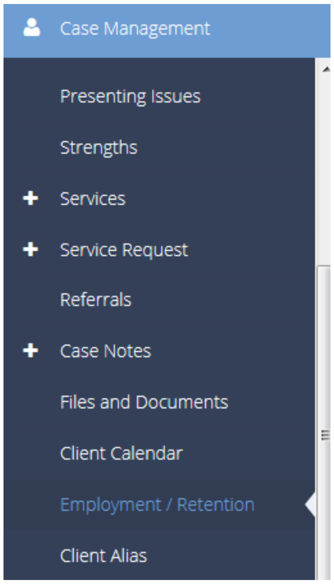


A Tardy and Left Early query displays the client's absence information. Or click on the Tardy and Left Early icon to view the same information.

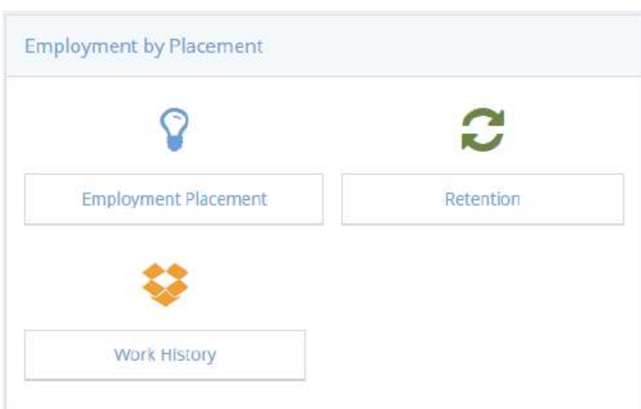
The Service Tardiness and Left Early Summary form displays.

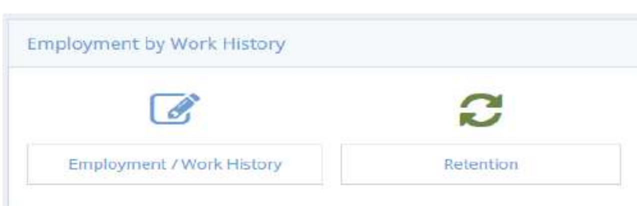
This is a view only form.

Employment / Retention



The next menu item on the Case Management menu is the "Employment/Retention" dashboard. This dashboard is used to manage a client's work history and employment placement information. Employment by Placement forms are used to track employment clients obtain because of support and assistance from the program they are enrolled in. Employment by Work History forms are used to document current or previous employment experiences typically obtained by the client prior to program enrollment.

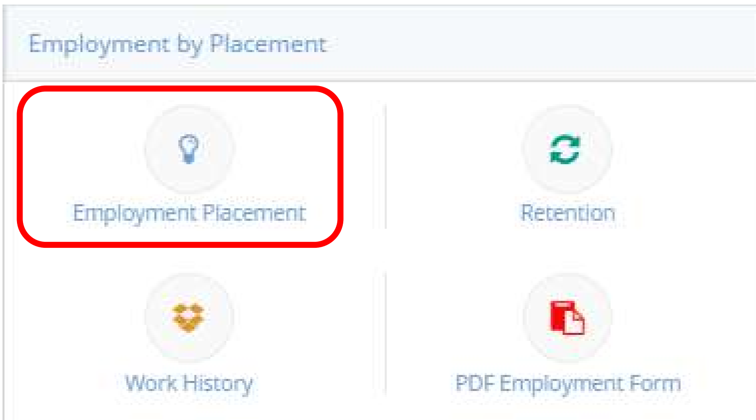




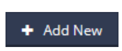
The "Employment by Work History" portion of the dashboard is used when tracking employment information with a placement. The forms used in this section are the same as in the "Employment by Placement" section.

Employment Placement

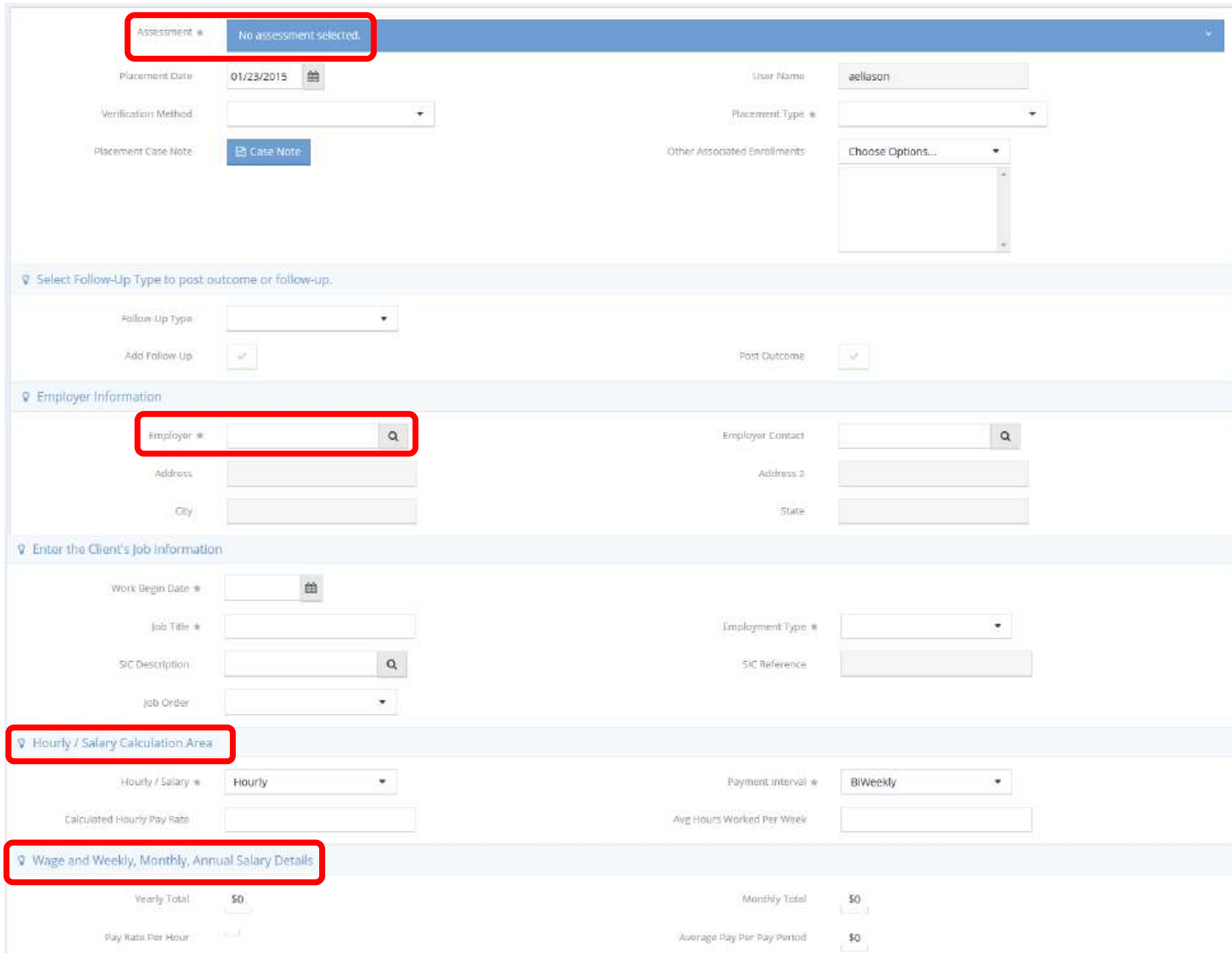
Select the "Employment Placement" icon on the Employment by Placement menu.



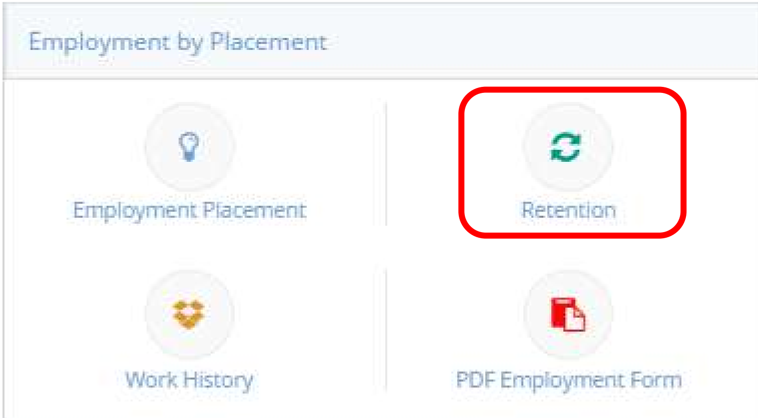
The Employment Placement Summary form displays.

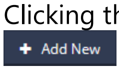
To add a new placement, click the  button in the top right corner.

Select an existing assessment string, or create a new one. Select an employer from the list of providers, or create a new employer. Enter employment specific information, and income information. The form automatically totals salary information.

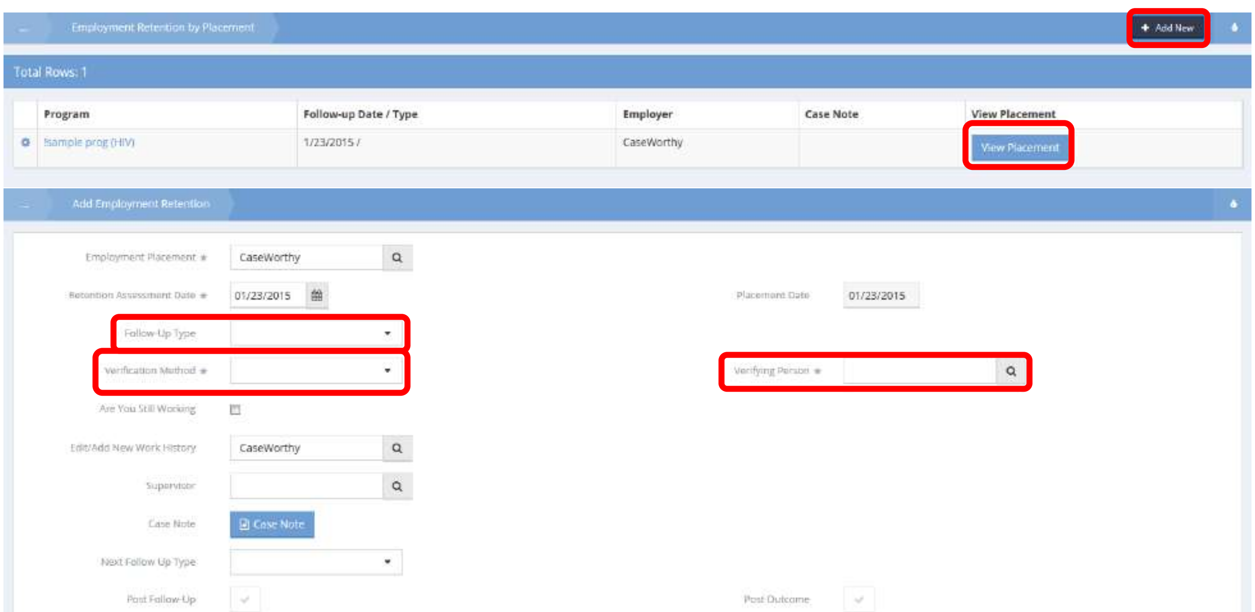


Retention

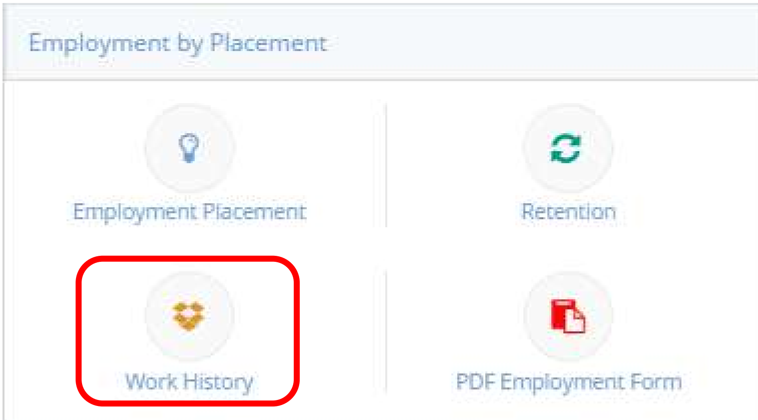


Clicking the "Retention" icon opens the retention summary form. To add a new retention, click the 

button in the top right corner. Enter a follow-up type and select a verification method. Use the look-up to denote the user who verified employment. The work information automatically populates below based on the most recent work history.



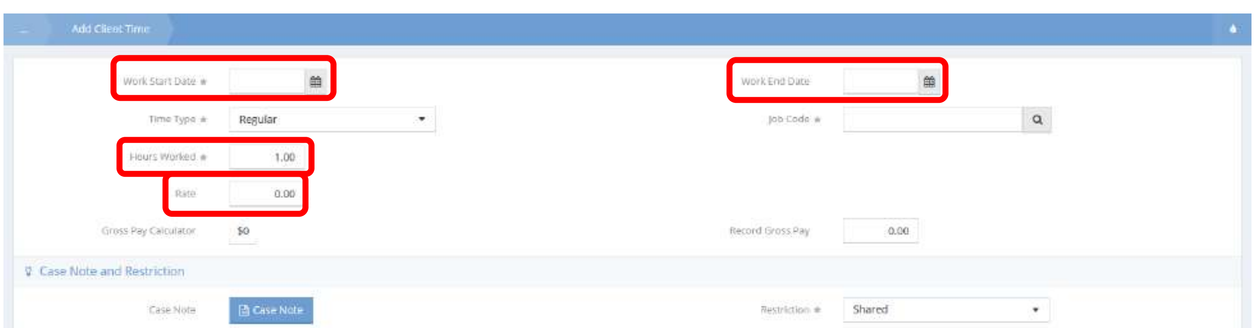
Work History



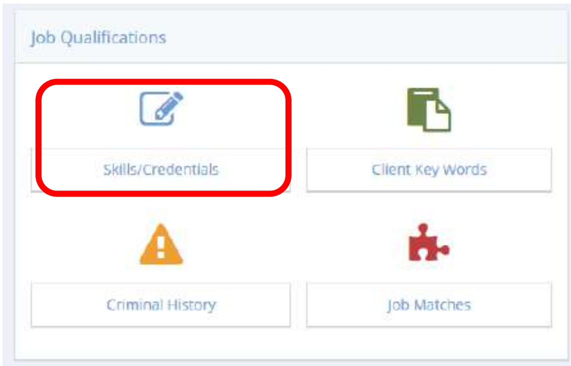
Clicking the "Work History" icon opens the work history summary form. Click the action gear, to link to the placement summary form or track the client's work time.

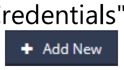
From the Client Work Time Summary form, click Add New to enter a client's time or click the action gear and click Edit to edit an existing entered time.

Enter the start and end dates to track the time a client has worked, then enter the hours and the rate of pay. The form calculates the client's gross pay.



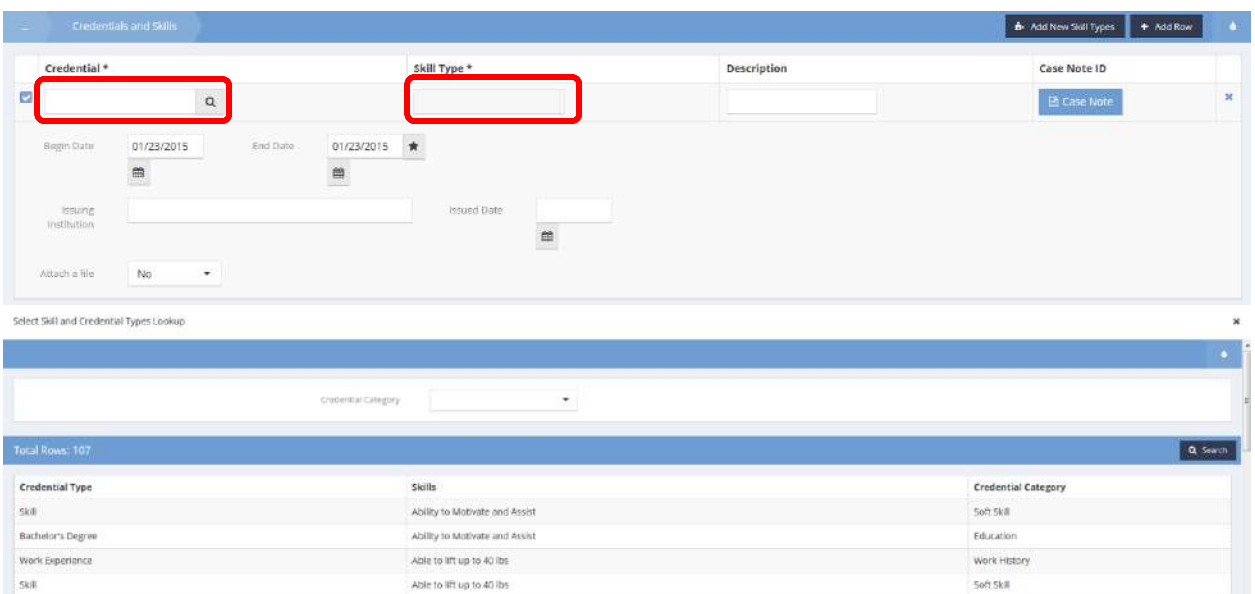
Skills/Credentials



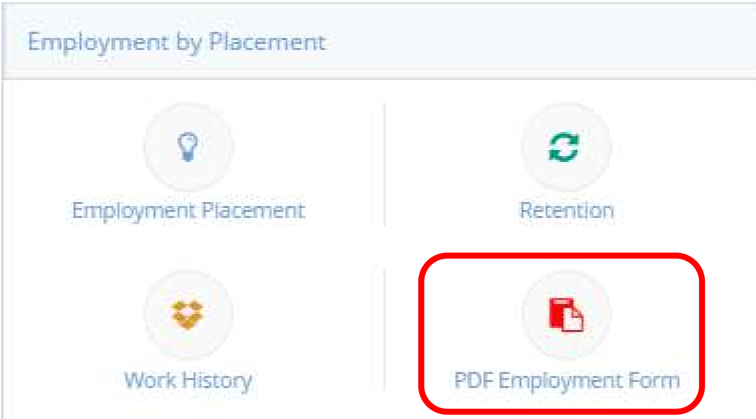
Clicking the "Skills/Credentials" icon opens the skills and credentials summary form. To add new skills and credentials, click the 

button in the top right corner.

Select a credential and the skill type associated with it using the magnifying glass icon. The Select Skill and Credential Lookup form displays. Select one and the Credentials and Skills form displays. Enter the begin and end dates, issued date, and issuing institution if applicable.



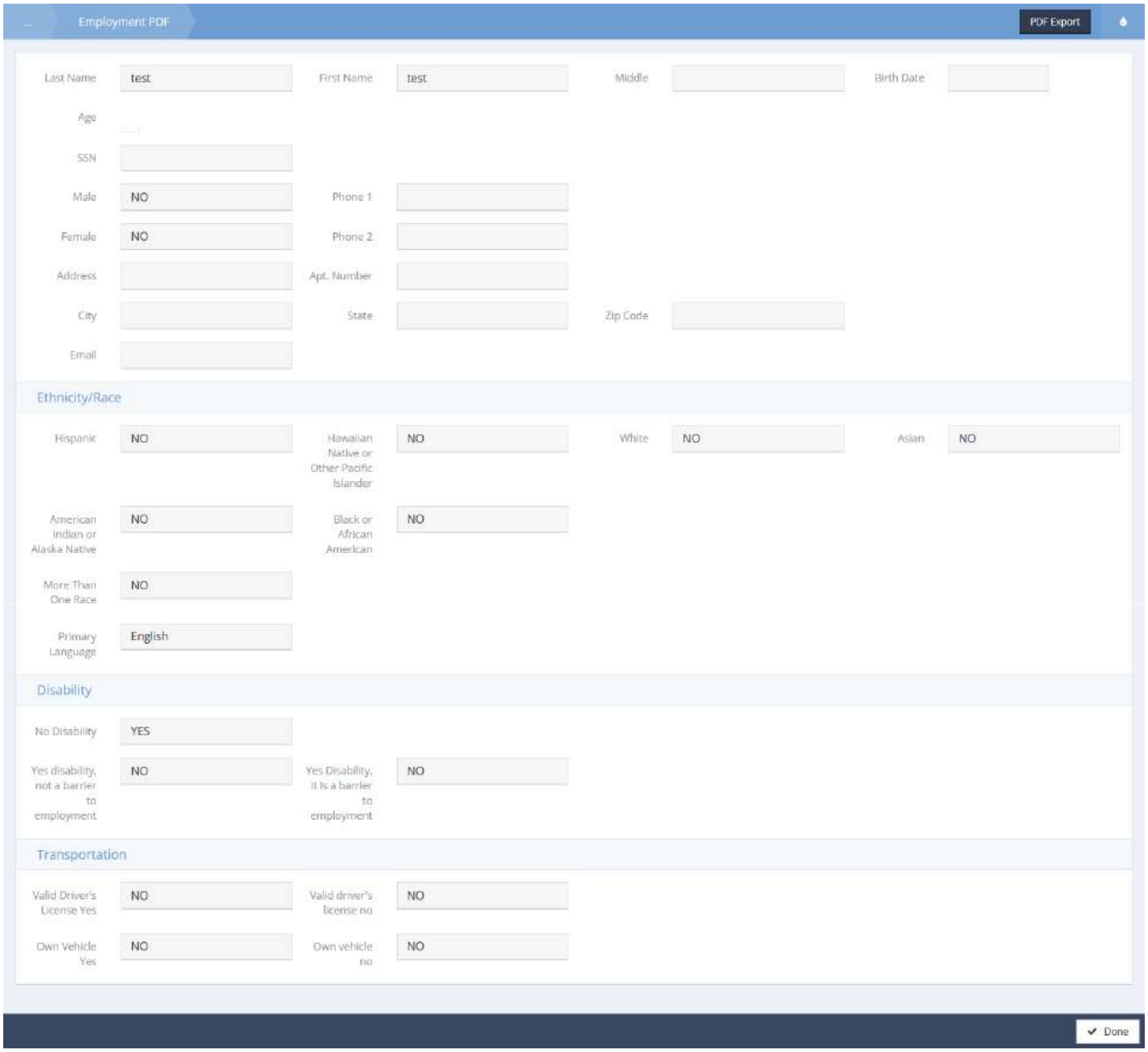
PDF Employment Form



Objective: Create a PDF of a client's employment information.

Navigation: Case Management>Case Management>Employment and Retention>PDF Employment Form

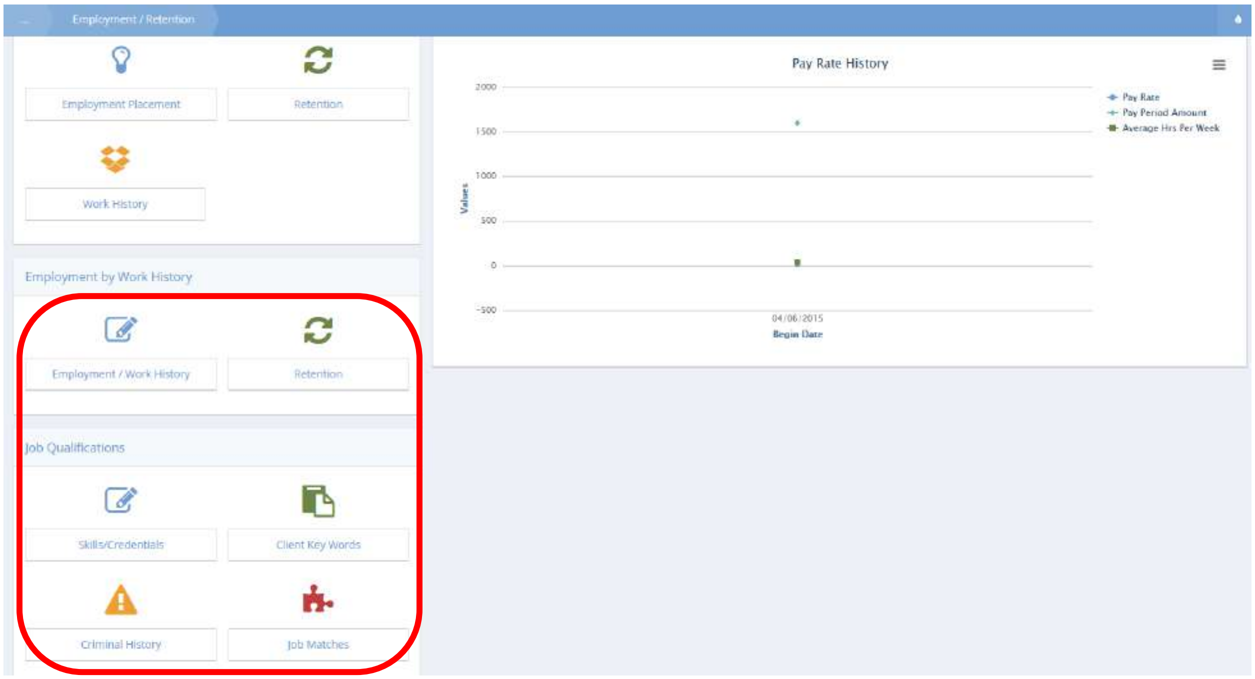
The Employment PDF form displays. (See next page)



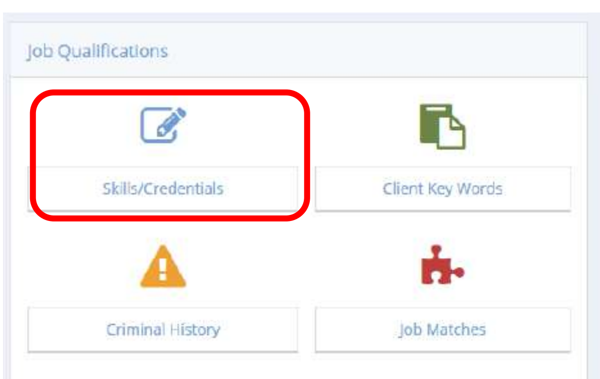
This form is simply a view only version of Employment information. Click the PDF Export button to save as a PDF.

Job Match

Objective: Manage client employment assistance with this new functionality that matches client work experience, skills and credentials with job openings.



Client Skills and Credentials

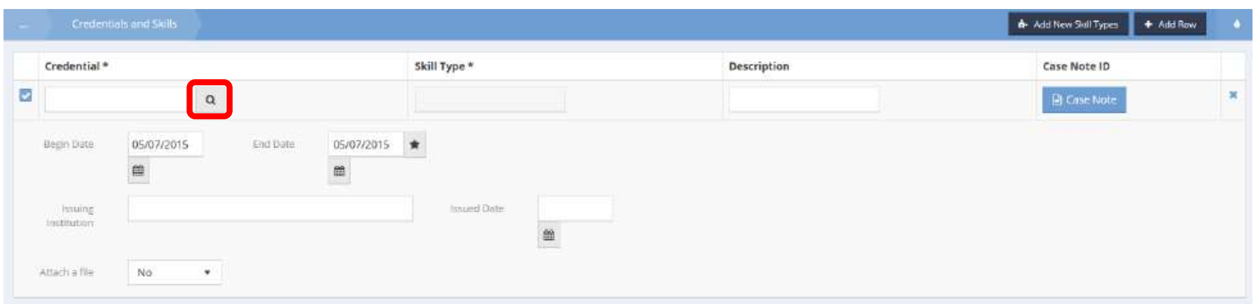


Click on the "Skills/Credentials" icon on the Job Qualifications menu. The Credentials and Skills Summary form displays.

Credentials and Skills Summary (New)

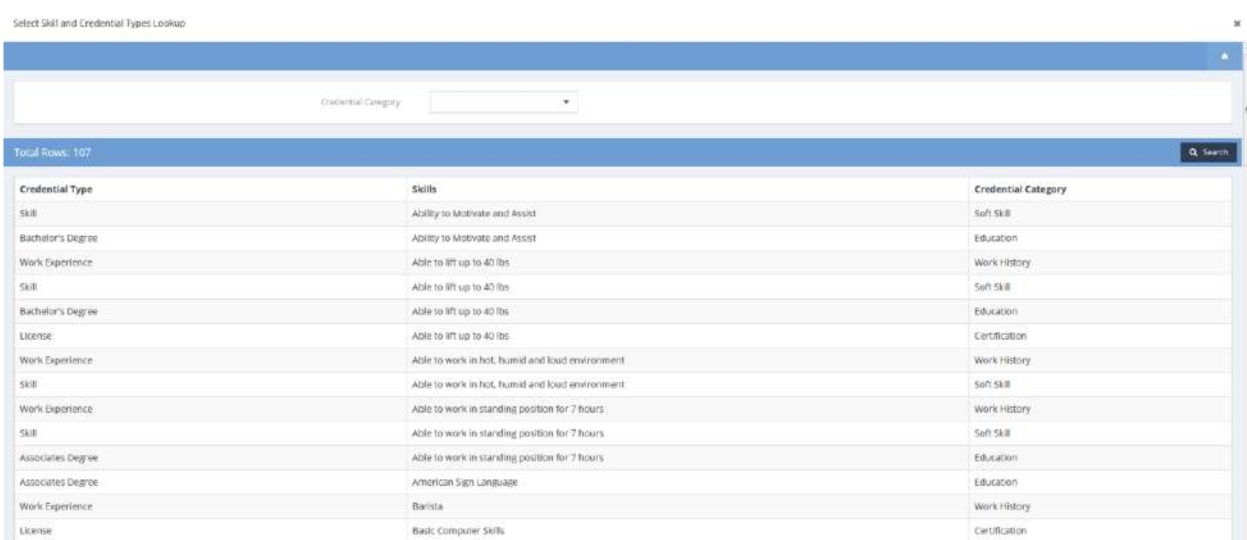
Click on the Add New button. A new, expanded row appears on the form.

Credentials and Skills (New)

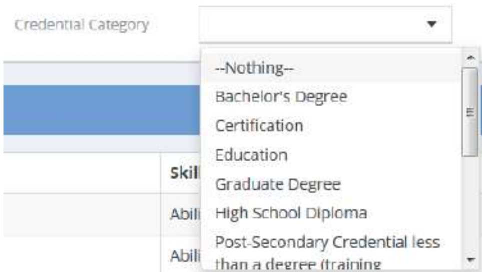


Click on the magnifying glass icon. The Credential Lookup form opens.

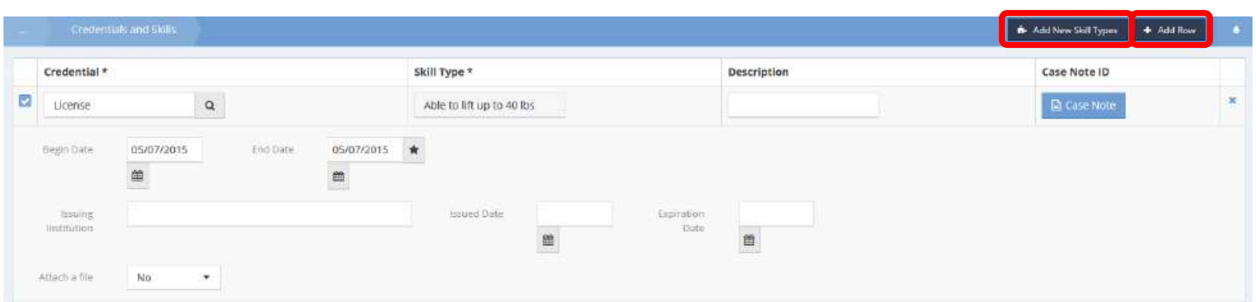
Select Skill and Credential Types Lookup



Click on the Credential Category field. Select the desired credential category from the drop-down list that appears.



Select the desired skill or credential from the list presented. The associated field on the Credentials and Skills form fills.

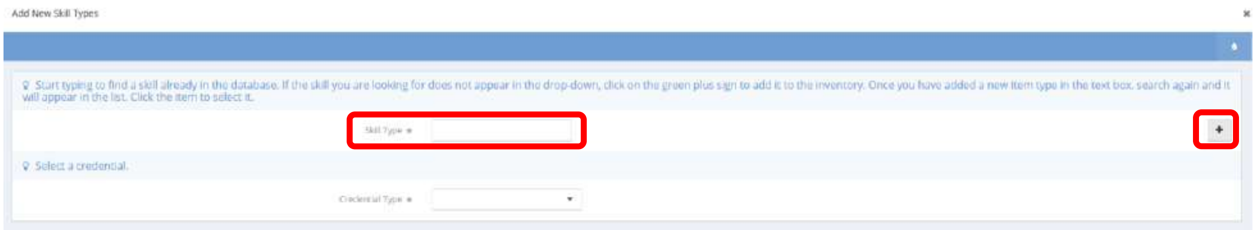


Add a description or case note, alter the begin date and end date, attach a file and enter the length of experience in months if desired. If finished, click on the Save button.

To add another skill or credential, click on the Add Row button and repeat the process.

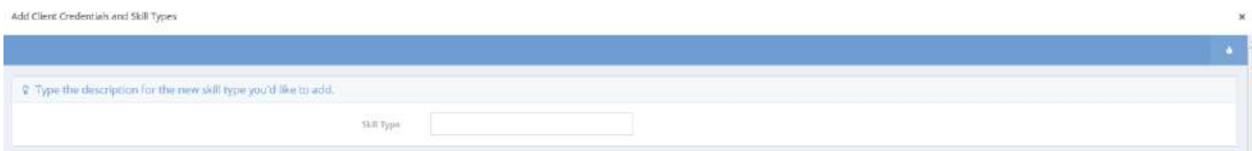
To add a *new* skill or credential to the database list, click on the Add New Skill Types button. The Add New Skill Types form displays.

Add New Skill Types

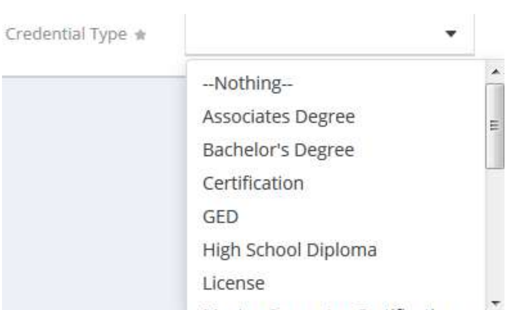


Start typing in the Skill Type field to find a skill already in the database. If the skill being searched for does not appear in the drop-down, click on the plus sign + to add it to the inventory. The Add Client Credentials and Skill Types form displays.

Add Client Credentials and Skill Types



Type the description of the new skill in the Skill Type field and click on the Save button. The Credential and Skill Types Add New (Client) form reappears. Search again and the new item type appears in the list. Click the item to select it. Click on the Credential Type field and select the desired value from the drop-down list that appears.

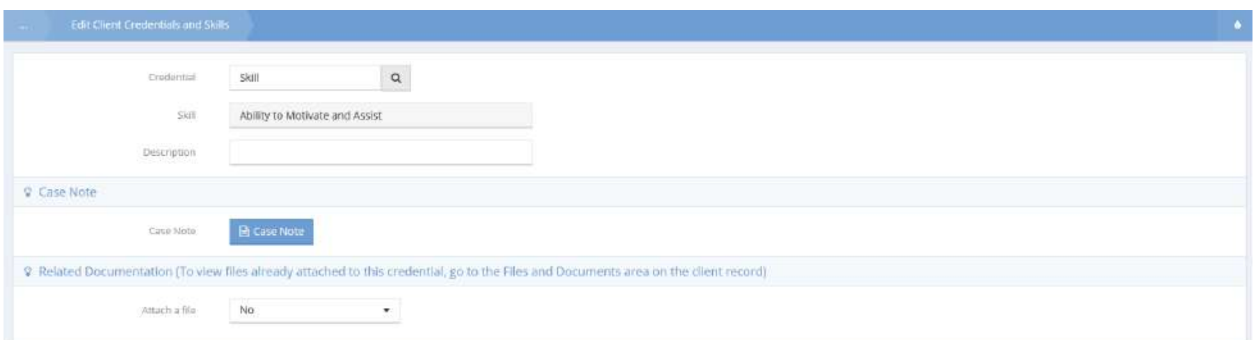


Click on the Save button. The Credential and Skills form reappears. Add more skills if desired. When all desired skills and credentials are added, click on the Save button.

The Credentials and Skills Summary form displays.

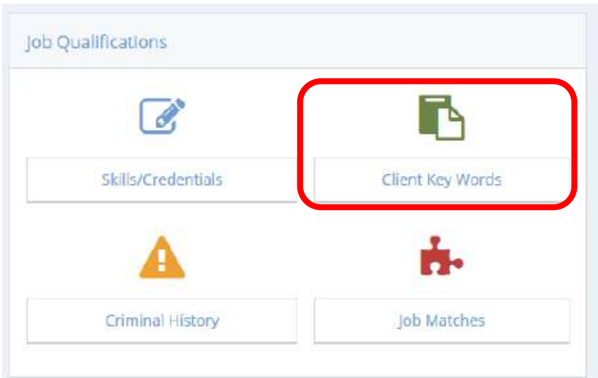
To edit an existing skill or credential, click on the action gear icon associated with it. Select Edit from the pop up menu that appears. The Edit Client Credentials and Skills form displays.

Credentials And Skills Client (Edit)



Make any desired changes and click on the Save button. This completes the Client Skills and Credentials area.

Client Keywords



Click on the "Client Key Words" icon on the Job Qualifications menu. The Client Keywords Summary from displays.

Client Keywords Summary

To view, add or edit job opening keywords already in the system, click on the **+ Add/Edit Keywords from Job Openings** button. The Client Keywords Spreadsheet form displays.

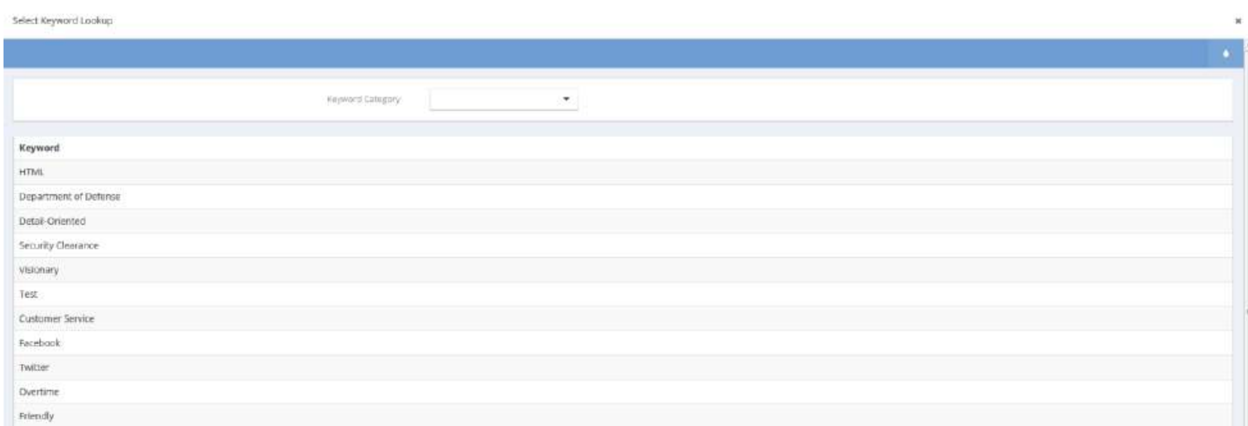
Client Keywords Spreadsheet

Click on the **+ Add Row** button.

A new, expanded row appears on the form.

Click on the magnifying glass icon. The Keyword Lookup form displays the list of keywords already entered into the system through job openings.

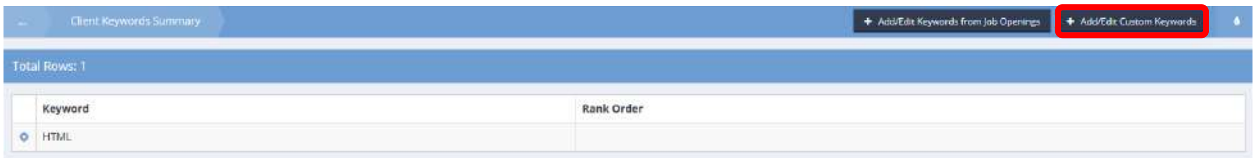
Select Keyword Lookup



This list is filterable by Keyword Category. This allows the user to determine if the desired keyword (or one describing the same attribute) exists in the system or if it needs to be added. If the keyword exists, select it by clicking on it. The Keyword Lookup form closes and the Client Keyword Spreadsheet displays the selected keyword.

Click on the down arrow icon for Rank Order and select a value from the drop-down list that appears.

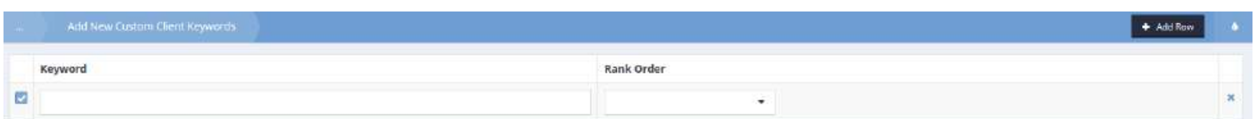
Add as many keywords as desired by repeating the process and click on the button. The Client Keywords Summary form displays with the previously selected keywords.



To add a new custom keyword, click on the button. The Add New Custom Client Keywords form displays a list of keywords specific to this client.

Add/Edit Custom Client Keywords

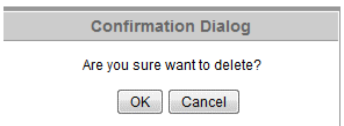
To add a keyword, click on the button. A new, expanded row appears. To edit an existing keyword, click the checkbox icon next to it.



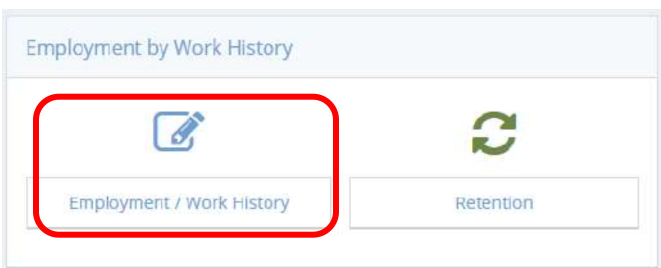
Enter the new keyword into the Keyword field and assign a Rank Order to it. Click on the button. The Client Keywords Summary form displays with the previously selected keywords.

To delete a keyword, click on the action gear icon associated with it and select Delete from the pop up menu that appears.

Click on OK in the Confirmation Dialog box that displays.



Employment / Work History

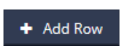
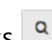


Click on the Employment / Work History icon in the Employment by Work History menu. The Client Work History Summary form displays.

Click on the action gear icon associated with the desired work history. Select Work Experience from the pop up menu that appears.

The Credentials and Skills form displays.

Work Experience (Add New)

Click on the  button. A new, expanded row appears. Click on the magnifying glass  icon. The Select Skill and Credential Types Lookup form displays.

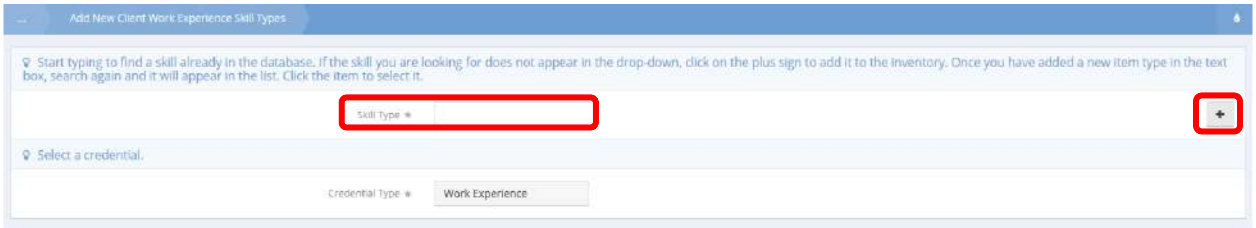
Skill & Credential Work Experience (Select)


Select Skill and Credential Types Lookup

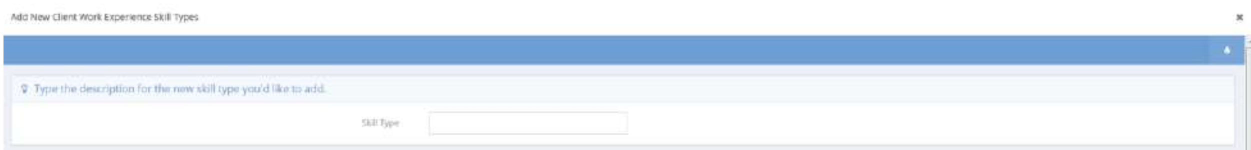
Credential Type	Skill Type
Work Experience	Able to lift up to 40 lbs
Work Experience	Project Management
Work Experience	Able to work in standing position for 7 hours
Work Experience	Word Processing and Spreadsheets
Work Experience	Able to work in hot, humid and loud environment
Work Experience	Web Design
Work Experience	Cleaning
Work Experience	Texas Teechers Association
Work Experience	Barista
Work Experience	Line Cook
Work Experience	Stocking Shelves
Work Experience	Customer Service
Work Experience	Hunting Lisence

If the desired skill type is on the list, select it by clicking on it. If not, click on the ✖ button and select the **Add New Work Skill Types** button. The Add New Client Work Experience Skill Types form displays.

Add New Client Work Experience Skill Types



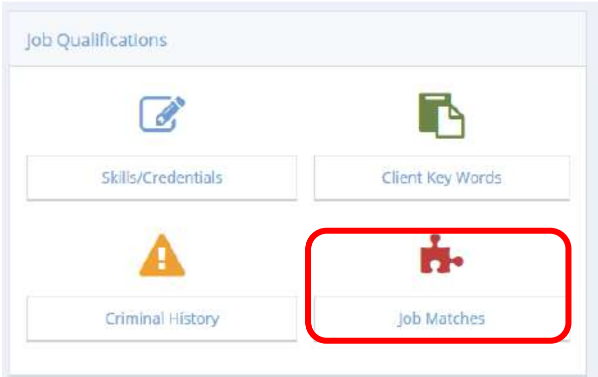
Start typing in the Skill Type field to find a skill already in the database. If the skill does not appear in the drop-down, click on the plus sign + to add it to the inventory.



Type the description of the new skill in the Skill Type field and click on the Save button. The Add New Client Work Experience Skill Types form reappears. Search again and the new item type appears in the list. Click the item to select it.

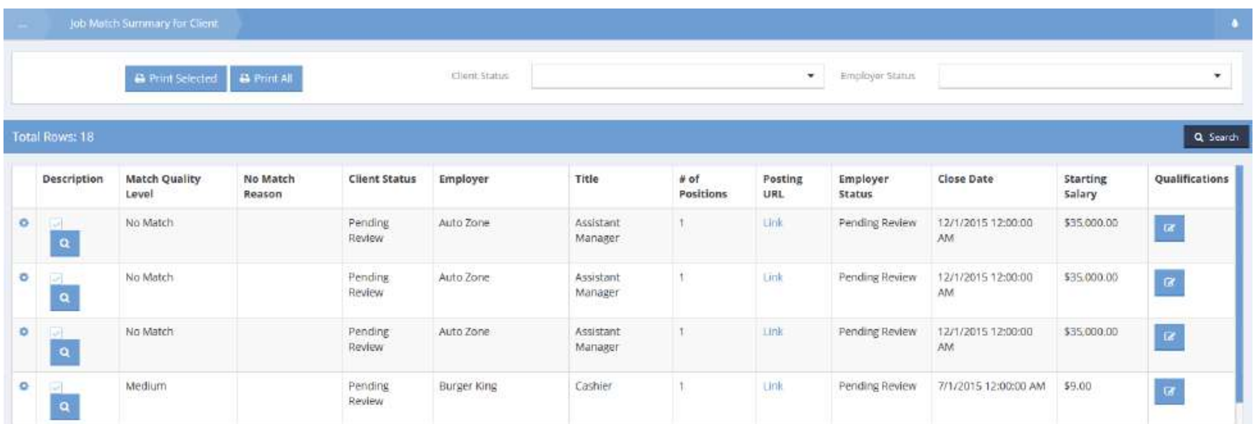
Click on the Save button.

Job Matches



Click on the "Job Matches" icon on the Job Qualification menu. The Job Match Summary for Client form displays a list of job openings relevant to the client's data.

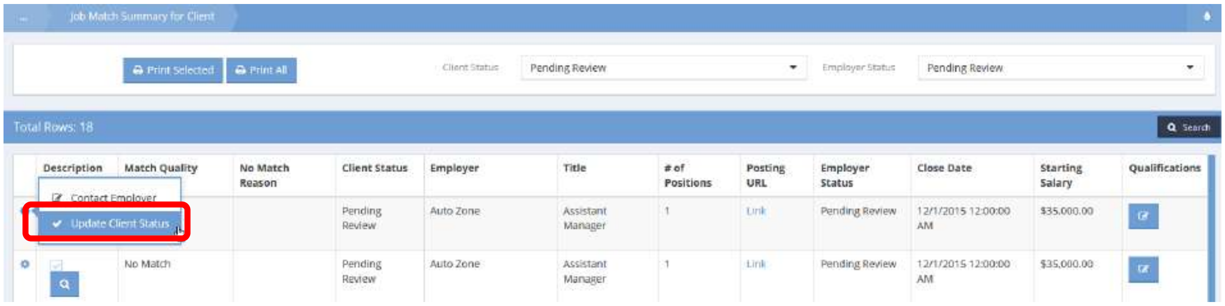
Job Match Summary for Client



Description	Match Quality Level	No Match Reason	Client Status	Employer	Title	# of Positions	Posting URL	Employer Status	Close Date	Starting Salary	Qualifications
	No Match		Pending Review	Auto Zone	Assistant Manager	1	Link	Pending Review	12/1/2015 12:00:00 AM	$35,000.00	
	No Match		Pending Review	Auto Zone	Assistant Manager	1	Link	Pending Review	12/1/2015 12:00:00 AM	$35,000.00	
	No Match		Pending Review	Auto Zone	Assistant Manager	1	Link	Pending Review	12/1/2015 12:00:00 AM	$35,000.00	
	Medium		Pending Review	Burger King	Cashier	1	Link	Pending Review	7/1/2015 12:00:00 AM	$9.00	

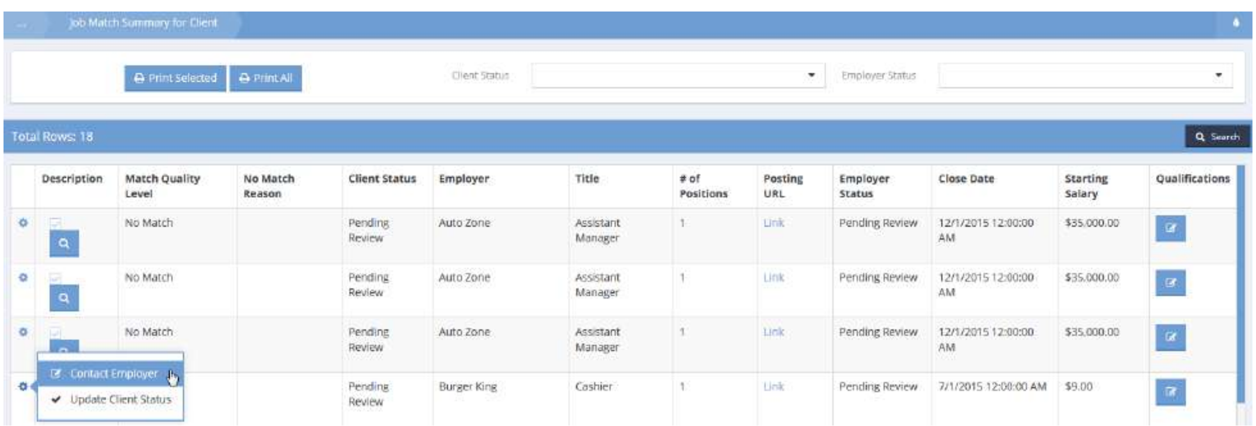
The list is filterable by status, both client and employer. If desired, filter the list results. To update the client status, click on the action gear icon associated with the desired job opening. Select Update Client Status from the pop up menu that appears.

The Update Client Status – Job Match Edit form displays.



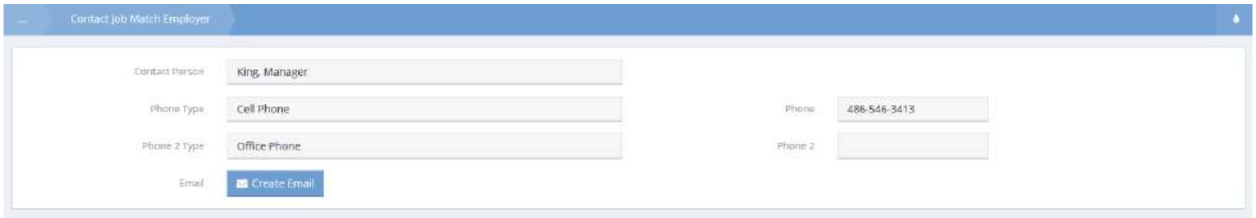
Update Client Status - Job Match Edit

Click on the down arrow icon for Client Status and select the desired status from the drop-down list and click on the Save button.



To contact the employer regarding the client's interest in the position, click on the action gear icon and select Contact Employer. The Contact Job Match Employer form displays.

Contact Job Match Employer



If the information is correct, click on the Create Email button and complete the email. The Job Match Summary for Client form reappears.

To view the job opening qualifications, click on the associated icon. The Qualifications form appears.

Job Order Qualifications Summary

To see the job opening summary, click on the associated magnifying glass icon. The Preview form displays.

Job Opening Preview

Preview

Employer Information

Employer: Auto Zone

Contact Person: man, super

Contact Phone: Cell Phone: 903-858-5394, Office Phone:

Contact Email:

Employer Website: www.autozone.com

Position Information

Title: Assistant Manager

Number of Open Positions: 1

Job Posting URL: autozone.com

Will Interview: Yes

Public Transporation Accessible: True

Description:

Looking for motivated individual with 1+ years experience in auto parts retail.

Qualifications

Drug Screen Required: True

Compensation

Position Type: Male

Beginning Pay: Salary - $35000.0000

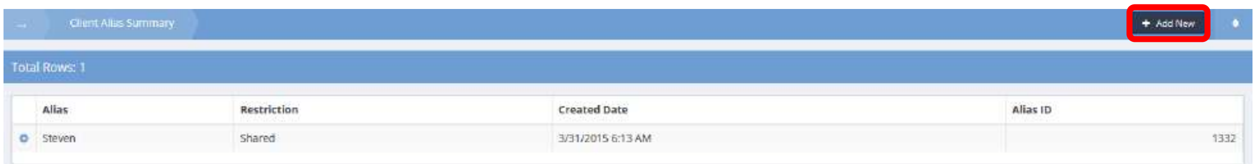
Probation Period: 90

Vacation Days: 10

Days Holiday: 6

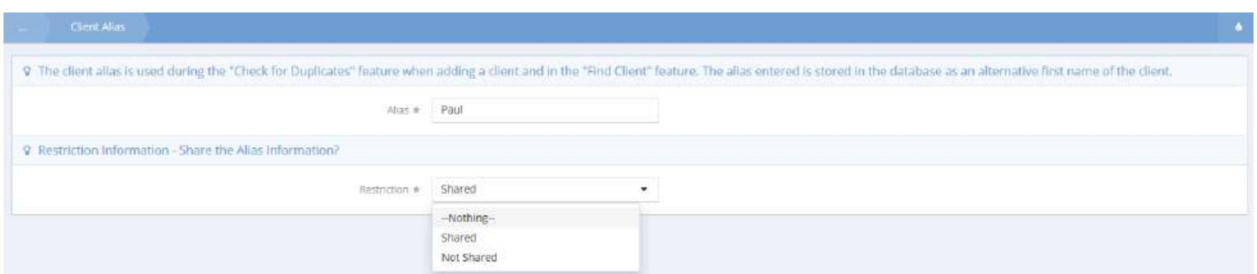
Client Alias

Objective: Add or view client aliases used in client searches.

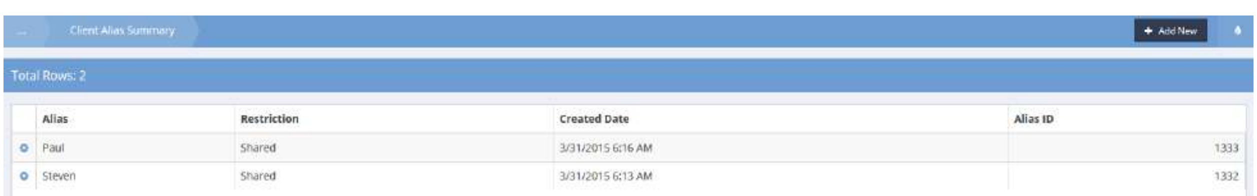


From the Client Alias Summary form, click on the Add New button. The Client Alias form displays.

Enter the alias for the current client, select a restriction value from the drop-down menu and click on the Save button.

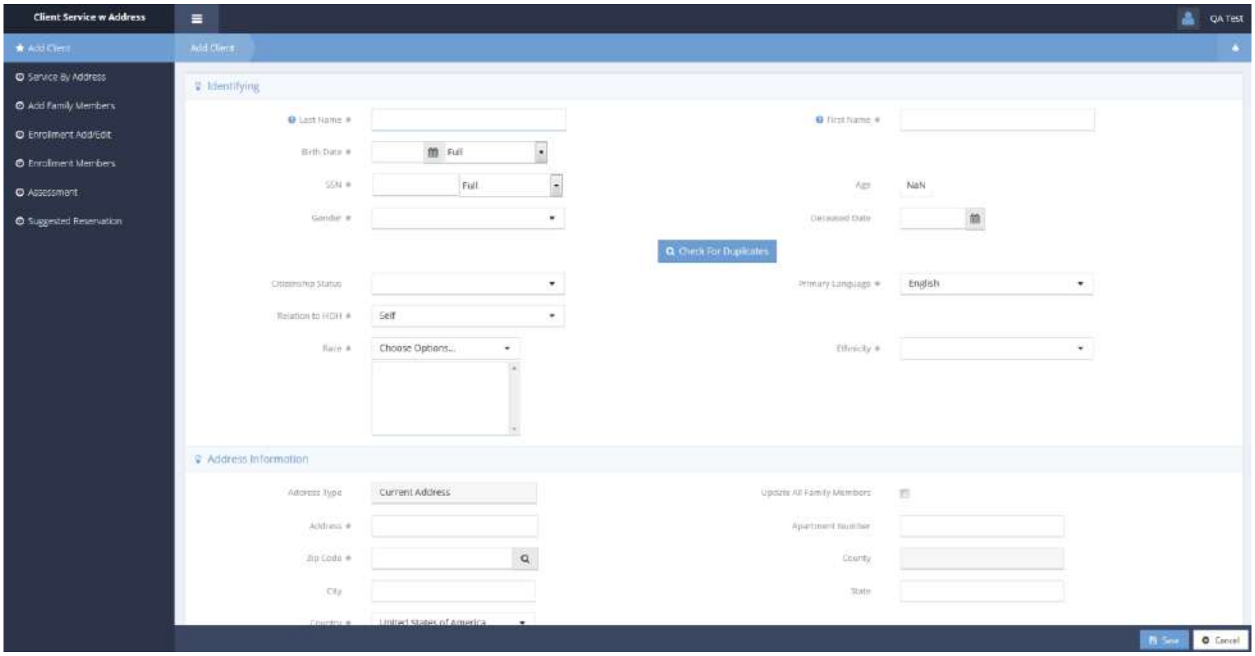


The Alias information now appears on the Client Alias Summary form.



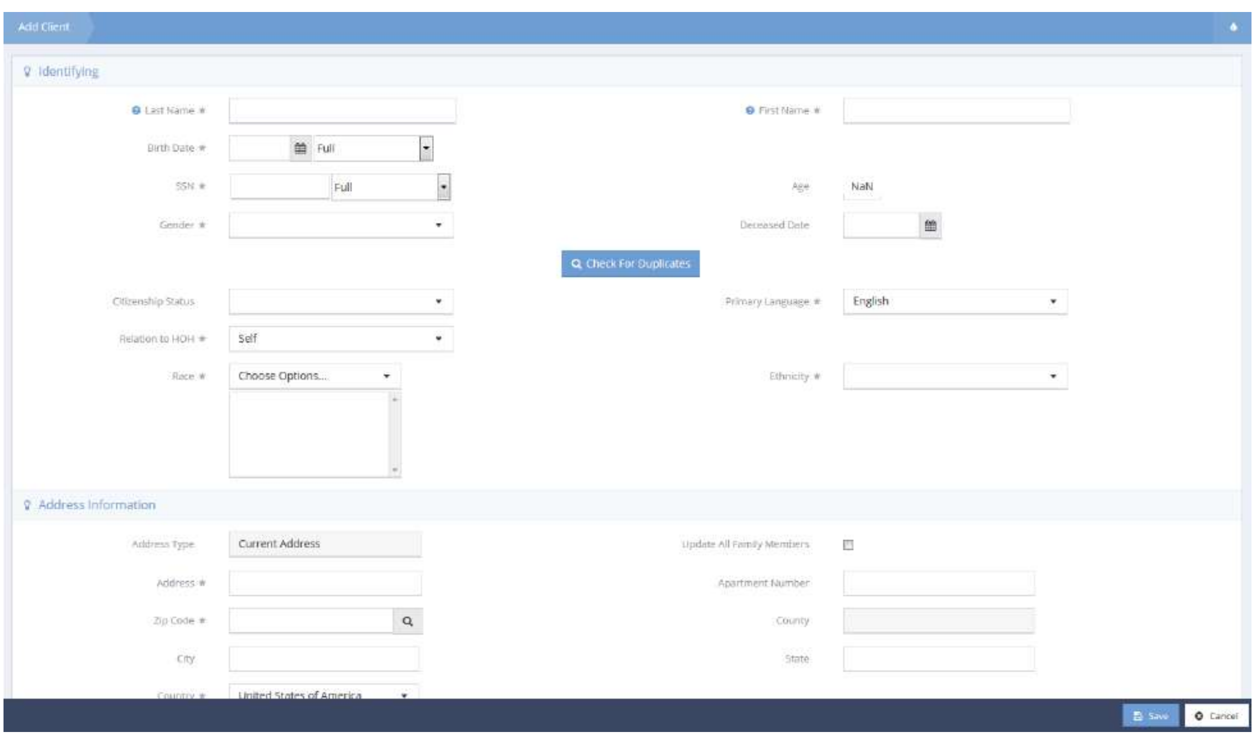
Find Service by Client Latitude and Longitude

Clicking Find Service by Client Latitude and Longitude opens the Client Service w Address workflow.

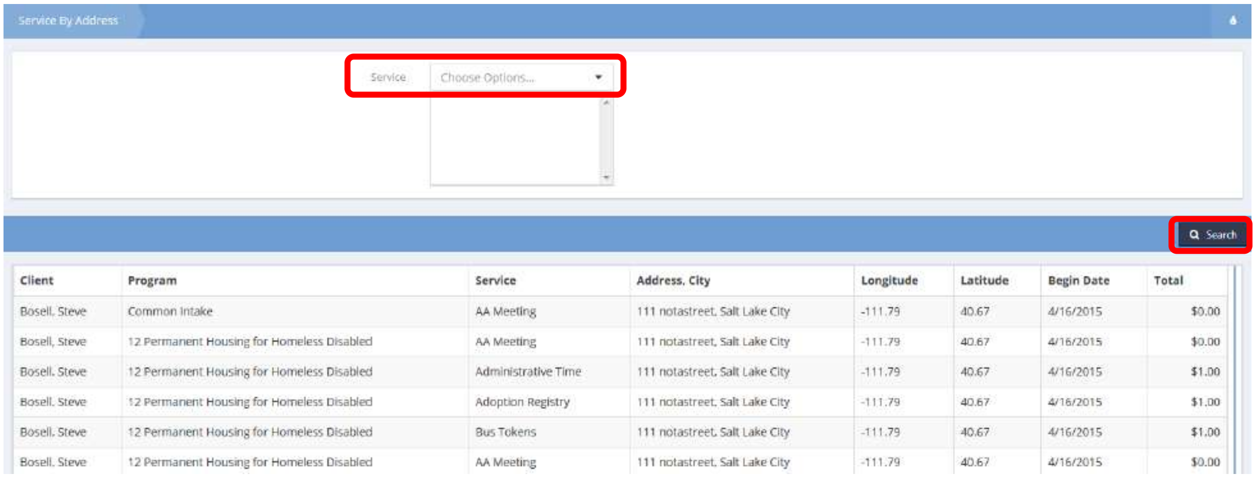


The first step of the workflow is the Add Client form.

Enter all required info and click Save to proceed to the next step.

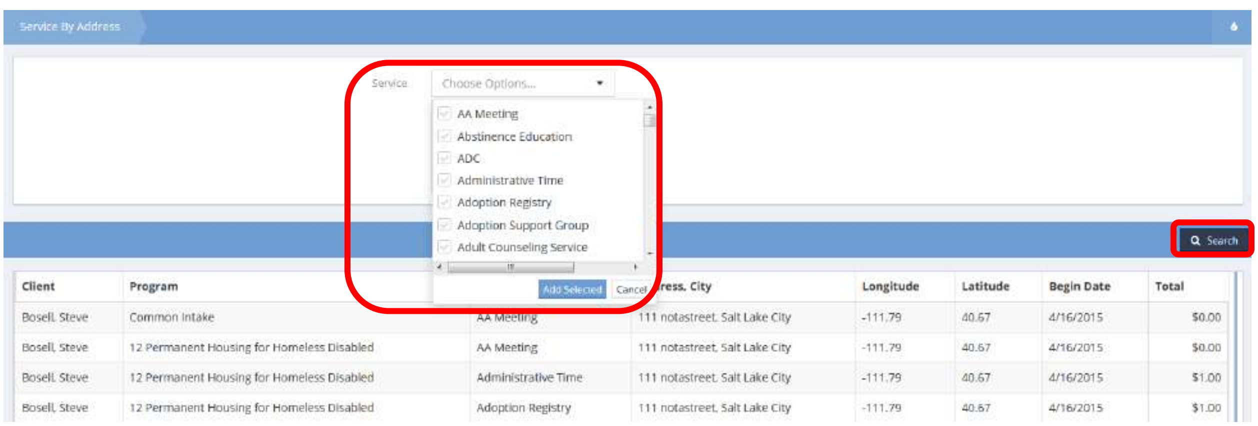


The next step of the workflow is the Service By Address form.

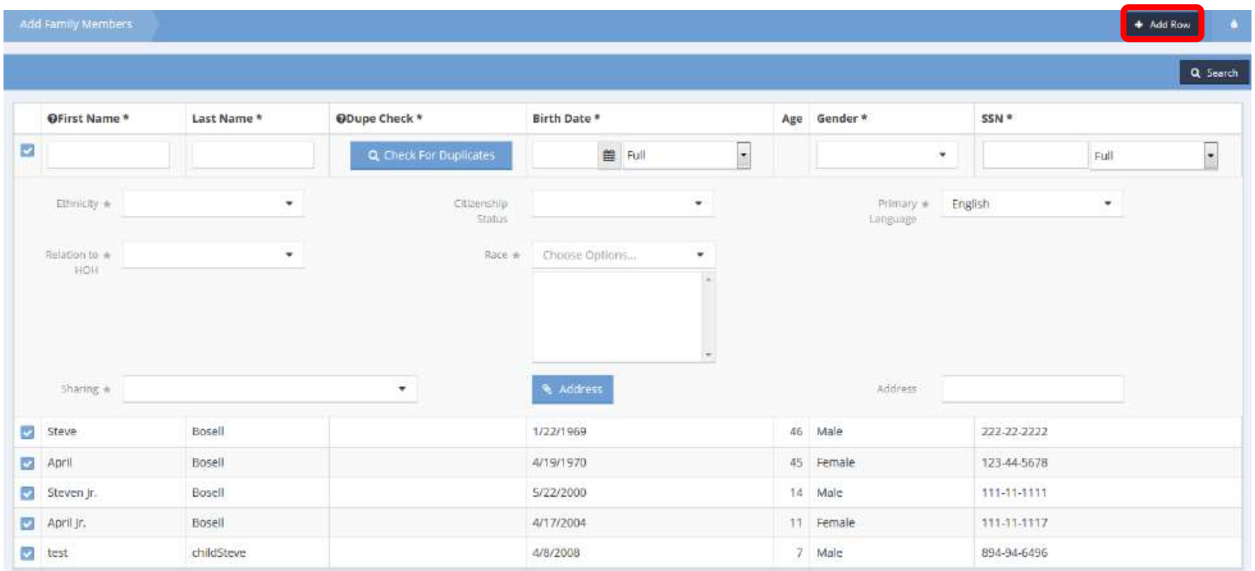


Use the Service drop-down list to select service types and click **Search** to filter services displayed.

Click **Done** when finished viewing services.

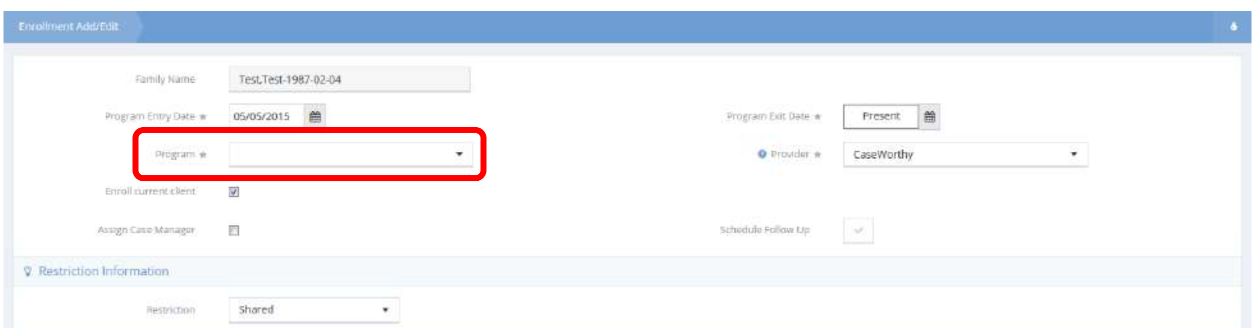


In the next step of the workflow, family members can be added. Click the Add Row button, enter all required info, and click Save when finished.

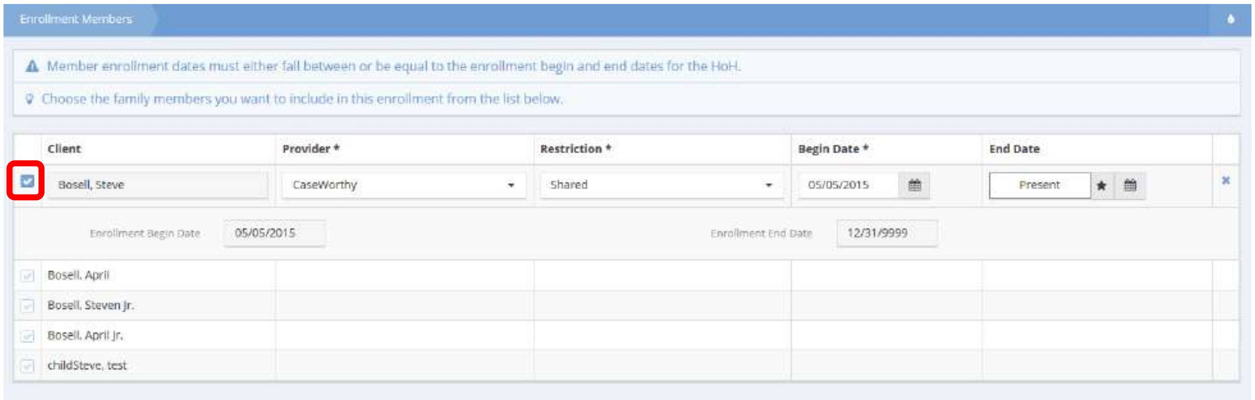


The Enrollment Add/Edit form displays next.

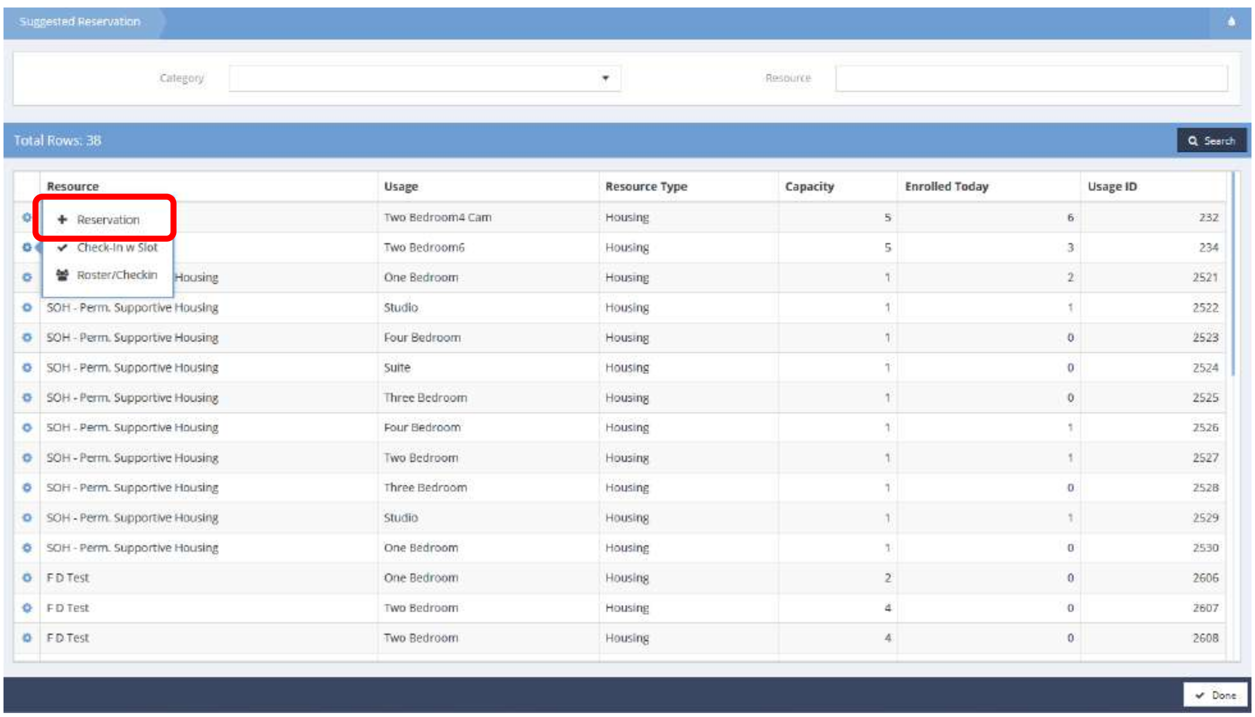
Use the Program drop-down list and click Save to add an enrollment.



After adding an enrollment, the Enrollment Members form displays. Click the checkbox to add a member. The field expands and the enrollment dates can be changed if desired. Click Save when finished.

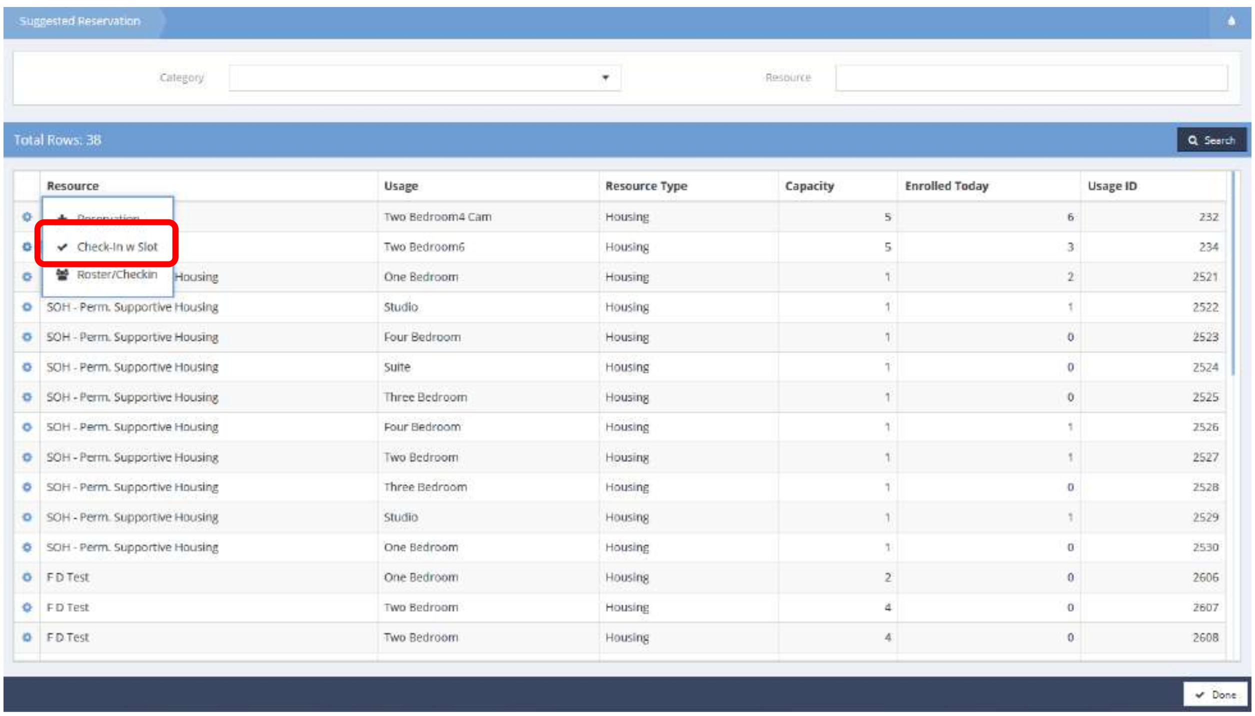


If an entry assessment is required for the selected enrollment, the relevant assessment displays. Upon completion, the Suggested Reservation form displays. Click the action gear and select Reservation.

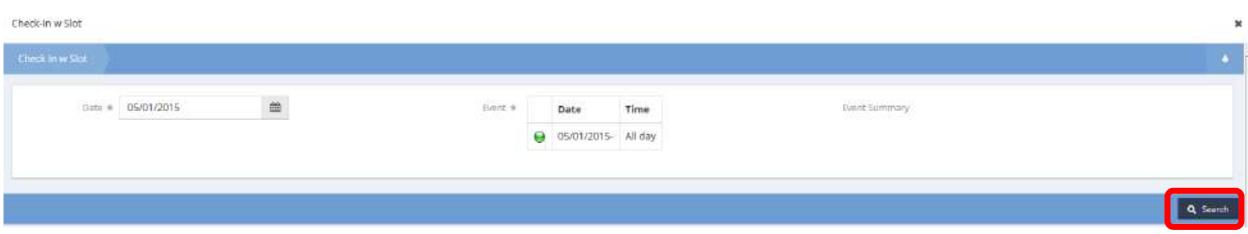


The Reservation form opens in a new window. To make a reservation, click the clear checkbox for the desired client and click the Save button.

To check in to the reservation, click the action gear and click Check-In w Slot.
The Check-In w Slot form displays.

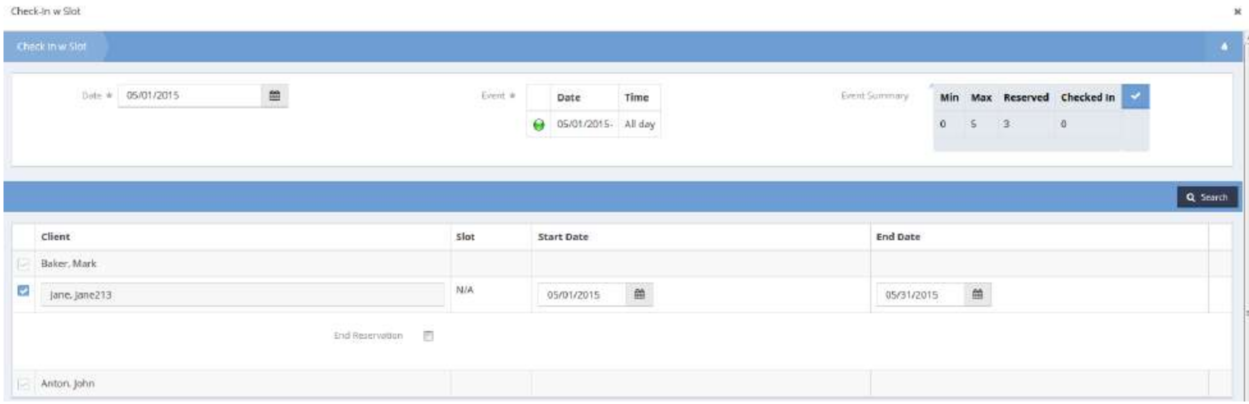


After selecting the date, click the Search button. Clients with reservations displays in the spreadsheet below.



To check a client in, click the clear checkbox, select a date range, and click the Save button.

The Check-in with Slot form displays.

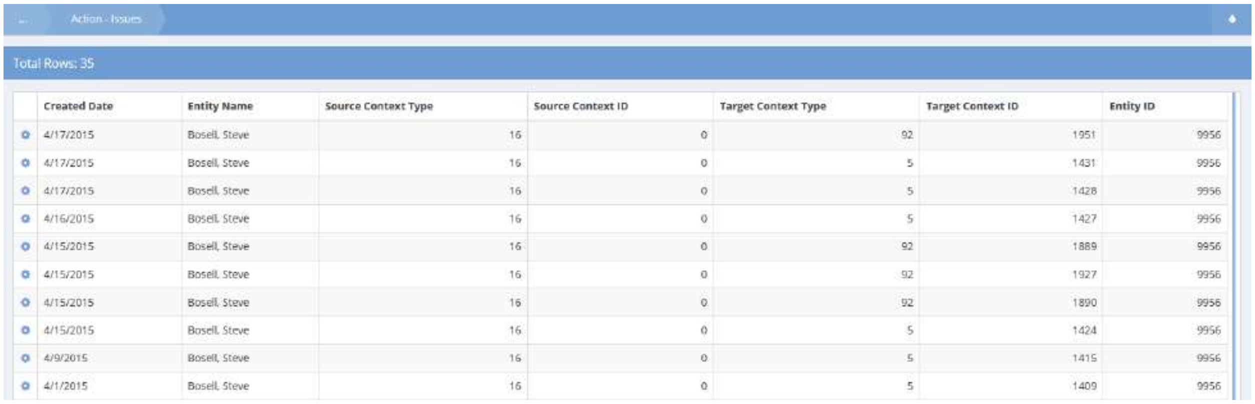


When finished with reservations, click the

button.

Actions Taken

Here a list of actions relevant to the current client is displayed.

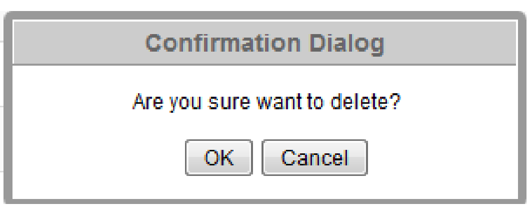


Created Date	Entity Name	Source Context Type	Source Context ID	Target Context Type	Target Context ID	Entity ID
4/17/2015	Bosell, Steve	16	0	92	1951	9956
4/17/2015	Bosell, Steve	16	0	5	1431	9956
4/17/2015	Bosell, Steve	16	0	5	1428	9956
4/16/2015	Bosell, Steve	16	0	5	1427	9956
4/15/2015	Bosell, Steve	16	0	92	1889	9956
4/15/2015	Bosell, Steve	16	0	92	1927	9956
4/15/2015	Bosell, Steve	16	0	92	1890	9956
4/15/2015	Bosell, Steve	16	0	5	1424	9956
4/9/2015	Bosell, Steve	16	0	5	1415	9956
4/1/2015	Bosell, Steve	16	0	5	1409	9956

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

Created Date	Entity Name	Source Context Type	Source Context ID	Target Context Type	Target Context ID	Entity ID
4/17/2015	Bosell, Steve	16	0	92	1951	9956
4/17/2015	Bosell, Steve	16	0	5	1431	9956
Delete	Bosell, Steve	16	0	5	1428	9956
4/16/2015	Bosell, Steve	16	0	5	1427	9956
4/15/2015	Bosell, Steve	16	0	92	1889	9956
4/15/2015	Bosell, Steve	16	0	92	1927	9956

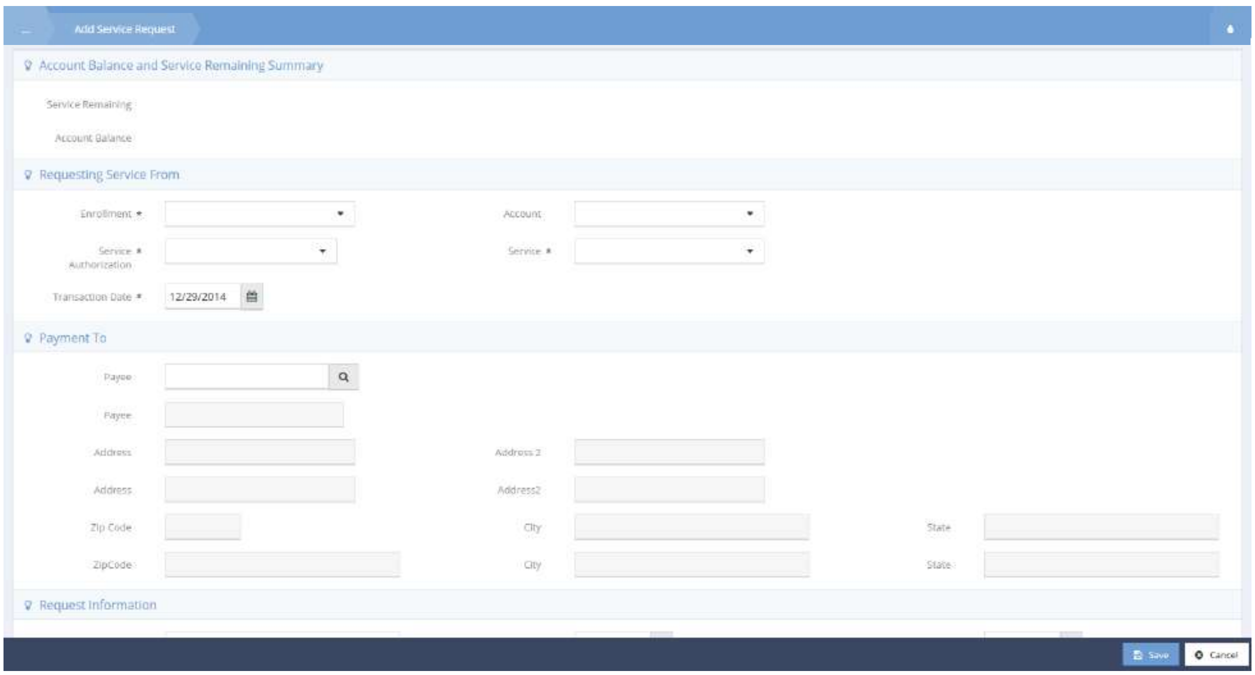
Click OK to confirm. The action is now deleted.



Authorization Service Request Summary

Objective: Create a new service request.

To add a service request from the Service Request Summary form, click the **Add Service** button. The Add Authorization Service Request form displays.



Fill out all necessary fields and click **Save** when finished.

Name History

Objective: View all name changes that have been recorded for a client

Navigation: Case Management>Case Management>Name History

The Name History form displays.

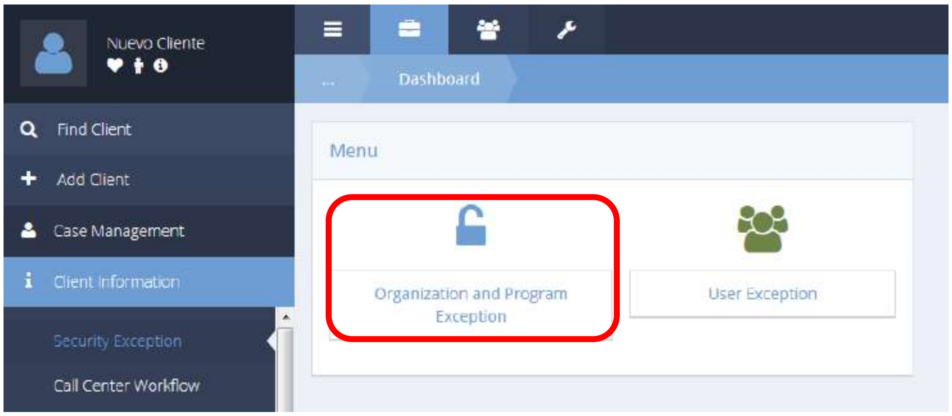
First Name	Last Name	Begin Date	End Date
tyler	tyler	3/23/2017	3/23/2017
tester	tyler	3/23/2017	3/23/2017
tyler	tyler	3/1/2017	3/23/2017

This is a view only form. (Name changes are recorded on the Add Client Demographics form.)

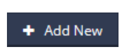
Client Information

Security Exception

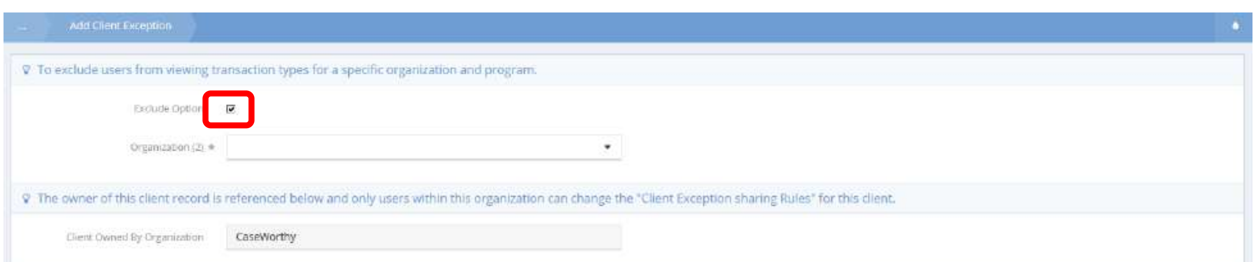
Objective: Control how client information is shared across organizations.



Click the icon for Organization and Program Exception. The Client Exception Summary displays.

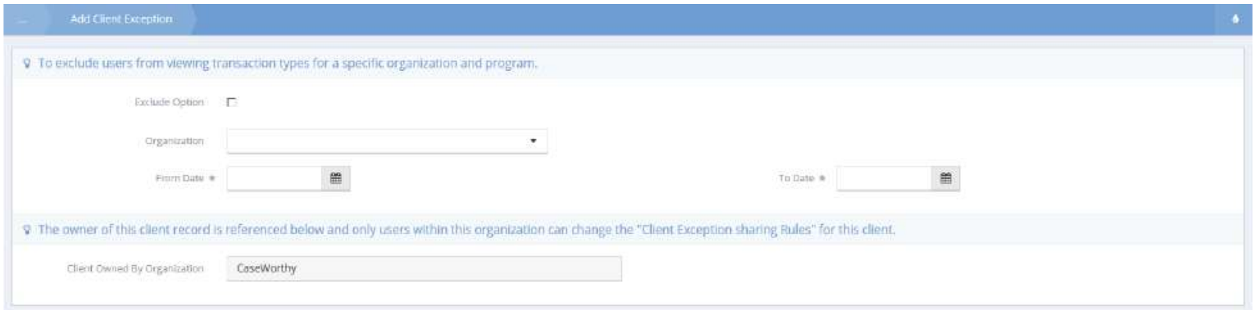
To add a new security exception, click on the 

button. The Add Client Exception form displays.

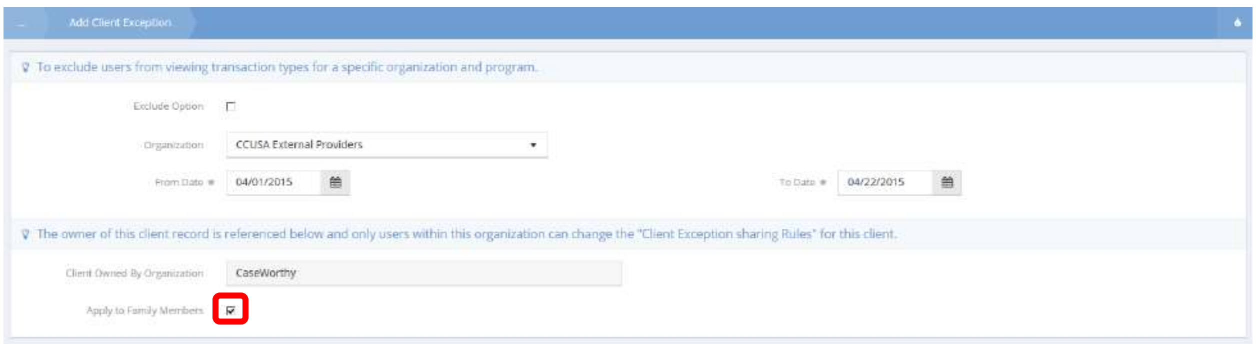


Uncheck the checkbox for Exclude Option…

...date range fields appear.



Enter the desired range of dates for the exception and select an organization from the drop-down list.

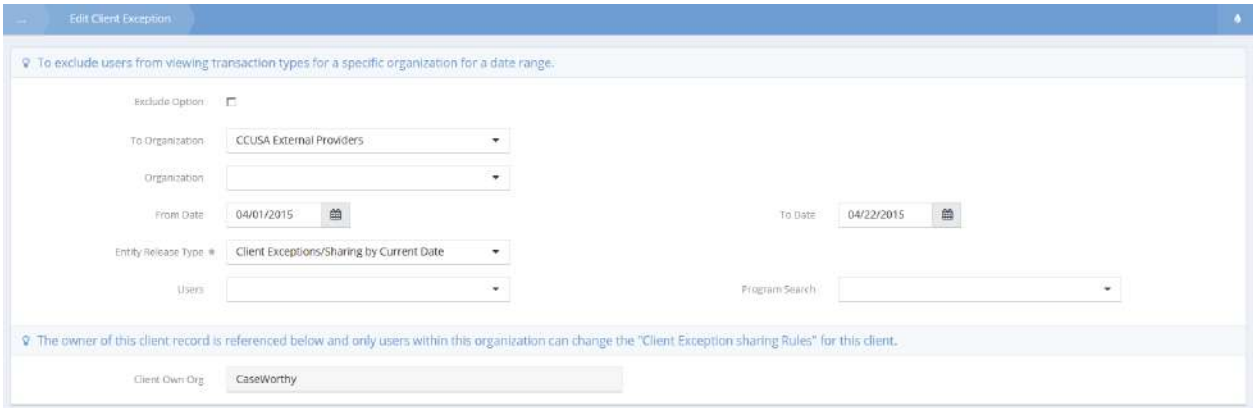


Click the checkbox for Apply to Family Members.

To edit an existing security exception, click on the action gear for the exception and select Edit from the pop-up menu.

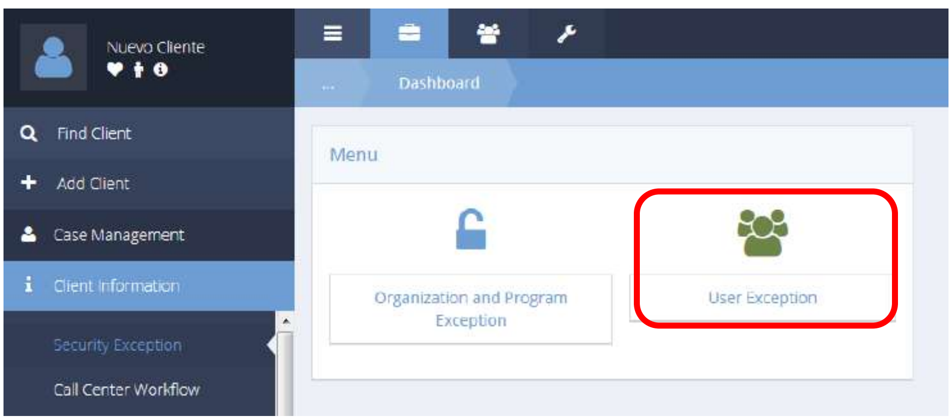
The Edit Client Exceptions form displays.

Make any required changes and click on the Save button.



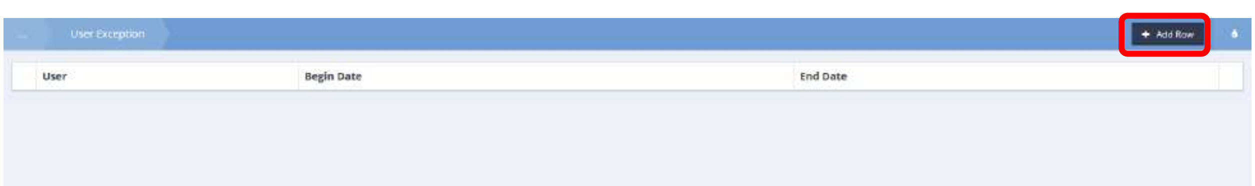
User Exception

Objective: Create a security exception for a user for a specified period of time.

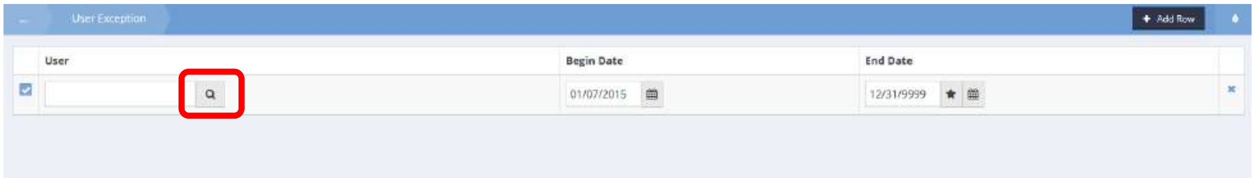


Click the User Exception icon. The User Exception form displays.

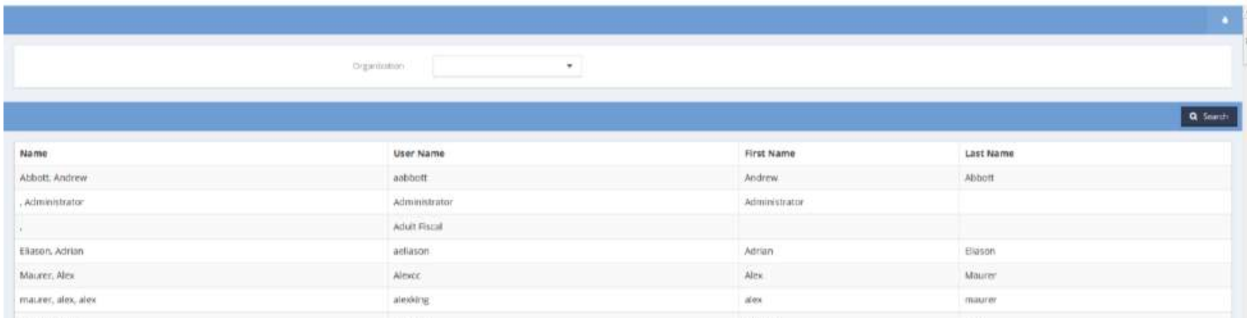
Click + Add Row to create a new exception.



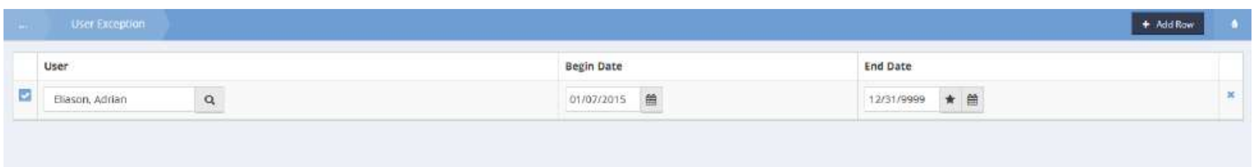
Specify a begin date and end date and click the magnifying glass icon to select a user from a list.



The Select User form displays in a new window.



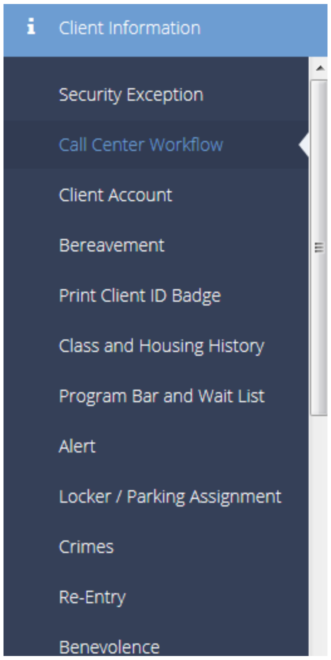
Select the desired User by clicking on the row. The User Exception form displays again with the user.



Click Save when finished.

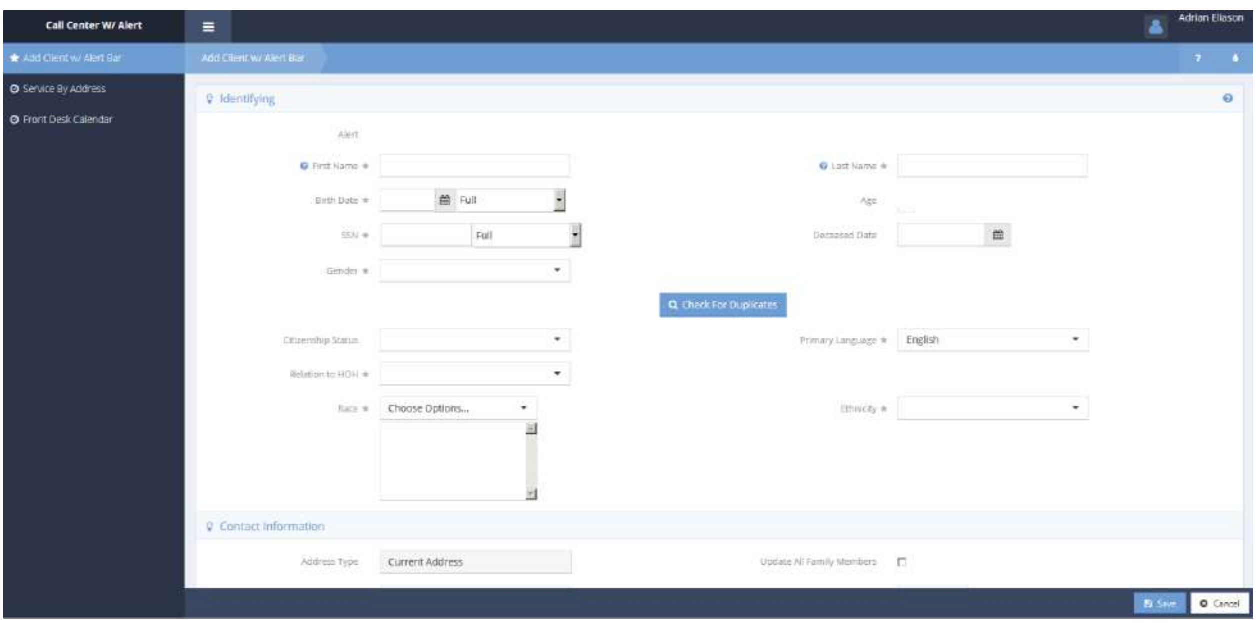
Call Center Workflow

Objective: Process call center requests through to appointment setting.

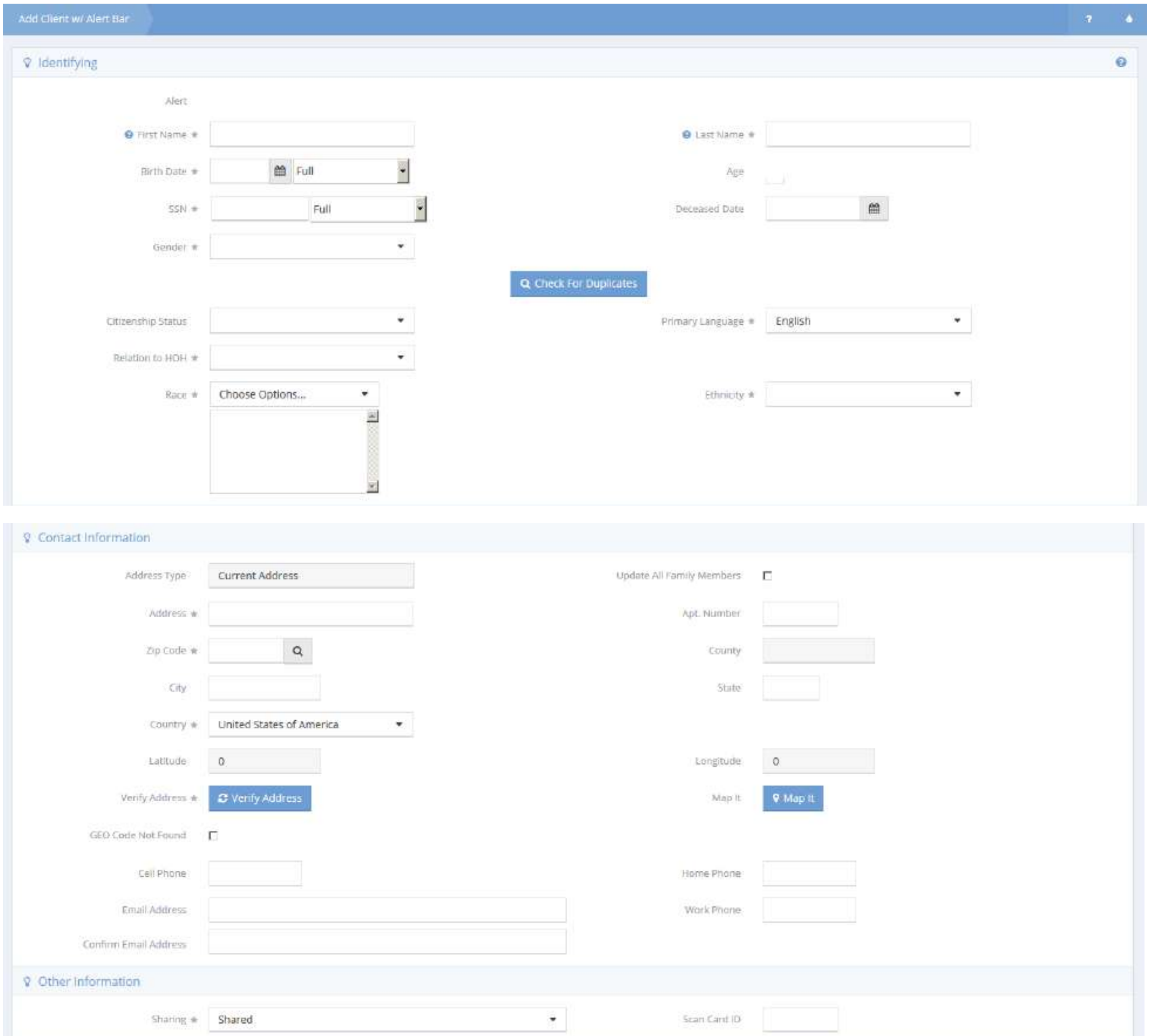


Select Call Center Workflow from the Case Management menu.

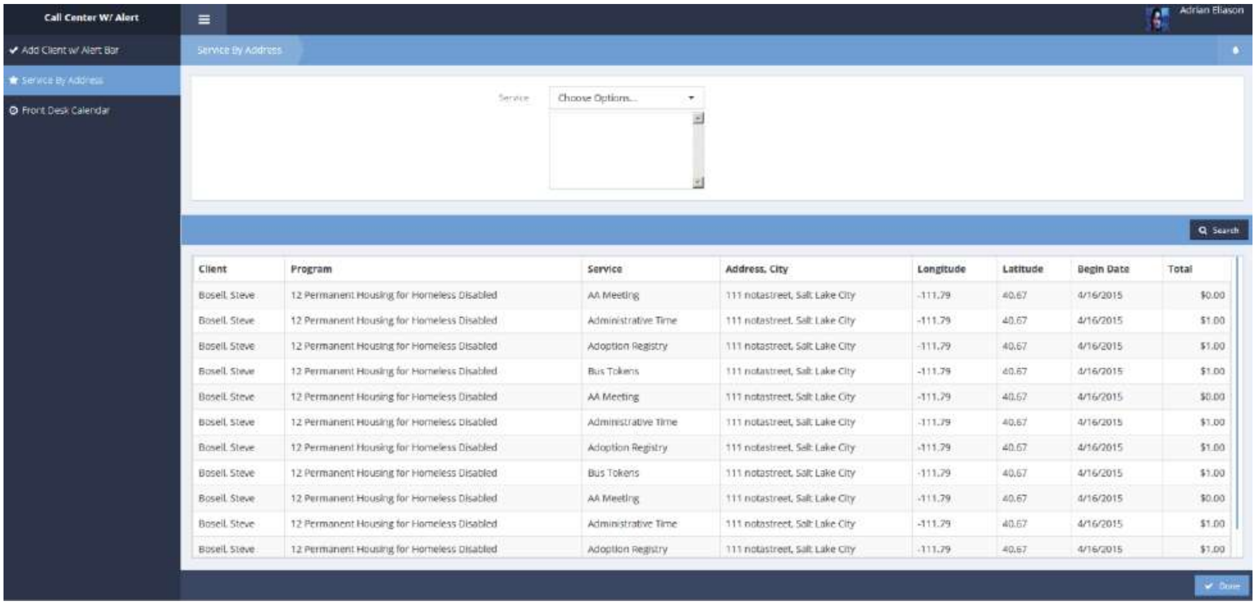
The first form of the workflow, Add Client w/ Alert Bar appears.



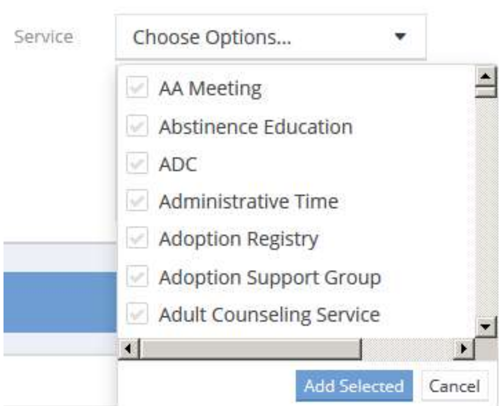
Enter enough of the Identifying and Contact Information to return the desired client when the Check For Duplicates button is clicked. Make any changes required and click on the Save button.



The next step in the workflow, the Service by Address form, displays.



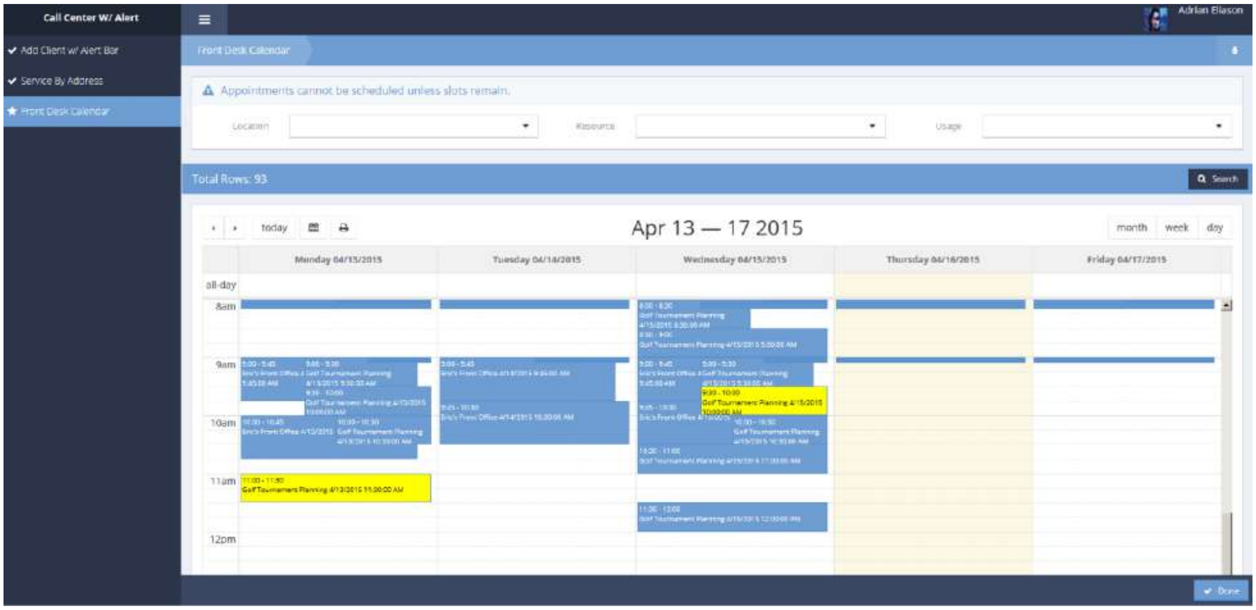
If the list of services for this client is unmanageable, filter the results by selecting desired services from the drop-down list at the top of the form.



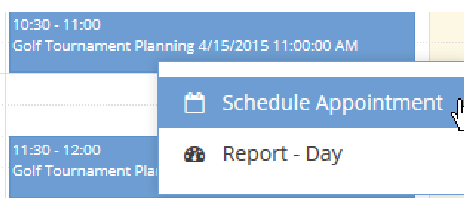
After the services have been reviewed, click on the 

button.

The Front Desk Calendar form displays.

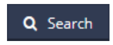


Appointments in red are fully booked, yellow appointments have only one slot left and blue appointments have multiple slots available. To schedule an appointment, select the desired appointment and click on it. A pop-up menu appears.

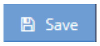


Select Schedule Appointment. The Schedule Appointment form displays.

Click on the magnifying glass  icon to select the participant. The Participant Lookup form appears.

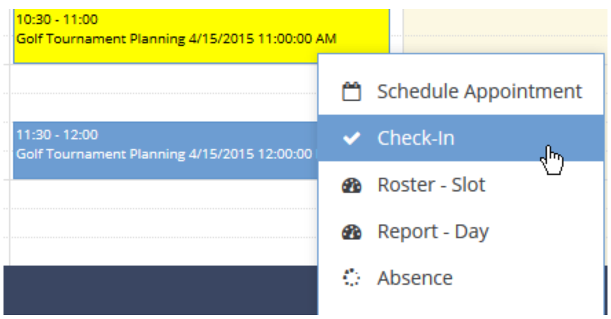
Enter as much of the name as desired and click on the 

button.

Select the client from the provided list. Make any alterations to the default start and end dates and click on the 

button.

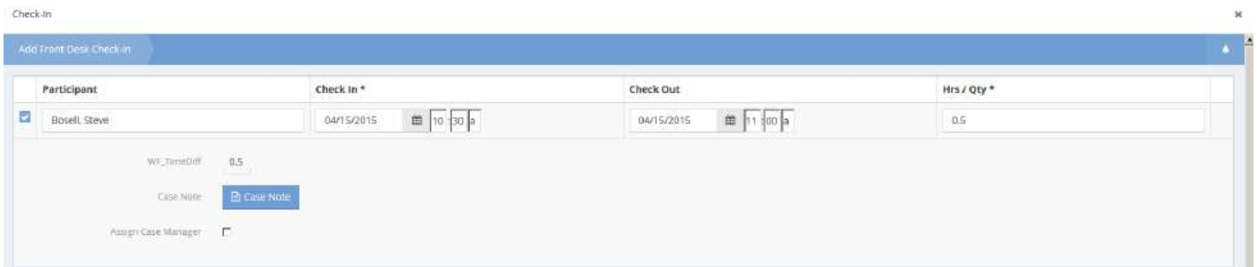
To check-in a client from this calendar, click on the appointment and select Check-In from the pop-up menu.



The Check-In form displays.

Click on the clear checkbox next to the client's name.

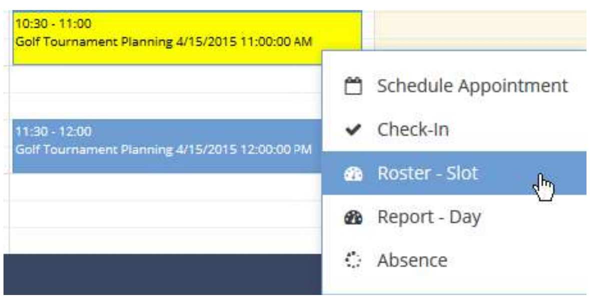
The row expands.



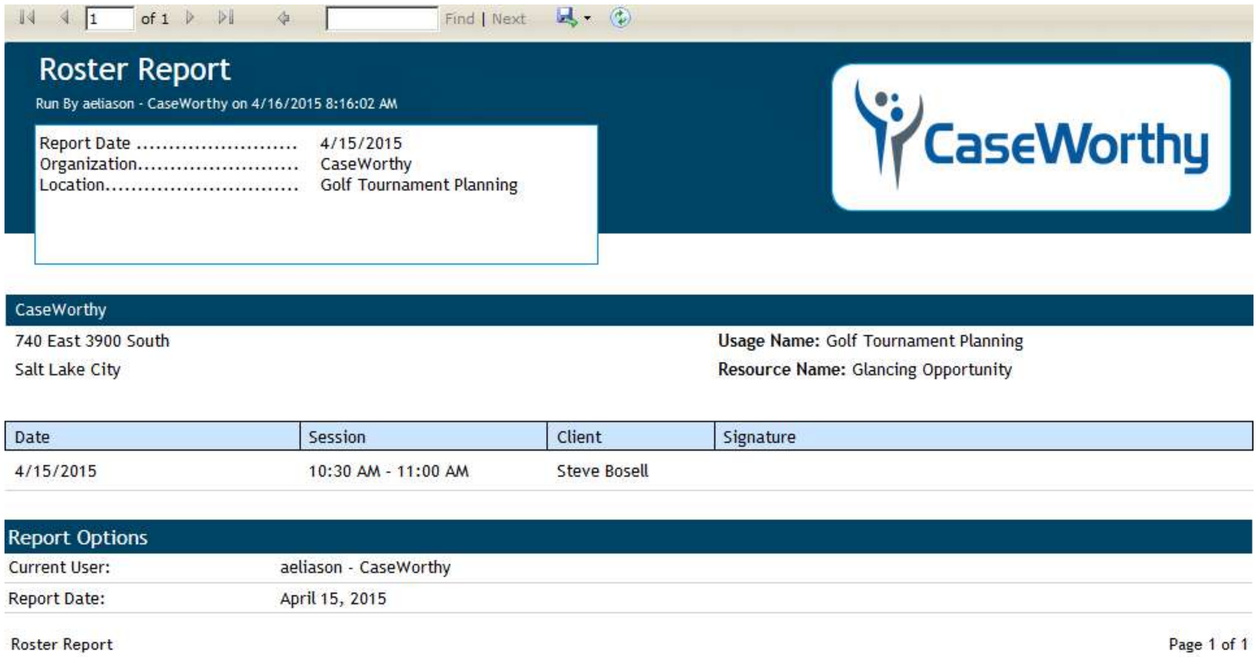
Click on the 

button.

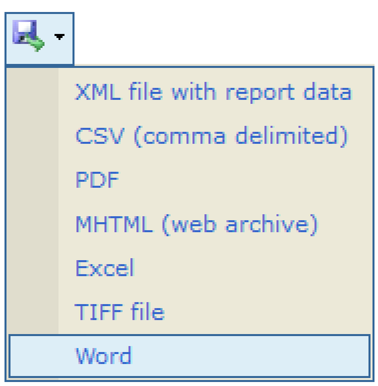
To see a roster for an appointment, click on the appointment and select Roster-Slot from the pop-up menu.



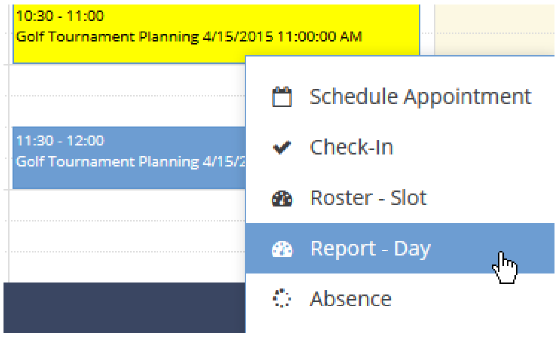
The report opens in a separate window.

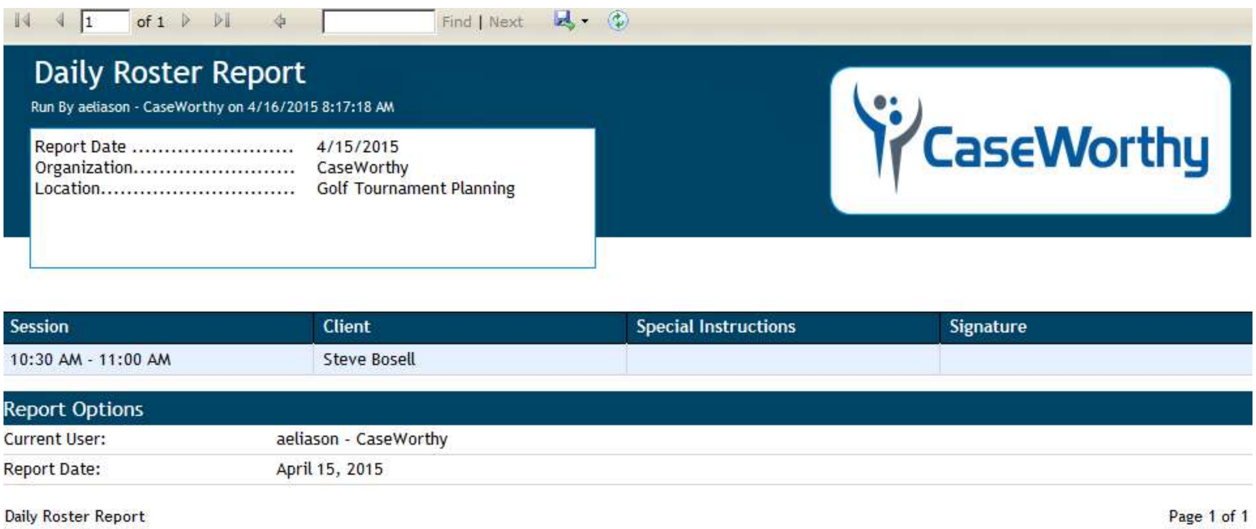


The report can be exported by clicking on the icon near the center of the header bar of the form and selecting a format.

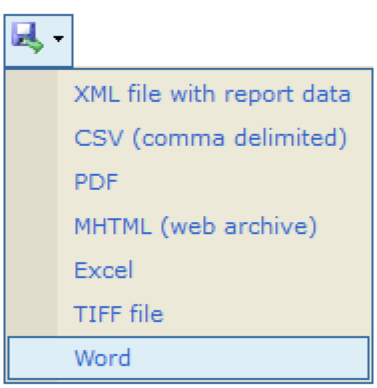


To view a daily roster report, select Report-Day from the pop-up menu when clicking on an appointment.

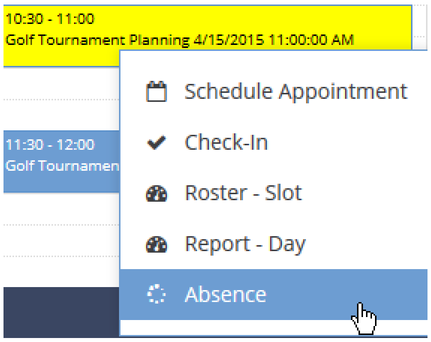




The report can be exported by clicking on the icon near the center of the header bar of the form and selecting a format.



To record an absence, select Absence from the pop-up menu.

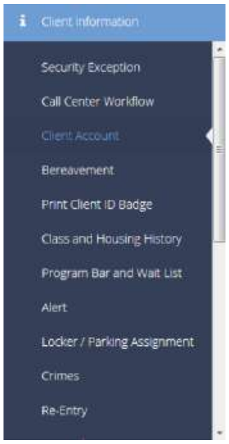


The Absence form displays a list of attendees.

Click on the clear checkbox next to the desired name. The row expands.

Enter the absence reason and type. Add any notes desired. Click on the Save button. The Workflow is now complete.

Client Account



Accounts

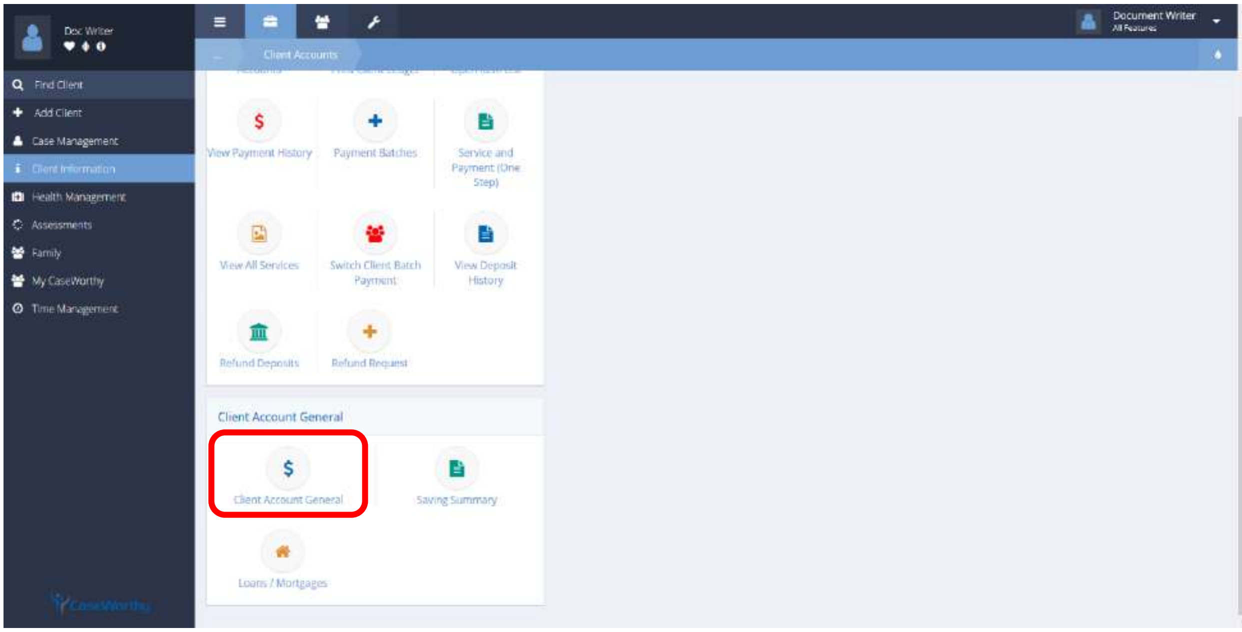
Objective: The Client Account Input form allows the addition of new financial accounts for the client and the Client Account Edit form provides the ability to edit the account information.

Client Account

Client General Account

Objective: Manage and view client account information.

Navigation: Case Management>Client Information>Client Account

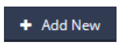


Select Client Account General from the Client Account General portion of the Client Account dashboard.

The Client Account Summary form displays.

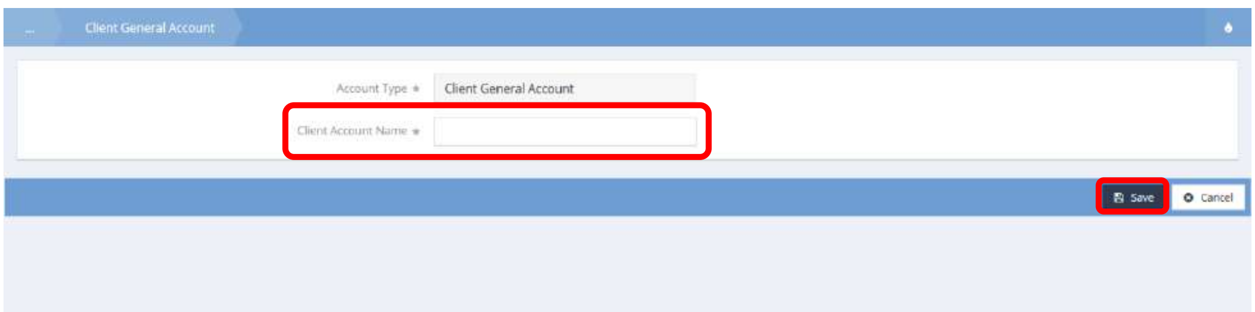
Client Account Name	Month / Year	Provider / Organization	Account Type	Original Loan	Current Balance	Account ID
Money		CaseWorthy	Client General Account	$0.00	$0.00	755
Savings Test		CaseWorthy	Client General Account	$0.00	$0.00	756
Checking Test		CaseWorthy	Client General Account	$0.00	$0.00	757

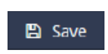
Existing accounts automatically display. Click the action gear  icon associated with the desired account to view Summary Balances, Services and Payments, Print Client Ledger, View Transactions, and View Payments forms.

To add a new account, select the 

button.

The Client General Account form displays.

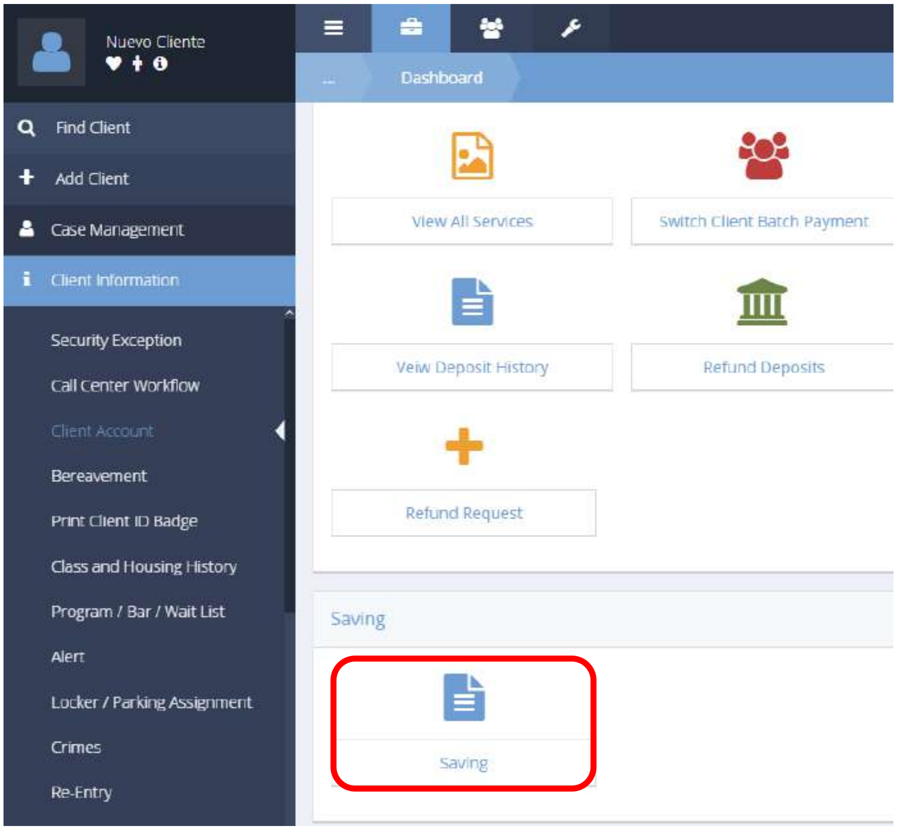


Select an Account Type and enter Client Account Name. Click the 

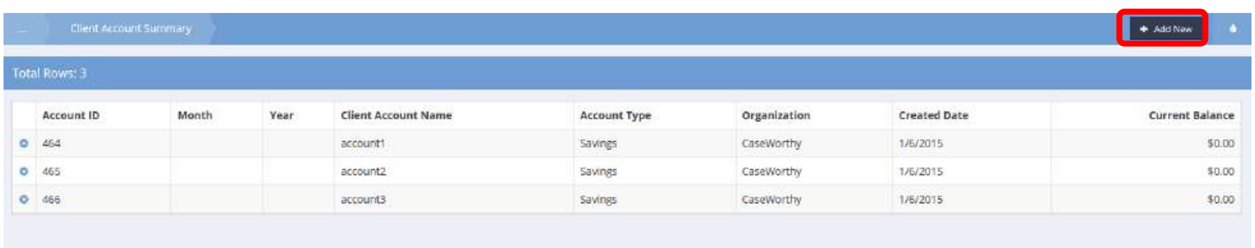
button to generate the new account and exit.

Client Account Saving Summary

Objective: View a summary of the client's savings accounts.



Click the Saving icon on the Client Account menu. The Client Account Summary form displays a list of the client's accounts.



Click **+ Add New** to create a new account.

The Client Account Input form displays.

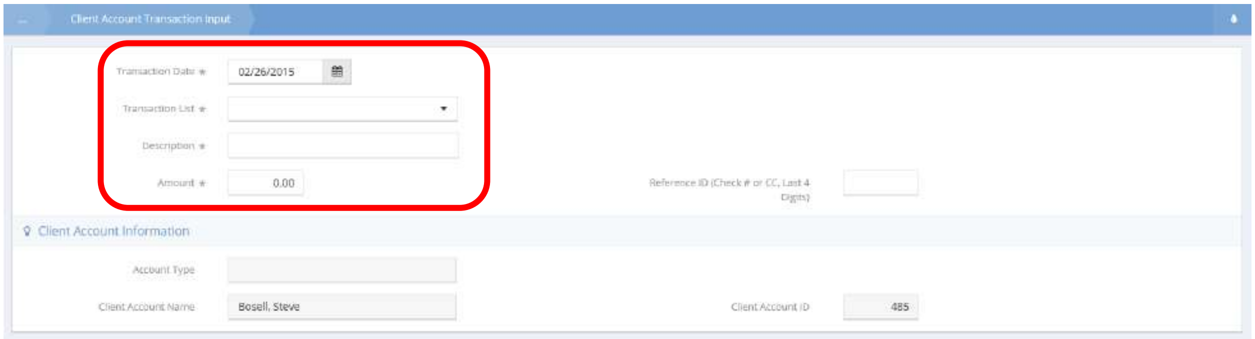
Simply enter an account name and click the Save button. The account has been created. The Client Account Summary form displays again with the new account in the list.

To enter transactions, click the action gear associated with the desired client account and select Summary Balances from the pop up menu that appears.

The Client Account Summary Balances form displays.

Click Add New to enter a new transaction.

The Client Account Transaction Input form displays.



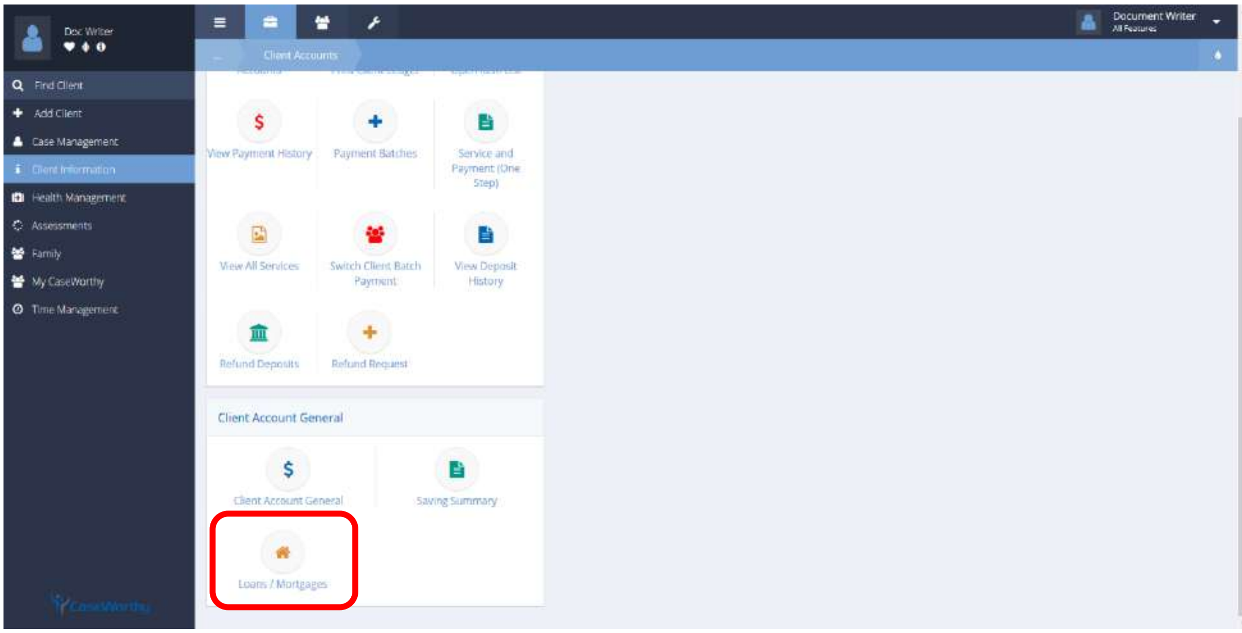
Enter a date, description, and amount. Select the type of transaction from the transaction drop-down list. Click Save when finished. The Client Account Summary Balances form displays again reflecting the new balance.

Client Account Name	Month	Year	Original Loan	Current Balance	Cash Match	Principle	Interest	Late Fees	Account ID
Bosell, Steve	2	2015	$0.00	$500.00	$0.00	$0.00	$0.00	$0.00	485

Loans and Mortgages

Objective: Manage, view, and print client loan and mortgage information.

Navigation: Case Management>Client Information>Client Account



Select Loans / Mortgages from the Client Account General portion of the Client Account dashboard.

The Client Account Summary form displays.


Client Account Summary
Add New
Total Rows: 5

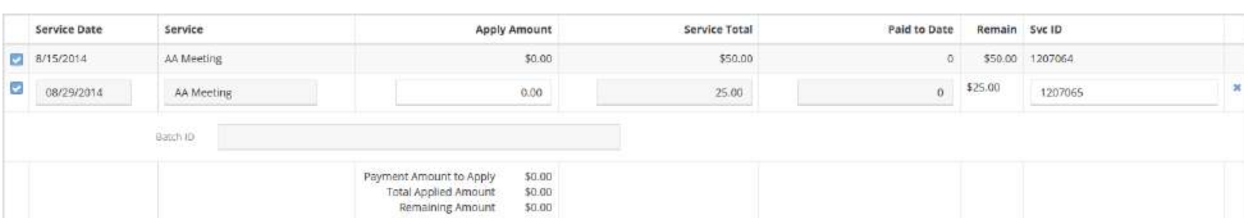
Client Account Name	Month / Year	Provider / Organization	Account Type	Original Loan	Current Balance	Account ID
Repayment Loan - No Intereest	8 / 2014	CaseWorthy	Mortgage Loan	$400.00	$400.00	362
Repayment Loan - No Intereest	7 / 2015	CaseWorthy	Mortgage Loan	$400.00	$365.00	362
Quick Loan to repay ???		CaseWorthy	Mortgage Loan	$0.00	$0.00	397
Short-Term Loan to pay for back taxes		CaseWorthy	Mortgage Loan	$0.00	$0.00	398
Loan to Pay off CC		CaseWorthy	Mortgage Loan	$0.00	$0.00	399

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

Select Services and Payments from the menu options.

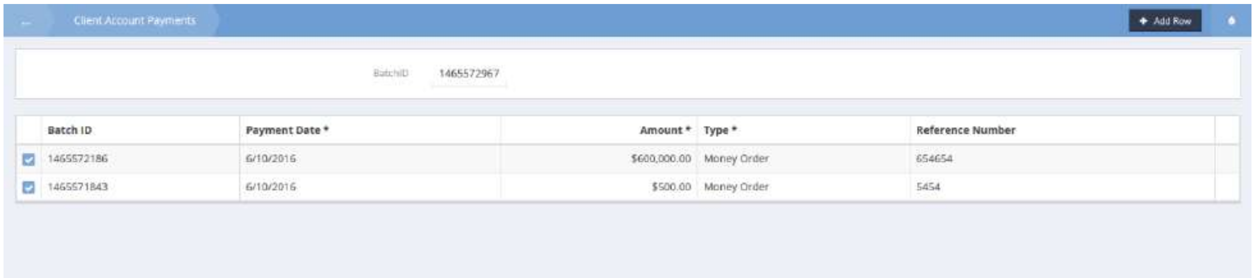
The Service Client Summary form displays.

Select a Batch ID and Remaining Balance from the drop-down menu to view specific account details associated with the selected batch. To edit an entry, click the blue checkbox  icon, the row expands for editing.



To view client payments, click on the $ Client Payments button.

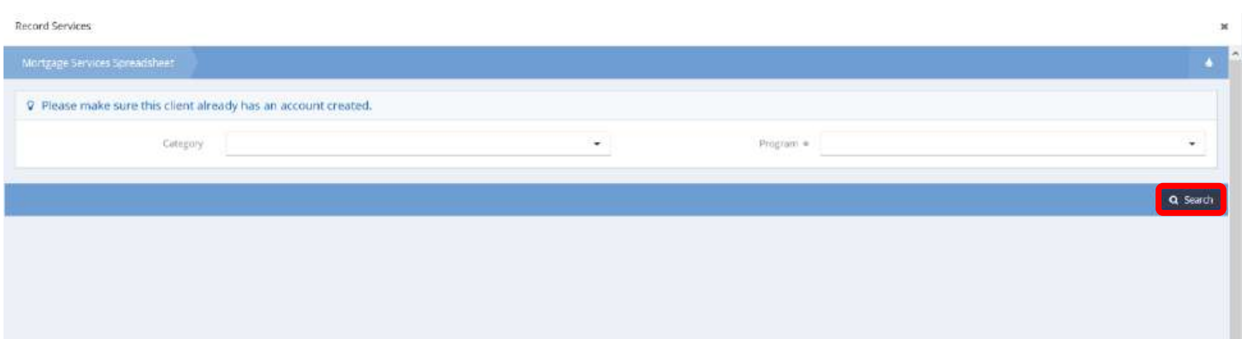
The Client Account Payments form displays.



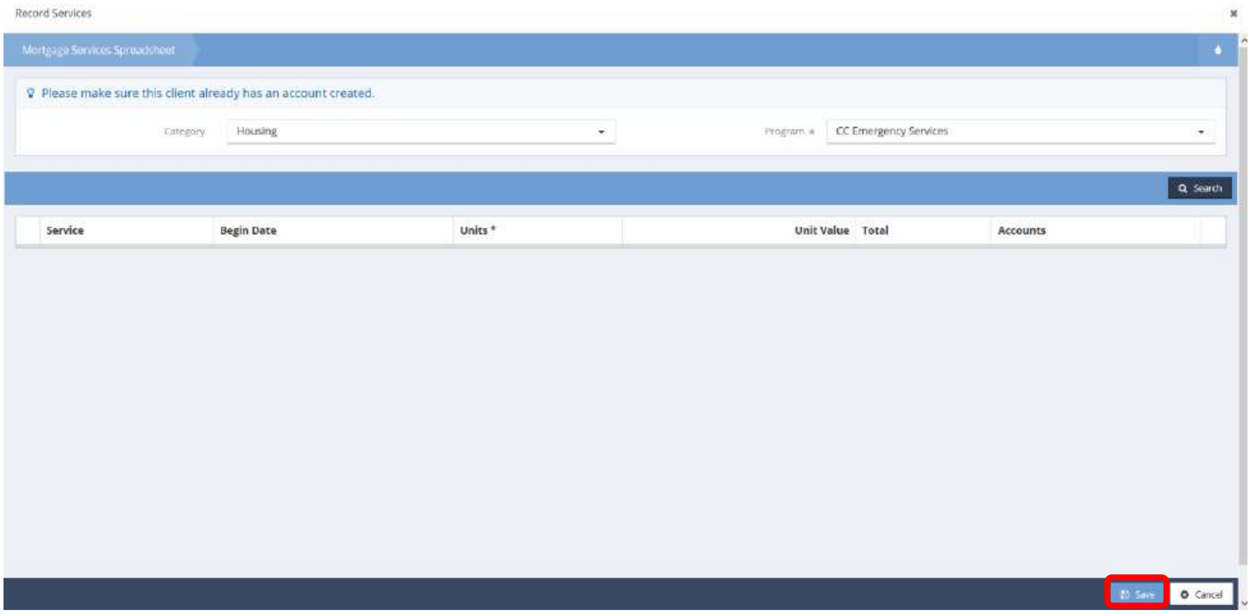
Existing payments display. To add a payment, click the Add Row button. A new row appears.

To edit existing payments, click the blue checkbox icon associated with the desired payment. The row expands for editing. Click the Save button to save and return to the Service Client Summary form.

To view a services spreadsheet, click on the Record Services button. The Mortgage Services Spreadsheet form displays in a new pop-up window.

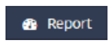


Select a category and program from the drop-down menus and click the Search button to populate results.



Click the Save button to save and return to the Client Account Summary form. To print an account ledger, click on the action gear icon associated with the desired client account and select Print Client Ledger from the menu options.

The Print Ledger form displays.

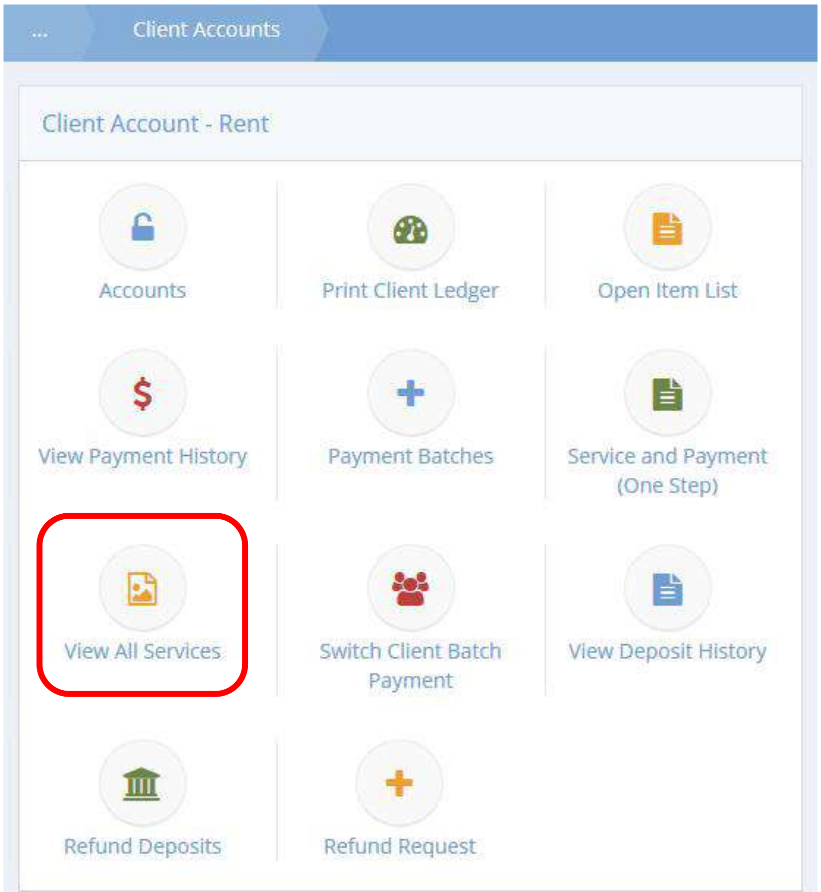
Enter a date range and click on the  button to generate a report (a new pop up window appears).

Select desired print/save options from the save  icon.

Diagnosis Codes by Service

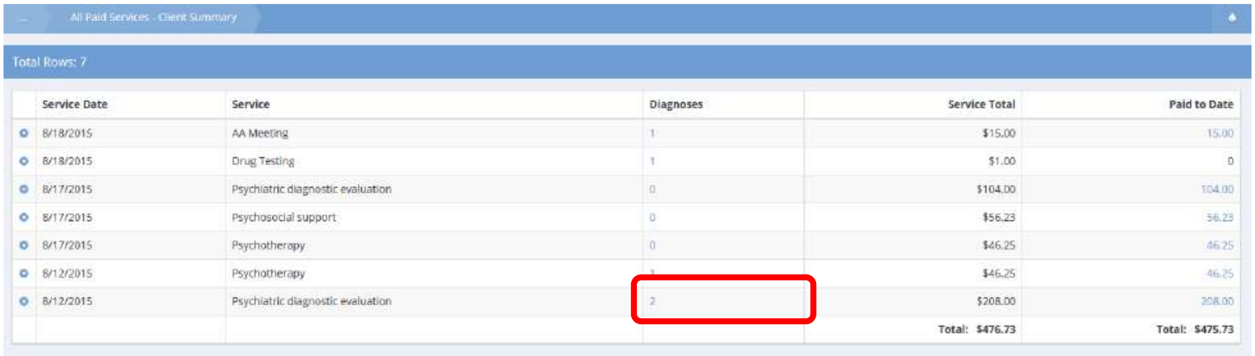
Objective: View diagnostic codes for client services.

Navigation: Case Management>Client Information>Client Accounts



Click the icon for View All Services.

The All Paid Services – Client Summary form displays.



All Paid Services - Client Summary

Total Rows: 7

Service Date	Service	Diagnoses	Service Total	Paid to Date
8/18/2015	AA Meeting	1	$15.00	15.00
8/18/2015	Drug Testing	1	$1.00	0
8/17/2015	Psychiatric diagnostic evaluation	0	$104.00	104.00
8/17/2015	Psychosocial support	0	$56.23	56.23
8/17/2015	Psychotherapy	0	$46.25	46.25
8/12/2015	Psychotherapy	1	$46.25	46.25
8/12/2015	Psychiatric diagnostic evaluation	2	$208.00	208.00
			Total: $476.73	Total: $475.73

Locate the desired service and click the hyperlinked text in the Diagnoses column. The Diagnosis Codes by Service form displays a list of diagnoses for the service.

Diagnoses

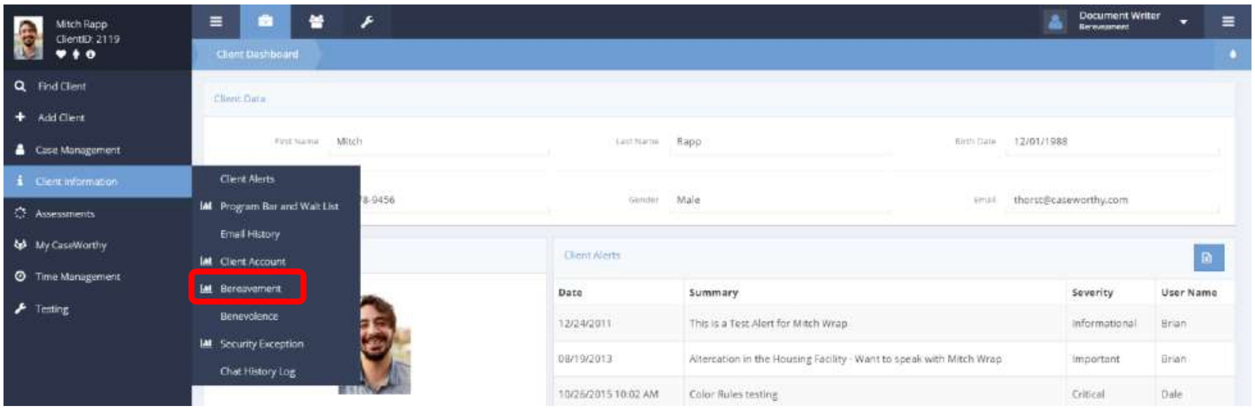
Diagnosis Codes by Service

Version	Long Description	Code	System ID
9	Other specified psychophysiological malfunction	306.8	3360
9	Psychogenic pain, site unspecified	307.80	3387

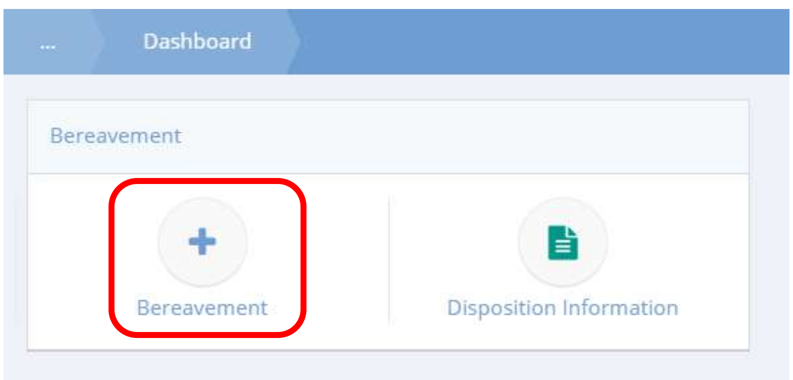
Bereavement

Objective: Record and manage client bereavement information.

Navigation: Client Dashboard>Client Information>Bereavement

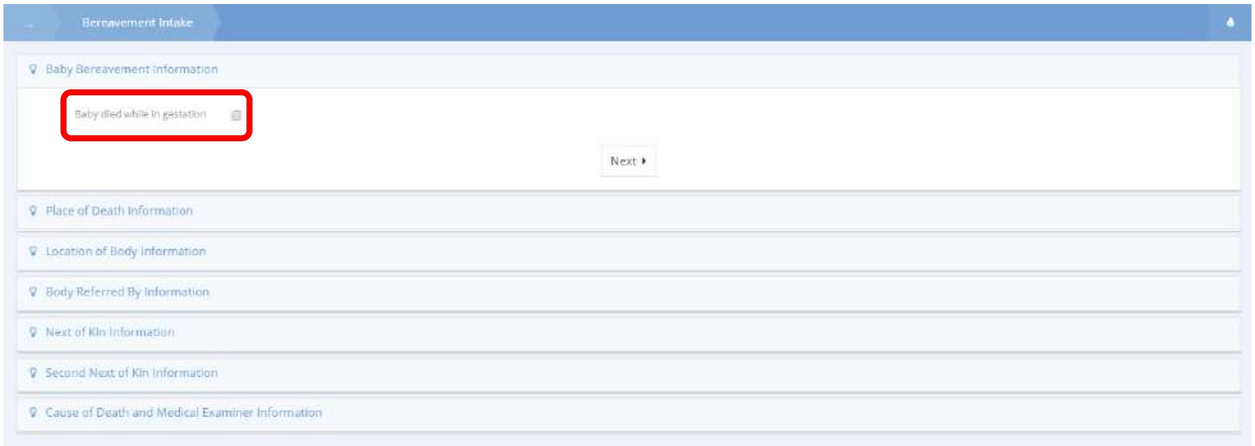


Select Bereavement from the Client Information menu under the Case Management tab. The Bereavement dashboard displays.

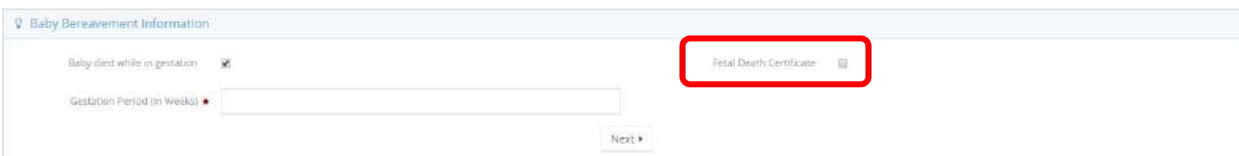


To enter bereavement information, click on the Bereavement icon.

The Bereavement Intake form displays.

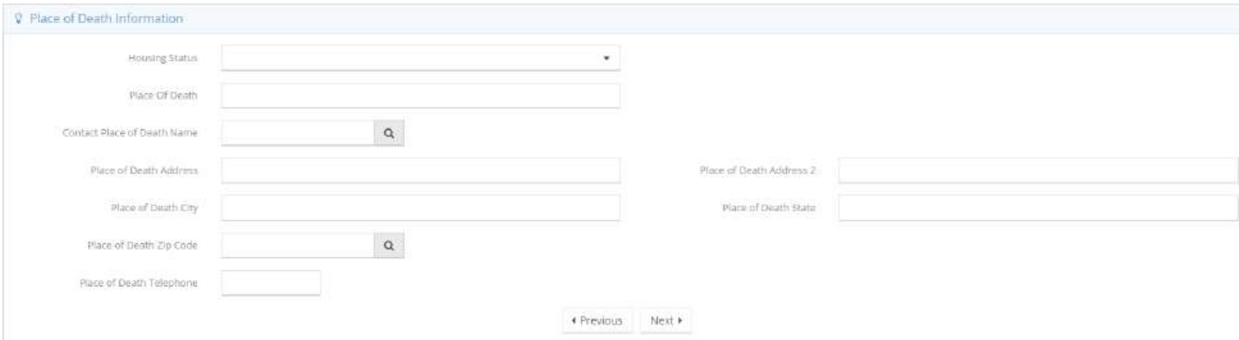


If the deceased is an infant, click on the “Baby died while in gestation” checkbox. More data fields appear.

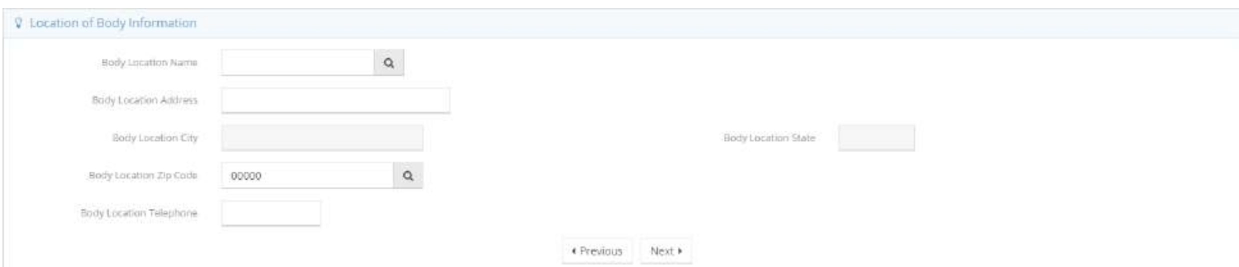


Enter the gestation period. To indicate death certificate existence, check the box labeled Fetal Death Certificate. Click the Next button.

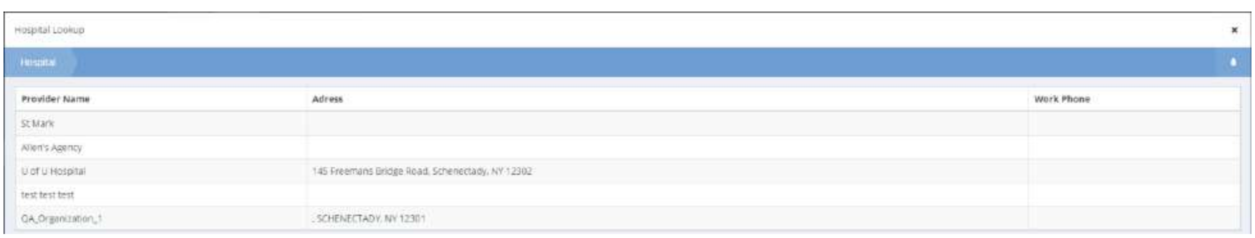
The Baby Bereavement Information section collapses and the Place of Death section expands to allow input.



Enter the desired information. To add a place of death, click the icon. The Select Client Entity Contacts Lookup form displays.

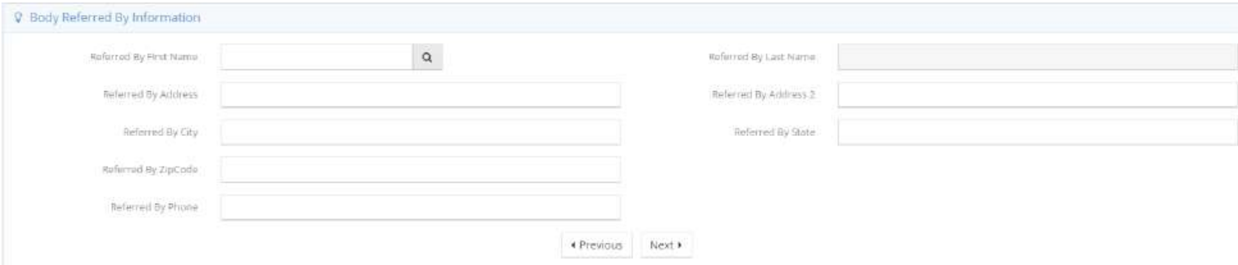


To select a body location, click the icon. The Hospital Lookup form displays a list of locations to choose from.

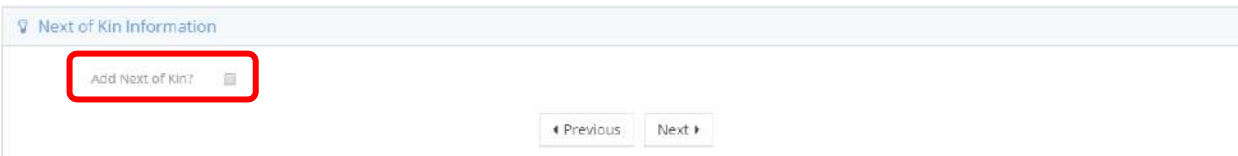


Select a location to return to the Location of Body Information section. The location information auto populates based on your selection. Fill in any remaining information manually, if desired.

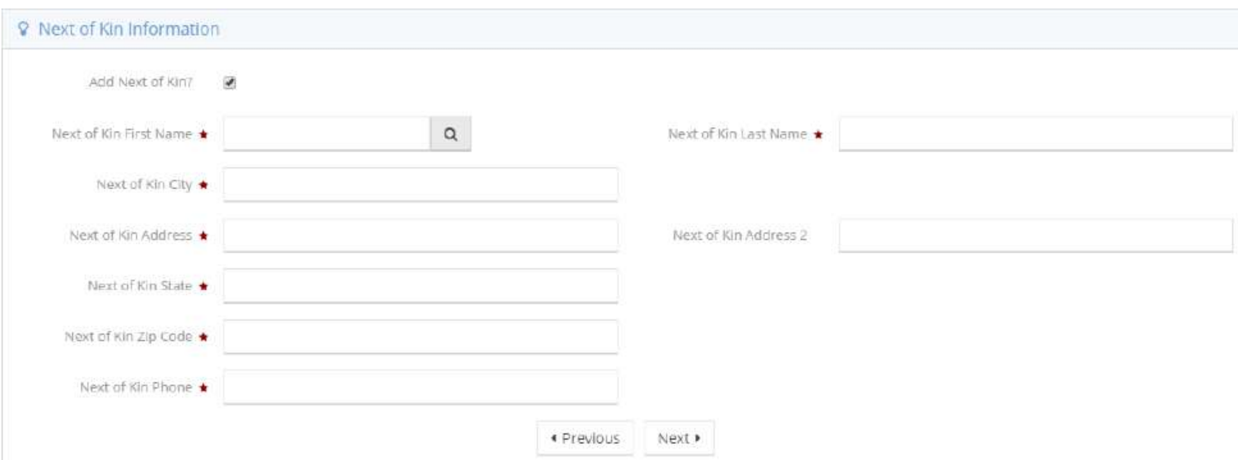
Click the Next button to collapse the Location of Body Information section, and expand the Body Referred By Information section.



Begin by clicking the icon to look up a contact. Once a client is selected, the last name automatically populates. Enter the remaining information and click the Next button to expand the Next of Kin Information section.

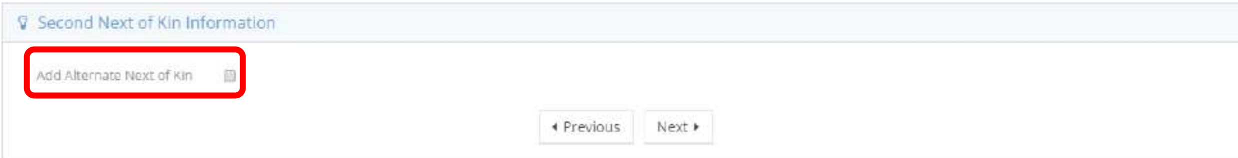


To add Next of Kin, click the checkbox. The section expands.

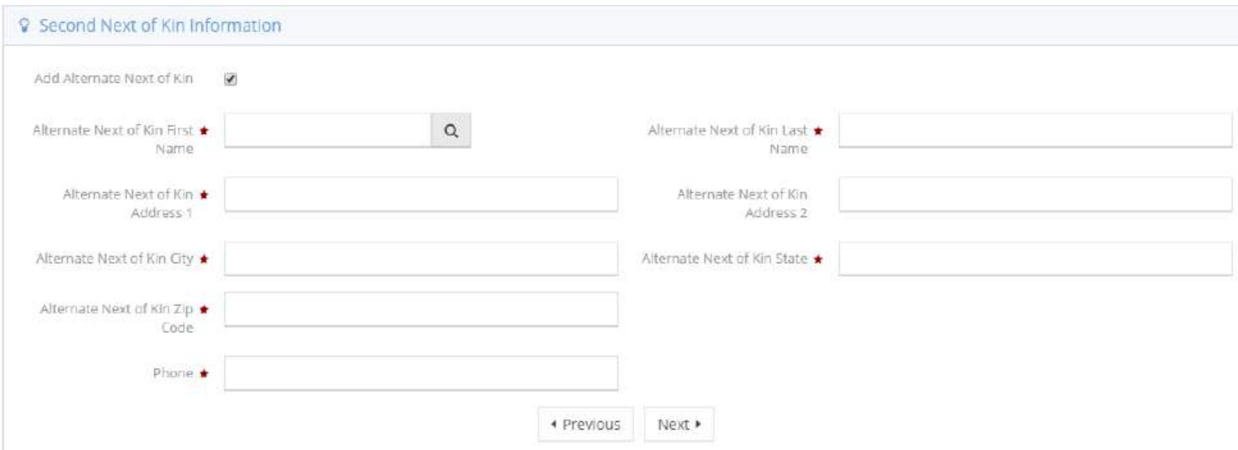


Click the icon to look up an existing contact. Select a contact to populate the remaining fields of information. If fields remain blank, fill in the rest of the required spaces manually.

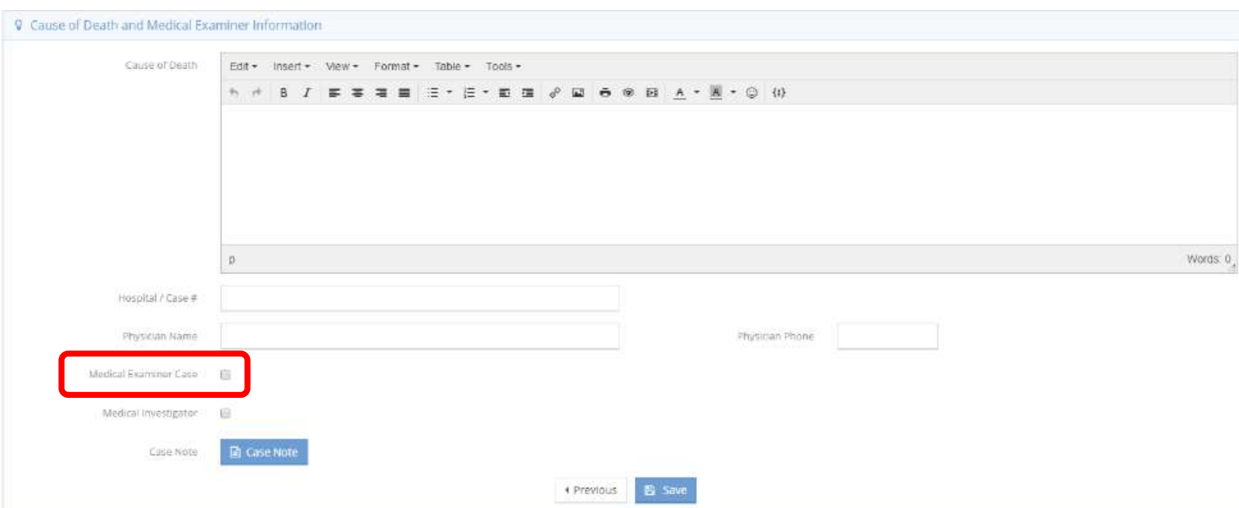
Click the Next button to expand the Second Next of Kin Information section.



To add an alternate Next of Kin contact, click the checkbox. The section expands.



Click the icon to look up an existing contact. Select a contact to populate the remaining fields of information. If fields remain blank, fill in the rest of the required spaces manually. Click the Next button to expand the Cause of Death and Medical Examiner Information section.

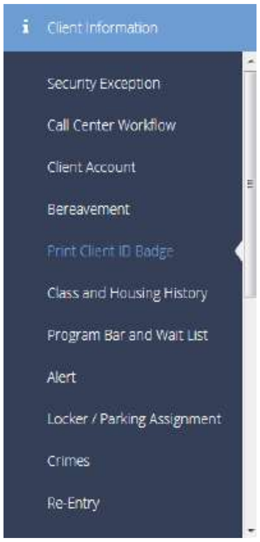


In the Cause of Death section, type any information relating to cause of death. Fill in any remaining information. To add information related to the Medical Examiner Case, click the checkbox labeled Medical Examiner Case. The field expands.

Click the icon to look up an existing contact. Select a contact to populate the remaining fields of information. If fields remain blank, fill in the rest of the required spaces manually. To add a Medical Investigator, click the checkbox labeled Medical Investigator. Four new fields appear.

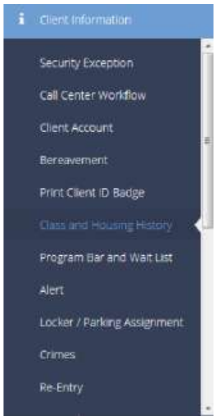
Click the icon to look up an existing contact. Select a contact to populate the remaining fields of information. If fields remain blank, fill in the rest of the required spaces manually. Add a case note, if desired, by clicking the Case Note button. Click the Save button to return to the Bereavement dashboard.

Print Client ID Badge



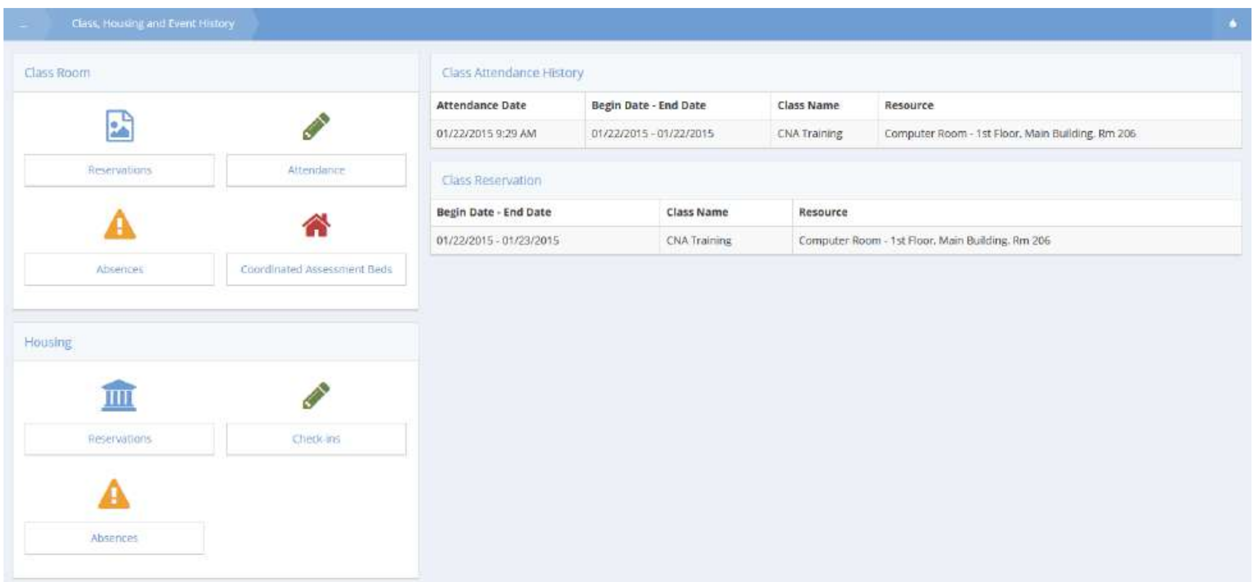
The next item on the Client Information menu is the Print Client ID Badge link. To use this functionality, be sure that a badge/card printer is connected to the computer. First use the drop-down list to select the desired badge template. Click the Click here for a printable version link. A new tab opens in the browser. Click on the printer icon on the right side of the tool bar to initiate the printing process.

Class and Housing History

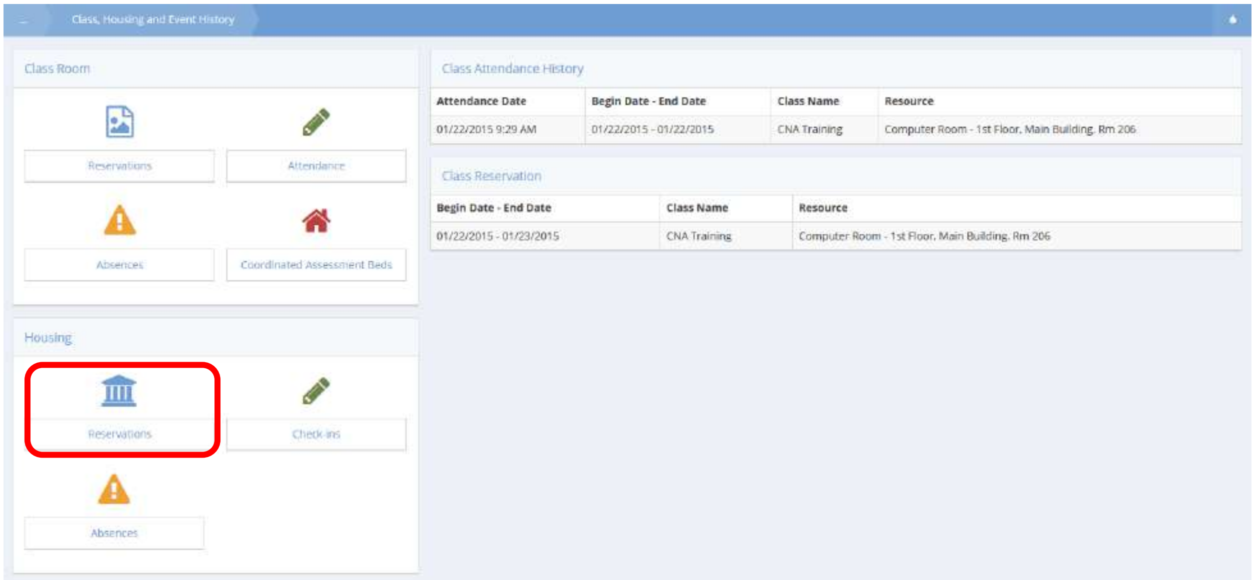


The next menu item in the Client Information menu group is the "Class and Housing History" dashboard. This dashboard allows the user to view the client's class history, housing history as well as current class and housing reservations.

Clicking on the icons links the user to the associated summary forms. There are also dashboard tables displaying data for quick reference.



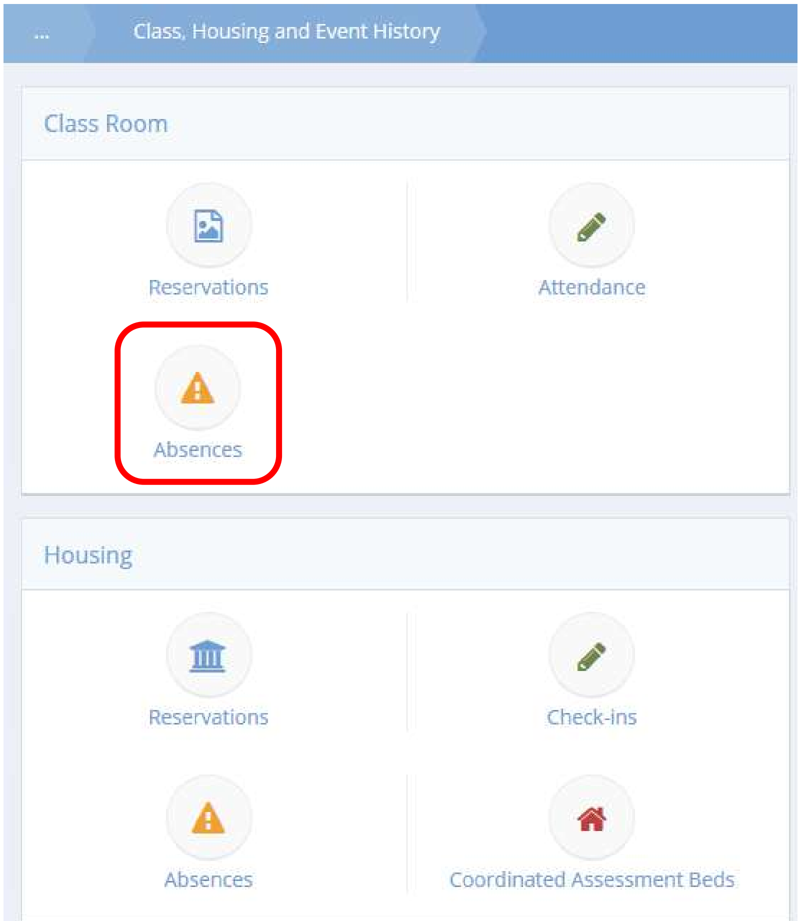
Select the Housing Reservations icon from the Class and Housing History window.



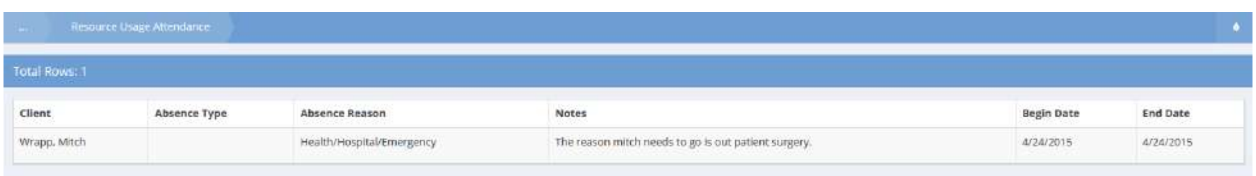
The Client Housing Reservations form displays.

Client Classroom Absence

Objective: View a summary of client classroom absences.



Click the icon for Absences under the Class Room section. The Resource Usage Attendance form displays.

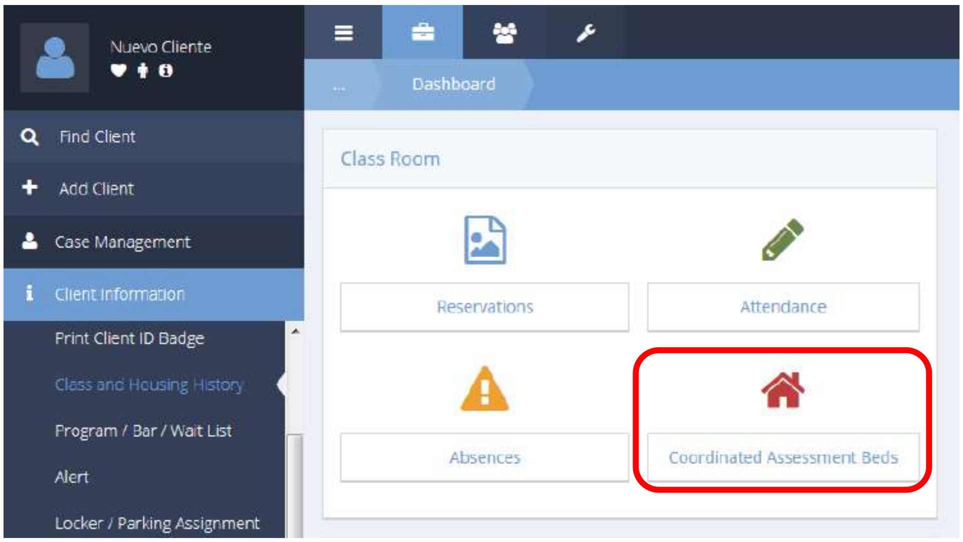


Client	Absence Type	Absence Reason	Notes	Begin Date	End Date
Wrapp, Mitch		Health/Hospital/Emergency	The reason mitch needs to go is out patient surgery.	4/24/2015	4/24/2015

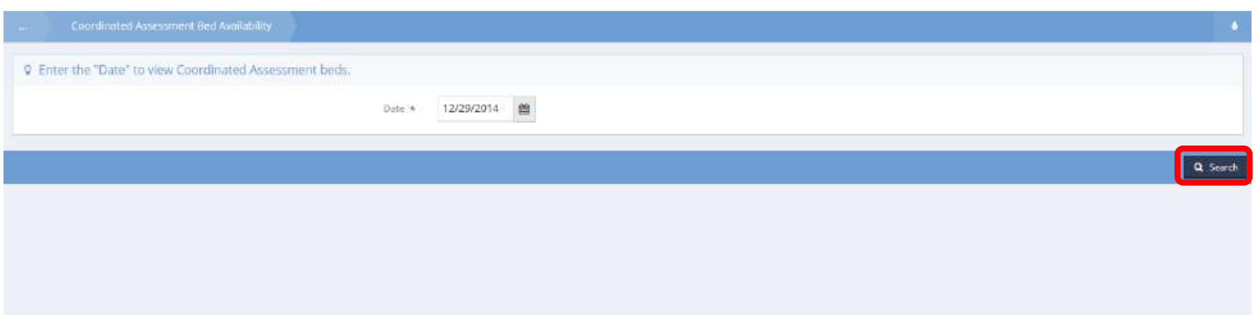
Any client classroom absences display in the spreadsheet.

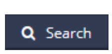
Coordinated Assessment Beds

Objective: Manage coordinated assessment beds. Includes actions such as viewing contacts and checking in.



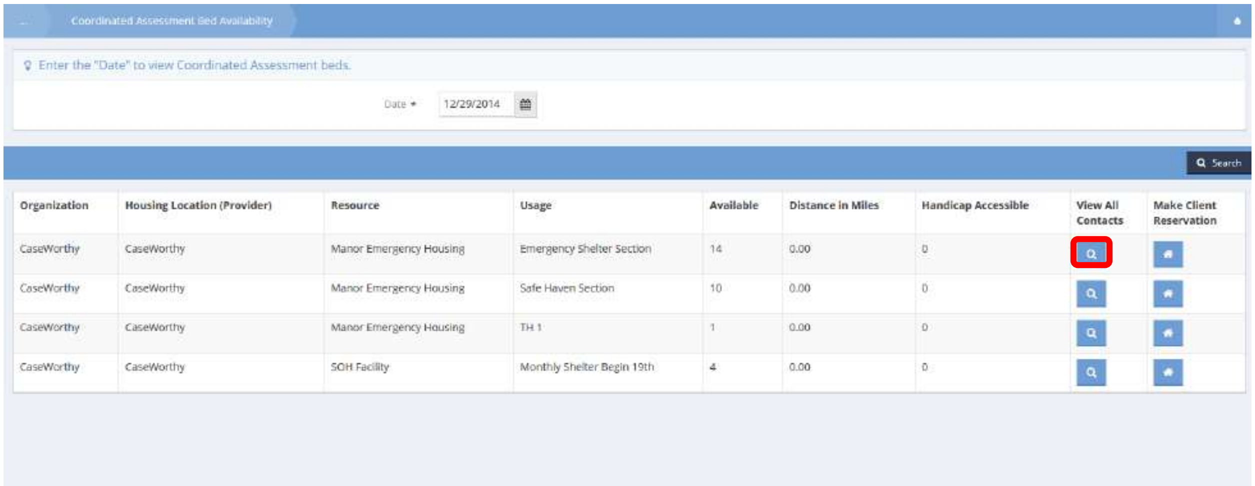
Click the Coordinated Assessment Beds icon on the Class Room menu. The Coordinated Assessment Bed Availability form displays.



Enter a date and click the 

button.

Results display in the lower half of the form.


Coordinated Assessment Bed Availability

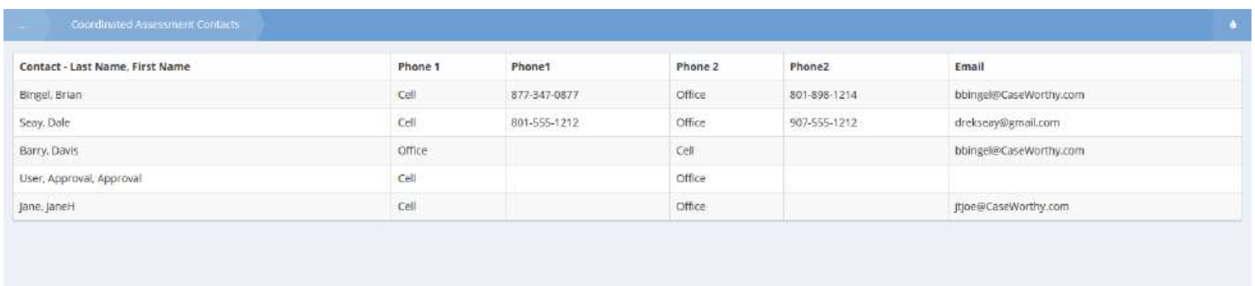
Enter the "Date" to view Coordinated Assessment beds.

Date * 12/29/2014

Search

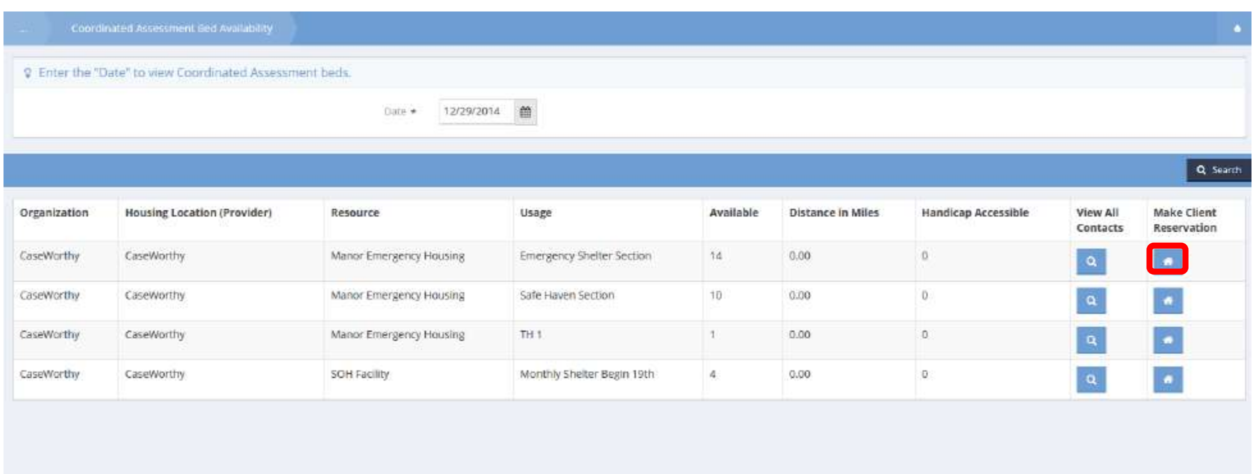
Organization	Housing Location (Provider)	Resource	Usage	Available	Distance in Miles	Handicap Accessible	View All Contacts	Make Client Reservation
CaseWorthy	CaseWorthy	Manor Emergency Housing	Emergency Shelter Section	14	0.00	0		
CaseWorthy	CaseWorthy	Manor Emergency Housing	Safe Haven Section	10	0.00	0		
CaseWorthy	CaseWorthy	Manor Emergency Housing	TH 1	1	0.00	0		
CaseWorthy	CaseWorthy	SOH Facility	Monthly Shelter Begin 19th	4	0.00	0		

Click the magnifying glass icon to view contacts for that slot. The Coordinated Assessment Contacts form displays.


Coordinated Assessment Contacts

Contact - Last Name, First Name	Phone 1	Phone1	Phone 2	Phone2	Email
Bingel, Brian	Cell	877-347-0877	Office	801-898-1214	bbingel@CaseWorthy.com
Seay, Dole	Cell	801-555-1212	Office	907-555-1212	drekseay@gmail.com
Barry, Davis	Office		Cell		bbingel@CaseWorthy.com
User, Approval, Approval	Cell		Office		
Jane, JaneH	Cell		Office		jtjoe@CaseWorthy.com

Click Done when finished viewing. The Coordinated Assessment Bed Availability form displays.


Coordinated Assessment Bed Availability

Enter the "Date" to view Coordinated Assessment beds.

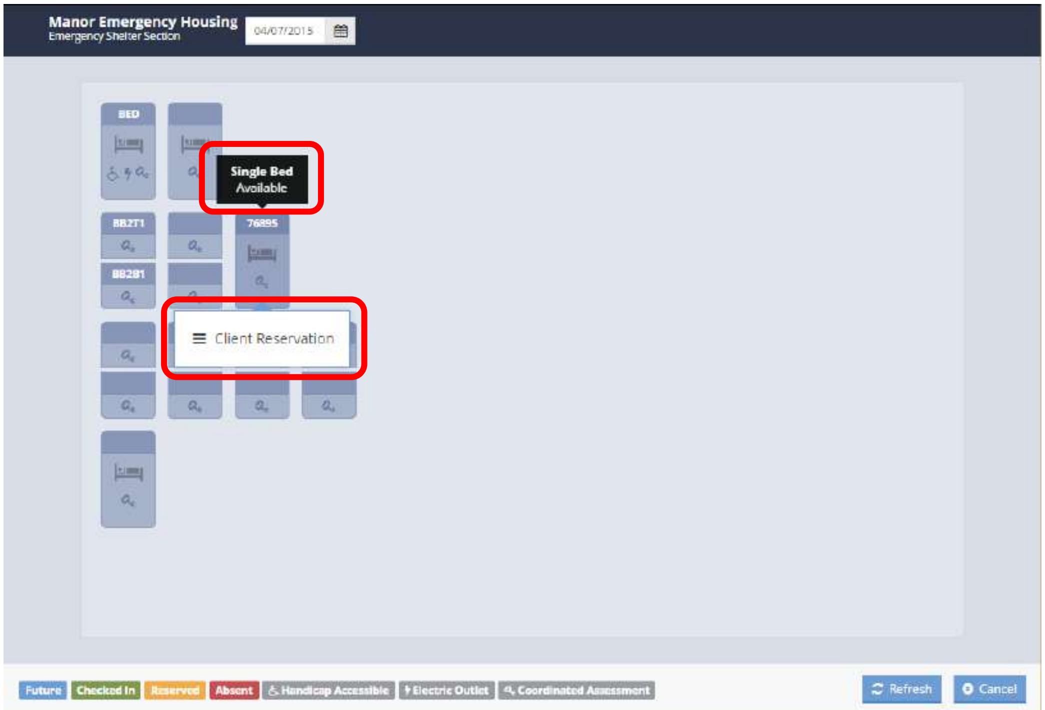
Date * 12/29/2014

Search

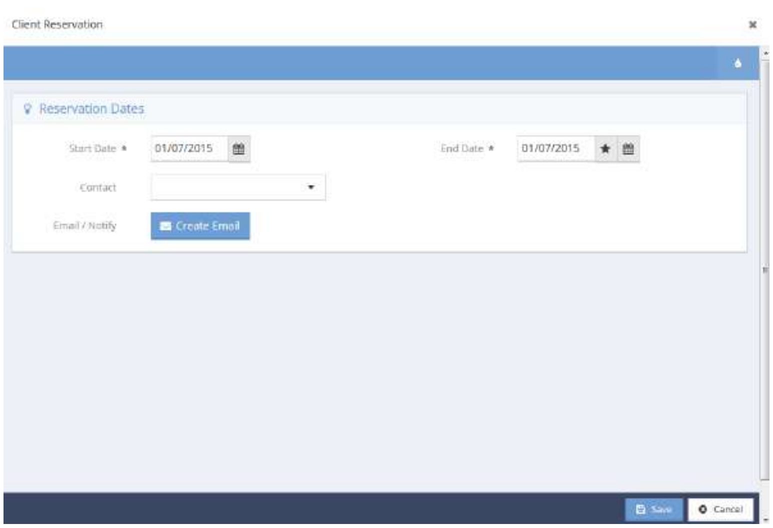
Organization	Housing Location (Provider)	Resource	Usage	Available	Distance in Miles	Handicap Accessible	View All Contacts	Make Client Reservation
CaseWorthy	CaseWorthy	Manor Emergency Housing	Emergency Shelter Section	14	0.00	0		
CaseWorthy	CaseWorthy	Manor Emergency Housing	Safe Haven Section	10	0.00	0		
CaseWorthy	CaseWorthy	Manor Emergency Housing	TH 1	1	0.00	0		
CaseWorthy	CaseWorthy	SOH Facility	Monthly Shelter Begin 19th	4	0.00	0		

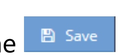
Click the house icon.

The Check-In Manager form opens in a new window.



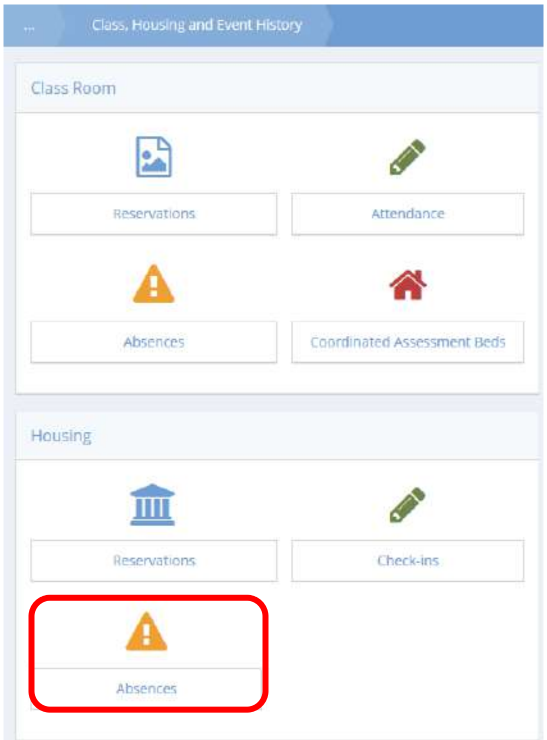
Hover over slot icons to check for availability. The availability shows in a pop up bubble. To make a reservation, click on the desired slot icon and select Client Reservation from the pop up menu that appears. The Client Reservation form displays.



Enter start dates, end dates, select a contact and add an email if desired. Click on the  button when finished.

Client Housing Absence

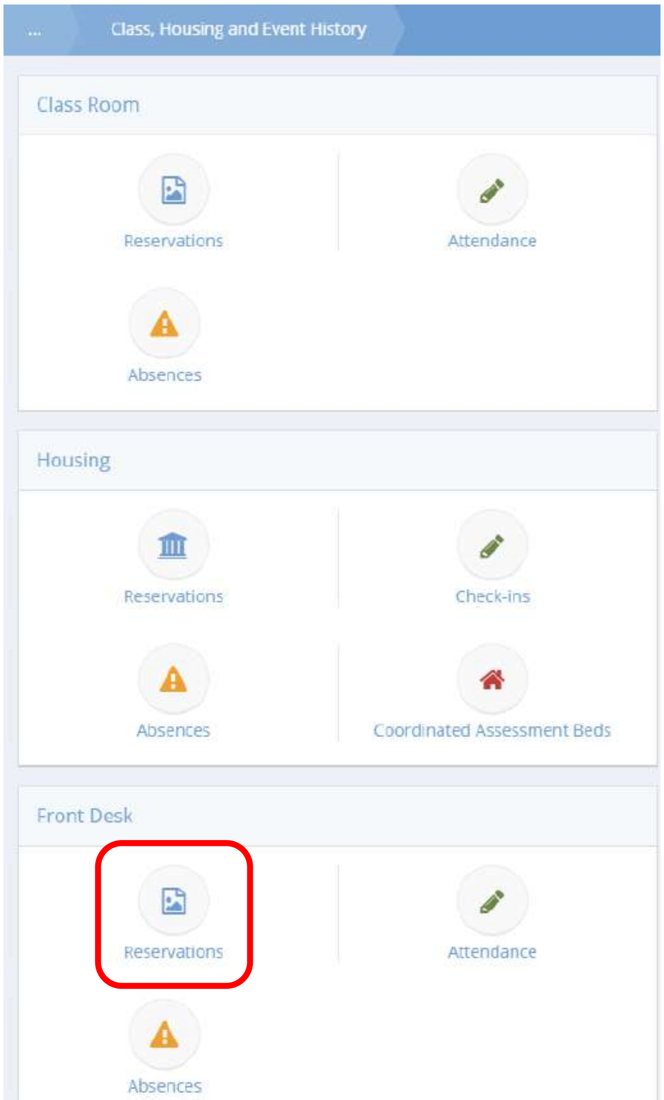
Objective: View a list of client absences



Click on the Absences icon for Housing. The Client Absence form appears listing the type of absence and reason for the absence.

Client Front Desk Reservations

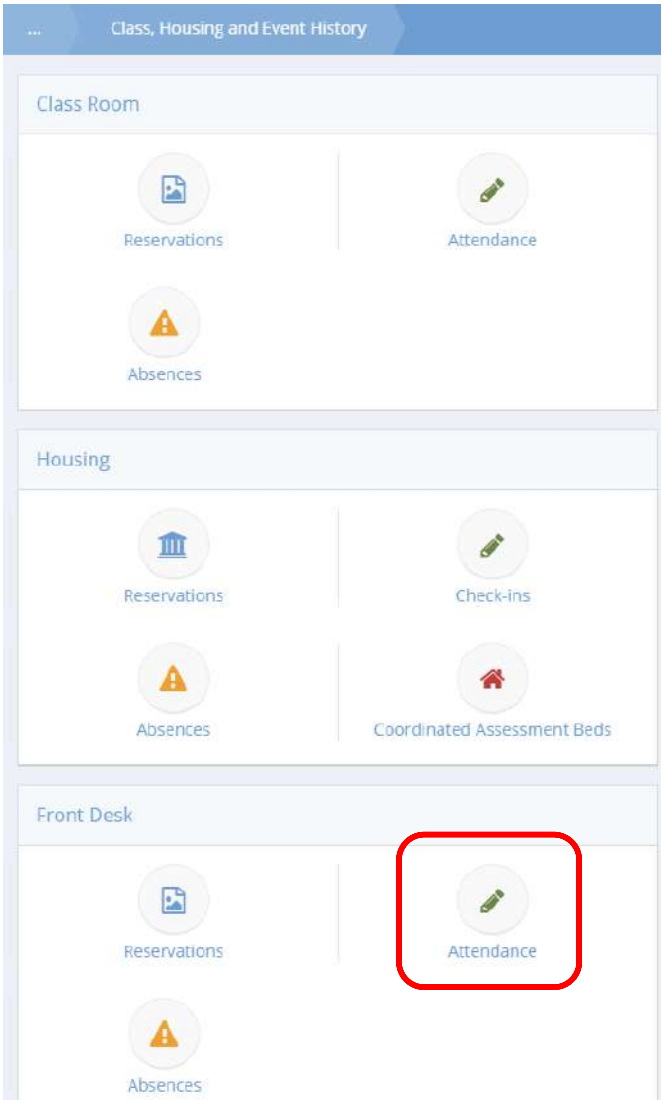
Objective: View a summary of client front desk reservations, attendance and absences.



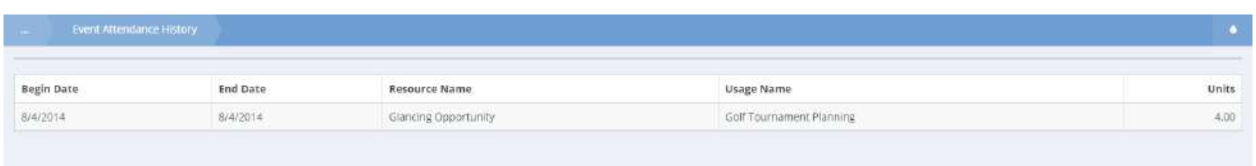
Click the icon for Reservations in the Front Desk section.

The Client Housing Reservations form displays any housing reservations for the currently selected client.

Front Desk Attendance

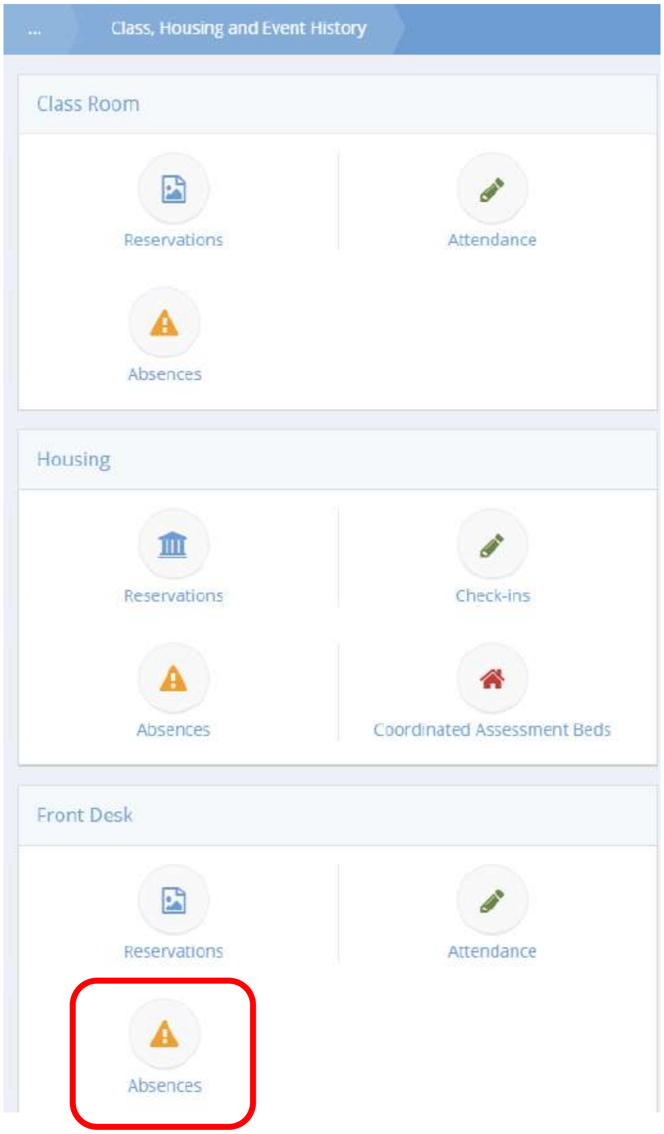


To view a history of the current client's event attendance, click the Attendance icon.



Any events the client has been recorded as attending display in the spreadsheet.

Front Desk Absences

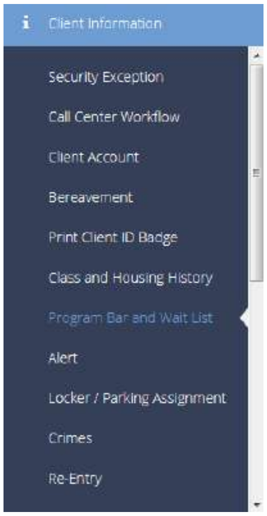


To view a history of the current client's absences, click the Absences icon.

Begin - End Dates	Resource	Usage Name	Absence Type	Absence Reason
2/12/2014 - 2/12/2014	Glancing Opportunity	Golf Tournament Planning	Not Excused	Forgot/Overslept

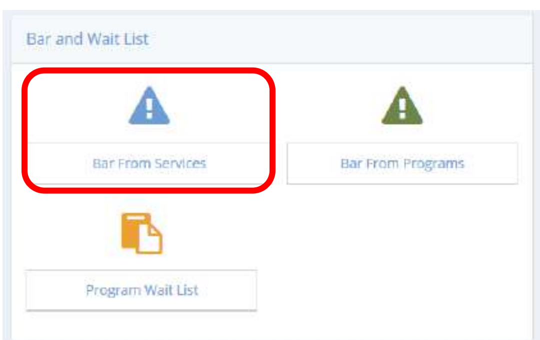
Any client absences display in the spreadsheet.

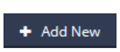
Program Bar and Wait List



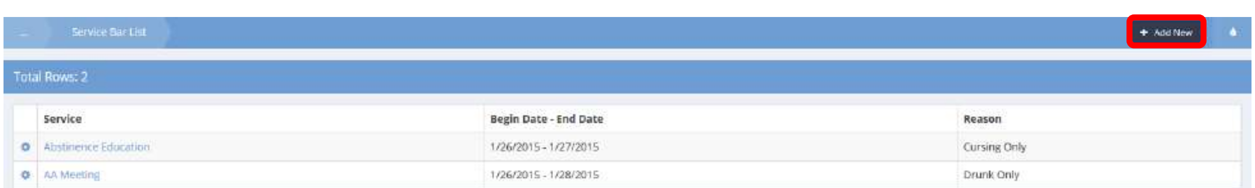
The next item in the Client Information menu group is the "Program/Bar/Wait List" dashboard. These forms allow the user to bar a client from programs or services, or place a client on a wait list.

Clicking the "Bar from Services" icon opens the bar from services summary form.



Click 

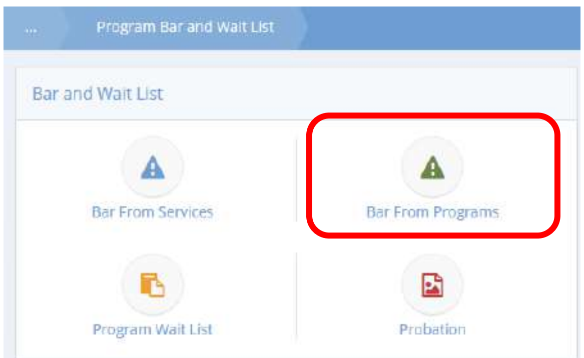
to bar a client from a service.



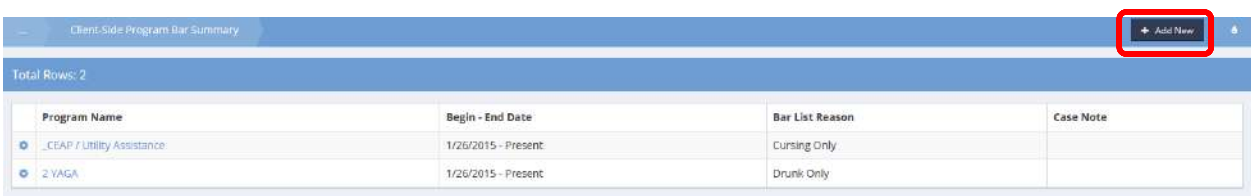
The Add New form displays.

Select the barred service by clicking the clear checkbox next to the service. Enter an end date, and select a reason for the bar.

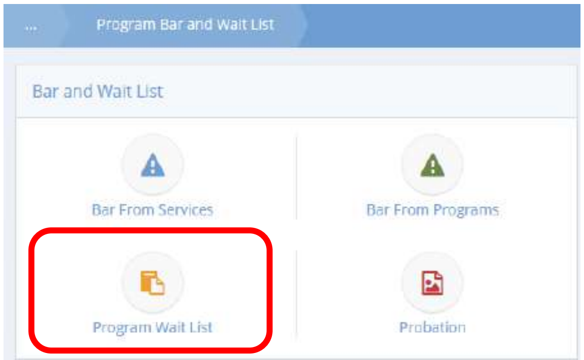
Bar From Programs



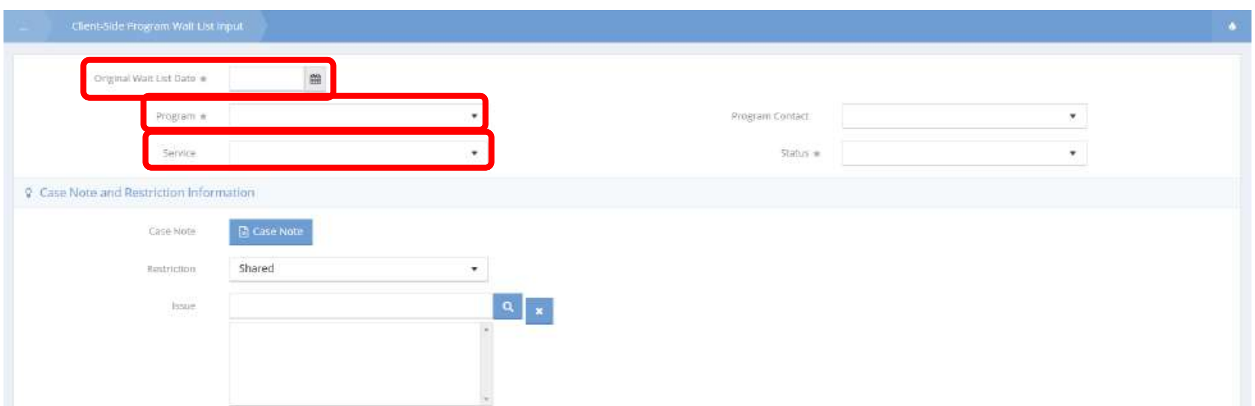
Clicking the "Bar from Programs" icon opens the bar from the programs summary form. Click **Add New** to bar a client from a program. Select the barred program by clicking the clear checkbox next to the program name. Enter an end date, and select a reason for the bar.



Program Wait List

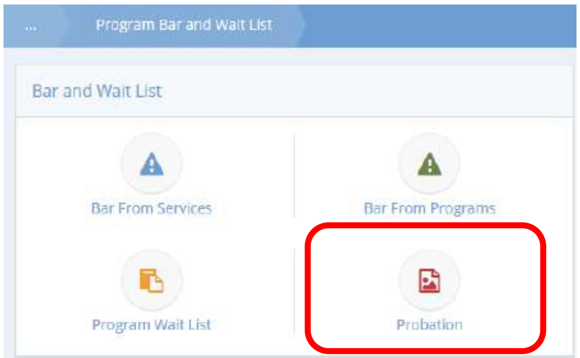


Clicking the "Program Wait List" icon opens the program wait list summary form. Click Add New to place a client on a wait list for a program. Add a wait list date, then select a program and enter a status. If applicable, select a specific waitlist service.



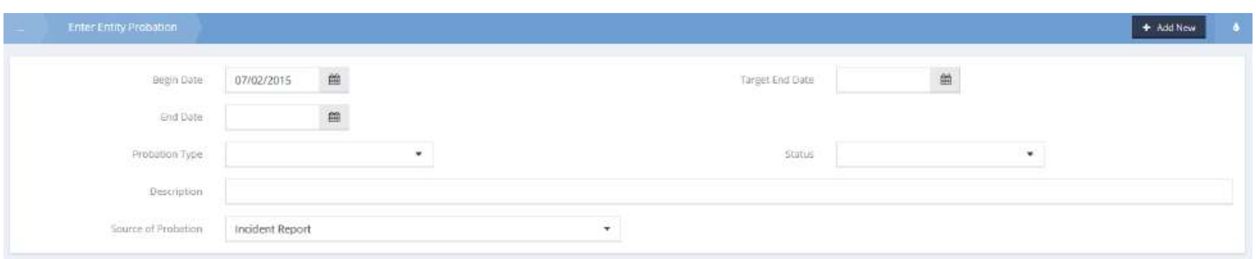
Entity Probation

Objective: Manage client probation info.



Click the icon for Probation. The Entity Probation form displays.

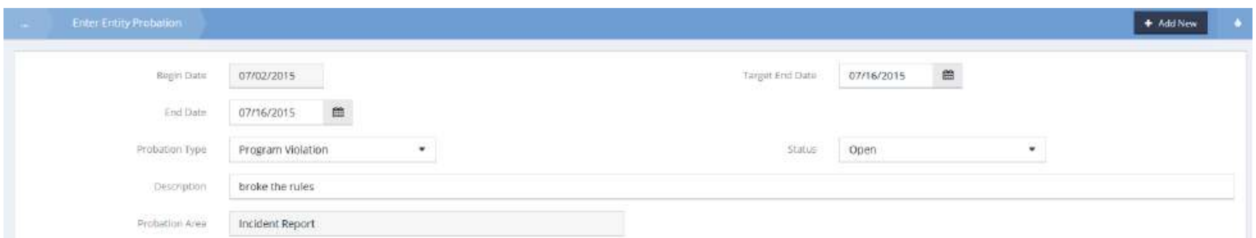
To add a new probation, click the **+ Add New** button. The Enter Entity Probation form displays.



Fill out all applicable fields and click **Save** when finished.

Edit

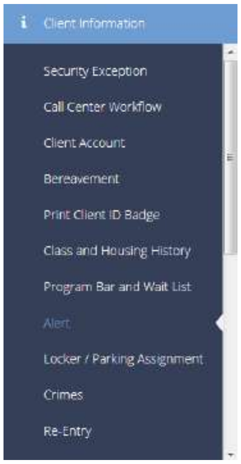
To edit an existing probation, click the action gear  icon associated with the desired probation and select Edit from the popup menu that appears.



Make any desired changes and click 

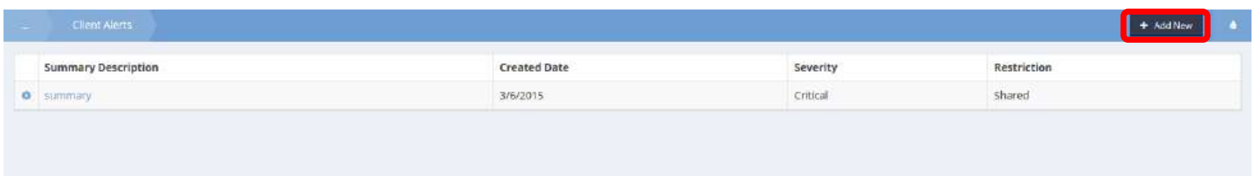
when finished.

Alert

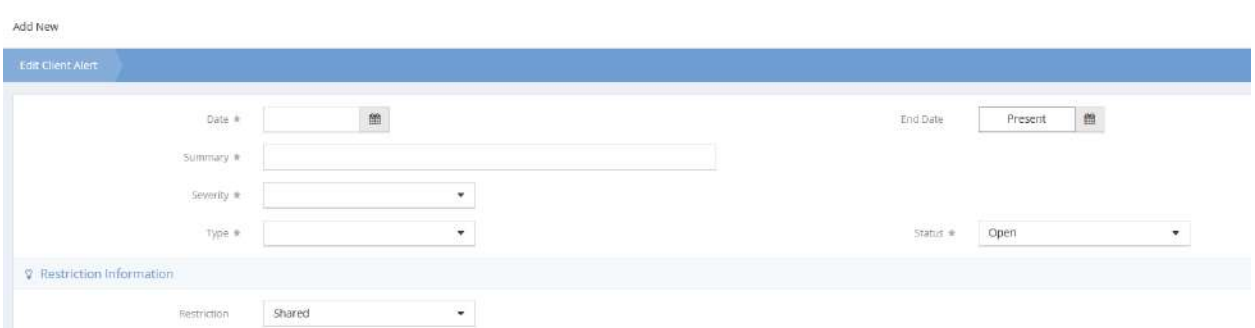


The next menu item in the Client Information group is the "Alert" summary form. Alerts are designed to notify a user immediately of any important information they need to know about the client they are working with. To add a new alert, click **+ Add New** in the top right corner.

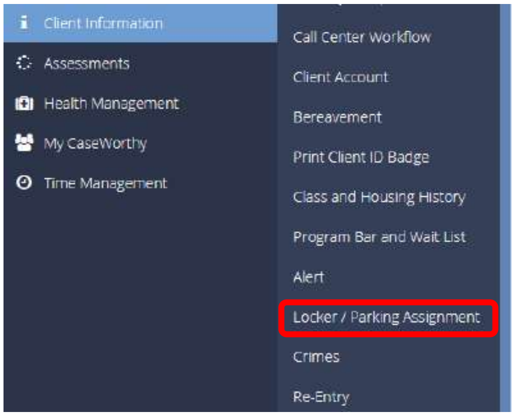
Note: ***Client alerts, once saved, also appear in a dashboard query on the client dashboard for quick reference.***



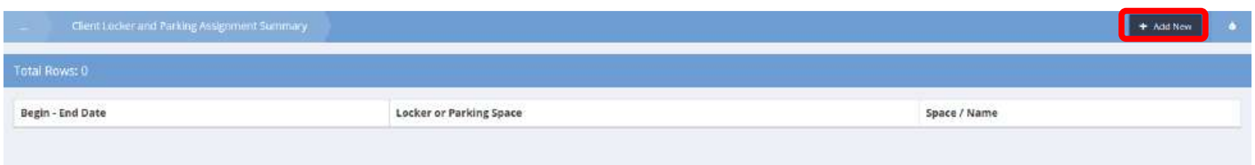
Enter an alert summary then select the severity (critical, important or informational) and the type (client status, health issue, probation or safety issue.)



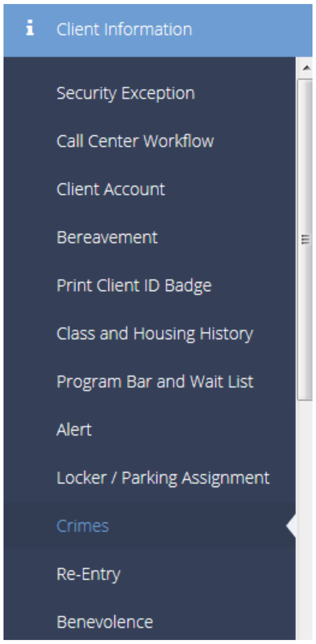
Locker and Parking Assignment



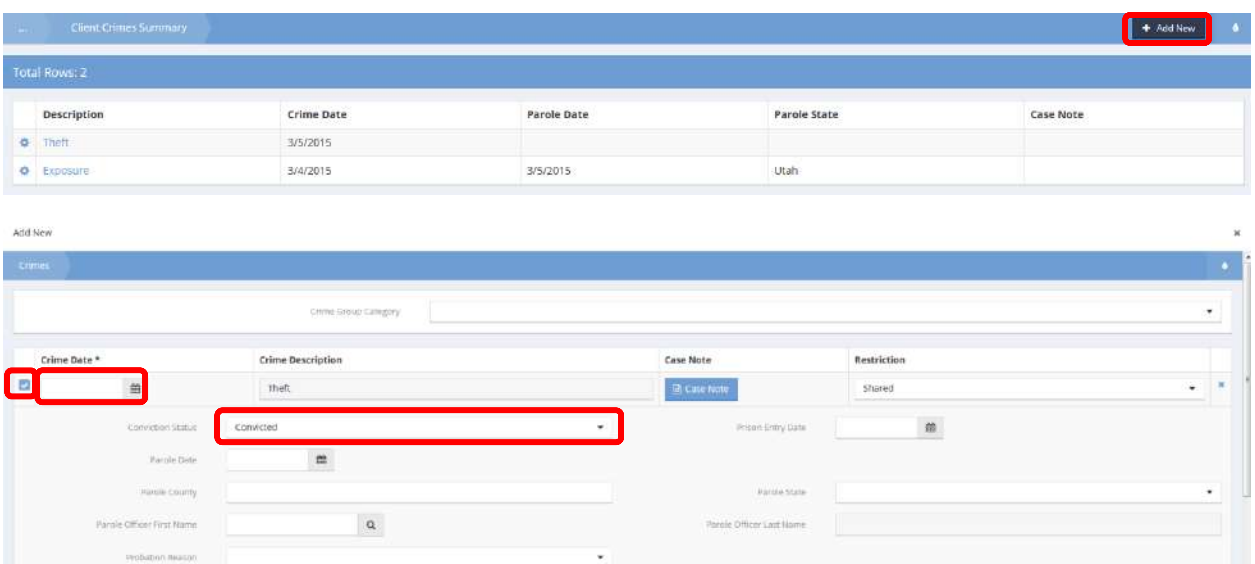
The next menu item in the Client Information menu group is the "Locker/Parking Assignment" summary form. To add a new assignment, click the + Add New button in the top right corner. Select a resource or location, then look-up an associated locker or parking space.



Crimes

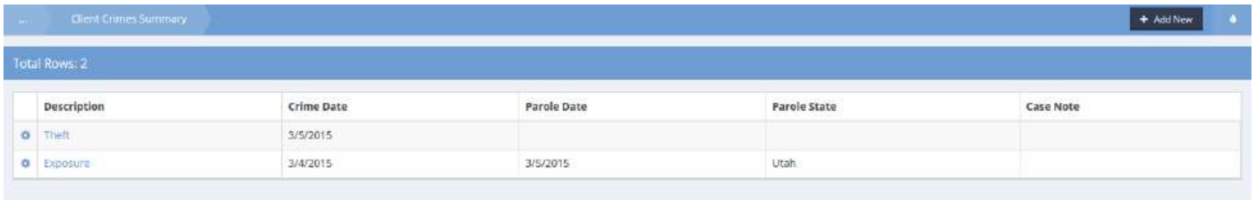


The next menu item in the Client Information menu group is the "Crimes" summary form. This form displays any crimes that have been recorded for a client. To add a new crime, click the + Add New button in the top right corner. Click the clear checkbox next to the crime to select. Add a crime date and conviction status. If the crime status is set to "Convicted" the form asks a number of additional questions.

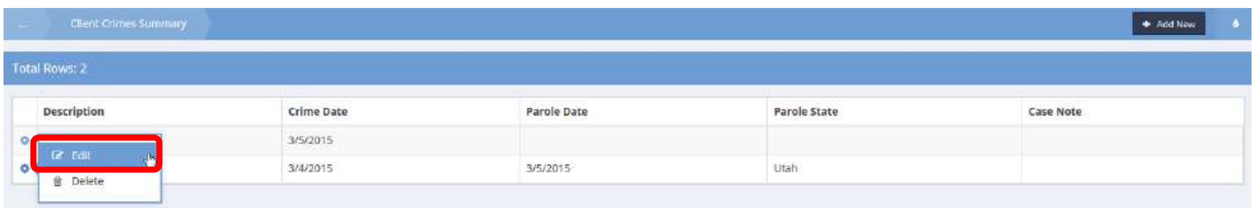


Parole Officer’s Name Lookup

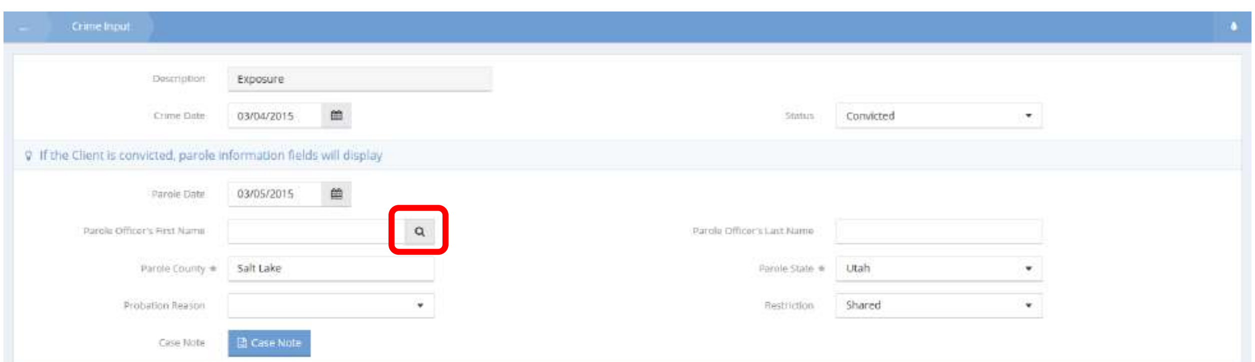
Objective: Establish (by adding new) and access a list of parole officers.

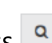


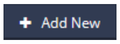
Click on the action gear  for the desired crime. Select Edit from the pop-up menu.



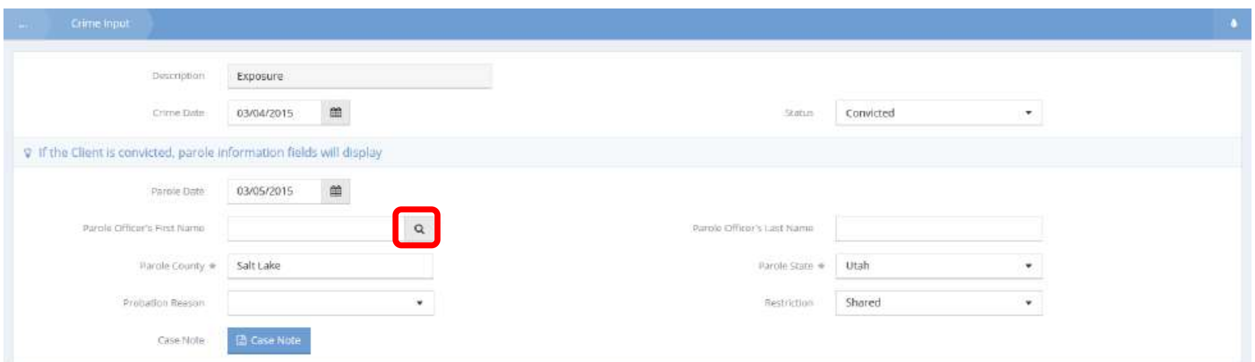
The Crime Input form displays.



Enter the desired information. To enter the parole officer’s name, click on the magnifying glass  icon.

The Parole Officer’s Name Lookup form appears. If the desired parole officer’s name is not displayed, click on the  button. New fields display to add a new parole officer’s information.

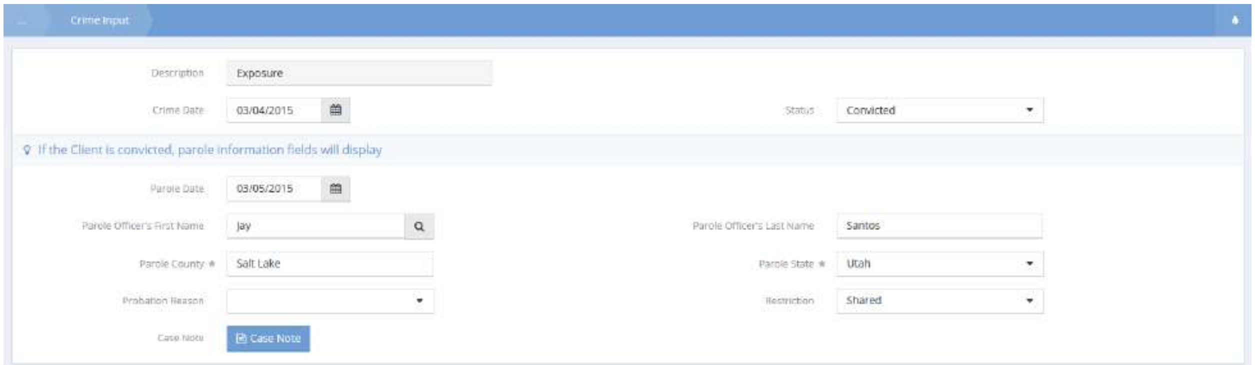
Enter the desired information and click on the  button. The Crime Input form re-displays.



Click on the magnifying glass  icon. The Parole Officer’s Name Lookup form appears.

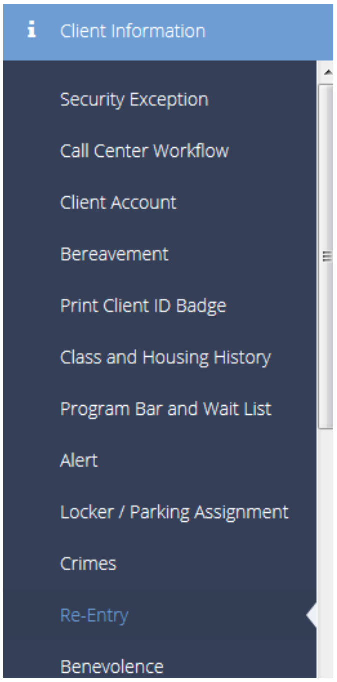
Click on the desired parole officer’s row.

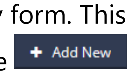
The parole officer's name now appears on the Crime Input form.



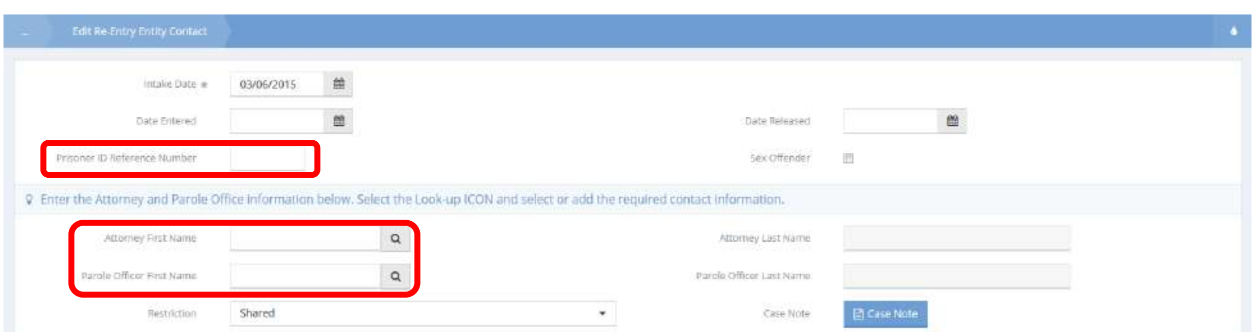
Click on the  button.

Re-Entry

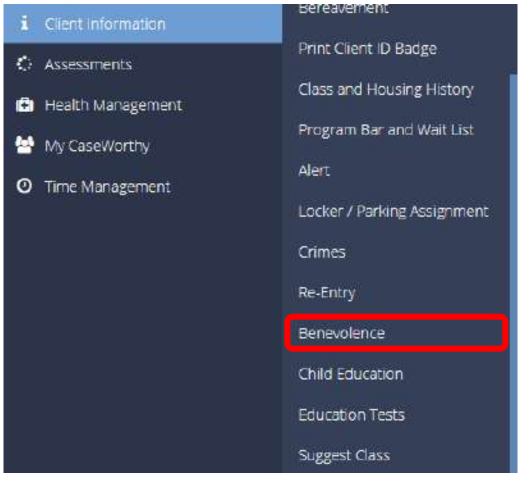


The next menu item in the Client Information menu is the "Re-Entry" summary form. This form is used to track prisoner re-entry information for a client. To add a new re-entry, click the 

button in the top right corner. Enter the client's Prisoner ID as well as associated dates. The attorney and parole officer look-ups pull from the client's contacts.

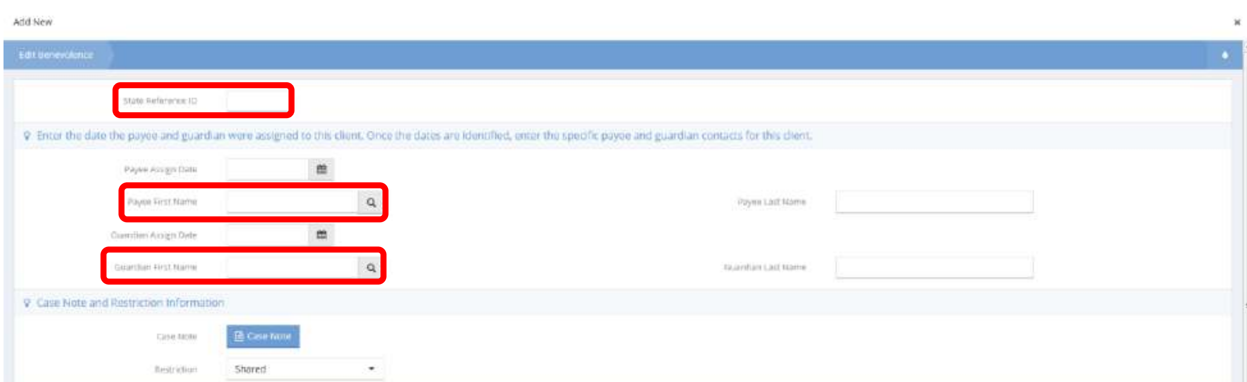


Benevolence

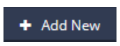


The next menu item in the Client Information menu group is the "Benevolence" summary form. This form allows the user to designate a payee and guardian for a client. To add a new benevolence entry, click the + Add New button in the top right corner. Enter the state reference ID, the first name, last name and assign date for both the payee and guardian.

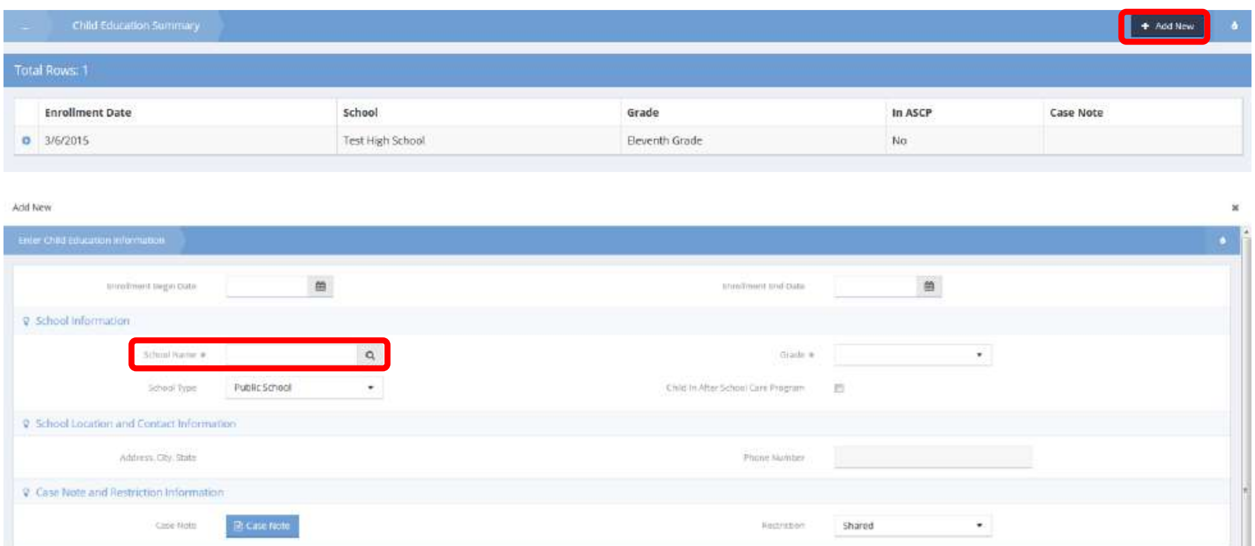
Note: ***The payee and guardian look-ups come from the client's contacts.***



Child Education

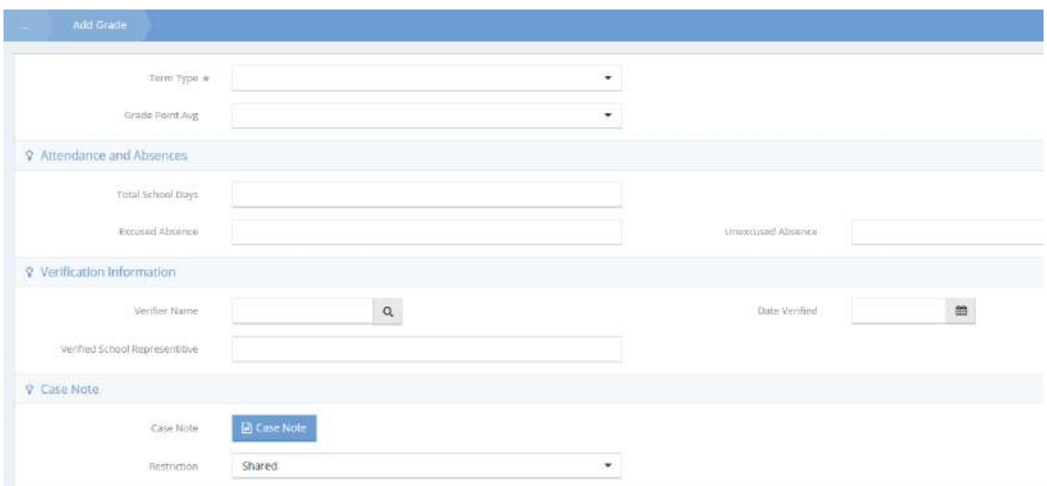
The next menu item in the Client Information menu group is the "Child Education" summary form. This form allows the user to track specific details related to a child's education. To add a new entry, click the 

button in the top right corner.



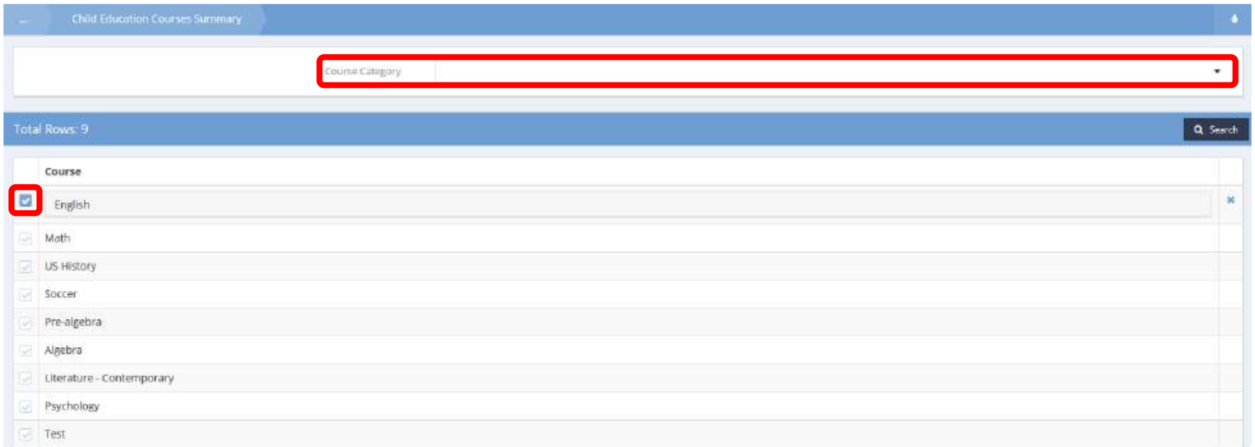
To add grade and attendance information to the entry, click the action gear and select "Grades and Attendance".

Click Add New to add new grade and attendance information.

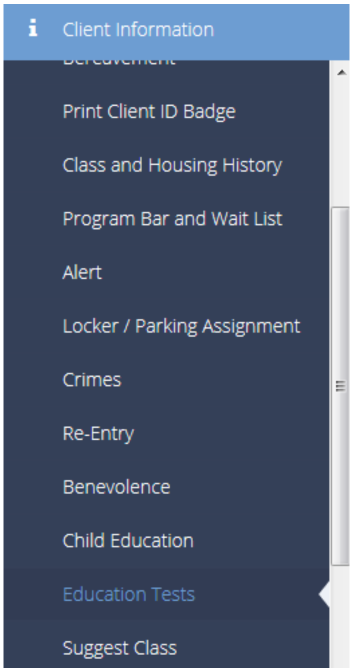


To add courses, click the action gear and click Courses.

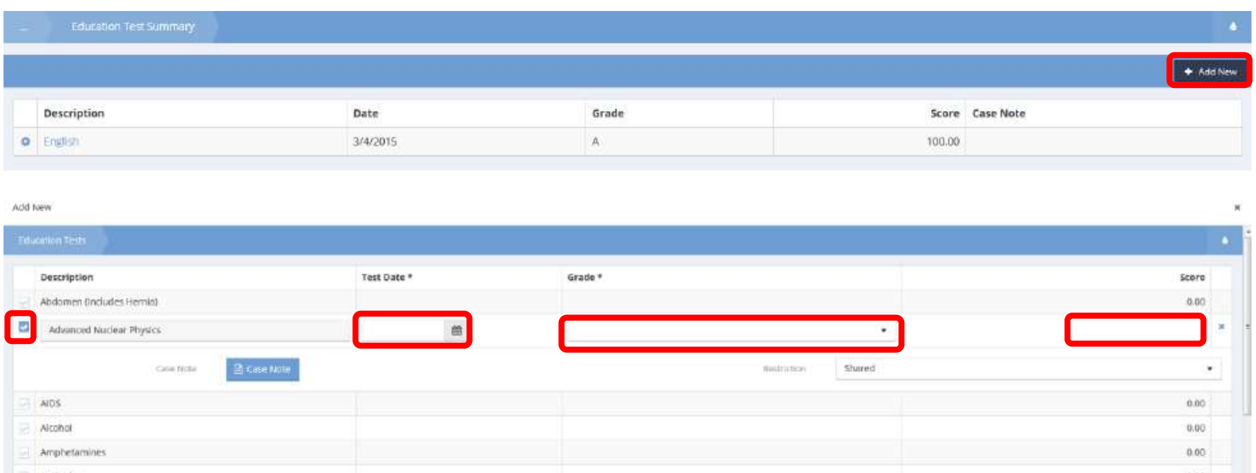
Use the dropdown list to filter the list of courses. To add a course, click the clear checkbox next to the desired course.



Education Tests



The next menu item in the Client Information menu group is the "Education Test" Summary form. This form allows the user to track the test a client takes as well as the associated results. To add a new test, click the Add New button in the top right corner. Click the clear checkbox next to the appropriate test then record the score, date, and grade.

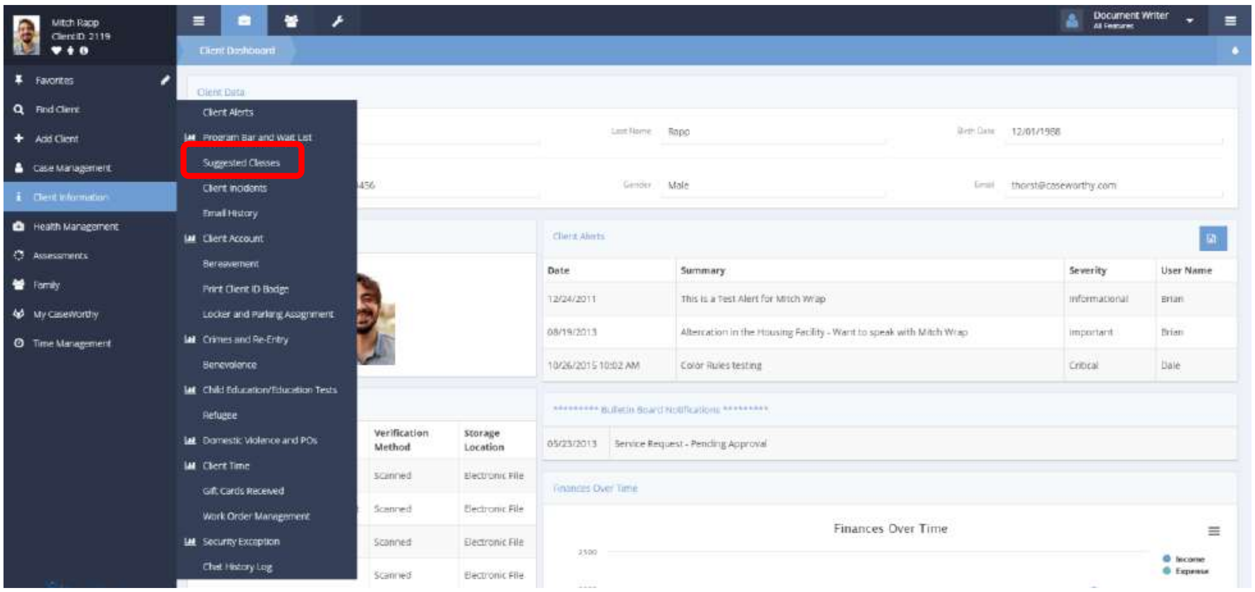


Suggest Class Reservation

Objective: Suggest classes for a client to enroll in to help them in their program.

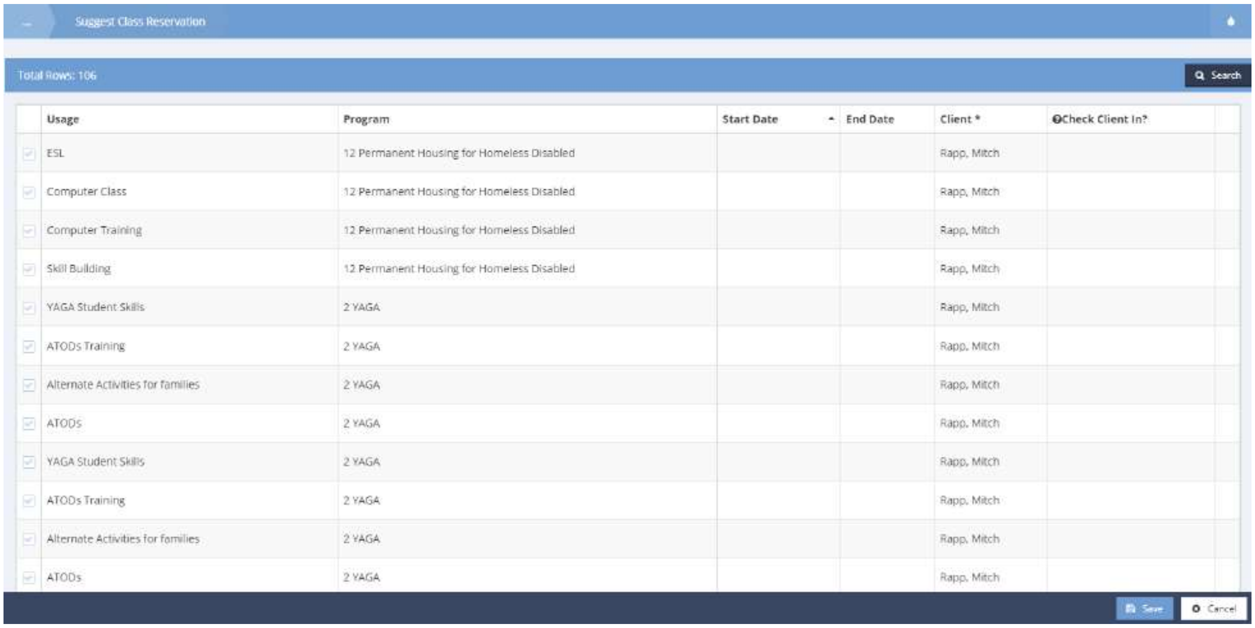
Navigation: Case management>Client Information>Suggested Classes

Note: ***Prior to using this form, classes must be assigned to a client. Navigation: Administration>Setup>Mappings>Program>Action Gear>Suggest Classes. Click on the check boxes to expand the row and type in the client's ID number. Click the*** Save ***button to save.***



Under the Case Management tab, select Client Information. A pop-up menu appears. Select Suggested Classes from the menu.

The Suggest Class Reservation form appears.



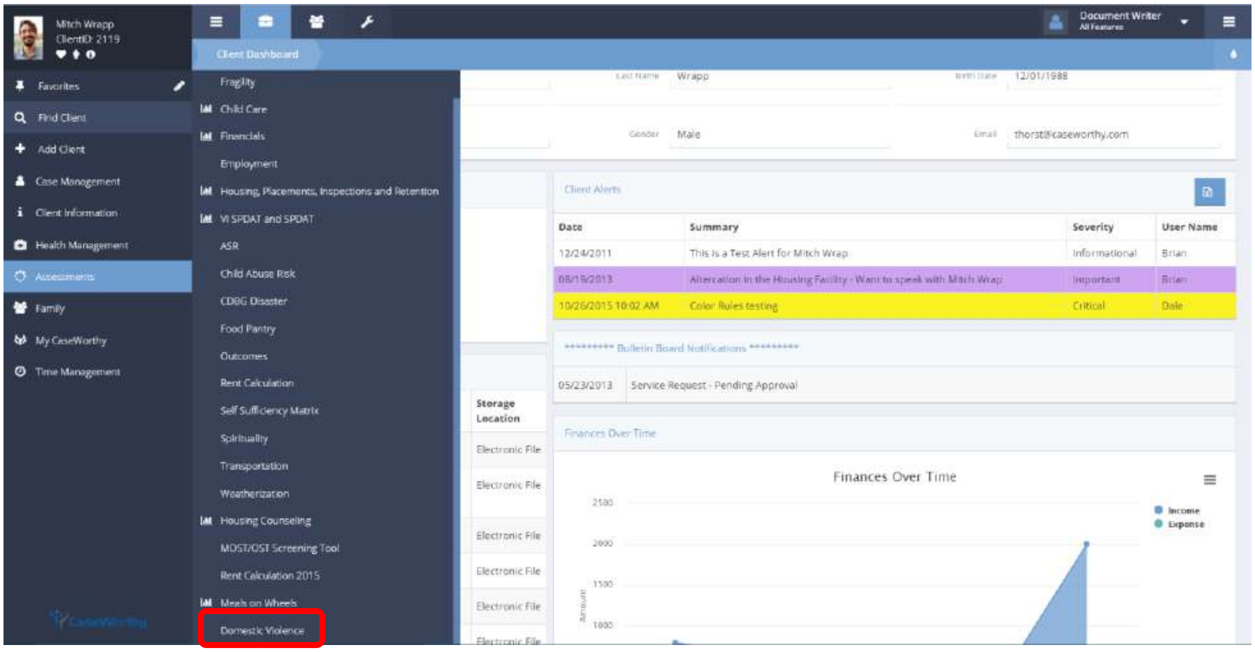
A list of pre-suggested classes appears. Click the icon to select a class. The icon turns blue and the row expands.

Select a Start Date and End Date by clicking on the date icons. Click the check box to check the client into the class at the same time. Click the Save button to save and close the form.

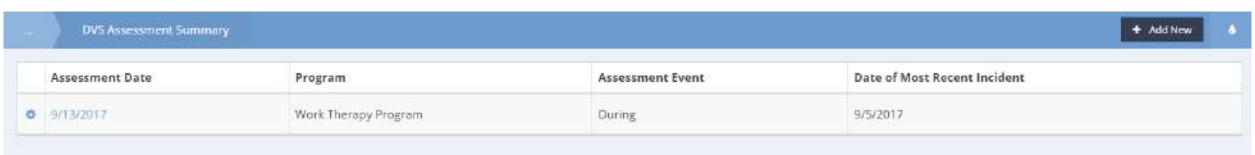
DVS Assessment

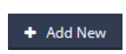
Objective: Domestic Violence Assessment.

Navigation: Case Management>Assessments>Domestic Violence>Add New



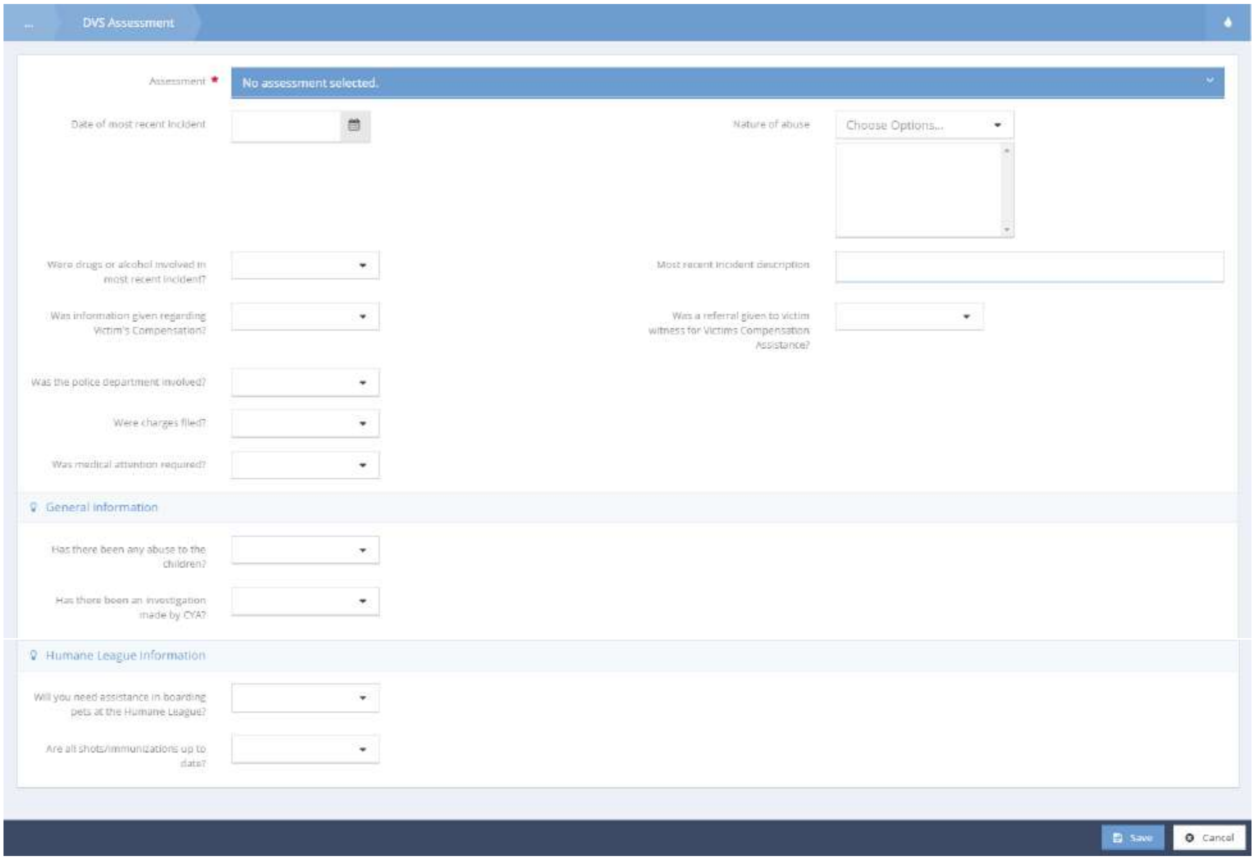
Under the Case Management tab, select Assessments. Select Domestic Violence from the pop-up menu that appears. The DVS Assessment Summary form appears.



To add a new domestic violence assessment, click the 

button.

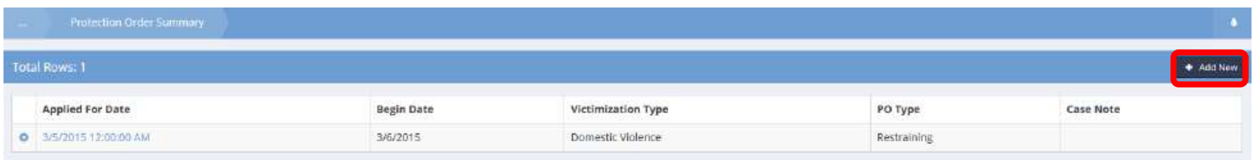
The DVS Assessment form appears.



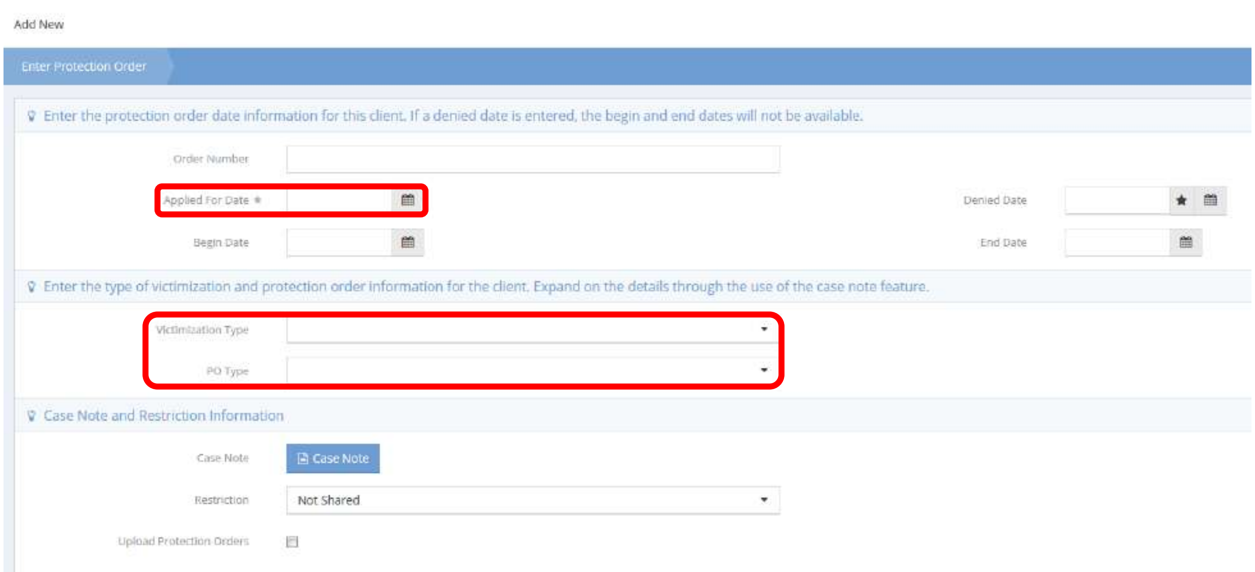
Select an assessment, and use the drop-down menus to fill out the form. Click the  button to save and close the form.

Protection Orders

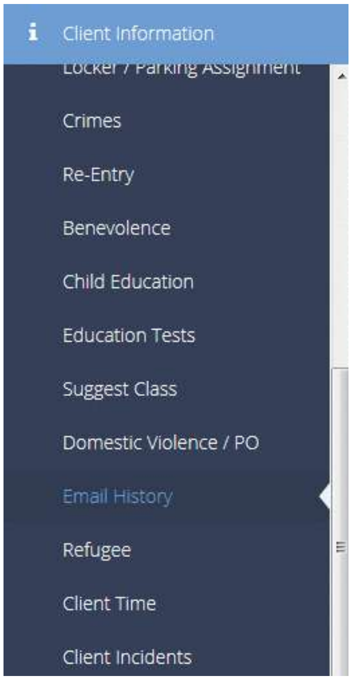
Clicking the "Protection Orders" icon opens the protection order summary form.



Enter an applied for date, and additional dates if applicable. Select a victimization type and PO type.

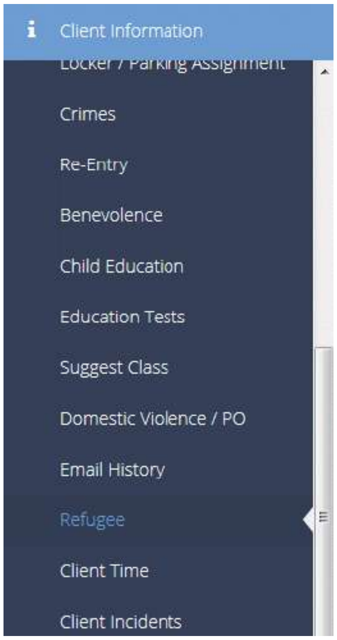


Email History

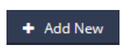


The next item in the Client Information menu group is the "Email History" summary form. This form displays all emails sent on behalf of a client. Click the View Email button to view the email in a pop-up window.

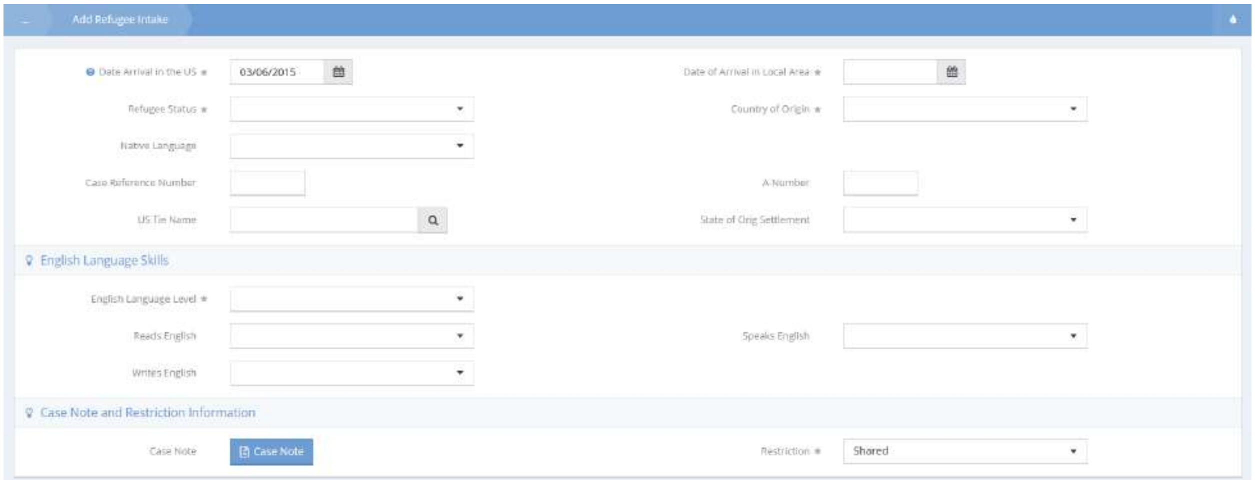
Refugee



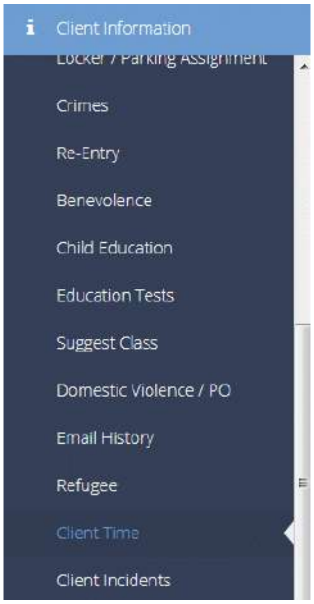
The next link on the Client Information menu is the Refugee Intake summary form. The Refugee Intake form collects client information common for Refugee and Immigration programs.

To enter Refugee information, click the  button on the summary form.

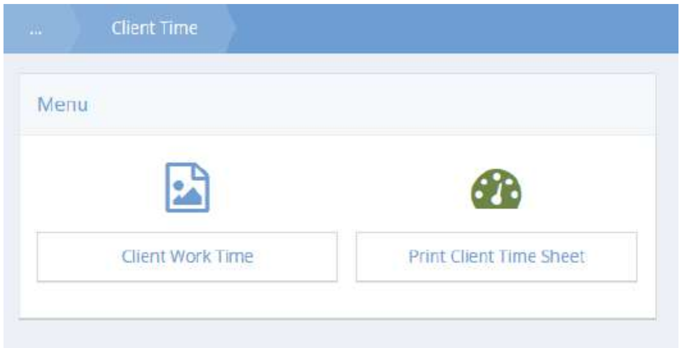
On the Add Refugee Intake form, enter all relevant/required information.



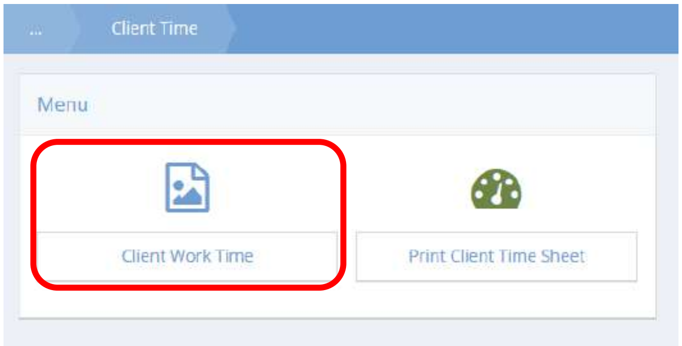
Client Time



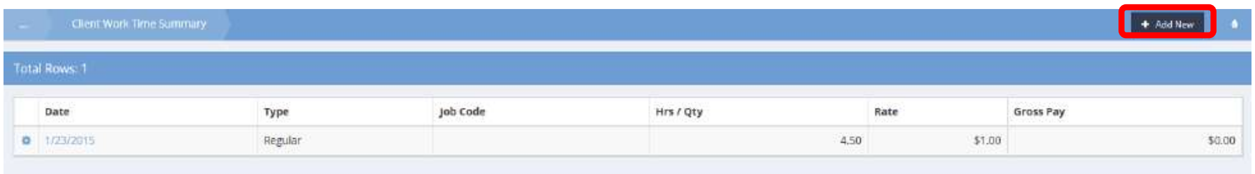
The Client Time dashboard allows for viewing, editing, and printing reports of client work time.



Client Work Time



To view or edit client time, click the icon for Client Work Time. The Client Work Time Summary form displays.


Client Work Time Summary
Add New
Total Rows: 1

Date	Type	Job Code	Hrs / Qty	Rate	Gross Pay
1/23/2015	Regular		4.50	$1.00	$0.00

Click Add New to enter new time.

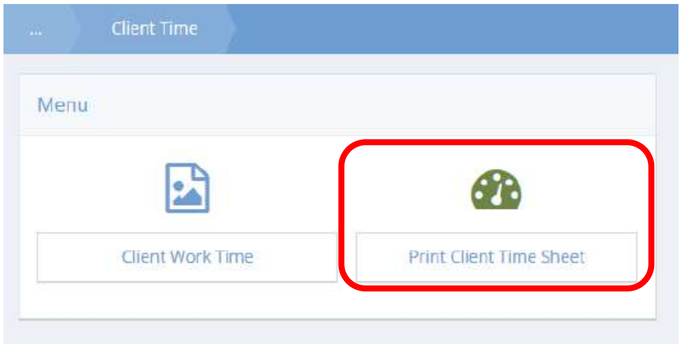
The Add Client Time form displays.

Enter a start date, time type, the number of hours worked and the rate if desired. To enter a job code, click the magnifying glass icon and select the desired job from the Provide Work Codes List Lookup form. Click Save when finished. The newly entered time displays in the Client Work Time Summary.

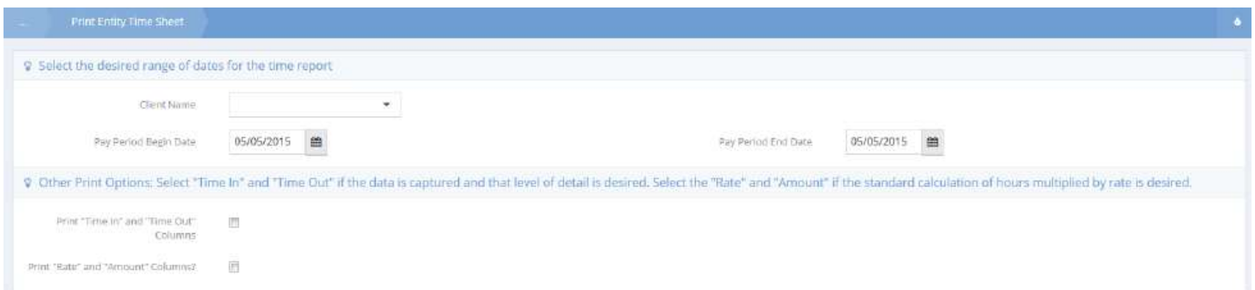

Provide Work Codes List Lookup
Provide Work Codes List
Total Rows: 29

Job Code Description	Work Rate
Junior Accountant	$10.00
Senior Accountant	$15.00
Junior Accountant	$7.00
Junior Accountant	$90.00
Office Manager	$70.00
Office Manager	$8.00
Senior Accountant	$9.00
Sweeper	$12.00
Sweeper	$10.00

Print Client Time Sheet



To generate a report of client time to be printed, click the Print Client Time Sheet icon. The Print Entity Time Sheet form displays.



Select a name from the drop-down list, enter the desired date range, and select either of the print options if desired. Click the  button when finished.

The report displays in a new window where it can be printed.

1 of 1 Find | Next

Client Time Sheet

Wrapp, Mitch

SSN: 123-42-1342 DOB: 5/27/1962

Pay Period: 5/1/2010 - 5/5/2015

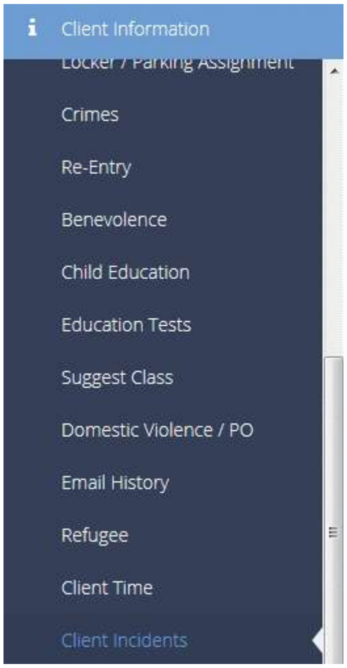
Date	Time Type	Hours	Customer	Project	Task
03/02/13	Regular	2.00	Goodwill Houston - Project Time (TEST)	Employment Contract Services	Client Work Services
04/19/13	Regular	4.00	Goodwill Houston - Project Time (TEST)	Employment Contract Services	File Clerk - Level 2
08/11/13	Regular	10.00	Goodwill Houston - Project Time (TEST)	Employment Contract Services	Client Work Services
08/11/13	Regular	6.00	Goodwill Houston - Project Time (TEST)	Employment Contract Services	File Clerk - Level 1
08/12/13	Regular	6.00	Goodwill Houston - Project Time (TEST)	Employment Contract Services	Client Work Services
08/12/13	Regular	4.00	Goodwill Houston - Project Time (TEST)	Employment Contract Services	File Clerk - Level 1
02/28/14	Regular	1.00	ECG	Test Project	Client Work Services

Signature Signature

Client Name Date Case Manager Date

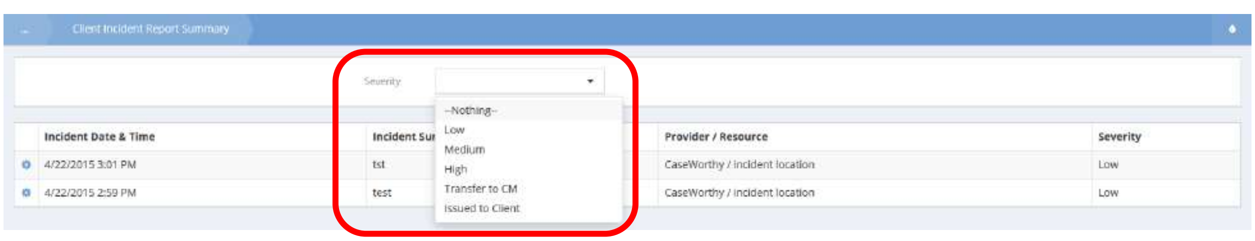
Timesheet Page 1 of 1

Client Incidents



The Client Incidents Report Summary displays a list of incidents the current client has been involved with.

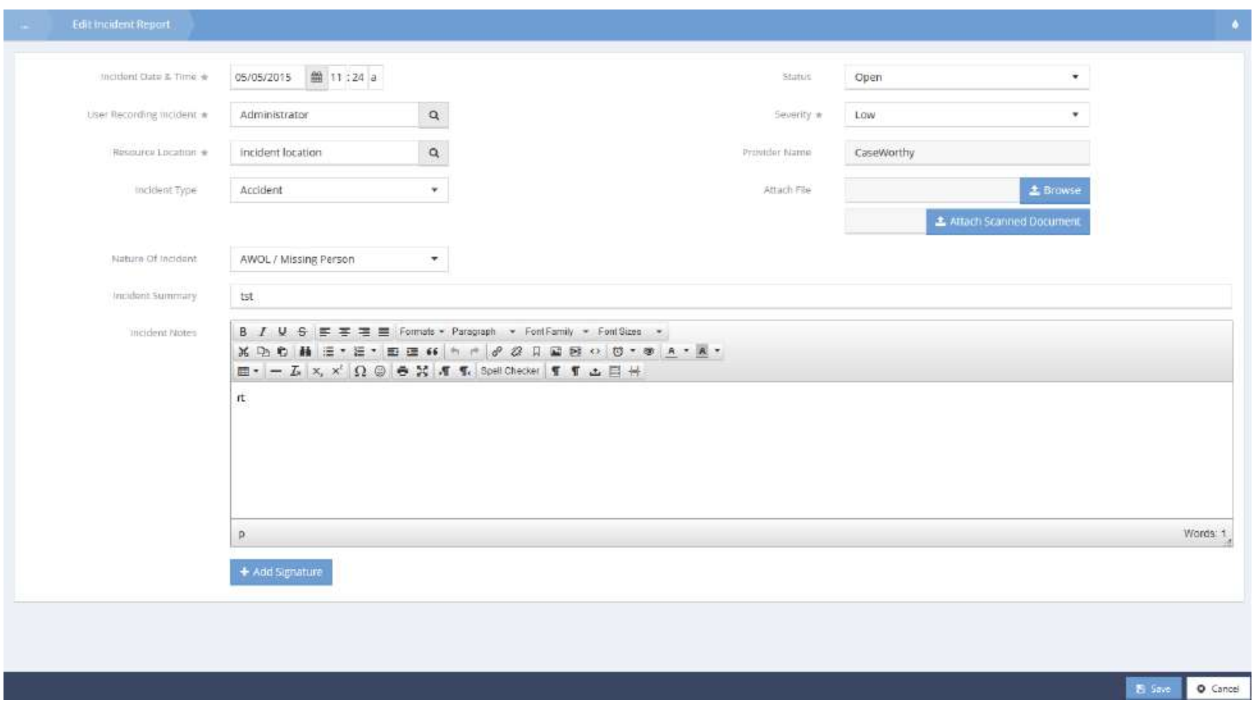
Incidents may be filtered by severity by using the Severity drop-down list.



To view clients involved, staff involved, or submitted images, click the action gear and click the relevant items in the menu.

To edit an incident, click the action gear and click Edit. The Edit Incident Report form displays.

Make any changes and click Save when finished.

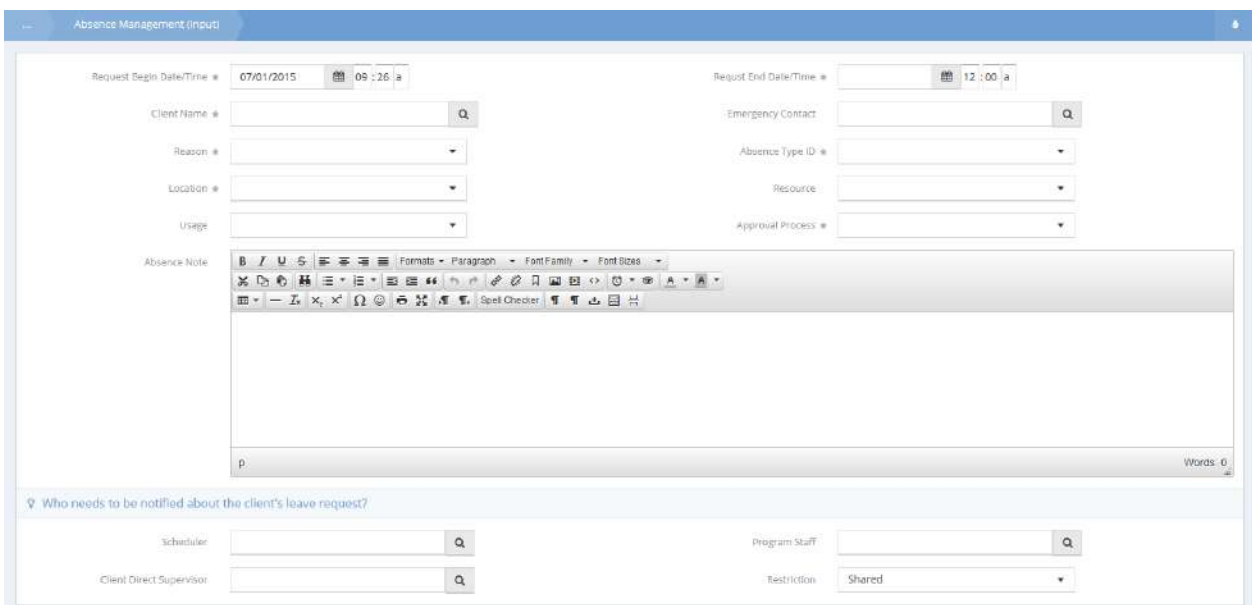


Excused Absence

View Approval History

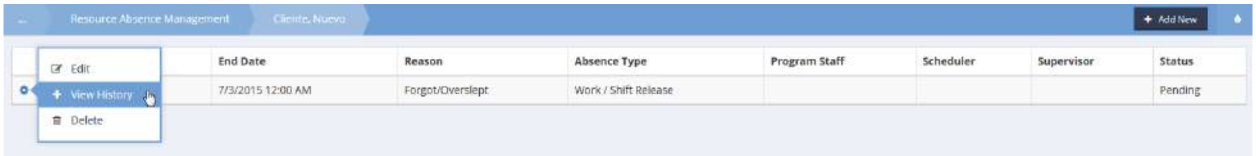
Objective: View the history of excused absence approval requests.

To create a new excused absence request, click the **+ Add New** button. The Absence Management (Input) form displays.



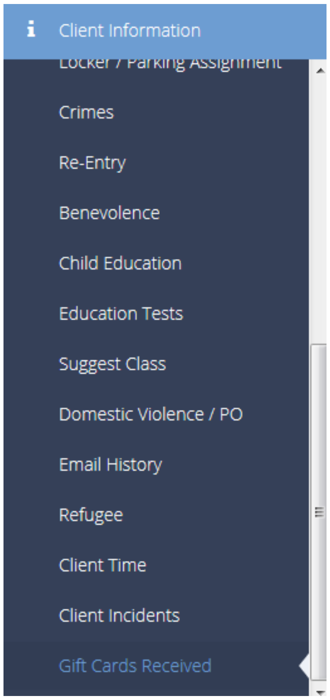
Select a client using the Client Name lookup, enter an end date/time and enter the desired information for each drop-down list. Enter notes if desired. Click the **Save** button when finished. To view the history of a request, click the action gear icon and click View History.

The View Approval History form displays.

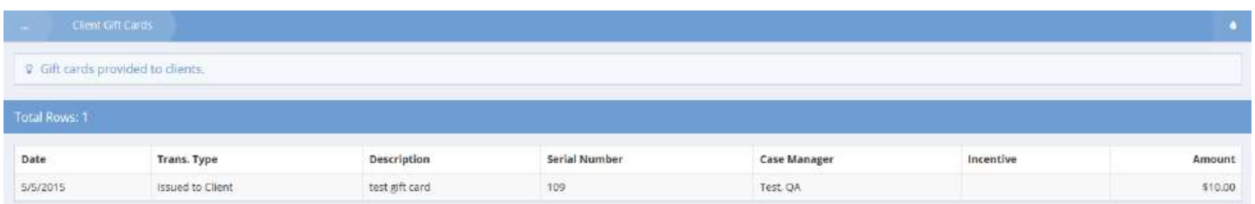


All status changes related to the request display in the spreadsheet.

Gift Cards Received



The Client Gift Cards form displays a list of gift cards that have been issued to the selected client.



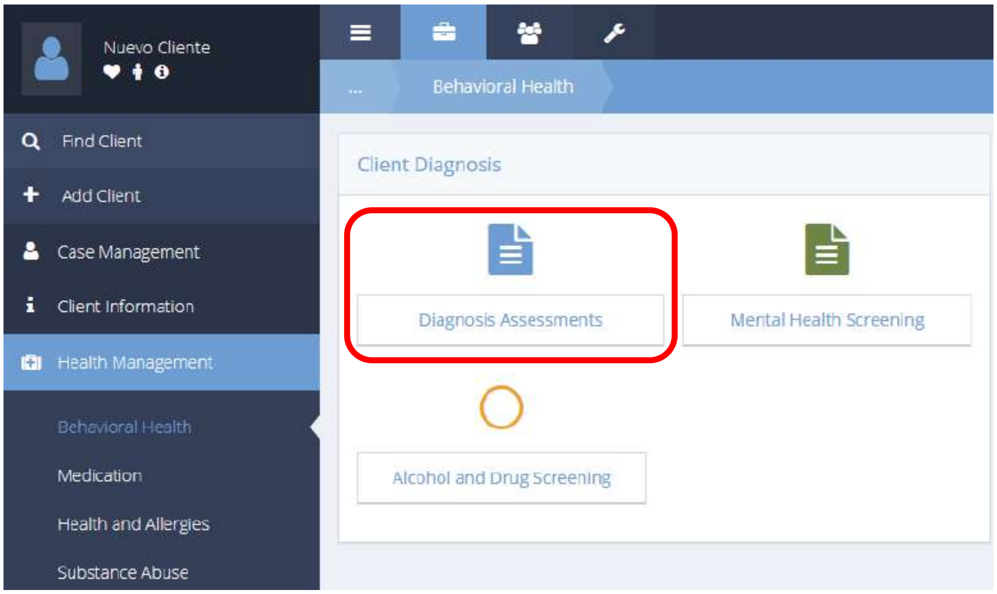
Date	Trans. Type	Description	Serial Number	Case Manager	Incentive	Amount
5/5/2015	Issued to Client	test gift card	109	Test, QA		$10.00

Health Management

Behavioral Health

Mental Health Diagnosis

Objective: Complete a Mental Health Diagnosis.

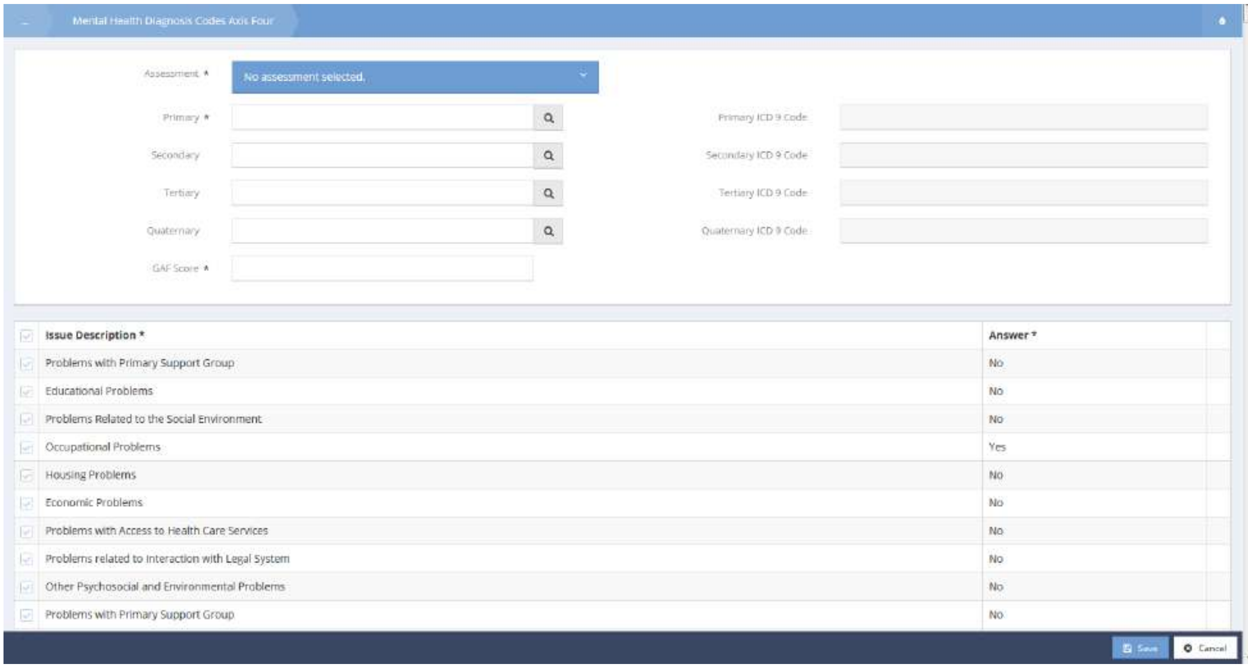


Click the Diagnosis Assessments icon. The Mental Health Diagnosis Summary form displays.

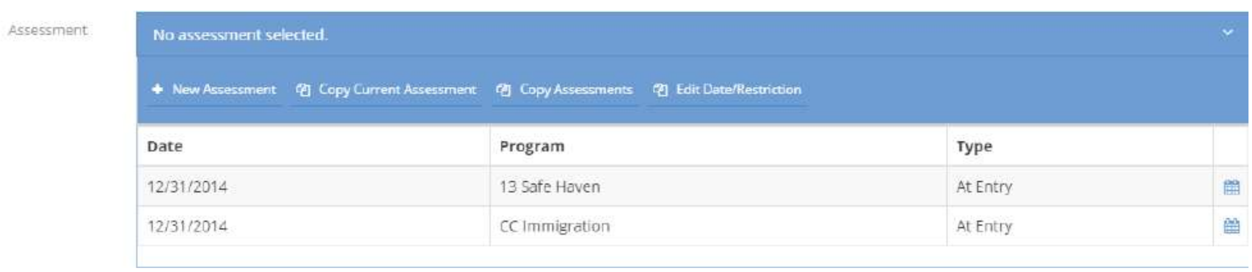
	Assessment Date	Program	Assessment Event	Primary Diagnosis	Secondary Diagnosis	Tertiary Diagnosis	Quaternary Diagnosis	GAF Score	Axis 4
	12/31/2014	CC Immigration	At Entry	290.12				0	
	1/6/2015	13 Safe Haven	During	100.01				0	

To add a new assessment, click on + Add New button.

The Mental Health Diagnosis Codes Axis Four form displays.



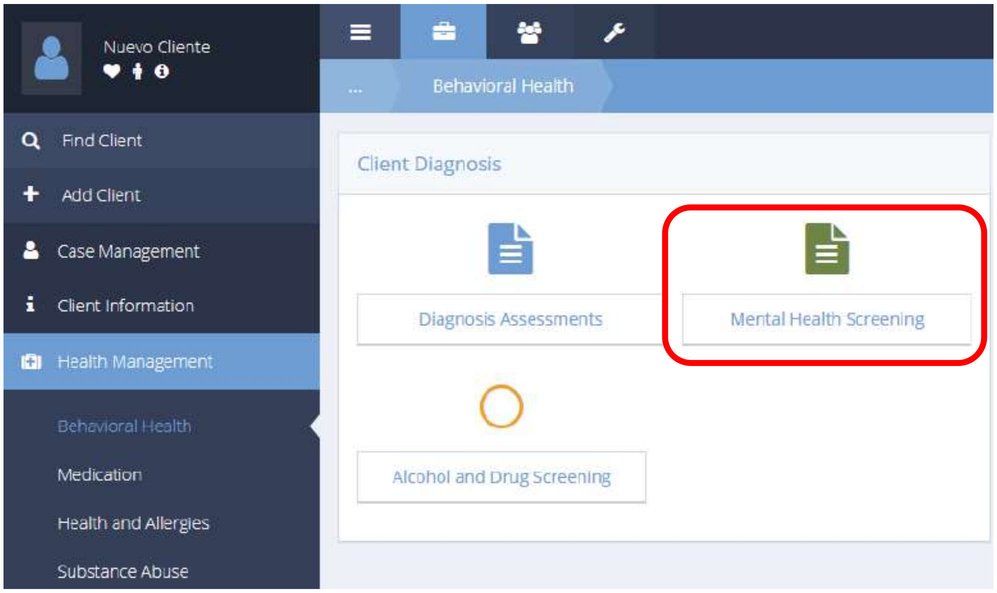
To select an assessment or begin a new assessment, click on the No assessment selected. area of the Assessment field. The field expands to list existing assessments.



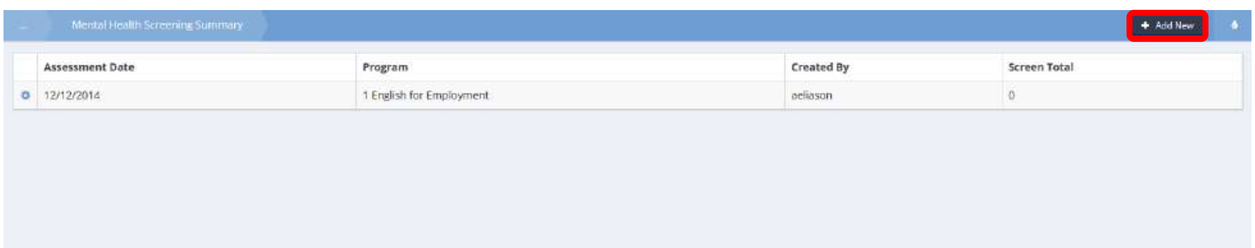
Once the existing assessment is selected or a new assessment is started, answer all the assessment questions and click Save when finished.

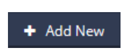
Mental Health Screening

Objective: Complete a Mental Health Screening Assessment.



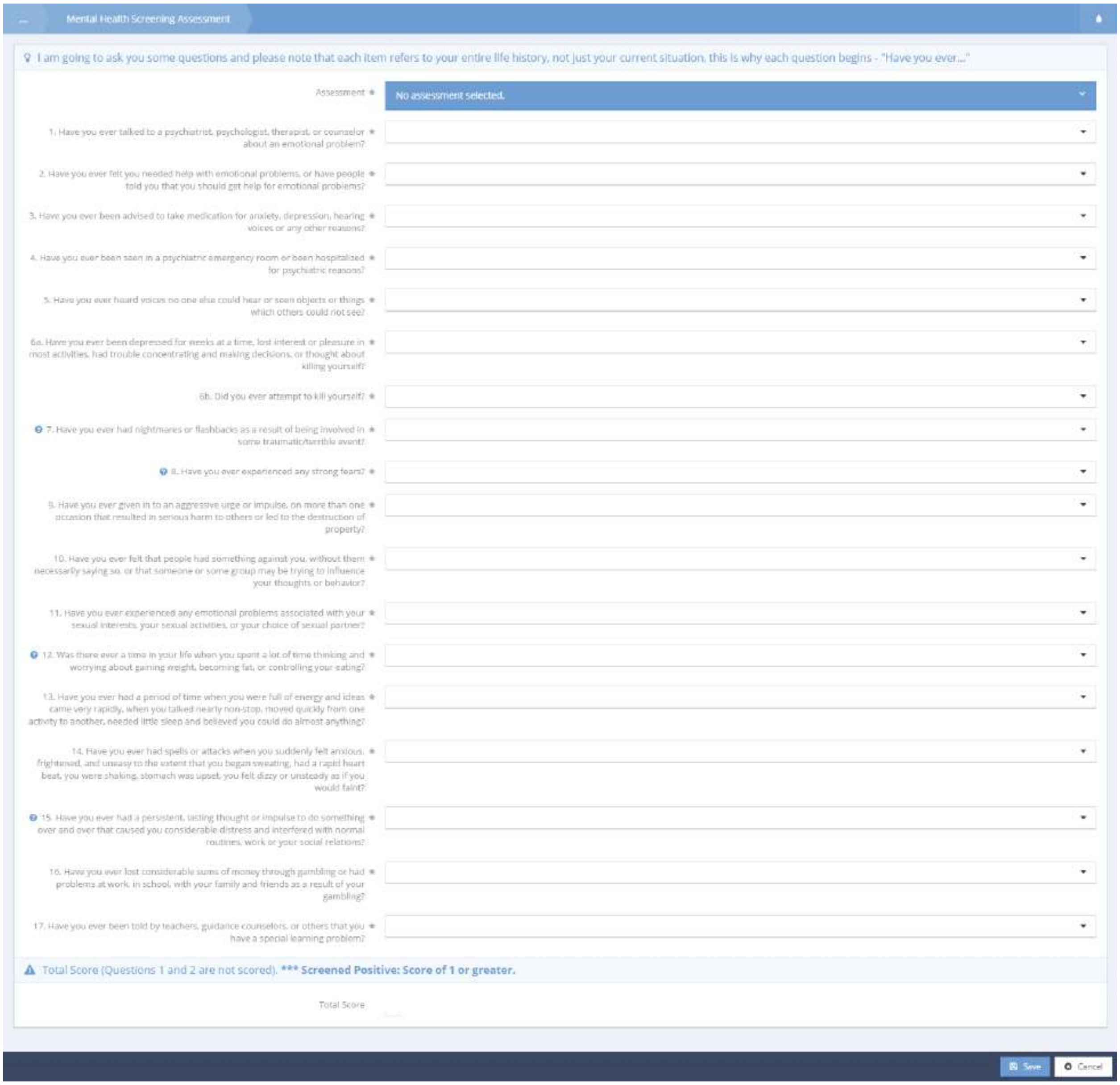
Click the Mental Health Screening icon. The Mental Health Screening Summary form displays.



To create a new Mental Health assessment, click the 

button.

The Mental Health Screening Assessment form displays.


Mental Health Screening Assessment

I am going to ask you some questions and please note that each item refers to your entire life history, not just your current situation, this is why each question begins - "Have you ever..."

Assessment * No assessment selected.

1. Have you ever talked to a psychiatrist, psychologist, therapist, or counselor about an emotional problem? *

2. Have you ever felt you needed help with emotional problems, or have people told you that you should get help for emotional problems? *

3. Have you ever been advised to take medication for anxiety, depression, hearing voices or any other reasons? *

4. Have you ever been seen in a psychiatric emergency room or been hospitalized for psychiatric reasons? *

5. Have you ever heard voices no one else could hear or seen objects or things which others could not see? *

6a. Have you ever been depressed for weeks at a time, lost interest or pleasure in most activities, had trouble concentrating and making decisions, or thought about killing yourself? *

6b. Did you ever attempt to kill yourself? *

7. Have you ever had nightmares or flashbacks as a result of being involved in some traumatic/terrible event? *

8. Have you ever experienced any strong fears? *

9. Have you ever given in to an aggressive urge or impulse, on more than one occasion that resulted in serious harm to others or led to the destruction of property? *

10. Have you ever felt that people had something against you, without them necessarily saying so, or that someone or some group may be trying to influence your thoughts or behavior? *

11. Have you ever experienced any emotional problems associated with your sexual interests, your sexual activities, or your choice of sexual partner? *

12. Was there ever a time in your life when you spent a lot of time thinking and worrying about gaining weight, becoming fat, or controlling your eating? *

13. Have you ever had a period of time when you were full of energy and ideas came very rapidly, when you talked nearly non-stop, moved quickly from one activity to another, needed little sleep and believed you could do almost anything? *

14. Have you ever had spells or attacks when you suddenly felt anxious, frightened, and uneasy to the extent that you began sweating, had a rapid heart beat, you were shaking, stomach was upset, you felt dizzy or unsteady as if you would faint? *

15. Have you ever had a persistent, lasting thought or impulse to do something over and over that caused you considerable distress and interfered with normal routines, work or your social relations? *

16. Have you ever lost considerable sums of money through gambling or had problems at work, in school, with your family and friends as a result of your gambling? *

17. Have you ever been told by teachers, guidance counselors, or others that you have a special learning problem? *

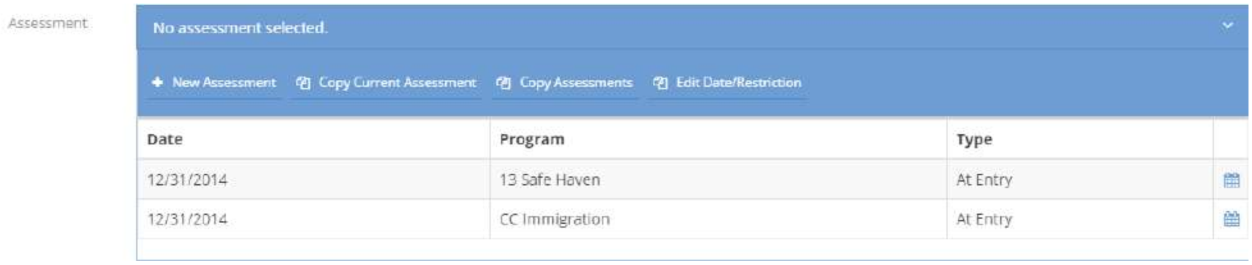
Total Score (Questions 1 and 2 are not scored). ***** Screened Positive: Score of 1 or greater.**

Total Score

Save Cancel

To select an assessment or begin a new assessment, click on the No assessment selected. area of the Assessment field.

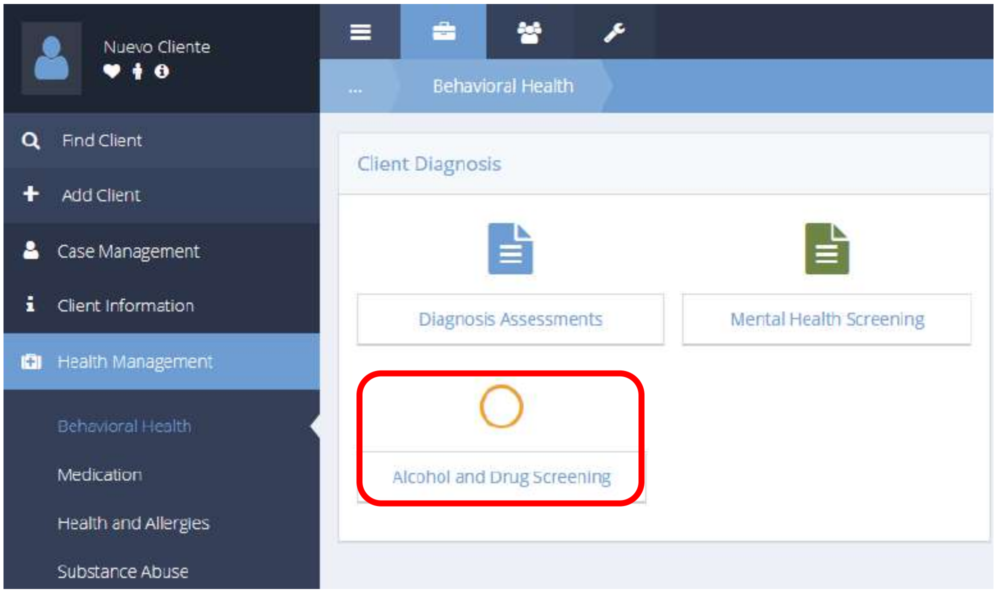
The field expands to list existing assessments.



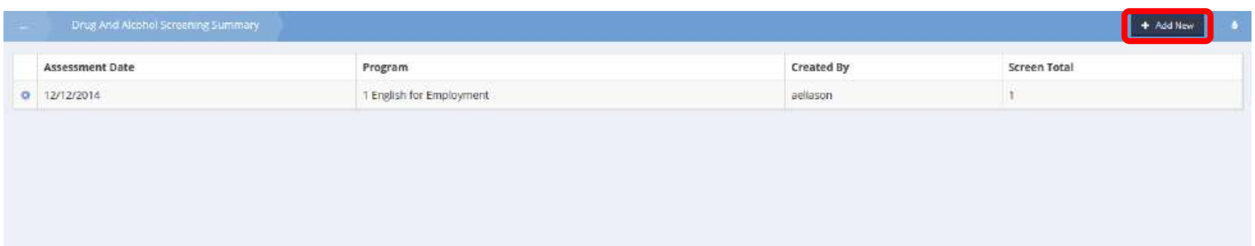
Once the existing assessment is selected or a new assessment is started, answer all the assessment questions. The "Total Score" field auto-populates based upon the answers provided on the form. Click on the  button when finished.

Alcohol and Drug Screening

Objective: Complete an Alcohol and Drug Screening Assessment.

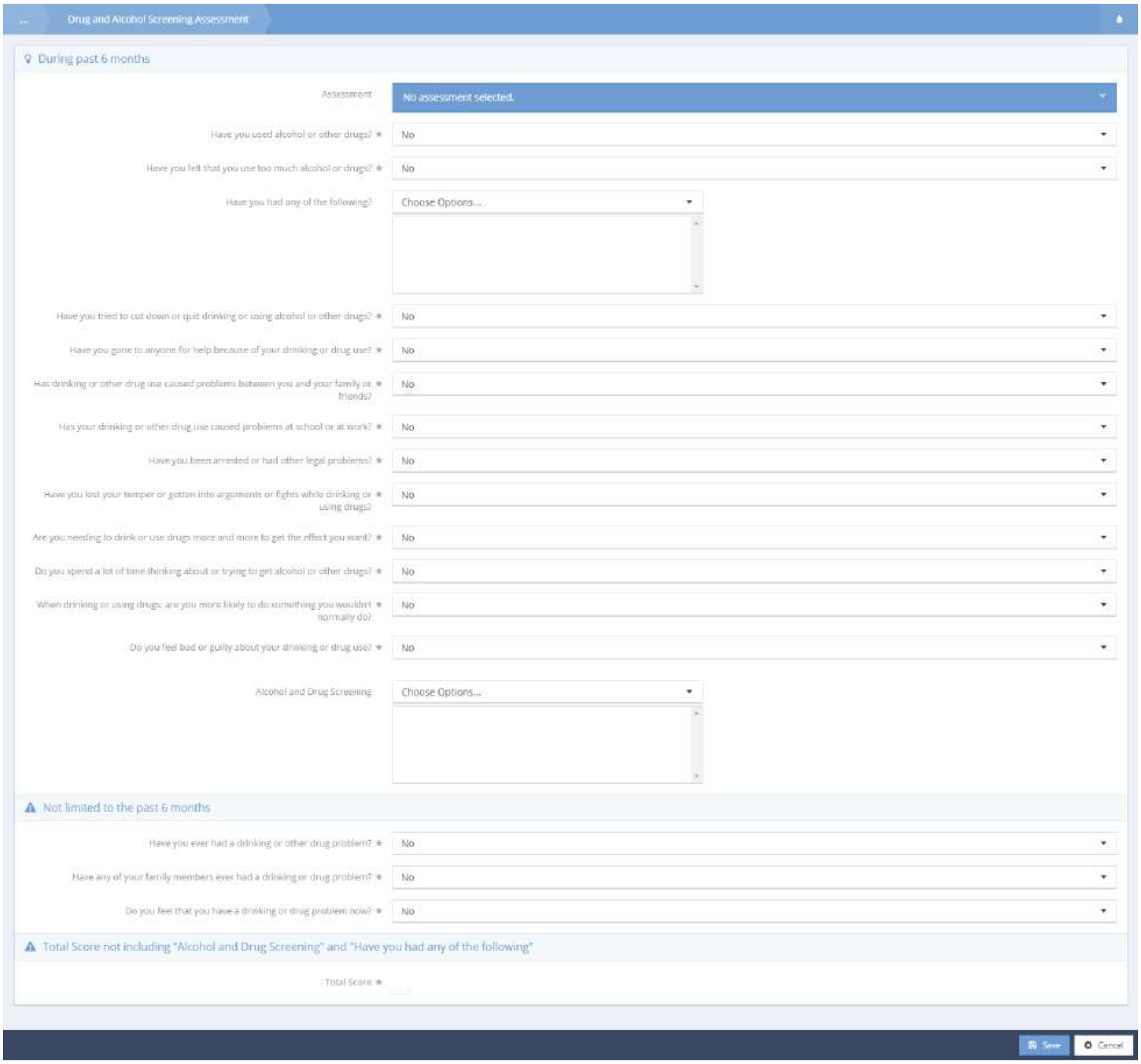


Click the Alcohol and Drug Screening icon. The Drug and Alcohol Screening Summary form displays.



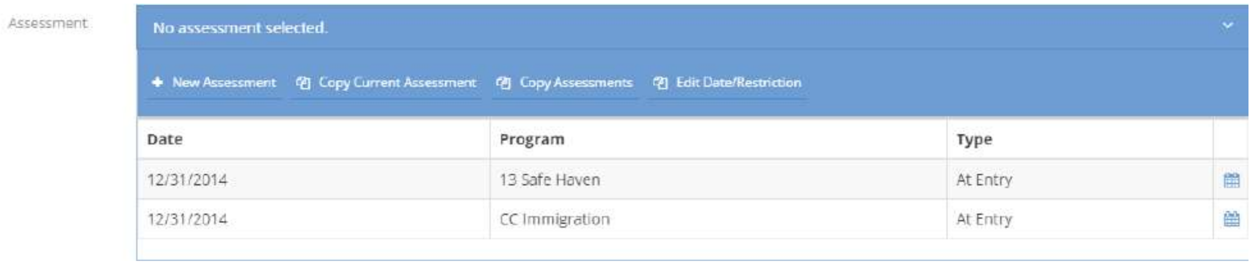
Click the Add New button.

The Drug and Alcohol Screening Assessment form displays.



To select an assessment or begin a new assessment, click on the No assessment selected. area of the Assessment field.

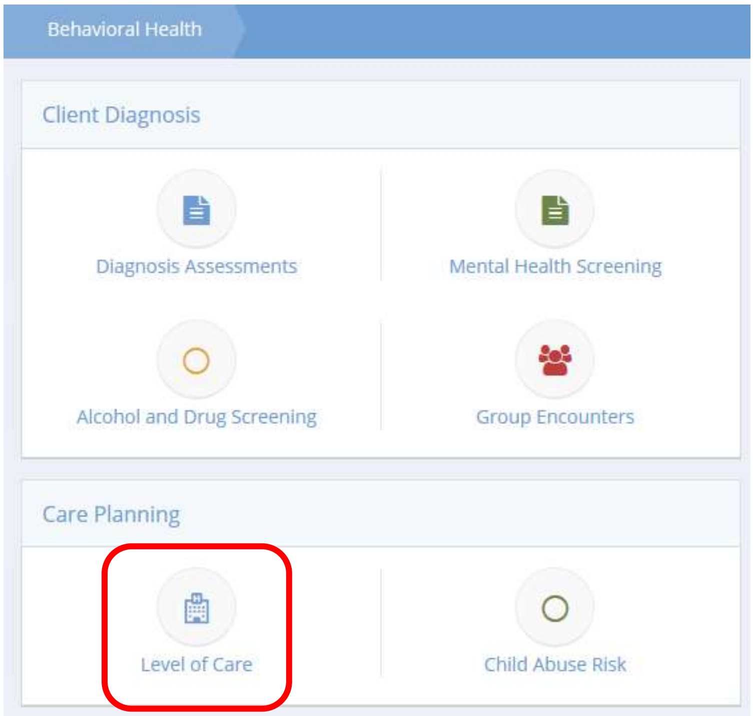
The field expands to list existing assessments.



Once an existing assessment is selected or a new assessment is started, answer all the assessment questions. Click on the drop-down arrow icon for the multi-select boxes and click on the checkbox for all applicable answers. Click on the Add Selected button to continue. The "Total Score" field auto populates based upon the answers provided on the form. Click on the Save button when finished.

Level of Care Assessment Summary

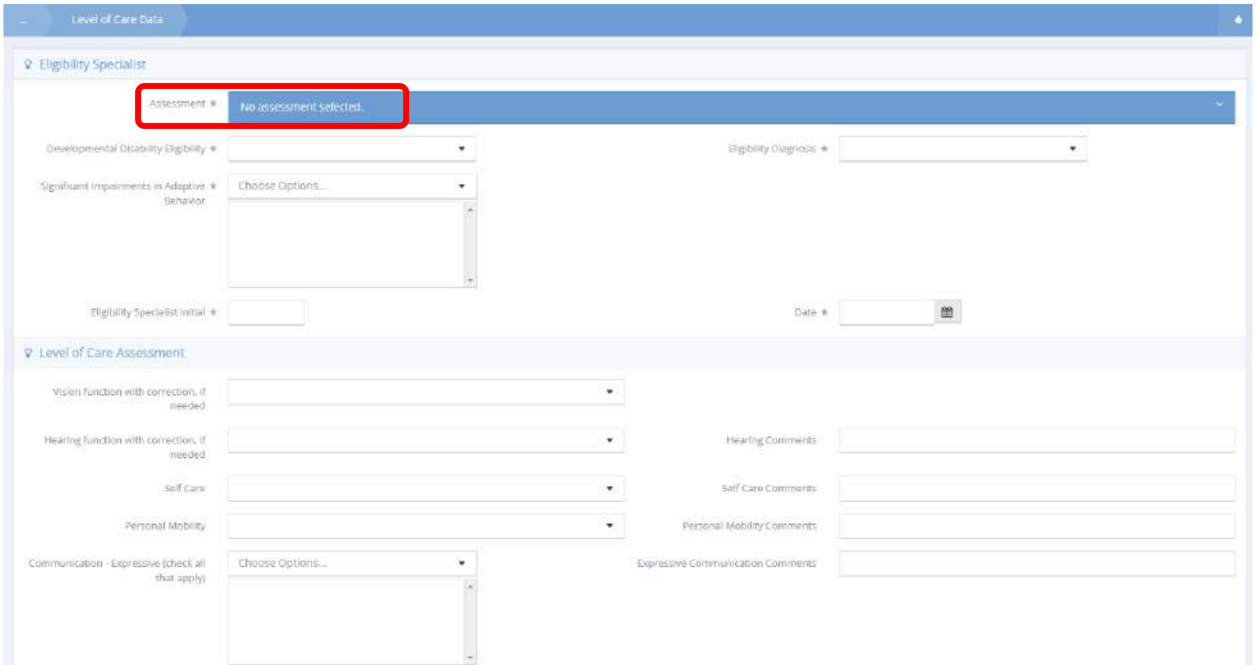
Objective: Manage assessments for level of care.



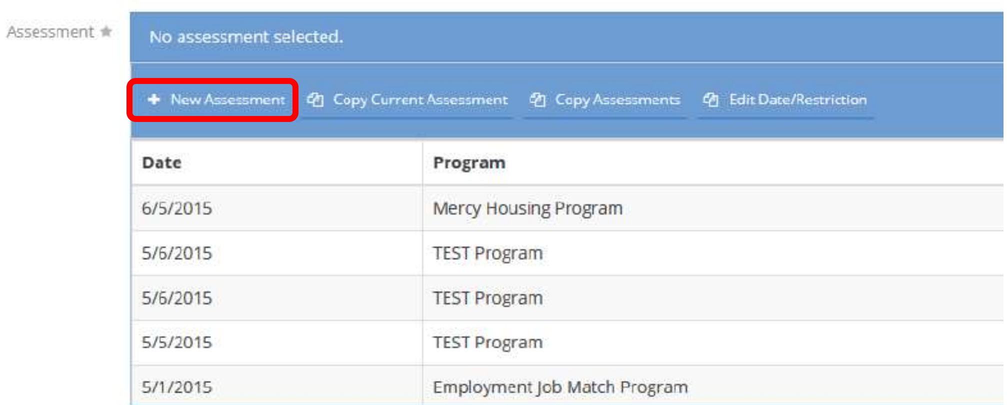
Click the icon for Level of Care. The Level of Care Assessment Summary displays.

To add a new assessment, click the Add New button. To edit an existing assessment, click the action gear icon and click Edit.

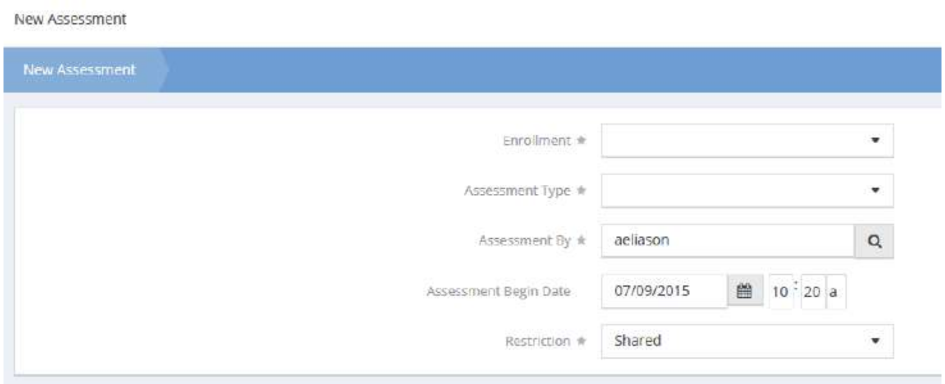
Whether creating a new assessment or editing, the Level of Care Data form displays. Click the No assessment selected. area.



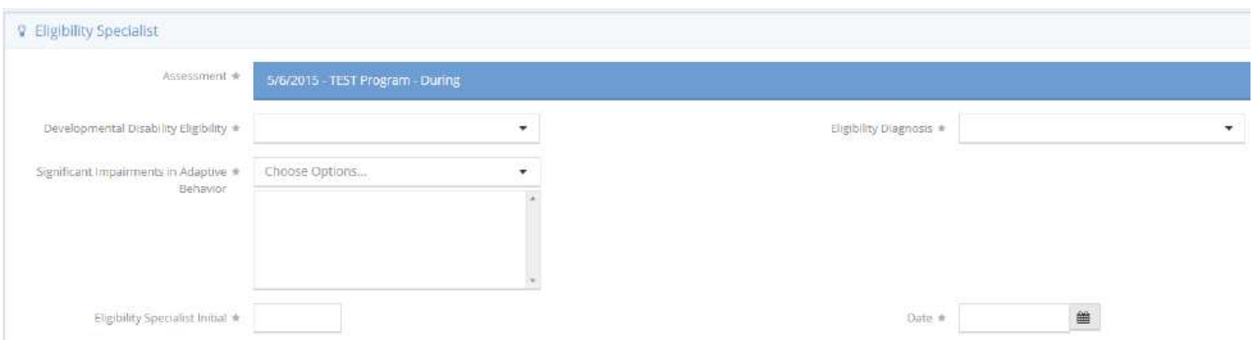
The field expands. Select an existing assessment or click the New Assessment button.



The New Assessment form displays.

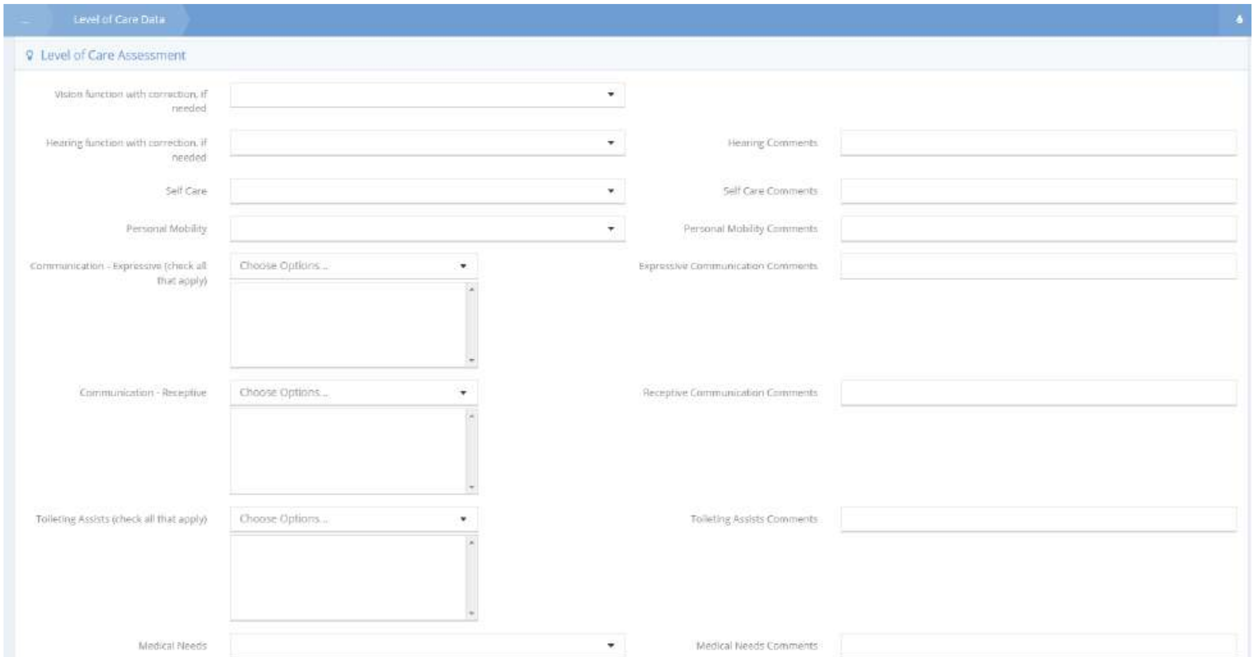


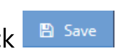
If starting a new assessment, select an enrollment and assessment type from the drop-down lists and click the Save button.



After an assessment has been selected, select a disability eligibility, eligibility diagnosis and impairments in adaptive behavior from the drop-down lists. Enter specialist initials and date in the proper fields.

The next part of the assessment, Level of Care Assessment, displays.



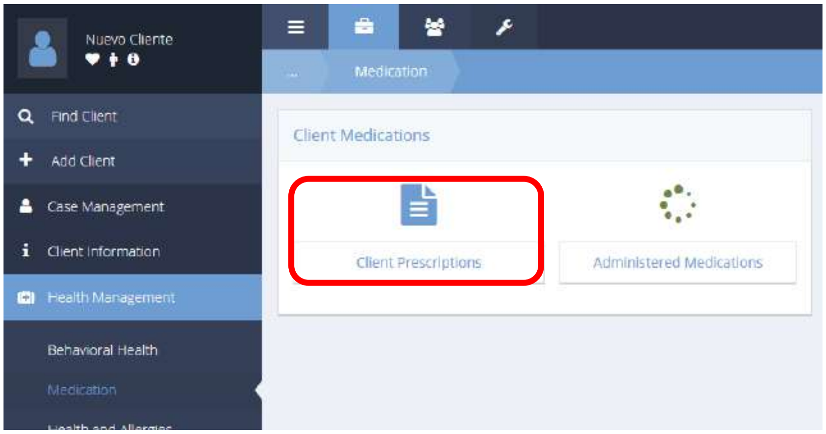
Complete the rest of the assessment, filling each field with the desired selections and data. Click 

when finished.

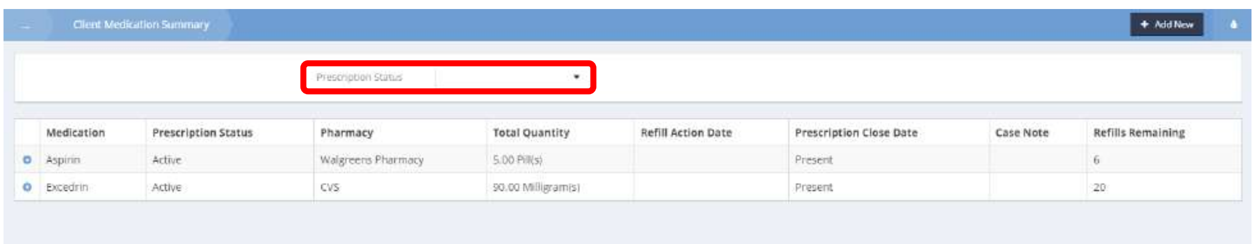
Medication

Client Prescriptions

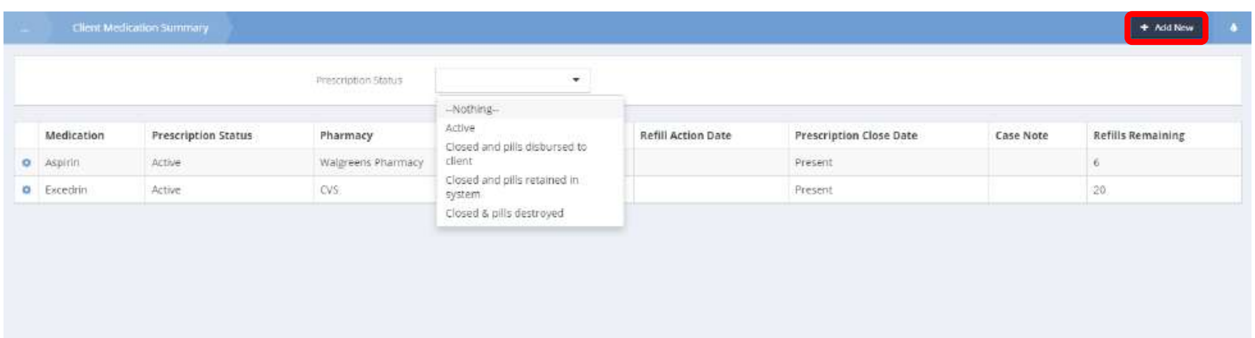
Objective: Manage client prescriptions. Includes adding new prescriptions, editing existing prescriptions, and managing refills.

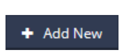


Click the Client Prescriptions icon. The Client Medication Summary form displays.



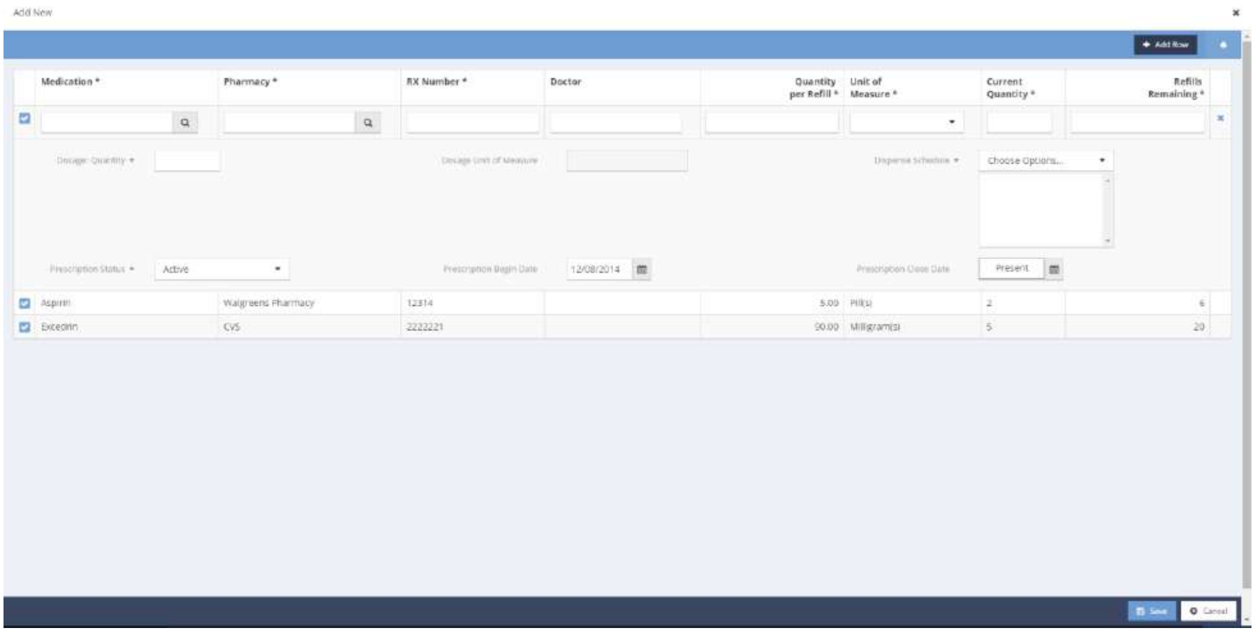
Click the Prescription Status dropdown box to filter to a specific status.



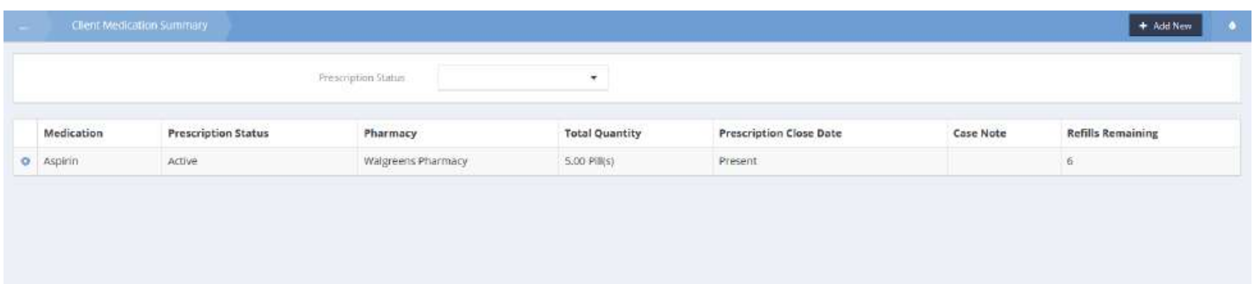
To add a new prescription, click the 

button.

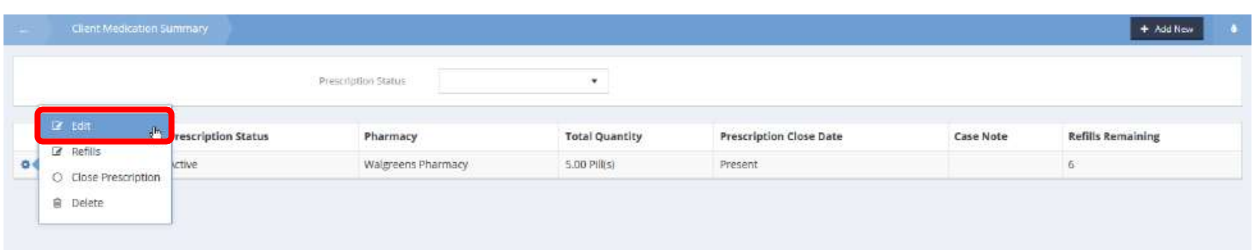
The Add Client Prescription form displays.



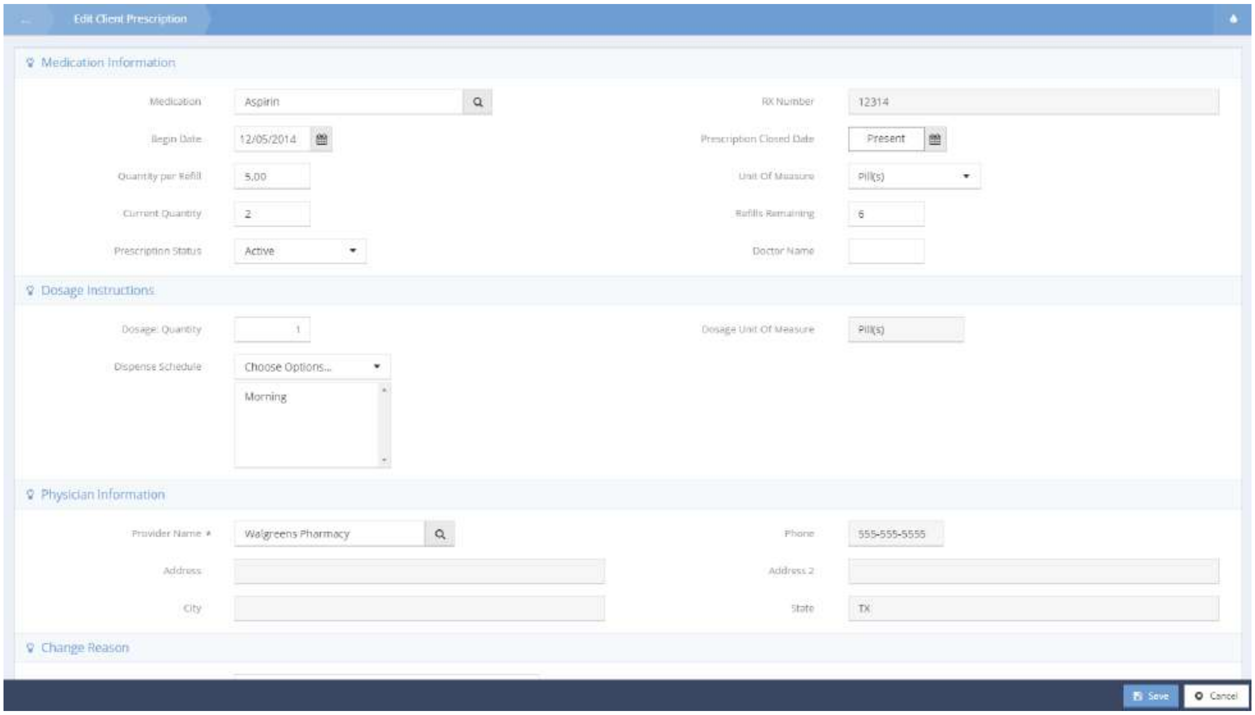
Fill out all required information and click Save when finished. The Client Medication Summary form displays.

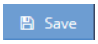


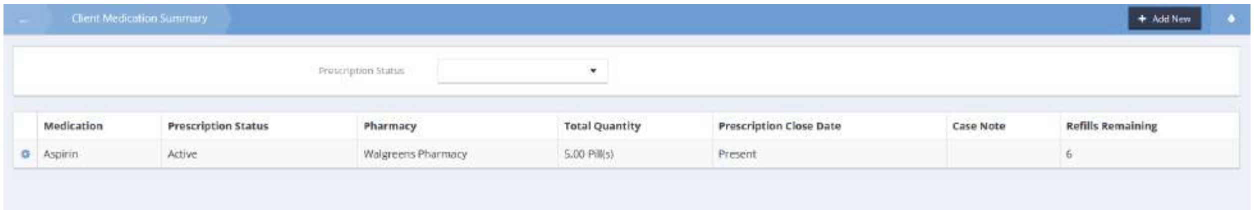
To edit a prescription, click the action gear icon associated with it and select Edit from the pop up menu that appears



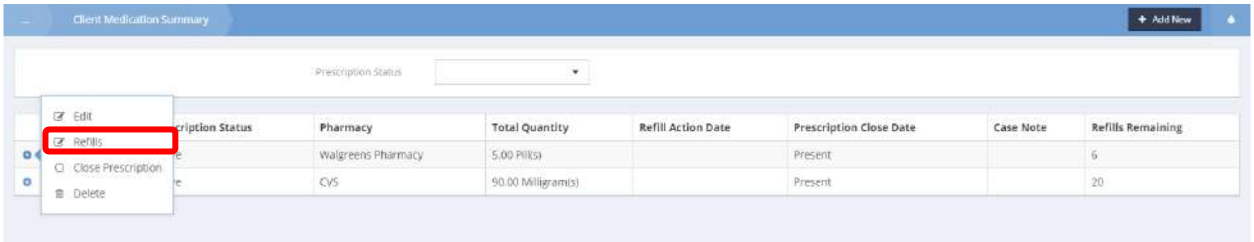
The Client Prescription Edit form displays.



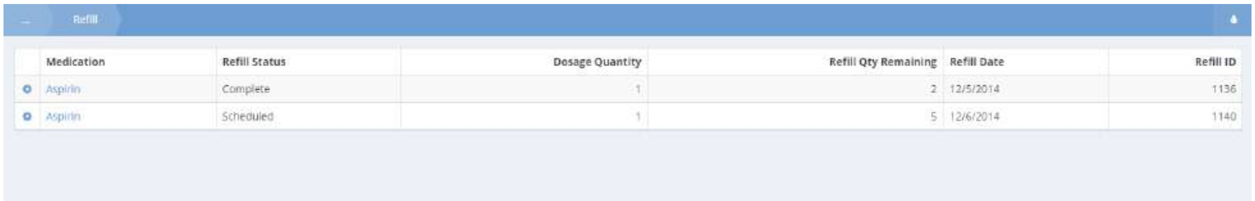
Make any necessary changes and click  when finished. The Client Medication Summary form displays.



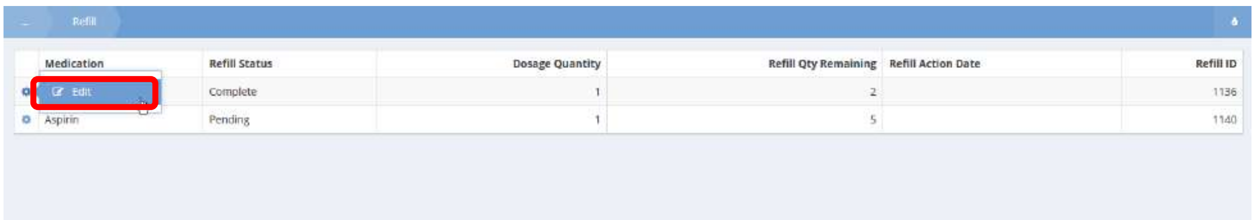
To view refills, click the action gear  icon associated with it and select Refills from the pop up menu that appears.



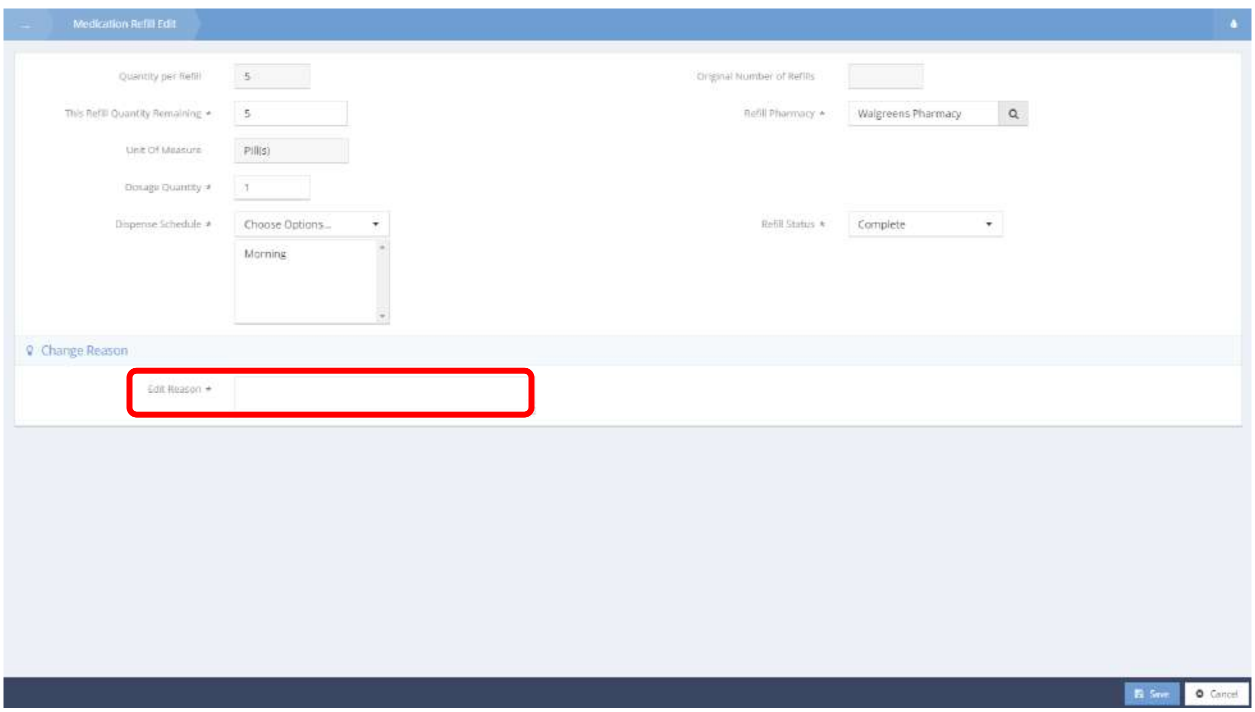
The Refill form displays.



To edit a refill, click the action gear icon associated with it and select Edit. From the pop up menu that appears.



The Medication Refill Edit form displays.

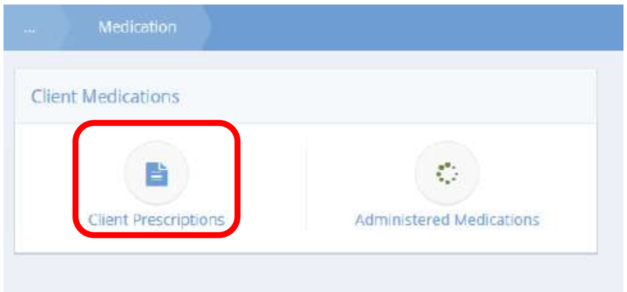


Make any necessary changes and enter a reason for the edit. Click Save when finished.

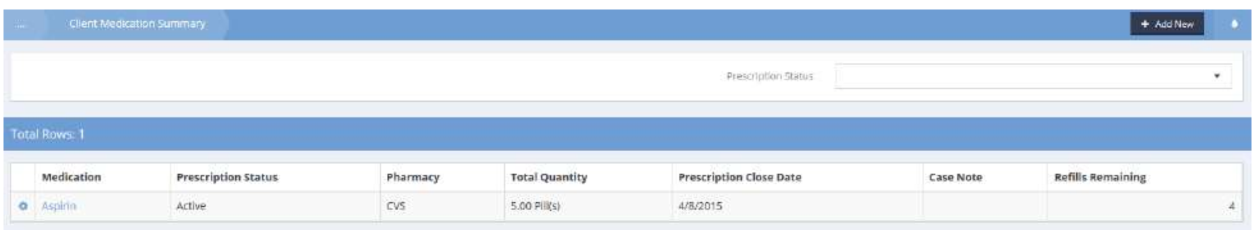
Medication Edit

Objective: Add or make changes to client medication records.

Click on the Client Prescriptions icon in the Medication window.



The Client Medication Summary form displays. Locate the desired medication and click on the action gear associated with it.

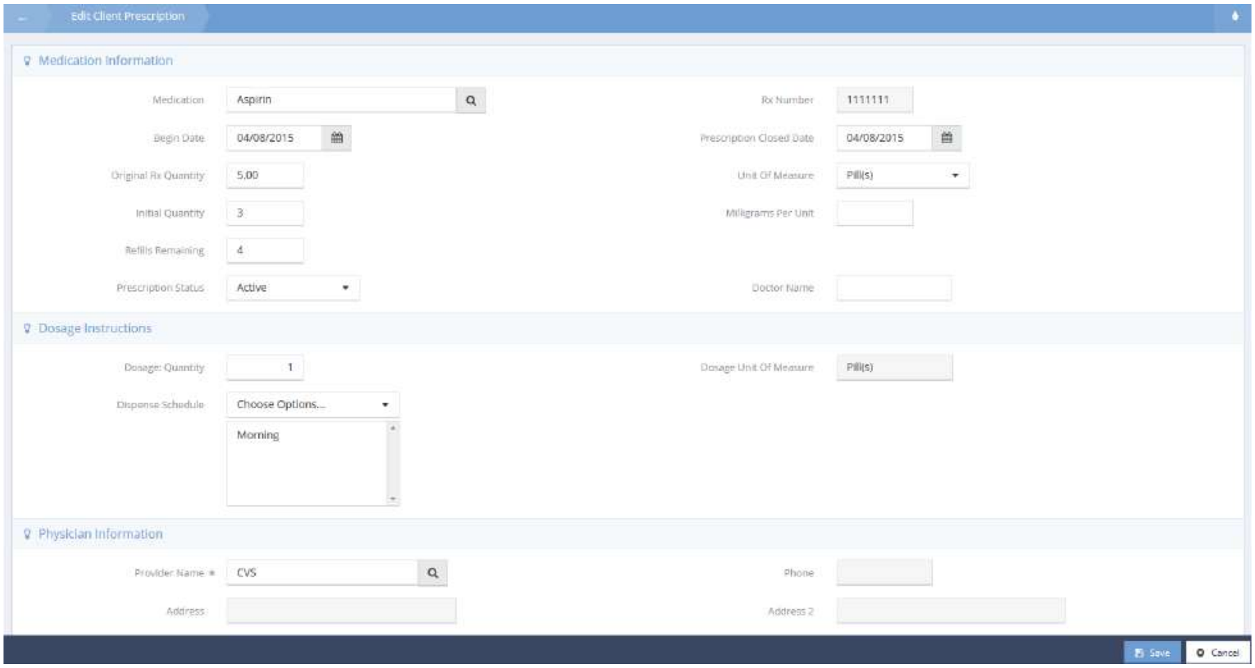


Select Edit from the pop-up menu that appears.

The Medication Edit form displays.

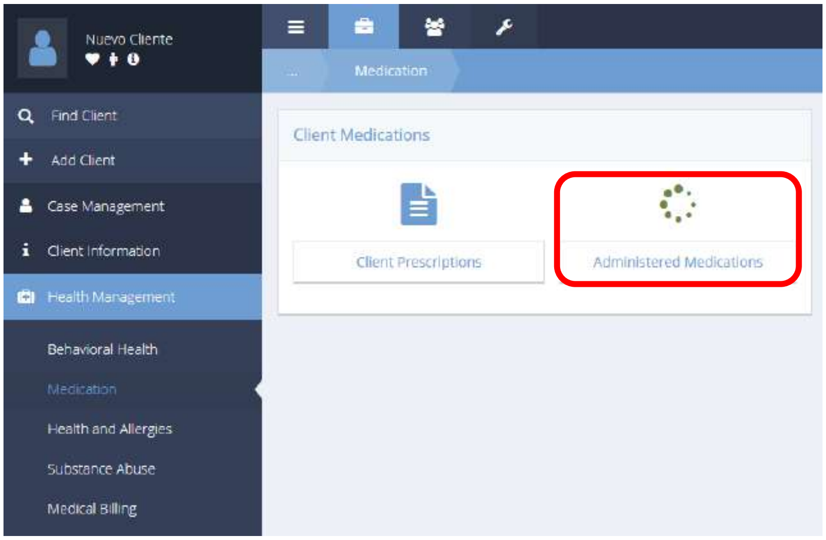
Make any desired changes and click on the 

button.

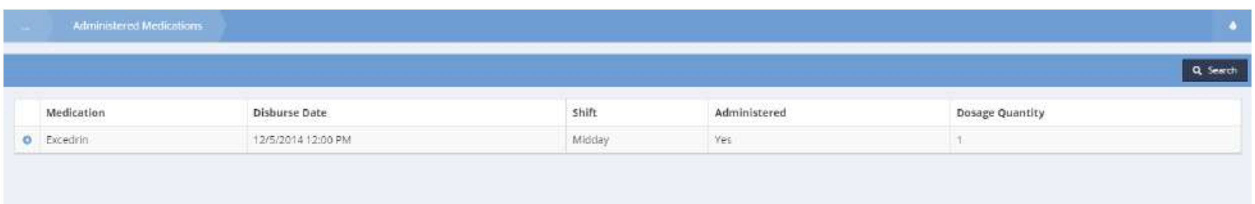


Administered Medications

Objective: View and edit medications that have been administered to a client.

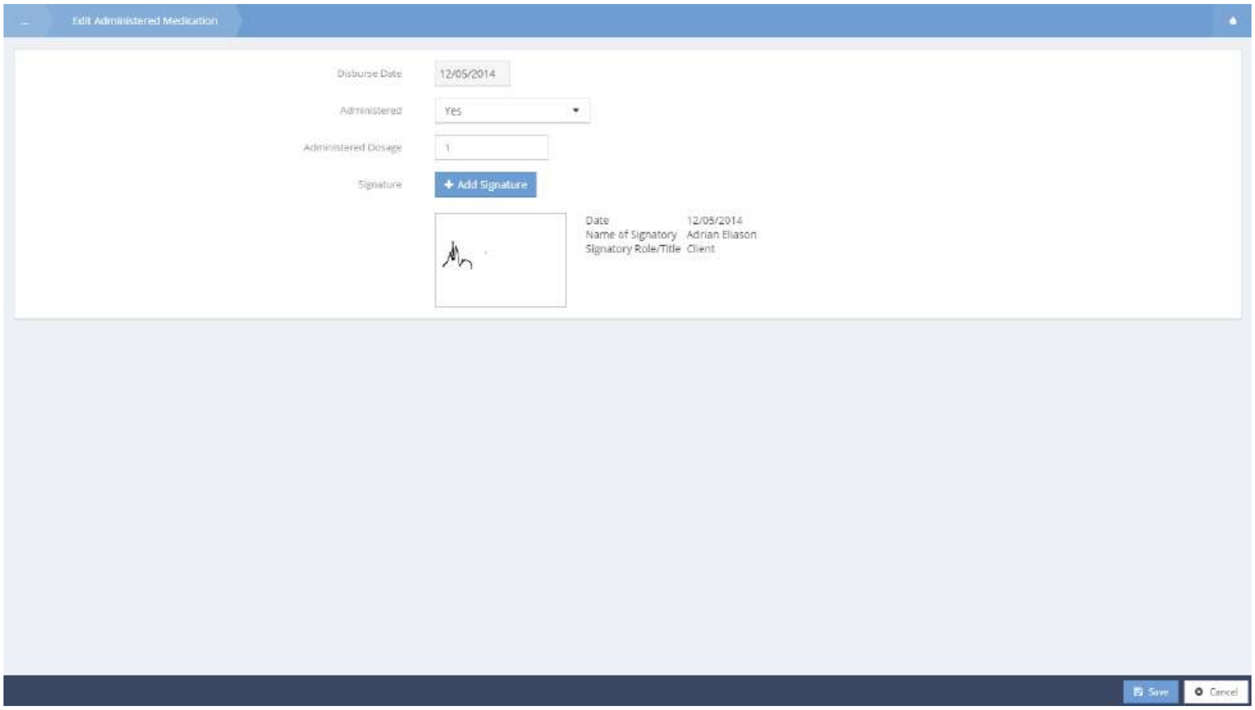


Click the Administered Medications icon. The Administered Medications form displays.



Click the action gear and click Edit to edit a previously administered medication.

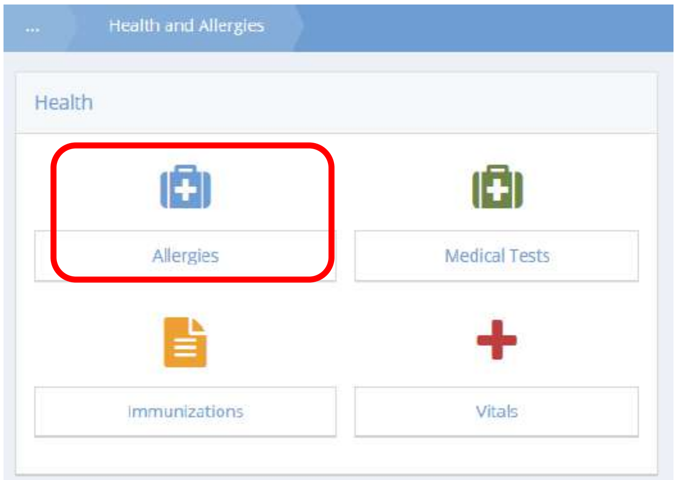
The Edit Administered Medication form displays.



Make any necessary changes and click on the Save button. Click Done when finished editing.

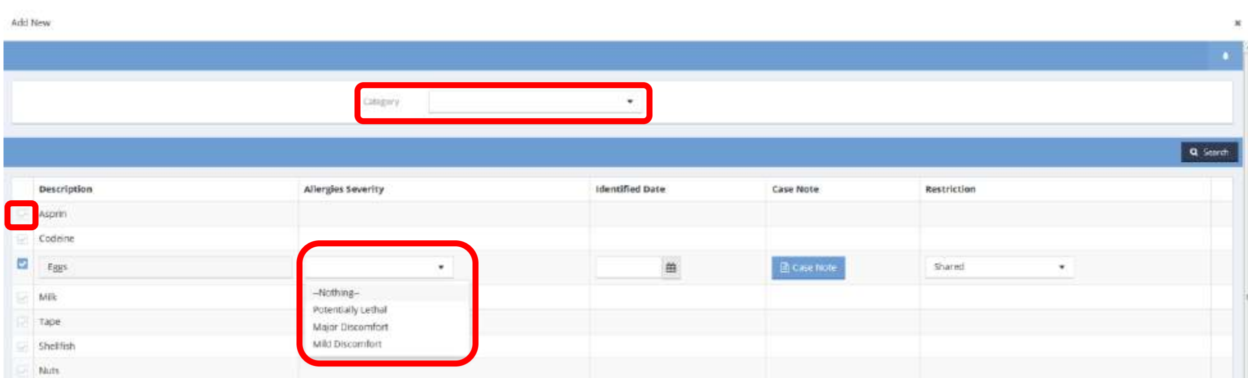
Health and Allergies

Allergies



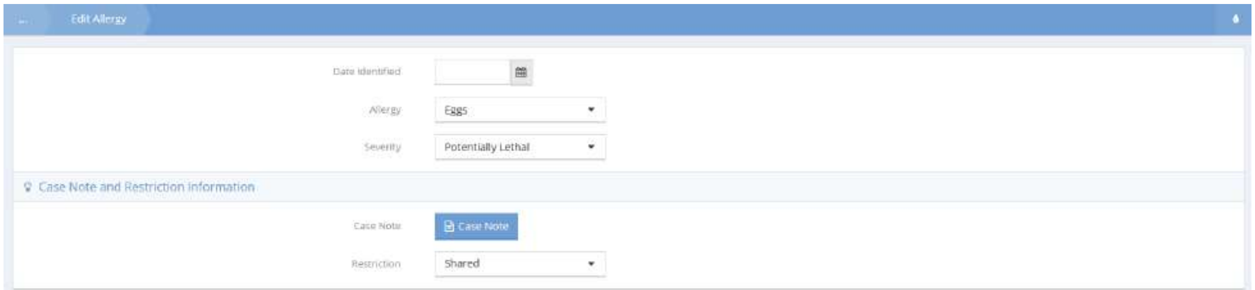
The Allergy form allows users to track allergies. To add an allergy, click the Add New button.

Use the Category drop-down list to filter the list of allergies. To add the desired allergy, click the clear checkbox and select the severity from the drop-down list. Click the Save button when finished.



To edit a previously added allergy, click the action gear and click Edit.

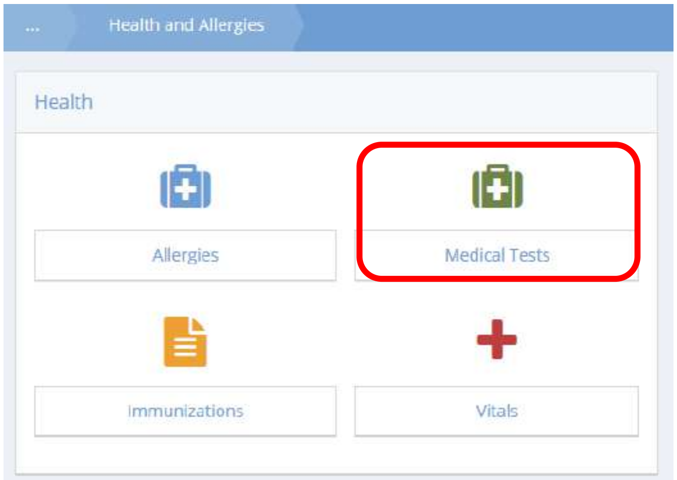
The Edit Allergy form displays.



Make any desired changes and click 

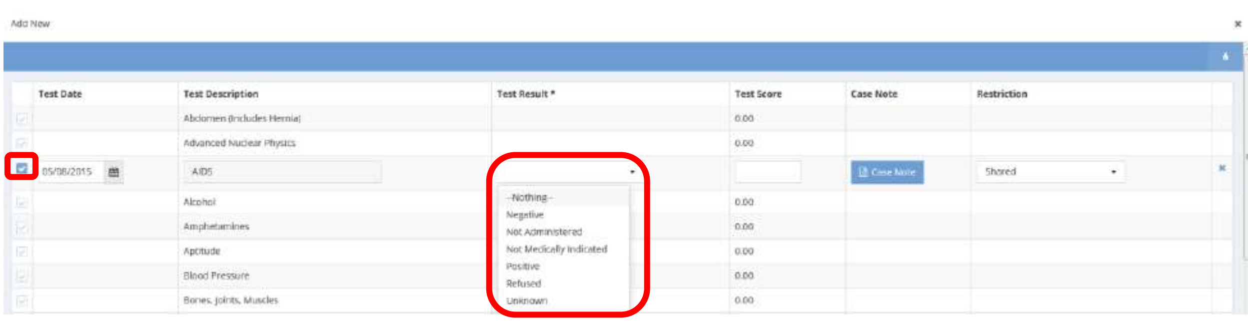
when finished.

Medical Tests



The Medical Tests form allows the tracking of medical tests. To create a new test record, click the Add New button.

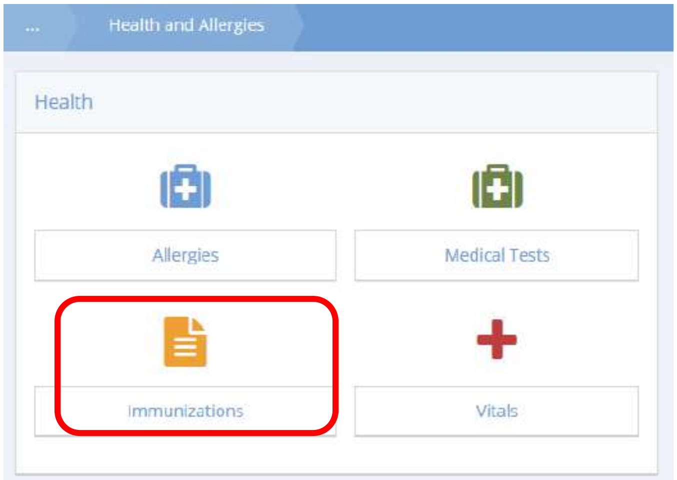
To add a test, click the clear checkbox and select a result from the drop-down list. Enter a score if applicable. Click the Save button when finished.



To edit a previously entered test, click the action gear and click Edit. The Edit Test Results form displays.

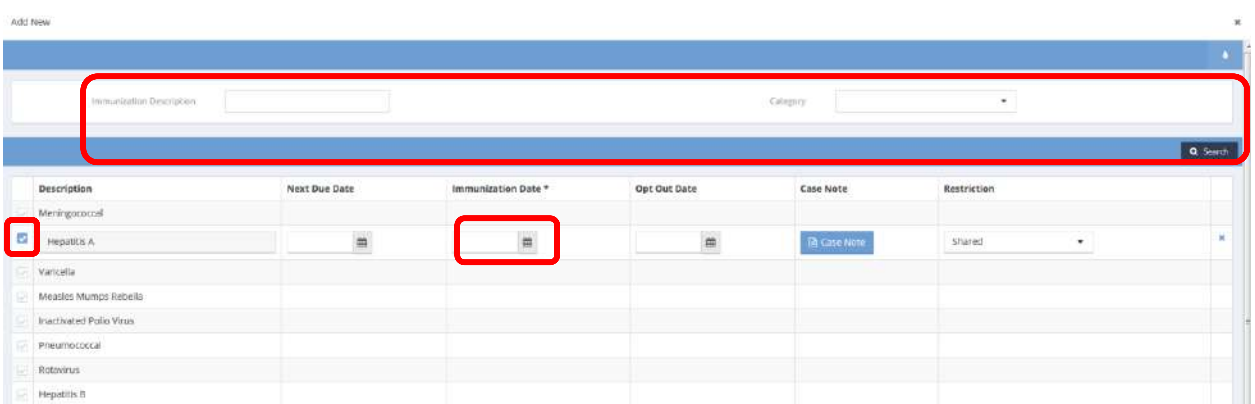
Make any changes and click  when finished.

Immunizations



The Immunizations form allows users to track a history of immunizations. To add an immunization, click the **+ Add New** button.

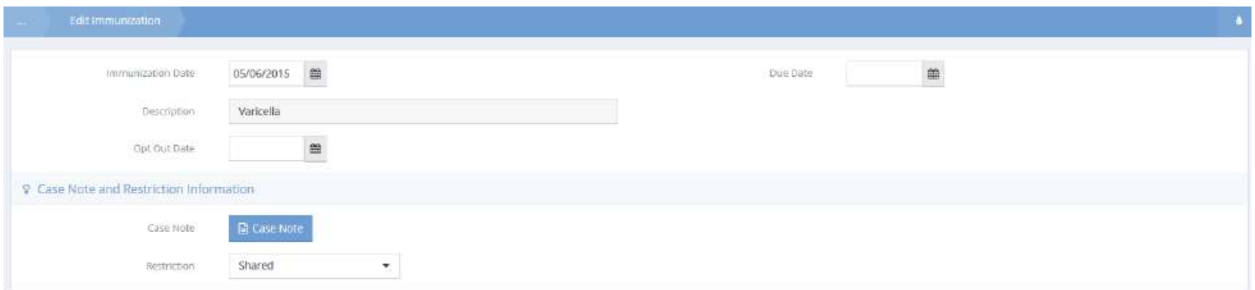
Use the search bar to filter the list of immunizations. To add an immunization, click the clear checkbox and enter a date. Click the **Save** button when finished.



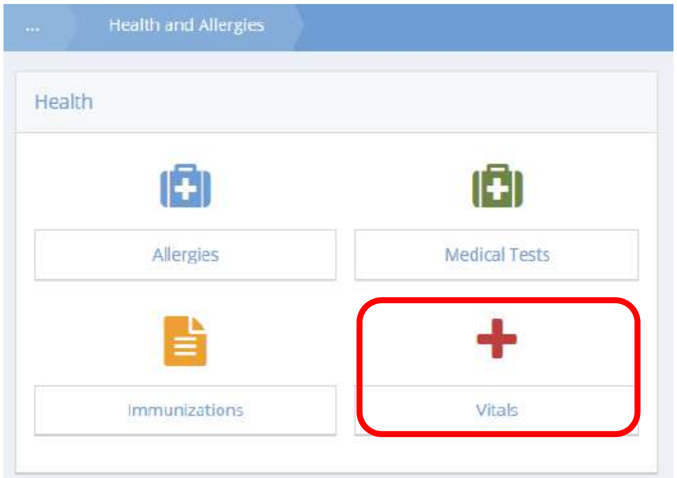
To edit an existing immunization entry, click the action gear and click Edit.

The Edit Immunization form displays.

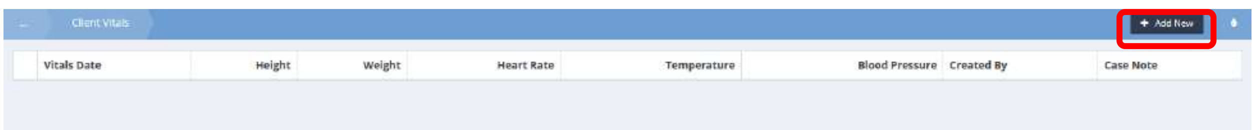
Make any changes and click Save when finished.



Vitals

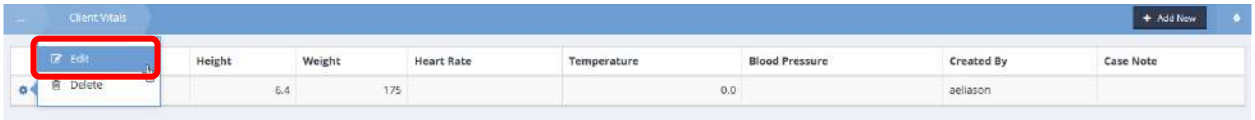


The Vitals form allows users to track and maintain a history of various vital sign measurements. To make a new entry, click the + Add New button.



Enter the date, height weight, and any other available information. Click the Save button when finished.

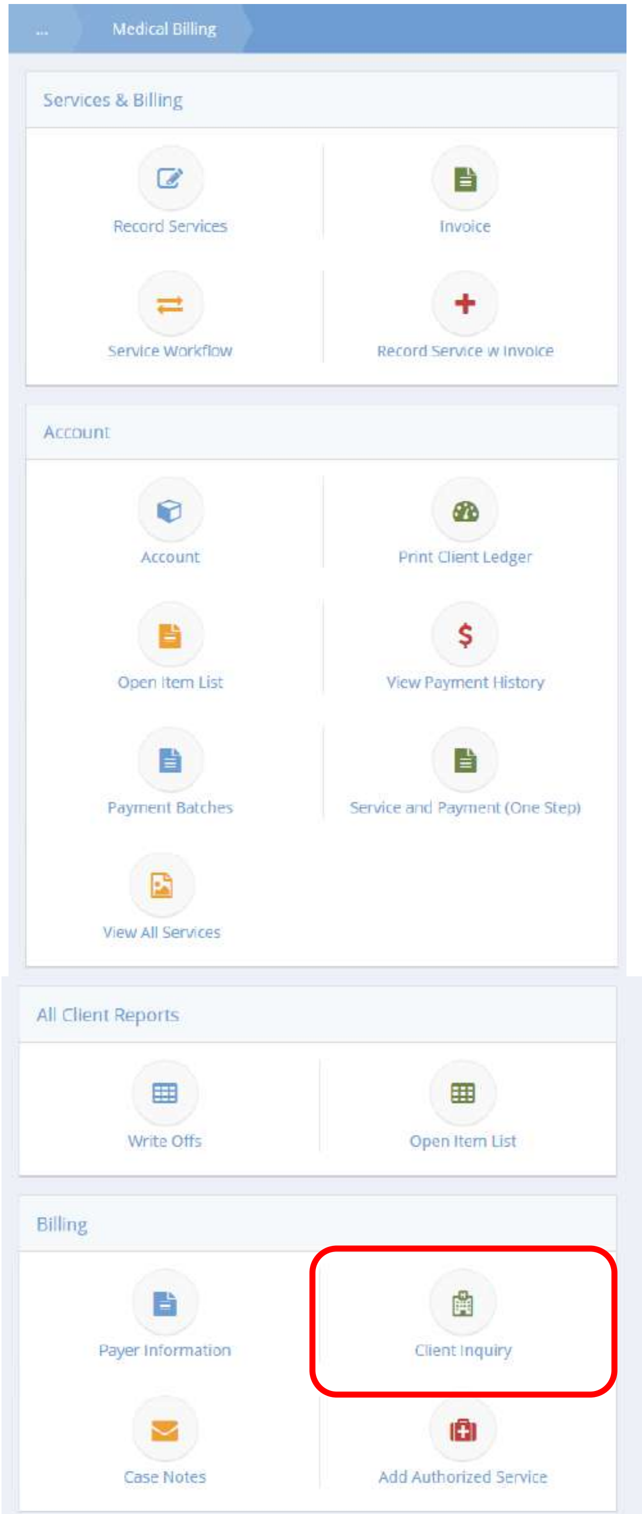
To edit existing vitals, click the action gear and click Edit. Make any changes and click Save when finished.



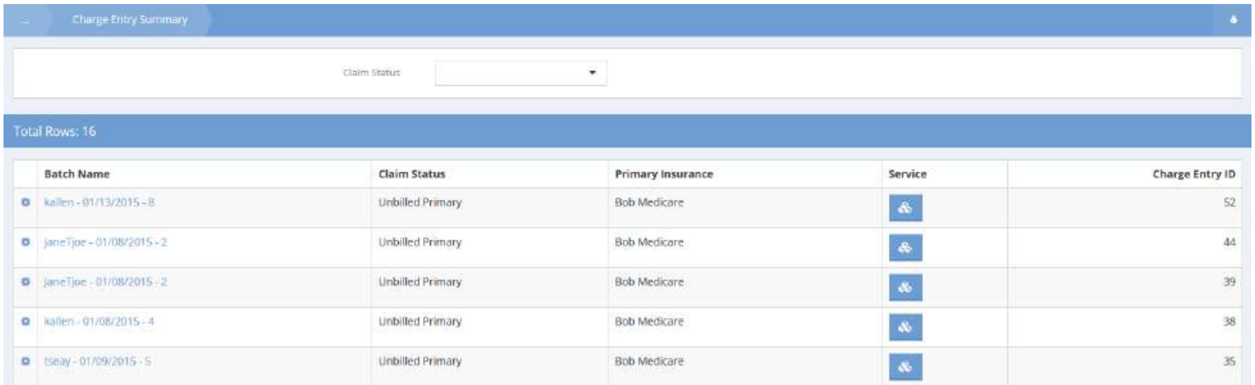
Medical Billing

Charge Entry Summary

Objective: View a summary of medical billing charges.



Click the Client Inquiry icon. The Charge Entry Summary form displays.

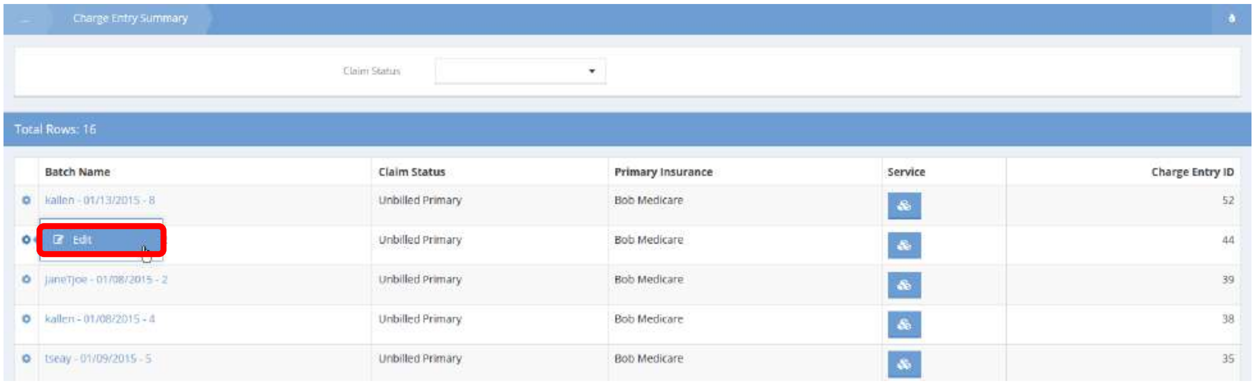

Charge Entry Summary

Claim Status

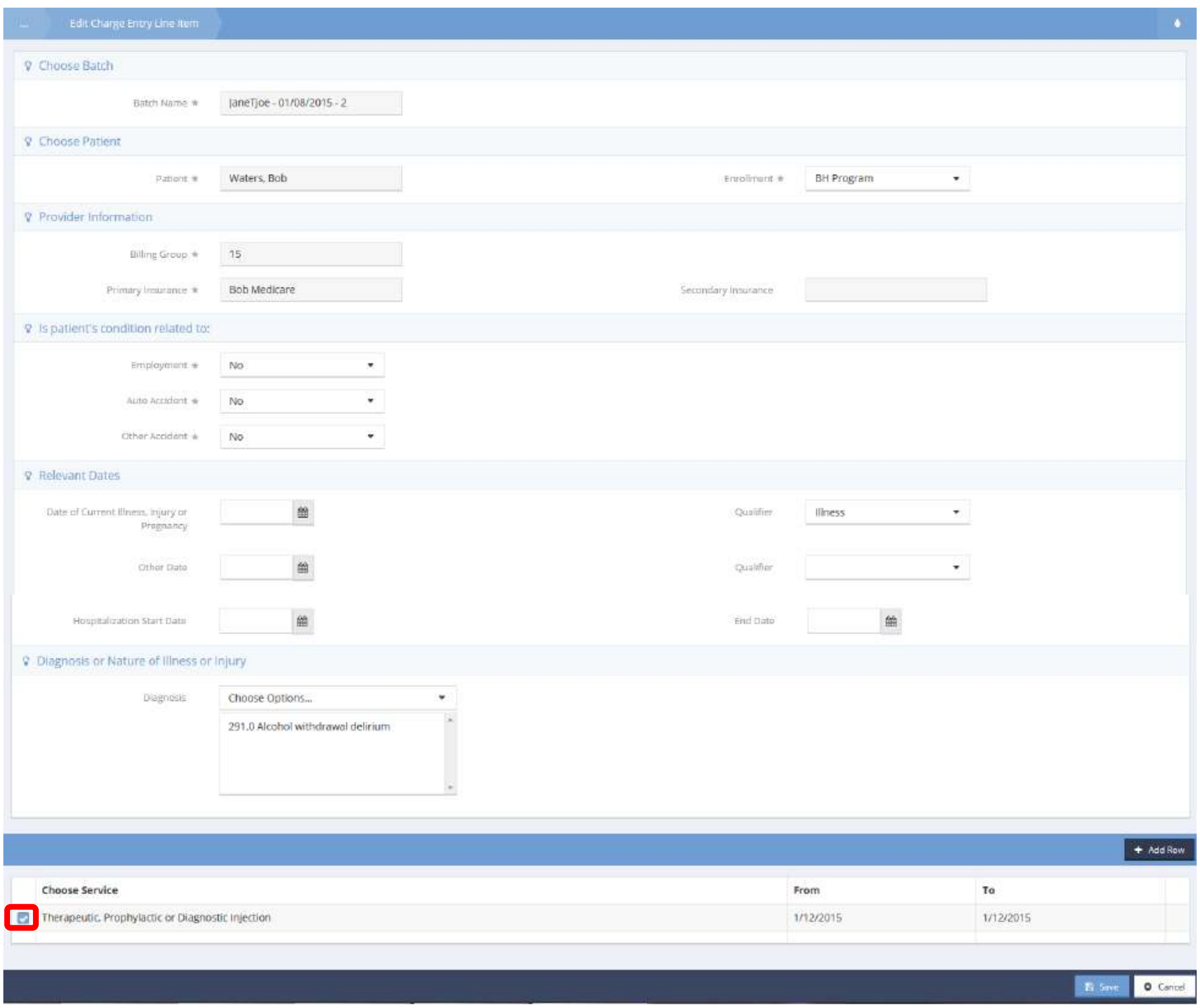
Total Rows: 16

Batch Name	Claim Status	Primary Insurance	Service	Charge Entry ID
kallen - 01/13/2015 - 8	Unbilled Primary	Bob Medicare		52
janeTjoe - 01/08/2015 - 2	Unbilled Primary	Bob Medicare		44
janeTjoe - 01/08/2015 - 2	Unbilled Primary	Bob Medicare		39
kallen - 01/08/2015 - 4	Unbilled Primary	Bob Medicare		38
tseay - 01/09/2015 - 5	Unbilled Primary	Bob Medicare		35

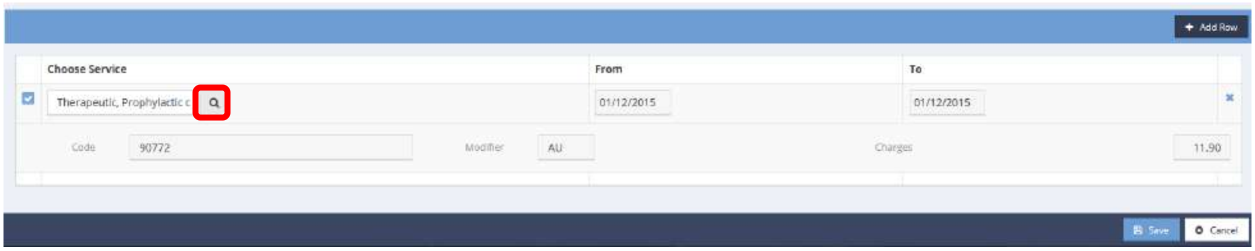
To edit an entry, click the action gear associated with it and select Edit from the pop up menu that appears.



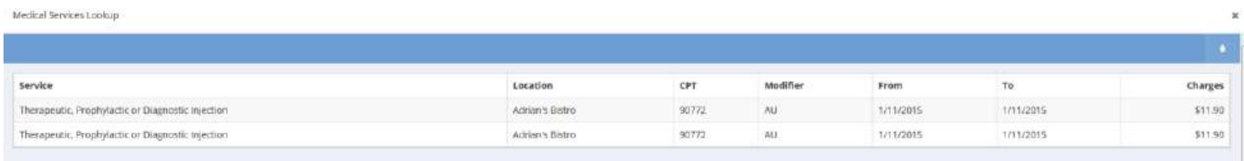
The Edit Charge Entry Line Item form displays.



Make any necessary changes. To edit a line item, click the blue checkbox icon associated with it. The row expands.



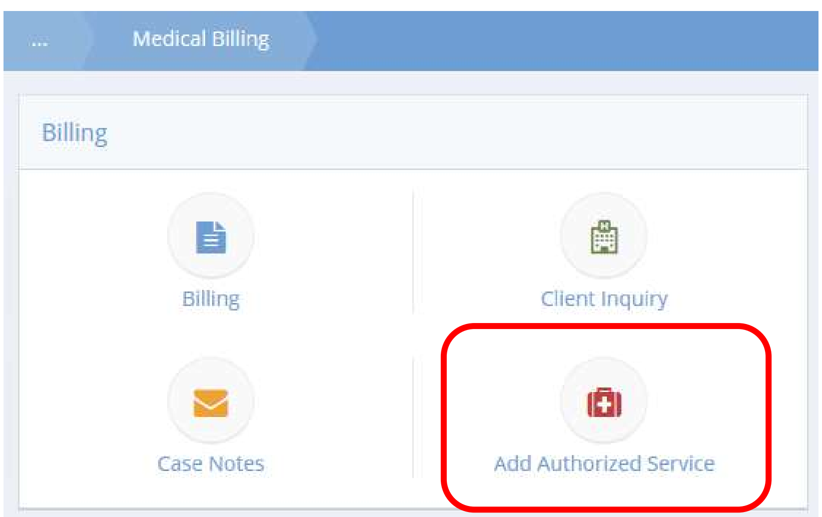
Make any changes. To choose a different service click the magnifying glass icon. The Medical Services Lookup form displays.



Select a service. The Edit Charge Entry Line Item form displays. Click Save when finished editing.

Medical Service Request

Objective: Create medical service request.



Click the icon for Add Authorized Service. The Service Request Summary form displays.

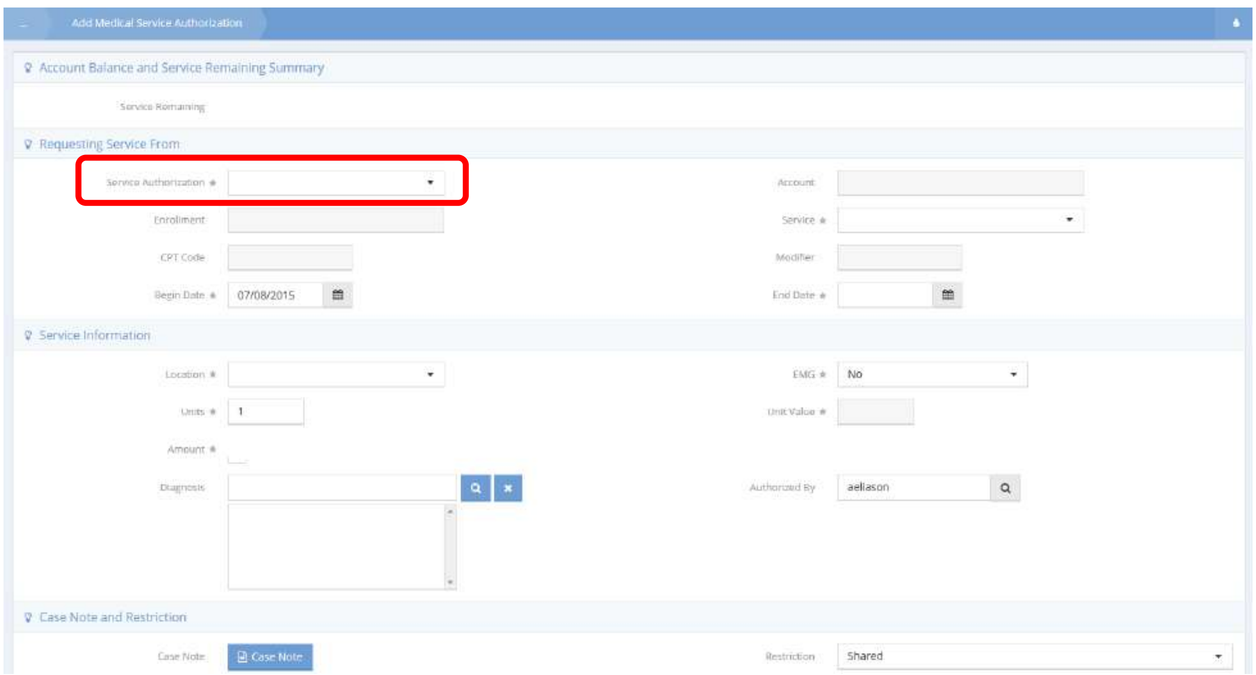

Service Request Summary

Add Medical Service

	Date	To Provider	Service	Status	Amount	Is Authorized
	5/12/2015	CaseWorthy	Drug Testing	Referred - 0	$1.00	No
	5/12/2015	CaseWorthy	Drug Testing	Referred - 0	$1.00	No
	5/1/2015	CaseWorthy	Psychiatric diagnostic evaluation	Referred - 0	$1.00	No
	5/4/2015	CaseWorthy	Medical Psychoanalysis	Referred - 0	$1.00	No
	5/2/2015	CaseWorthy	Drug Testing	Referred - 0	$100.00	No
	5/1/2015	CaseWorthy	Drug Testing	Referred - 0	$150.00	No
	5/1/2015	CaseWorthy	Psychiatric diagnostic evaluation	Referred - 0	$100.00	No

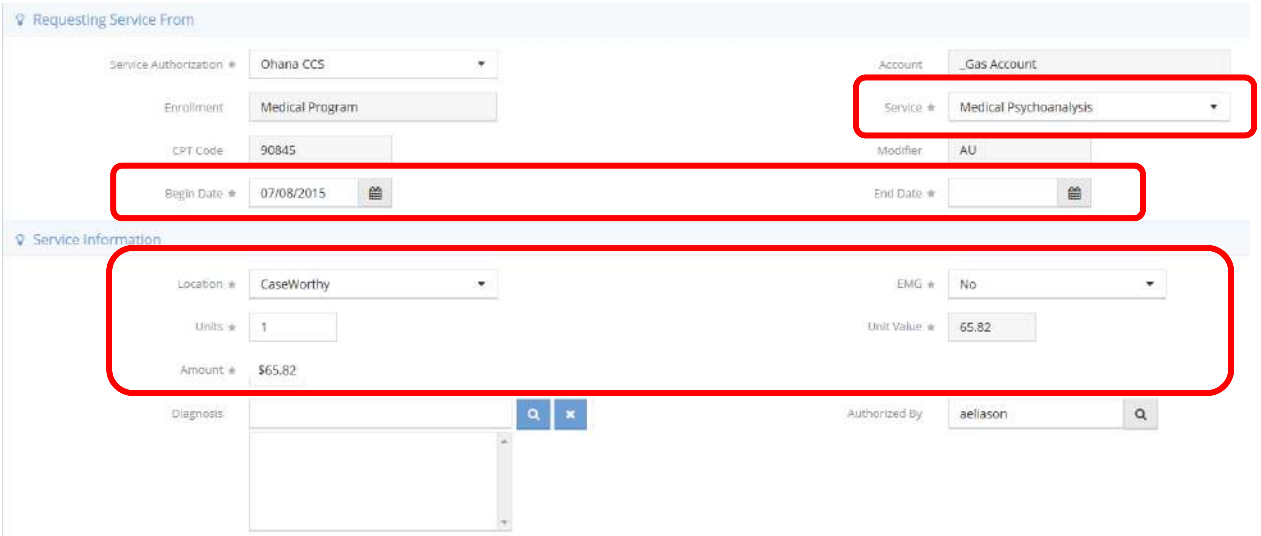
To add a new service, click the **Add Medical Service** button.

The Add Medical Service Authorization form displays.



Select a program from the Service Authorization drop-down list.

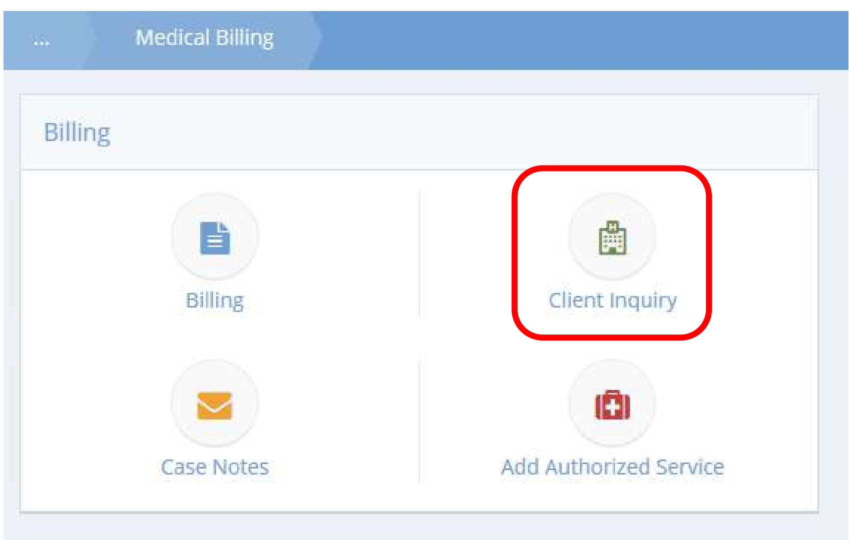
Note: ***Only programs containing medical services that the client is currently enrolled in display in the drop-down list.***



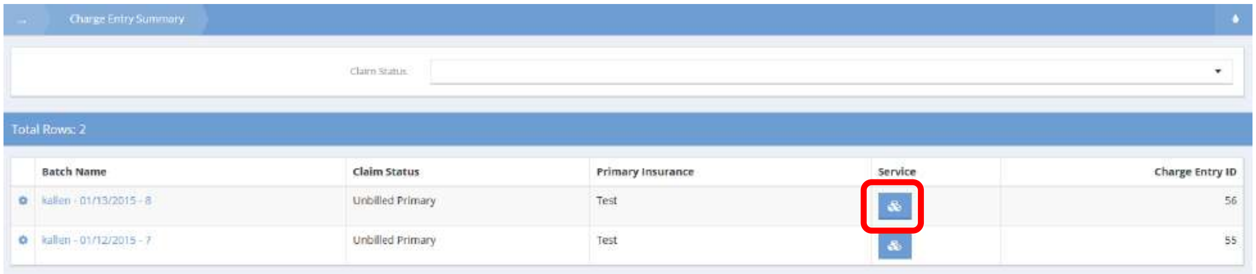
Select a service from the Service drop-down list. Enter a begin date and end date, select a location and alter any other fields as necessary. Click Save when finished.

Medical Charge Entry

Objective: Manage medical billing charge entries.



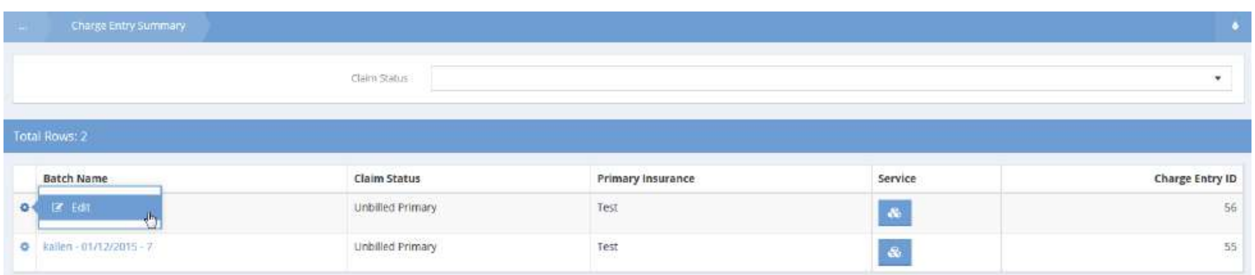
Click the icon for Client Inquiry. The Charge Entry Summary form displays.



To view services, click the icon for the appropriate program. The Charge Entry Services form displays.

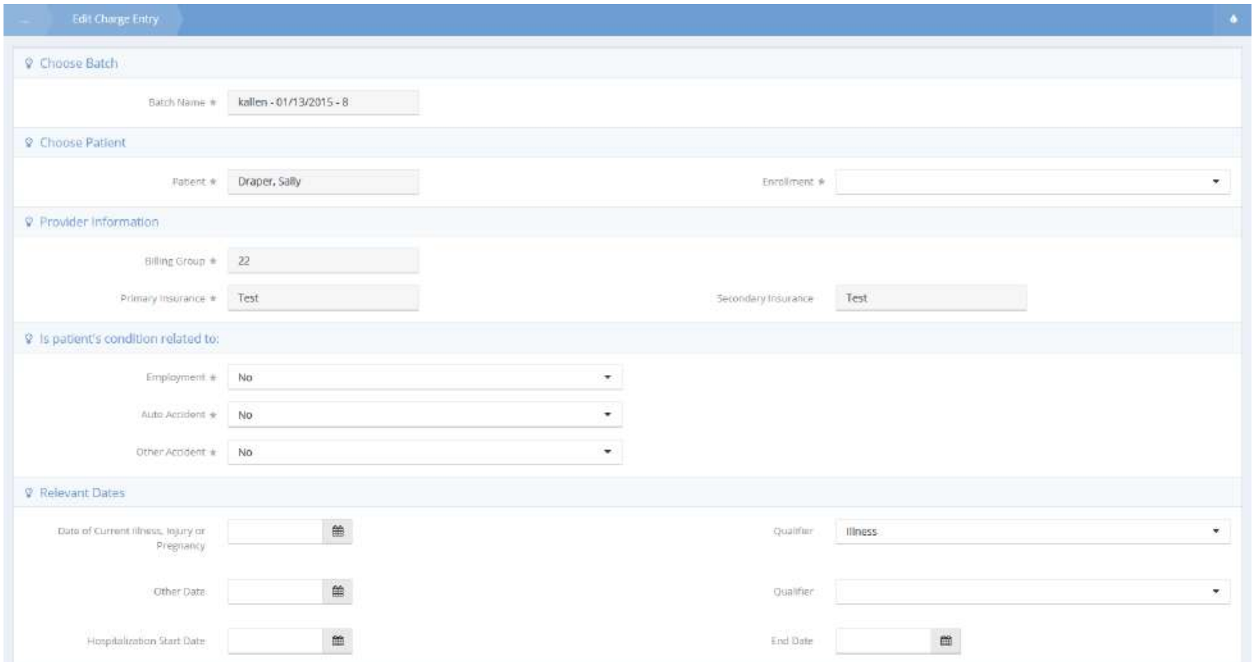
Click ✔ Done when finished viewing.

Edit



To edit a charge entry, click the action gear icon and click Edit.

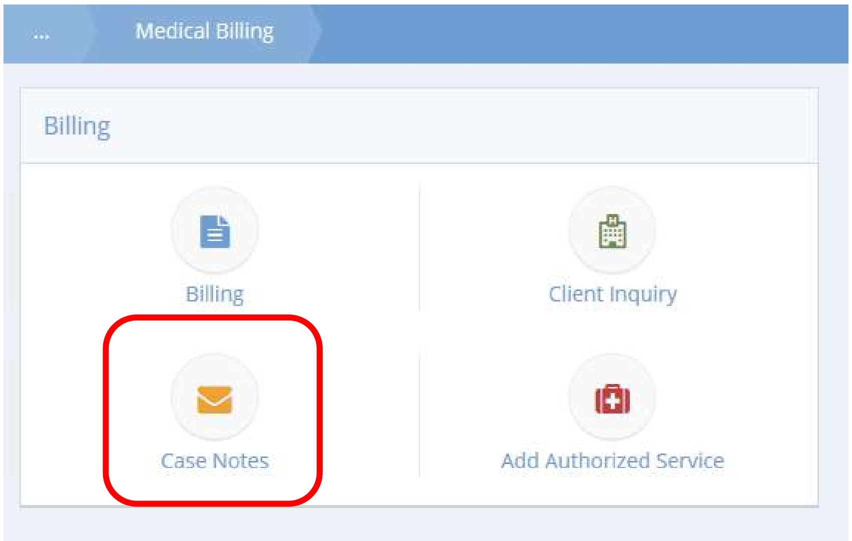
The Edit Charge Entry form appears.



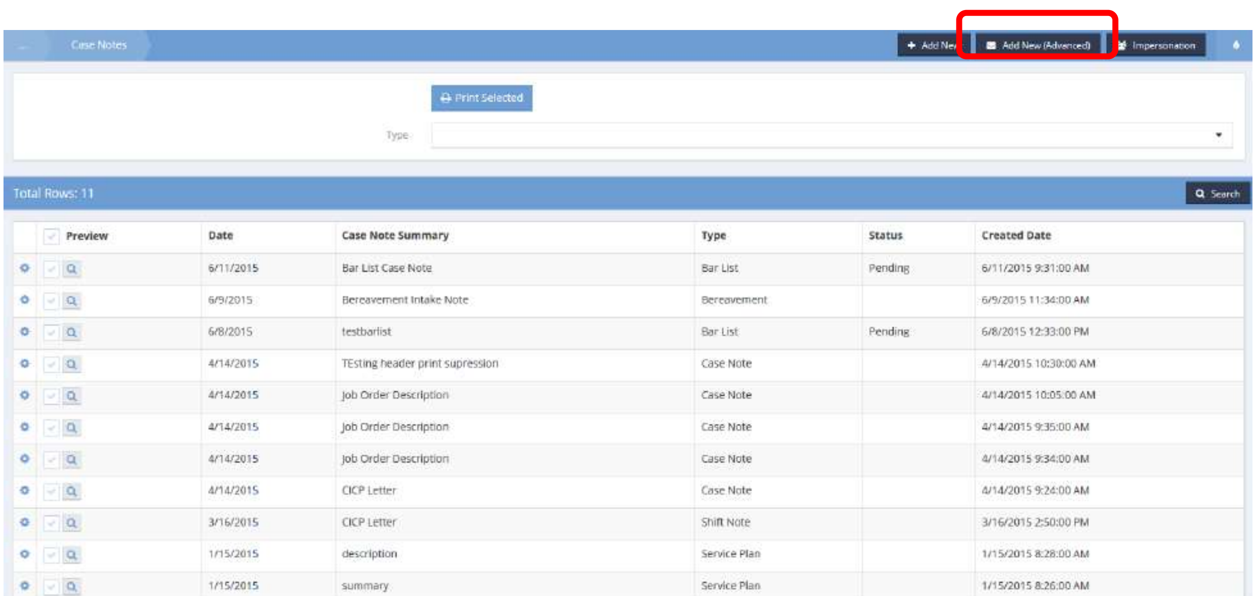
Make any desired changes and click Save when finished.

Medical Billing Service Entry

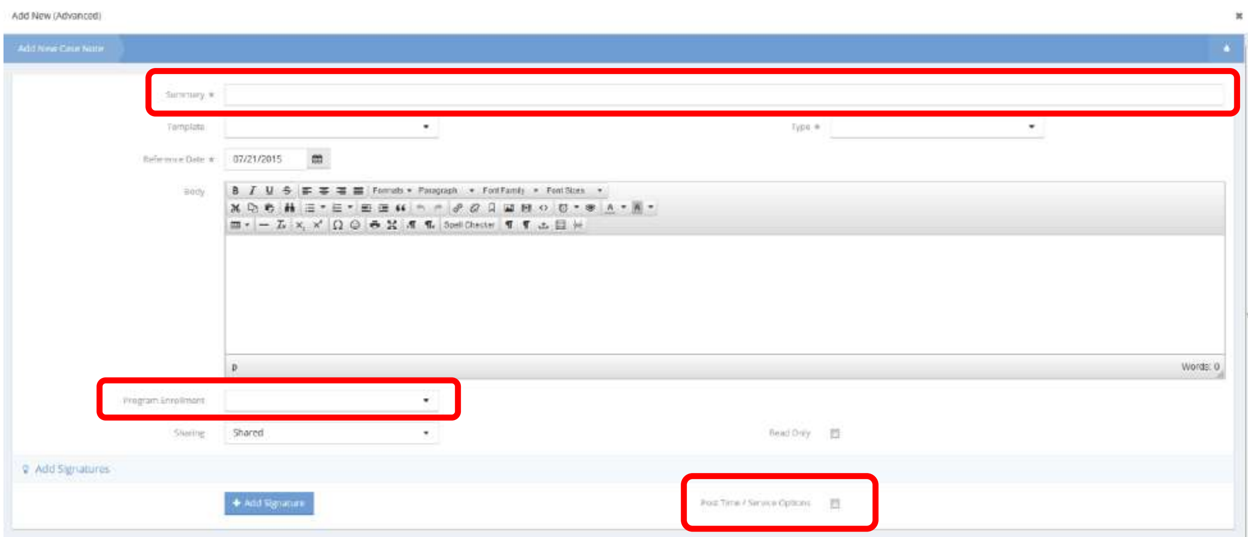
Objective: Record service for medical billing.



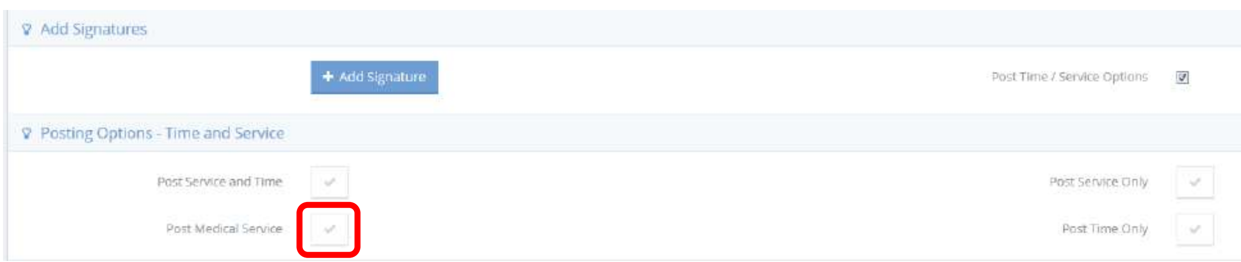
Click the icon for Case Notes. The Case Notes form displays. Click the Add New (Advanced) button.



The Add New Case Note form displays.

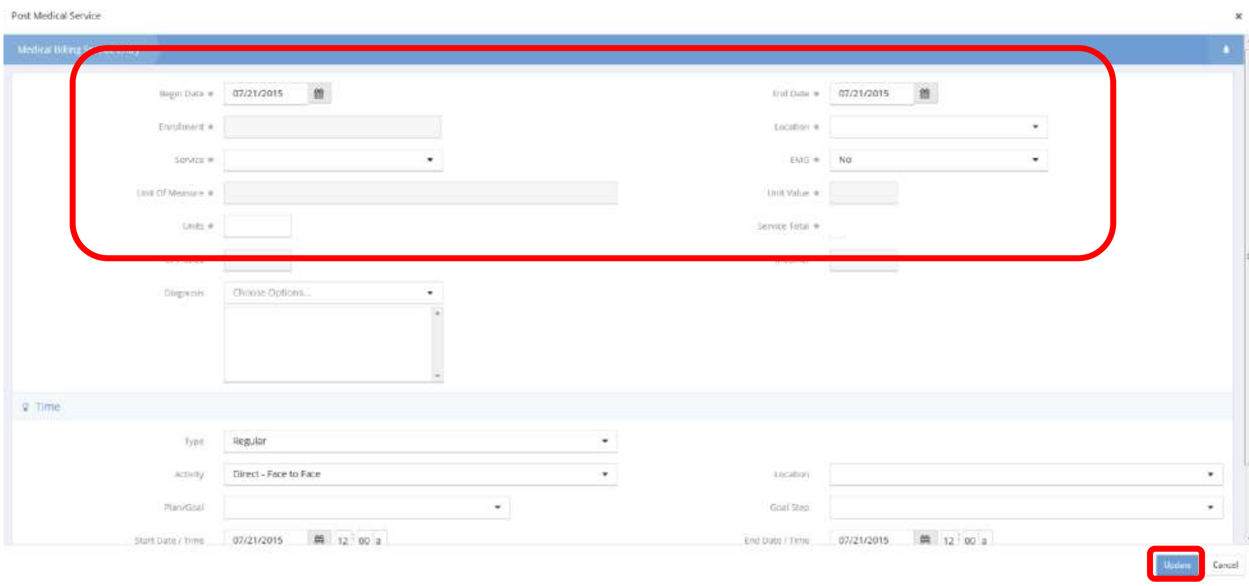


After entering a summary and selecting a type, select an enrollment from the Program Enrollment drop-down list. Click the checkbox for Post Time / Service Options. More options appear in the space below.



Click the checkbox for Post Medical Service.

The Medical Billing Service Entry form displays in a new window.



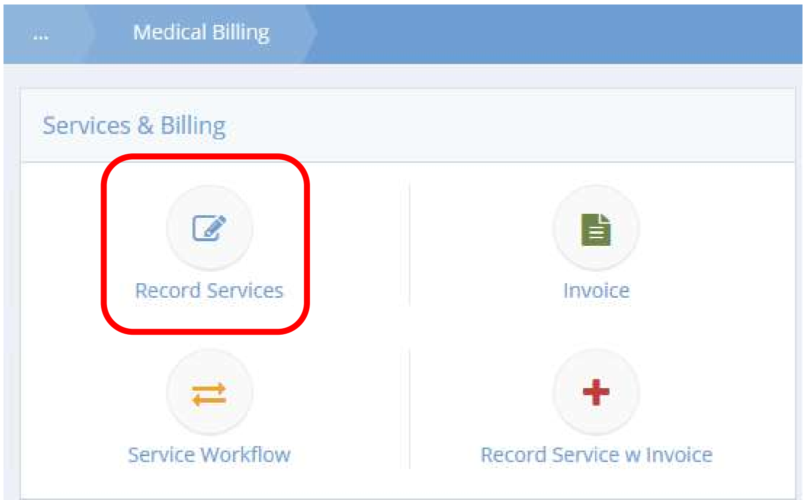
The enrollment field autocompletes based on what was selected for the case note. Enter a date range. Select a location and service from the drop-down lists. Indicate whether EMG or not. Enter a number of units. Complete any other fields as applicable and click the Update button.

If any changes need to be made to the medical billing, click the Edit button. When finished, click the Save button to complete the case note.

Service Spreadsheet (Update Client Account)

Objective: Record medical services for billing.

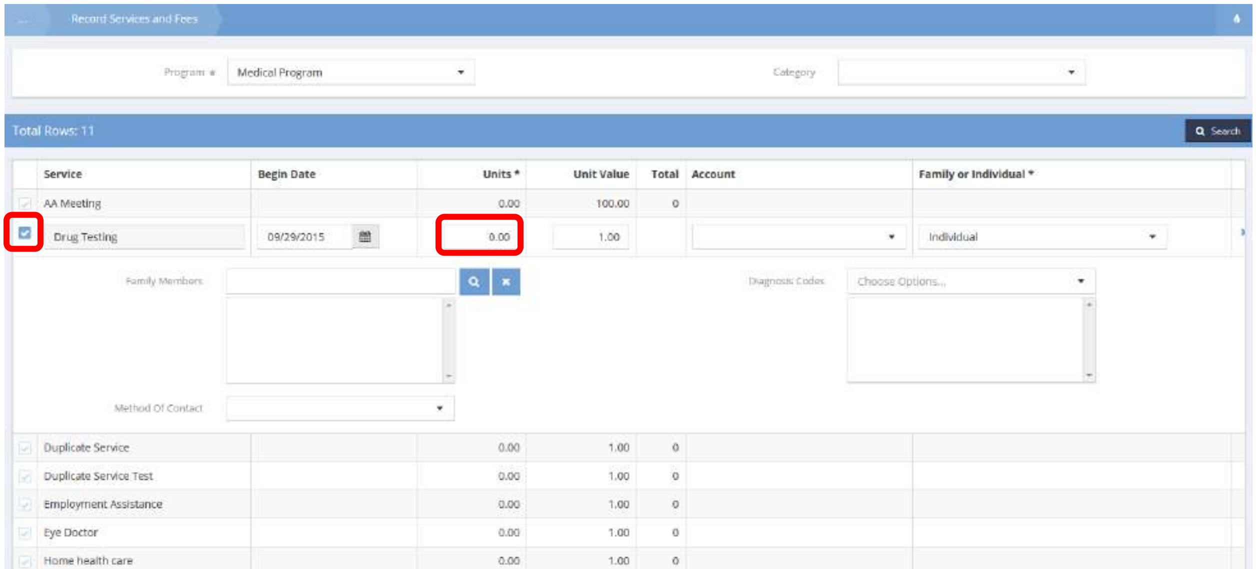
Navigation: Case Management>Health Management>Medical Billing

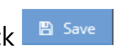


Click the icon for Record Services. The Record Services and Fees form displays.

Select a program from the drop-down list and click the Search button.

A list of medical services displays on the lower portion of the screen.



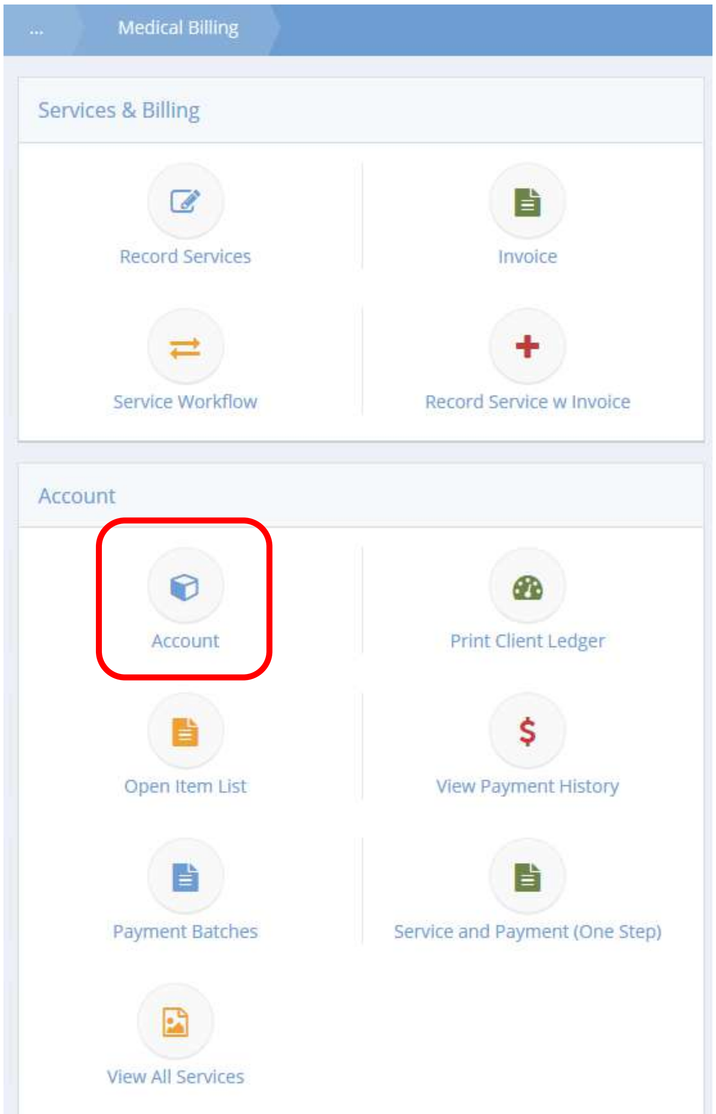
To record a service, click the clear checkbox icon. The row expands and the checkbox changes to  blue. Enter a number of units and any other relevant information. Click 

when finished.

Medical Billing Account Summary

Objective: View and create medical billing accounts.

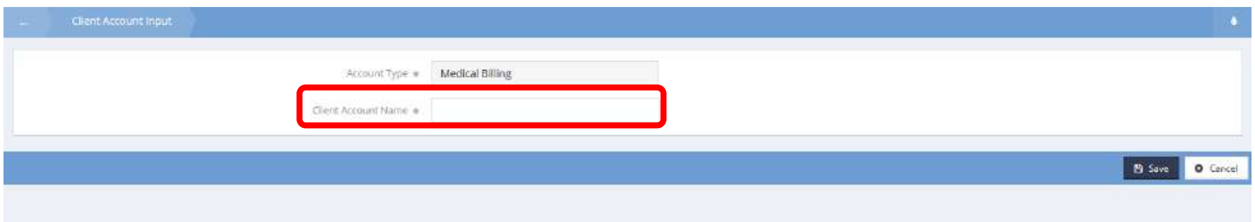
Navigation: Case Management>Health Management>Medical Billing



Click the Account icon.

The Client Account Summary form displays.

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



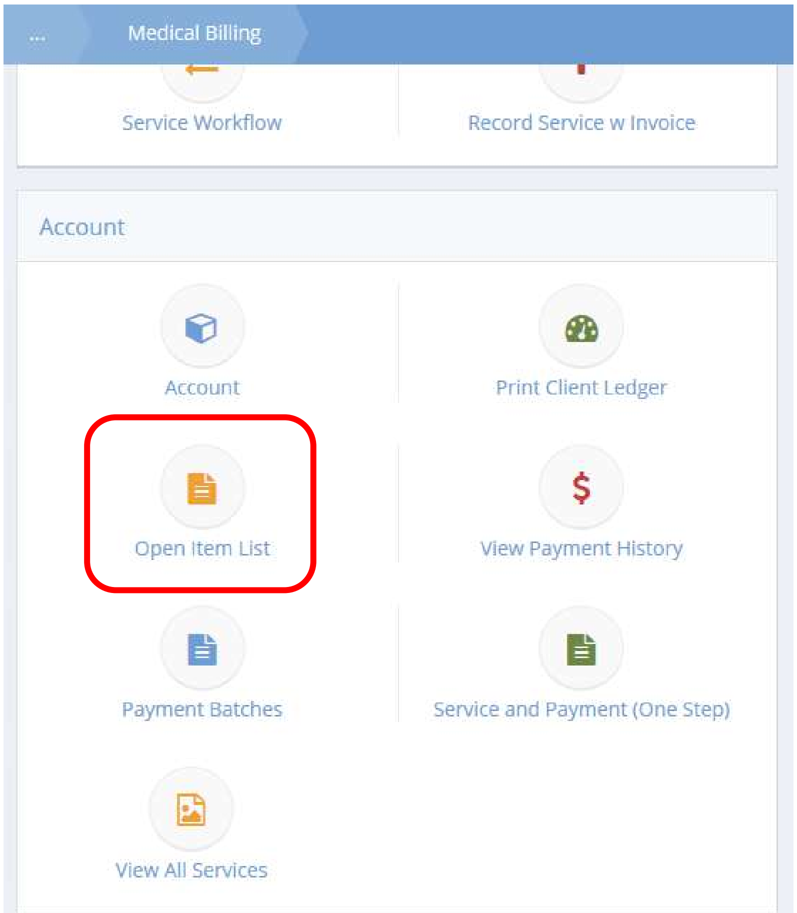
Enter an account name and click the Save button.

The newly created account displays on the summary form. Click on the action gear icon to edit the account name or type, view transactions and balances or manage services and payments.

Medical Account Client Summary

Objective: Create client payments to apply to medical billing services.

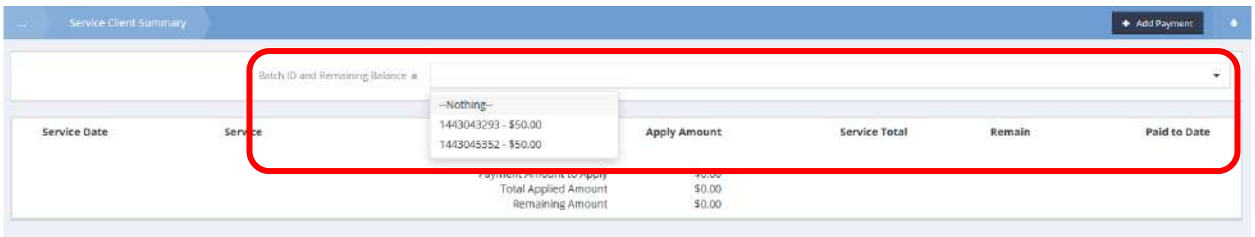
Navigation: Case Management>Health Management>Medical Billing



Click the icon for Open Item List. The Service Client Summary form displays. To create a new account payment, click the + Add Payment button.

Click the Add Row button. A new, expanded row appears.

Enter a date, amount, type, and target account. Click Save when finished.

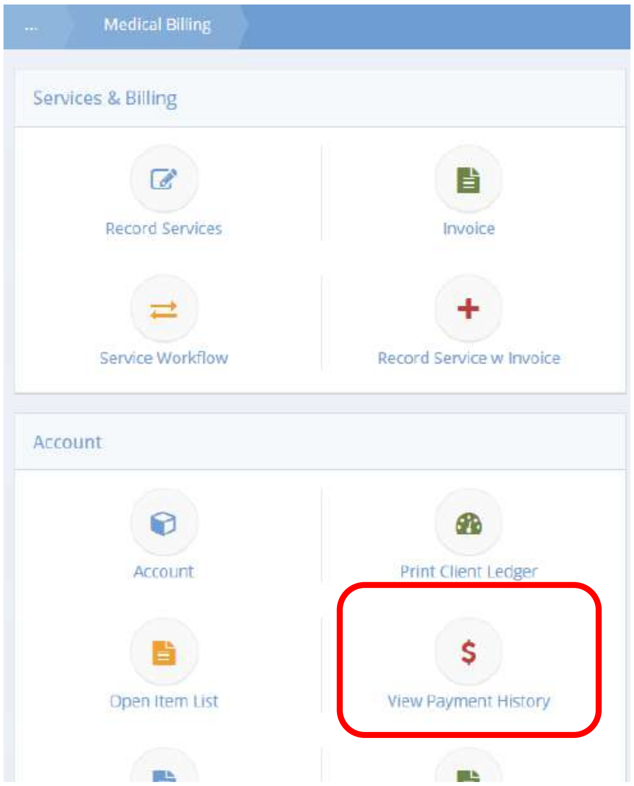


On the Service Client Summary form, the batch now appears in the drop-down list and can be applied to the desired service. Click Save when finished.

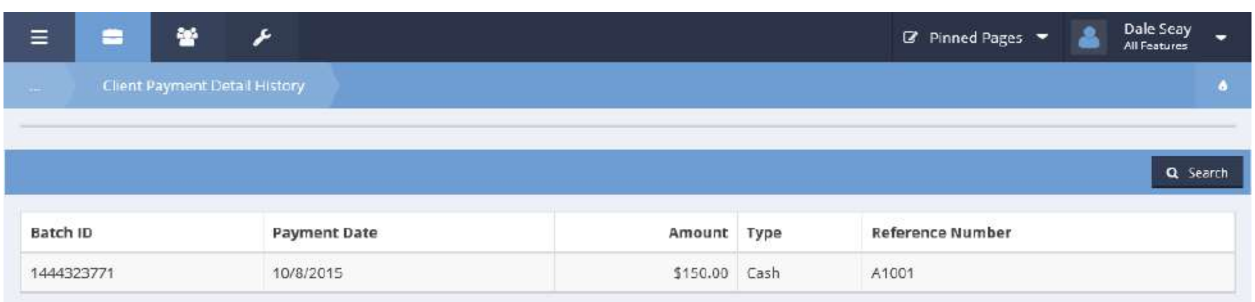
Medical Payment Detail History

Objective: View medical payment history.

Navigation: Case Management>Health Management>Medical Billing



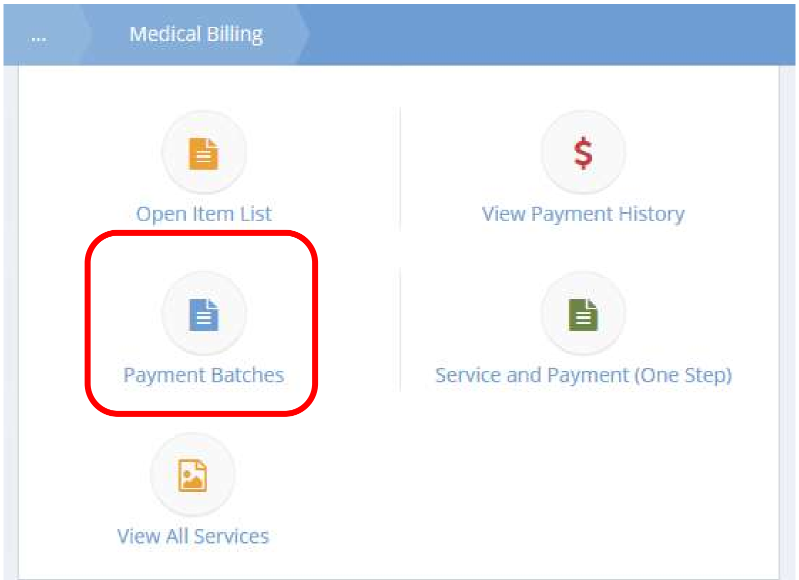
Click the icon for View Payment History. The Client Payment Detail History form displays a list of client payments.



Medical Payment Batches

Objective: View client medical payment batches.

Navigation: Case Management>Health Management>Medical Billing



Click the icon for Payment Batches. The Client Payment Batches form displays.

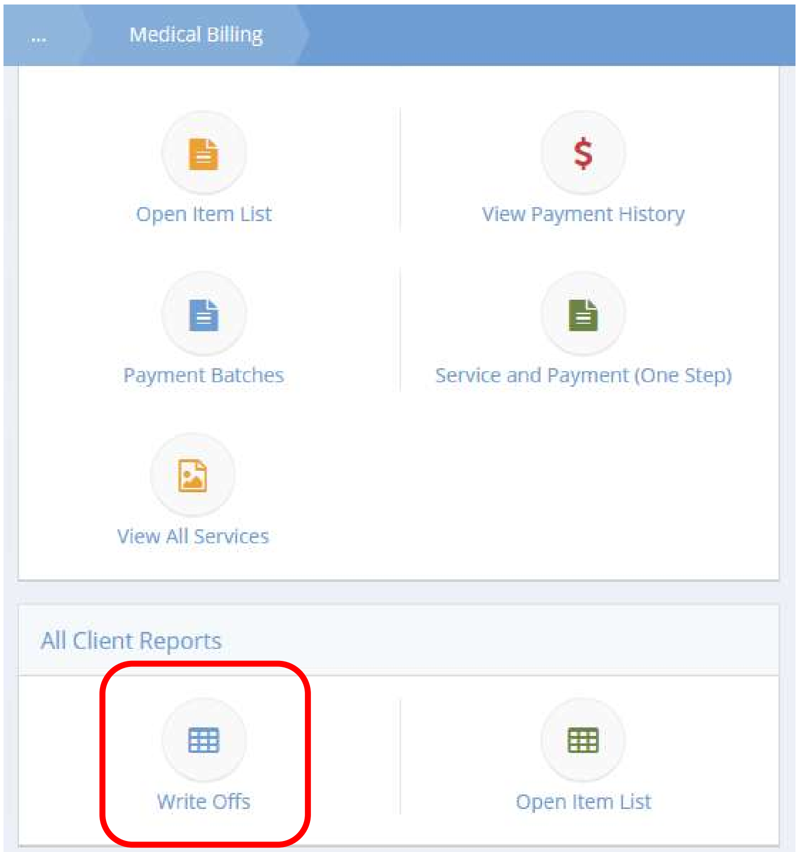
Batch Date	Client Batch ID	Paid To Date	Applied to Service Amount	Batch Remaining
9/23/2015	1443045352	$50.00	$0.00	$50.00
9/23/2015	1443044182	$50.00	$0.00	$50.00
9/23/2015	1443043645	$50.00	$0.00	$50.00
9/23/2015	1443043293	$50.00	$0.00	$50.00
		Total: $200.00		

Click on the action gear icon associated with the desired batch to view payment detail, batch detail or paid services, or print receipts.

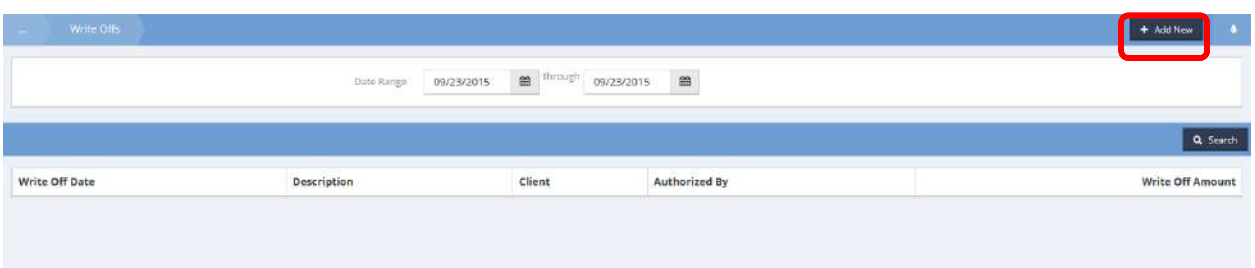
Write Off Summary

Objective: View and add client write-offs.

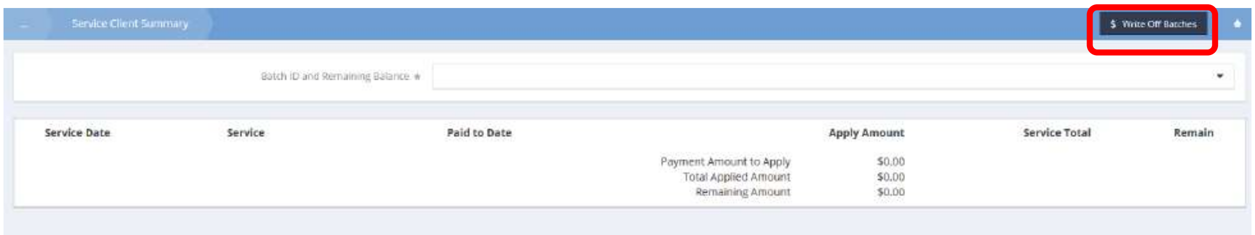
Navigation: Case Management>Health Management>Medical Billing



Click the icon for Write Offs. The Write Offs summary form displays. Click the + Add New button to create a new write-off.

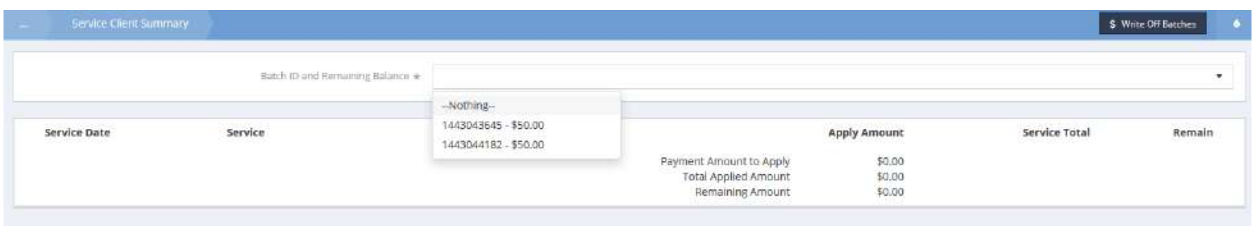


The Service Client Summary form displays.



Click the $ Write Off Batches button to create a new batch. The Client Account Payments form displays.

Click the + Add Row button. Enter a date, amount, and type. Click Save when finished. The Service Client Summary form redisplays.

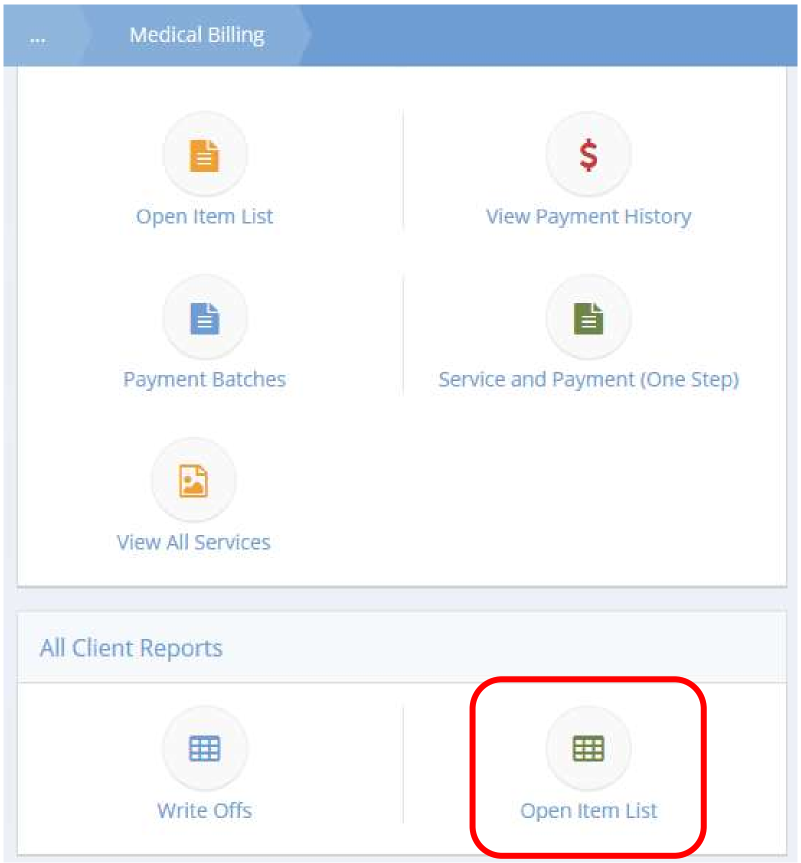


Select the newly created batch from the drop-down list and click the Save button when finished.

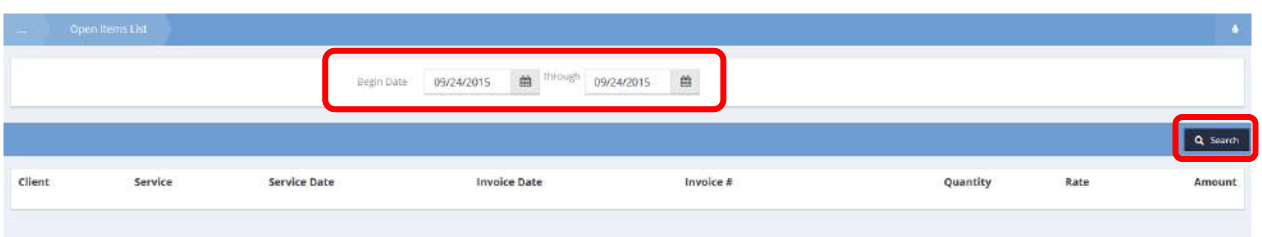
Unbilled Medical Self Pay Items

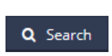
Objective: View all unbilled medical services.

Navigation: Case Management>Health Management>Medical Billing



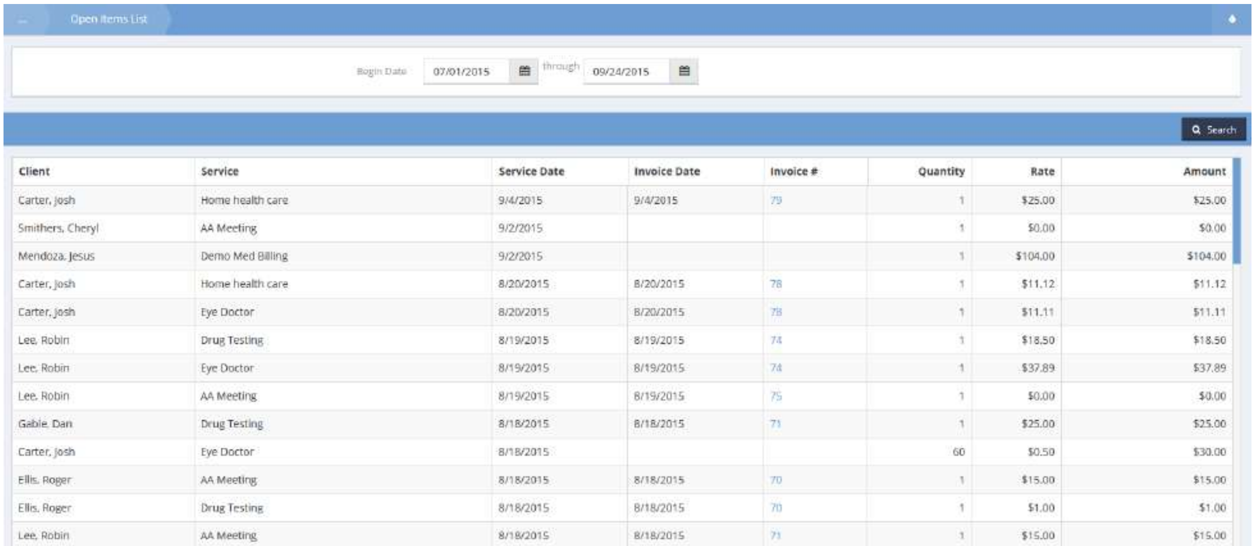
Click the icon for Open Item List in the All Client Reports section. The Open Items List form displays.



Select a date range and click the 

button.

All items within the specified date range display below the header section.

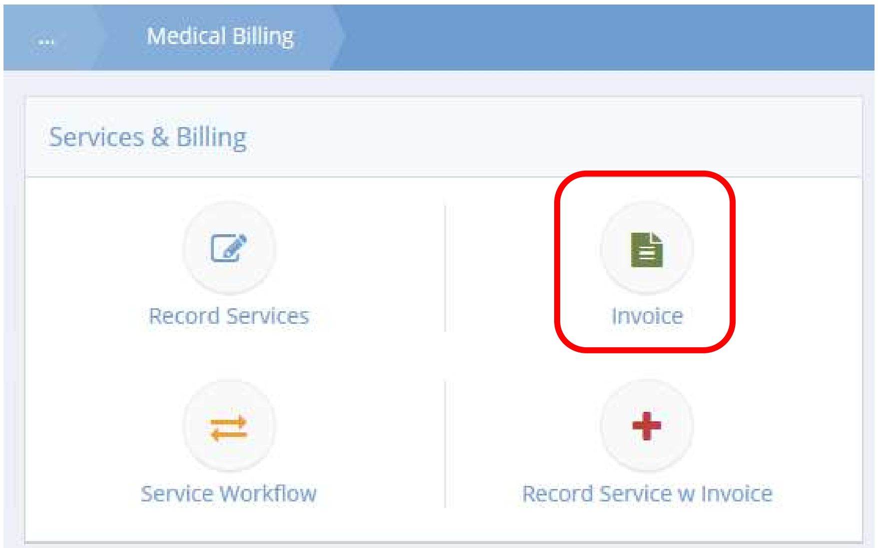


Client	Service	Service Date	Invoice Date	Invoice #	Quantity	Rate	Amount
Carter, Josh	Home health care	9/4/2015	9/4/2015	79	1	$25.00	$25.00
Smithers, Cheryl	AA Meeting	9/2/2015			1	$0.00	$0.00
Mendoza, Jesus	Demo Med Billing	9/2/2015			1	$104.00	$104.00
Carter, Josh	Home health care	8/20/2015	8/20/2015	78	1	$11.12	$11.12
Carter, Josh	Eye Doctor	8/20/2015	8/20/2015	78	1	$11.11	$11.11
Lee, Robin	Drug Testing	8/19/2015	8/19/2015	74	1	$18.50	$18.50
Lee, Robin	Eye Doctor	8/19/2015	8/19/2015	74	1	$37.89	$37.89
Lee, Robin	AA Meeting	8/19/2015	8/19/2015	75	1	$0.00	$0.00
Gable, Dan	Drug Testing	8/18/2015	8/18/2015	71	1	$25.00	$25.00
Carter, Josh	Eye Doctor	8/18/2015			60	$0.50	$30.00
Ellis, Roger	AA Meeting	8/18/2015	8/18/2015	70	1	$15.00	$15.00
Ellis, Roger	Drug Testing	8/18/2015	8/18/2015	70	1	$1.00	$1.00
Lee, Robin	AA Meeting	8/18/2015	8/18/2015	71	1	$15.00	$15.00

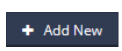
Medical Invoice Summary

Objective: View and add new medical invoices.

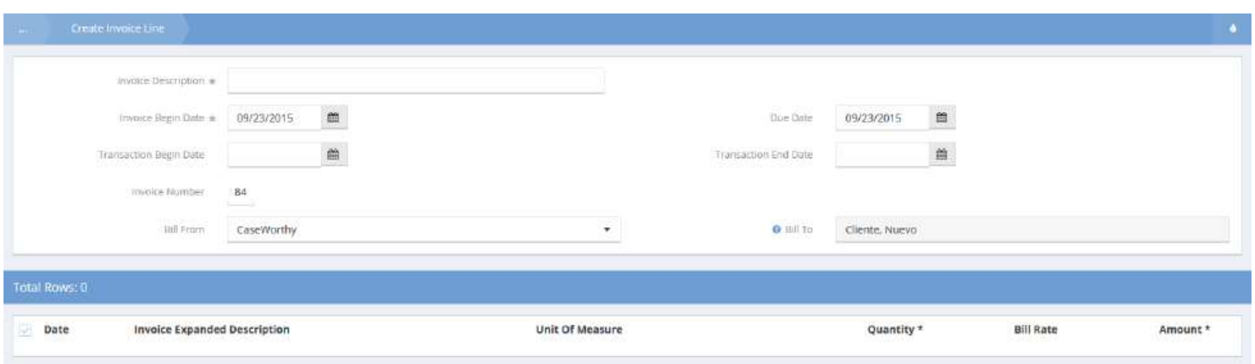
Navigation: Case Management>Health Management>Medical Billing



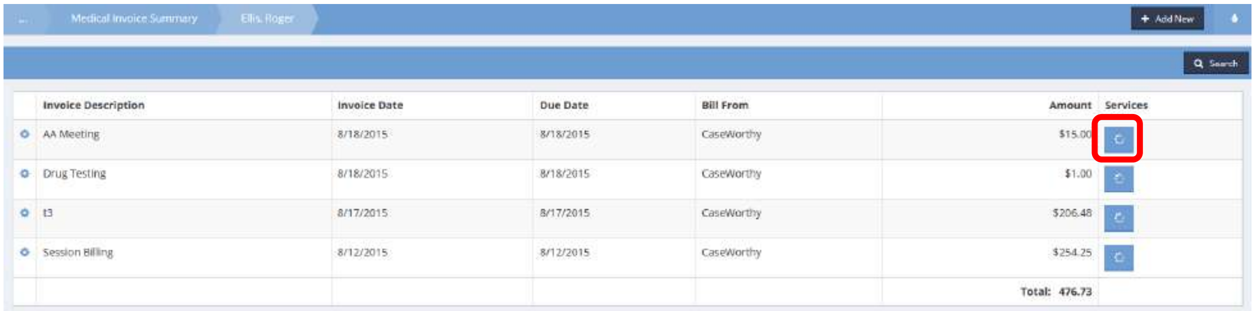
The Medical Invoice Summary form displays.

To create a new invoice, click the 

button. The Create Invoice Line form displays.

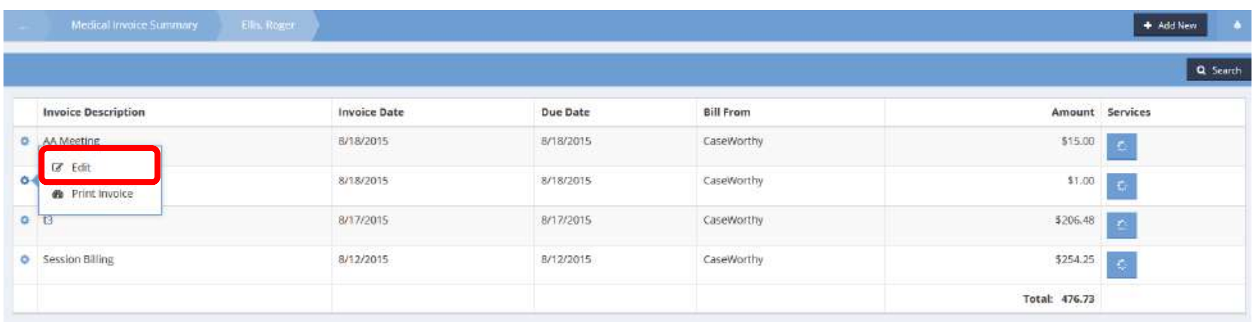


On the Medical Invoice Summary form, click the icon on an existing invoice.



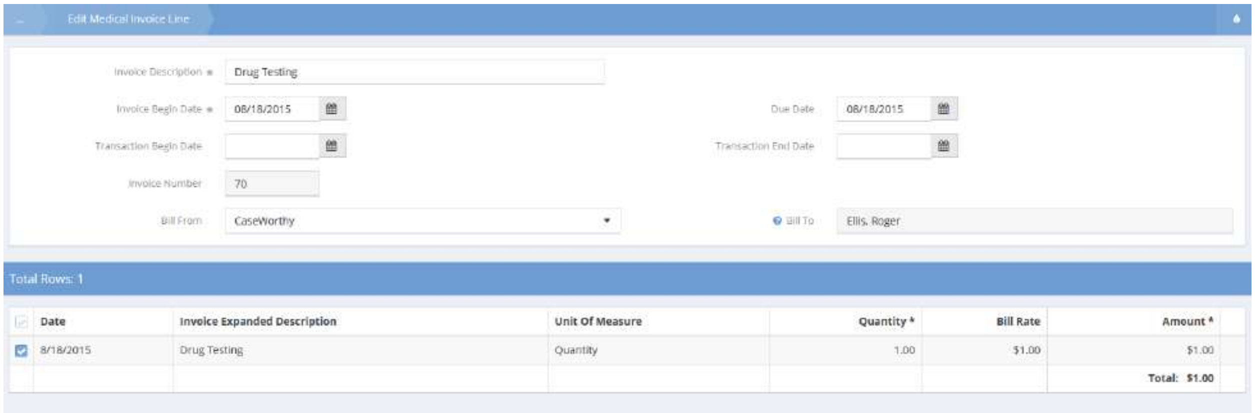
The Invoice Line Items Summary form displays.

Click Save when finished viewing.

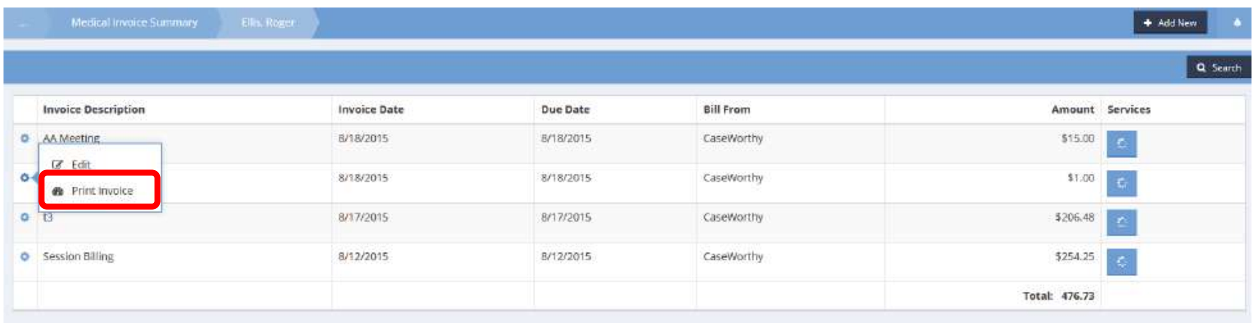


To edit an existing invoice, click the action gear icon associated with it and select Edit from the pop up menu that appears.

The Edit Medical Invoice Line form displays.

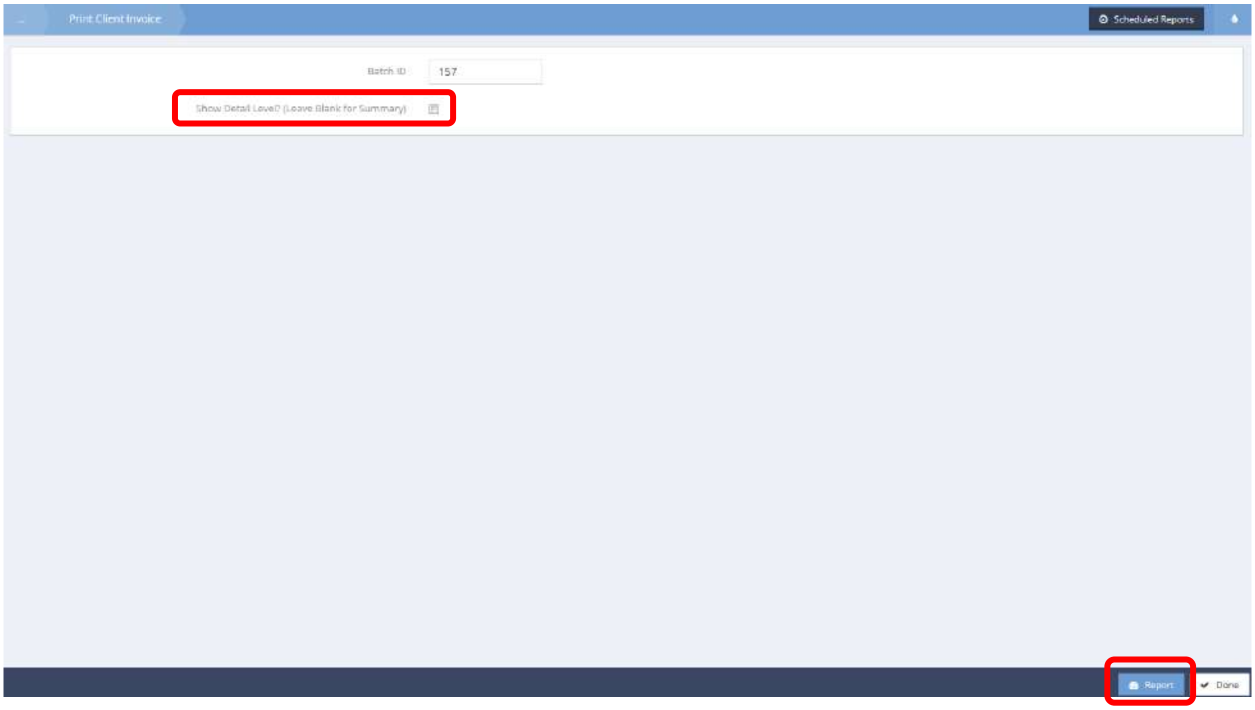


Make any desired changes and click Save / Generate Invoice when finished.



To print an invoice, click the action gear icon associated with it and select Print Invoice from the pop up menu that appears.

The Print Client Invoice form displays.



Click the checkbox to show detail level if desired. Click the Report button. The printable invoice displays in a new window.


1 of 1 Find | Next

CaseWorthy

INVOICE

Invoice: 70
August 18, 2015

CaseWorthy
740 East 3900 South
Salt Lake City, UT, UT 84107

801-888-9999

To: Roger Ellis
123 Main Street
Salt Lake City, UT 84111

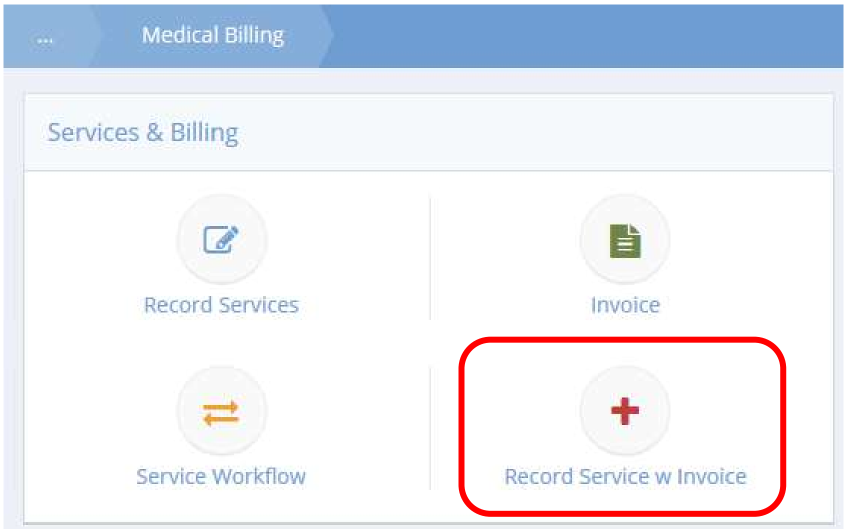
Counselor / Physician	Payment Terms	Due Date
	Net 30	8/18/2015

Quantity | Hours	Service	Rate	Amount
1	Drug Testing	1.00	$1.00
	Invoice Total:		$1.00
	Payments:		
	Write-Offs:		
	Balance Remaining:		**$1.00**

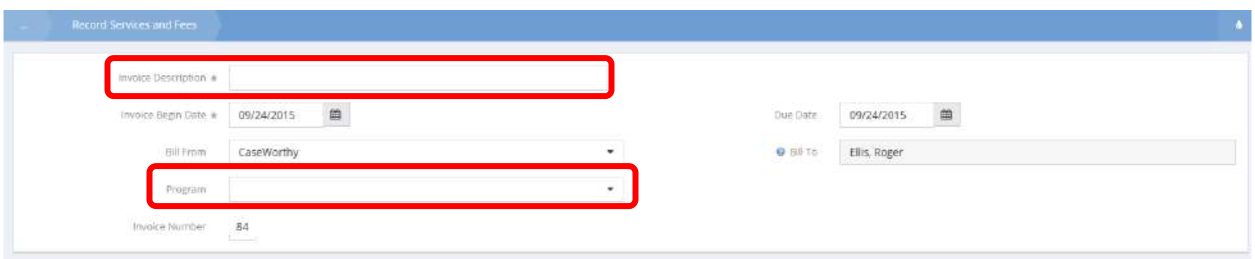
Generate Medical Invoice w Service

Objective: Record service and create new invoice.

Navigation: Case Management>Health Management>Medical Billing

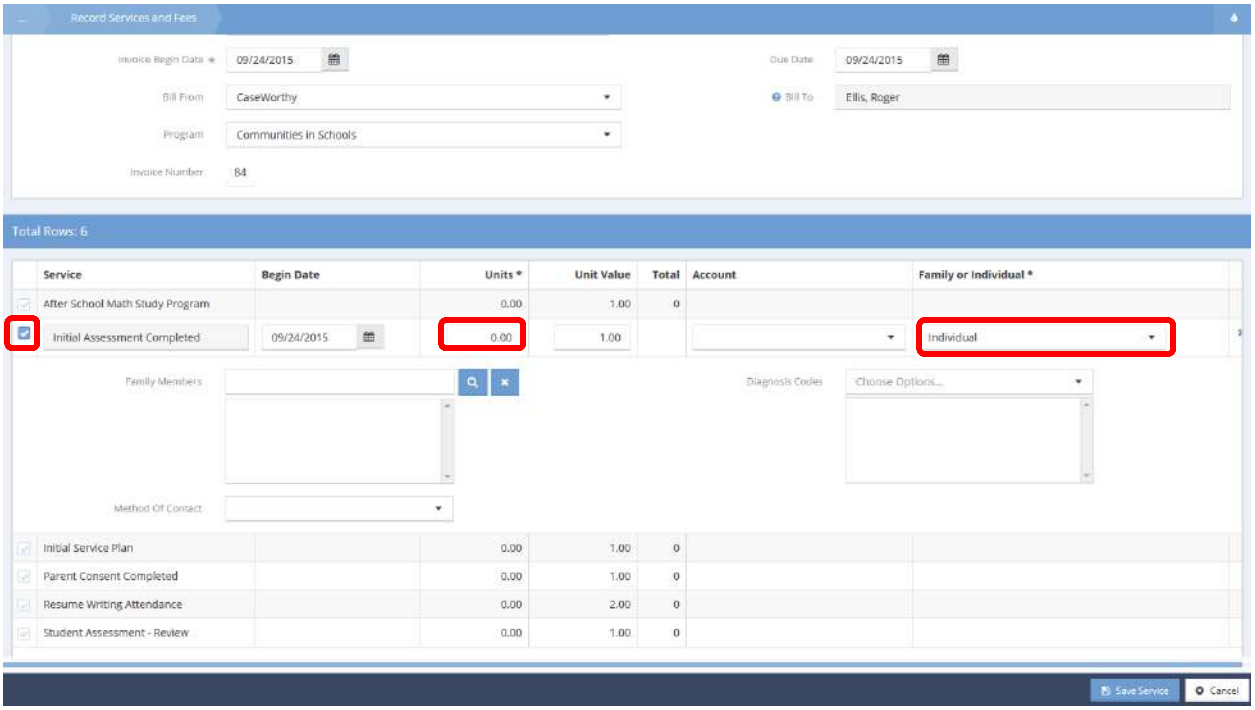


Click the icon for Record Service w Invoice. The Record Services and Fees form displays.



Enter a description and date. Select the program and where to bill from using the drop-down lists.

All relevant services display below the header section.



Click the clear checkbox icon to select a service, the row expands and the checkbox changes to blue. Enter the number of units, select family or individual, and enter any other info as needed. Click the Save Service button when finished.

Assessments

The Assessment Manager

Each assessment form has a CaseWorthy™ Assessment Manager enabling the user to create a new assessment without a template, create a new assessment using a template, or copy and overwrite an existing assessment.

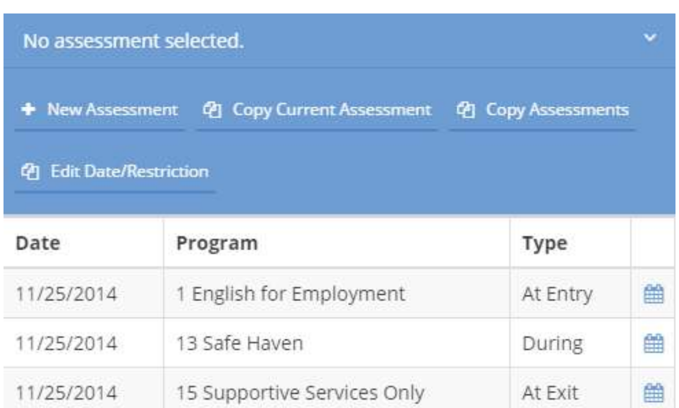
Within workflows, the system holds the information required to create the assessment. Users need not click on the Assessment Manager but just proceed with the assessment. However, when adding a new assessment from the HUD Assessments Dashboard, the form loads with "No assessment selected" allowing the user to setup the assessment as desired.

Before establishing an assessment, most HUD Assessments don't display any fields. During the process of selecting or creating an assessment, the user indicates which project enrollment and assessment event the assessment is for allowing the system to return the fields relevant to the particular scenario.

Create a Brand-New Assessment

Click on the 

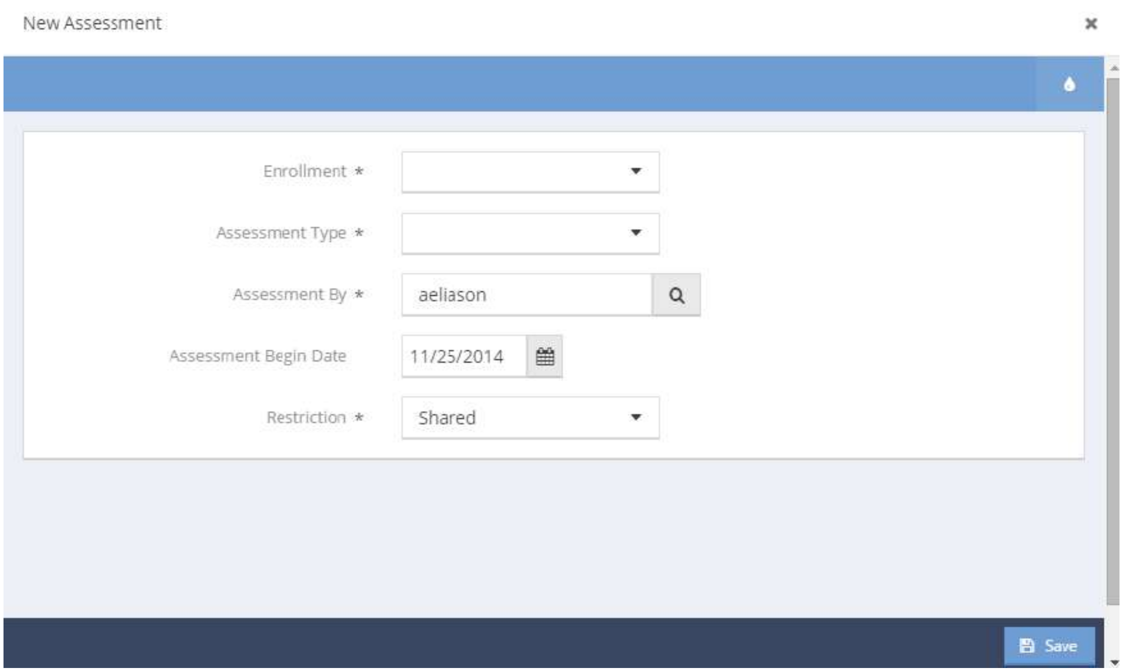
portion of the Assessment field. The field expands.



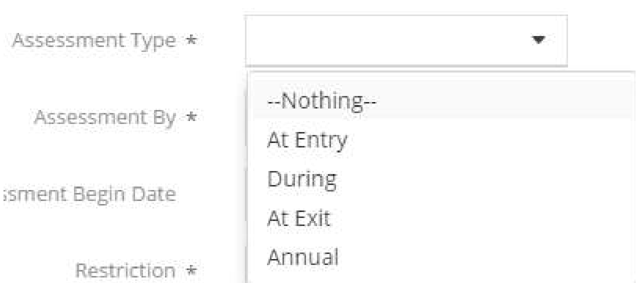
Date	Program	Type	
11/25/2014	1 English for Employment	At Entry	
11/25/2014	13 Safe Haven	During	
11/25/2014	15 Supportive Services Only	At Exit	

Click on the + New Assessment button to create a new assessment.

The New Assessment form displays.



Click on the down arrow icon for Enrollment and select the desired program from the drop-down list that appears. Click on the down arrow icon for Assessment Type.

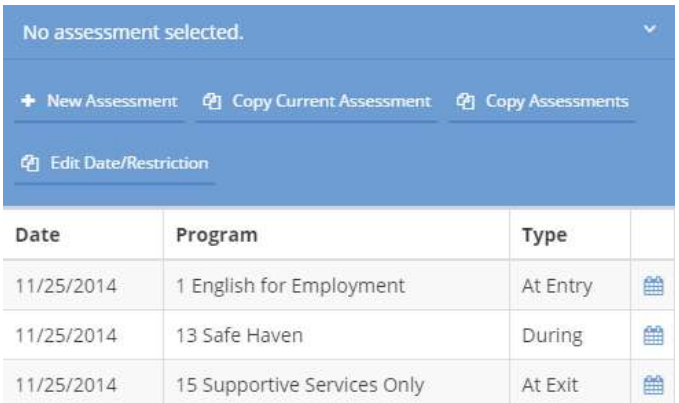


Select the desired value from the drop-down list that appears. Alter the assessment begin date or restriction if desired and click on the Save button.

Once the assessment is established, the Assessment field shrinks and the assessment form displays the fields relevant to the project type, funding sources, client age, client relationship to head of household for this enrollment, and the assessment type.

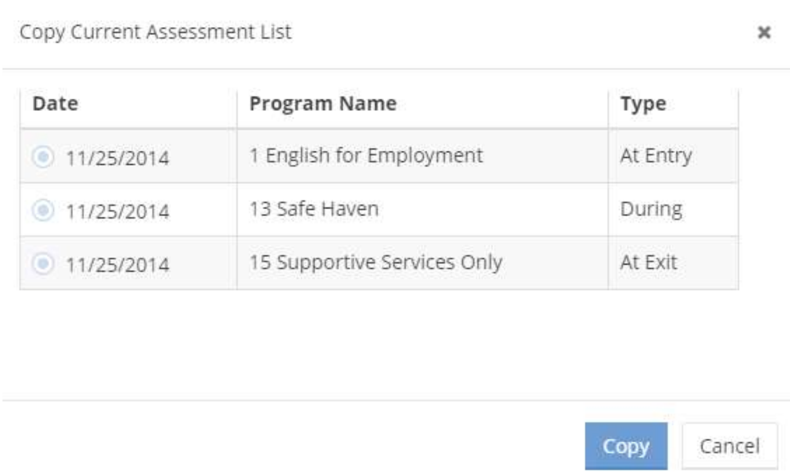
Create a New Assessment Using a Template

Click on the No assessment selected. portion of the Assessment field. The field expands.



Date	Program	Type	
11/25/2014	1 English for Employment	At Entry	
11/25/2014	13 Safe Haven	During	
11/25/2014	15 Supportive Services Only	At Exit	

Click on the Copy Current Assessment button to create a new assessment. A list of the current client's previous assessments of the same type appears (e.g., if using a HUD Universal Assessment form, the list shows previous HUD Universal Assessments.)



Date	Program Name	Type
11/25/2014	1 English for Employment	At Entry
11/25/2014	13 Safe Haven	During
11/25/2014	15 Supportive Services Only	At Exit

Select the radio button next to the assessment to use it as a template for a new assessment. Verify that the button changes and click the Copy button.

To copy all assessments for a particular enrollment and assessment event (entry, during, exit or annual), rather than just the current assessment type, select Copy Assessments

Indicate the desired assessment event for the new assessment and click the Copy Assessments button.

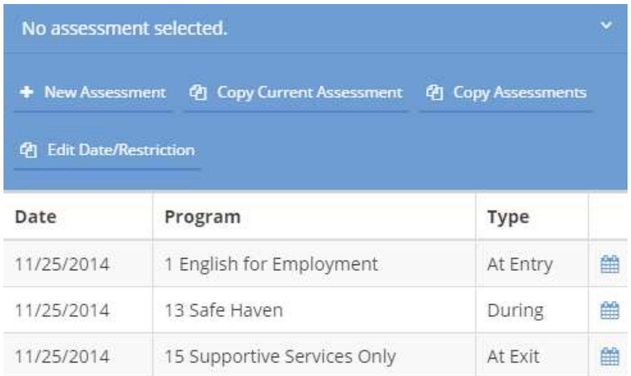
Once the assessment is established, the Assessment field shrinks and the assessment form displays the fields relevant to the project type, funding sources, client age, client relationship to head of household for this enrollment, and the assessment type. The fields auto-populate with the template assessment's answers. Review the answers and edit them as appropriate.

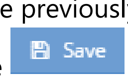
The date for the new assessment defaults to the current date. To change the date, click on the blue Assessment Manager bar, select Edit Date/Restriction when the Assessment Manager opens, and key in the new assessment date.

Copy and Overwrite an Existing Assessment

Click on the 

portion of the Assessment field. The field expands.



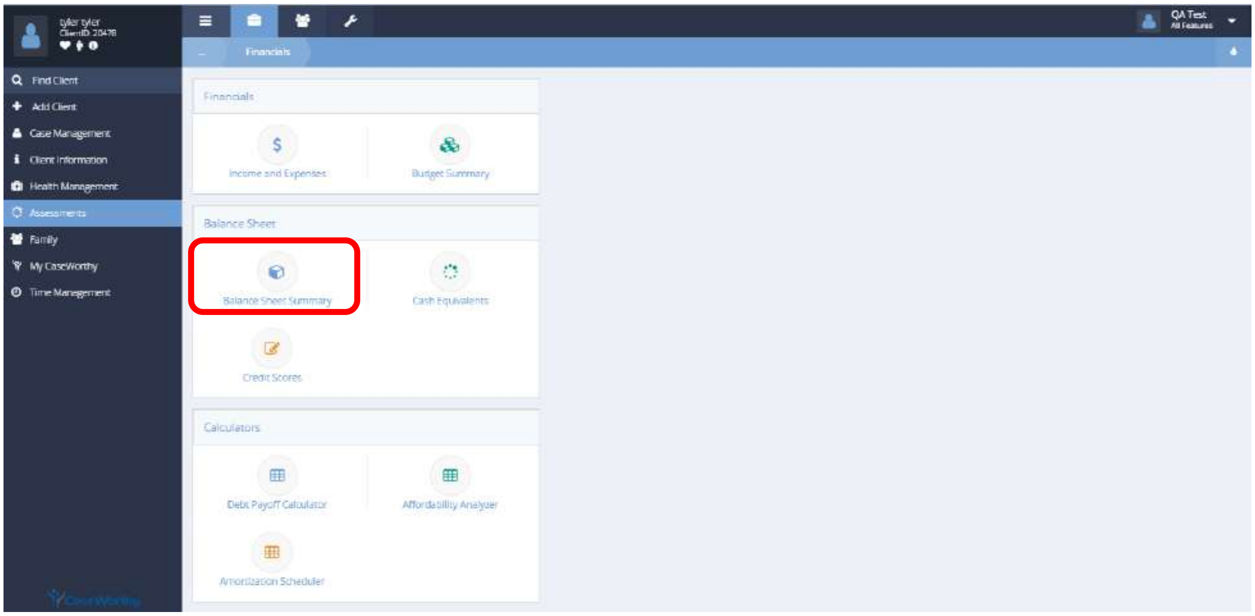
Select an assessment from the list to overwrite. The fields auto-populate with the previously saved assessment answers. Review the answers and edit them as appropriate. Click the 

button.

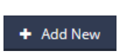
Financials

Objective: Add a new Balance Sheet Assessment

Navigation: Case Management>Assessments>Financials>Balance Sheet Summary

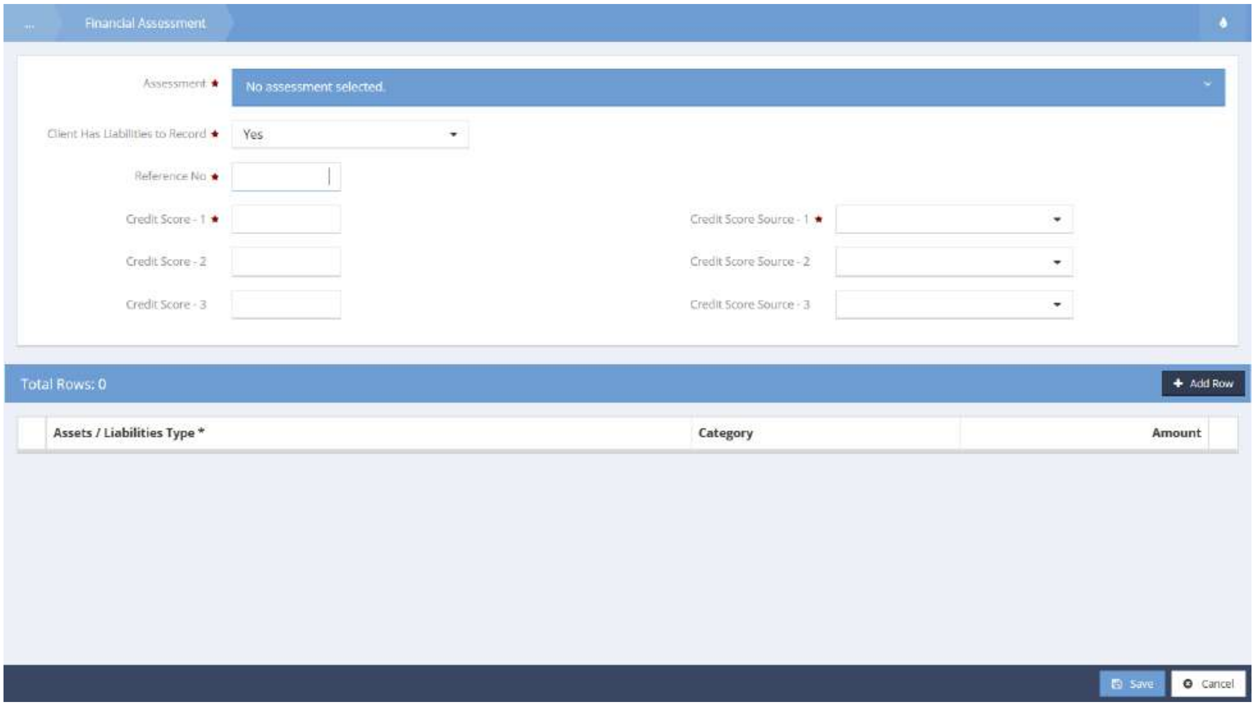


The Balance Sheet Summary form displays.

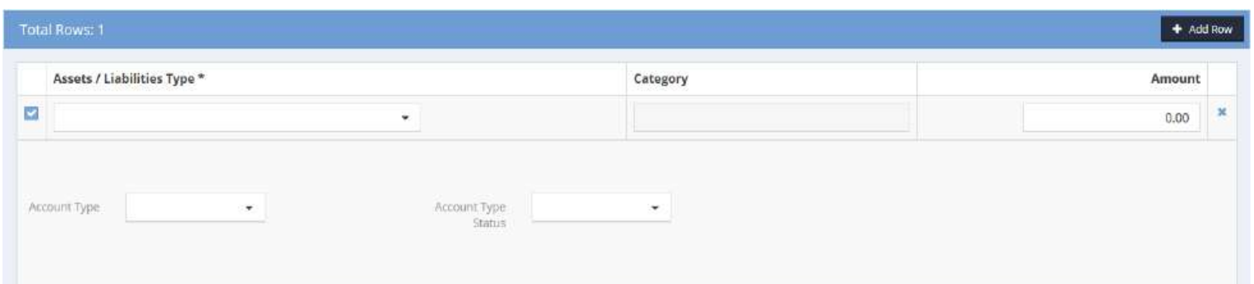
Click the 

button to add a new assessment.

The Financial Assessment form displays.



Select an assessment and enter the required and relevant data for the client. Click the Add Row button to activate the line item portion of the form and add Assets and/or liabilities.



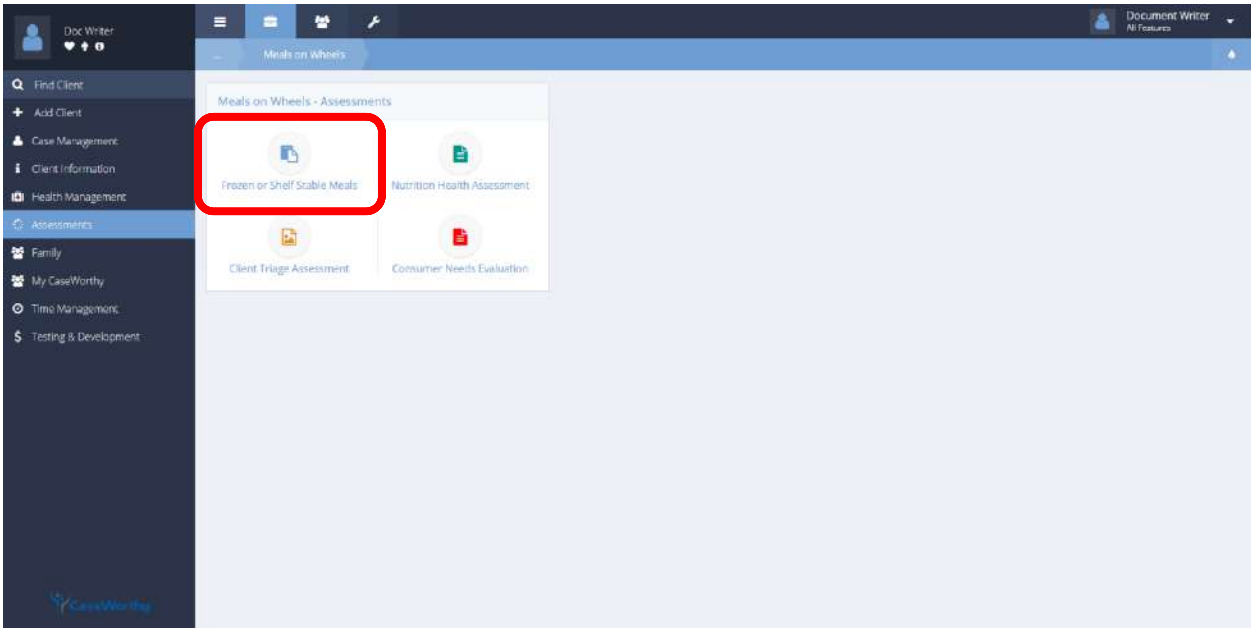
If the client does not have liabilities to record, the form fields shift appropriately and the Save button changes to Save No Assets or Liabilities button. Save to close.

Meals on Wheels

Frozen or Shelf Stable Meals

Objective: Add new Meals on Wheels assessments.

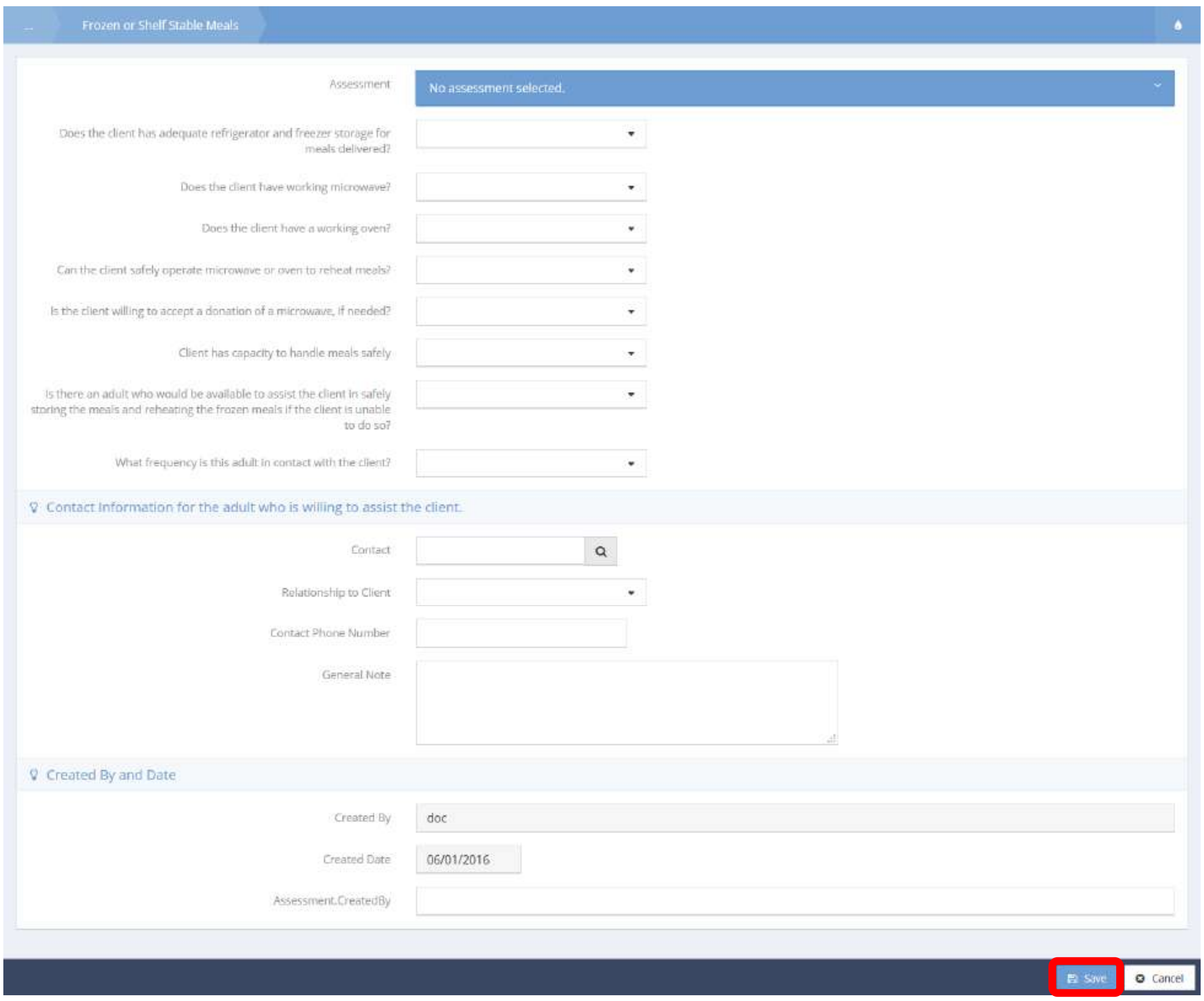
Navigation: Case Management>Assessments>Meals on Wheels



Select Frozen or Shelf Stable Meals from the Meals on Wheels – Assessments portion of the Meals on Wheels dashboard.

The Frozen or Shelf Stable Meals form displays.

Click the action gear icon associated with the desired assessment and select edit from the menu options or click the Add New button. The Frozen or Shelf Stable Meals form displays in either case.

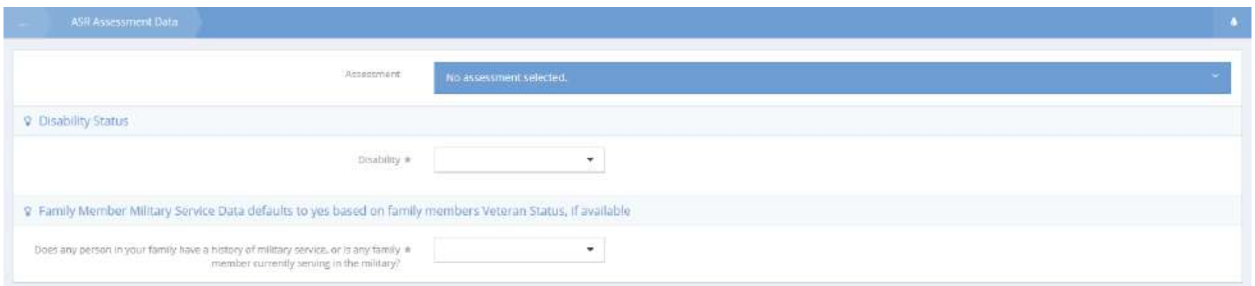


Select an existing or create a new Assessment. Fill remaining fields as desired. Click the Save button to save and exit.

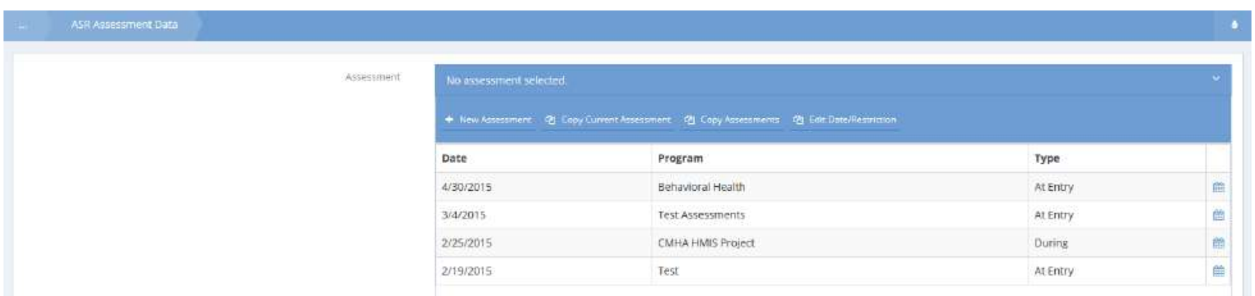
ASR Assessment

The ASR Assessment is used to record info necessary for the ASR report. To create a new assessment, click the **+ Add New** button.

The ASR Assessment Data form displays.

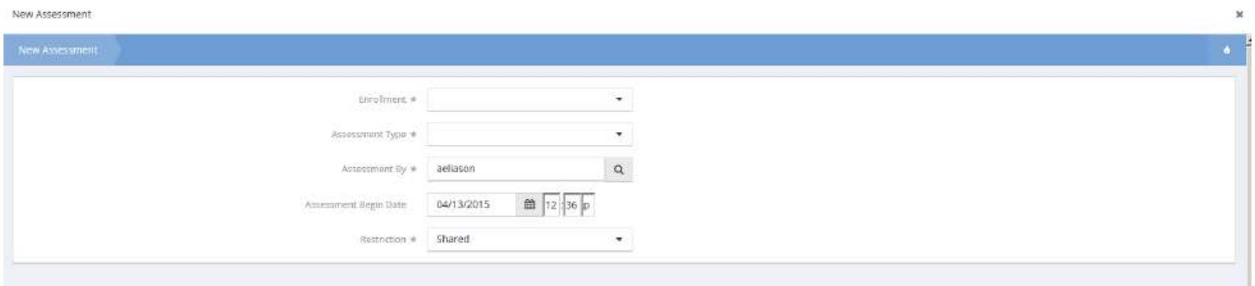


Click on the Assessment field. The Assessment field expands.

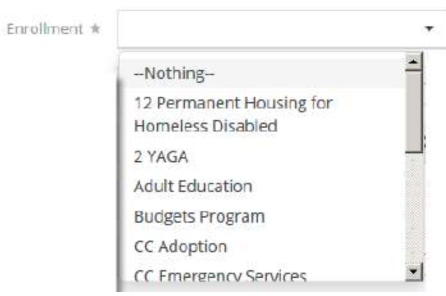


Click on the desired assessment or click on the **+ New Assessment** button.

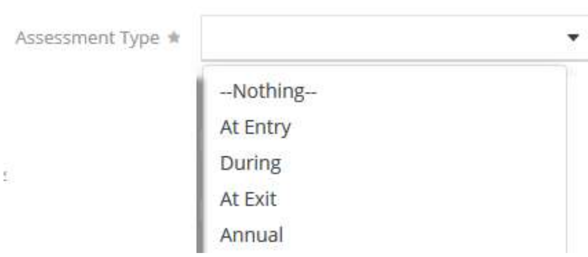
If new assessment is selected, the New Assessment form opens in a new window.



Click on the down arrow for Enrollment and select from the drop-down list.

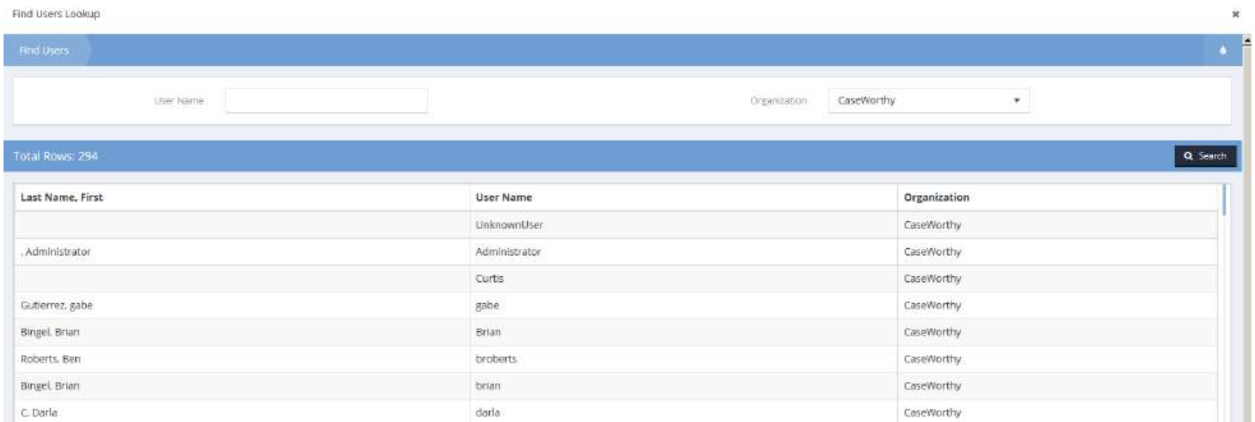


Click on the down arrow for Assessment Type and select from the drop-down list.



Click on the magnifying glass icon for the Assessment By field. The Assessment By Lookup form displays. Click on the down arrow icon for organization and select from the drop-down list.

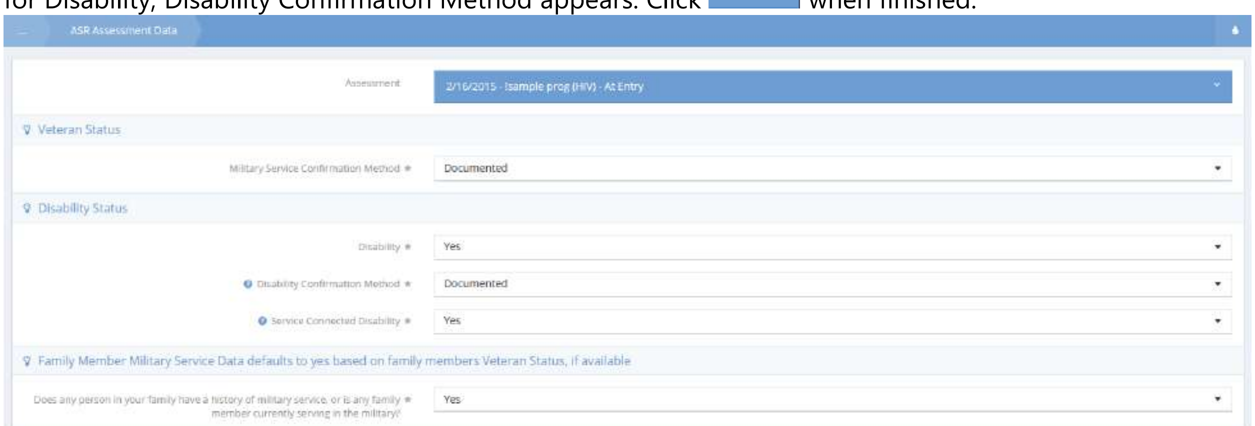
Enter any or all of the User Name and click on the Search button. Select the desired user from the list presented. The Find Users Lookup form closes.



Click on the down arrow icon for Restriction and select from the drop-down list.

Click Save to finish creating the new assessment.

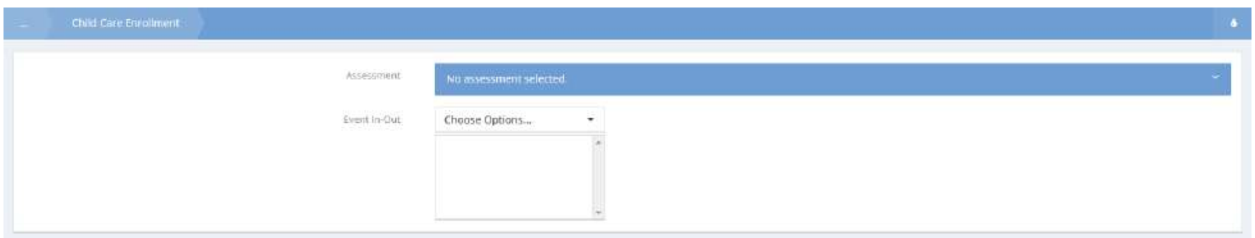
Select answers to all fields that appear. If the client is a veteran, additional fields appear. If Yes is selected for Disability, Disability Confirmation Method appears. Click Save when finished.



Event – Check-in and Out

To create a new Child Care Enrollment assessment, click the Add New button. The Child Care Enrollment form displays.

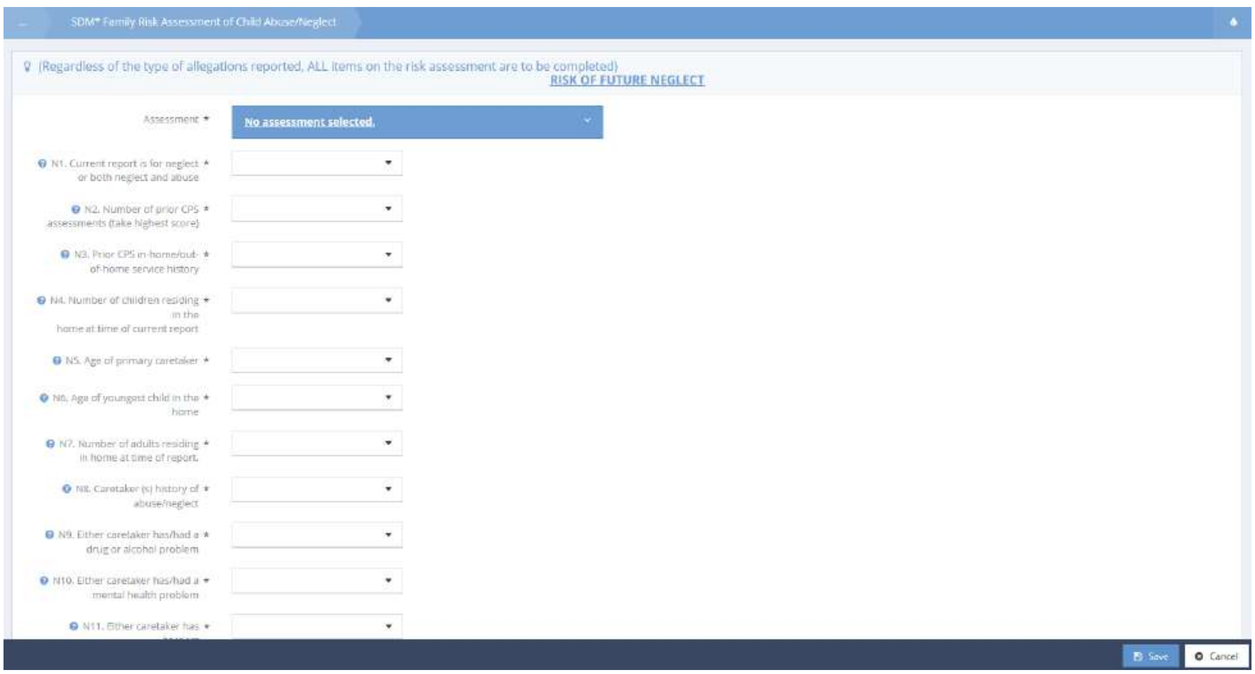
Click on the No assessment selected. area of the Assessment field and select an existing assessment or create a new one. Make any selections from the Event In-Out drop-down list and click Save when finished.



Child Abuse Risk

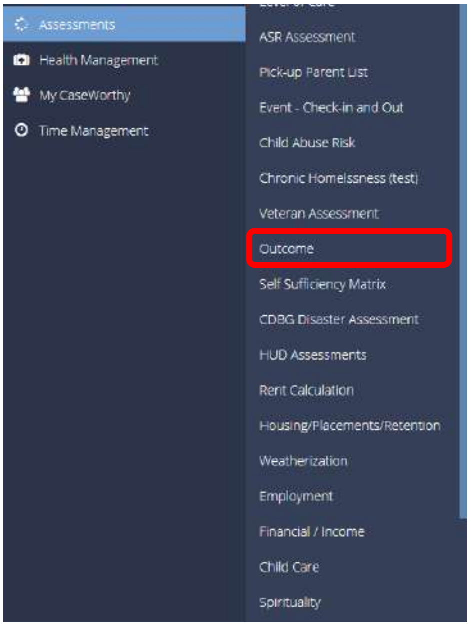
Objective: Complete an assessment for client risk of child abuse.

From the Child Abuse Risk Summary form, click the Add New button. The SDM* Family Risk Assessment of Child Abuse/Neglect form displays.



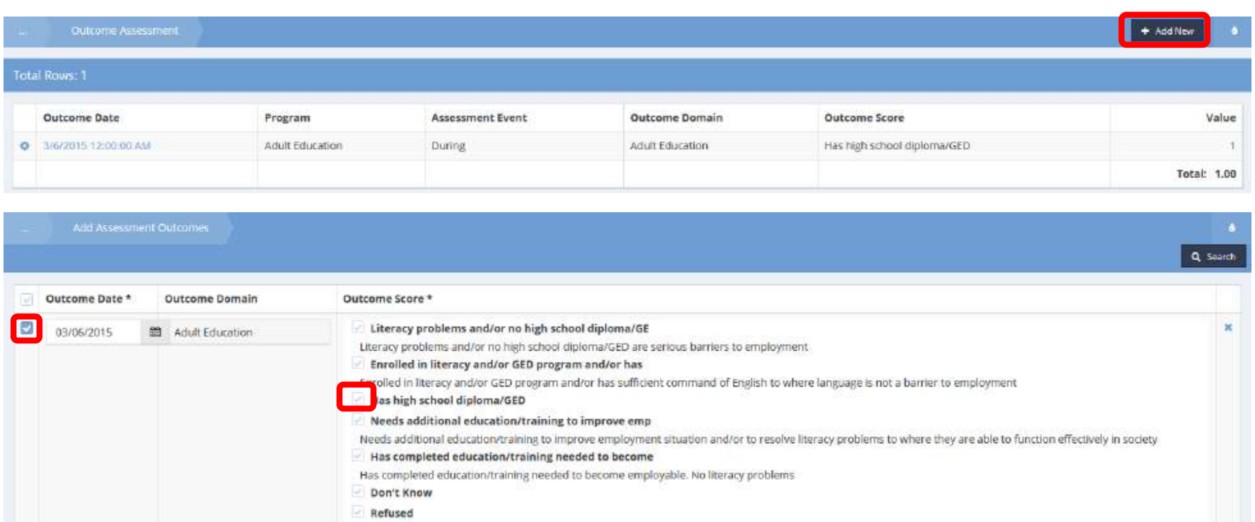
Click on the No assessment selected. area of the Assessment field and select an existing assessment or create a new one. Select answers for all fields and click Save when finished.

Outcome



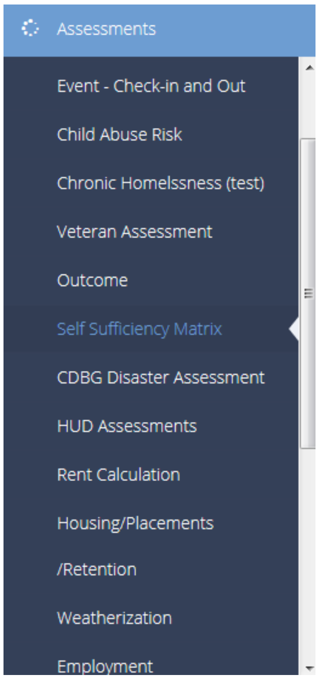
The next menu item in the Assessments menu group is the "Outcome (New)" summary form.

This form allows users to track a client's progress toward various outcomes as they relate to a given program. Click the checkbox  next to the desired outcome domain then select an outcome score using the associated checkbox icon.

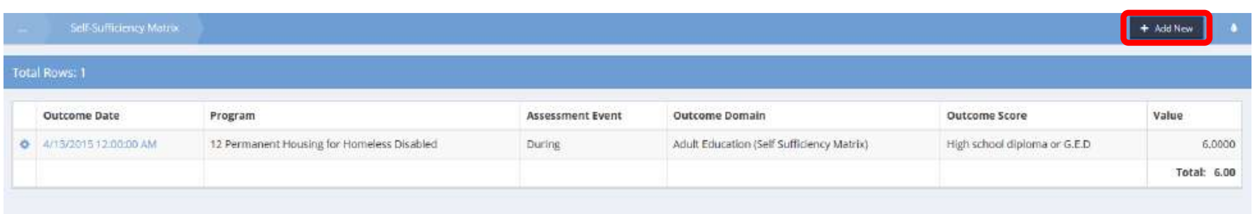


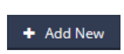
Self Sufficiency Matrix

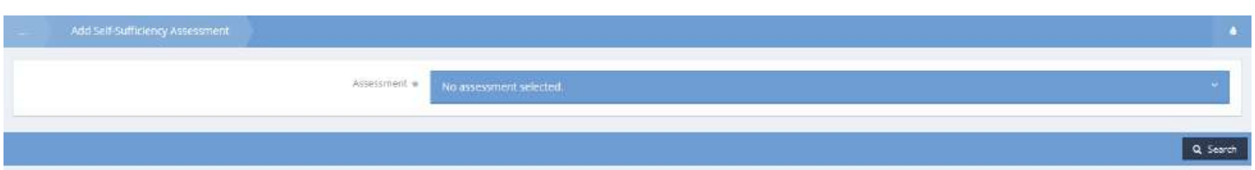
Objective: Complete assessments related to clients' self-sufficiency.



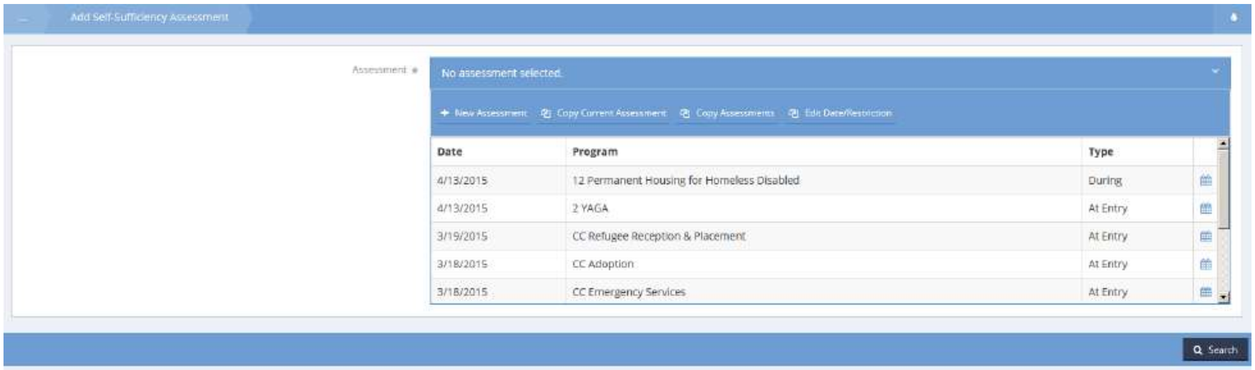
The Self Sufficiency Matrix form displays.



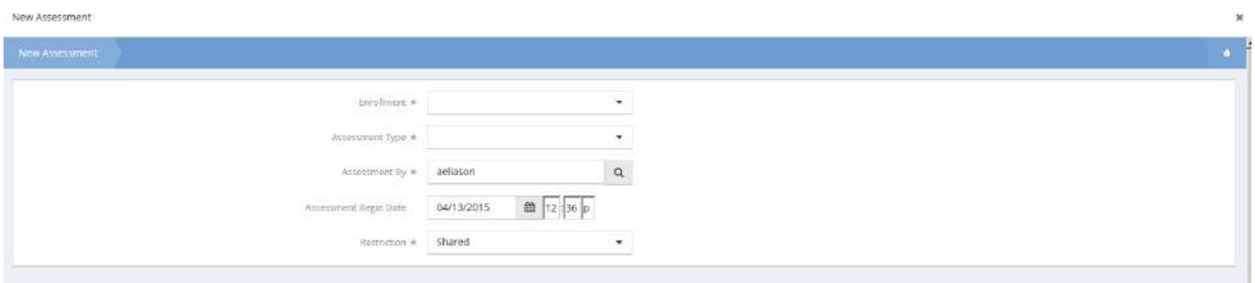
To add a new assessment event, click on the  button. The Add Self-Sufficiency Assessment form displays.



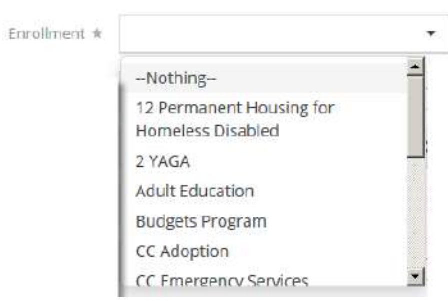
Click on the Assessment field. The Assessment field expands.



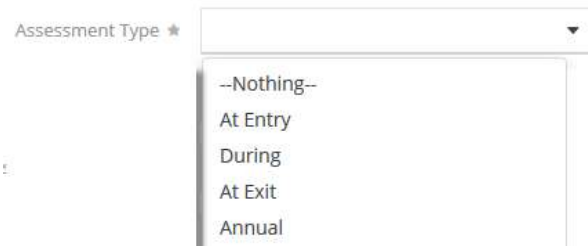
Click on the desired assessment or click on the + New Assessment button. If new assessment is selected, the New Assessment form opens in a new window.



Click on the down arrow for Enrollment and select from the drop-down list.

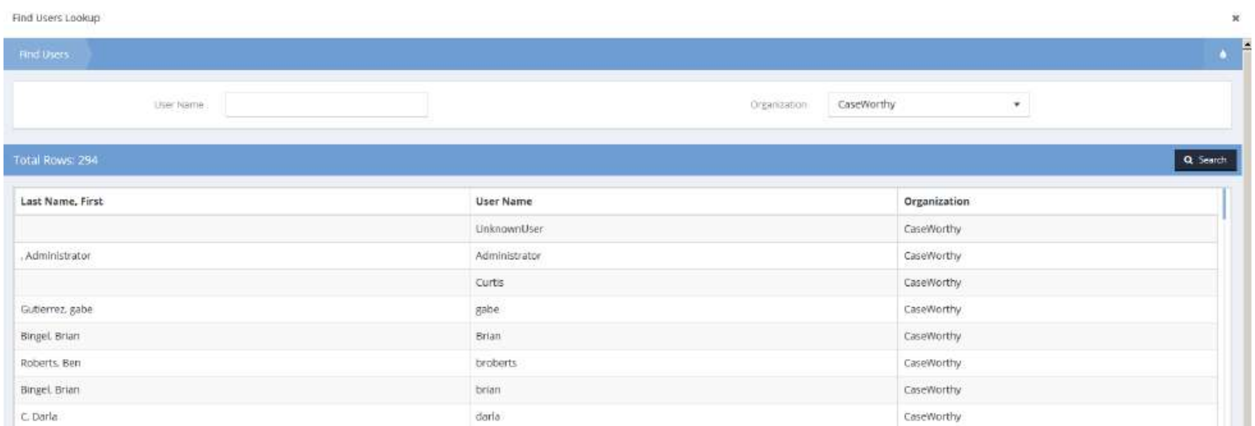


Click on the down arrow for Assessment Type and select from the drop-down list.

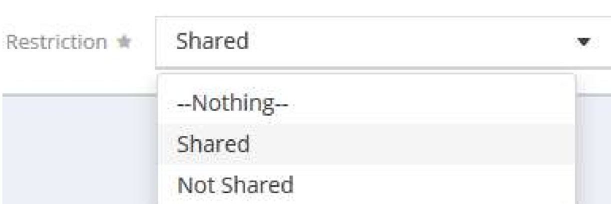


Click on the magnifying glass icon for the Assessment By field. The Assessment By Lookup form displays. Click on the down arrow icon for organization and select from the drop-down list.

Enter any or all of the User Name and click on the Search button. Select the desired user from the list presented. The Find Users Lookup form closes.



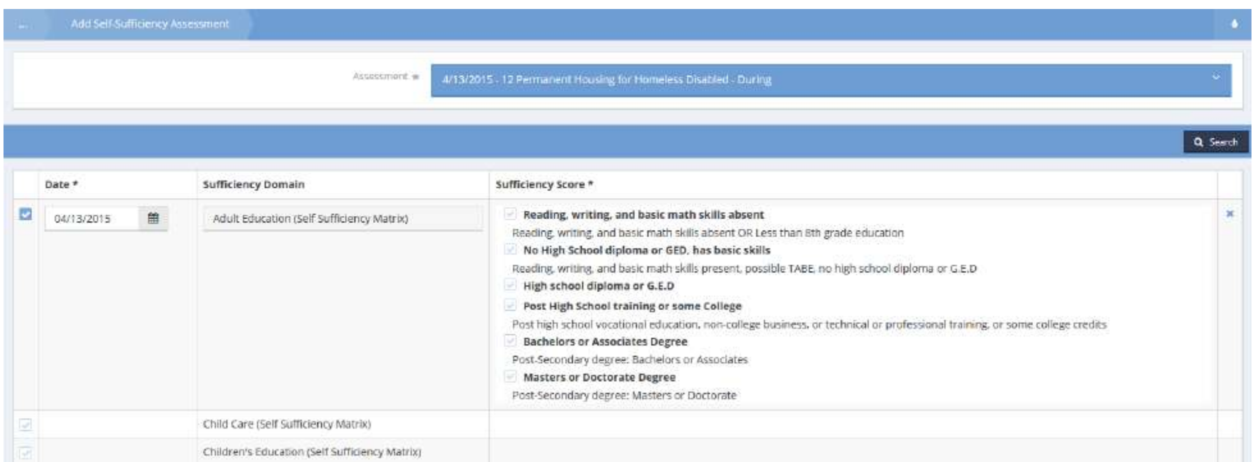
Click on the down arrow icon for Restriction and select from the drop-down list.



On the Add Self-Sufficiency Assessment form click on the Search button. A list of sufficiency domains appears.

Click on the clear checkbox for the desired sufficiency domain.

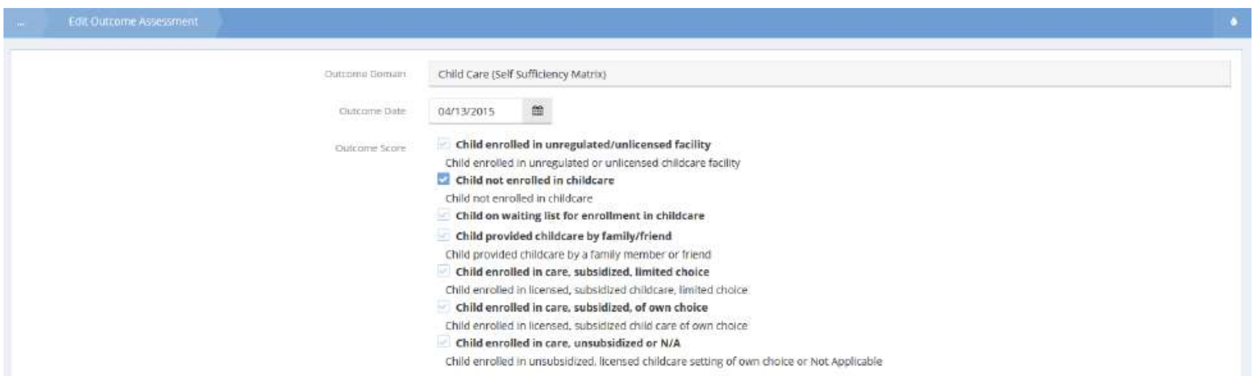
The row expands.



Select the appropriate check box. Repeat this process for all the sufficiency domains. Click on the Save button.

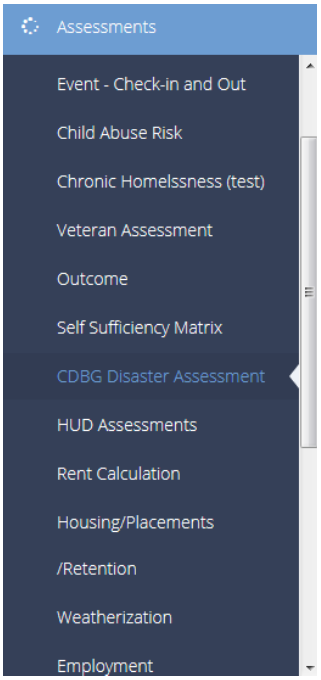
The Self Sufficiency Matrix summary redisplays.

To edit an outcome, click on the action gear icon for the desired outcome and select Edit from the pop-up menu that appears. The Outcome Assessment Edit form displays.



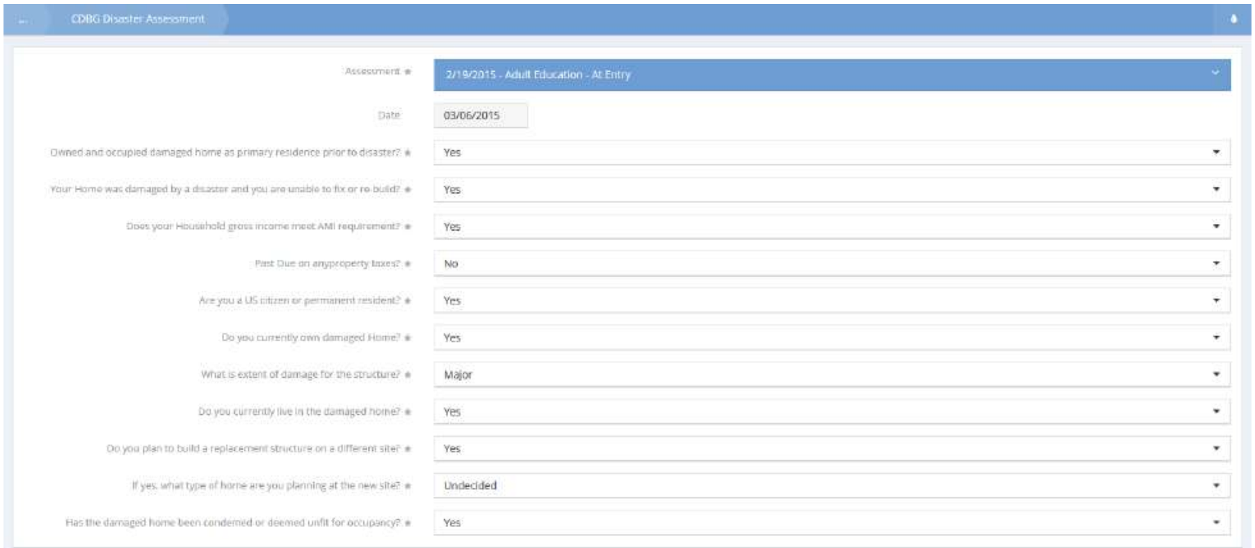
Make any desired changes and click on the Save button.

CDBG Disaster Assessment

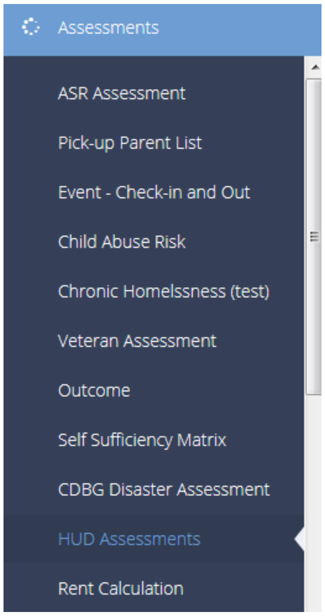


The next item on the Assessments menu is the "CDBG Disaster Assessment" summary form.

This form tracks all the details related to a client's home after a major disaster. The conditional logic displays different fields based on the client's answers to questions.


CDBG Disaster Assessment
Assessment
2/19/2015 - Adult Education - At Entry
Date
03/06/2015
Owned and occupied damaged home as primary residence prior to disaster?
Yes
Your Home was damaged by a disaster and you are unable to fix or re-build?
Yes
Does your Household gross income meet AMI requirement?
Yes
Past Due on anyproperty taxes?
No
Are you a US citizen or permanent resident?
Yes
Do you currently own damaged Home?
Yes
What is extent of damage for the structure?
Major
Do you currently live in the damaged home?
Yes
Do you plan to build a replacement structure on a different site?
Yes
If yes, what type of home are you planning at the new site?
Undecided
Has the damaged home been condemned or deemed unfit for occupancy?
Yes

HUD Assessments



The Assessment Manager

Each assessment form has a CaseWorthy™ Assessment Manager enabling the user to create a new assessment without a template, create a new assessment using a template, or copy and overwrite an existing assessment.

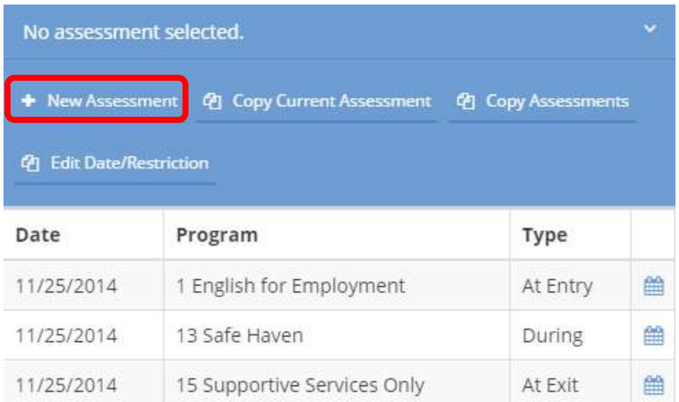
Within workflows, the system holds the information required to create the assessment. Users need not click on the Assessment Manager but just proceed with the assessment. However, when adding a new assessment from the HUD Assessments Dashboard, the form loads with "No assessment selected" allowing the user to setup the assessment as desired.

Before establishing an assessment, most HUD Assessments don't display any fields. During the process of selecting or creating an assessment, the user indicates which project enrollment and assessment event the assessment is for allowing the system to return the fields relevant to the particular scenario.

Create a Brand-New Assessment

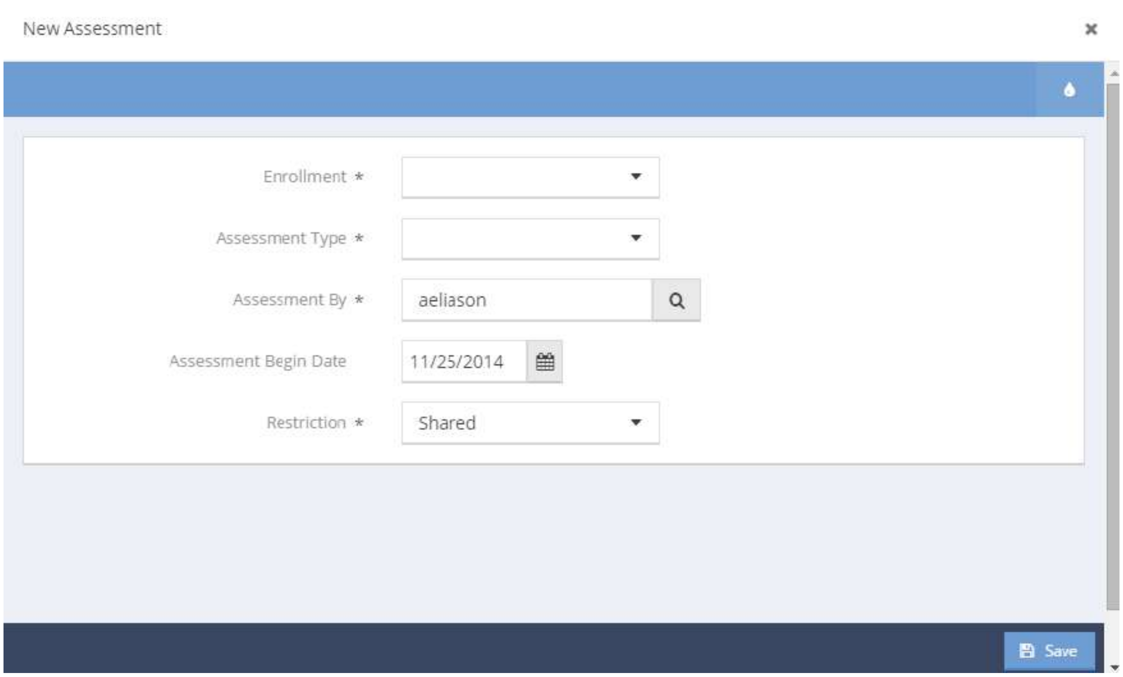
Click on the 

portion of the Assessment field. The field expands.



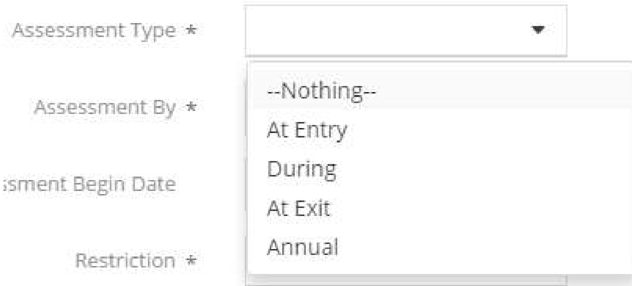
Click on the 

button to create a new assessment. The New Assessment form displays.



Click on the down arrow ▼ icon for Enrollment and select the desired program from the drop-down list that appears.

Click on the down arrow ▼ icon for Assessment Type.

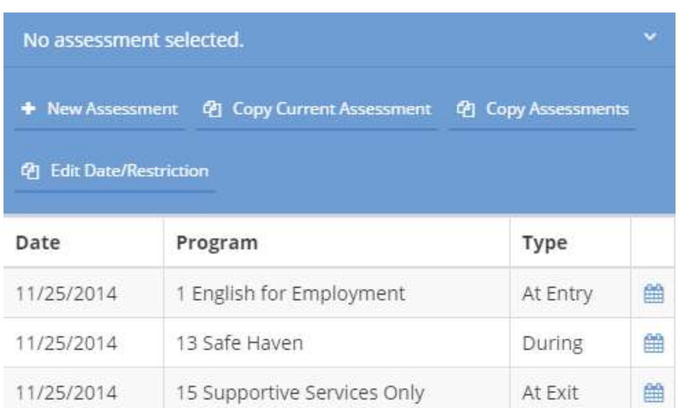


Select the desired value from the drop-down list that appears. Alter the assessment begin date or restriction if desired and click on the Save button.

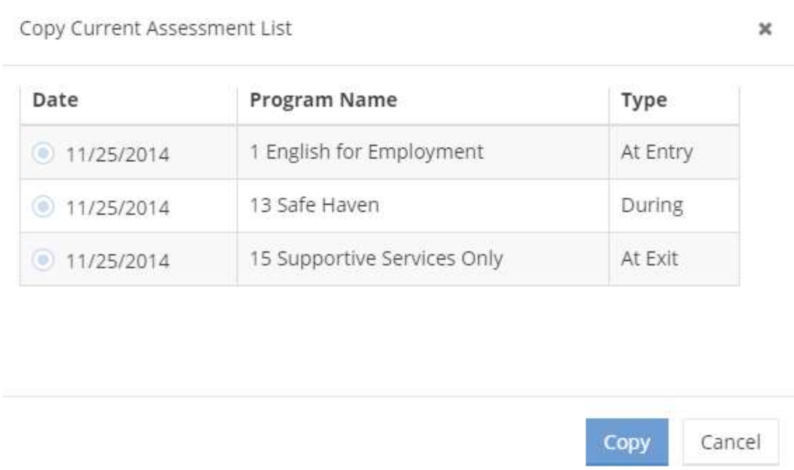
Once the assessment is established, the Assessment field shrinks and the assessment form displays the fields relevant to the project type, funding sources, client age, client relationship to head of household for this enrollment, and the assessment type.

Create a New Assessment Using a Template

Click on the No assessment selected. portion of the Assessment field. The field expands.

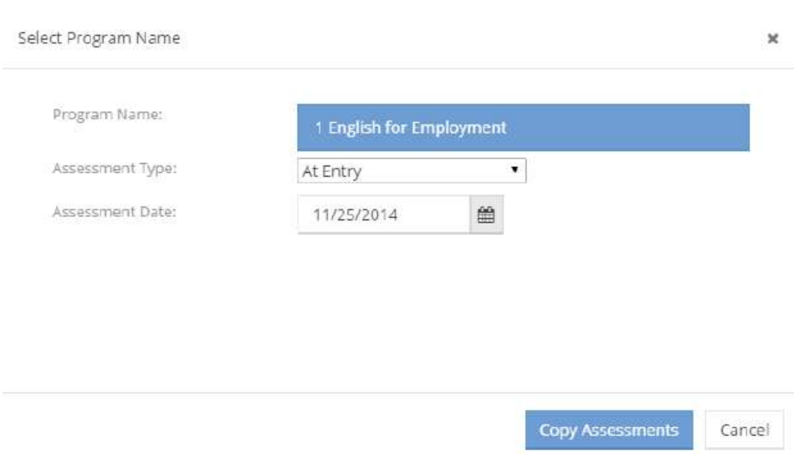


Click on the Copy Current Assessment button to create a new assessment. A list of the current client's previous assessments of the same type appears (e.g., if using a HUD Universal Assessment form, the list shows previous HUD Universal Assessments.)



Select the radio button next to the assessment to use it as a template for a new assessment. Verify that the button changes and click the Copy button.

To copy all assessments for a particular enrollment and assessment event (entry, during, exit or annual), rather than just the current assessment type, select Copy Assessments



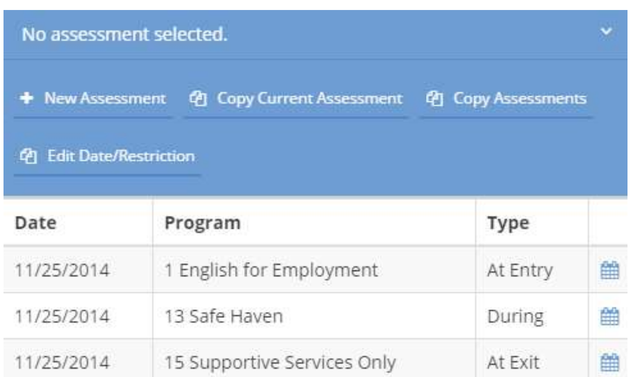
Indicate the desired assessment event for the new assessment and click the Copy Assessments button.

Once the assessment is established, the Assessment field shrinks and the assessment form displays the fields relevant to the project type, funding sources, client age, client relationship to head of household for this enrollment, and the assessment type. The fields auto-populate with the template assessment's answers. Review the answers and edit them as appropriate.

The date for the new assessment defaults to the current date. To change the date, click on the blue Assessment Manager bar, select Edit Date/Restriction when the Assessment Manager opens, and key in the new assessment date.

Copy and Overwrite an Existing Assessment

Click on the No assessment selected. portion of the Assessment field. The field expands.



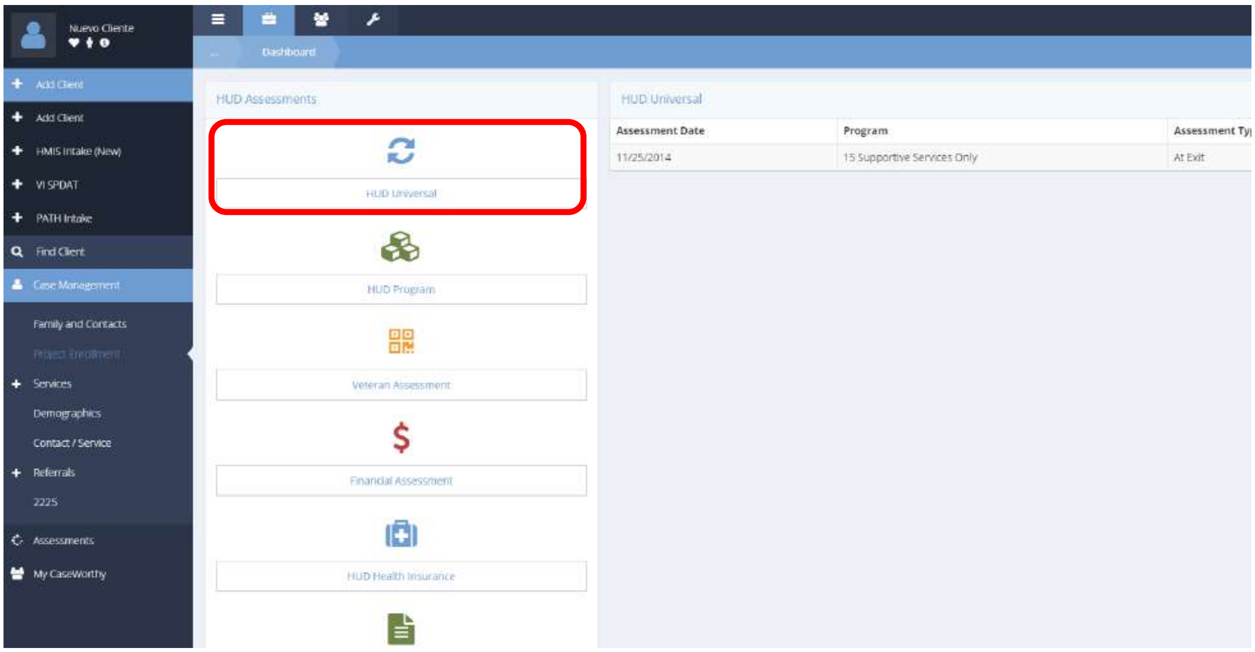
Select an assessment from the list to overwrite. The fields auto-populate with the previously saved assessment answers. Review the answers and edit them as appropriate. Click the Save button.

NOTE: ***The Chronic Homelessness assessment appears on the Assessments form, but is no longer a HUD assessment. Because of the HUD 2014 standards, the chronic homeless criteria and determination (including the high level disabling condition question) have been incorporated into the HUD Universal assessment as they are universally required, and the specific disabling condition questions now appear on the HUD Program assessment.***

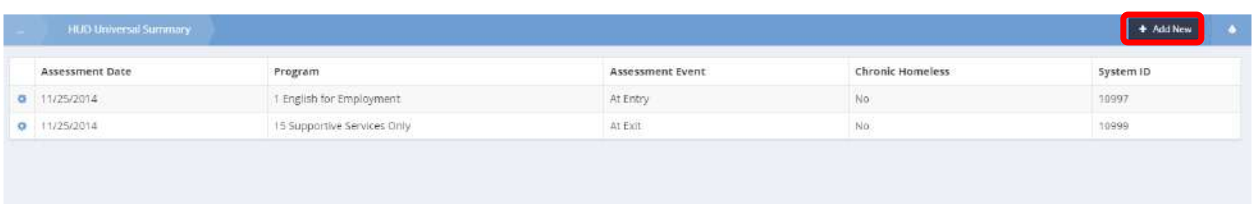
The following HUD Assessments are depicted under the HMIS All Features Role.

HUD Universal

Navigation: Case Management>Assessments>HUD Assessments Dashboard>HUD Assessments

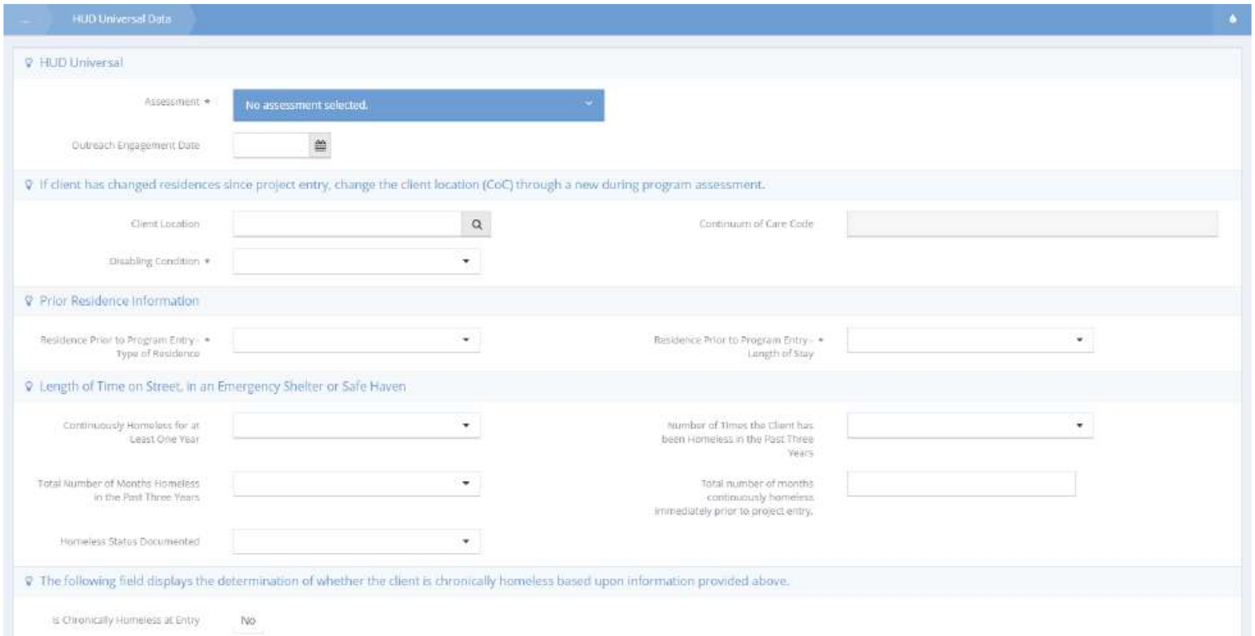


Click on the HUD Universal icon on the HUD Assessments menu. The HUD Universal Summary form displays a list of existing assessments.



To edit or delete an assessment, click on the action gear  icon associated with it. To begin a new assessment, click on the + Add New button.

The HUD Universal Data form displays.



Follow the steps in The Assessment Manager section of this document to create a new assessment or overwrite an existing one.

Once the assessment is established, the Assessment field shrinks and the HUD Universal Data form displays. The display of several fields on this form is dependent upon several factors including: client head of household status for this enrollment, client age, project type, funding partner, and assessment type. The image below is a compilation of all the fields possible on the form.

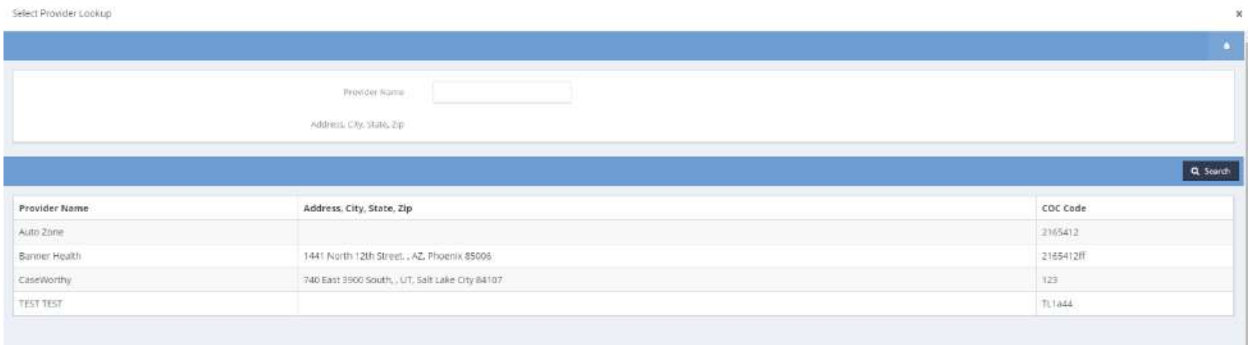
Outreach Engagement Date appears when the client is the head of household for this enrollment or an adult, the assessment type is during, the project type is Emergency Shelter, Homeless Outreach or Services Only and the funding partner is included in the list below with an active grant (i.e., Assessment date is between Grant Start Date and Grant End Date).

HUD: CoC – Homelessness Prevention (High Performing Comm. Only)
HUD: CoC – Permanent Supportive Housing
HUD: CoC - Rapid Re-Housing
HUD: CoC – Supportive Services Only
HUD: CoC – Transitional Housing
HUD: ESG – Emergency Shelter (operating and/or essential services)
HUD: ESG – Homelessness Prevention
HUD: ESG – Rapid Rehousing
HUD: ESG – Street Outreach
HUD: Rural Housing Stability Assistance Program
HUD: HOPWA – Hotel/Motel Vouchers
HUD: HOPWA – Housing Information
HUD: HOPWA – Permanent Housing (facility based or TBRA)

HUD: HOPWA – Permanent Housing Placement
HUD: HOPWA – Short-Term Rent, Mortgage, Utility assistance
HUD: HOPWA – Short-Term Supportive Facility
HUD: HOPWA – Transitional Housing (facility based or TBRA)
HUD: HUD/VASH

Client Served Location appears when the client is the head of household for this enrollment and the assessment type is entry or during. This field is associated with a lookup form.

Find Providers (Select) with CoC Code



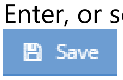
For a provider to appear on this form, a CoC code must be associated with it during setup. (See Provider/CoC Codes)

Disabling Condition appears when the client is an adult and the assessment type is entry.

Residence Prior to Project Entry - Type of Residence appears when the client is the head of household for this enrollment or an adult, and the assessment type is entry.

Length of Time on Street, in an Emergency Shelter or Safe Haven section appears when the client is the head of household for this enrollment or an adult, and the assessment type is entry.

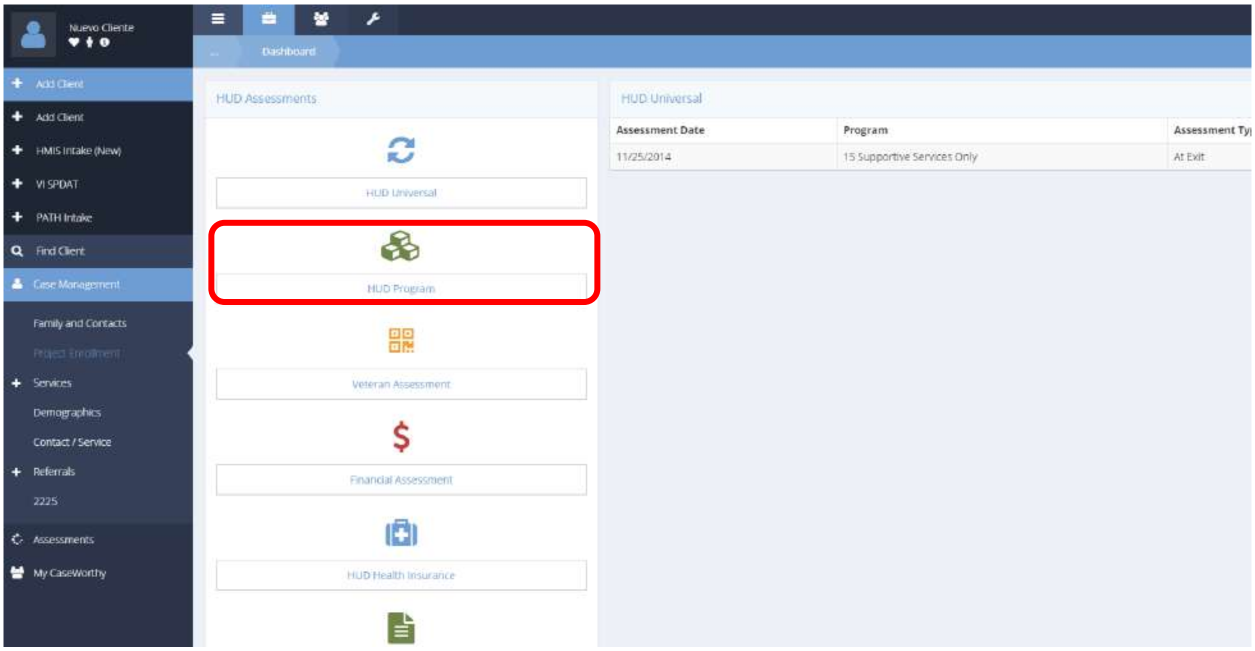
Is Chronically Homeless at Entry appears when the client is the head of household for this enrollment or an adult, and the assessment type is entry.

Enter, or select from drop-down lists, values for each field presented on the form and click on the 

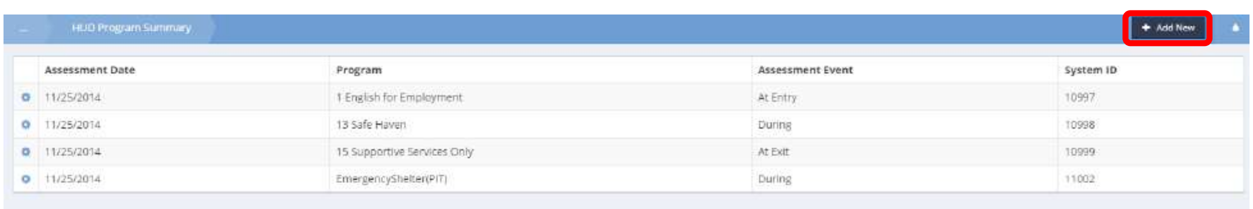
button.

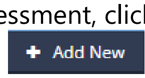
HUD Program

Navigation: Case Management>Assessments>HUD Assessments Dashboard>HUD Assessments



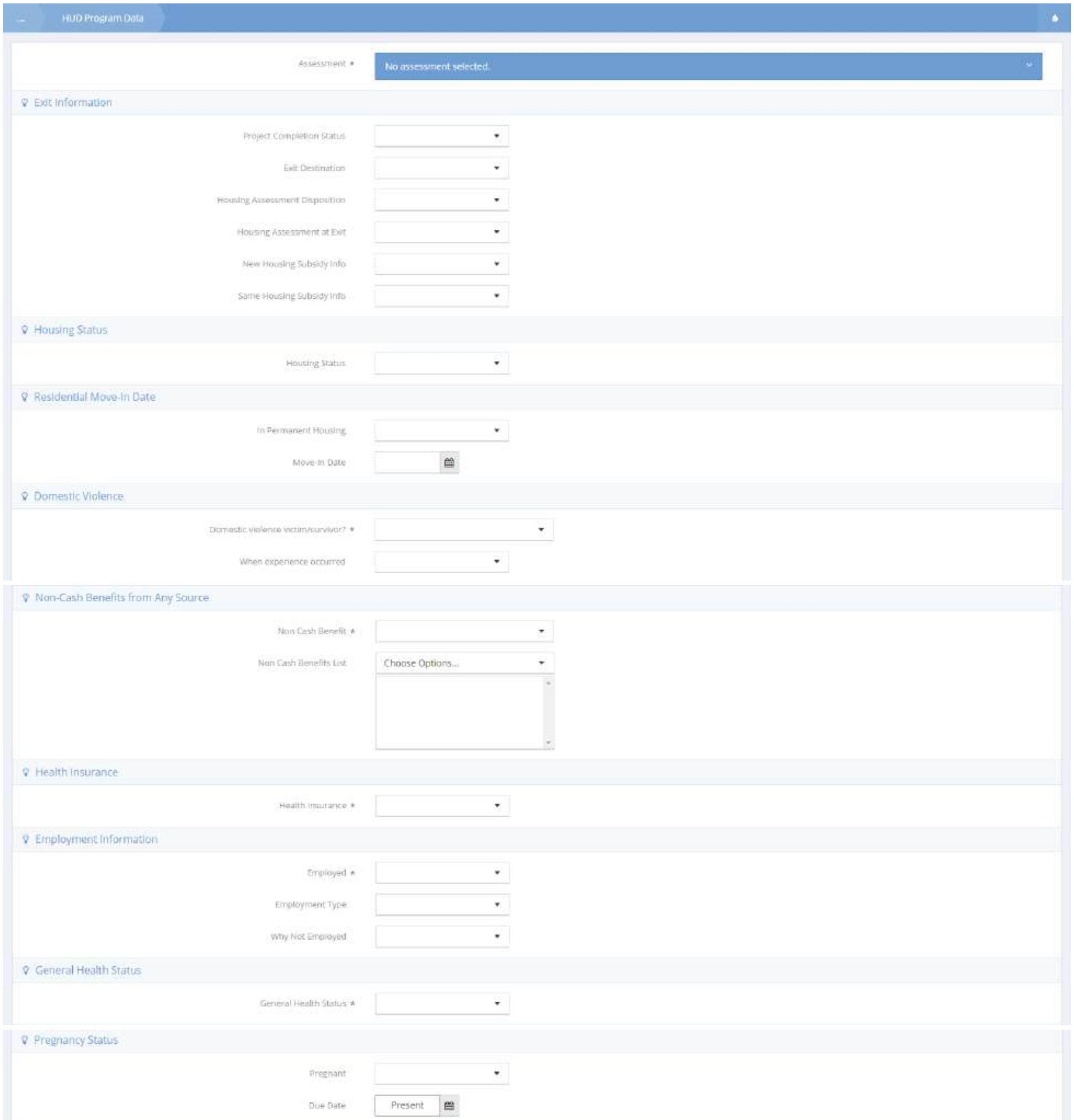
Click on the HUD Program icon on the HUD Assessments menu. The HUD Program Summary form displays a list of existing assessments.

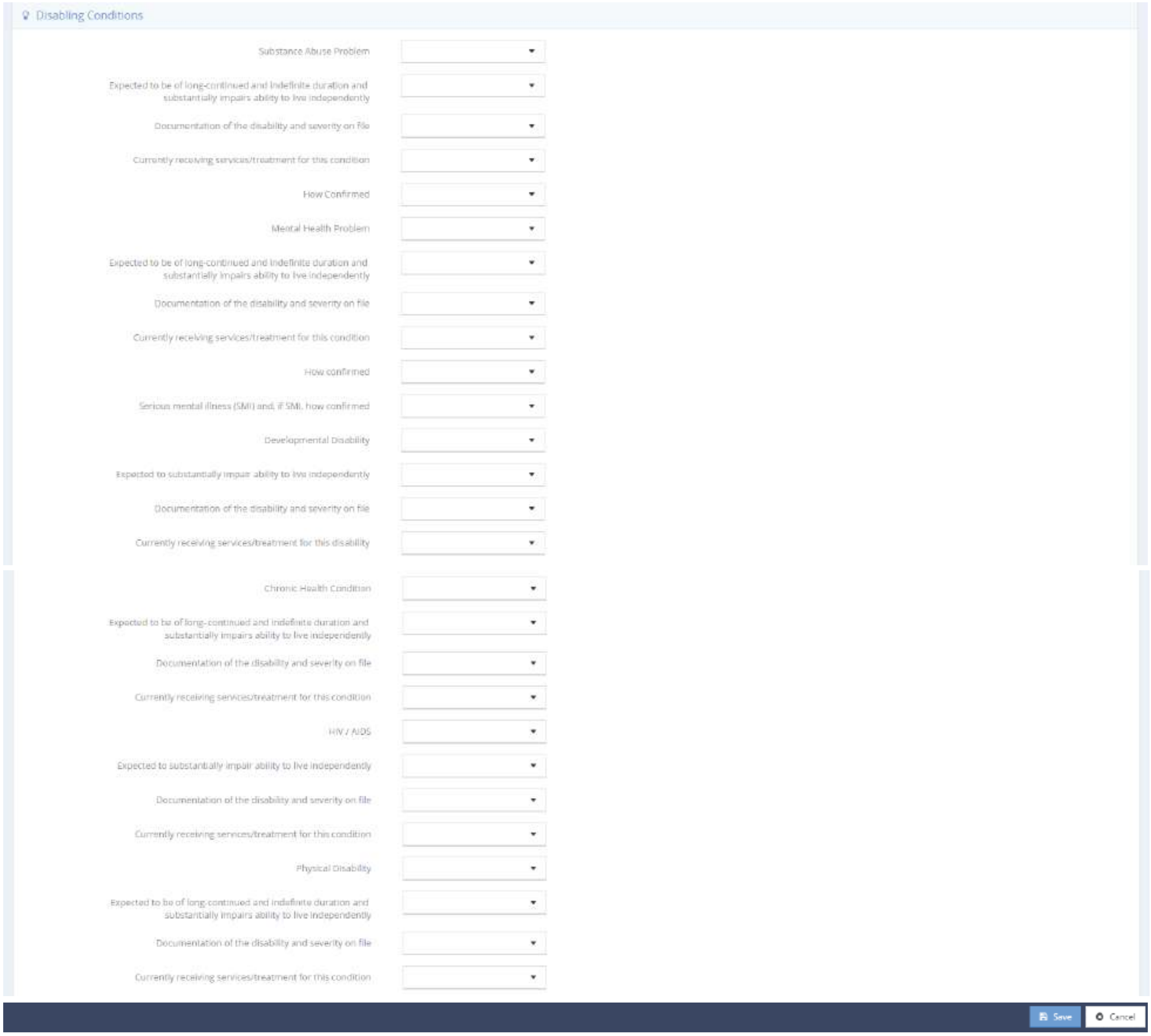


To edit or delete an assessment, click on the action gear  icon associated with it. To begin a new assessment, click on the  button. The Program Assessment (Input) New form displays.

Follow the steps in The Assessment Manager section of this document to create a new assessment or overwrite an existing one.

Once the assessment is established, the Assessment field shrinks and the Program Assessment (Input) New form displays. The display of several fields on this form is dependent upon several factors including client head of household status for this enrollment, client age, project type, funding partner, assessment type and the answers given for previous questions. The image below is a compilation of all the fields possible on the form.





Project Completion Status appears when the assessment type is exit, the project type is Emergency Shelter, Transitional Housing or Homeless Prevention and the program funder is HHS: RHY – Basic Center Program (prevention and shelter), HHS: RHY – Maternity Group Home for Pregnant and Parenting Youth, HHS: RHY – Transitional Living Program or HHS: RHY – Demonstration Project.

Housing Assessment Disposition appears when the client is the head of household for this enrollment, the assessment type is exit, the project type is Coordinated Assessment and the funder is in the list below with an active grant (i.e., Assessment date is between Grant Start Date and Grant End Date).

HUD: CoC – Homelessness Prevention (High Performing Comm. Only)
HUD: CoC – Permanent Supportive Housing
HUD: CoC - Rapid Re-Housing
HUD: CoC – Supportive Services Only
HUD: CoC – Transitional Housing
HUD: ESG – ES (operating and/or essential services)
HUD: ESG – Homelessness Prevention
HUD: ESG – Rapid Rehousing
HUD: ESG – Street Outreach

Housing Assessment at Exit appears when the assessment type is exit, the project type is Emergency Shelter (ES), Transitional Housing (TH), PH - Permanent Supportive Housing (disability required for entry), Services Only or Homeless Prevention and the funder is in the list below with an active grant (i.e., Assessment date is between Grant Start Date and Grant End Date).

HUD: CoC – Homelessness Prevention (High Performing Comm. Only)
HUD: ESG – Homelessness Prevention
HUD: HOPWA – Housing Information
HUD: HOPWA – PH (facility based or TBRA)
HUD: HOPWA – Permanent Housing Placement
HUD: HOPWA – Short-Term Rent, Mortgage, Utility Assistance
HUD: HOPWA – Short-Term Supportive Facility
HUD: HOPWA–Transitional Housing (facility based or TBRA)
HUD: HUD/VASH

Housing Status appears when the client is the head of household for this enrollment or an adult, the assessment type is entry and the funder is in the list below with an active grant (i.e., Assessment date is between Grant Start Date and Grant End Date).

HUD: Rural Housing Stability Assistance Program
HUD: HOPWA – Hotel/Motel Vouchers
HUD: HOPWA – Housing Information
HUD: HOPWA – PH (facility based or TBRA)
HUD: HOPWA – Permanent Housing Placement
HUD: HOPWA – Short-Term Rent, Mortgage, Utility Assistance
HUD: HOPWA – Short-Term Supportive Facility
HUD: HOPWA–Transitional Housing (facility based or TBRA)
HHS: PATH – Street Outreach & SS Only

Move-In Date appears when the assessment type is entry or during, the project type is PH - Rapid Re-Housing (RRH) and the funder is HUD: CoC - Rapid Re-Housing, HUD: ESG – Rapid Rehousing or HUD: HOPWA – Hotel/Motel Vouchers.

Domestic Violence appears when the client is the head of household for this enrollment or an adult, the assessment type is entry or during and the funder is in the list below with an active grant (i.e., Assessment date is between Grant Start Date and Grant End Date).

HUD: CoC – Homelessness Prevention (High Performing Comm. Only)
HUD: CoC – Permanent Supportive Housing
HUD: CoC - Rapid Re-Housing
HUD: CoC – Supportive Services Only
HUD: CoC – Transitional Housing
HUD: ESG – ES (operating and/or essential services)
HUD: ESG – Homelessness Prevention
HUD: ESG – Rapid Rehousing
HUD: ESG – Street Outreach
HUD: Rural Housing Stability Assistance Program
HUD: HOPWA – Hotel/Motel Vouchers
HUD: HOPWA – Housing Information
HUD: HOPWA – PH (facility based or TBRA)
HUD: HOPWA – Permanent Housing Placement
HUD: HOPWA – Short-Term Rent, Mortgage, Utility Assistance
HUD: HOPWA – Short-Term Supportive Facility
HUD: HOPWA–Transitional Housing (facility based or TBRA)
HUD: HUD/VASH

Non-Cash Benefits appears when the client is the head of household for this enrollment or an adult and the funder is in the list below with an active grant (i.e., Assessment date is between Grant Start Date and Grant End Date).

HUD: CoC – Homelessness Prevention (High Performing Comm. Only)
HUD: CoC – Permanent Supportive Housing
HUD: CoC - Rapid Re-Housing
HUD: CoC – Supportive Services Only
HUD: CoC – Transitional Housing
HUD: ESG – ES (operating and/or essential services)
HUD: ESG – Homelessness Prevention
HUD: ESG – Rapid Rehousing
HUD: ESG – Street Outreach
HUD: Rural Housing Stability Assistance Program
HUD: HOPWA – Hotel/Motel Vouchers
HUD: HOPWA – Housing Information
HUD: HOPWA – PH (facility based or TBRA)
HUD: HOPWA – Permanent Housing Placement
HUD: HOPWA – Short-Term Rent, Mortgage, Utility Assistance
HUD: HOPWA – Short-Term Supportive Facility
HUD: HOPWA–Transitional Housing (facility based or TBRA)
HUD: HUD/VASH
HHS: PATH – Street Outreach & SS Only
HHS: RHY – Maternity Group Home for Pregnant and Parenting Youth

HHS: RHY – Transitional Living Program
HHS: RHY – Demonstration Project
VA: Supportive Services for Veteran Families

Health Insurance appears when the funder is in the list below with an active grant (i.e., Assessment date is between Grant Start Date and Grant End Date).

HUD: CoC – Homelessness Prevention (High Performing Comm. Only)
HUD: CoC – Permanent Supportive Housing
HUD: CoC - Rapid Re-Housing
HUD: CoC – Supportive Services Only
HUD: CoC – Transitional Housing
HUD: ESG – ES (operating and/or essential services)
HUD: ESG – Homelessness Prevention
HUD: ESG – Rapid Rehousing
HUD: ESG – Street Outreach
HUD: Rural Housing Stability Assistance Program
HUD: HOPWA – Hotel/Motel Vouchers
HUD: HOPWA – Housing Information
HUD: HOPWA – PH (facility based or TBRA)
HUD: HOPWA – Permanent Housing Placement
HUD: HOPWA – Short-Term Rent, Mortgage, Utility Assistance
HUD: HOPWA – Short-Term Supportive Facility
HUD: HOPWA–Transitional Housing (facility based or TBRA)
HUD: HUD/VASH
HHS: PATH – Street Outreach & SS Only
HHS: RHY – Basic Center Program (prevention and shelter)
HHS: RHY – Demonstration Project
VA: Supportive Services for Veteran Families

Employment Status appears when the client is the head of household for this enrollment or a youth, the assessment type is entry or exit, the project type is Emergency Shelter (ES), Transitional Housing (TH) or Homeless Prevention and the funder is HHS: RHY – Basic Center Program (prevention and shelter), HHS: RHY – Maternity Group Home for Pregnant and Parenting Youth, HHS: RHY – Transitional Living Program or HHS: RHY – Demonstration Project.

General Health Status appears when the client is the head of household for this enrollment or a youth, the assessment type is entry or exit, the project type is Emergency Shelter (ES), Transitional Housing (TH) or Homeless Prevention and the funder is HHS: RHY – Basic Center Program (prevention and shelter), HHS: RHY – Maternity Group Home for Pregnant and Parenting Youth, HHS: RHY – Transitional Living Program or HHS: RHY – Demonstration Project.

Pregnancy Status appears when gender is not male or transgender male to female, the head of household for this enrollment or a youth, the assessment type is entry or during, the project type is Emergency Shelter (ES), Transitional Housing (TH) or Homeless Prevention and the funder is HHS: RHY – Basic Center Program (prevention and shelter), HHS: RHY – Maternity Group Home for Pregnant and

Parenting Youth, HHS: RHY – Transitional Living Program, HHS: RHY – Street Outreach Project or HHS: RHY – Demonstration Project.

Substance Abuse, Mental Health Problem, Developmental Disability, Chronic Health Condition and Physical Disability appear when the assessment type is entry, during or exit and the funder is in the list below with an active grant (i.e., Assessment date is between Grant Start Date and Grant End Date).

HUD: CoC – Homelessness Prevention (High Performing Comm. Only)
HUD: CoC – Permanent Supportive Housing
HUD: CoC - Rapid Re-Housing
HUD: CoC – Supportive Services Only
HUD: CoC – Transitional Housing
HUD: ESG – ES (operating and/or essential services)
HUD: ESG – Homelessness Prevention
HUD: ESG – Rapid Rehousing
HUD: ESG – Street Outreach
HUD: Rural Housing Stability Assistance Program
HUD: HOPWA – Hotel/Motel Vouchers
HUD: HOPWA – Housing Information
HUD: HOPWA – PH (facility based or TBRA)
HUD: HOPWA – Permanent Housing Placement
HUD: HOPWA – Short-Term Rent, Mortgage, Utility Assistance
HUD: HOPWA – Short-Term Supportive Facility
HUD: HOPWA–Transitional Housing (facility based or TBRA)
HUD: HUD/VASH
HHS: PATH – Street Outreach & SS Only
HHS: RHY – Basic Center Program (prevention and shelter)
HHS: RHY – Maternity Group Home for Pregnant and Parenting Youth
HHS: RHY – Transitional Living Program
HHS: RHY – Street Outreach Project
HHS: RHY – Demonstration Project

HIV/AIDS appears when the assessment type is entry, during or exit and the funder is in the list below with an active grant (i.e., Assessment date is between Grant Start Date and Grant End Date)

HUD: CoC – Homelessness Prevention (High Performing Comm. Only)
HUD: CoC – Permanent Supportive Housing
HUD: CoC - Rapid Re-Housing
HUD: CoC – Supportive Services Only
HUD: CoC – Transitional Housing
HUD: ESG – ES (operating and/or essential services)
HUD: ESG – Homelessness Prevention
HUD: ESG – Rapid Rehousing
HUD: ESG – Street Outreach
HUD: Rural Housing Stability Assistance Program
HUD: HOPWA – Hotel/Motel Vouchers
HUD: HOPWA – Housing Information

HUD: HOPWA – PH (facility based or TBRA)
HUD: HOPWA – Permanent Housing Placement
HUD: HOPWA – Short-Term Rent, Mortgage, Utility Assistance
HUD: HOPWA – Short-Term Supportive Facility
HUD: HOPWA–Transitional Housing (facility based or TBRA)
HUD: HUD/VASH
HHS: PATH – Street Outreach & SS Only

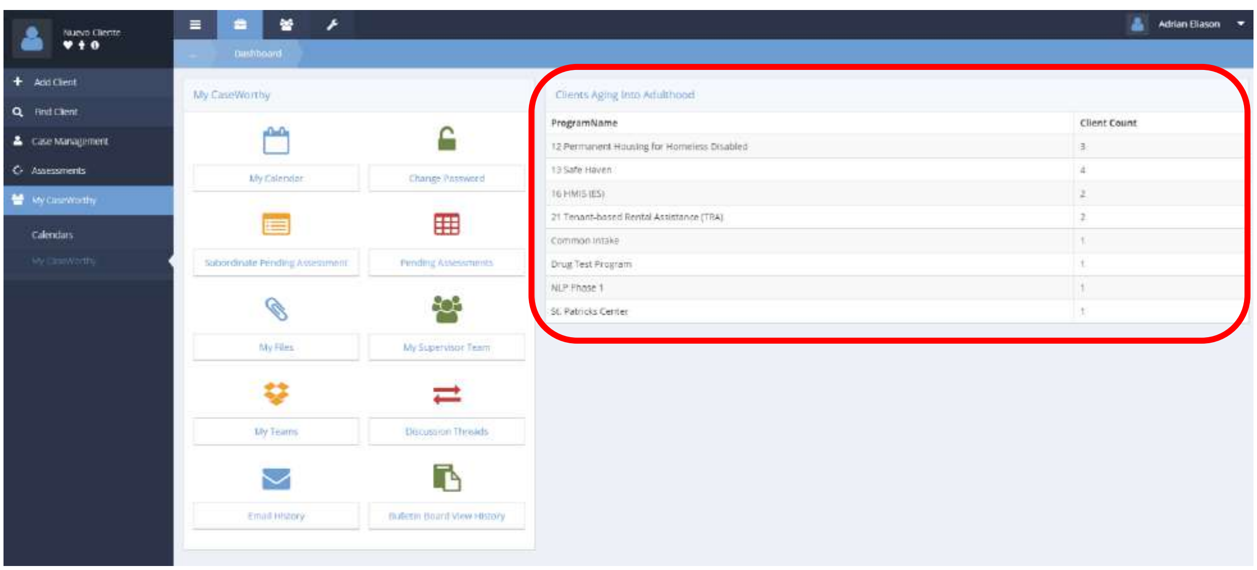
NOTE: ***Worst Housing Situation data element is not yet active as of release of CaseWorthy™ 5.0.1, per HUD Standards. The column does exist in the database and can be added to this assessment form upon receipt of federal funding by HUD for RHSAP.***

Enter, or select from drop-down lists, values for each field presented on the form and click on the Save button.

NOTE: ***HUD 2014 standards require some assessments to be altered based upon client age. To facilitate tracking and managing youths reaching their 18th birthday during program enrollment, CaseWorthy™ presents a list on the HMIS Clients Aged Into Adulthood Since Entry form.***

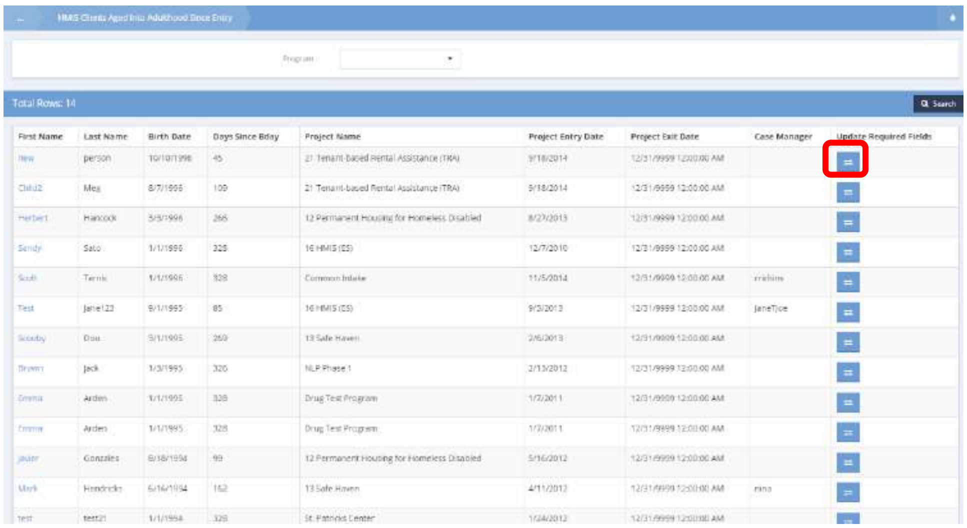
Clients Aged into Adulthood

Navigation: Case Management>My CaseWorthy



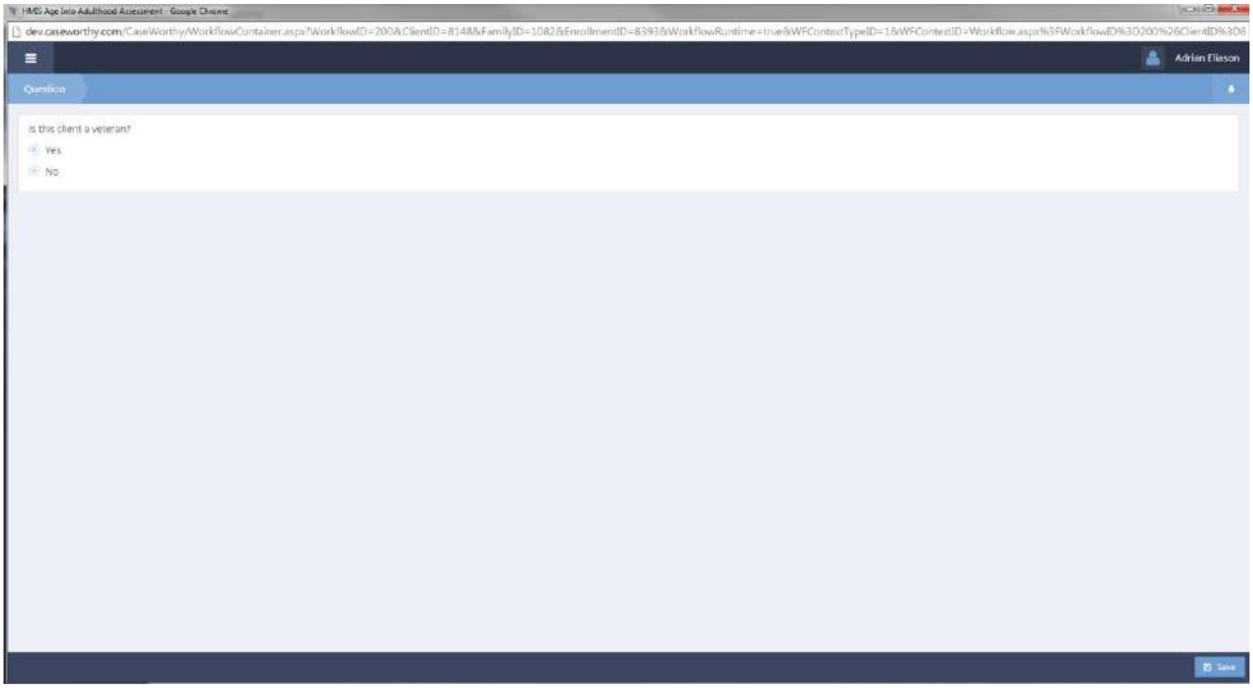
A query table presents on the My CaseWorthy dashboard with a list of clients aging into adulthood. Click on one of the rows of information on the table. The HMIS Clients Aged Into Adulthood Since Entry form displays.

HMIS Clients Aged Into Adulthood Since Entry



Click on the update  icon to process the client into adulthood in the system.

A workflow opens in a new window.

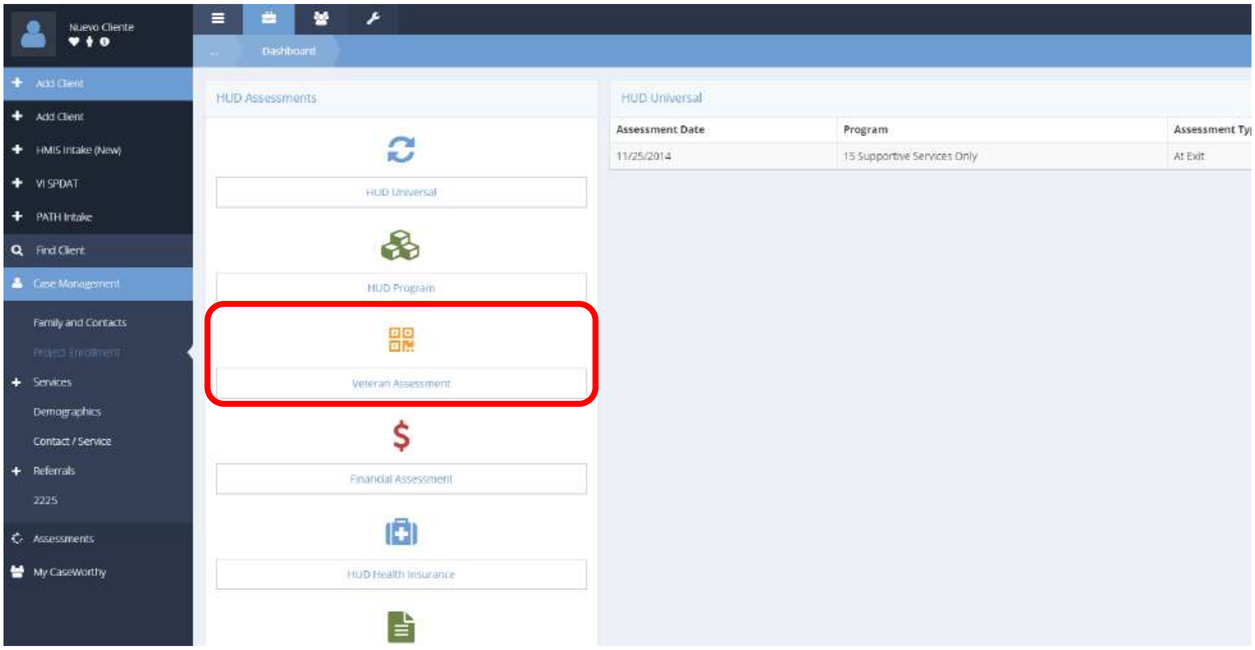


Answer the veteran status question and click on the Save button. If "Yes", the HMIS Client Demographics form displays. Update the veteran status field. If "No", the workflow skips to The Aged Into Adulthood Assessment form.

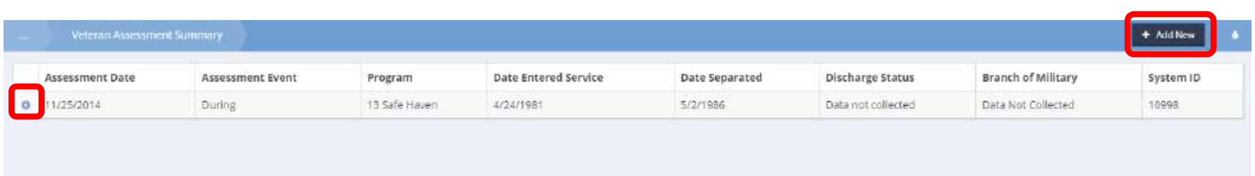
Aged Into Adulthood Assessment

This form includes several dependent fields. An answer of "Yes" to Non-Cash Benefits from Any Source causes the Indicate all non-cash benefit sources that apply filed to display. Click on the down arrow icon for Choose Options and select all applicable answers from the multi-select list that appears. Click on the Add Selected button. An answer of "Yes" to Covered by Health Insurance causes the Indicate all health insurance sources that apply field to display. Click on the down arrow for Choose Options and select all applicable answers from the multi-select list that appears. Click on the Add Selected button. An answer of "No" to Covered by Health Insurance causes the Reason no health insurance field to display. Click on the down arrow ▼ icon and select the appropriate response. When finished with the form, click on the Save button. The client drops from the list on the HMIS Clients Aged Into Adulthood Since Entry form. Click on the ✔ Done button.

Veteran Assessment



Click on the Veteran Assessment icon on the HUD Assessments menu. The Veteran Assessment Summary form displays a list of existing assessments.

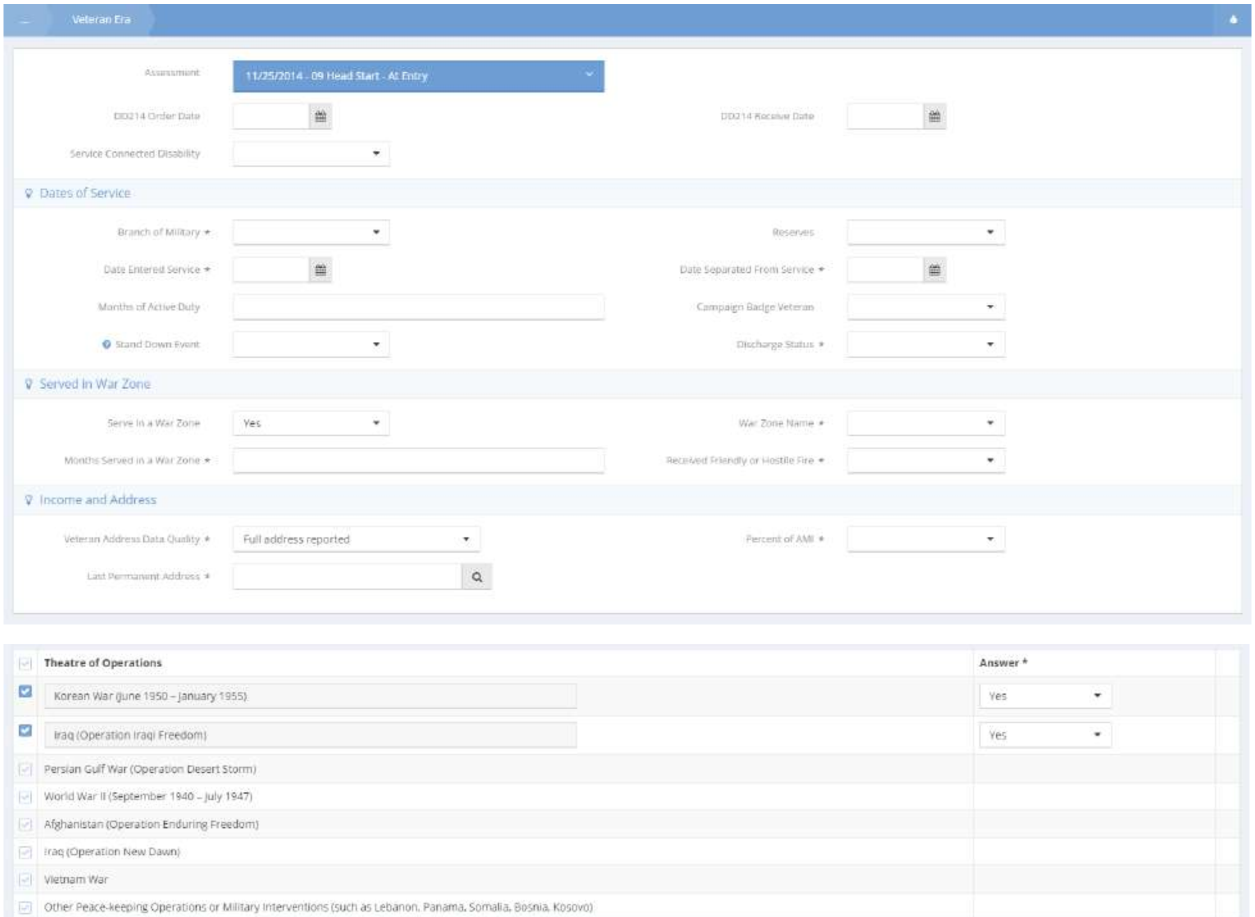


To edit or delete an assessment, click on the action gear icon associated with it. To begin a new assessment, click on the **+ Add New** button. The Veteran Assessment Add form displays.

Follow the steps in [The Assessment Manager] section of this document to create a new assessment or overwrite an existing one.

Once the assessment is established, the Assessment field shrinks and the Veteran Assessment Add form displays. The Veteran Assessment Add form lacks rules regarding project type and funding source because each data element in the assessment has the same or very similar requirements. Therefore, the CaseWorthy™ system administrator can only link the assessment to relevant programs and more nuanced rules on the assessment form are unnecessary. Age conditions are omitted under the assumption that all veterans are older than 18.

The image below is a compilation of all the fields possible on the form.



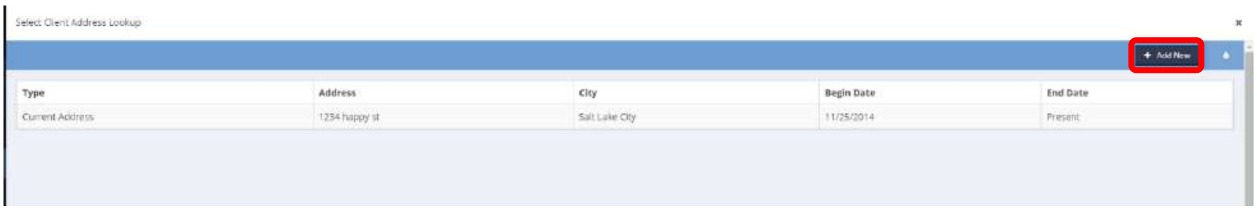
War Zone Name, **Months Served in a War Zone** and **Received Friendly or Hostile Fire** appear only if answering "Yes" to **Served in a War Zone**.

Percent of AMI (SSVF Eligibility) and **Last Permanent Address** appear when the assessment type is entry and the client is the head of household for this enrollment.

The **Theatre of Operations** rows appear based upon the military service dates entered. Only military actions that occurred during the date range appear. Rows for recent military actions do not appear for a veteran whose separation from military service occurred prior to them nor do rows for earlier military actions appear for veterans whose service entry date occurred after them.

Enter, or select from drop-down lists, values for each field presented on the form. If the **Last Permanent Address** field displays, click on the magnifying glass  icon. The Client Address History (Select) Lookup form appears.

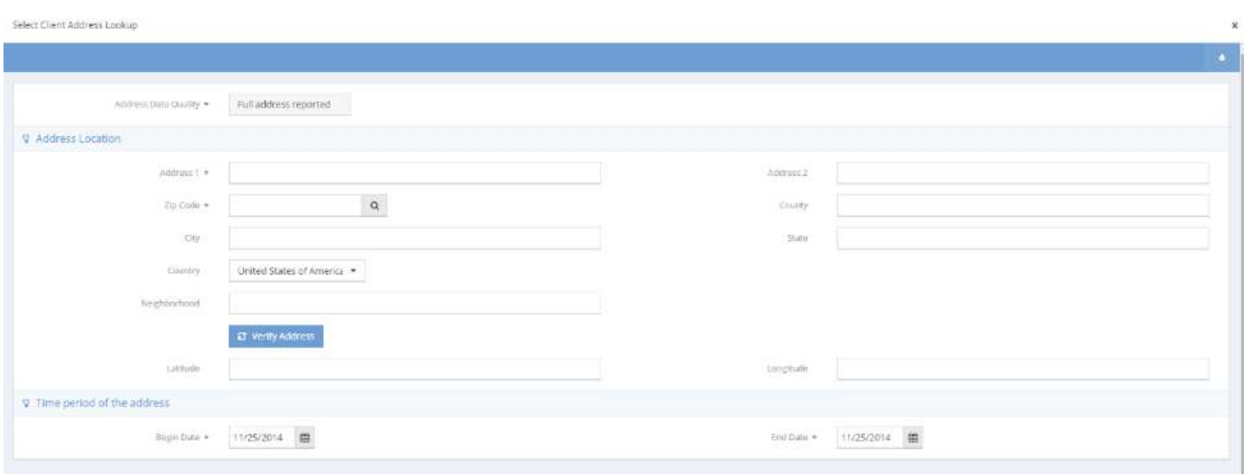
Client Address Veteran (Select)



Select the desired address from the list displayed or click on the 

button to enter a new address. The Veteran Last Permanent Address form displays.

Veteran Last Permanent Address

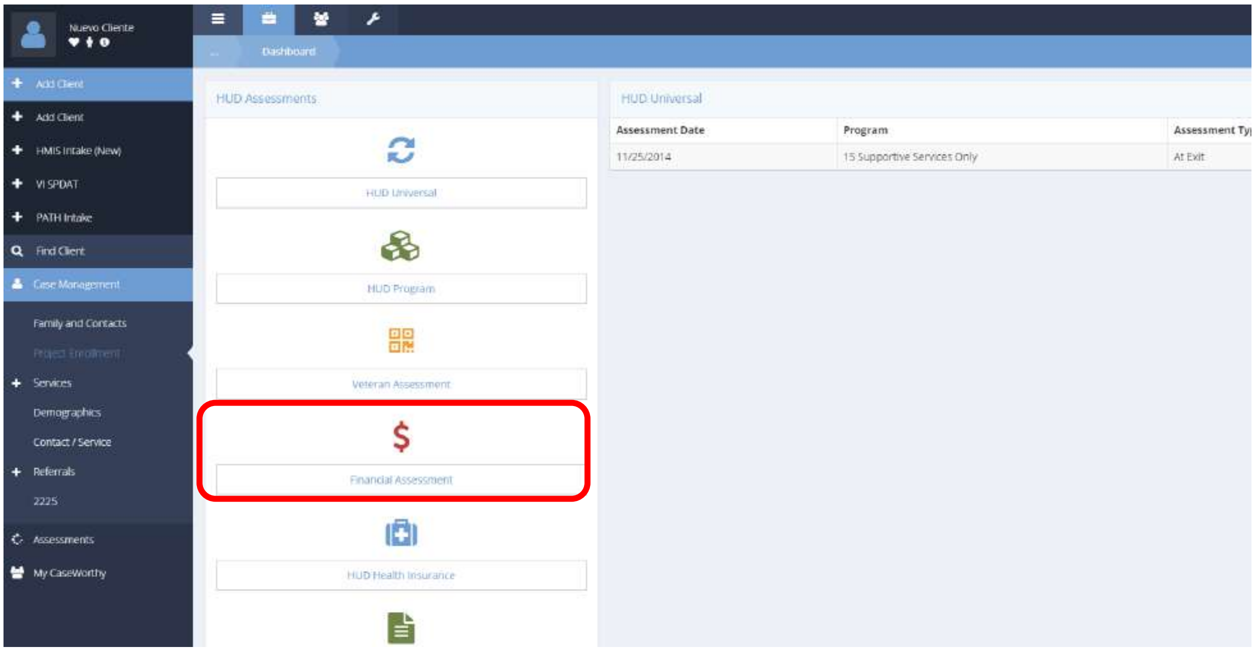


After completing the data entry and verifying the address, click on the 

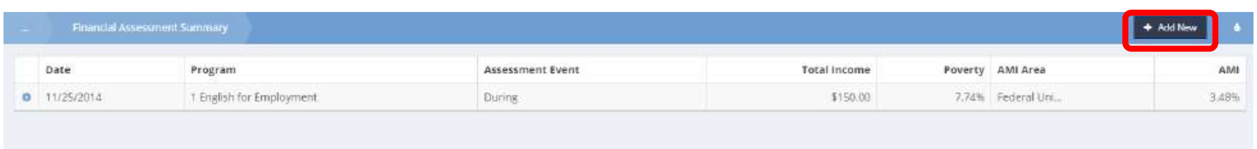
button.

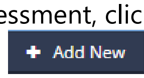
Financial Assessment

Navigation: Case Management>Assessments>HUD Assessments Dashboard>HUD Assessments



Click on the Financial Assessment icon on the HUD Assessments menu. The Financial Assessment Summary form displays a list of existing assessments.

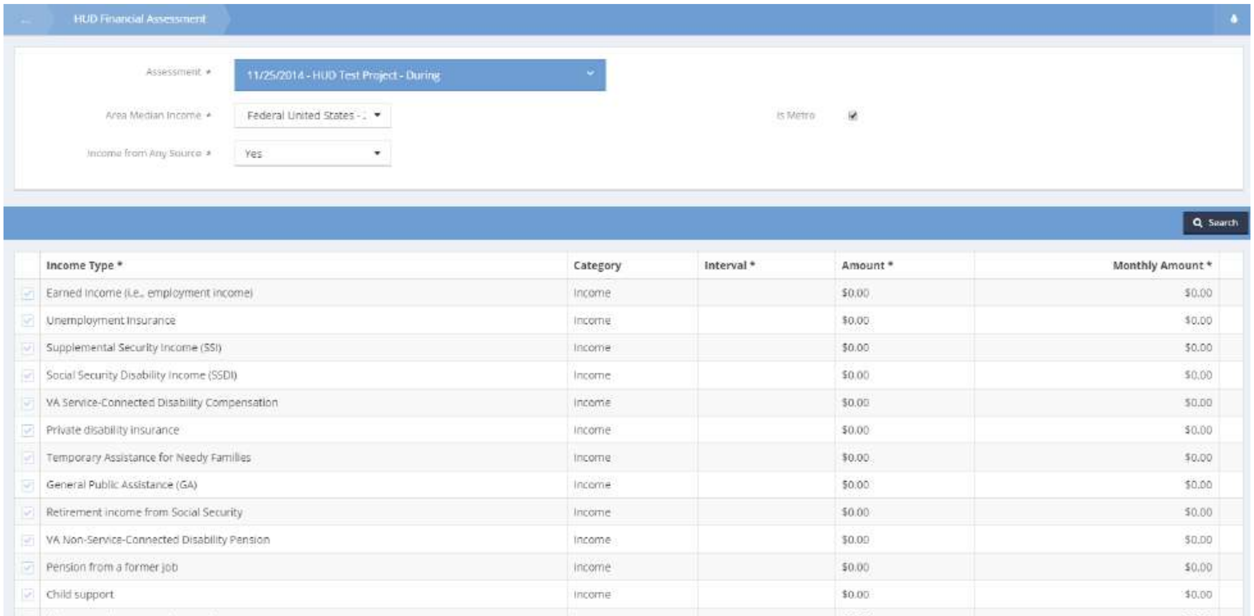


To edit or delete an assessment, click on the action gear  icon associated with it. To begin a new assessment, click on the 

button. The Financial Assessment form displays.

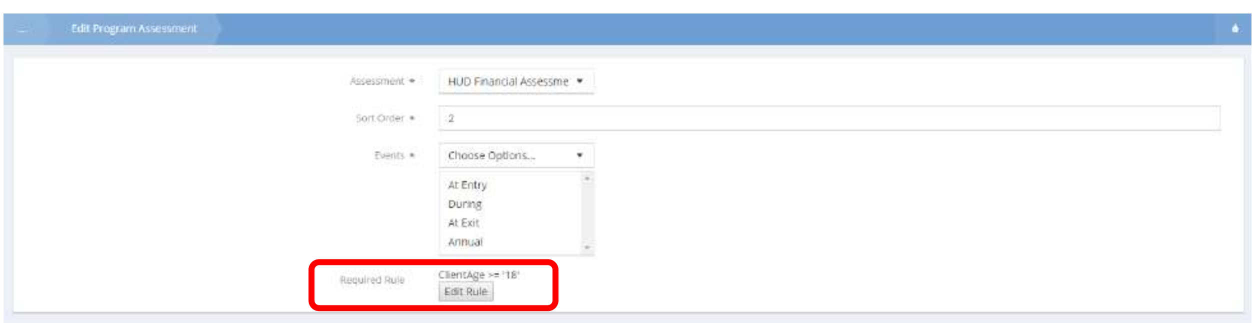
Follow the steps in The Assessment Manager section of this document to create a new assessment or overwrite an existing one.

Once the assessment is established, the Assessment field shrinks and the Financial Assessment form displays.

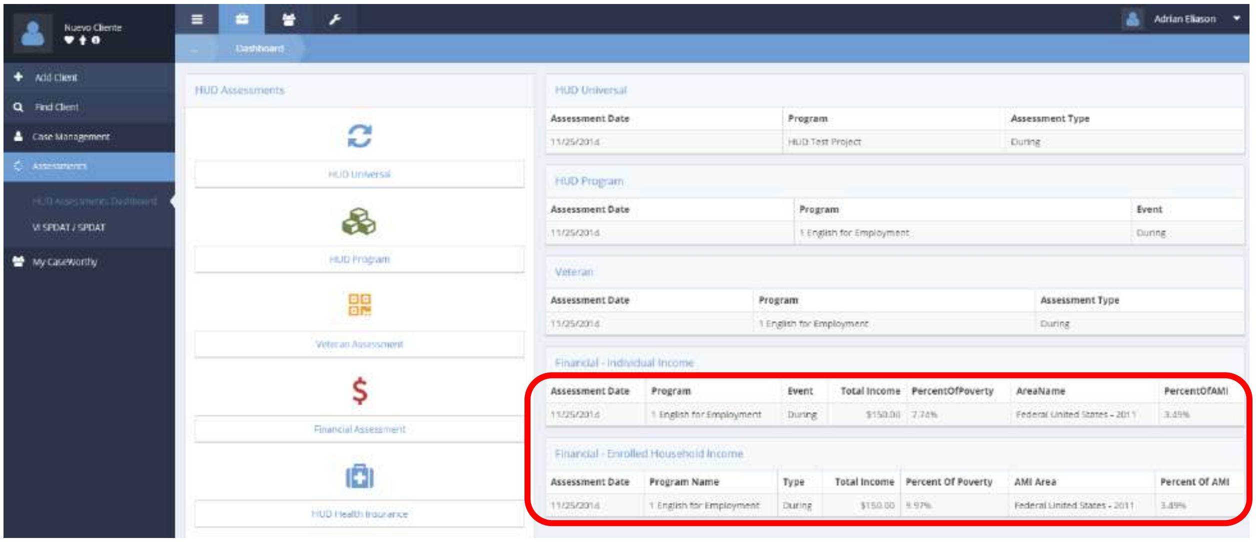


If the client has no source of income, click on the Income from Any Source field, select "No" from the drop-down list that appears and click on the Save button. Otherwise, select the relevant income sources and enter an amount for each. Click on the Save button.

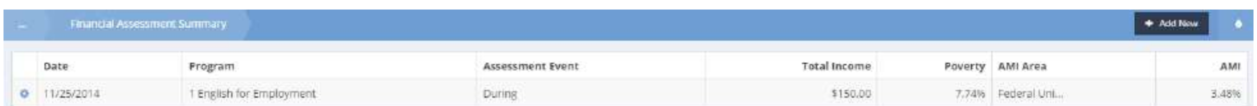
NOTE: ***The Financial Assessment form lacks rules regarding project type and funding source because there is only one data element and therefore one set of requirements for the entire assessment. The CaseWorthy™ system administrator can simply link the assessment to relevant programs and more nuanced rules on the assessment form are unnecessary. Financial assessments are limited by HUD requirements to heads of household and adults. These conditions are set during setup when linking the financial assessment to the program as shown below.***



Individual and Household Enrollment Members Financial Summaries



Click on an entry in the Financial – Individual Income query table. The Financial Assessment Summary form displays a list of the income, poverty total, percent of poverty and percent of AMI for the current client.

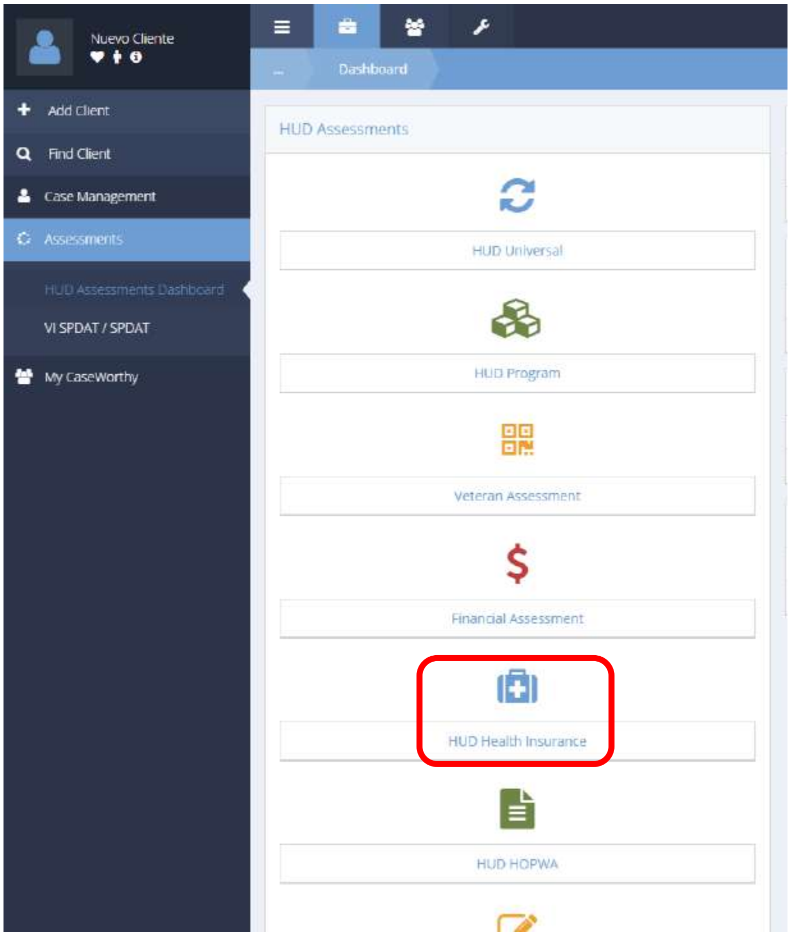


Click on an entry in the Financial – Enrolled Household Income query table. The Enrollment Members Financial Summary form displays a list of total values for the income, poverty total, percent of poverty, and percent of AMI for all family members enrolled in the program.

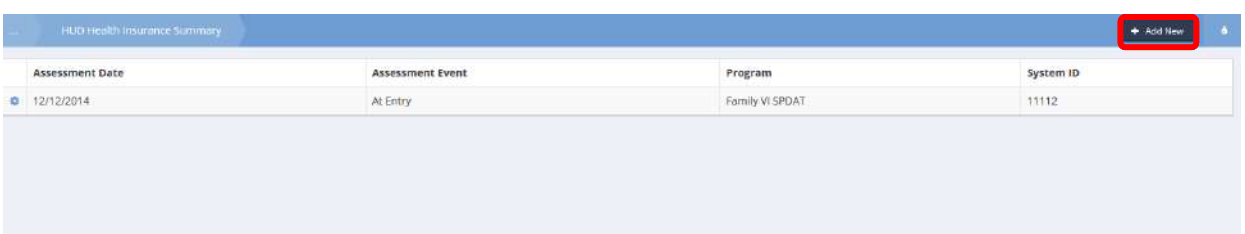
Enrollment Members Financial Summary

HUD Health Insurance Assessment

Objective: Complete a new HUD health insurance assessment for a client.

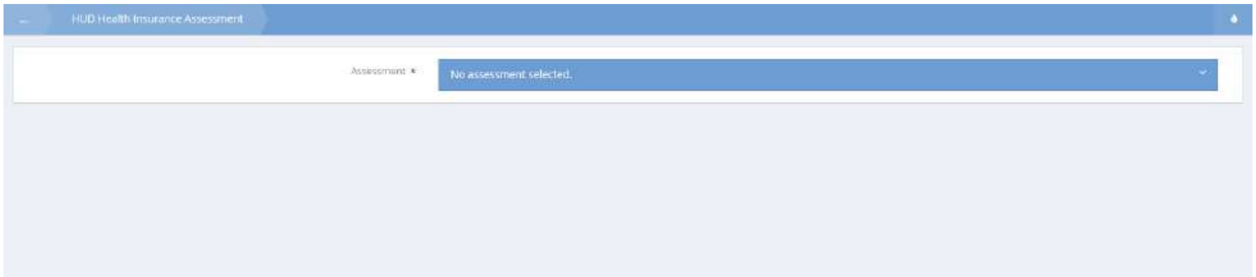


Click the HUD Health Insurance icon. The HUD Health Insurance Summary form displays.

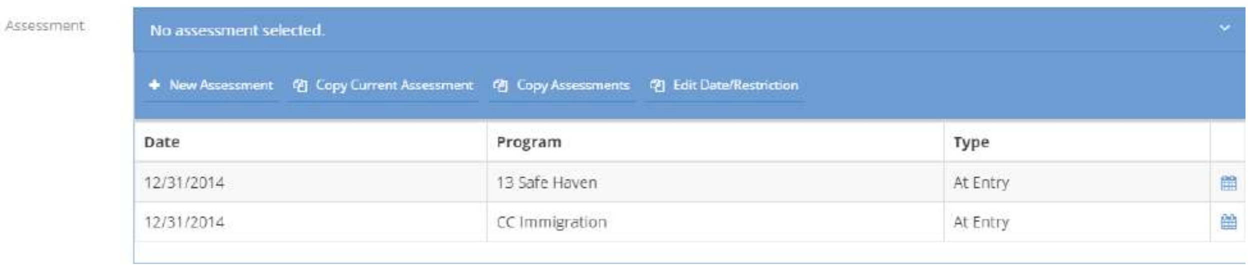


Click [+ Add New] to start a new assessment.

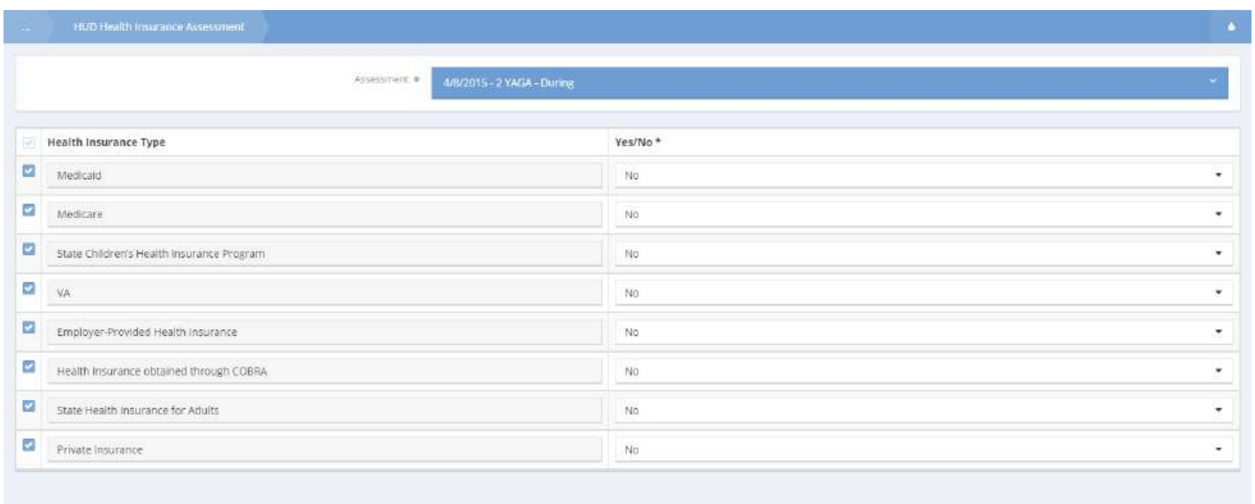
The HUD Health Insurance Assessment form displays.



To select an assessment or begin a new assessment, click on the No assessment selected. area of the Assessment field. The field expands to list existing assessments.



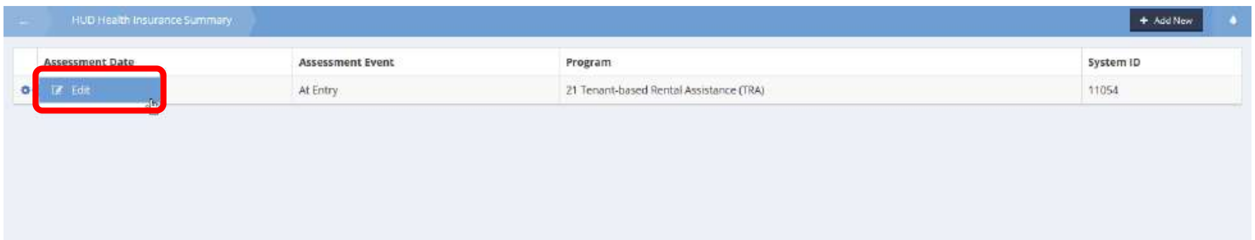
Once the existing assessment is selected or a new assessment is started, the HUD Health Insurance Assessment form displays again.



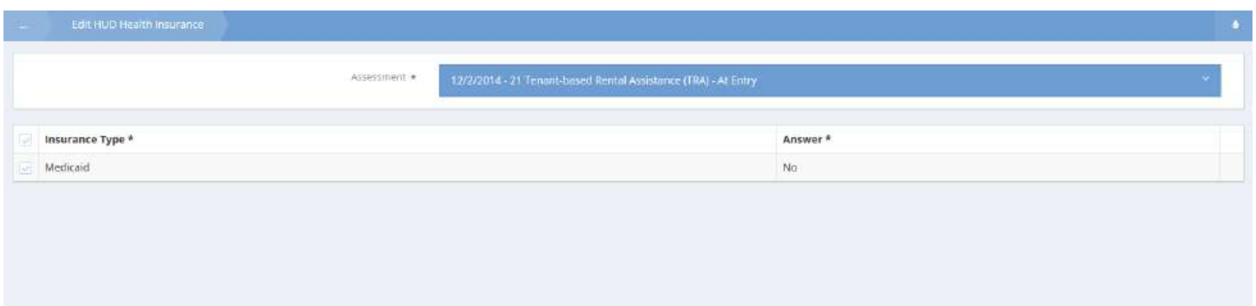
Answer all the assessment questions and click on the Save button when finished.

The HUD Health Insurance Summary form displays.

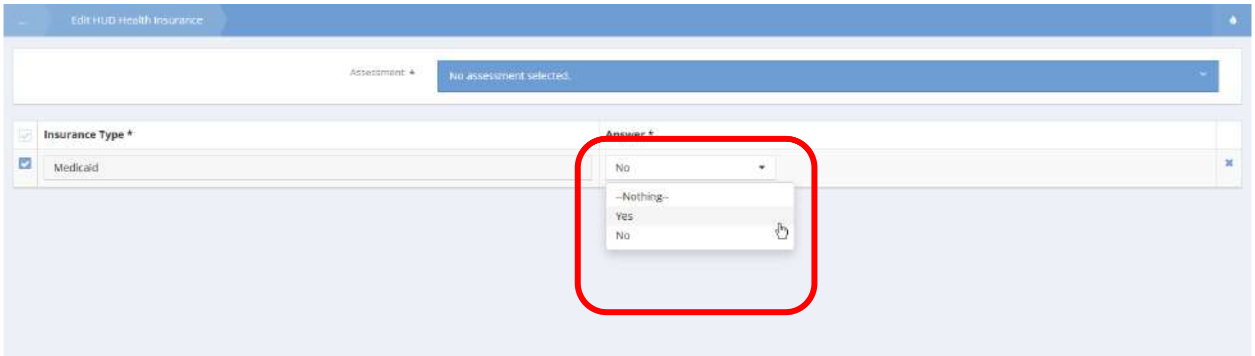
To edit an existing assessment, click the action gear icon associated with it and select Edit from the pop up menu that appears.



The HUD Health Insurance Edit form displays.

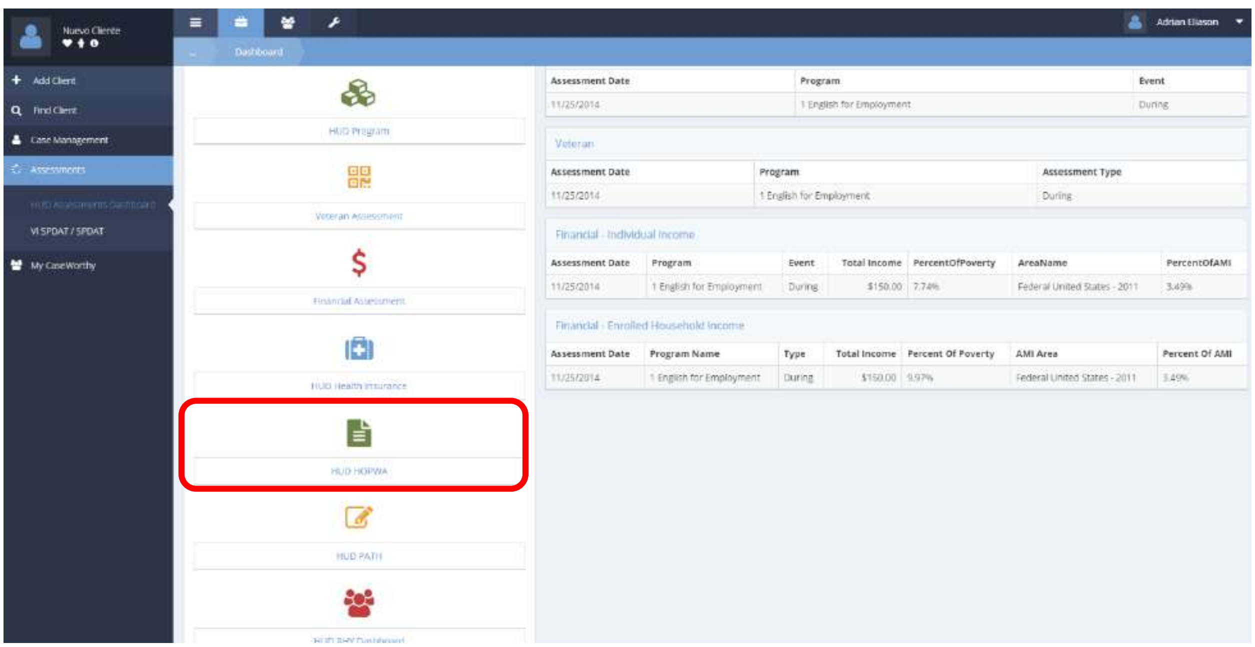


To change the answer for an insurance type, click the clear checkbox and select Yes or No from the drop-down list. Click on the Save button when finished.



HUD HOPWA

Navigation: Case Management>Assessments>HUD Assessments Dashboard>HUD Assessments



Click on the HUD HOPWA icon on the HUD Assessments Menu. The HUD HOPWA Summary form displays a list of existing assessments.

HUD HOPWA Data Summary

To edit or delete an assessment, click on the action gear icon associated with it. To begin a new assessment, click on the Add New button. The HUD HOPWA Data form displays.

HUD HOPWA Data

Follow the steps in [The Assessment Manager] section of this document to create a new assessment or overwrite an existing one.

Once the assessment is established and the Assessment field shrinks, click on the down arrow icon for the "Receiving Public HIV/AIDS Medical Assistance" field and select a value from the drop-down list that appears.

Note: ***If "No" is selected, a new field, 'If No to "Receiving Public HIV/AIDS Medical Assistance" Reason', displays.***

Click on the down arrow icon and select a value from the drop-down list that appears.

Click on the down arrow icon for the "Receiving AIDS Drug Assistance Program (ADAP) field and select a value from the drop-down list that appears.

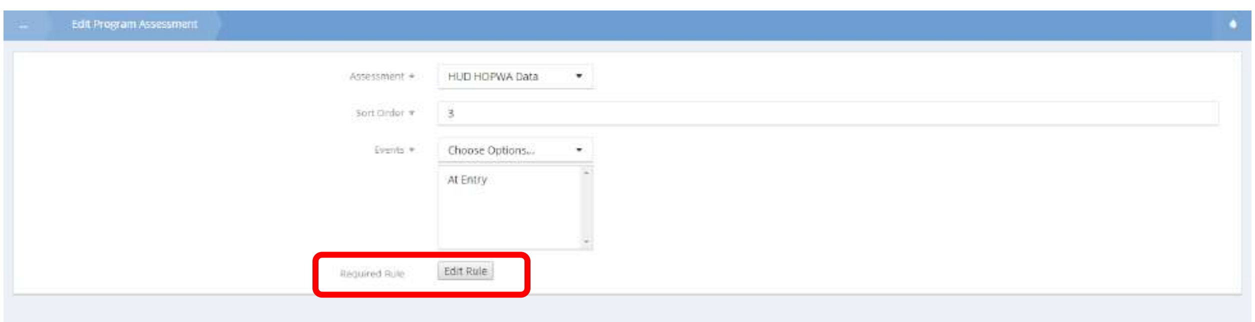
Note: ***If "No" is selected, a new field, 'If No to "Receiving AIDS Drug Assistance Program (ADAP) Reason', displays.***

Click on the down arrow ▼ icon and select a value from the drop-down list that appears.

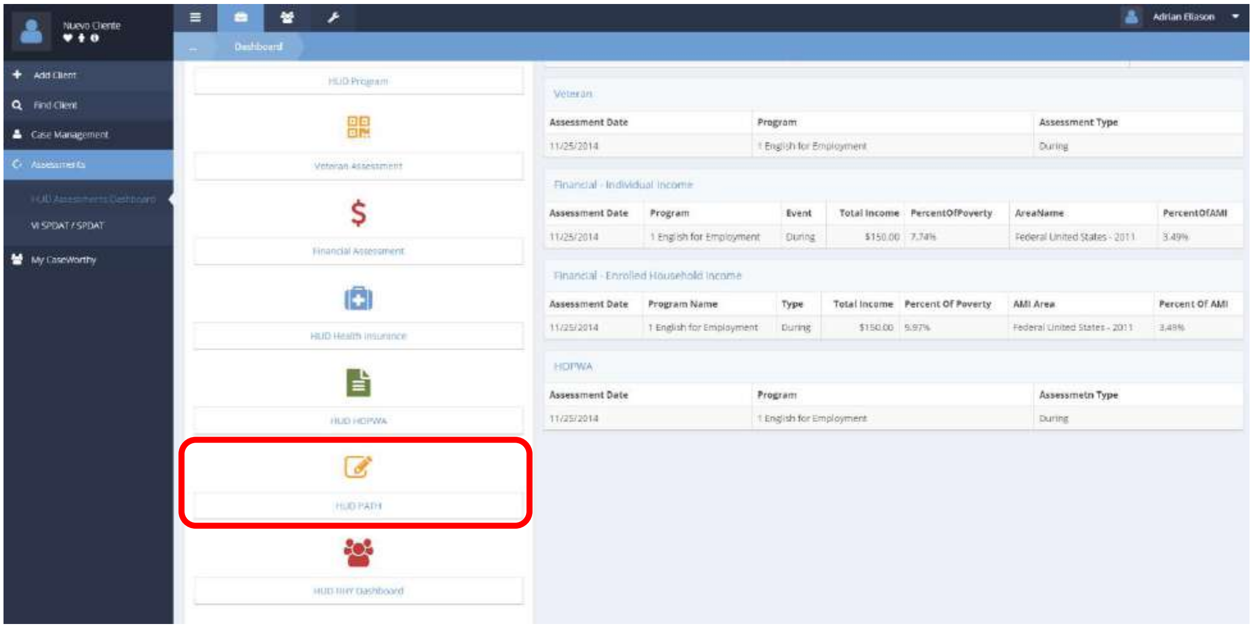
When finished, click on the Save button.

NOTE: ***The HOPWA Assessment lacks rules regarding project type and funding source because each data element in the assessment has the same or very similar requirements. The CaseWorthy™ system administrator can simply link the assessment to relevant programs and more nuanced rules on the assessment form are unnecessary.***

This assessment should be linked to a program in a sort order that insures the HUD Program Assessment precedes it in a workflow. This allows a required rule when linking the assessment to draw from the HUD Program's data regarding HIV Status. The system admin can insure this assessment only appears in the workflow for household members with HIV/AIDS as shown in the following image.

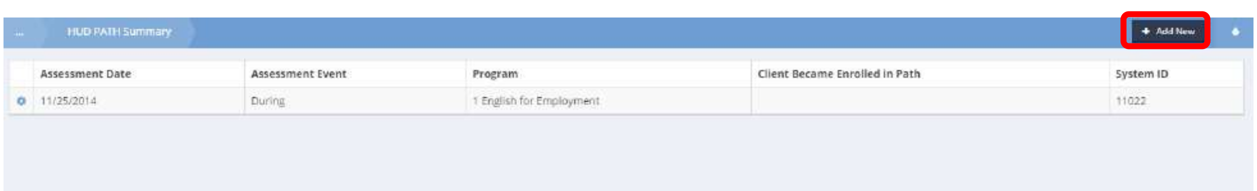


HUD PATH



Click on the HUD PATH icon on the HUD Assessments Menu. The HUD PATH Assessments form displays existing assessments by date

HUD PATH Data Assessments



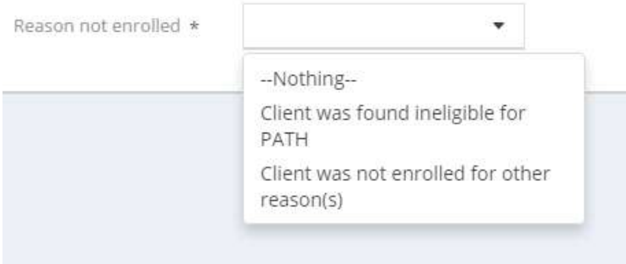
To edit or delete an entry, click on the action gear icon associated with it. To add a new HUD PATH Assessment, click on the Add New button. The HUD PATH Data form displays.

HUD PATH Data

Follow the steps in The Assessment Manager section of this document to create a new assessment or overwrite an existing one.

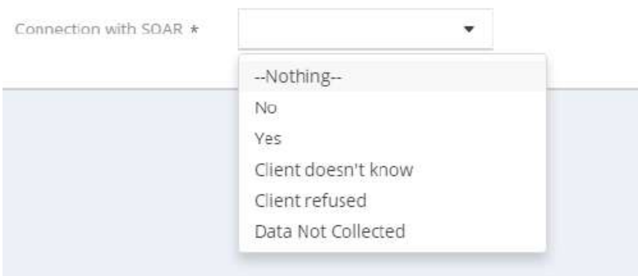
Once the assessment is established and the Assessment field shrinks, click on the down arrow icon for the "Client became enrolled in PATH" field and select a value from the drop-down list that appears.

Note: ***If "No" is selected, a new field, "Reason not enrolled", displays.***



Click on the down arrow icon and select a value from the drop-down list that appears.

Note: ***If client is head of household for this enrollment and assessment type is "at exit", an additional field, "Connection with SOAR" displays.***



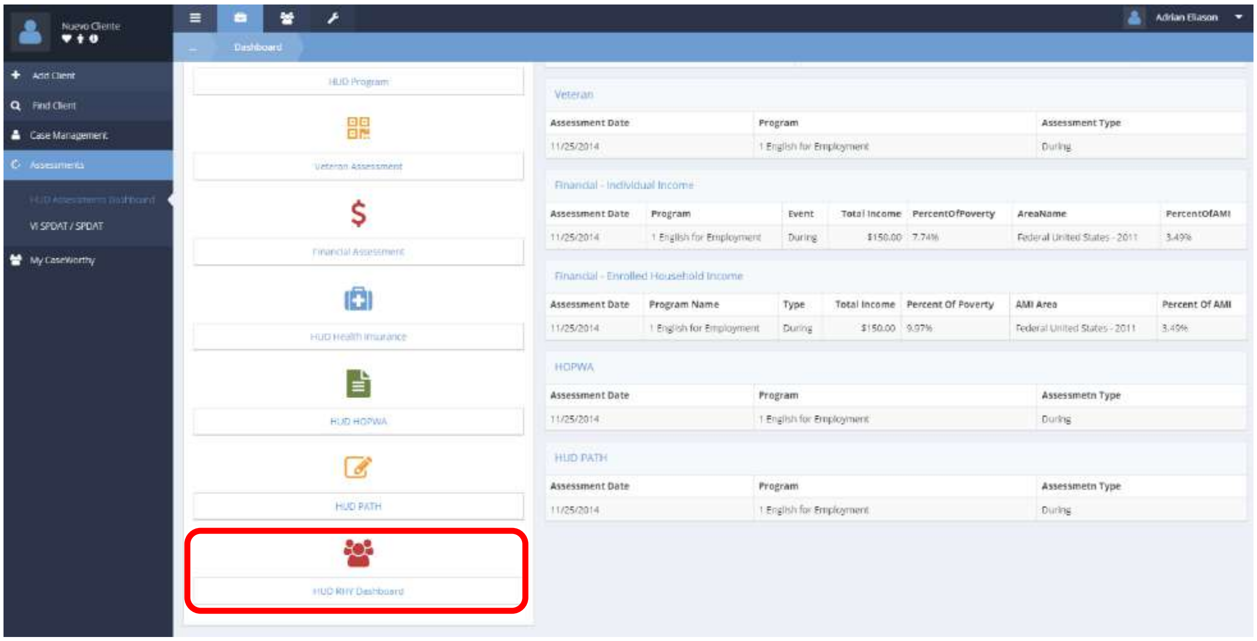
Click on the down arrow icon and select a value from the drop-down list that appears.

When finished, click on the Save button.

NOTE: ***The PATH Assessment lacks rules regarding project type and funding source because each data element in each assessment has the same or very similar requirements. The CaseWorthy™ system administrator can simply link the assessment to relevant programs and more nuanced rules on the assessment form are unnecessary.***

HUD RHY

Navigation: Case Management>Assessments>HUD Assessments Dashboard>HUD Assessments



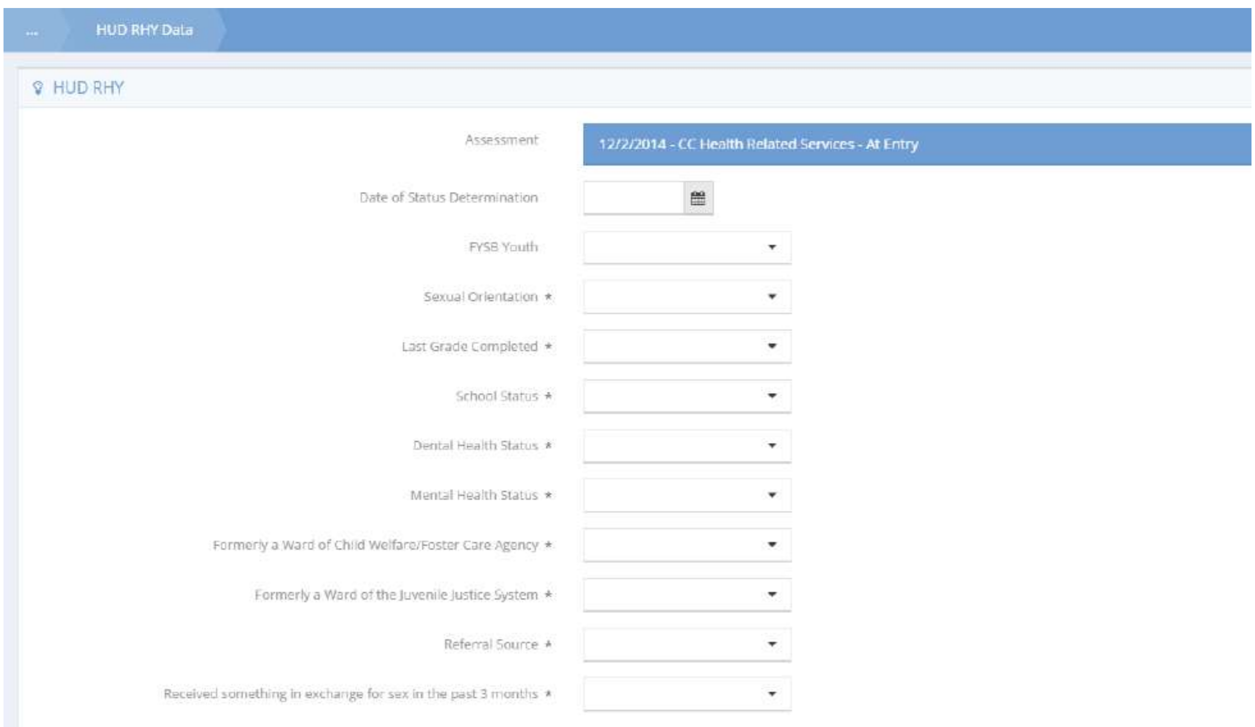
Click on the HUD RHY Dashboard icon on the HUD Assessments Menu. The RHY Assessments Dashboard displays.

RHY Main Assessment

Click on the RHY Main Assessment icon on the RHY Assessments Dashboard. The HUD RHY Data Summary form displays a list of existing assessments.

To edit or delete an entry, click on the action gear icon associated with it. To begin a new assessment, click on the + Add New button. The HUD RHY Data form displays.

Follow the steps in The Assessment Manager section of this document to create a new assessment or overwrite an existing one.

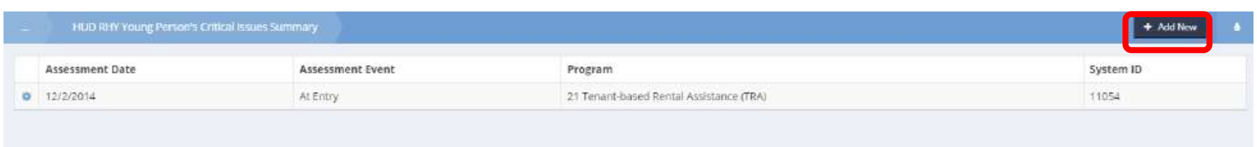


Enter the Date of Status Determination. For the most part, the remainder of the fields on the form have drop-down lists associated with them. Click on the down arrow icon for each to see the drop-down list. Indicate whether the client is a Family and Youth Services Bureau youth. If "No", an additional field appears. Indicate the reason the client doesn't qualify for FYSB. Enter the sexual orientation, last grade completed, school status, dental health status and mental health status. If answering "Yes" for "Formerly a Ward of Child Welfare/Foster Care Agency" or "Formerly a Ward of the Juvenile Justice System", new fields display requesting the number of years the client was a ward. If answering "Less than one year" to either of those fields, new fields display requesting the number of months. Select a referral source and indicate the client response for “Received something in exchange for sex in the past 3 months”. If “Yes”, two new fields request the number of times and if the client was asked or forced to engage in that activity. Click on the Save button.

HUD RHY Critical Issues

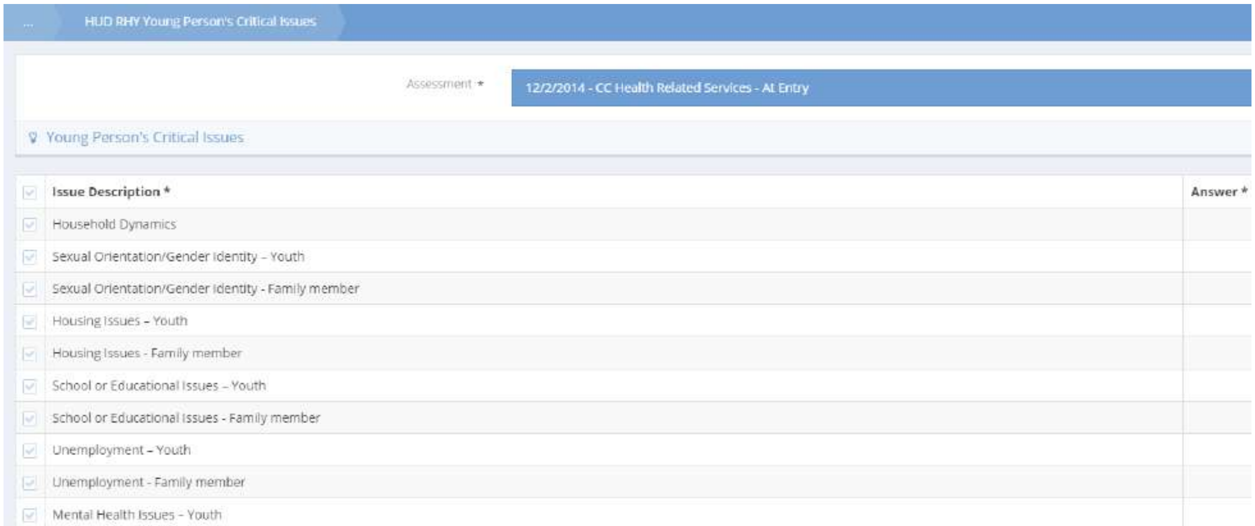
From the RHY Assessments dashboard, click on the RHY Critical Issues icon.

The HUD RHY Young Person's Critical Issues Summary form displays a list of existing assessments.



To edit or delete an entry, click on the action gear icon associated with it. To begin a new assessment, click on the Add New button. The HUD RHY Young Person's Critical Issues form displays.

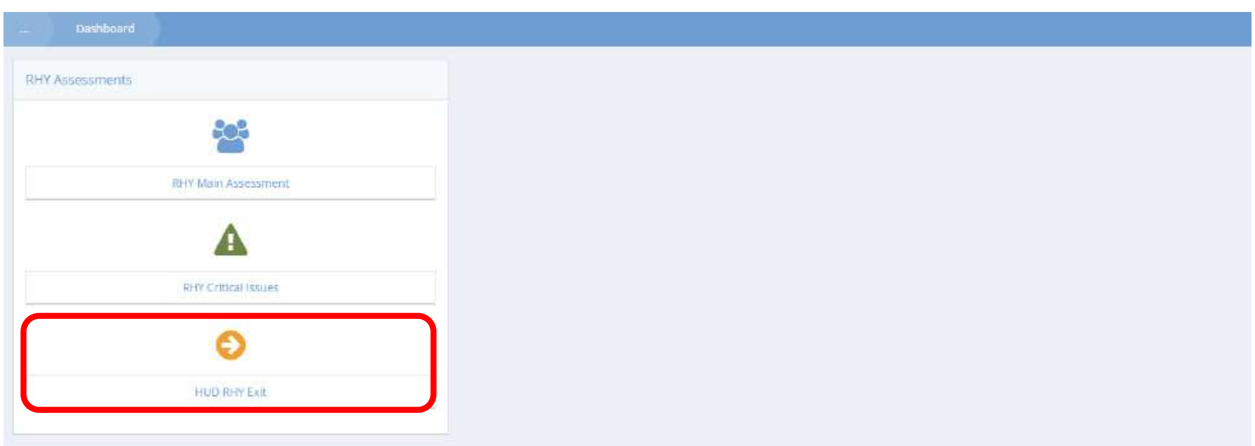
Follow the steps in The Assessment Manager section of this document to create a new assessment or overwrite an existing one.



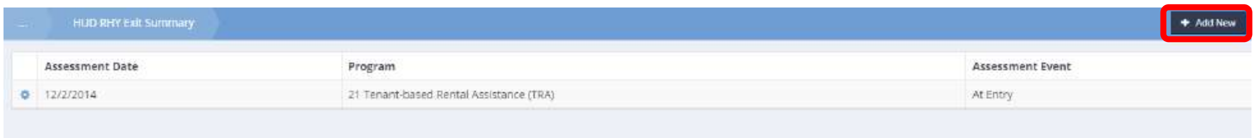
Click on the checkbox for each issue. The answer defaults to “No”. Click on the down arrow icon for each issue to which the client answers in the affirmative and select “Yes” from the drop-down list that appears. After completing the form, click on the Save button.

From the RHY Assessments dashboard, click on the HUD RHY Exit icon.

HUD RHY Exit

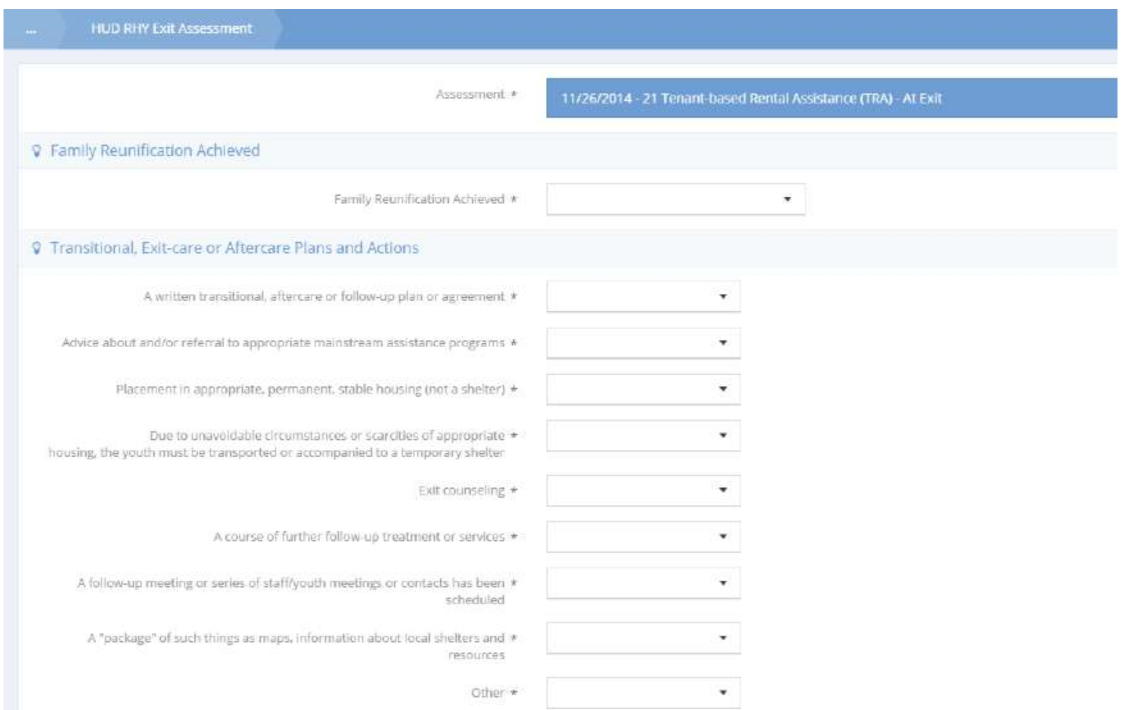


From the RHY Assessments dashboard, click on the HUD RHY Exit icon. The HUD RHY Exit Summary form displays a list of existing exit assessments.



To edit or delete an entry, click on the action gear icon associated with it. To begin a new assessment, click on the Add New button. The HUD RHY Exit (Input) form displays.

Follow the steps in The Assessment Manager section of this document to create a new assessment or overwrite an existing one.



For each field on the form, click on the down arrow icon and select an answer from the drop-down list that displays. After completing the form, click on the Save button.

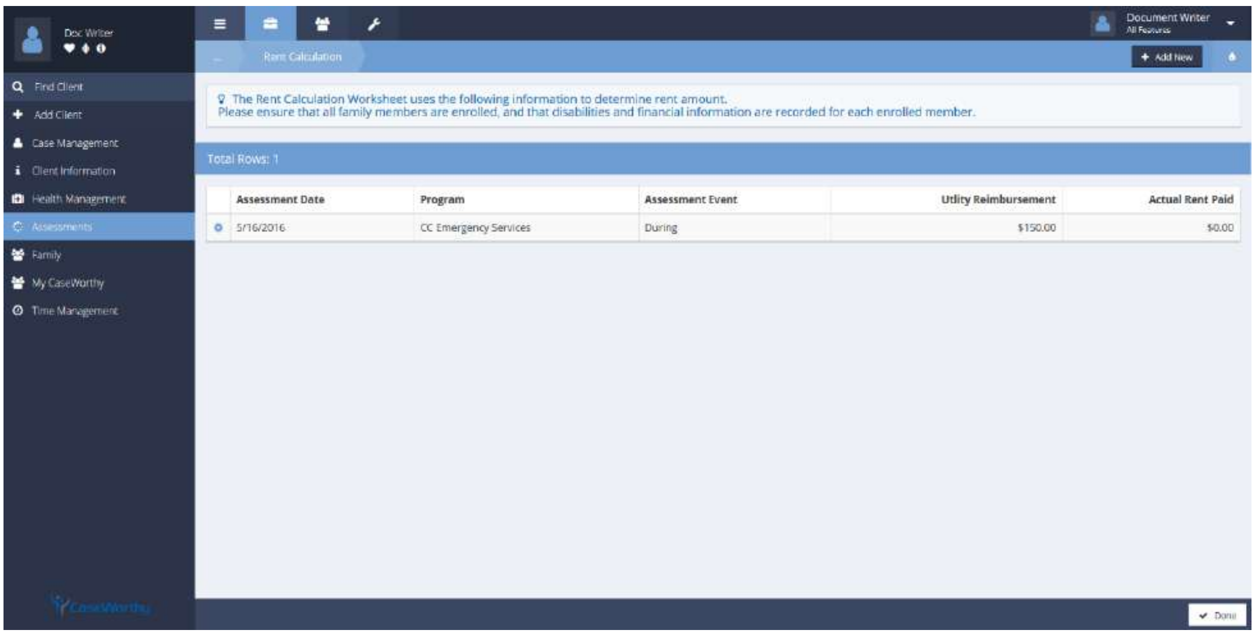
Rent Calculation 2015

Rent Calculation

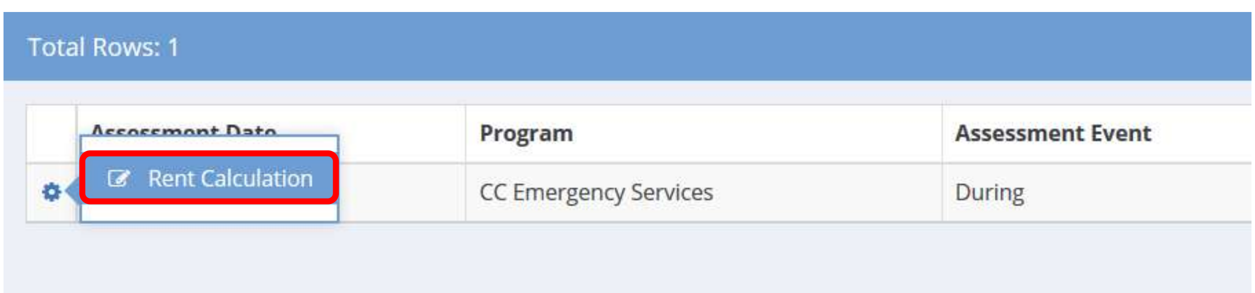
Objective: Edit or add a client rent calculation.

Navigation: Case Management>Assessments>Rent Calculation 2015

The Rent Calculation form displays.

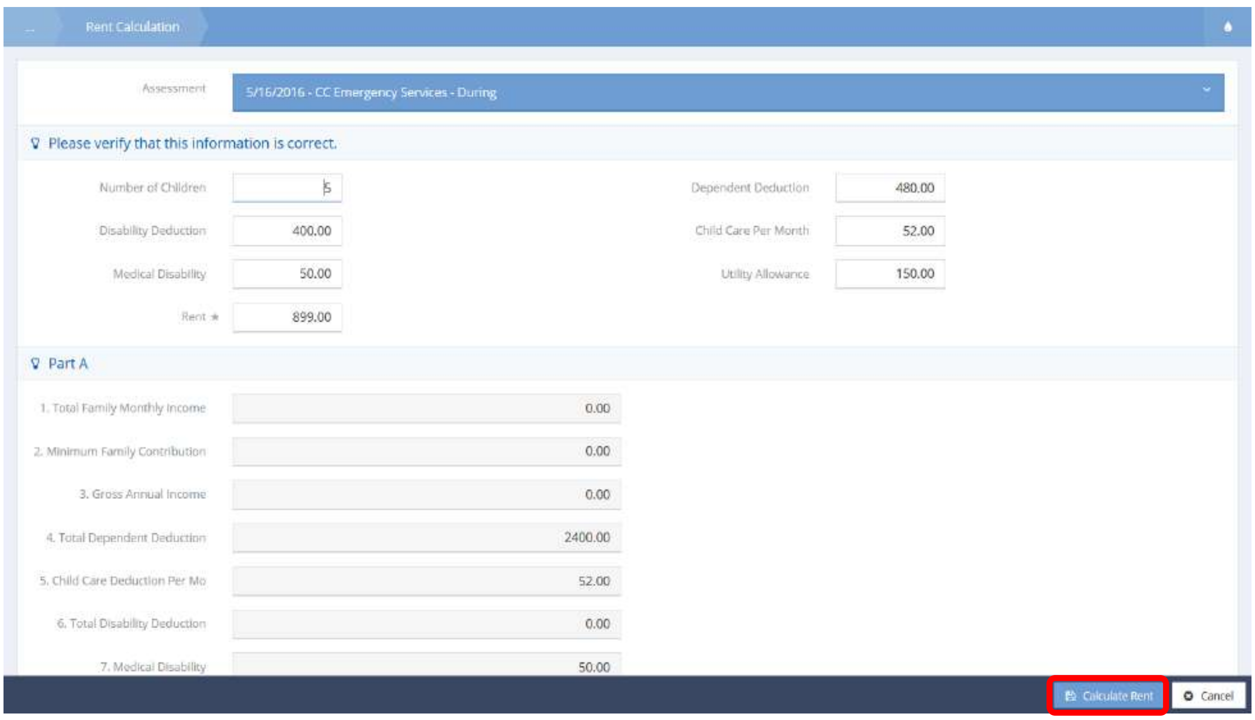


To edit a calculation, click on the action gear icon and select Rent Calculation from the menu options.



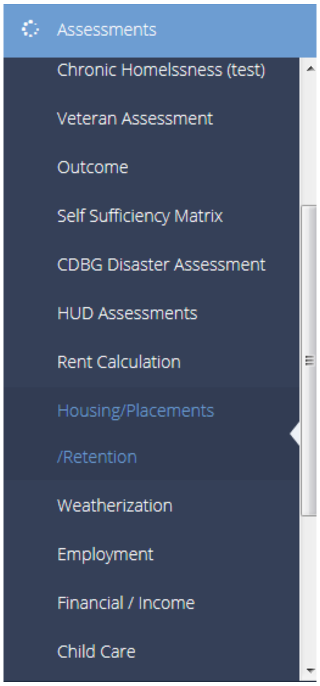
To add a new rent calculation, click the + Add New button.

The Rent Calculation form displays.

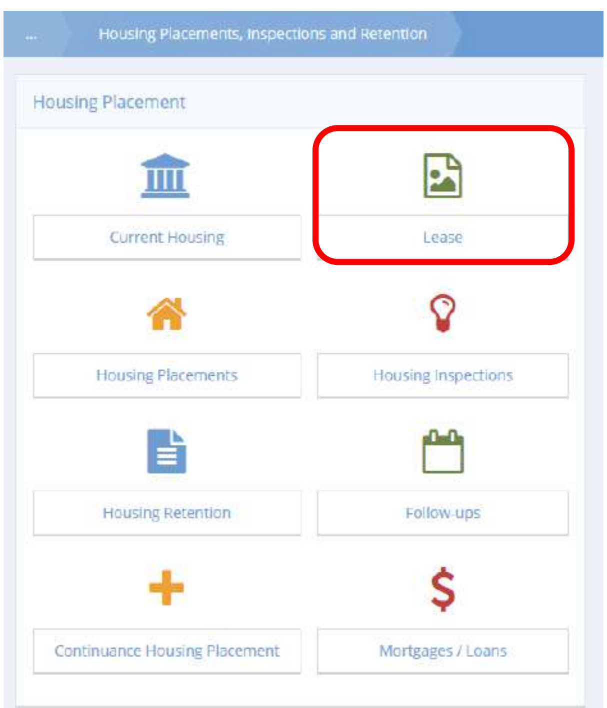


Choosing the edit option auto populates the form with existing data. Enter information into or make changes to required fields: Assessment and Rent. Fill remaining fields as desired. Click the Calculate Rent button to calculate. Fields automatically populate with calculated results. When finished click the Cancel button.

Housing, Placements and Retention

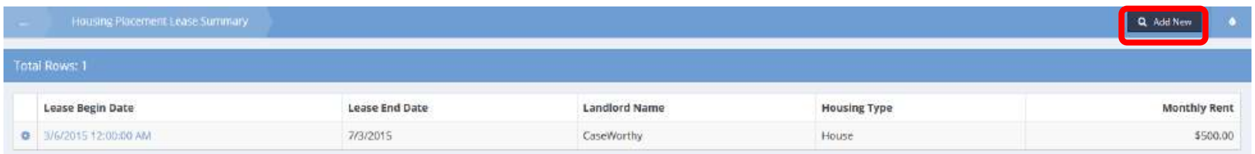


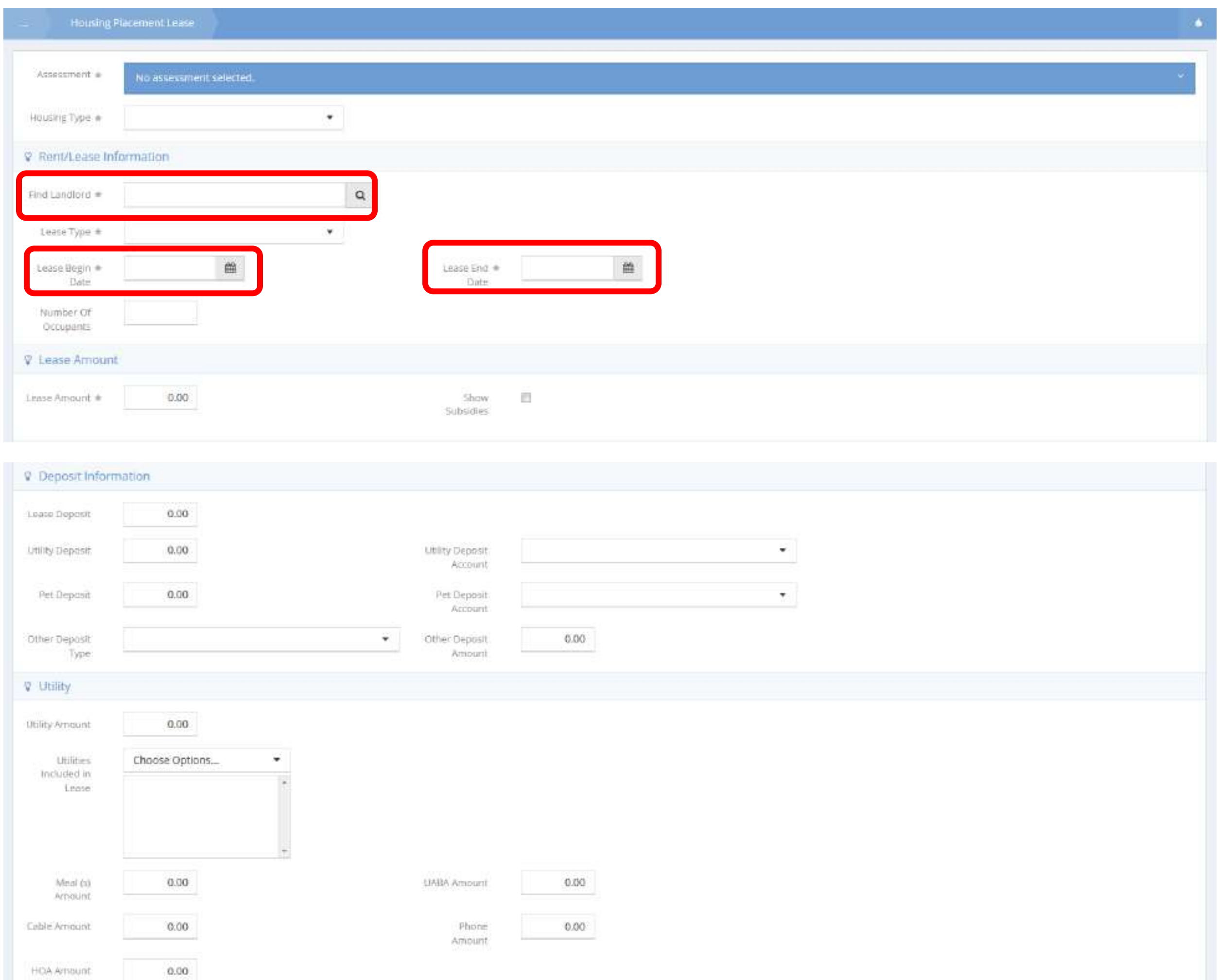
The next menu item in the Assessments menu group is the "Housing Placement & Retention" dashboard. This area allows the user to track and record everything related to a client's housing.

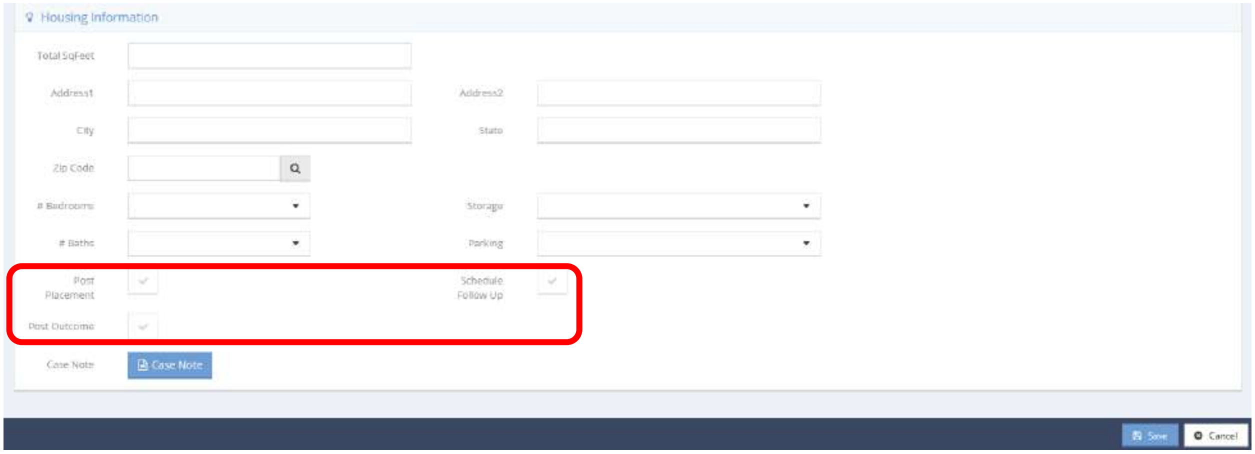


Lease

Clicking the "Lease" icon opens the Housing Lease Summary form. After selecting a landlord, several the fields on the lease auto populate. Enter the lease begin and end dates. For more information on the posting controls at the bottom of the lease, contact an account representative.

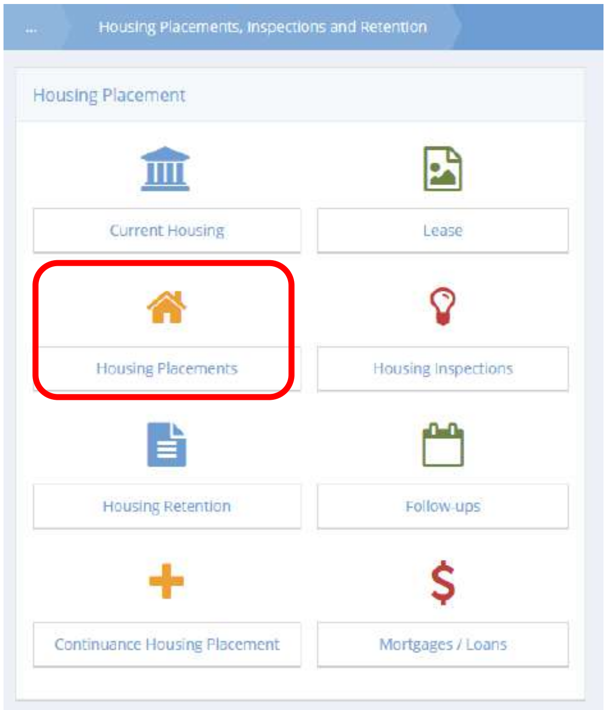




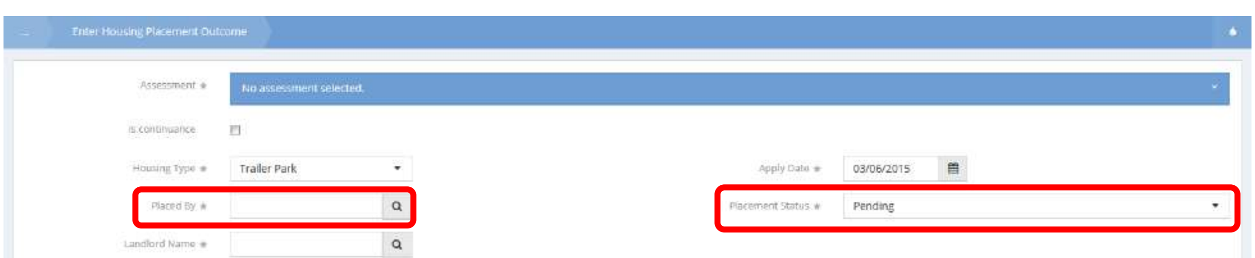


Access payment terms or print the lease from the Housing Lease Summary form.

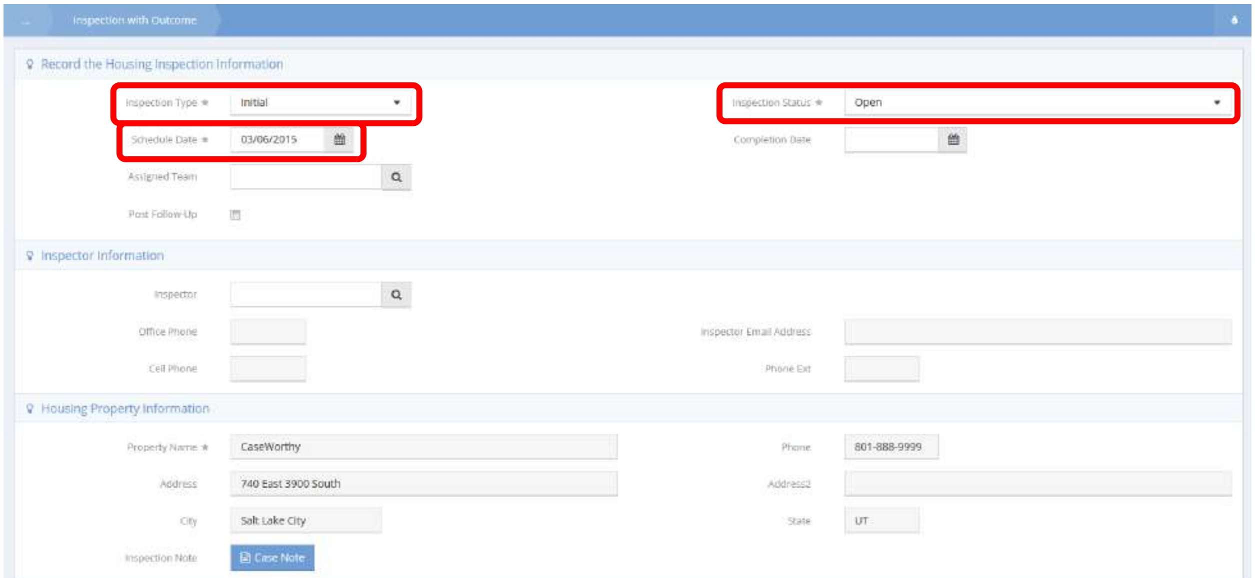
Housing Placements



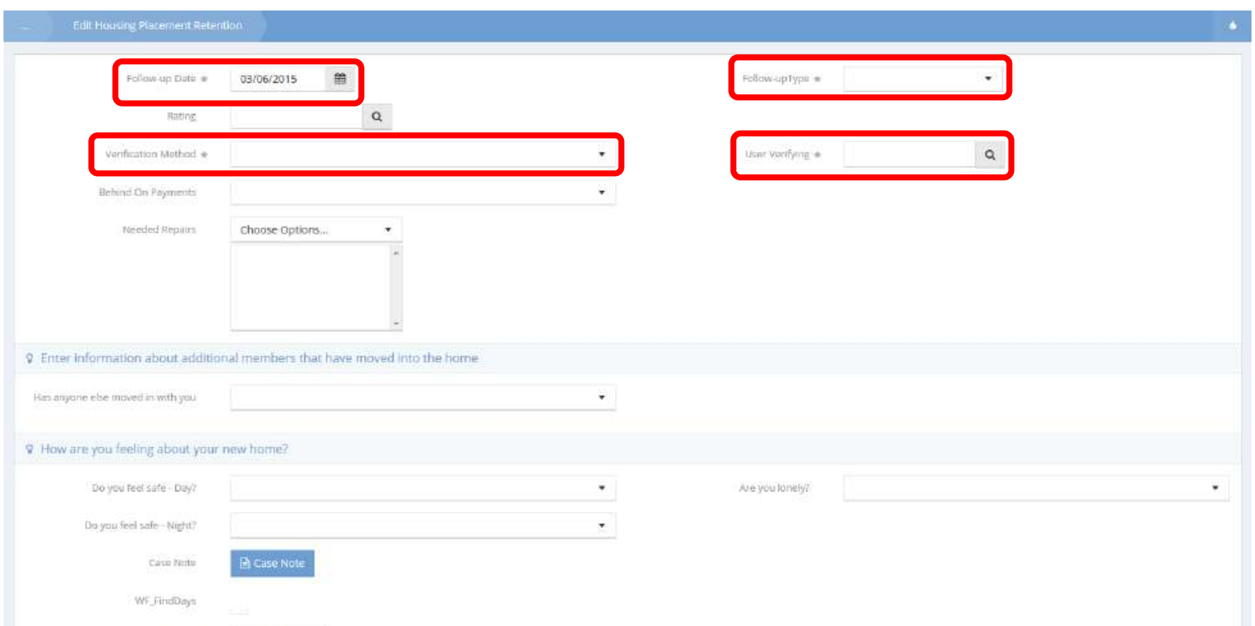
Clicking the "Housing Placement" icon opens the housing placement summary screen. The housing placement input forms are very similar to the lease form, with the addition of the "Placed By" and "Placement Status" fields. From the action gear on the summary form, access inspections, retentions and follow-ups.



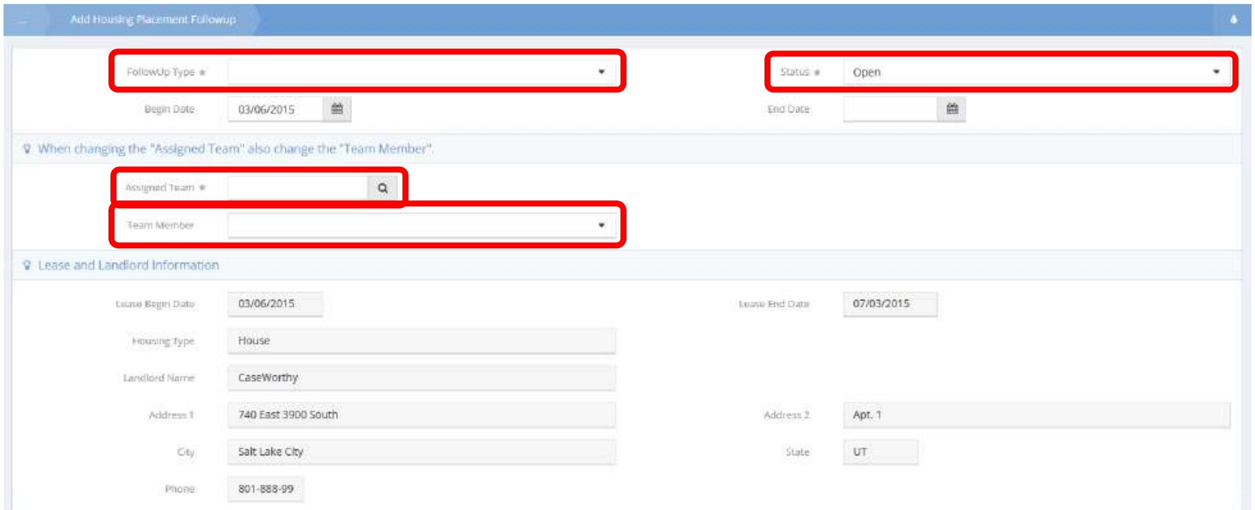
Inspection: Select the inspection type, scheduled date and inspection status.



Retention: Enter the follow-up date and type. Select the verifying user and the method by which they verified.

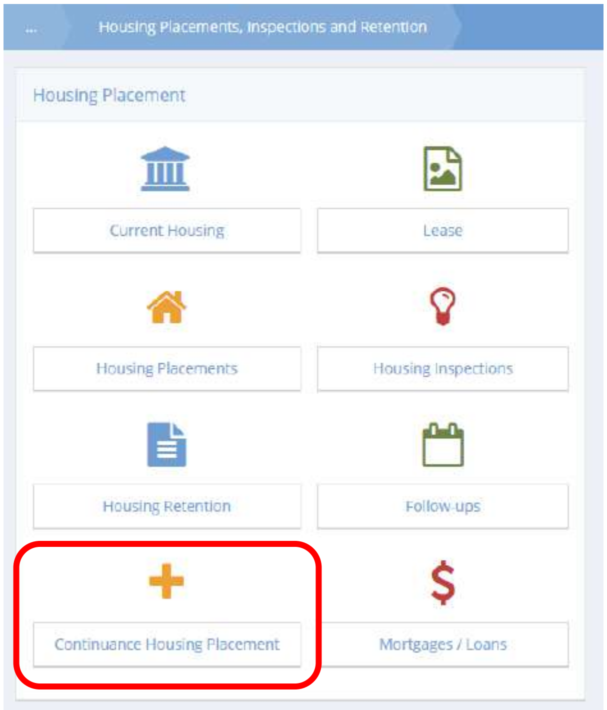


Follow-Up: Select a follow-up type and status, then assign the follow up to a team and a team member if necessary.



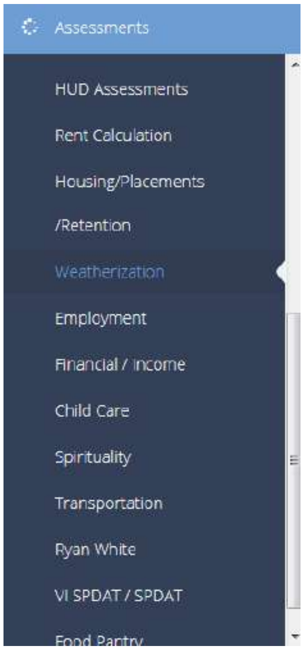
Click on the "Housing Inspection" icon, the "Housing Retention" icon or the "Follow-Ups" icon to access each respective summary form. As shown above, add a new inspection, retention or follow-up from the action gear on the housing placement summary form.

Continuance Housing Placement



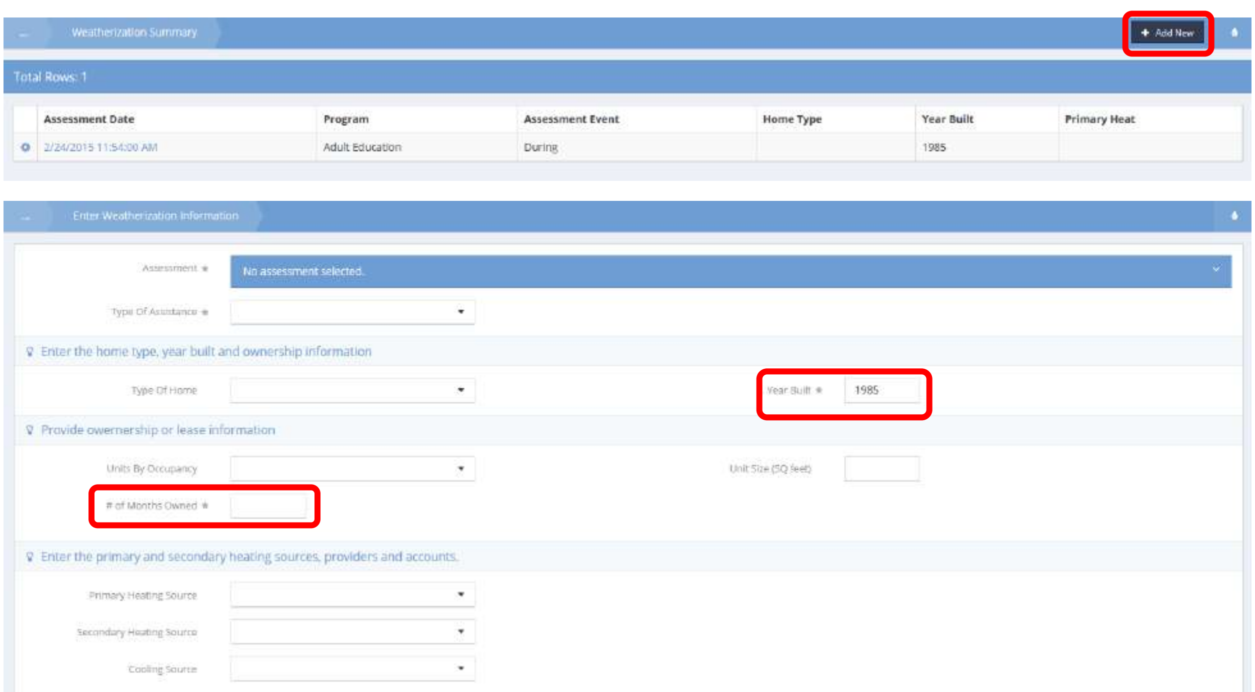
Clicking the "Continuance Housing Placement" icon opens the continuance housing placement form. This form functions the same as the housing placement form, but allows the user to continue a different placement for retention purposes.

Weatherization



The next menu item in the Assessments menu group is the "Weatherization" summary form.

This form allows a user to track specific details about a client's home. Enter the year built and number of months owned. Then enter any other housing details as necessary.



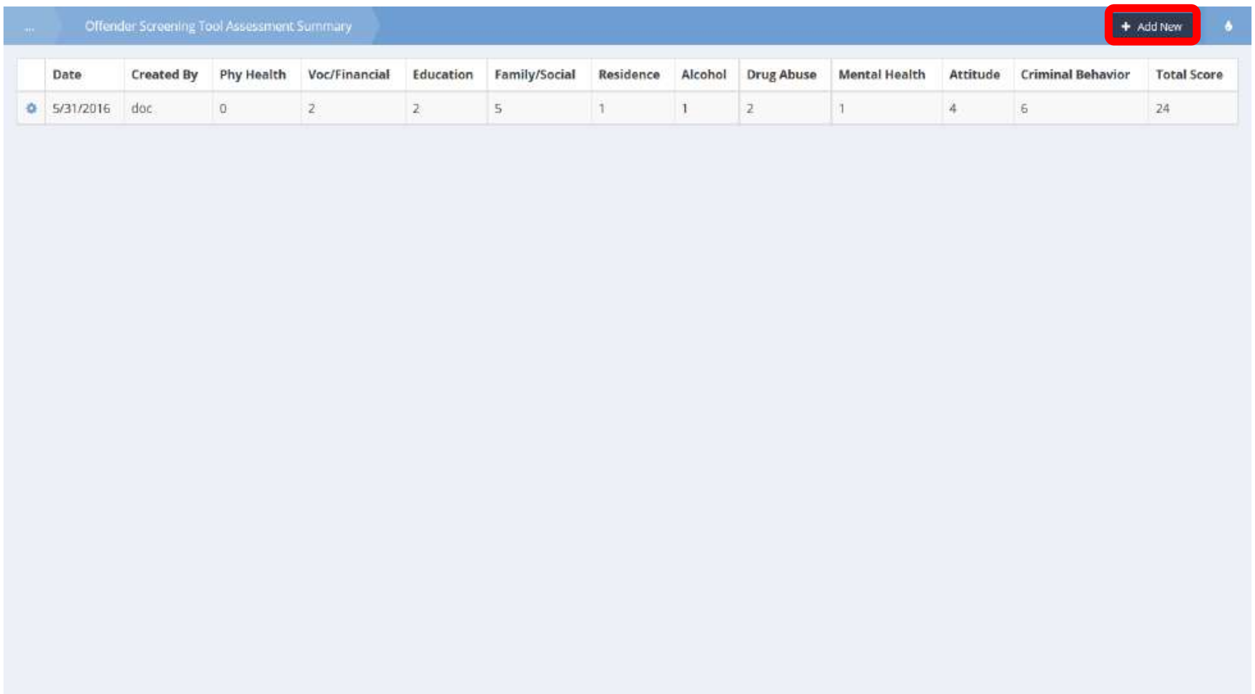
MOST/OST Screening Tool

Offender Screening Tools

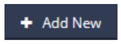
Objective: View and add offender assessments.

Navigation: Case Management>Assessments>MOST/OST Screening Tool

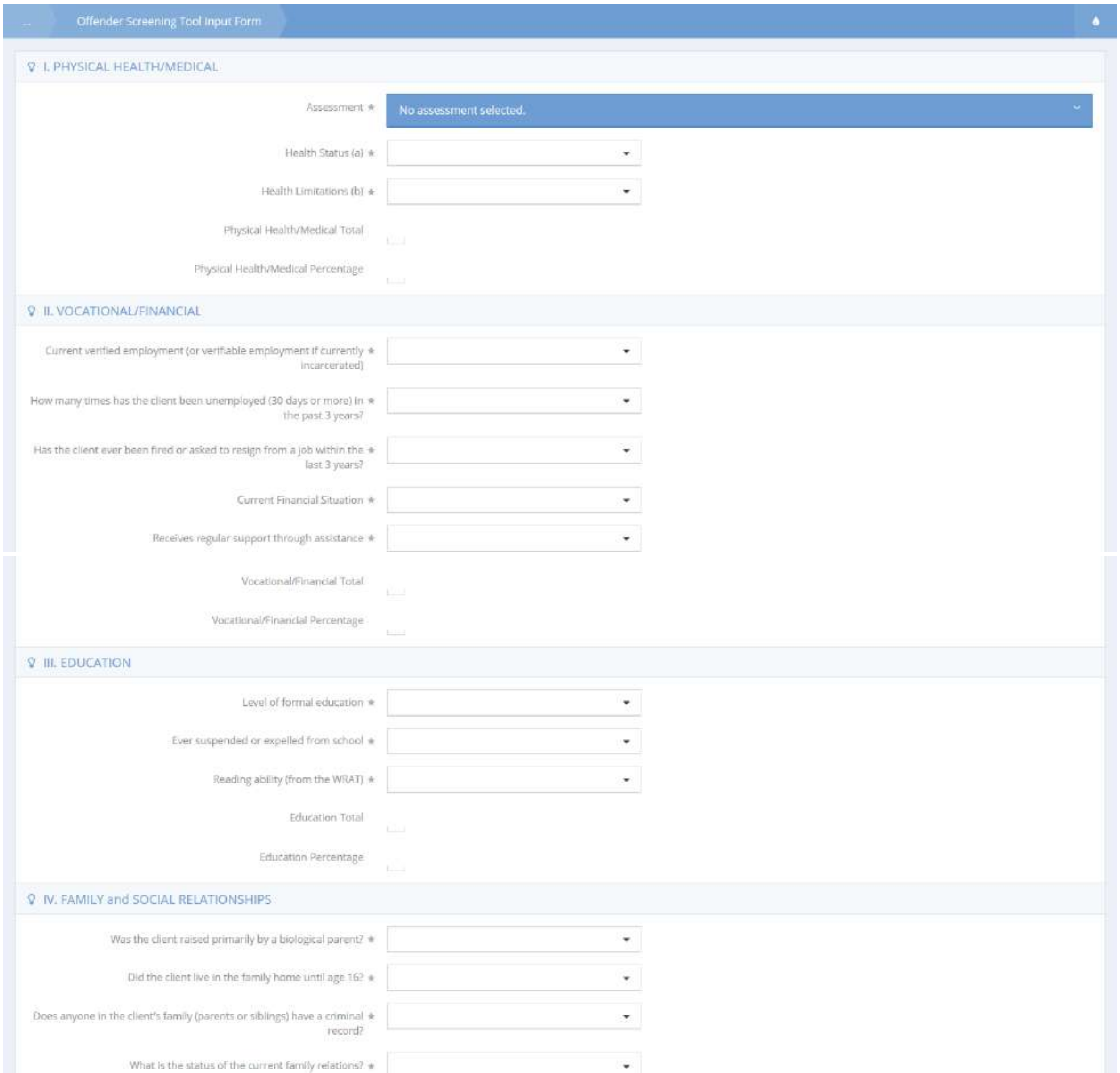
The Offender Screening Tool Assessment Summary form displays.

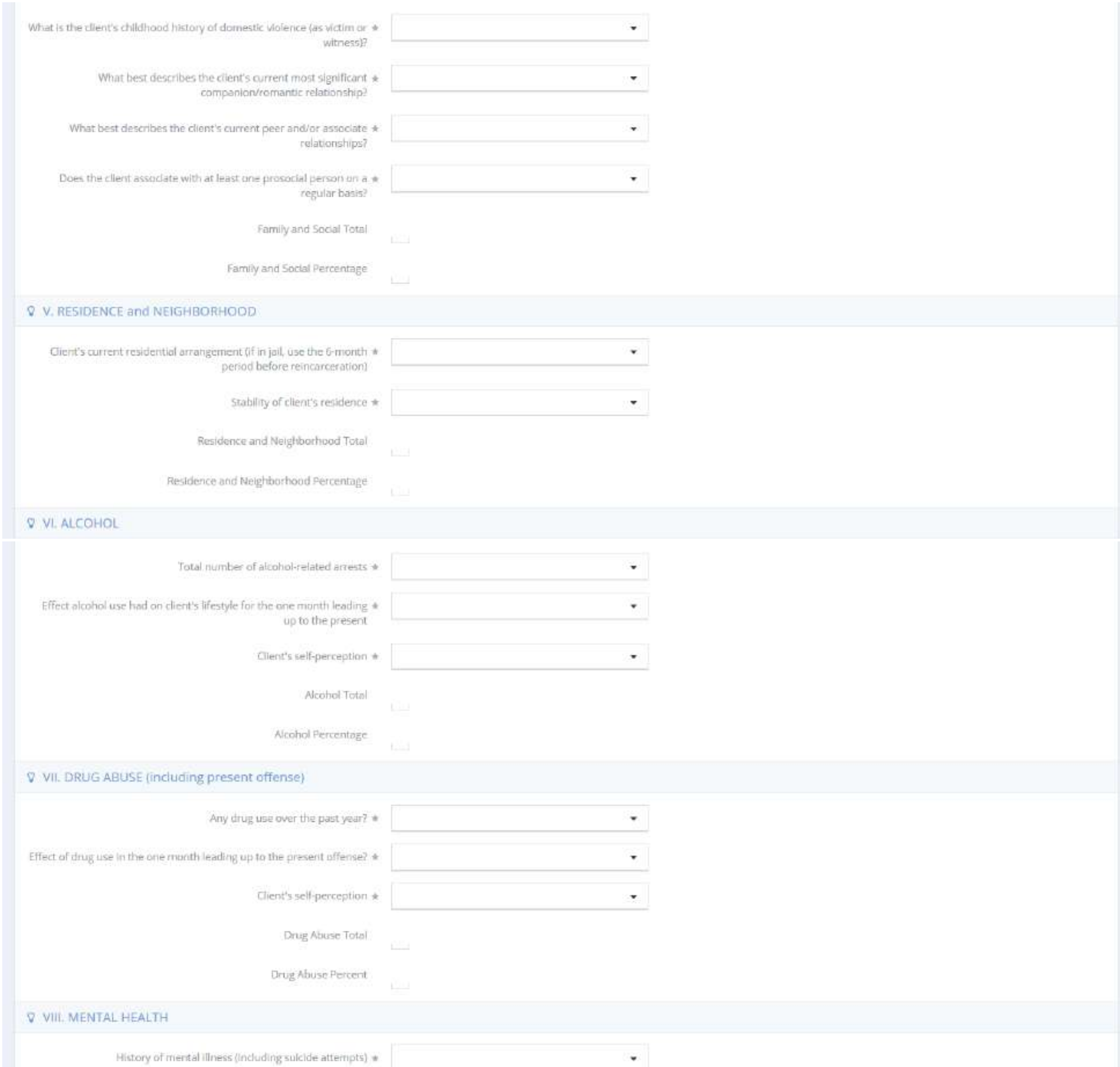


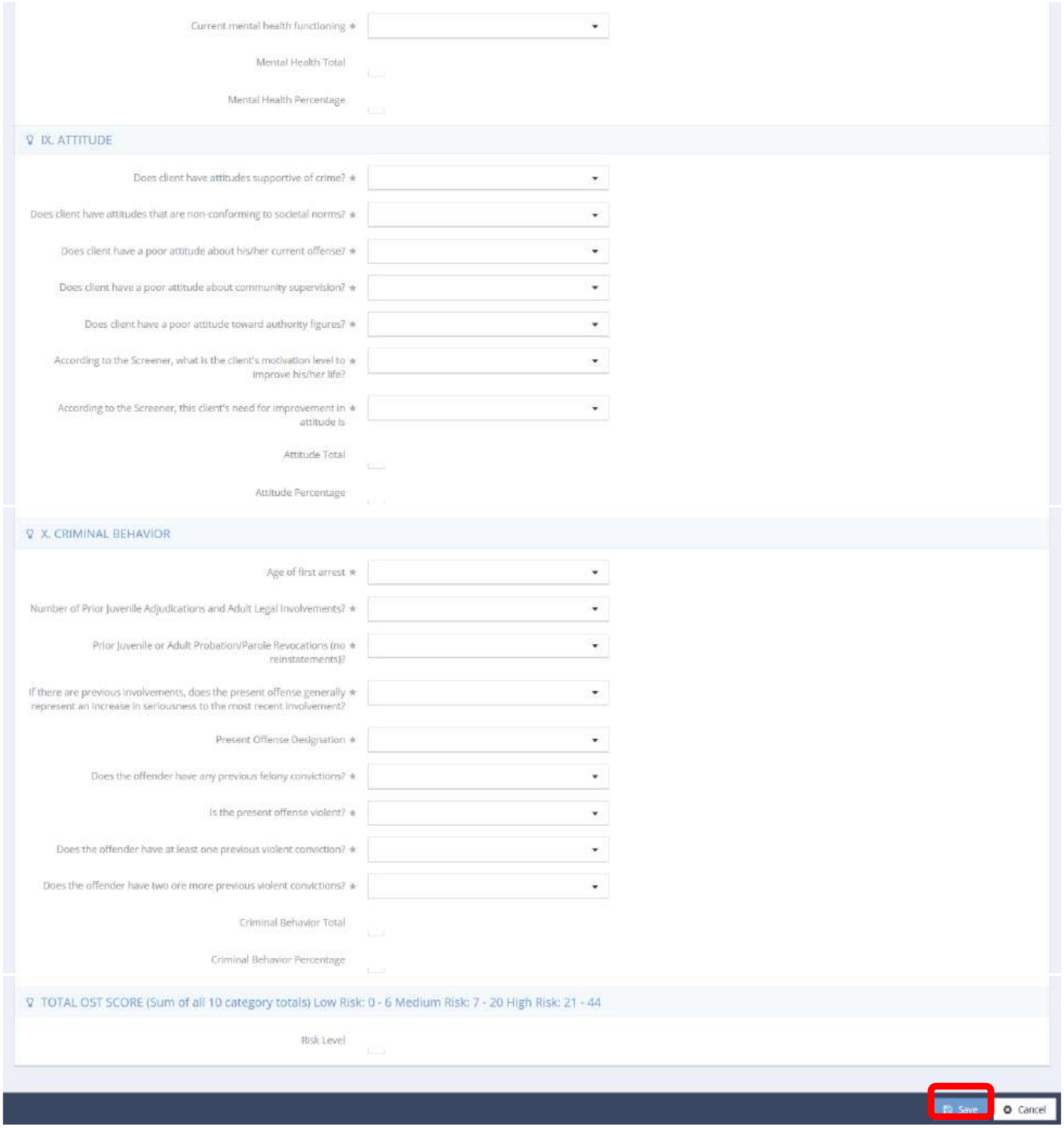
To edit an existing assessment, click the action gear icon associated with the desired assessment and select Edit from the menu options. Assessments can also be deleted from this location by selecting Delete from the menu options. To add a new assessment, click the Add New button.

Upon clicking Edit or the 

button, the Offender Screening Tool Input Form displays.



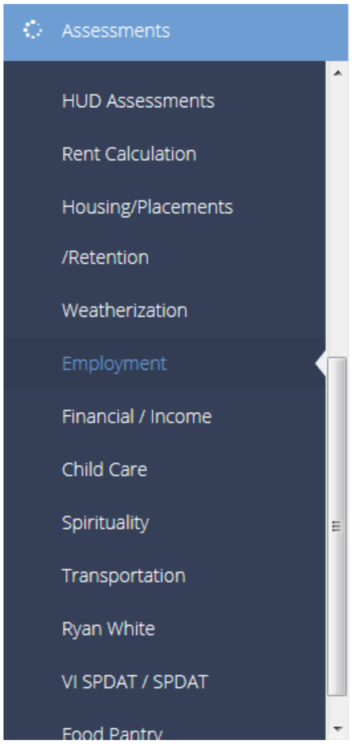

What is the client's childhood history of domestic violence (as victim or witness)? *
What best describes the client's current most significant companion/romantic relationship? *
What best describes the client's current peer and/or associate relationships? *
Does the client associate with at least one prosocial person on a regular basis? *
Family and Social Total
Family and Social Percentage
V. RESIDENCE and NEIGHBORHOOD
Client's current residential arrangement (if in jail, use the 6-month period before reincarceration) *
Stability of client's residence *
Residence and Neighborhood Total
Residence and Neighborhood Percentage
VI. ALCOHOL
Total number of alcohol-related arrests *
Effect alcohol use had on client's lifestyle for the one month leading up to the present *
Client's self-perception *
Alcohol Total
Alcohol Percentage
VII. DRUG ABUSE (including present offense)
Any drug use over the past year? *
Effect of drug use in the one month leading up to the present offense? *
Client's self-perception *
Drug Abuse Total
Drug Abuse Percent
VIII. MENTAL HEALTH
History of mental illness (including suicide attempts) *



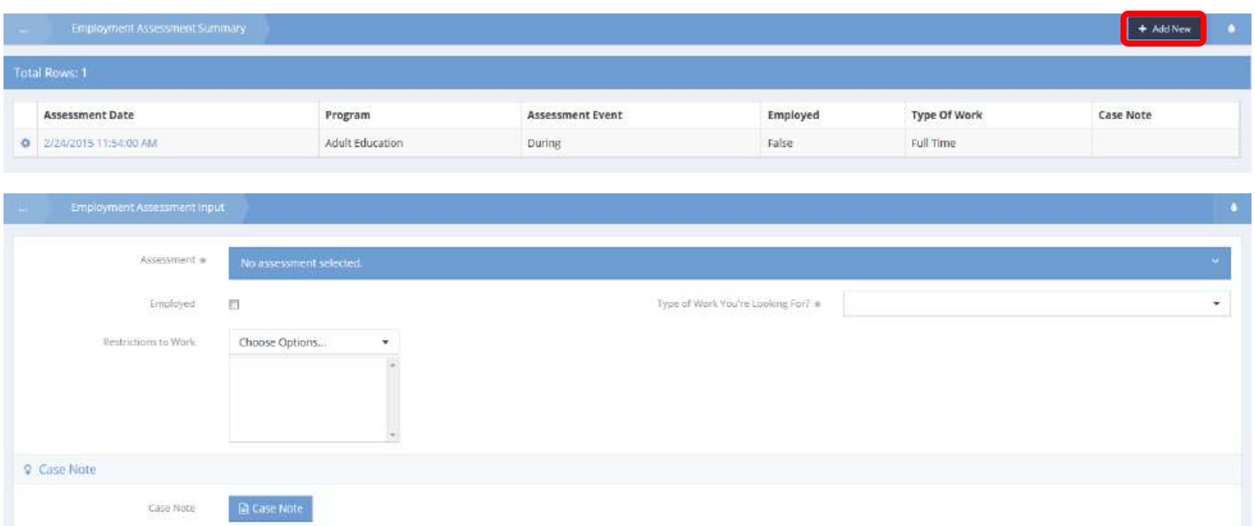
Select an assessment to use and edit, or enter information into all fields, as they are all required. Each section of the form provides a section total and percentage that come together to form a general risk level at the end of the form. These individual totals are also visible on the previous form, Offender Screening Tool Assessment Summary.

Click the  button to save and exit.

Employment



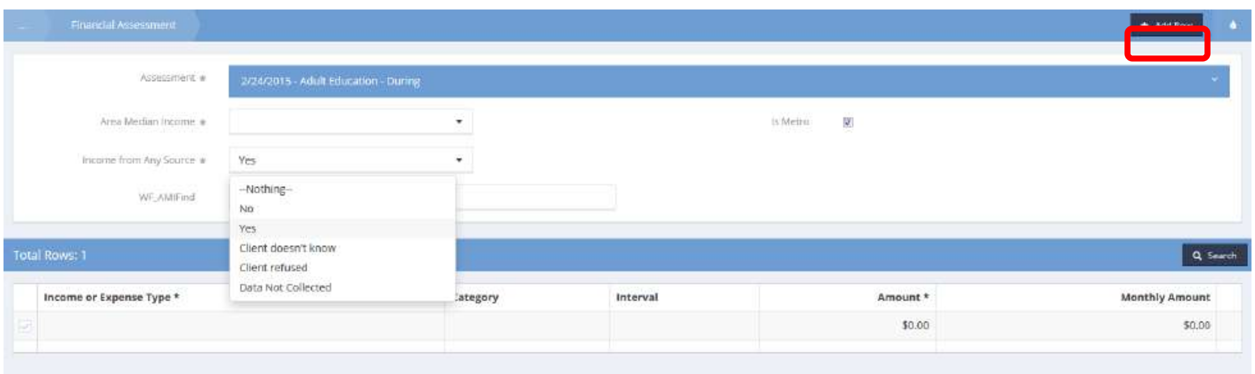
The next menu item in the Assessments menu group is the "Employment" summary form. This form tracks a client's employment status and potential barriers to employment.



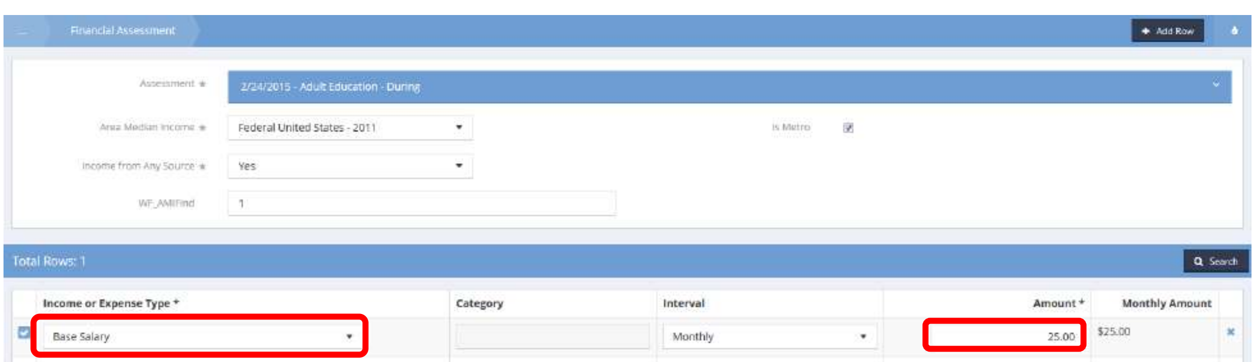
Financials

The next menu item in the Assessments menu group is the "Financials" summary form. The user can either add a spreadsheet financial assessment or a standard version with or without calculated totals. From the action gear on the summary form, the user can also add non-monthly cash equivalents. In a standard financial assessment, click + Add New (Non-HUD) in the top right corner, then select an income or expense type and enter an amount. For the spreadsheet financial assessment and the cash equivalents form, click the checkbox next to the income, expense or cash equivalent type, then enter the amount.

On the Financial Spreadsheet, if a client has no income or chooses to answer “Don’t Know” or “Refused” use the drop-down on the top of the form.

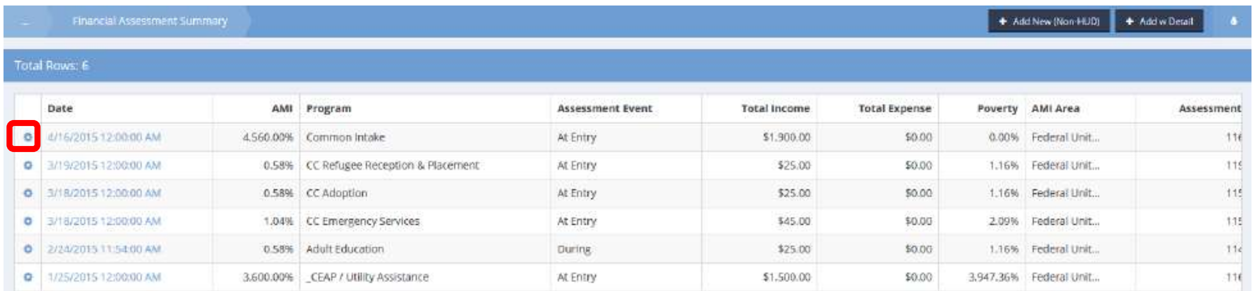


To enter an income type, click the checkbox next to the desired income type(s) and enter the amount received in the last 30 days.



Cash Equivalent - View Only

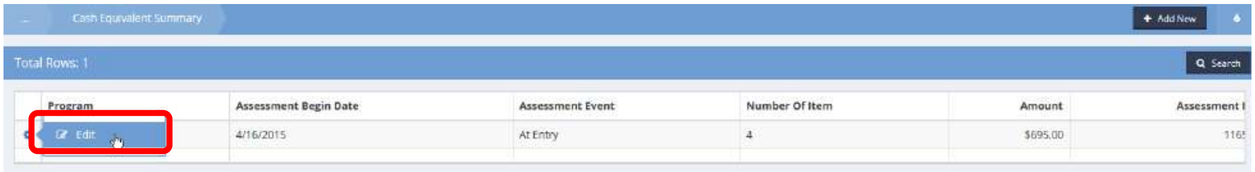
Objective: View a list of client cash and cash equivalent assets.



Click on the action gear icon associated with the desired assessment. Select View Cash Equivalent from the pop up menu that appears.

The Cash Equivalent Summary form displays.

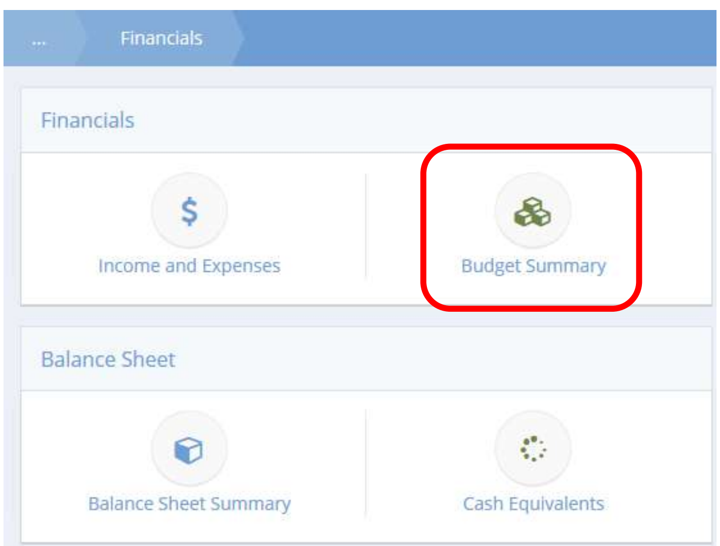
To view a list of cash and cash equivalents held by the client, click the action gear and click Edit.



The Cash Equiv. Assessment form displays.

Budget Financial Summary

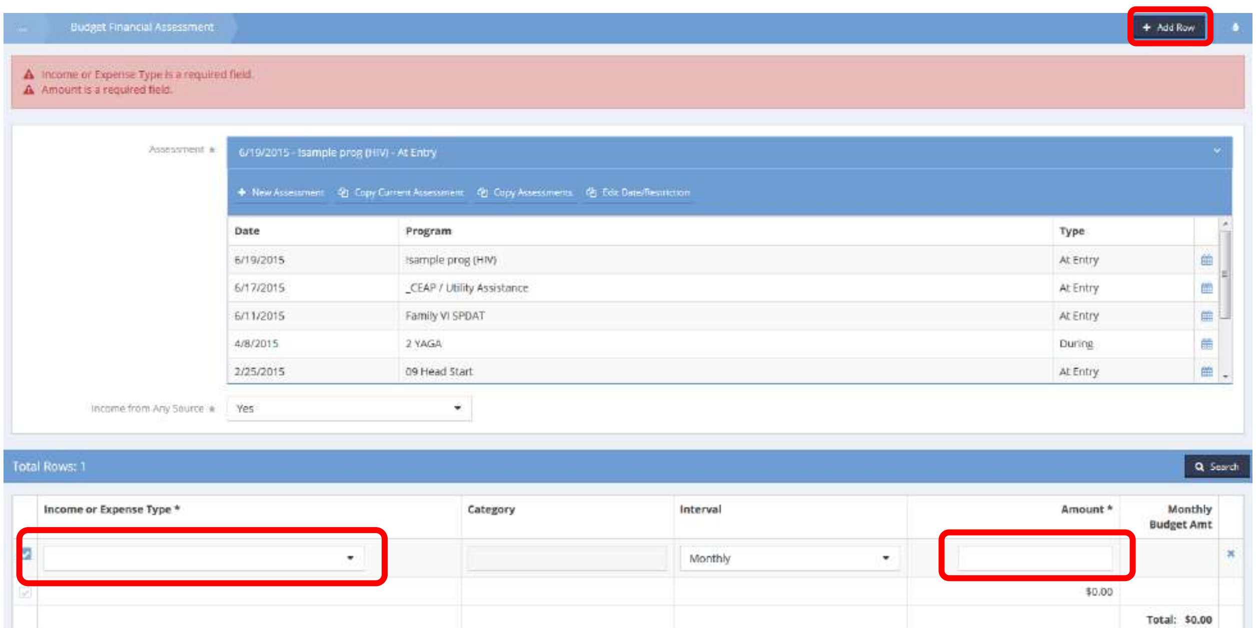
Objective: View and manage budget financial assessments.



Click the icon for Budget Summary. The Budget Financial Summary form displays.

To add a new Budget Assessment, click the **+ Add New** button.

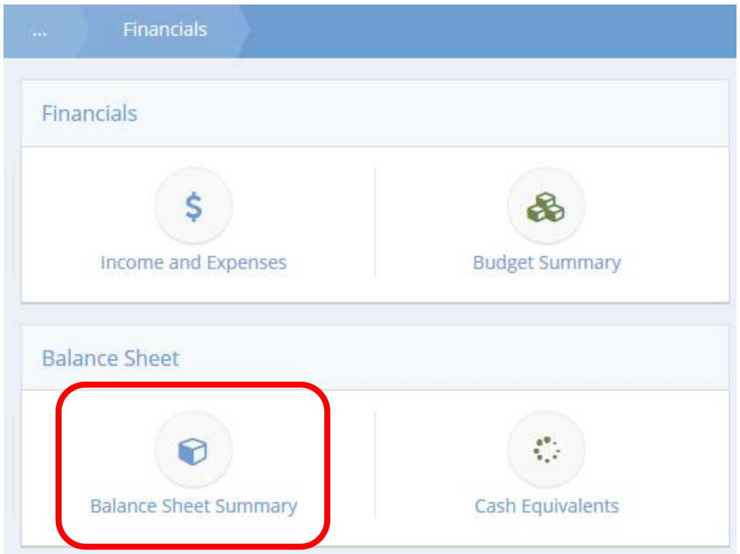
The Budget Financial Assessment form displays.



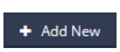
After selecting an assessment or creating a new assessment, select an income or expense type from the drop-down list and enter an amount. Repeat for every financial item desired to be added using the **+ Add Row** button. Click **Save** when finished.

Assets and Liabilities Detail

Objective: View balance sheet for financial assessment.

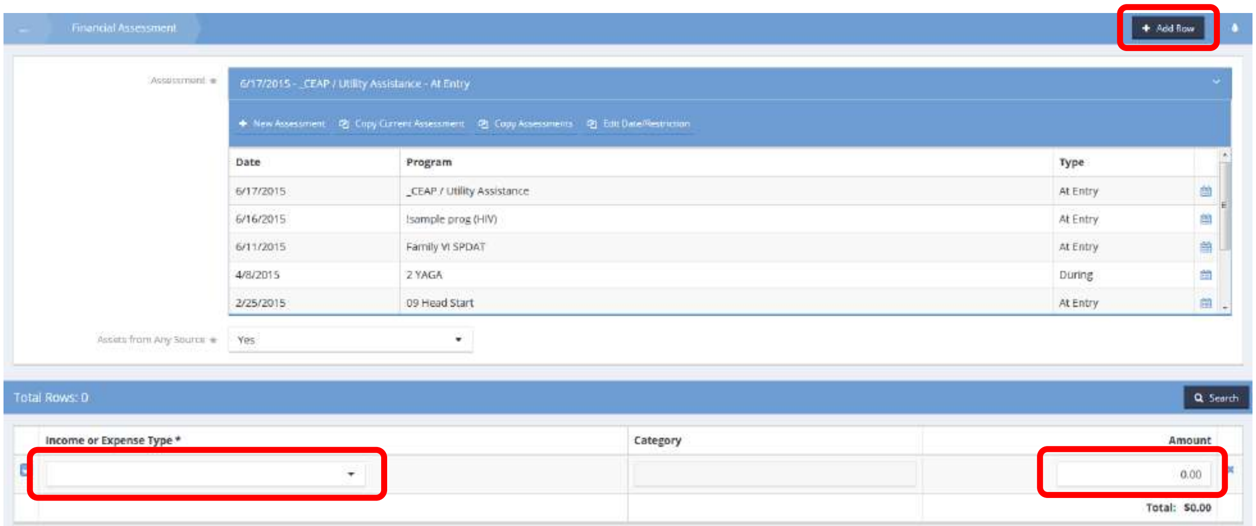


Click the icon for Balance Sheet Summary. The Balance Sheet Summary displays.

Click the 

button to add a new Financial Assessment.

The Financial Assessment form displays.

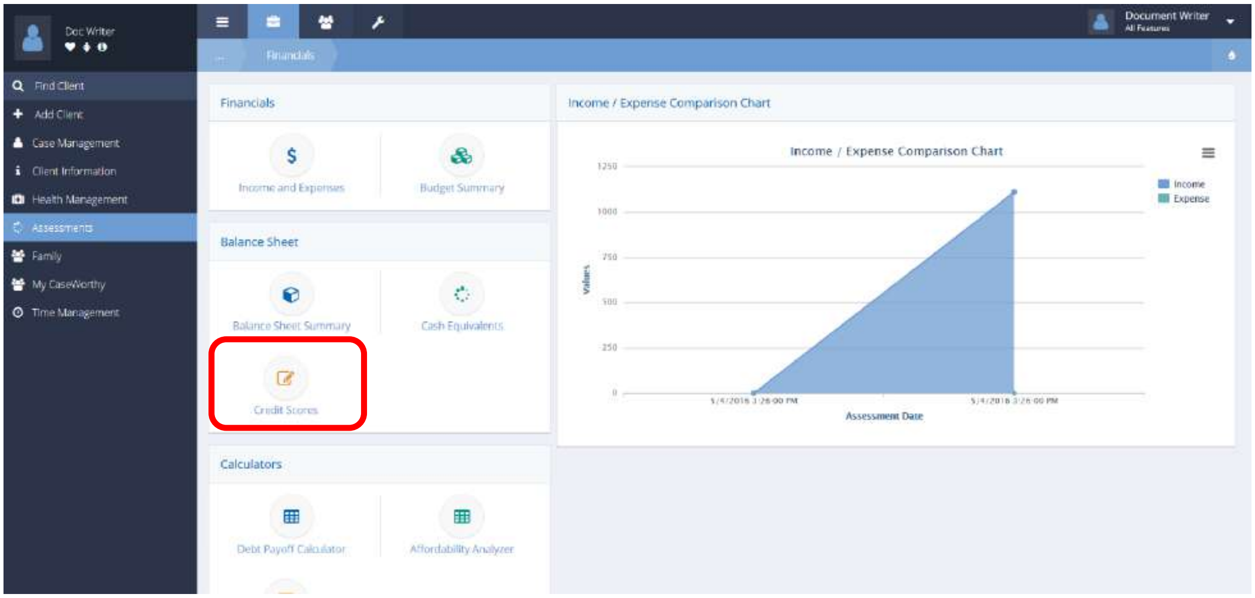


After selecting an assessment or creating a new assessment, select an income or expense type from the drop-down list and enter an amount. Repeat for every financial item desired to be added using the **+ Add Row** button. Click **Save** when finished.

Credit Scores

Objective: View and add client credit score details.

Navigation: Case Management>Assessments>Financials



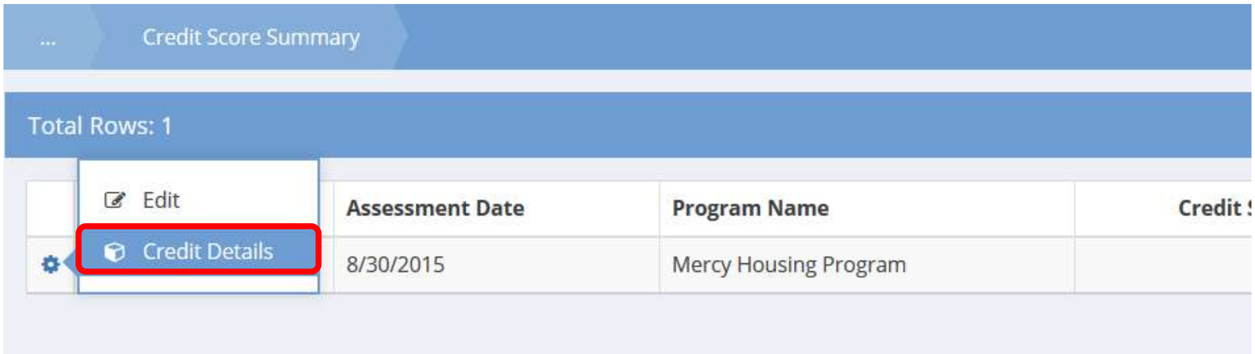
Select Credit Scores from the Balance Sheet portion of the Financials dashboard.

The Credit Score Summary form displays.

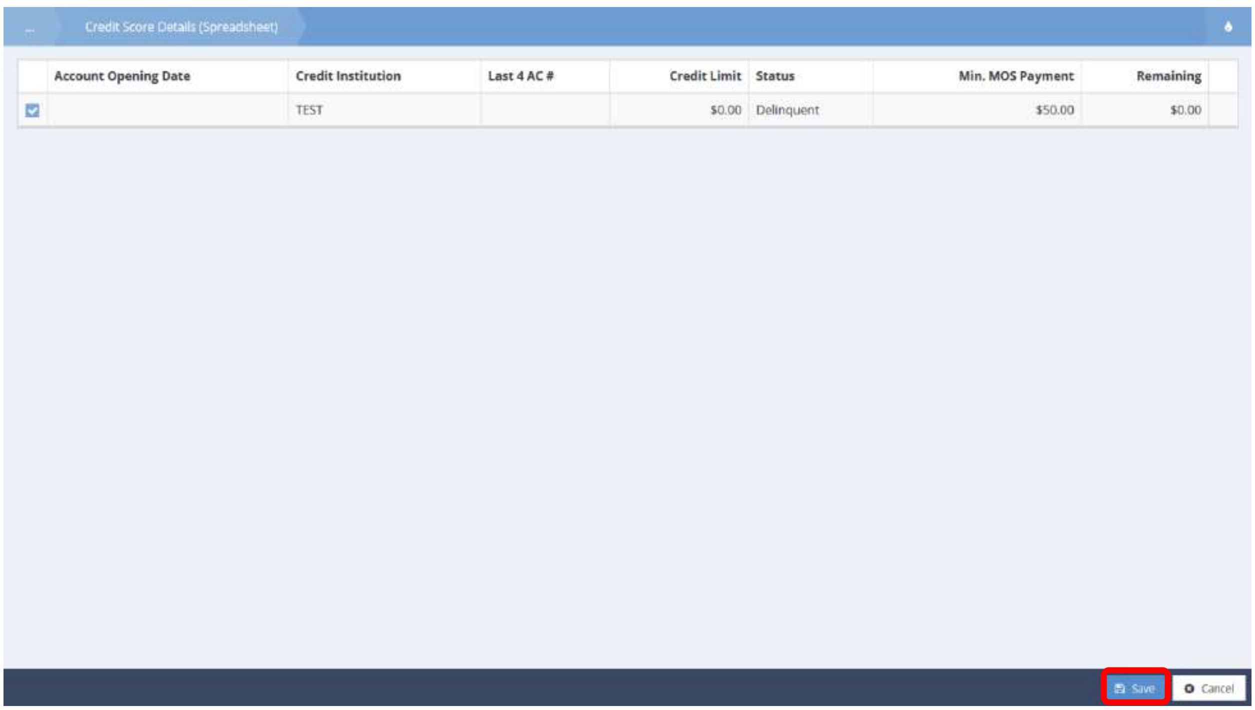
	Created Date	Assessment Date	Program Name	Credit Score	Debt Amount	Score Source	Assessment ID
	5/4/2016	8/30/2015	Mercy Housing Program	215		Experian	14814

To edit or view credit details, click the action gear icon associated with the desired entry and select from the menu options.

Select Credit Details from the menu options.



The Credit Score Details (Spreadsheet) form displays.



Click the blue checkbox  icon to edit an entry. The row expands for editing.

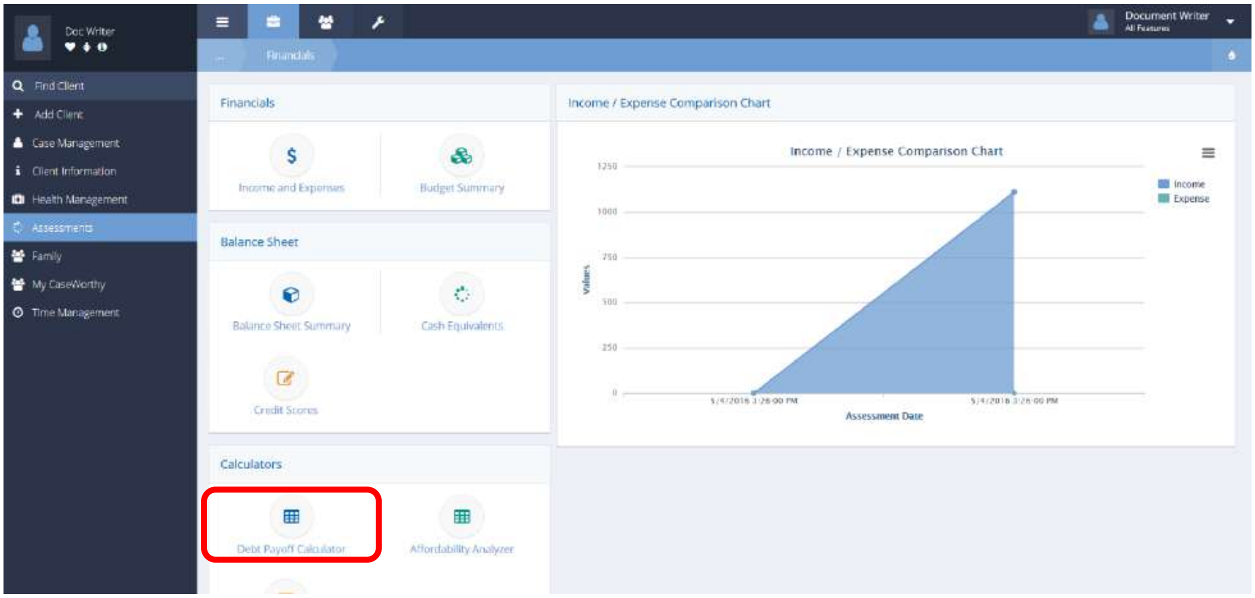
Make any desired changes. Click the 

button to save and exit.

Debt Payoff Calculator

Objective: Calculate client debt payoff plan.

Navigation: Case Management>Assessments>Financials



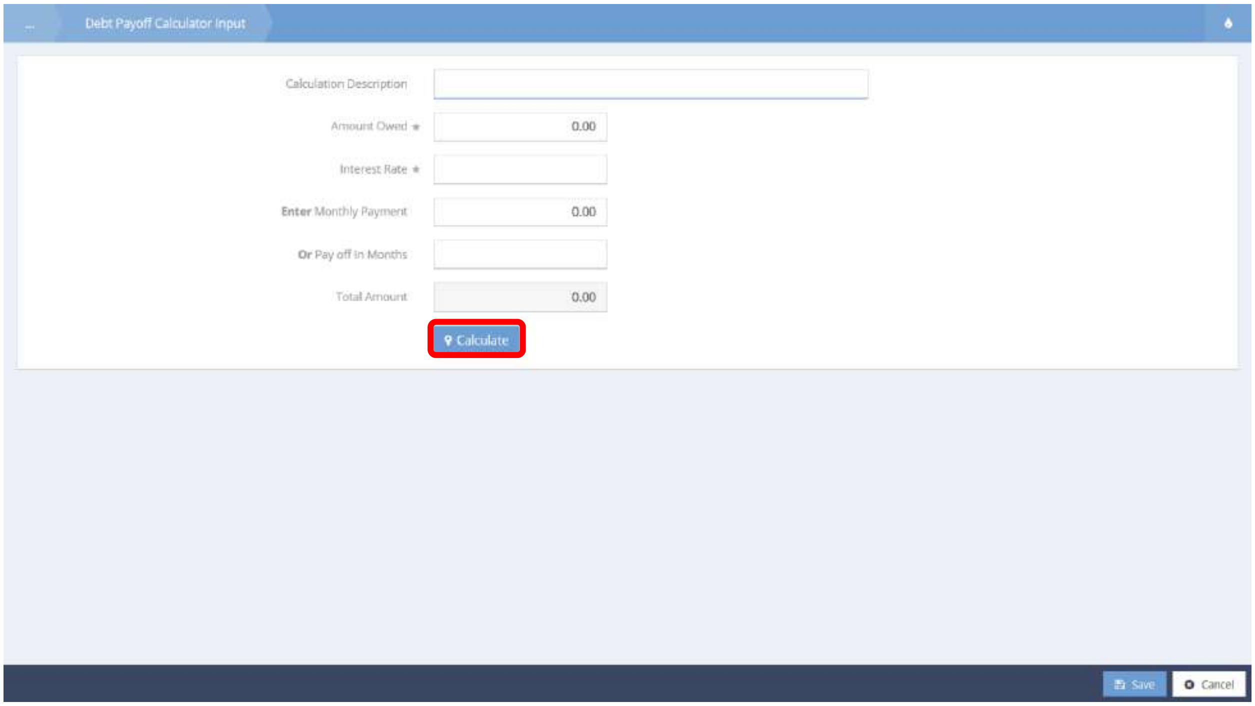
Select Debt Payoff Calculator from the Calculators portion of the Financials dashboard.

The Debt Payoff Calculator Summary form displays.

Calculation Description	Calculation Date	Amount Owed	Interest Rate	Monthly Payment	Pay off In Months	Total Amount
Rent 2016 Test	5/19/2016	$5,000.00	0.02%	$500.00	11	$5,500.00
Calculate Doc	5/19/2016	$5,550.00	0.05%	$50.00	112	$5,600.00
Doc Test 1	5/19/2016	$540.00	0.02%	$50.00	11	$550.00

To edit a calculation, click on the action gear icon associated with the desired calculation and select Edit from the pop up menu that appears. To add a new calculation, select the + Add New button.

The Debt Payoff Calculator Input form displays in either case.

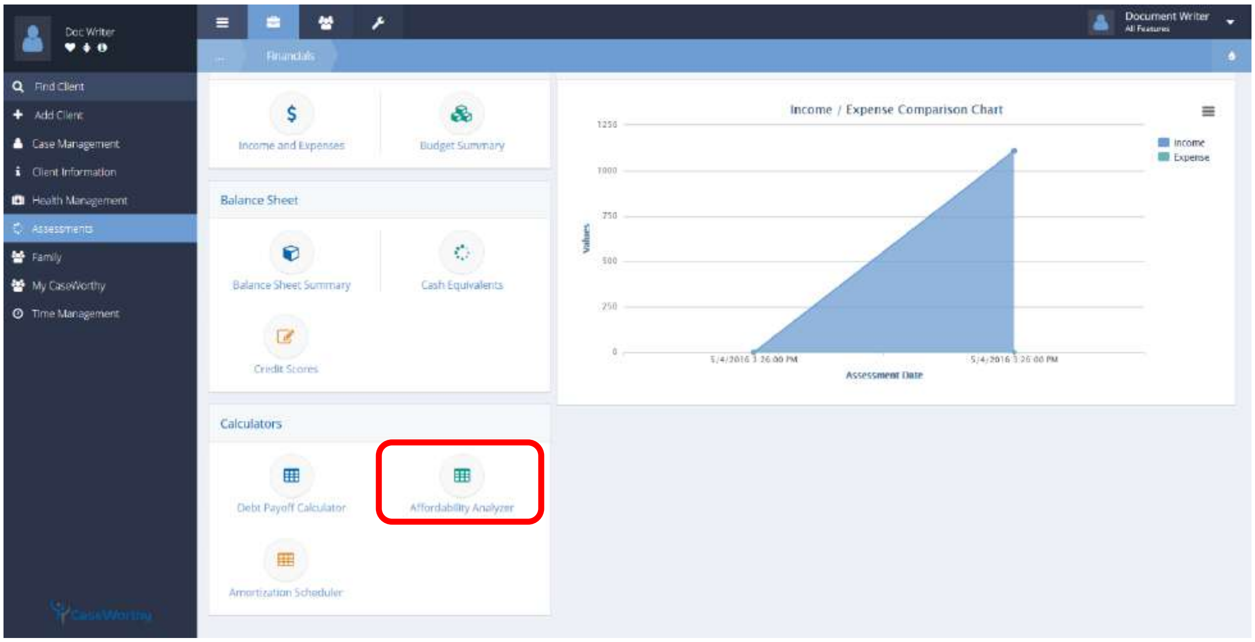


Enter information into required fields: Amount Owed and Interest Rate. Provide a Calculation Description if desired. Enter either the desired monthly payment amount or the desired number of months. Click the Calculate button. The remaining fields populate with the calculation results. Click the Save button to save. Click the Cancel button to exit.

Affordability Analyzer

Objective: Determine maximum home purchase price.

Navigation: Case Management>Assessments>Financials



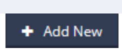
Select the Affordability Analyzer from the Calculators portion of the Financials dashboard.

The Affordability Analyzer Calculator Summary form displays any existing, saved calculations.

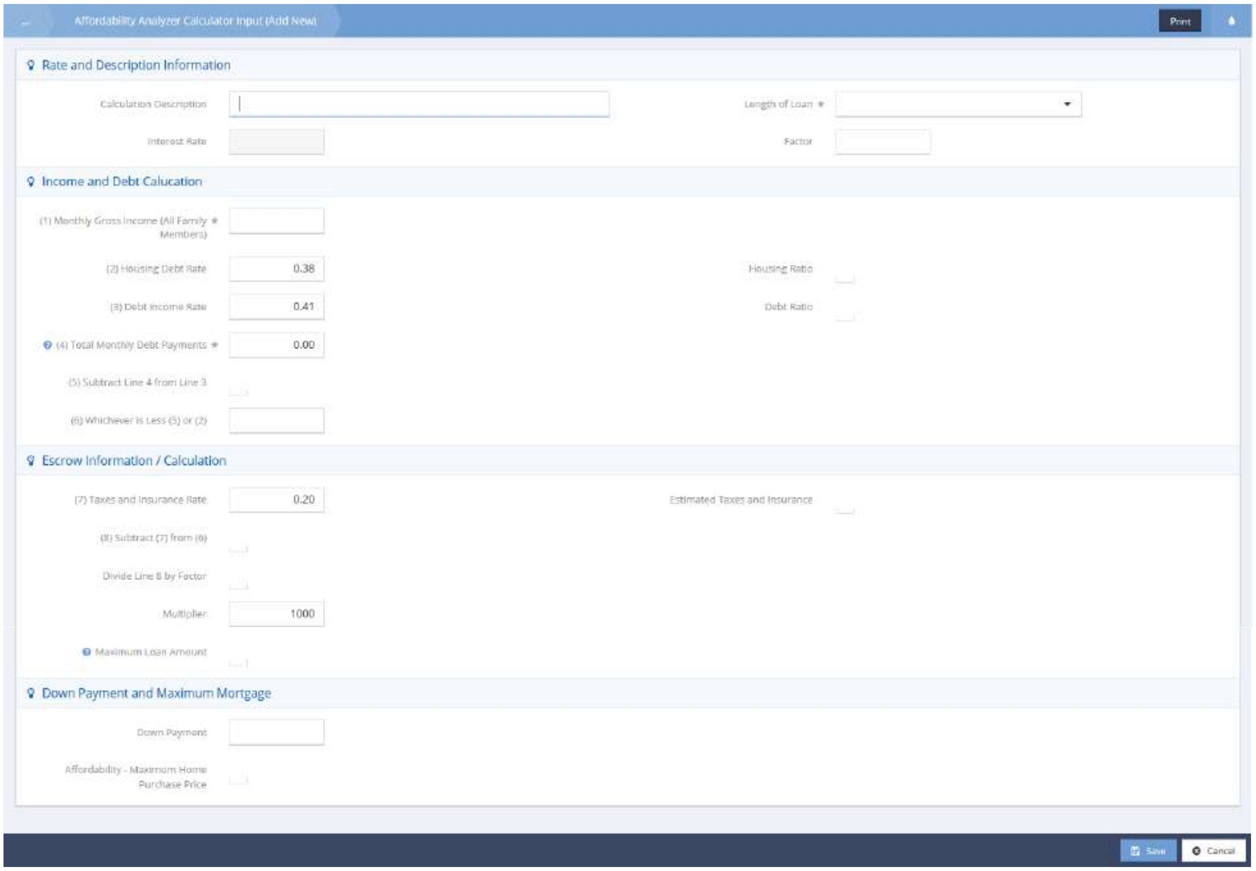
Affordability Analyzer Calculator Summary

+ Add New

Calculation Date	Calculation Description	Length of Loan	Monthly Gross Income	Monthly Debt Payments	Interest Rate	Down Payment	Affordability
12/18/2015	15 Year Loan Test Again	15 Year Mortgage	$3,000.00	$100.00	4.00%	$5,000.00	$179,423.48
12/16/2015	Test 15 Year Loan	15 Year Mortgage	$3,000.00	$150.00	4.00%	$4,000.00	$170,037.74

To add a new calculation, click the  button.

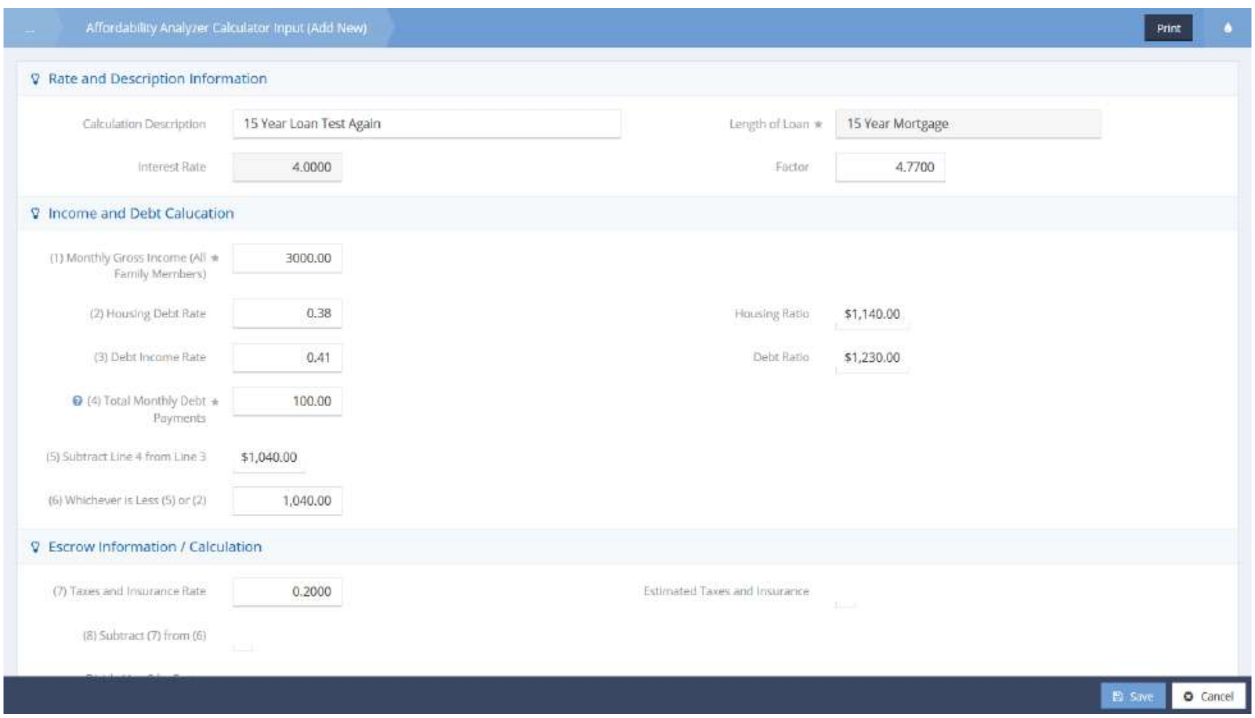
The Affordability Calculator Input (Add New) form displays.



Fields, (2) Housing Debt Rate and (3) Debt Income Rate present default values, but are editable. Enter information into required fields: Length of Loan, 15/30 Year Int. Rate (appears upon selection of Length of Loan), (1) Monthly Gross Income (All Family Members), (4) Total Monthly Debt Payments, and Down Payment. Remaining fields auto populate at the input of information into required fields. To auto populate the Escrow Information / Calculation section of the form, simply click within the section. Click the Print button to print. Click the Save button to save and exit.

To edit an existing calculation, select the action gear icon associated with the desired entry and select edit from the menu.

The Affordability Analyzer Calculator Input (Add New) form displays.

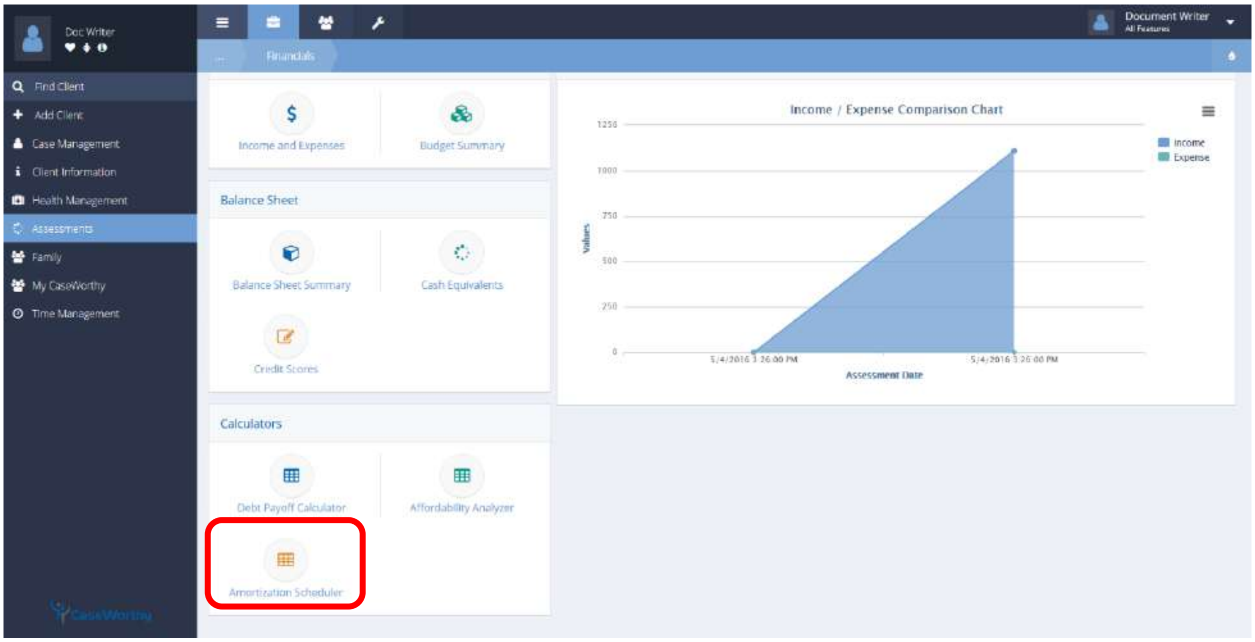


This form utilizes the same functionality as the previous Affordability Analyzer Calculator Input (Add New) form. Make any necessary or desired changes and click the Save button to save. Click the Cancel button to exit.

Amortization Scheduler

Objective: Calculate and view amortization payment schedule.

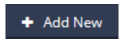
Navigation: Case Management>Assessments>Financials



Select the Amortization Scheduler from the Calculators portion of the Financials dashboard.

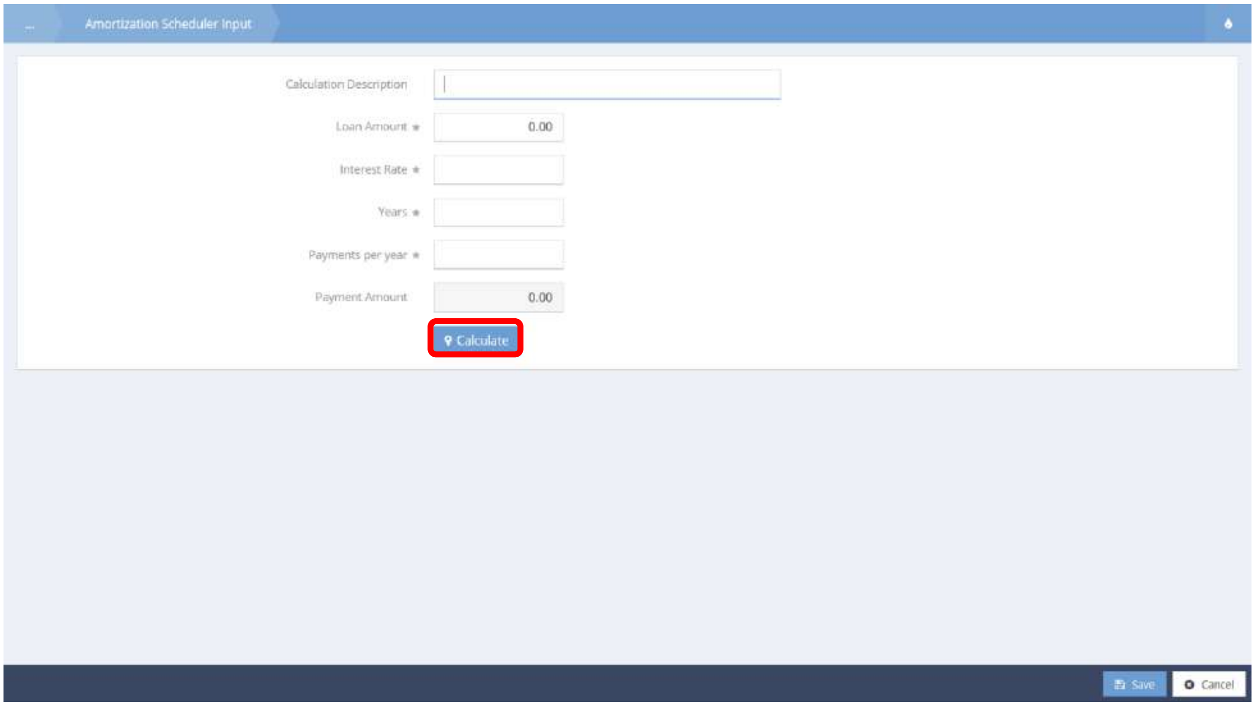
The Amortization Scheduler Input form displays existing amortization schedules.

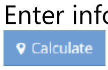
To edit an existing calculation, click the action gear icon associated with the desired calculation and select Edit from the menu. Identical forms are used to edit and add new.

To add a new calculation, select the 

button.

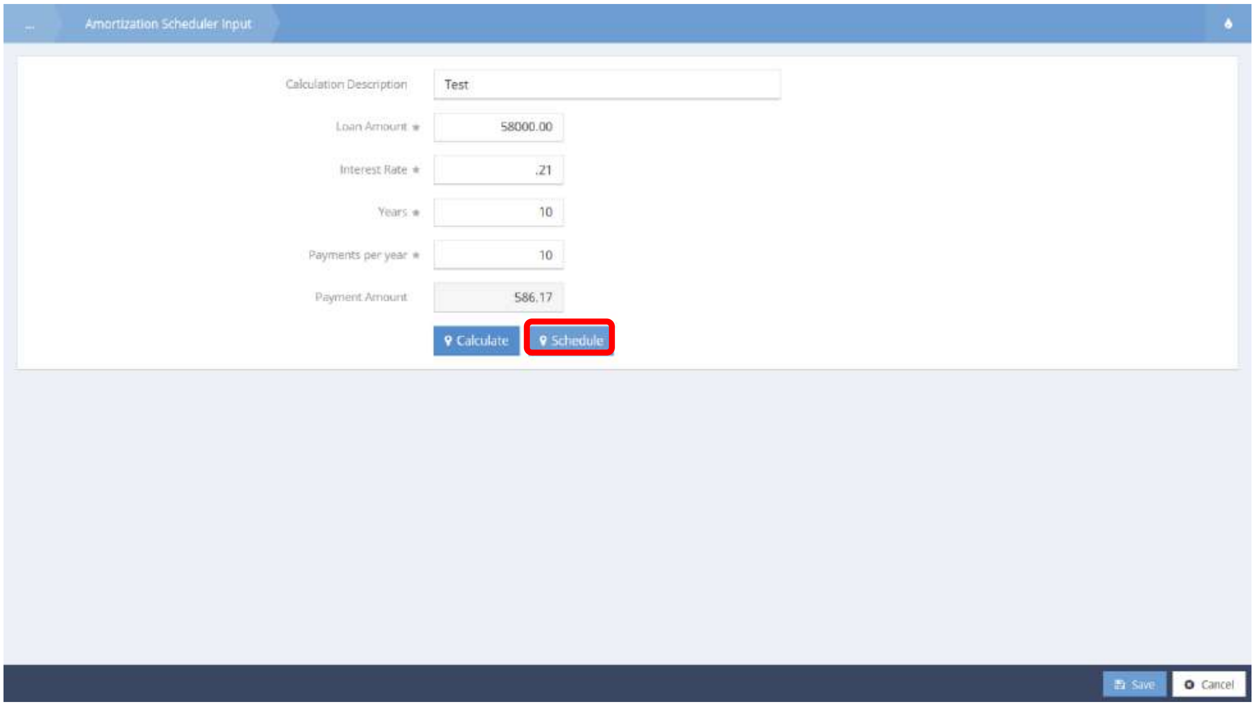
The Amortization Scheduler Input form displays.



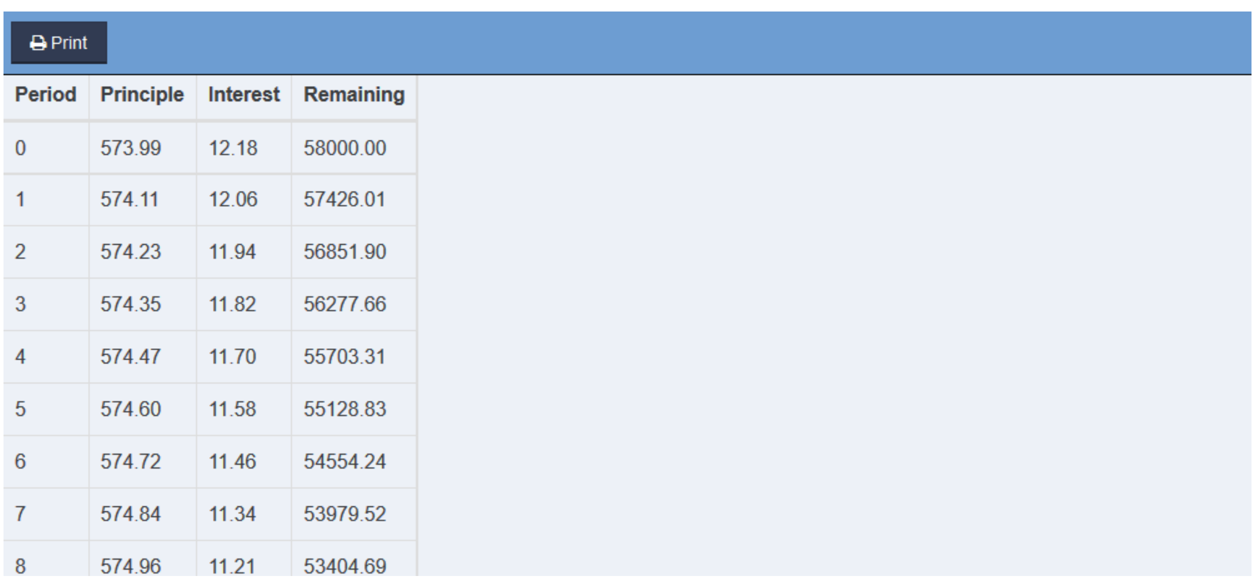
Enter information into required fields: Loan Amount, Interest Rate, Years, and Payments per year. Click the 

button.

The Payment Amount field auto populates according to information entered.

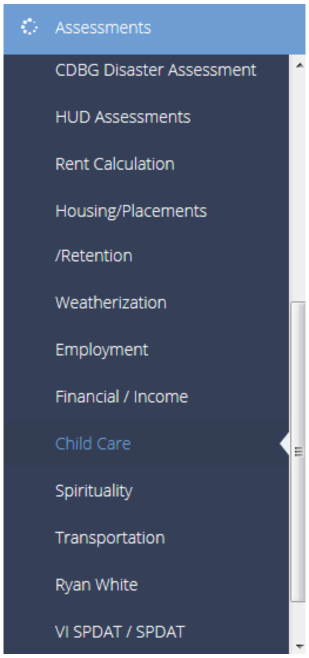


The Schedule button appears upon calculation. Click the Schedule button to view payment schedule. A new popup window appears. Print or save as necessary. Click the Save button to save and exit.



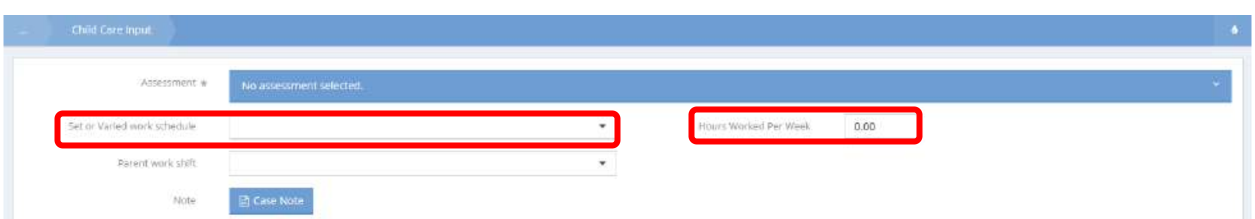
Period	Principle	Interest	Remaining
0	573.99	12.18	58000.00
1	574.11	12.06	57426.01
2	574.23	11.94	56851.90
3	574.35	11.82	56277.66
4	574.47	11.70	55703.31
5	574.60	11.58	55128.83
6	574.72	11.46	54554.24
7	574.84	11.34	53979.52
8	574.96	11.21	53404.69

Child Care



The next menu item in the Assessments menu group is the "Child Care" summary form.

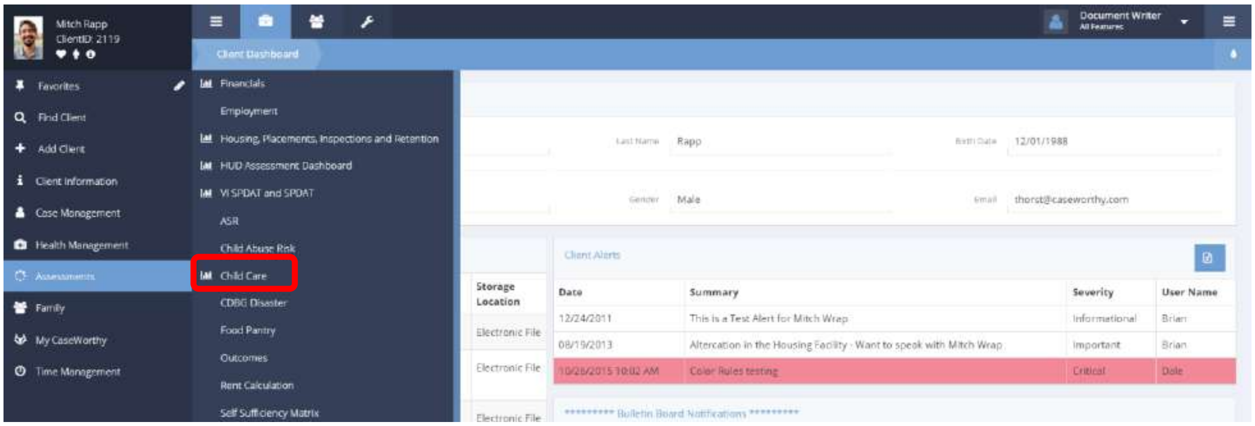
This form allows the user to track specific details related to a client's child care needs. Enter hours worked per week, then select varied or set schedule. If set schedule is chosen, select the specific days that the client works.



Child Feeding Instructions

Objective: Allow parents to dictate various feeding instructions for their children.

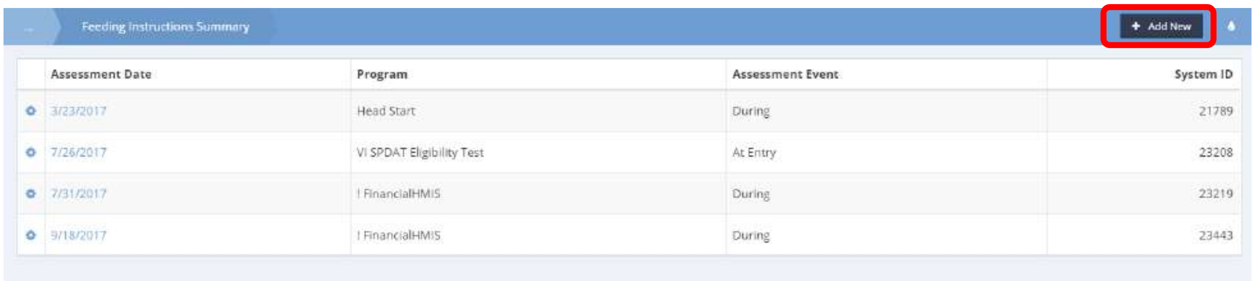
Navigation: Case Management>Assessments>Child Care>Feeding Instructions>...Add New



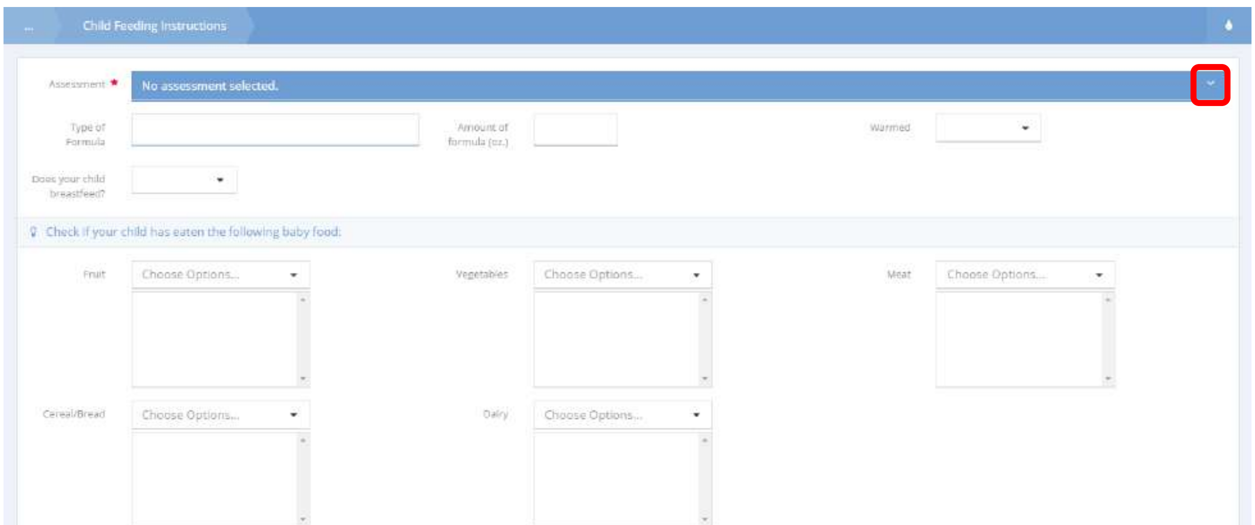
Under the Client Dashboard click Assessments to view a pop-up menu. Select the Child Care dashboard from the menu. The Child Care dashboard appears.

Click the Feeding Instructions icon.

The Feeding Instructions Summary page appears.

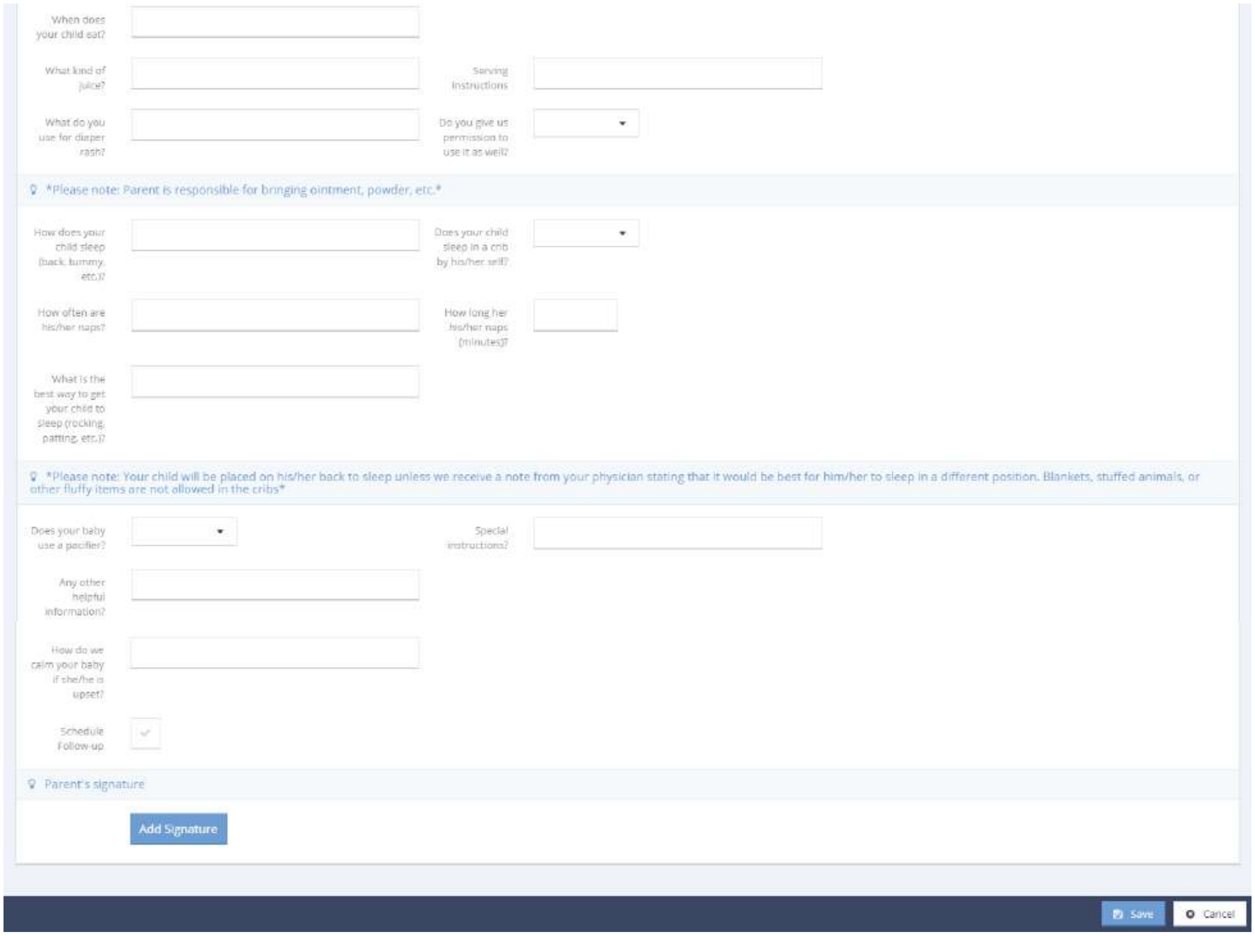


Click the **+ Add New** button to view the Child Feeding Instructions form. The Child Feeding Instructions form displays.

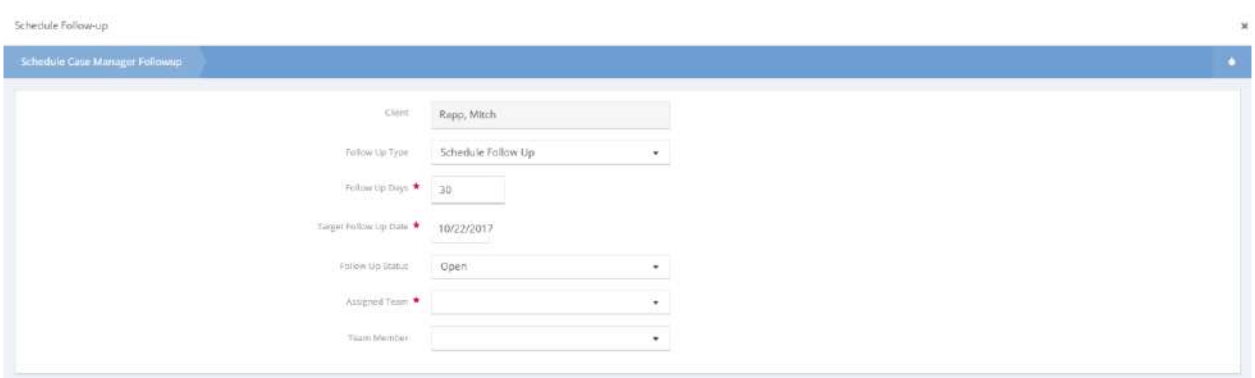


Select an assessment to copy or add a new assessment. Fill in the form by using the drop-down menus or manually typing in information.

Scroll down to view the rest of the form.



To schedule a follow-up, click the icon. The Schedule Case Manager Followup form appears. Some information auto populates. Enter any remaining information.

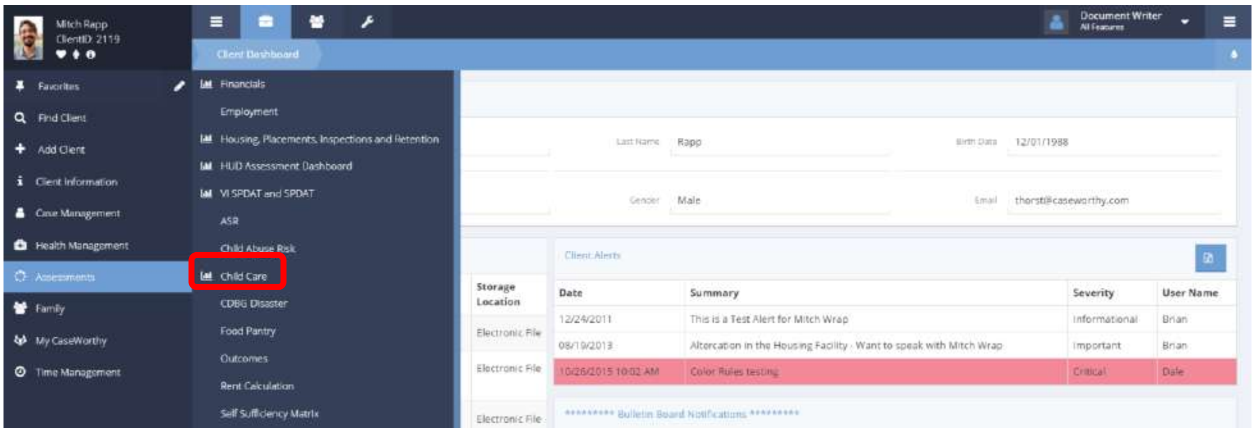


Click the Update button at the bottom of the form to return to the Child Feeding Instructions form. To add a signature, click the Add Signature button at the bottom of the form. Click the Save button to save the form and return to the Feeding Instructions Summary page.

Infant Feeding Preferences

Objective: Record parent dictated feeding preferences for infants at different age milestones.

Navigation: Client Dashboard>Assessments>Child Care>...Feeding Preferences



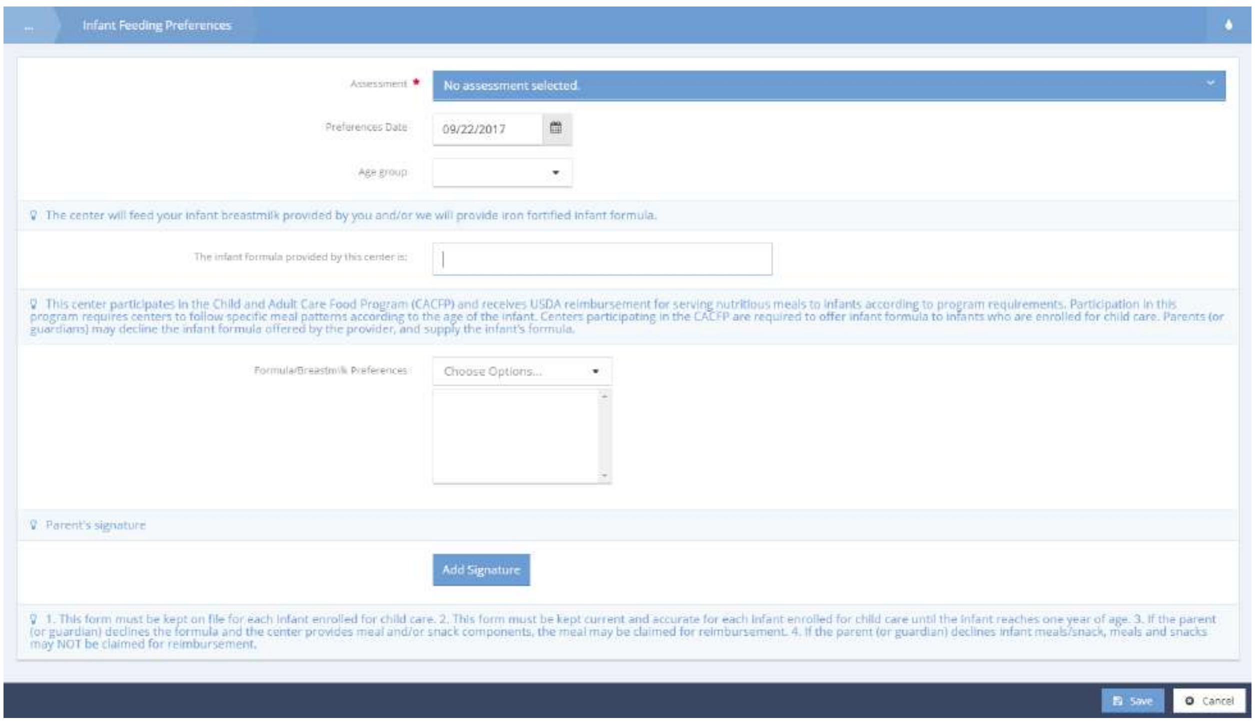
Under the Client Dashboard click Assessments to view a pop-up menu. Select the Child Care dashboard from the menu. The Child Care dashboard appears.

Click the Feeding Preferences icon.

The Infant Feeding Preference Summary page appears.

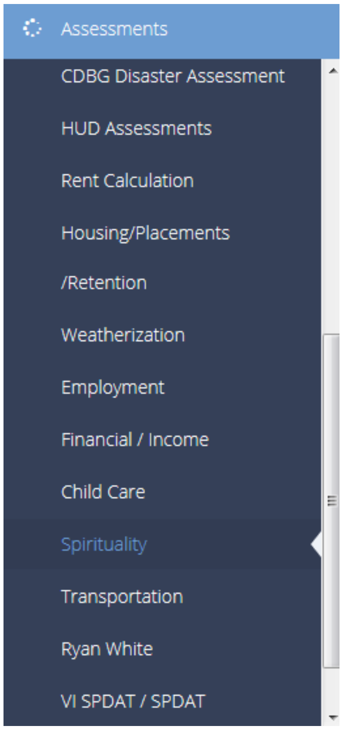
Assessment Date	Program	Assessment Event	System ID
7/31/2017	! FinancialHMIS	During	23219
7/26/2017	Work Therapy Program	During	23204
7/6/2017	12 Permanent Housing for Homeless Disabled	During	23146

Click the Add New button to view the Infant Feeding Preferences form. The Infant Feeding Preferences form displays.



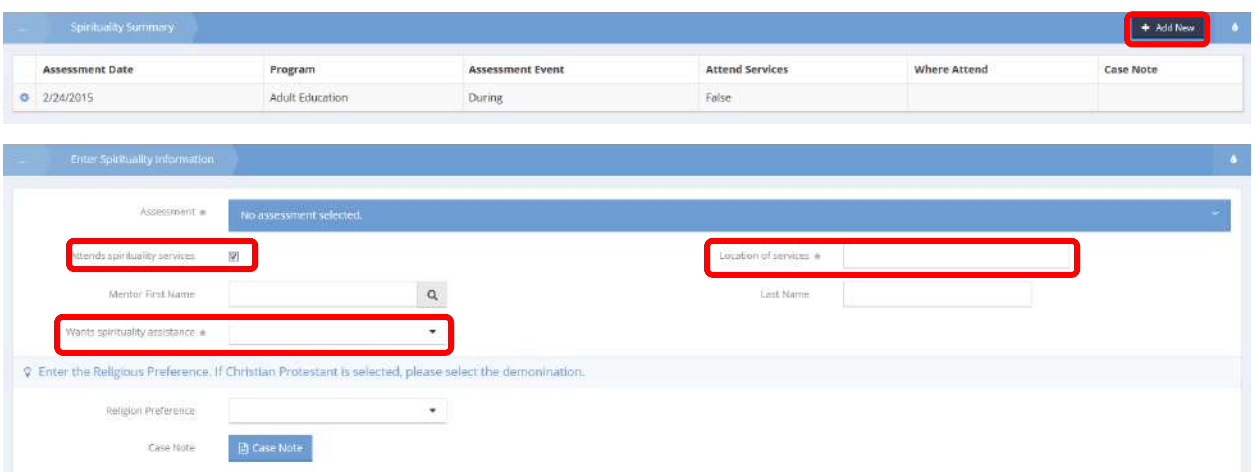
Select an assessment to copy or add a new assessment. Fill in the form by using the drop-down menus or manually typing in information. To add a signature, click the Add Signature button. Click the Save button to save the form and return to the Infant Feeding Preference Summary page.

Spirituality

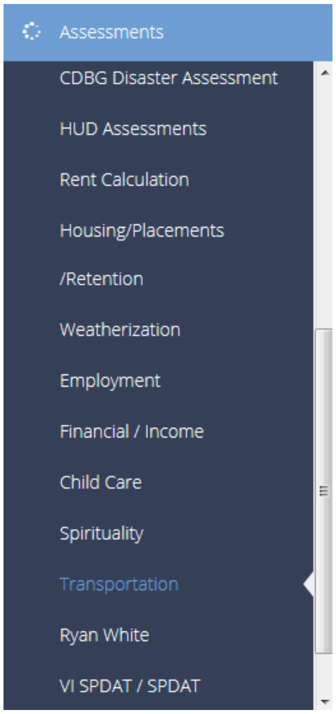


The next menu item in the Assessments menu group is the "Spirituality" summary form.

This form allows the user to track a client's religious preferences and needs. Use the check box to denote if the client attends services. If they do, specify where they attend service. Select whether or not the client wants spirituality assistance.

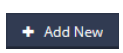


Transportation



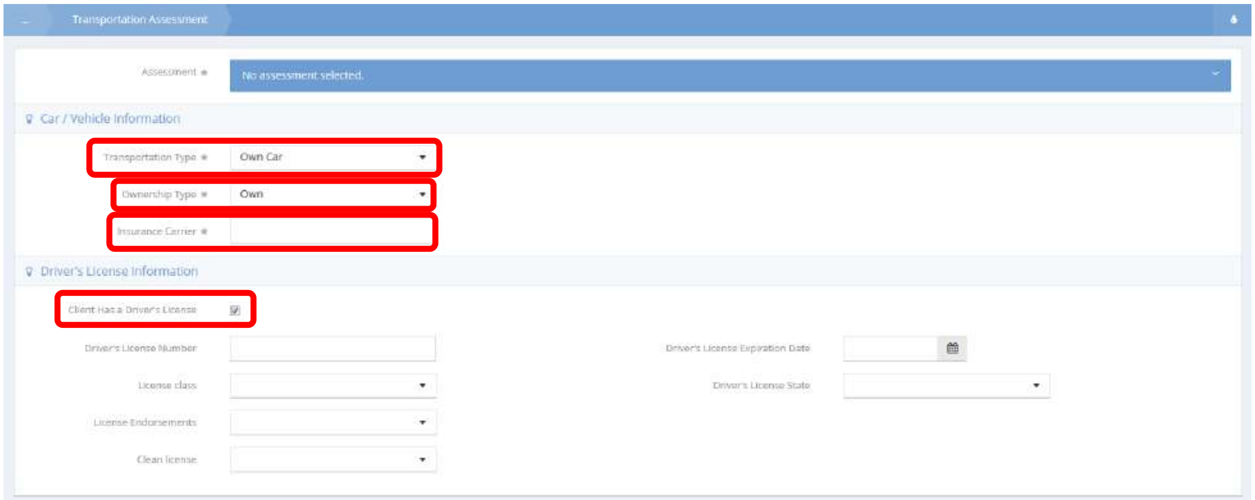
The next menu item in the Assessments menu group is the "Transportation" assessment.

This form allows the user to track a client's transportation needs and automobile specifics. Select a transportation and ownership type. If the client owns a vehicle, enter the insurance carrier. If the client has a driver's license, enter specific details related to their license.

On the Transportation Summary form, click the 

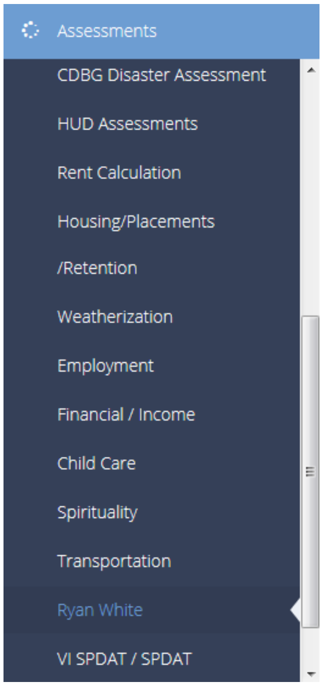
button.

The Transportation Assessment form displays.



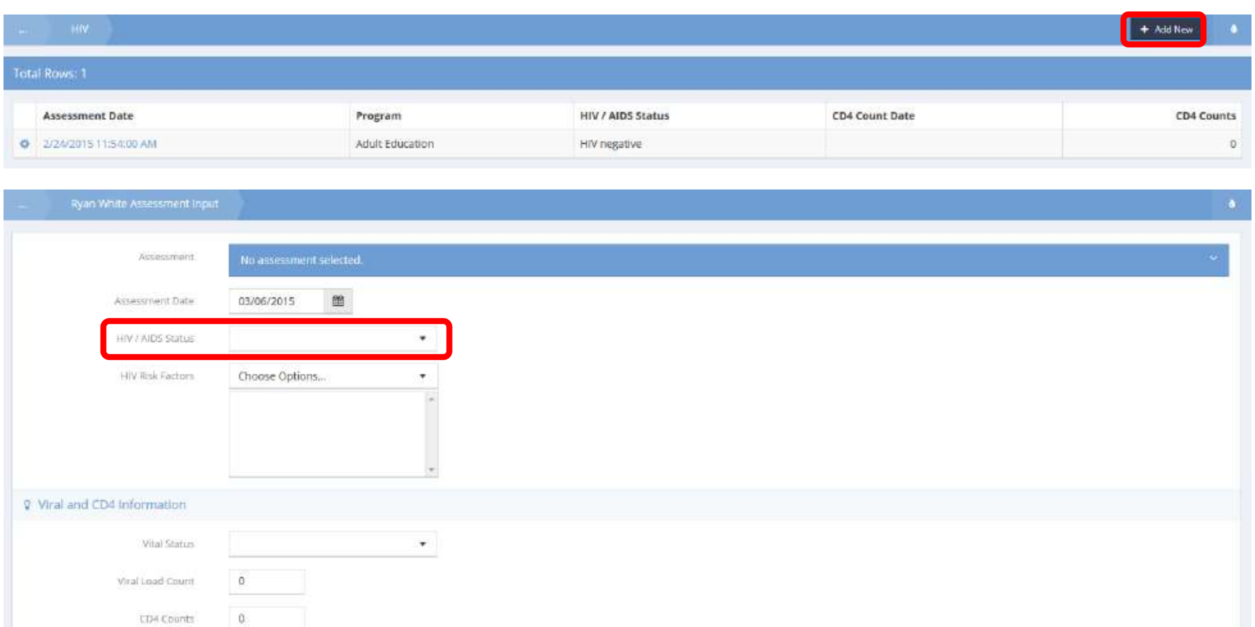
Click on the No assessment selected. area of the Assessment field and choose an existing assessment or create a new one. Select a transportation type, ownership type, and driver's license info if applicable. Click on the Save button when finished.

Ryan White



The next menu item in the Assessments menu group is the "Ryan White" summary form.

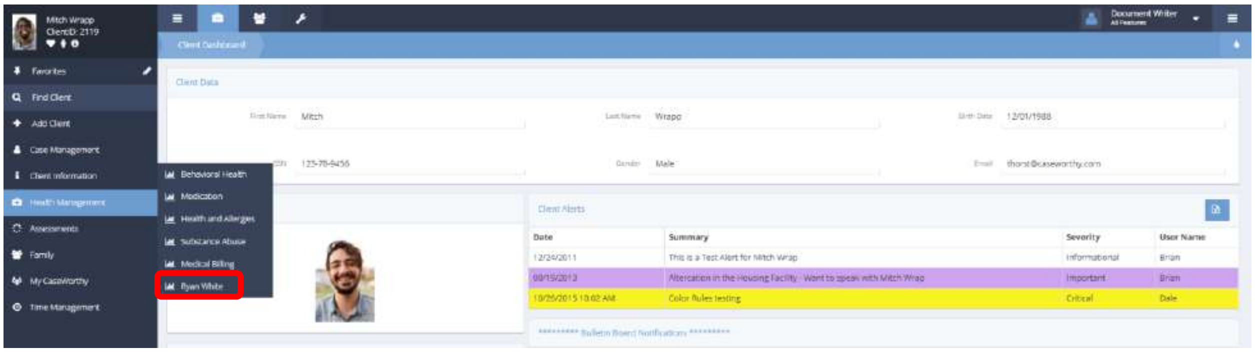
This form stores specific HIV/AIDS data, related to the Ryan White grant. Select the client's HIV/AIDS status, then enter appropriate related data based upon status.



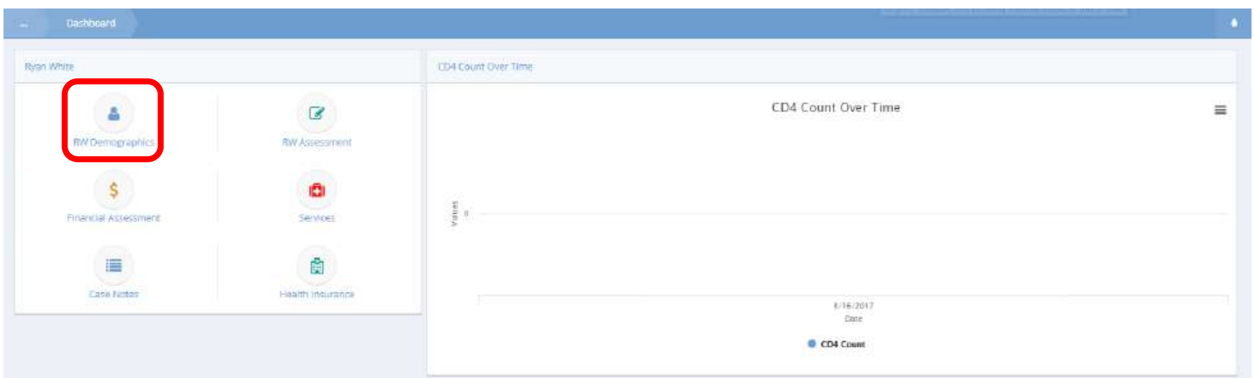
Add Client Demographics – RW

Objective: Demographics form for programs funded by Ryan White.

Navigation: Case Management>Health Management>Ryan White>Ryan White Demographics>Add Client Demographics – Ryan White

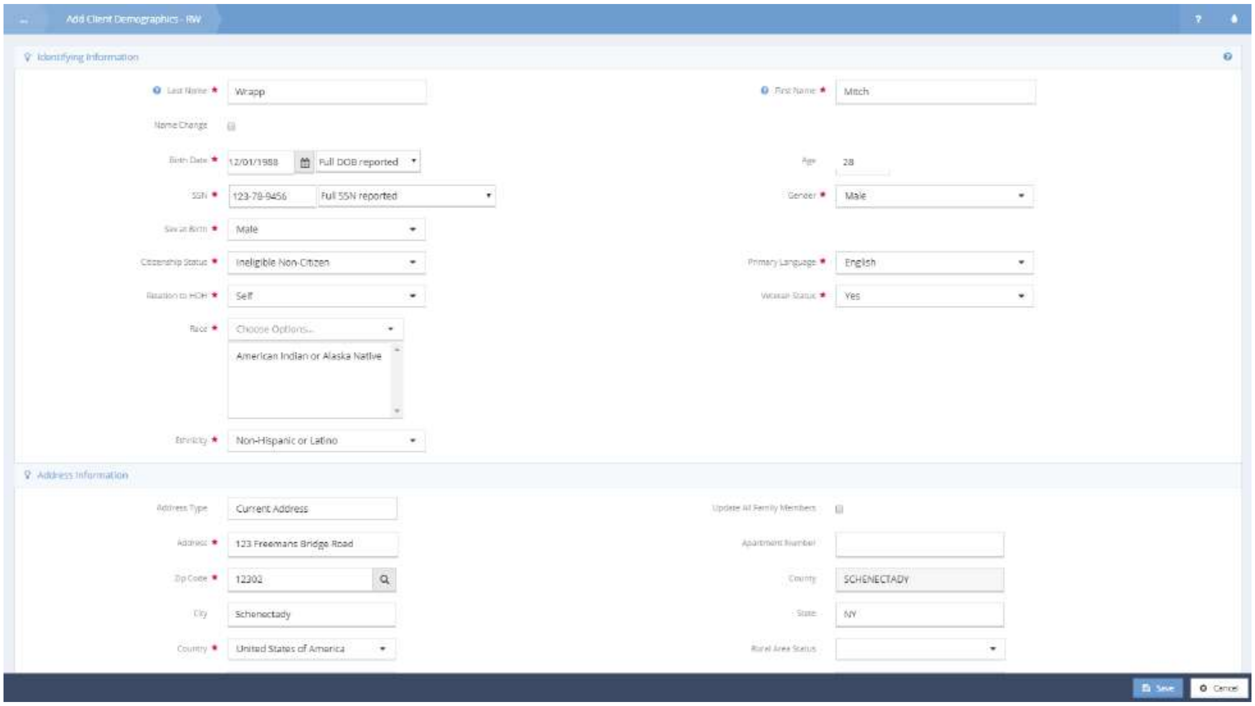


Under the Case Management tab, select Health Management. A pop-up menu appears. Select Ryan White. The Ryan White Dashboard appears.



Select RW Demographics.

The Add Client Demographics – RW form appears.



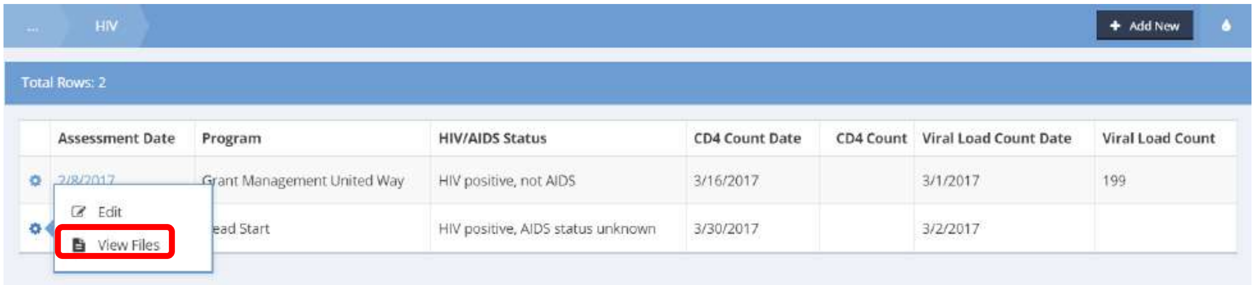
Many fields will automatically populate. This form is essentially identical to the Client Demographics form. In this setting, it is being used to collect domographics information for programs funded by Ryan White. Click the Save button to save and close the form.

View Files

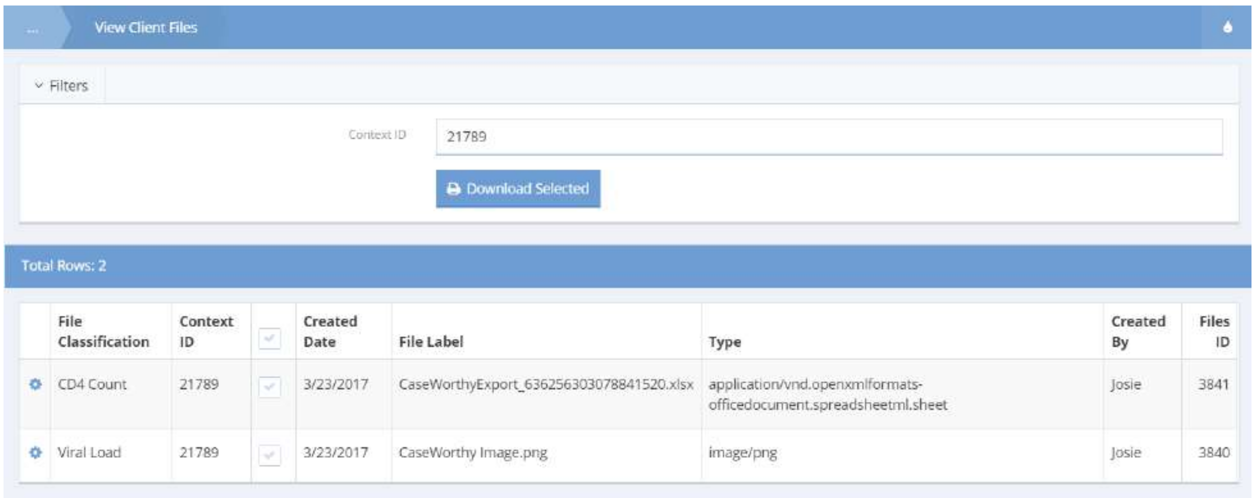
Objective: View files linked to the Ryan White Assessment.

From the Ryan White Dashboard, select the icon labeled RW Assessment.

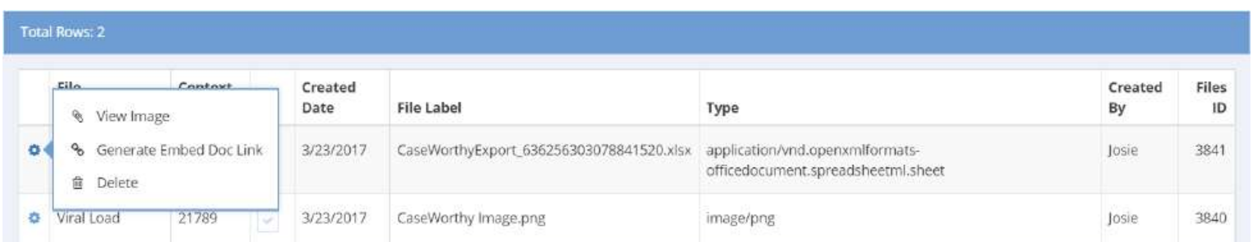
The HIV form appears. Click the action gear icon next to any assessment date and select View Files from the pop-up menu that appears.



The View Client Files form appears displaying any files that have been created.



Click on the icon to select a file for downloading. Click the button to download all selected files.



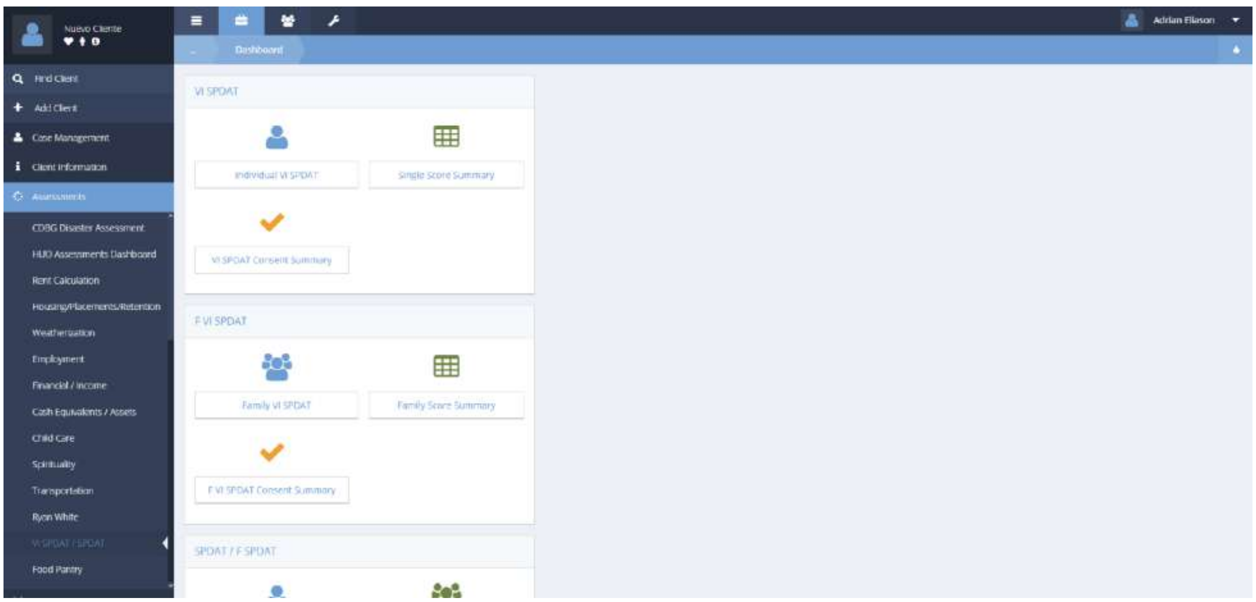
Click on theaction gear icon to view a pop-up menu with additional options. Select View Image, to view the image. Select Generate Embed Doc Link to create a link to the file.

VI SPDAT and SPDAT

VI SPDAT

Objective: Provides easily accessible prompt questions and assessment forms for VI SPDAT assessments for individuals and families. The assessment workflow is accessed either through the VI SPDAT dashboard or from the Add Client menu.

Navigation: Case Management>Assessments>VI SPDAT



From the VI SPDAT Dashboard, select the desired functionality; individual or family, create or review by clicking on the appropriate menu icon.

SPDAT

Objective: VI SPDAT Enhancements for 2017

Navigation: Case Management>Assessments>VI SPDAT and SPDAT

The following are new forms to display a summary of and capture the new VI SPDAT and SPDAT assessments for Family, Single Adults, and Youth.

Click on the Family SPDAT V. 2.01 icon. The Family SPDAT V. 2.01 Summary form displays.
Family SPDAT V. 2.01 (9364)

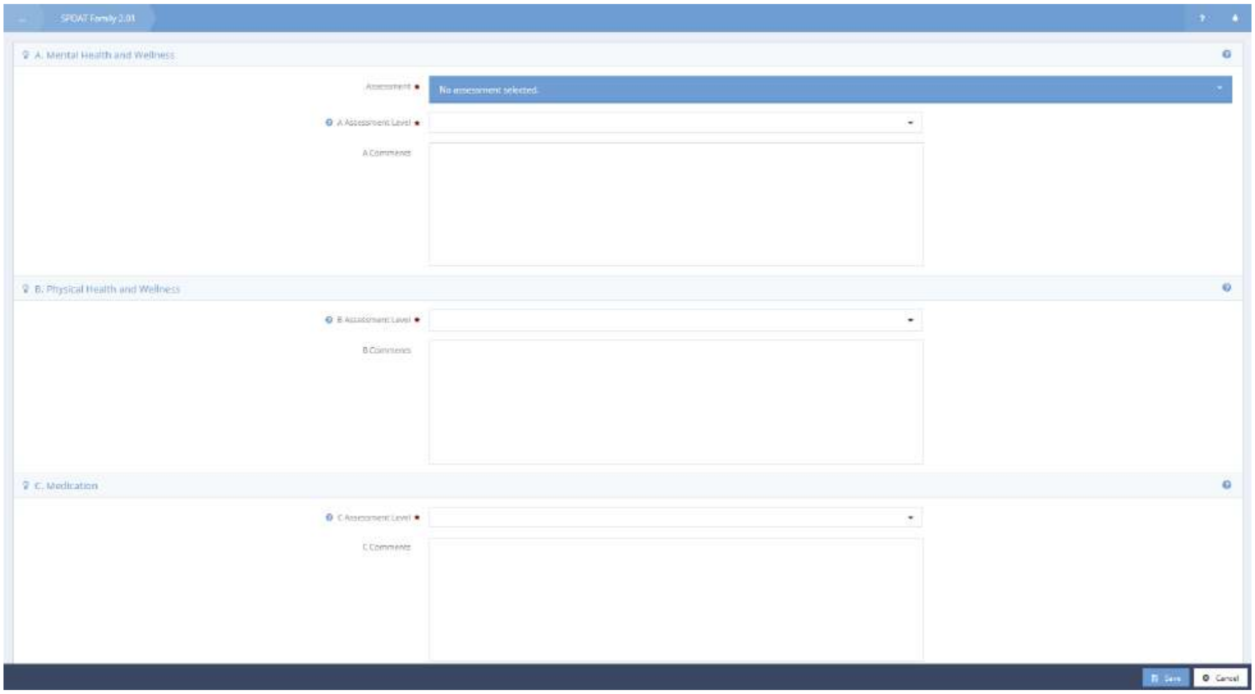

Family SPDAT V. 2.01 Summary

Add New

Total Score	Type	Mental Health	Physical Wellness	Medication	Substance Use	Relationships	Abuse	Harm Risk	Risky Situations	Emergency Services	Legal	Tenancy	Money	Self Care	Daily Activity	Housing and Homelessness	Parental Engagement	Stability of Family Unit	Needs Of Children	Size Of Family	CPS or Family Court Involvement
39	Family	2	1	0	4	2	3	2	0	4	2	2	1	3	0	3	2	2	1	2	3

This form simply displays any previous assessments and the general score for each category within that assessment. Use the action gear icon to edit or delete the existing assessment. Use the Add New button to add a new assessment.

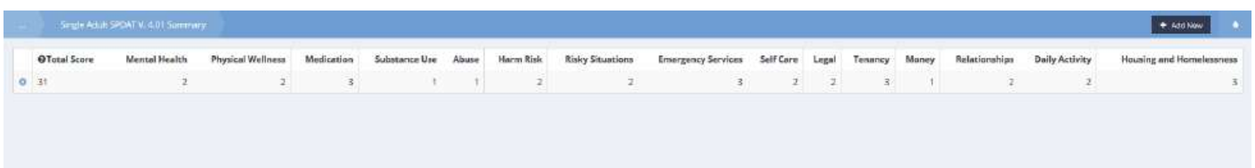
The SPDAT Family 2.01 form displays.

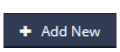


Select an assessment, an assessment level (use the help text) for each section, and any comments as necessary. Save to continue. Once the assessment has been completed it appears on the summary form.

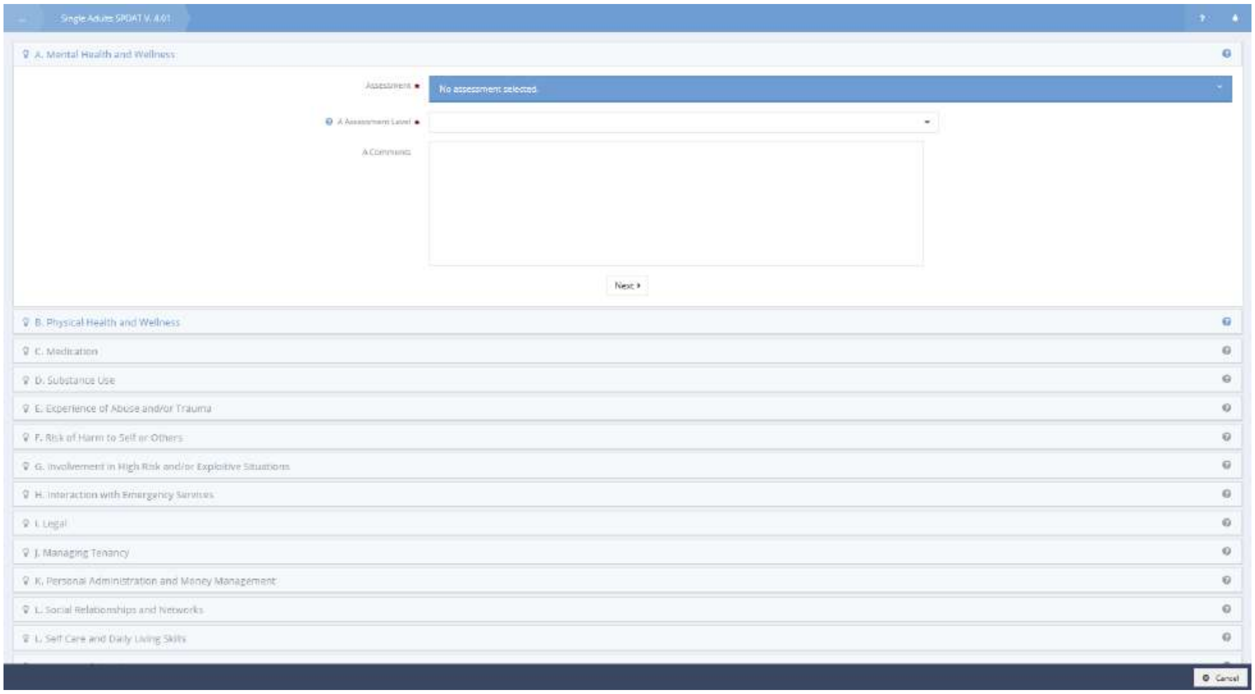
The same functionality exists for the Single Adults and Youth SPDAT.

The Single Adult SPDAT V. 4.01 Summary form displays.



Click on the  button.

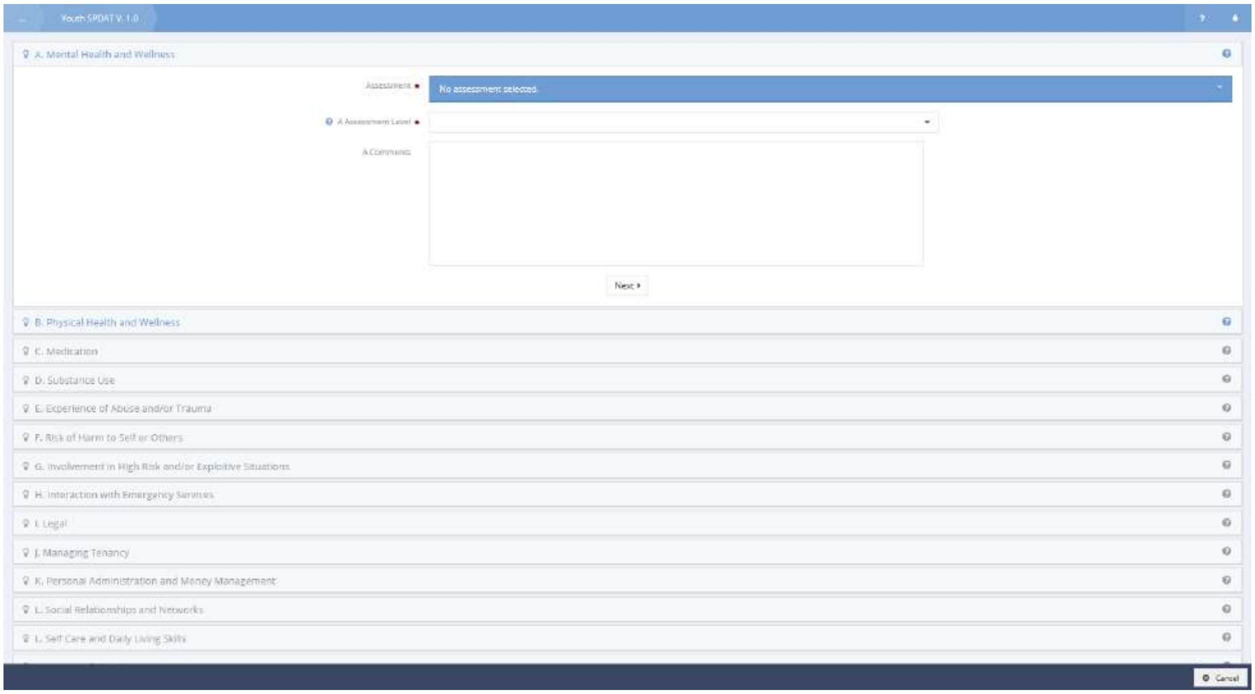
The Single Adults SPDAT V. 4.01 displays.



The Youth SPDAT V. 1.0 Summary form displays.

Click on the **+ Add New** button.

The Youth SPDAT V. 1.0 form displays.

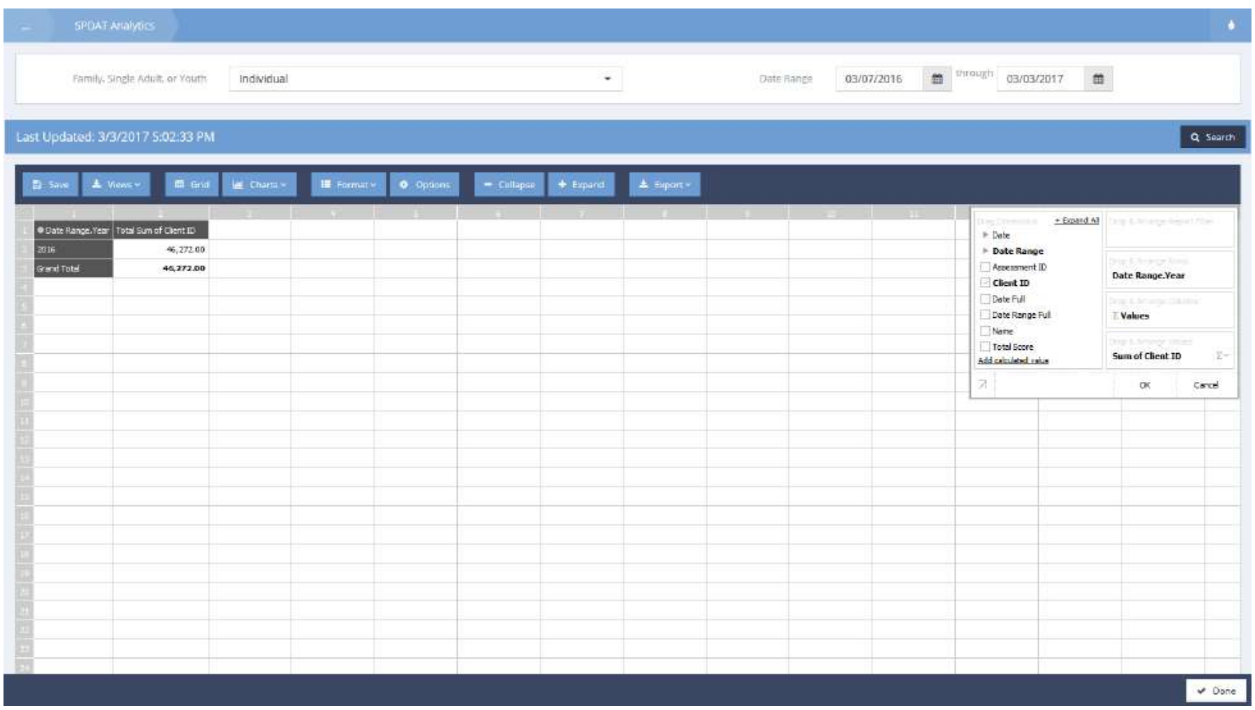


Administration

Navigation: Administration>Reporting>Compliance Reports>SPDAT

The SPDAT Analytics form displays.

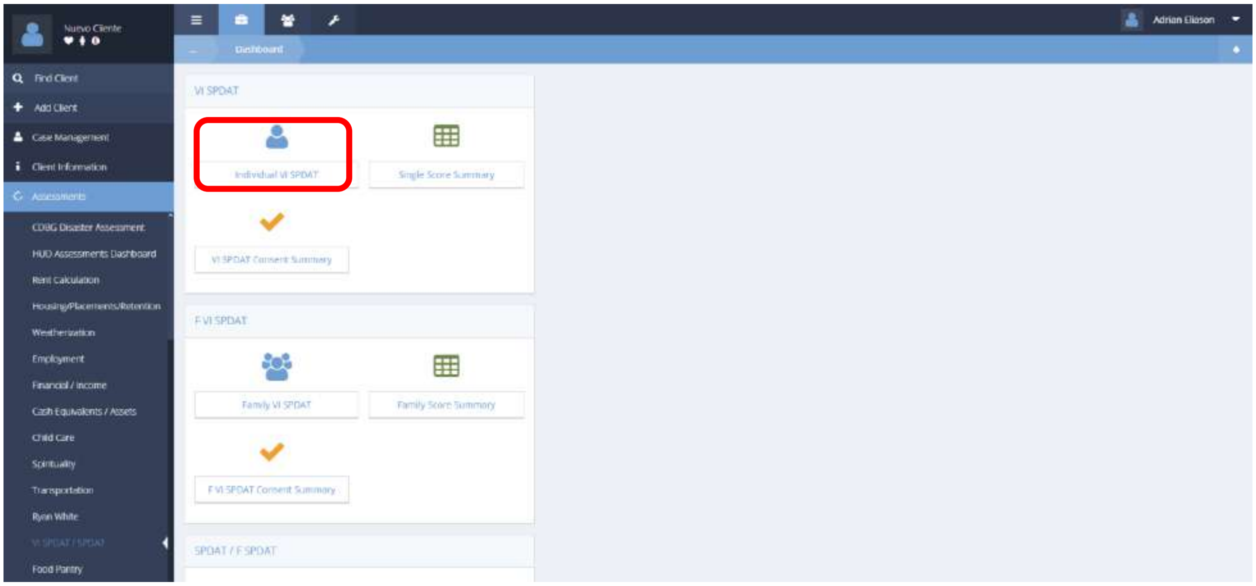
Select the desired SPDAT to view a report on: Individual, Family, or Youth and select a date range. Click the Search button to view results.



A pivot form displays with the desired information. Use the pivot functionality to view the results as desired.

Individual VI SPDAT

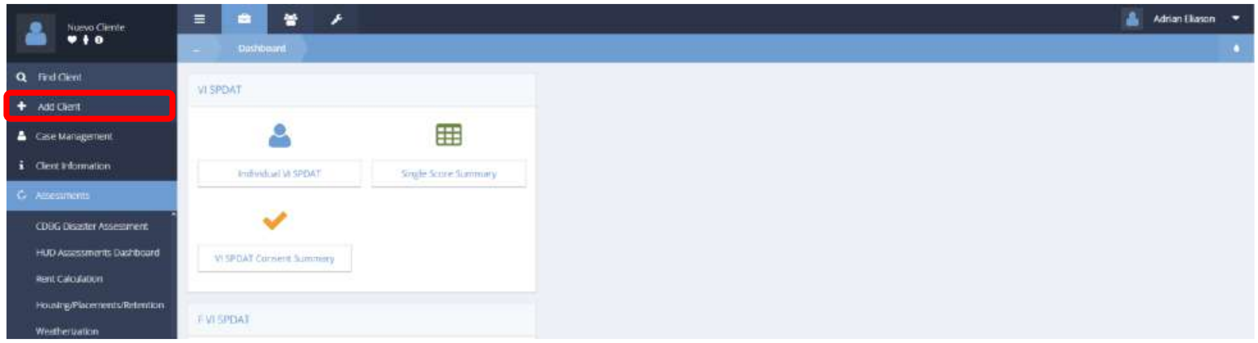
To create a new VI SPDAT assessment, either proceed from the dashboard by clicking on the Individual VI SPDAT icon or click on the + Add Client button in the upper portion of the taskbar on the left.



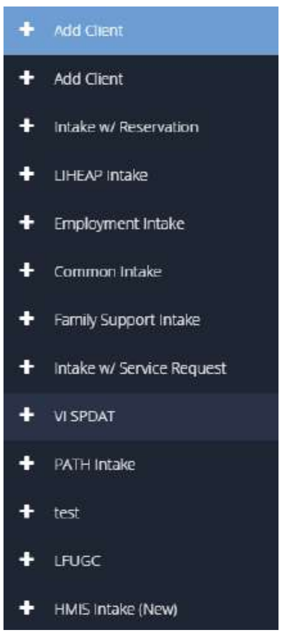
If selecting the Individual VI SPDAT icon, the VI SPDAT Summary form displays.

Click on the + Add New button.

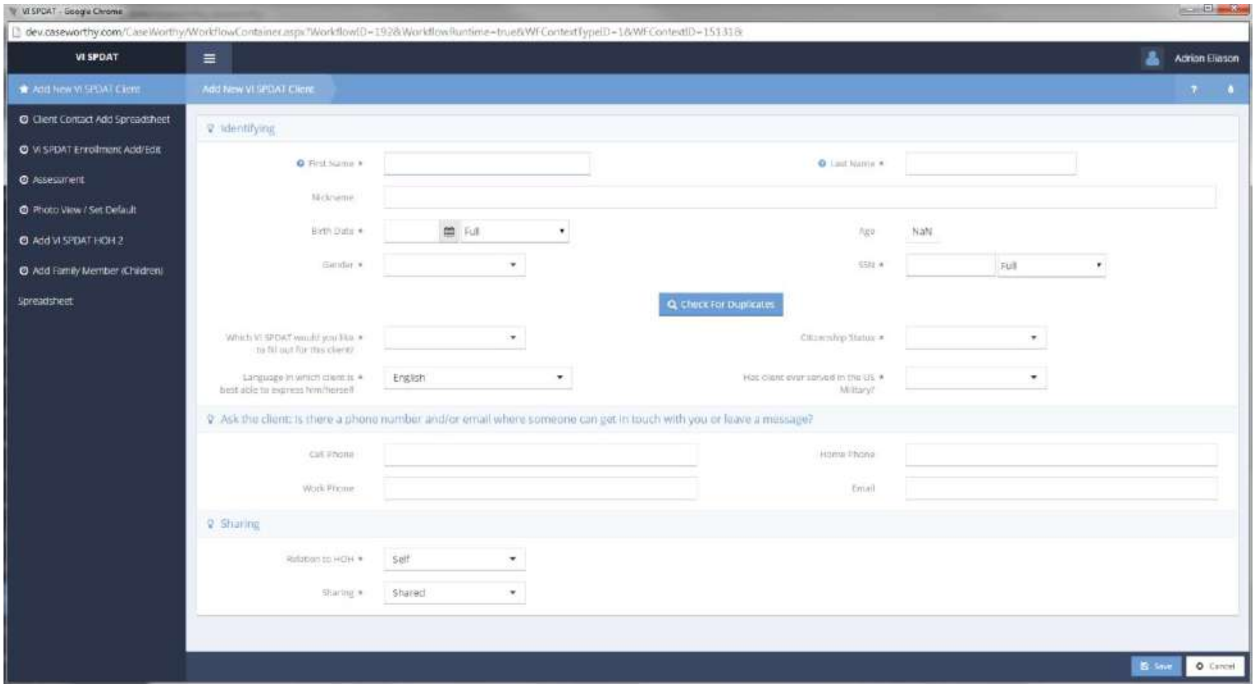
If initiating the assessment by the + Add Client method, click on the + Add Client button.



From the drop-down menu, select VI SPDAT.

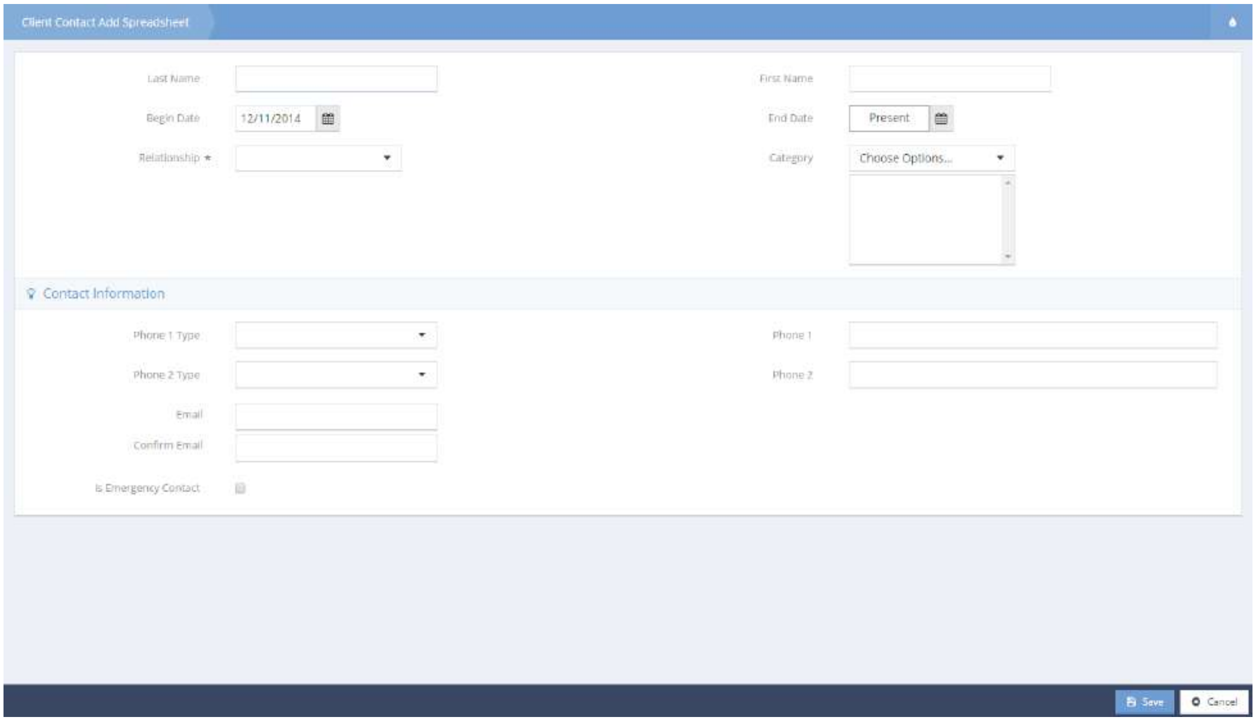


Irrespective of initialization method, the VI SPDAT workflow displays.

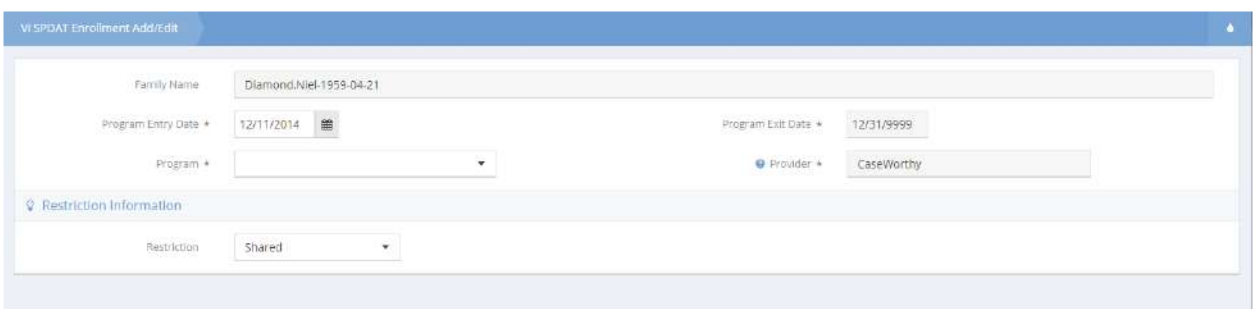


Enter the first section of identifying information including name, date of birth, social security number and gender. Click on the Check For Duplicates button. The space expands, listing any existing clients that may be a close match to the entered information. See if the new client is already in the system. If so, click on the name presented in the list. If not, click on the This is a new client button. Select the desired VI SPDAT (Family or Individual) from the drop-down list. Select values from the drop-down lists for language, citizenship and military service. Enter any contact information and select a value from the drop-down lists for relationship to head of household and information sharing. Click on the Save button.

The next step in the workflow appears.

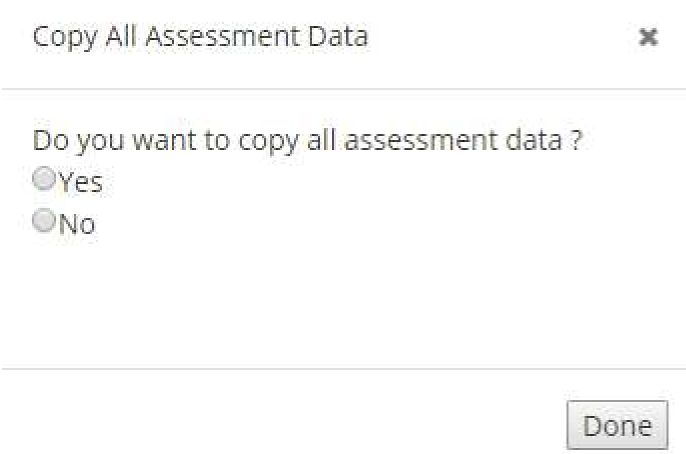


To add a client contact, select their relationship to the client from the drop-down list and enter any available contact information. Click the Save button to move to the next step in the work flow.



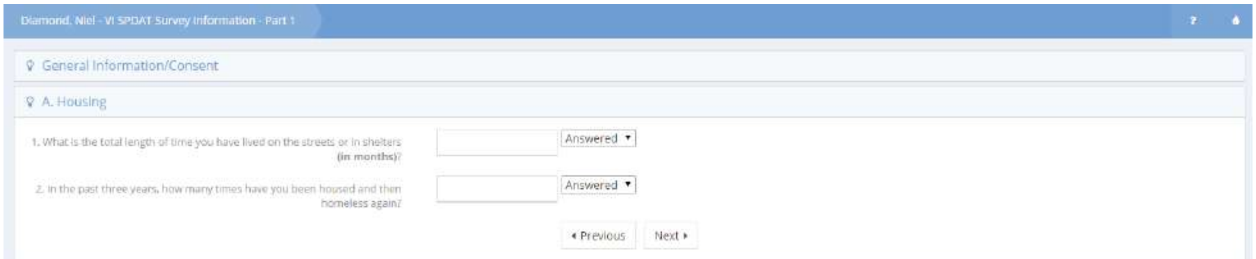
Edit the program entry date and restriction values if desired and select the desired program from the drop-down list. Click on the Save button.

The next section of the work flow appears with a superimposed window offering to copy a previous assessment. Selecting "Yes" pulls current client data from an earlier assessment into the current assessment. That data can then be reviewed and altered if desired during the assessment process. Select "Yes" or "No" and click on the Done button.

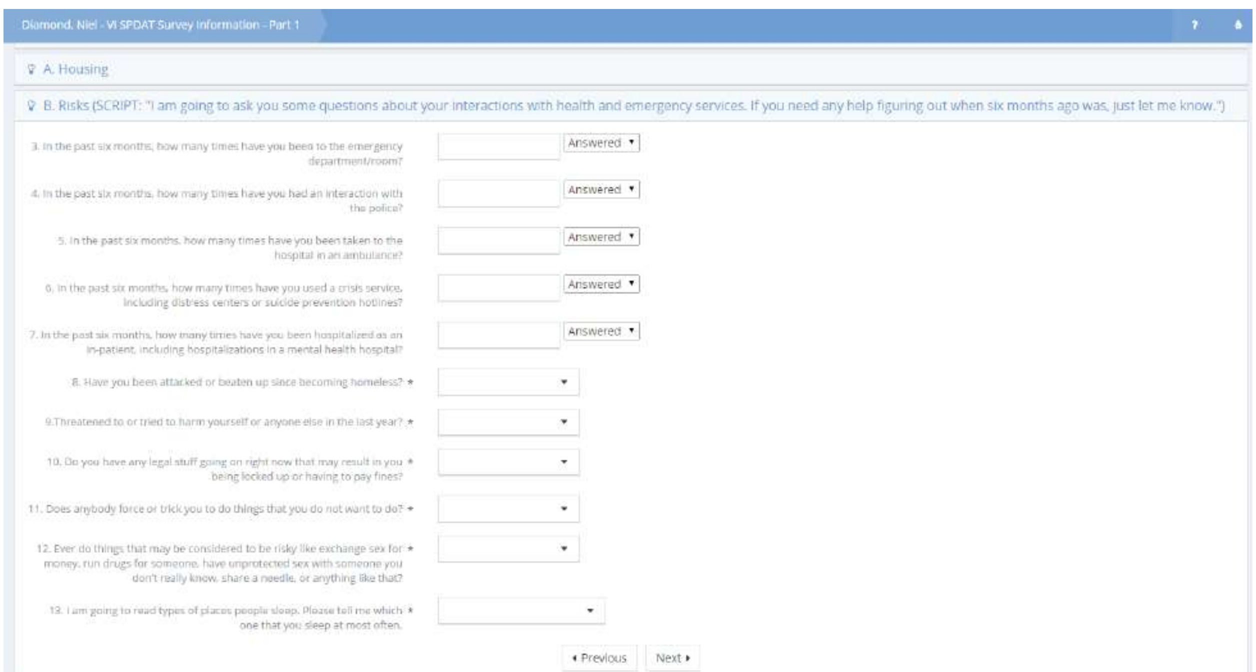


Enter the Interviewer name, agency location…edit the date and time if desired…select the client response for consent. Click on the Next ▸ button. The General Information/Consent step collapses and scrolls to the top of the form.

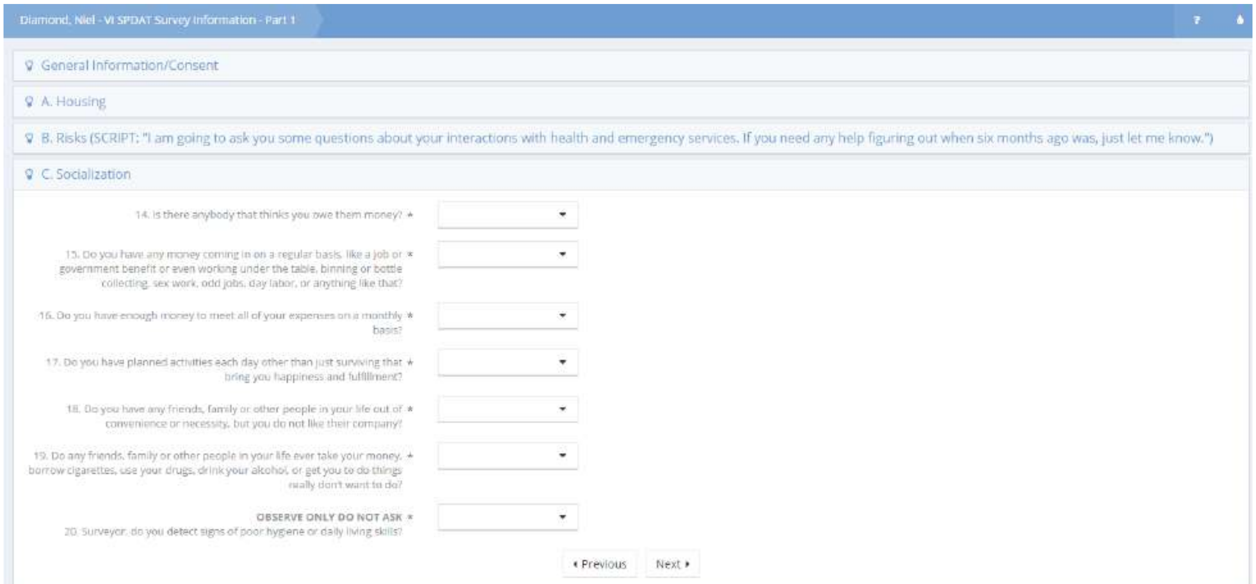
The Housing section of the form expands.



There are navigation buttons, Previous and Next at the bottom of each section of this assessment. Within the assessment, there are open ended questions and questions with drop-down lists from which to select a response. Open ended questions have a related field that indicates whether the client answered the question or refused. These fields are editable and default to “Answered”. Read the questions to the client and enter their responses. Click on the Next button to continue to the next step. The assessment questions relating to risk appear.

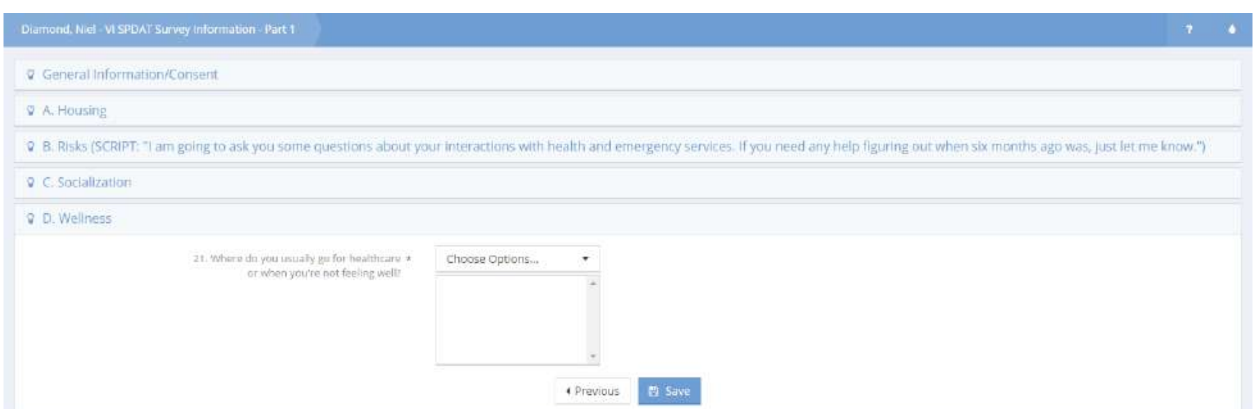


Ask the client the questions, enter their responses and click the Next ▸ button to continue. The socialization related questions appear.



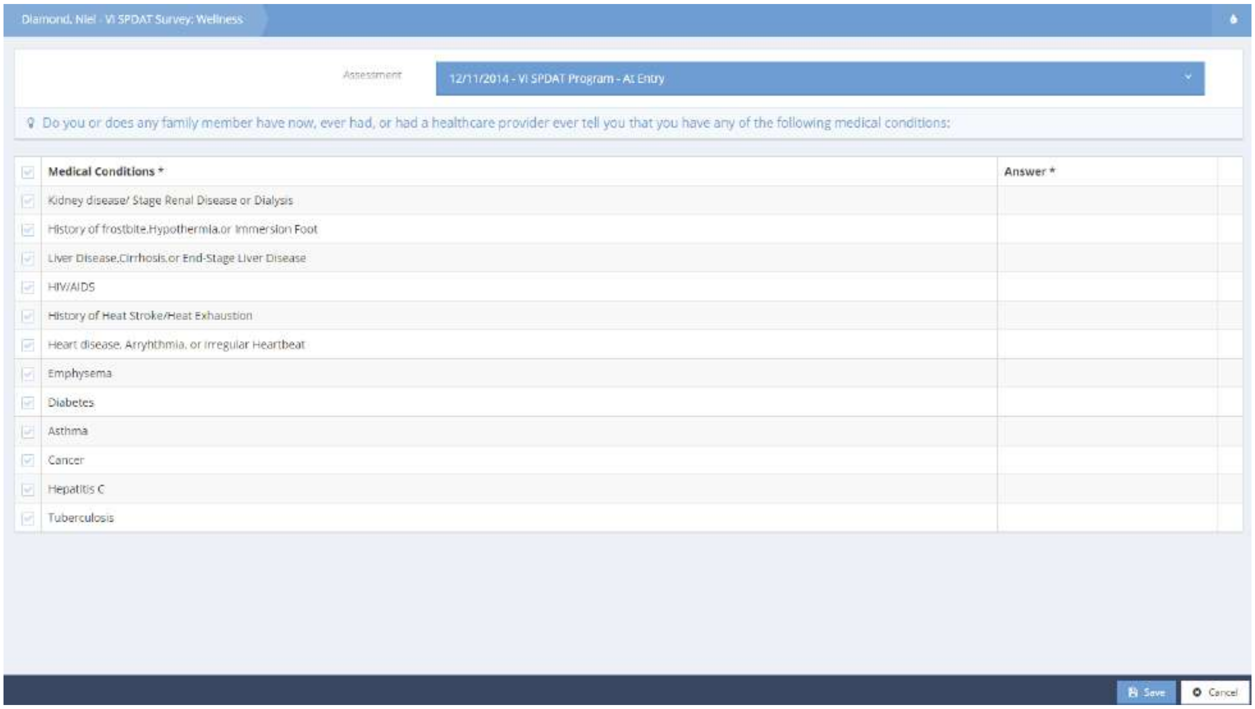
Some questions in the assessment are not for the client, rather are for the interviewer to provide their professional opinion regarding specific aspects of the client's situation. These questions begin with the words "OBSERVE ONLY DO NOT ASK". Read these questions silently and select a response from the drop-down list.

Ask the client the questions, enter their responses and click the Next ▸ button to continue. The wellness related questions appear.



Ask the client the question, enter the response and click the 

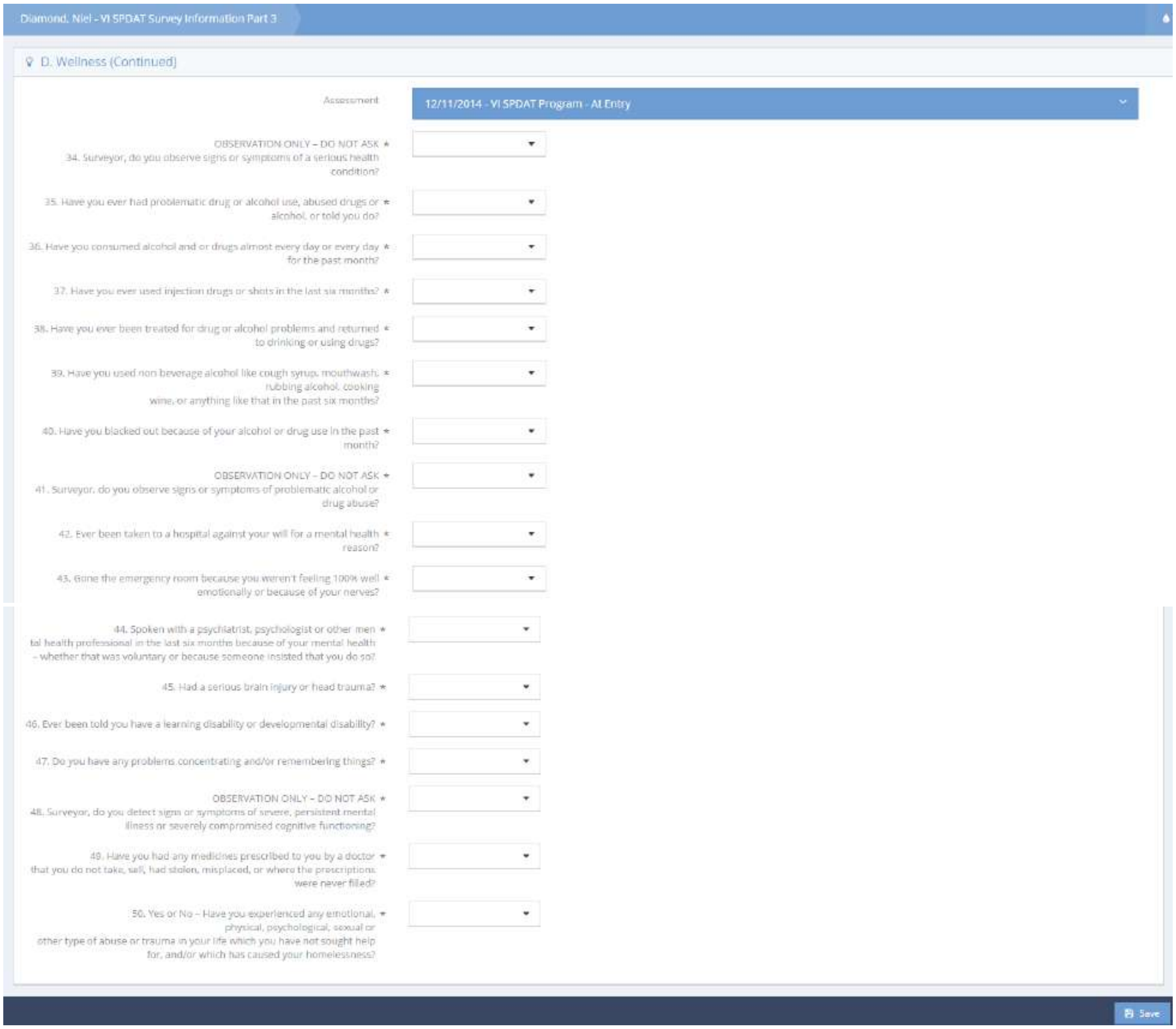
button to continue. The next step in the assessment appears.



Click the checkbox for each condition and if the client indicates having the condition, change the answer to "Yes." Click on the 

button.

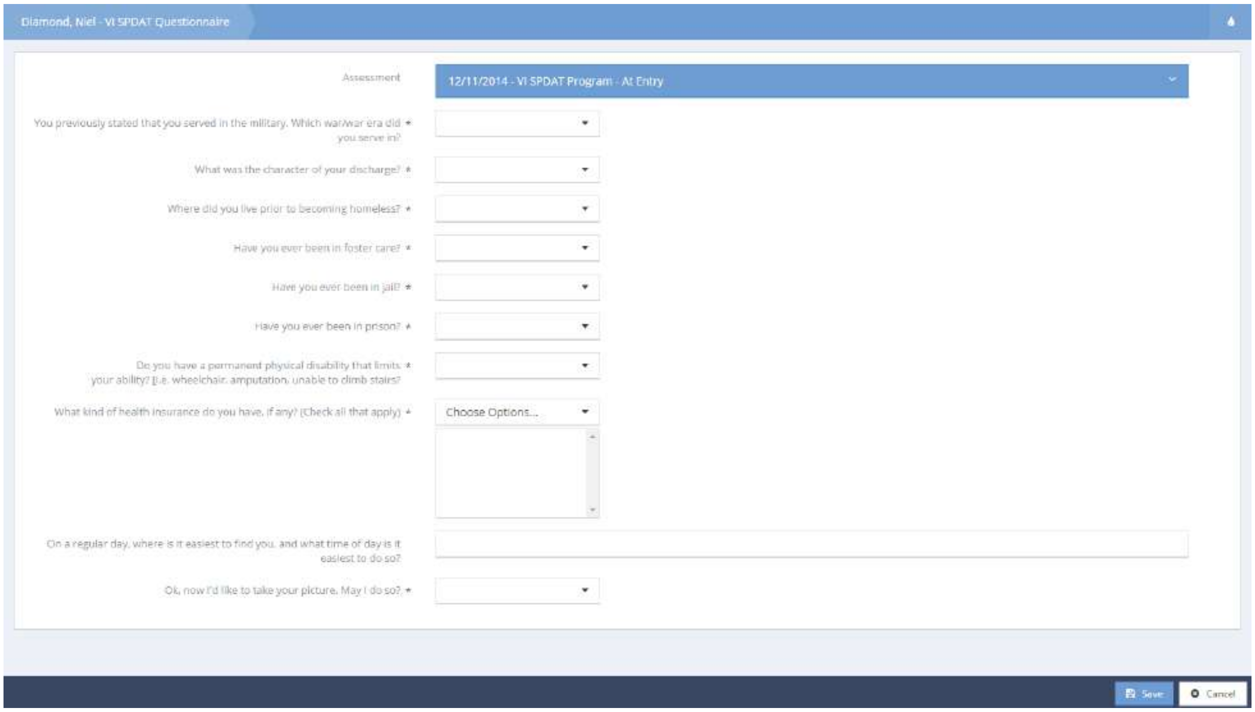
The next page of questions appears.



Ask the client the questions, enter the responses and click the 

button to continue.

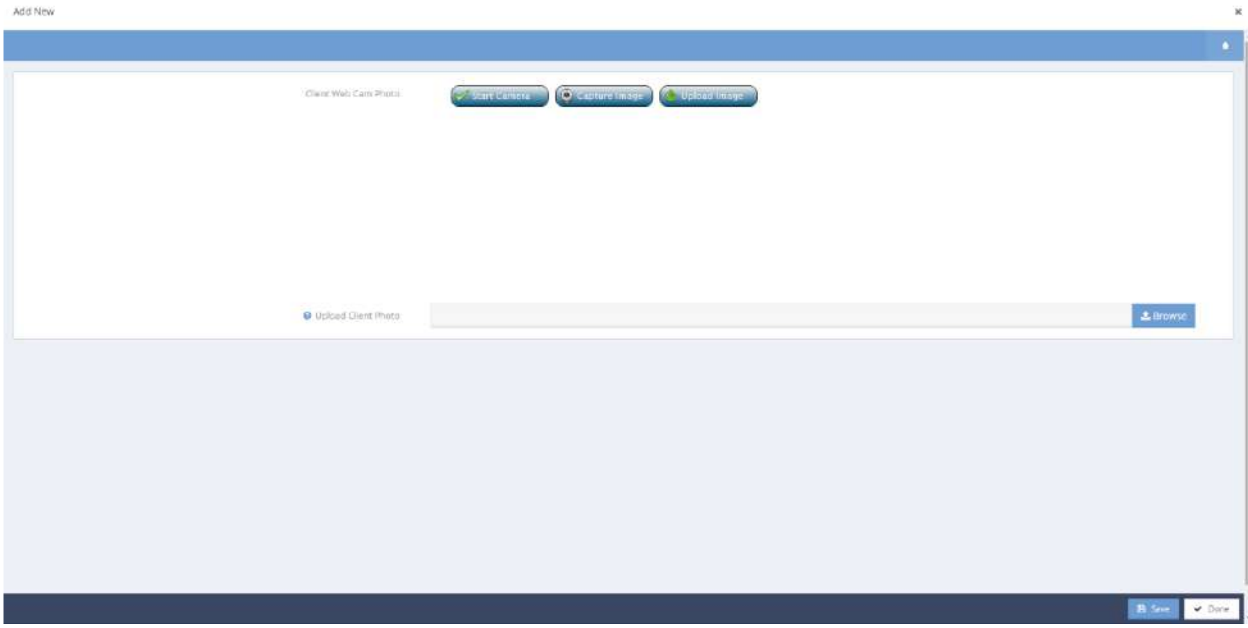
The last page of questions appears.



Ask the client the questions, enter their responses and click the Save button to continue. The first two questions related to military service only display if the client responded in the affirmative to an earlier question regarding military service. The last question on the form is a request to take the client's picture. If they agree to have their picture taken, the following form appears when the interviewer saves the form.

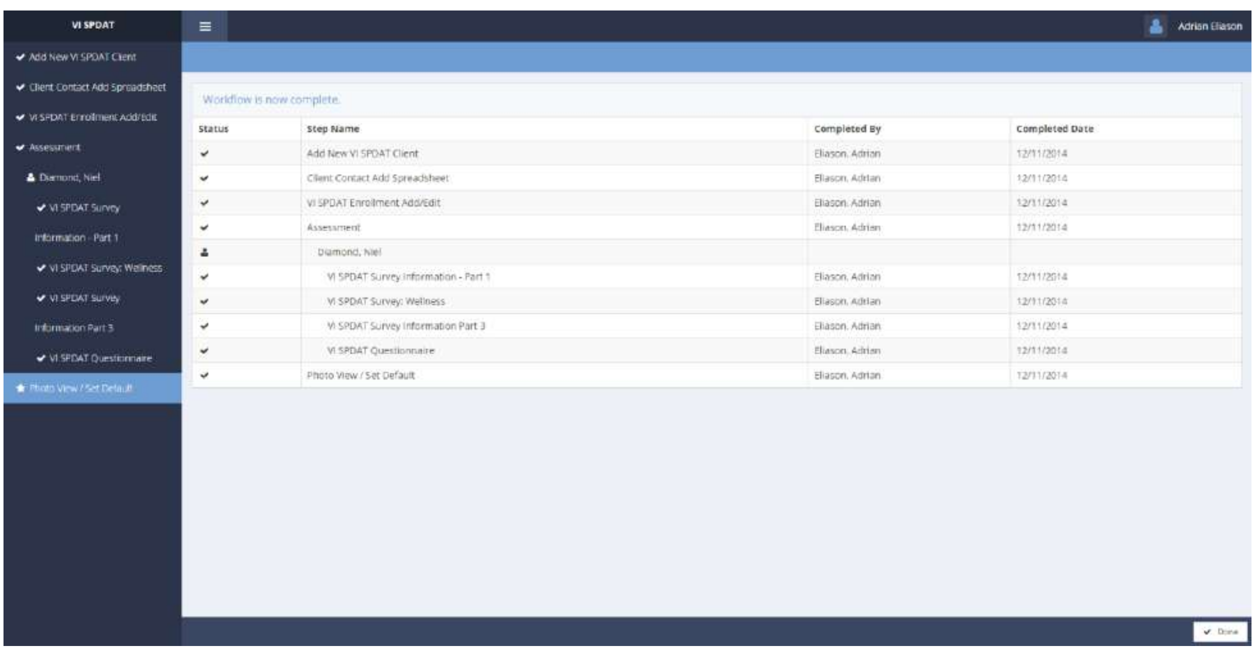
Click on the + Add New button.

The Add New form displays.



Start the camera, capture the image and upload the image. Alternatively, browse and select an image to upload. Click on the Save button. Verify that the image uploaded and click on the Done button.

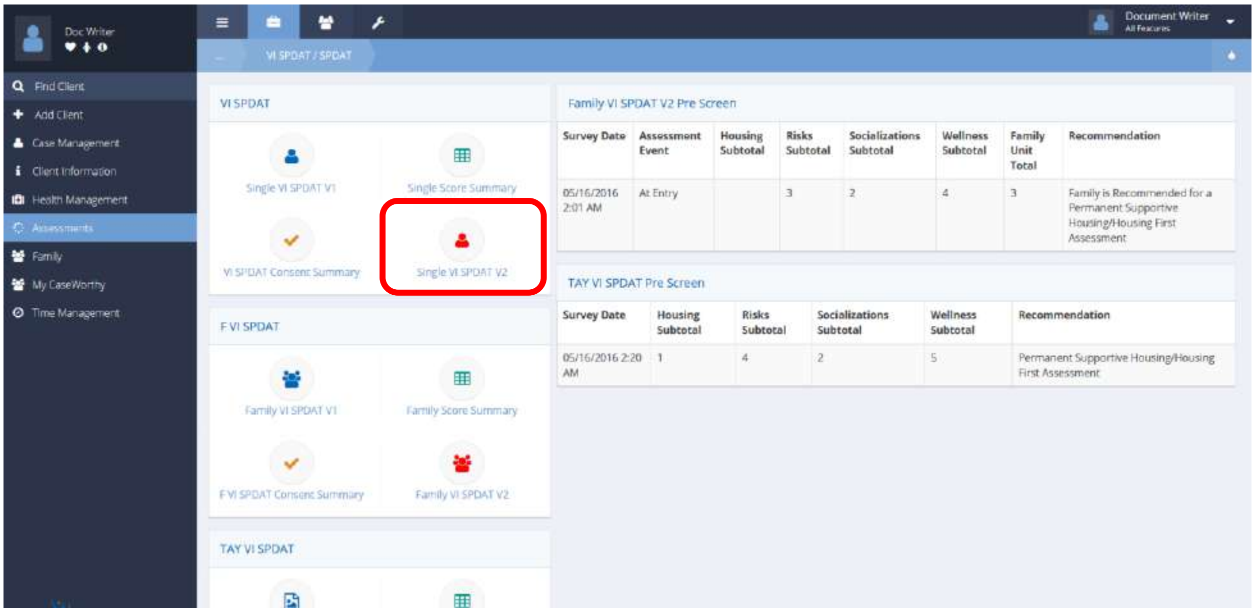
The workflow is now complete. Verify that the assessment steps are all complete and click on the Done button.



Single VI SPDAT V2

Objective: Add and print assessments and capture client photo.

Navigation: Case Management>Assessments>VI SPDAT and SPDAT

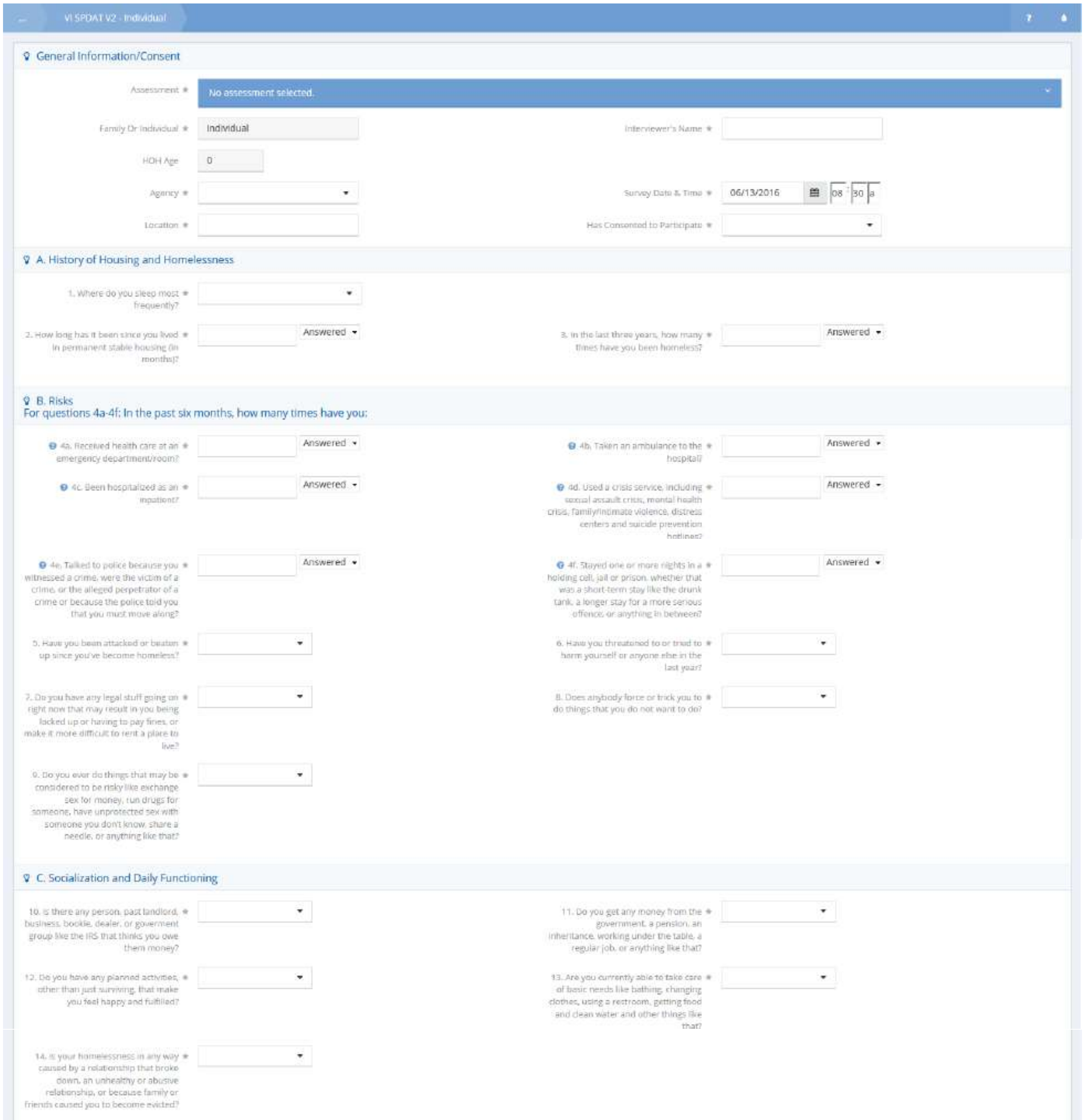


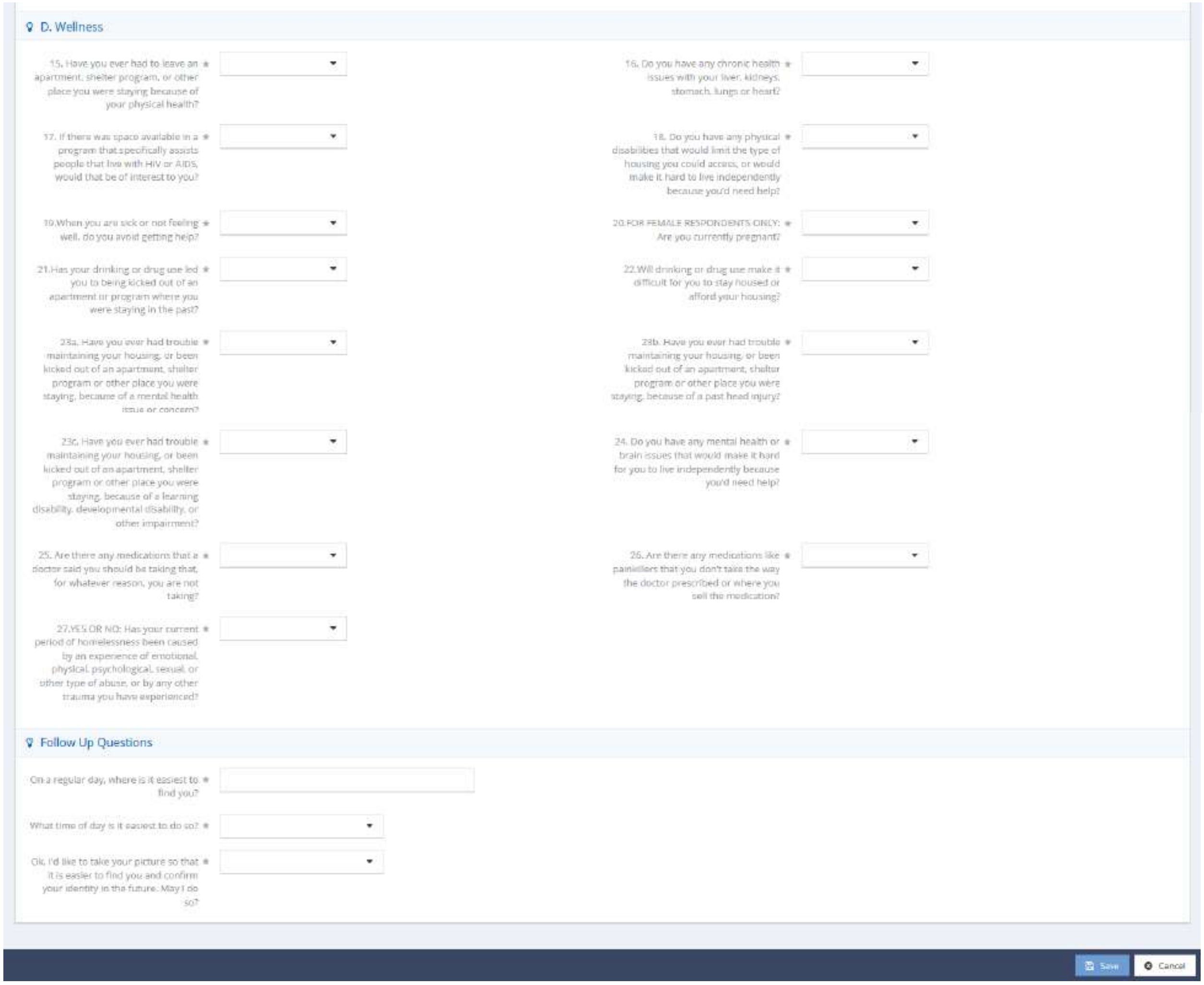
Select Single VI SPDAT V2 of the VI SPDAT portion of VI SPDAT and SPDAT dashboard.

The VI SPDAT Version 2 Summary form displays.

To edit an existing assessment, click the action gear icon associated with the desired assessment and select Edit from the menu options. To add a new assessment, click the Add New button.

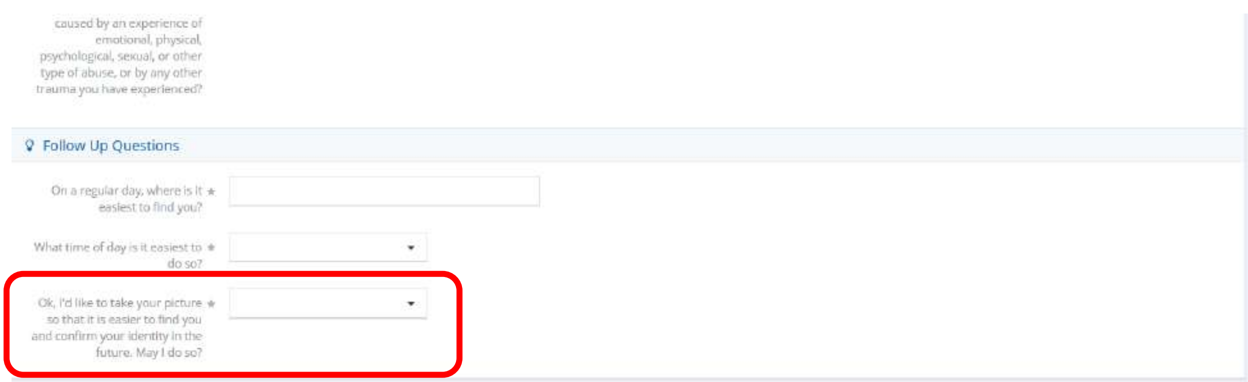
The VI SPDAT V2 – Individual form displays in either case.



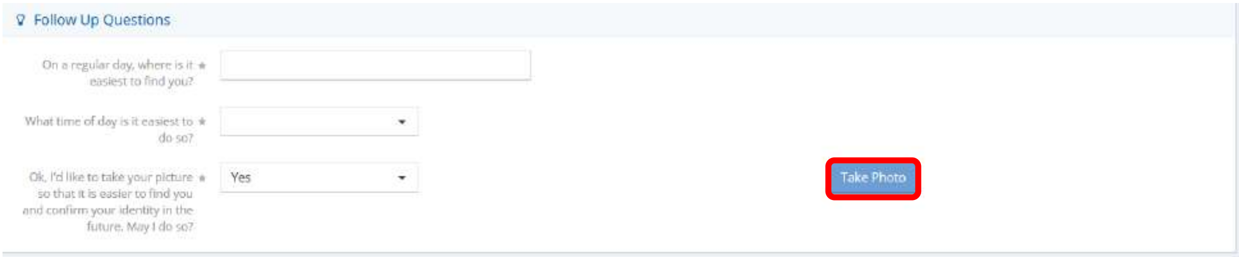


Enter information into all fields, as they are all required. If the participant has not consented to participate, sections A, B, C, and D collapse and are no longer accessible.

To capture a client photo for the VI SPDAT V2 Assessment select “Yes” when prompted to add a picture under the Follow Up Questions portion of the form.

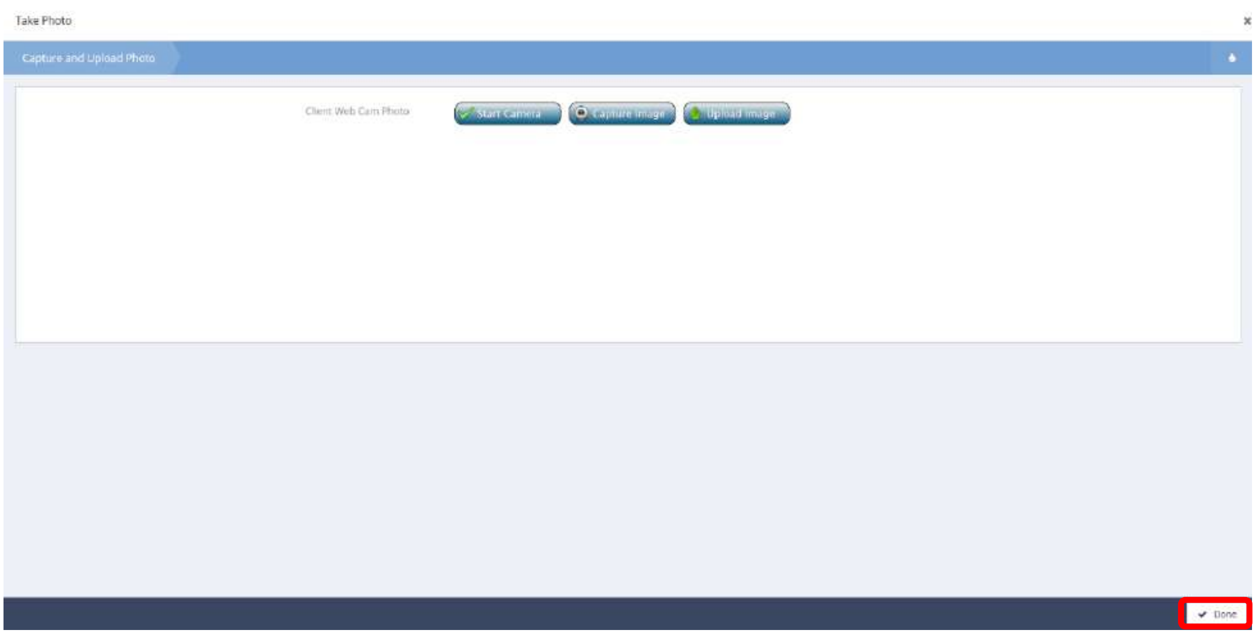


A Take Photo button appears.



Click the Take Photo button.

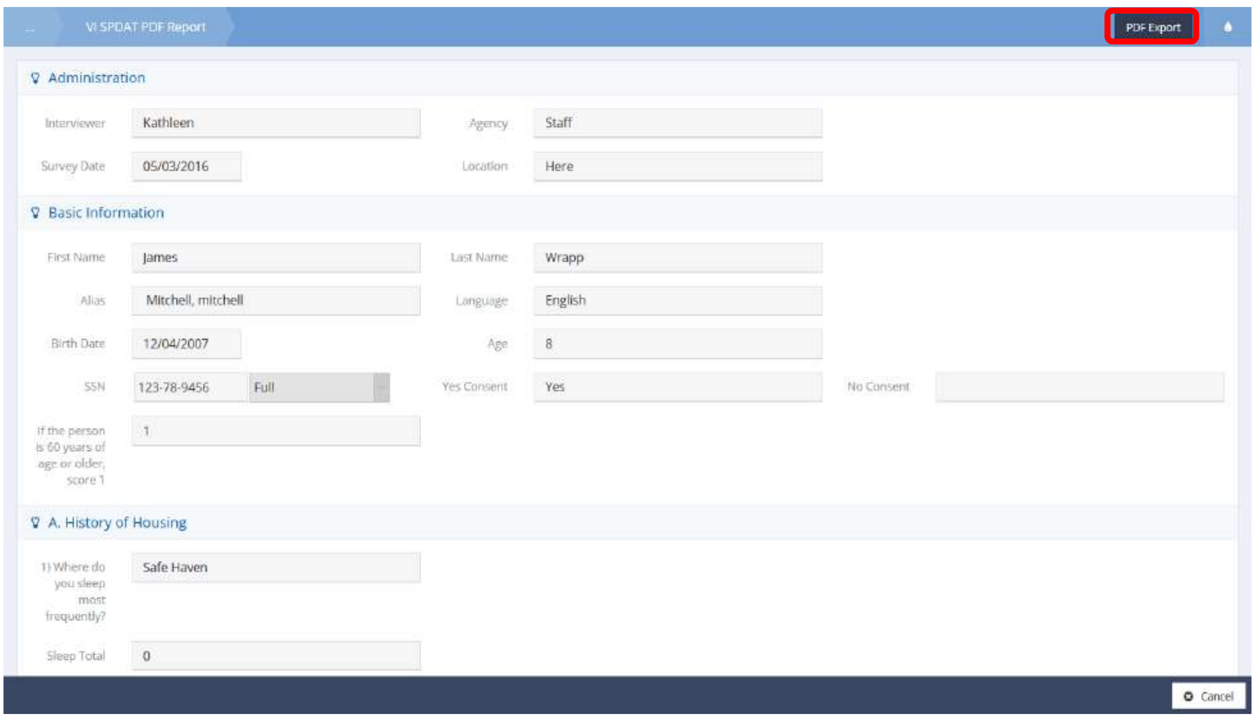
The Capture and Upload Photo form displays.



Follow the steps as outlined in the form. Click the ✔ Done button when finished.

To print an existing assessment from the summary form, select the action gear icon associated with the desired assessment. Select Print from the menu options.

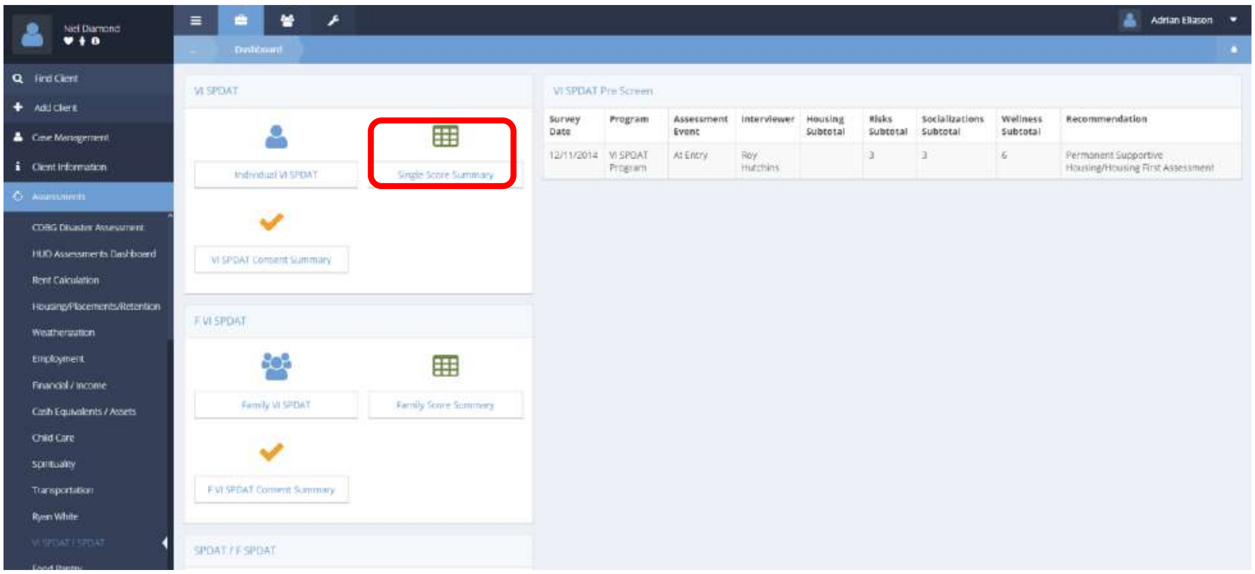
The VI SPDAT PDF Report form displays.



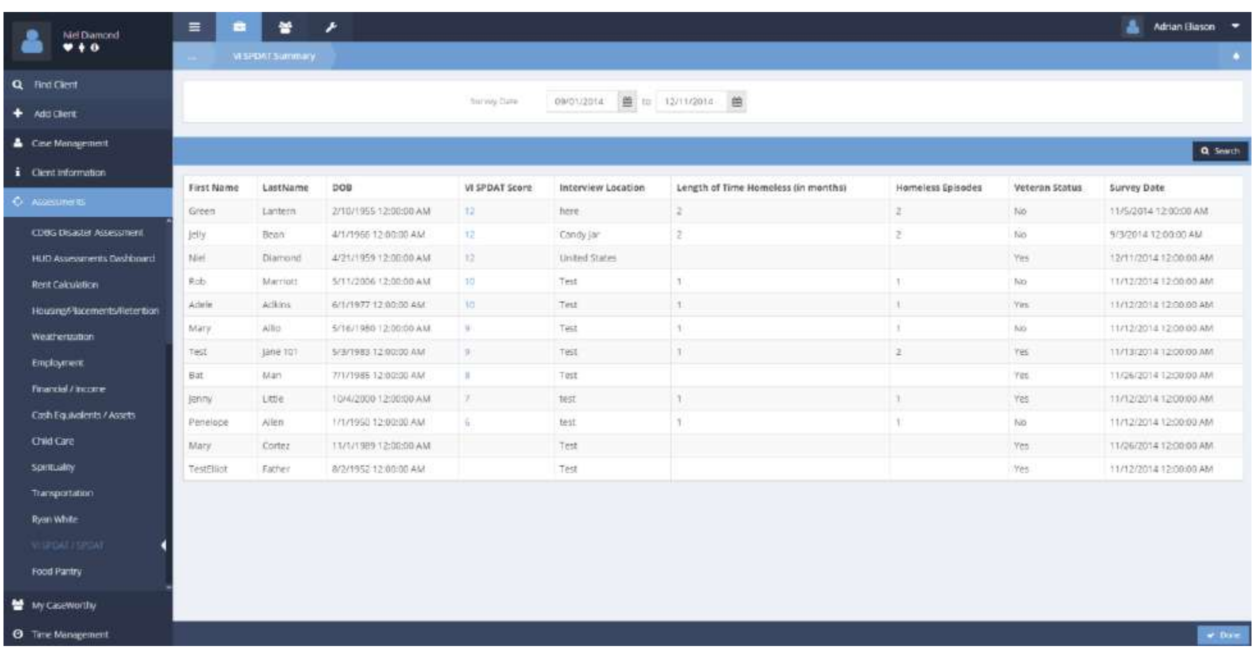
Select the PDF Export button. The report downloads. Print according to any appropriate computer settings.

Individual VI SPDAT Score Summary

The Individual VI SPDAT Score Summary form is accessed by clicking on the Single Score Summary icon on the VI SPDAT menu of the VI SPDAT Dashboard.

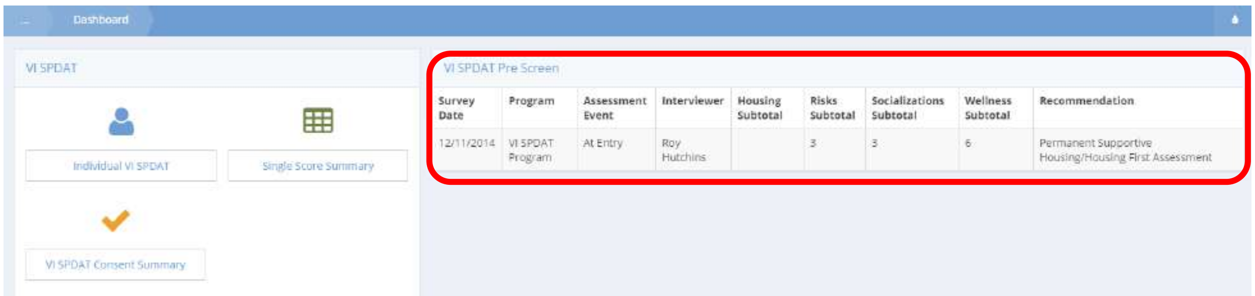


The form that displays presents all individual VI SPDAT scores for the selected date range. This form is not filtered by current client.



VI-SPDAT Prescreen for Single Adults Report

Click on any data line in the tabular VI SPDAT Pre Screen window on the VI SPDAT Dashboard.



The VI SPDAT Summary form appears. Click on the action gear icon associated with the desired assessment. Select "VI SPDAT Single" from the pop up menu that appears.

The VI-SPDAT Prescreen for Single Adults Report opens in a new window. This report is exportable, printable and viewable.

An example of the first page appears below.

VI-SPDAT Prescreen for Single Adults

Run By aeliason on 12/11/2014 12:00:56 PM

General Information / Consent	
Interviewer's Name: Roy Hutchins	**Agency:** Staff
Date: 12/11/2014 12:00 AM	**Location:** United States
In what language do you feel best able to express yourself? English	
Name: Niel Diamond	**Nickname:**
Date of Birth: 4/21/1959	**Has Consented to Participate:** Yes
If 60 years or older, then score 1.	
Pre-Screen General Information Subtotal	0

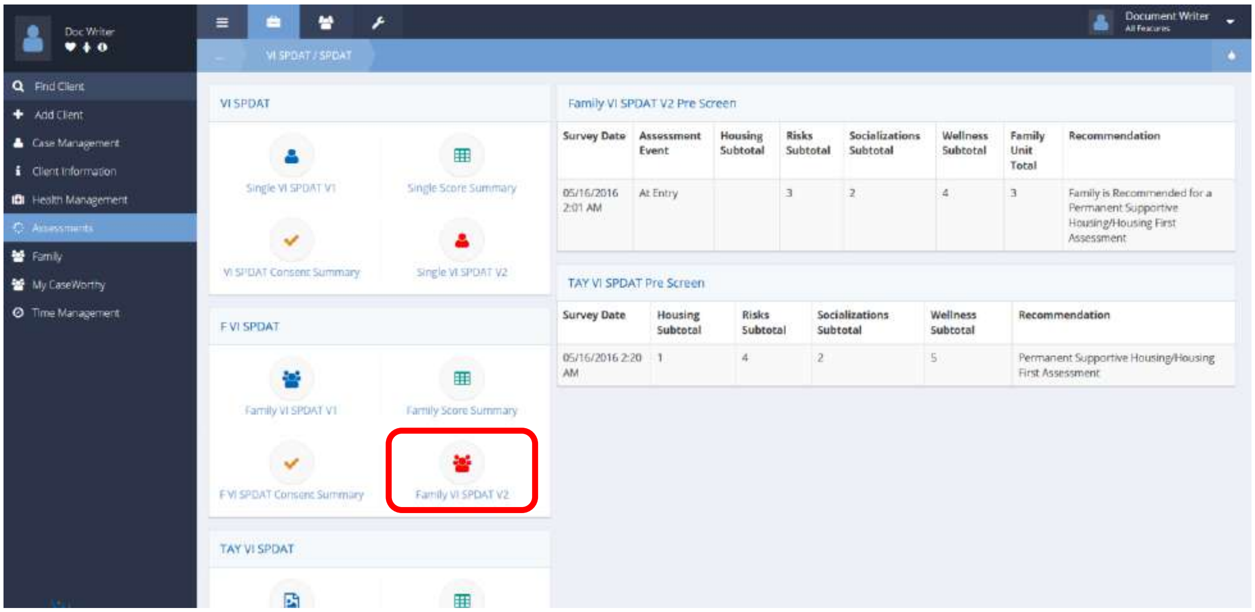
A. History of Housing & Homelessness	
If the person has experienced two or more cumulative years of homelessness, and/or 4+ episodes of homelessness, then score 1.	
1. What is the total length of time you have lived on the streets or in shelters?	Client Refused
2. In the past three years, how many times have you been housed and then homeless again?	Client Refused
Pre-Screen Housing & Homelessness Subtotal	0

B. Risks	
If the total number of interactions across questions 3, 4, 5, 6, and 7 is equal to or greater than 4, then score 1.	0

Family VI SPDAT V2

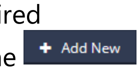
Objective: View, add, and print assessments.

Navigation: Case Management>Assessments>VI SPDAT and SPDAT

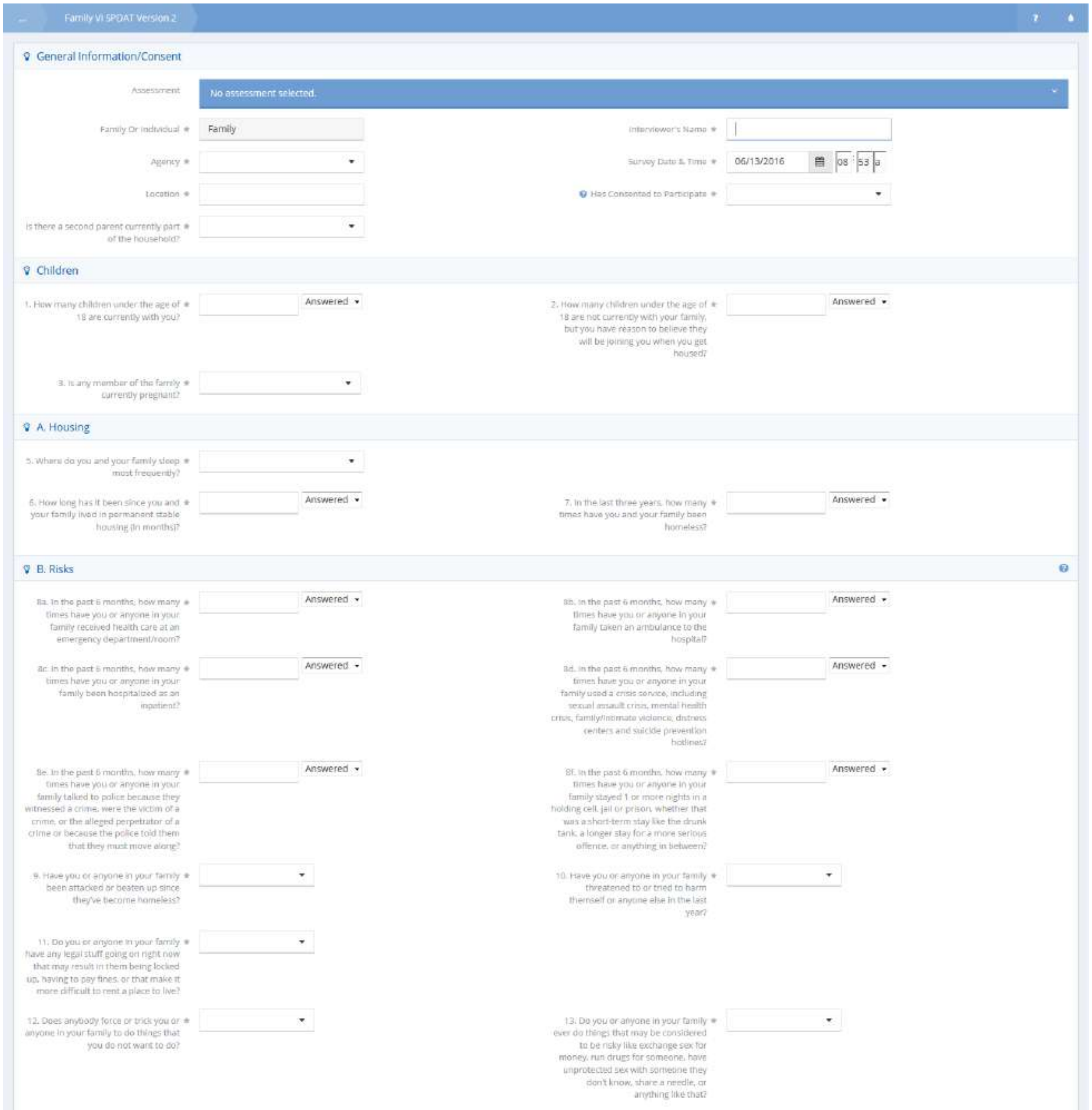


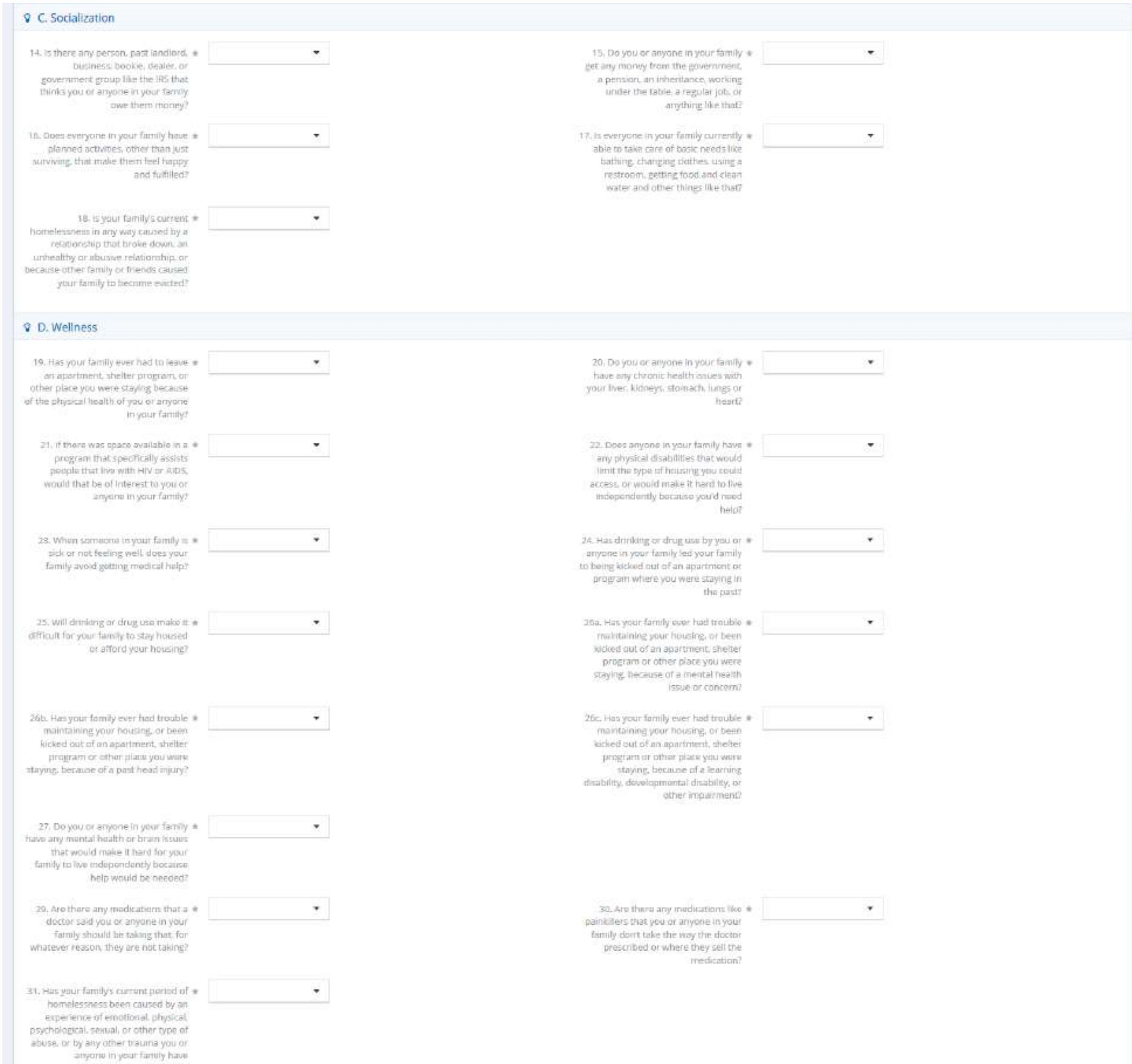
Select Family VI SPDAT V2 from the F VI SPDAT portion of the VI SPDAT and SPDAT dashboard.

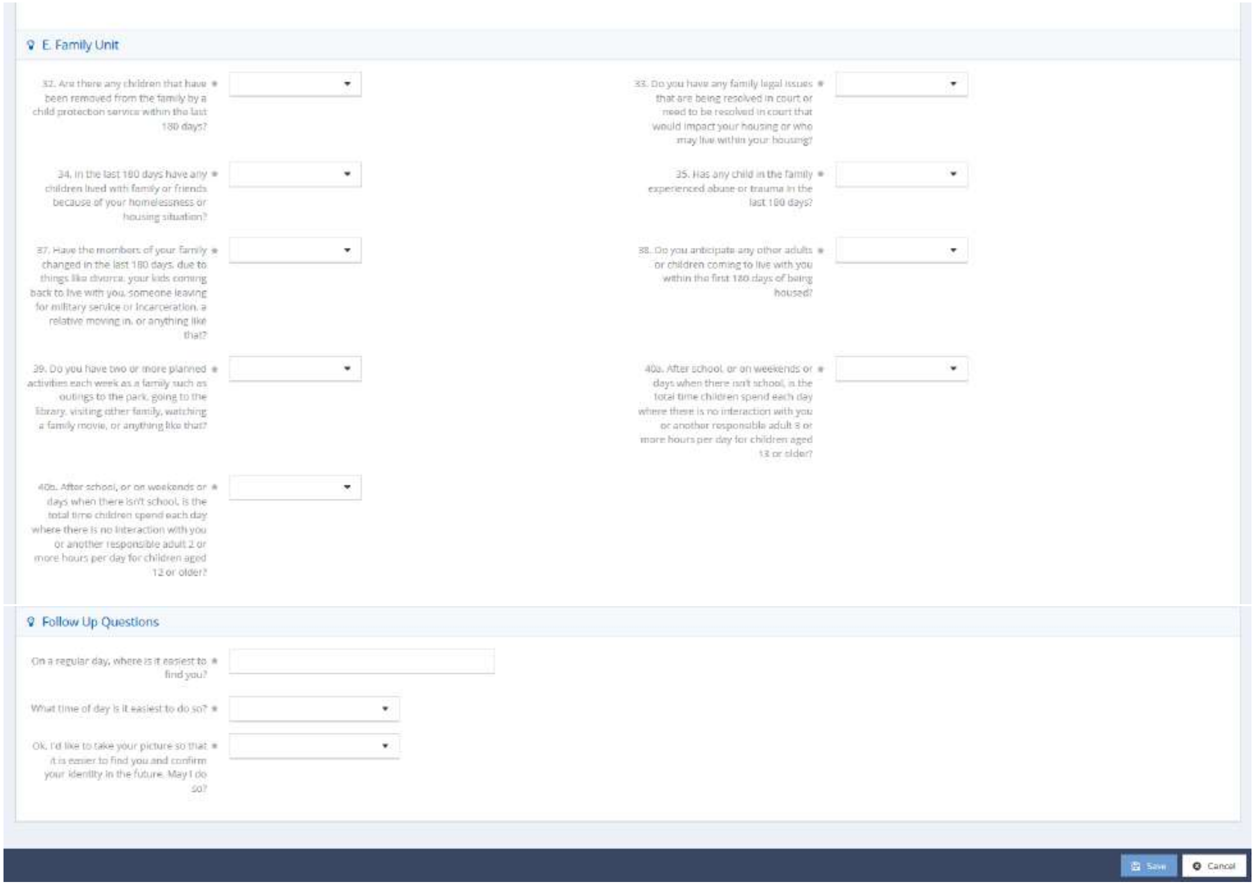
The Family VI SPDAT Version 2 Summary form displays.

To edit or print an existing assessment, click the action gear  icon associated with the desired assessment and select the appropriate menu item. To add a new assessment, simply select the  button.

The Family VI SPDAT Version 2 form displays in either case.




C. Socialization
14. Is there any person, past landlord, business, bookie, dealer, or government group like the IRS that thinks you or anyone in your family owe them money?
15. Do you or anyone in your family get any money from the government, a pension, an inheritance, working under the table, a regular job, or anything like that?
16. Does everyone in your family have planned activities, other than just surviving, that make them feel happy and fulfilled?
17. Is everyone in your family currently able to take care of basic needs like bathing, changing clothes, using a restroom, getting food and clean water and other things like that?
18. Is your family's current homelessness in any way caused by a relationship that broke down, an unhealthy or abusive relationship, or because other family or friends caused your family to become evicted?
D. Wellness
19. Has your family ever had to leave an apartment, shelter program, or other place you were staying because of the physical health of you or anyone in your family?
20. Do you or anyone in your family have any chronic health issues with your liver, kidneys, stomach, lungs or heart?
21. If there was space available in a program that specifically assists people that live with HIV or AIDS, would that be of interest to you or anyone in your family?
22. Does anyone in your family have any physical disabilities that would limit the type of housing you could access, or would make it hard to live independently because you'd need help?
23. When someone in your family is sick or not feeling well, does your family avoid getting medical help?
24. Has drinking or drug use by you or anyone in your family led your family to being kicked out of an apartment or program where you were staying in the past?
25. Will drinking or drug use make it difficult for your family to stay housed or afford your housing?
26a. Has your family ever had trouble maintaining your housing, or been kicked out of an apartment, shelter program or other place you were staying, because of a mental health issue or concern?
26b. Has your family ever had trouble maintaining your housing, or been kicked out of an apartment, shelter program or other place you were staying, because of a past head injury?
26c. Has your family ever had trouble maintaining your housing, or been kicked out of an apartment, shelter program or other place you were staying, because of a learning disability, developmental disability, or other impairment?
27. Do you or anyone in your family have any mental health or brain issues that would make it hard for your family to live independently because help would be needed?
29. Are there any medications that a doctor said you or anyone in your family should be taking that, for whatever reason, they are not taking?
30. Are there any medications like painkillers that you or anyone in your family don't take the way the doctor prescribed or where they sell the medication?
31. Has your family's current period of homelessness been caused by an experience of emotional, physical, psychological, sexual, or other type of abuse, or by any other trauma you or anyone in your family have experienced?



Enter information into all fields, as they are all required. If the participant has not consented to participate, sections A, B, C, D and E collapse and are no longer accessible.

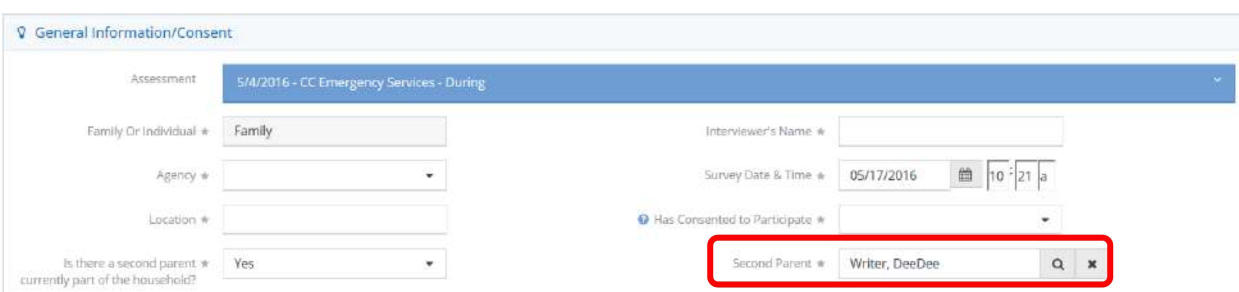
To add a second parent to the household, select “yes” when prompted by the field “Is there a second parent currently part of the household?” under the General Information/Consent portion of the assessment.

The new field Second Parent appears upon selection.

Use the magnifying glass icon to select a parent.

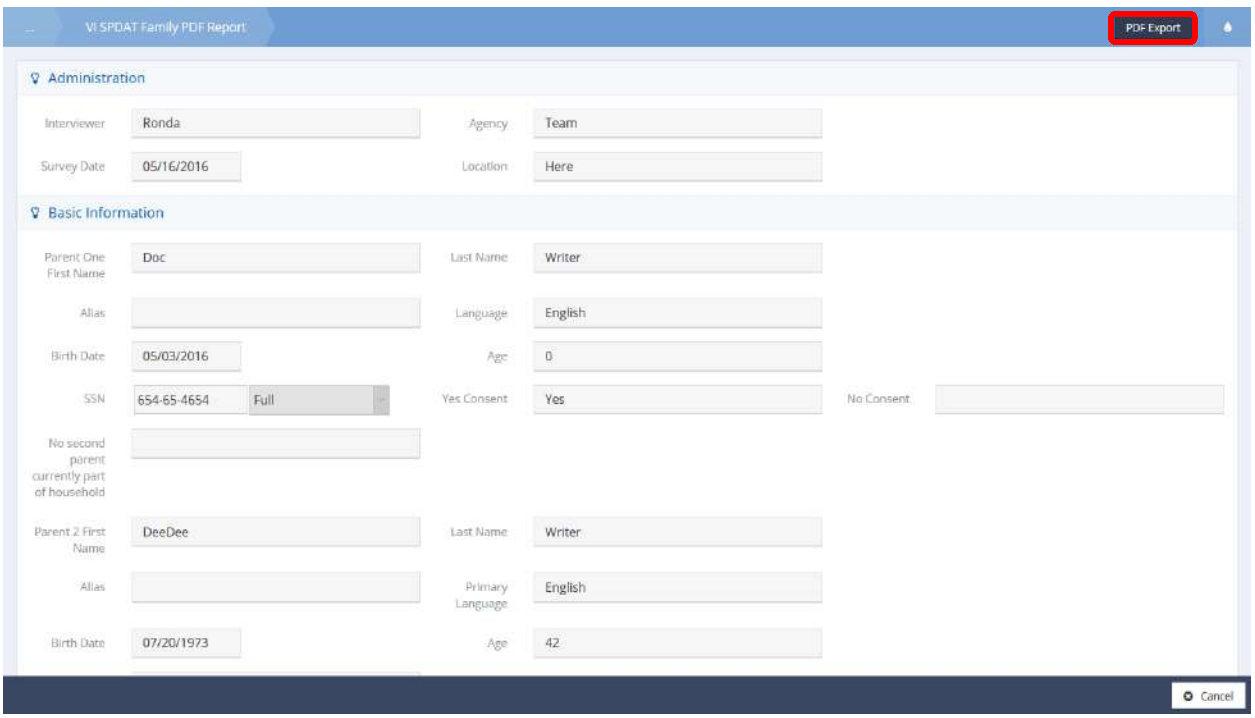
The Select Family Member form displays.

Select a family member from one of the rows.



The family member name appears in the dialog box. To print an existing assessment, simply select the action gear icon associated with the assessment and select Print from the menu options.

The VI SPDAT Family PDF Report form displays.

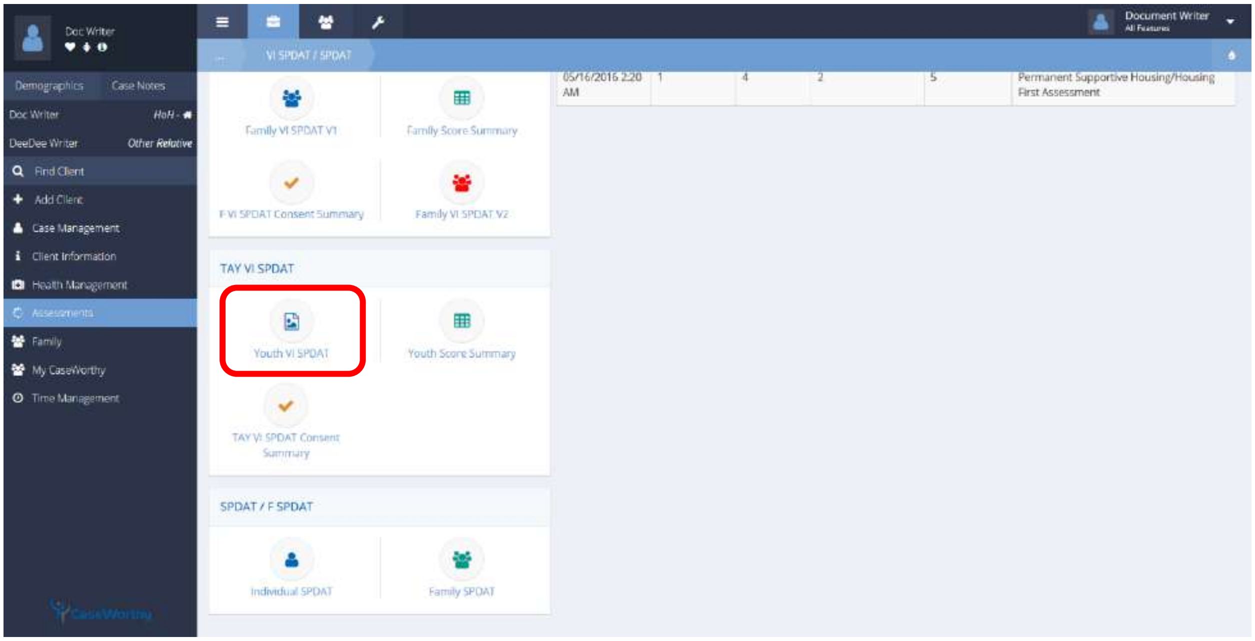


Select the PDF Export button. The report downloads. Print according to any appropriate computer settings.

Youth VI SPDAT

Objective: View, add, and print new assessments.

Navigation: Case Management>Assessments>VI SPDAT and SPDAT

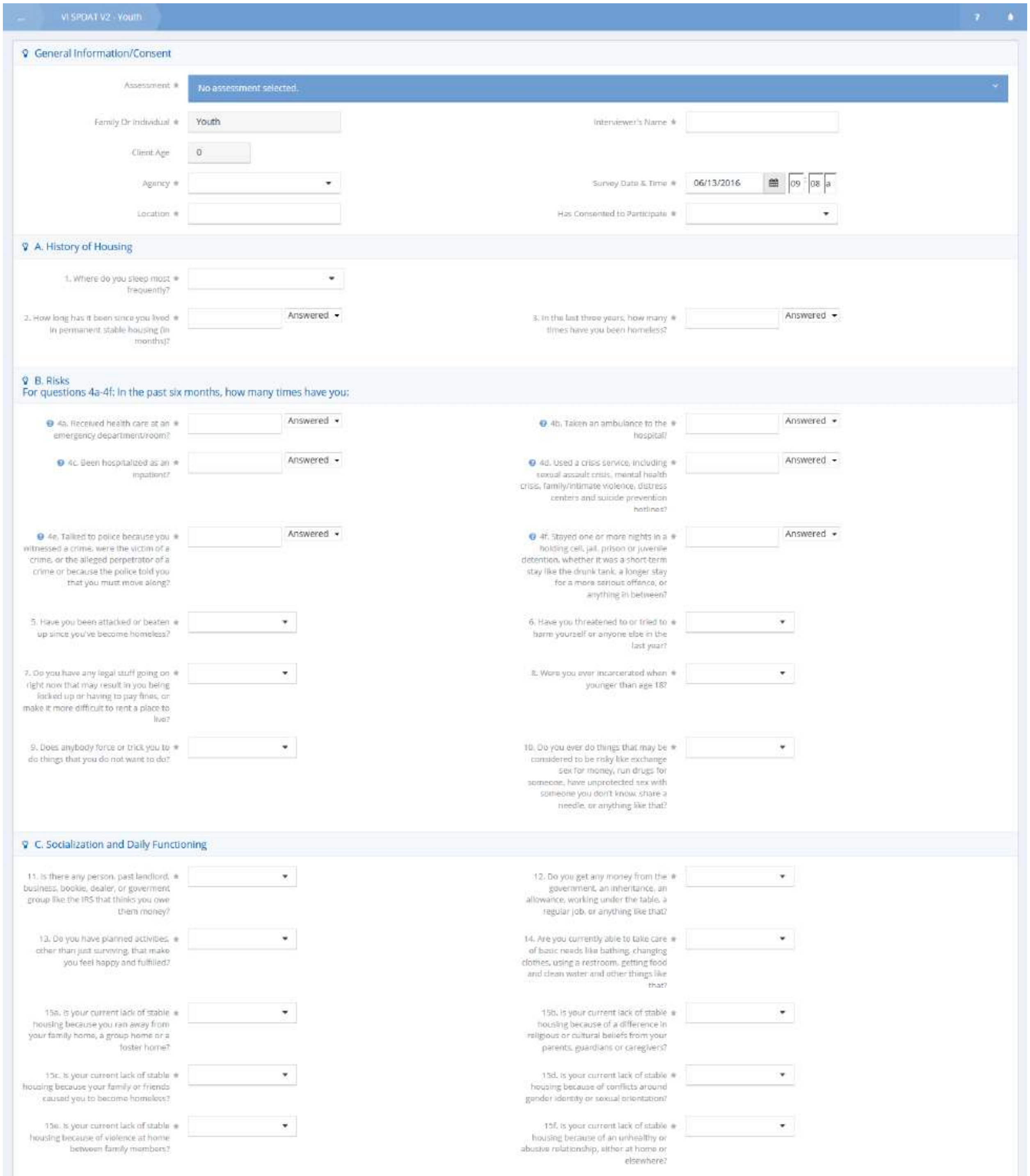


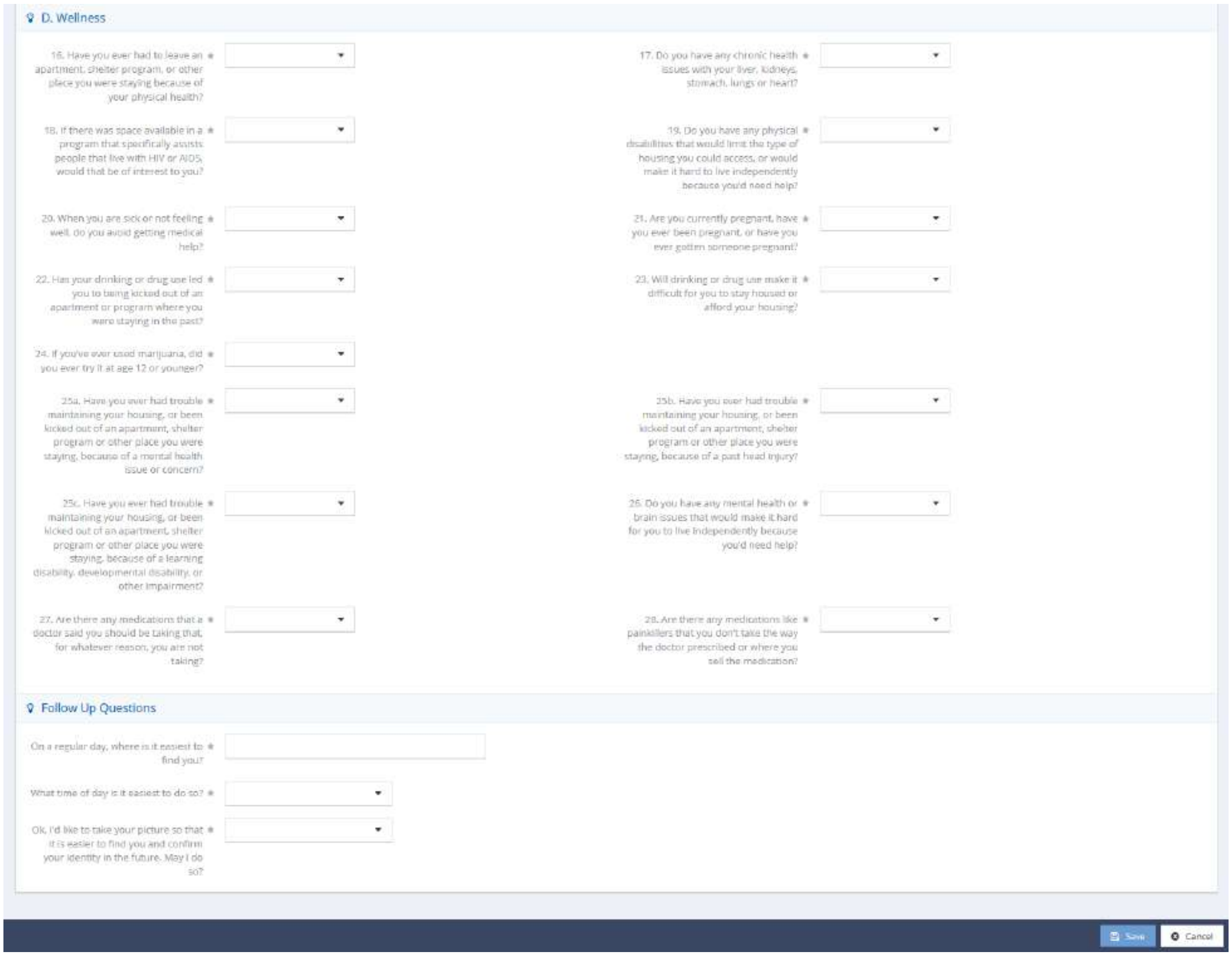
Select Youth VI SPDAT from the TAY VI SPDAT portion of the VI SPDAT and SPDAT dashboard.

The VI SPDAT Youth Summary form displays.

To edit an existing assessment, click the action gear icon associated with the desired assessment and select Edit from the menu options. To add a new assessment, select the Add New button.

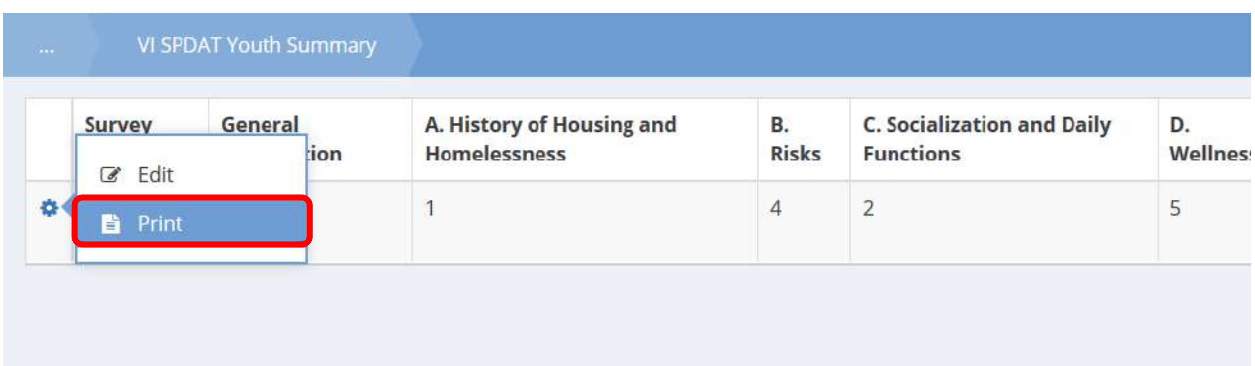
The VI SPDAT V2 – Youth form displays in either case.



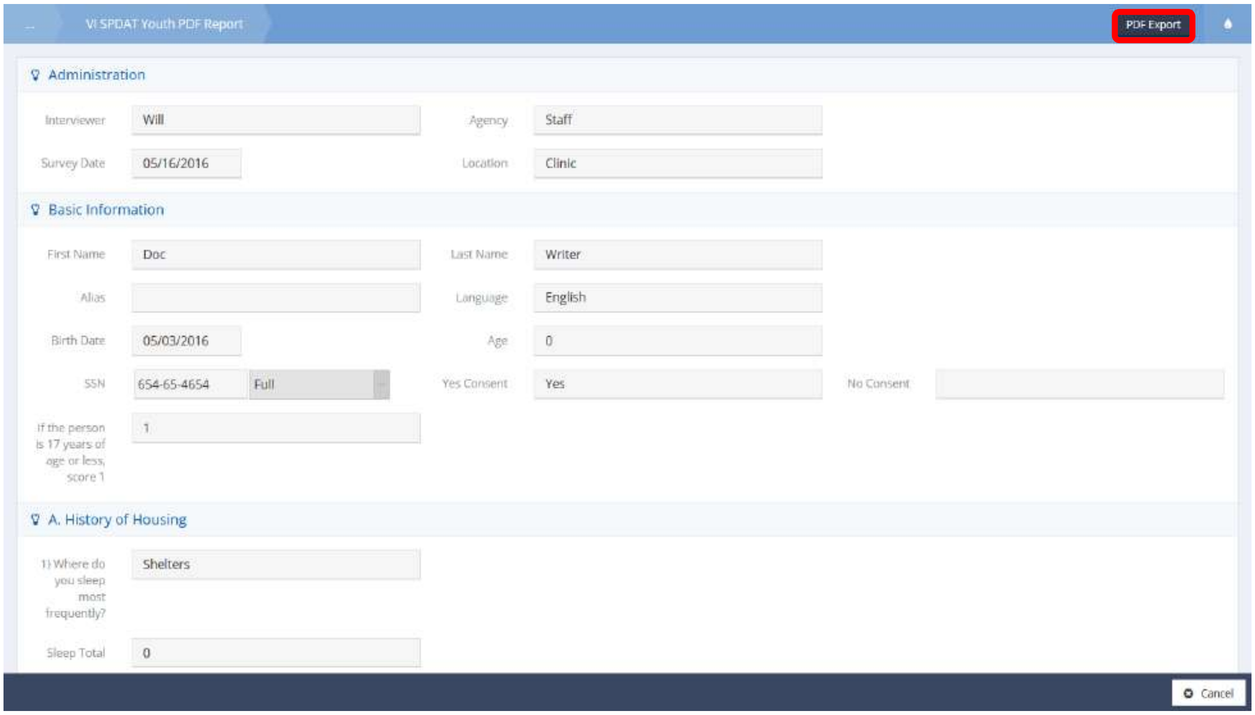


Enter information into all fields, as they are all required. Click the Save button to save and exit.

To print an existing assessment, simply select the action gear icon associated with the desired assessment and then select Print from the menu options.



The VI SPDAT Youth PDF Report form displays.

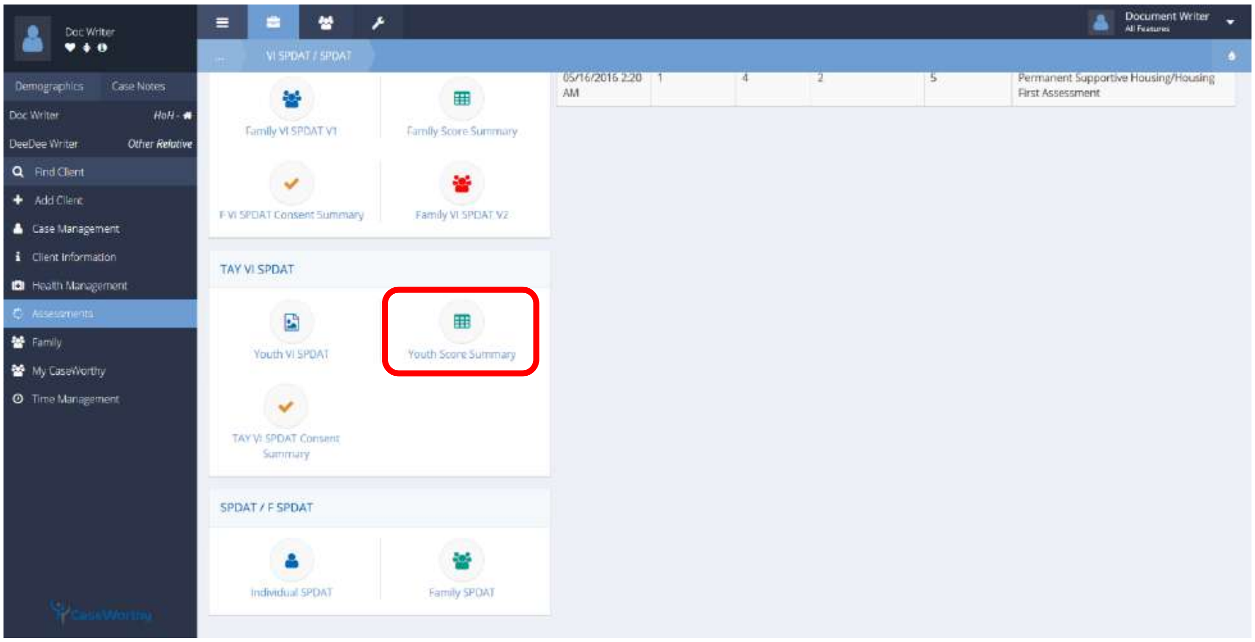


Select the PDF Export button. The report downloads. Print according to any appropriate computer settings.

Youth Score Summary

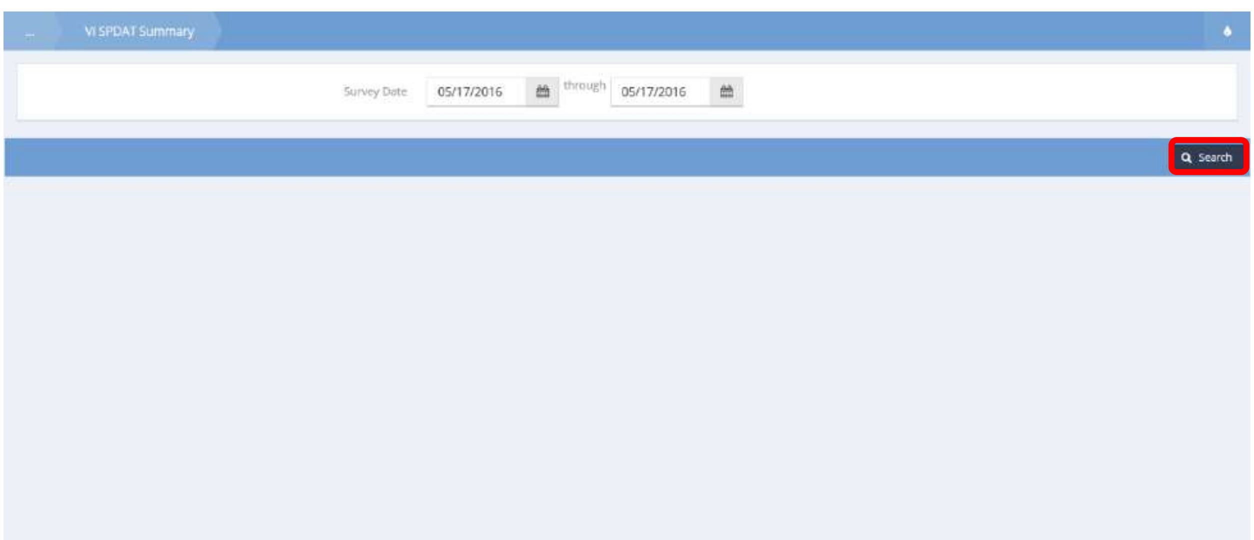
Objective: View score summary for Youth VISPDAT assessments.

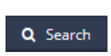
Navigation: Case Management>Assessments>VI SPDAT and SPDAT



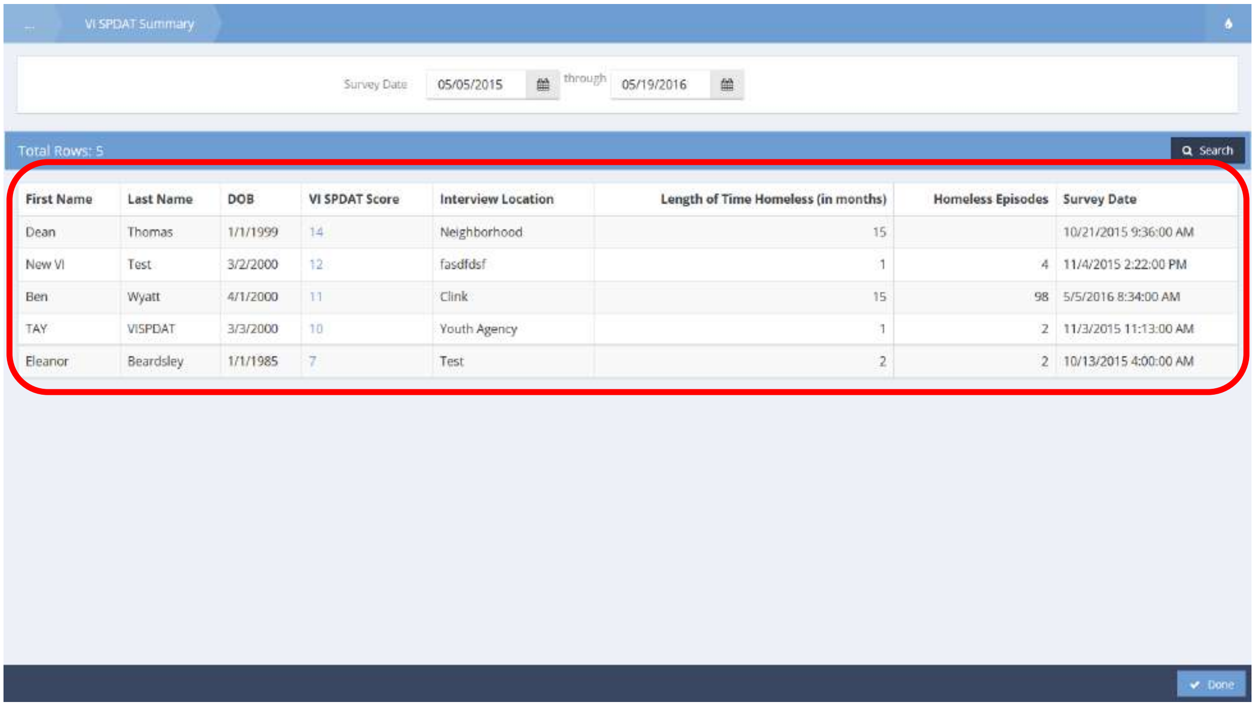
Select Youth Score Summary from the TAY VI SPDAT portion of the VI SPDAT and SPDAT dashboard.

The VI SPDAT Summary form displays.



Enter a date range and select the 

button to display existing assessments within the specified time frame.



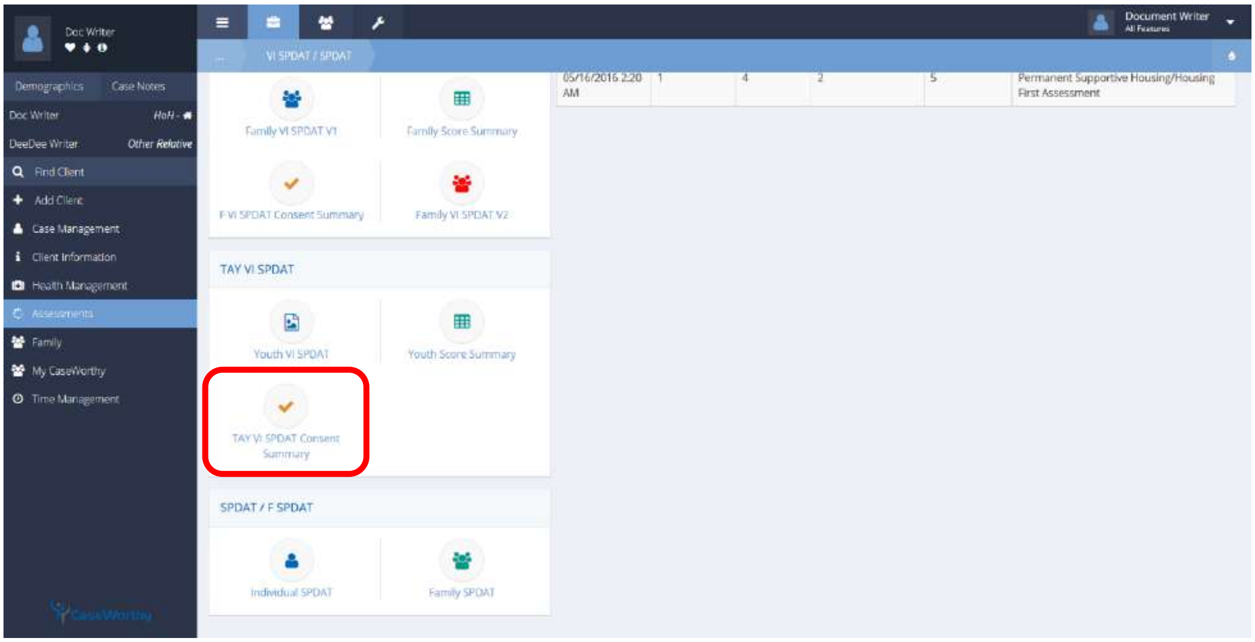
This is a view only form. Click the 

button when finished.

TAY VI SPDAT Consent Summary

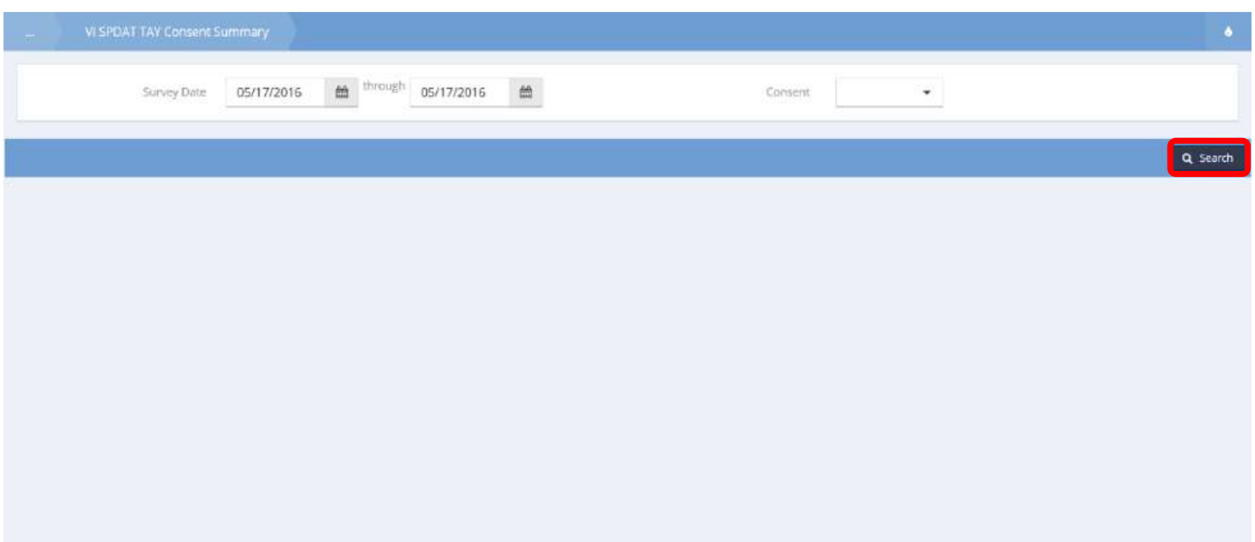
Objective: View TAY VI SPDAT summary based on consent given.

Navigation: Case Management>Assessments>VI SPDAT and SPDAT

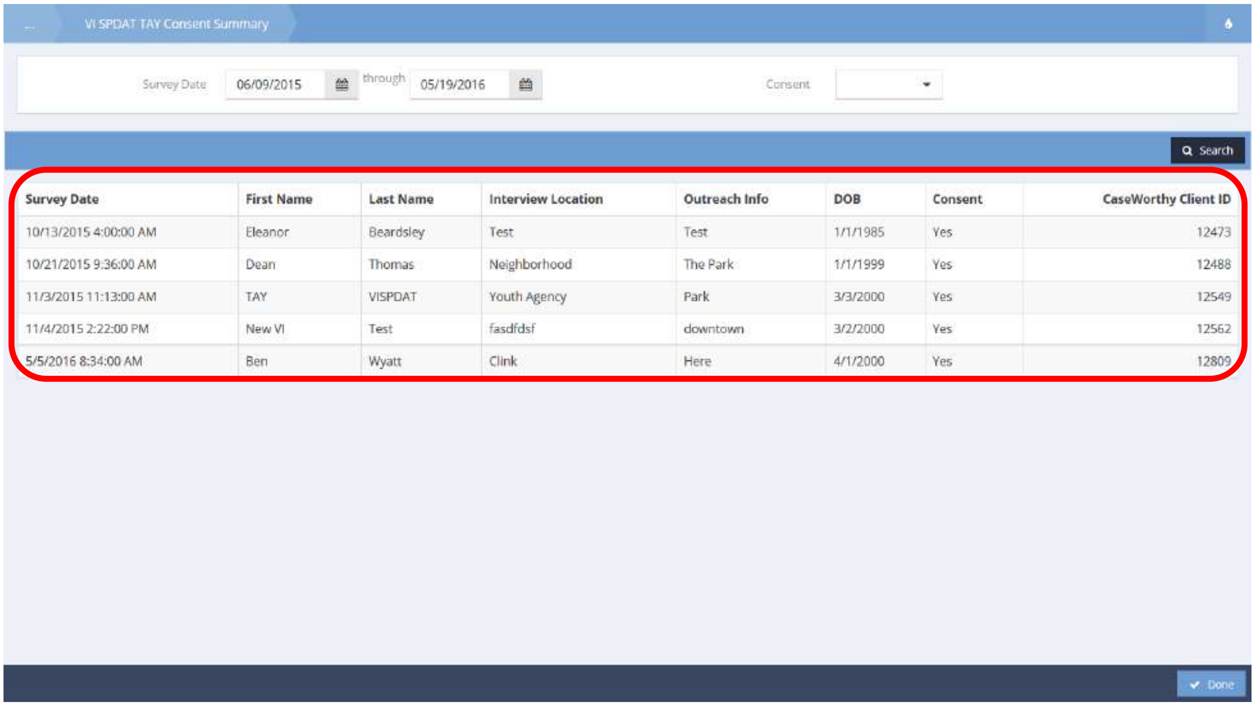


Select TAY VI SPDAT Consent Summary from the TAY VI SPDAT portion of the VI SPDAT and SPDAT dashboard.

The VI SPDAT TAY Consent Summary form displays.



Enter a date range and indicate which consent type to view, "yes" or "no", then select the Search button to display existing assessments within the specified time frame.


VI SPDAT TAY Consent Summary

Survey Date 06/09/2015 through 05/19/2016 Consent

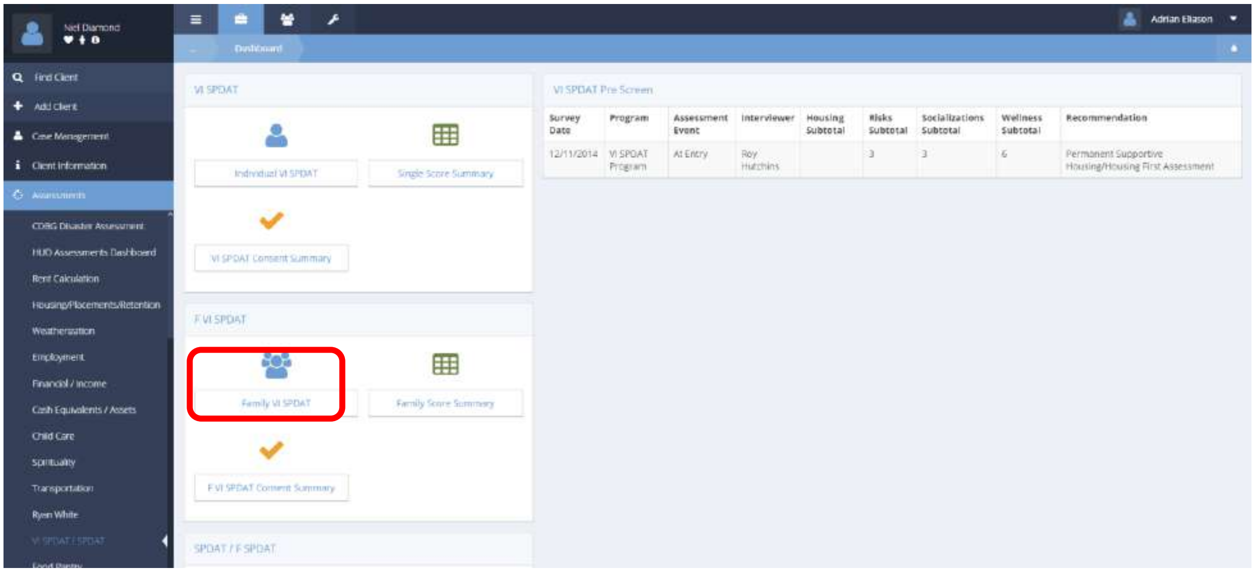
Search

Survey Date	First Name	Last Name	Interview Location	Outreach Info	DOB	Consent	CaseWorthy Client ID
10/13/2015 4:00:00 AM	Eleanor	Beardsley	Test	Test	1/1/1985	Yes	12473
10/21/2015 9:36:00 AM	Dean	Thomas	Neighborhood	The Park	1/1/1999	Yes	12488
11/3/2015 11:13:00 AM	TAY	VISPDAT	Youth Agency	Park	3/3/2000	Yes	12549
11/4/2015 2:22:00 PM	New VI	Test	fasdfdsf	downtown	3/2/2000	Yes	12562
5/5/2016 8:34:00 AM	Ben	Wyatt	Clink	Here	4/1/2000	Yes	12809

Done

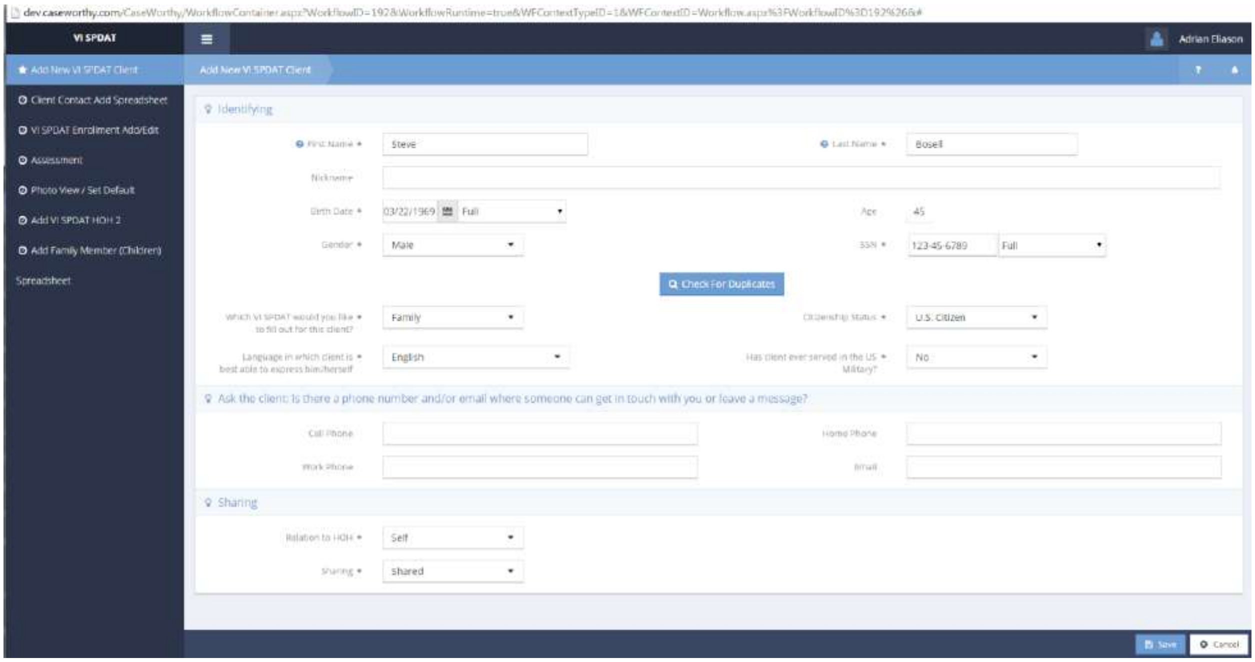
This is a view only form. Click the Done button when finished.

Family VI SPDAT



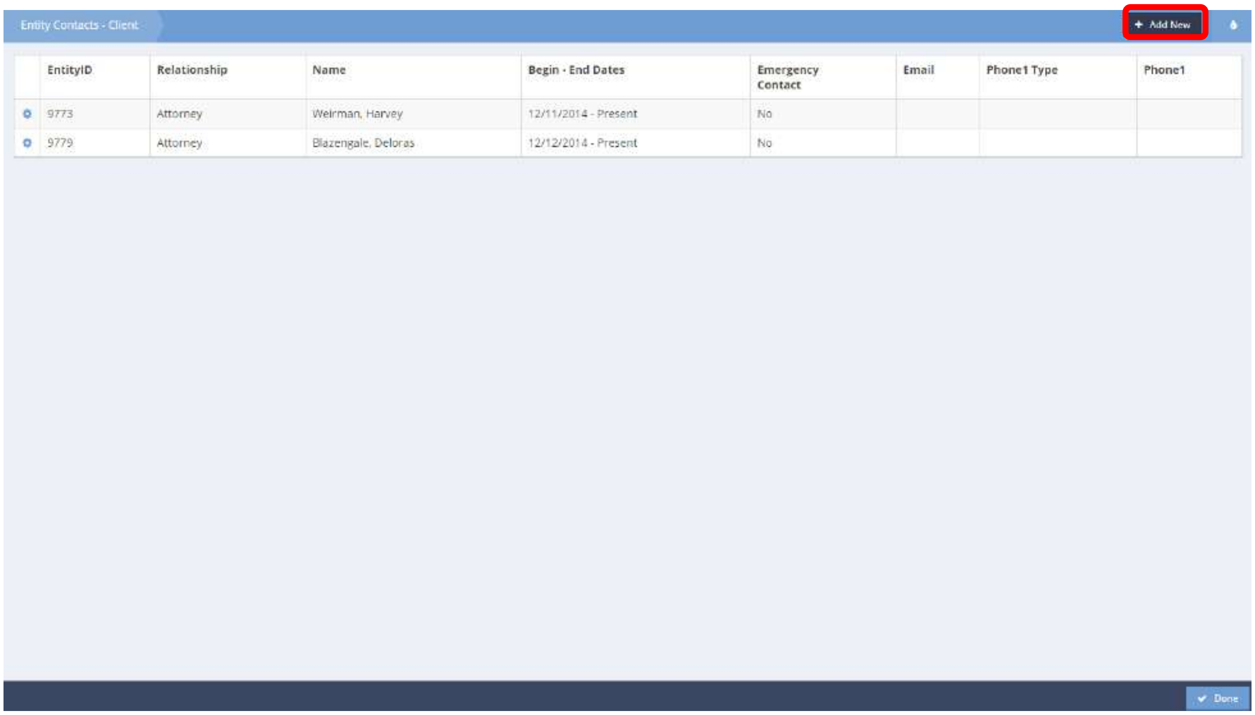
Click on the Family VI SPDAT icon in the F VI SPDAT menu on the VI SPDAT dashboard. The Family VI SPDAT Summary display. Click **+ Add New** to begin a new assessment.

The workflow displays.

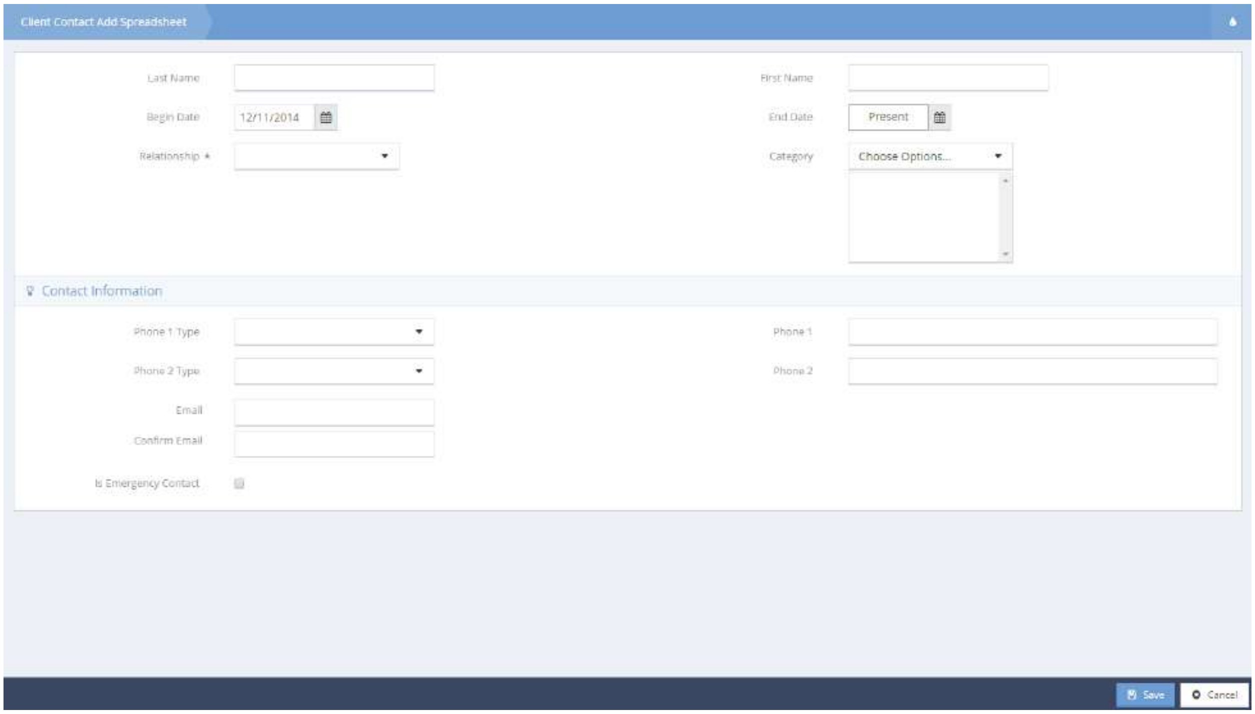


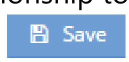
Enter the first section of identifying information including name, date of birth, social security number and gender. Click on the **Check For Duplicates** button. The space expands, listing any existing clients that may be a close match to the entered information. See if the new client is already in the system. If so, click on the name presented in the list. If not, click on the **This is a new client** button. Select the desired VI SPDAT (Family or Individual) from the drop-down list. Select values from the drop-down lists for language, citizenship and military service. Enter any contact information and select a value from the drop-down lists for relationship to head of household and information sharing. Click on the **Save** button.

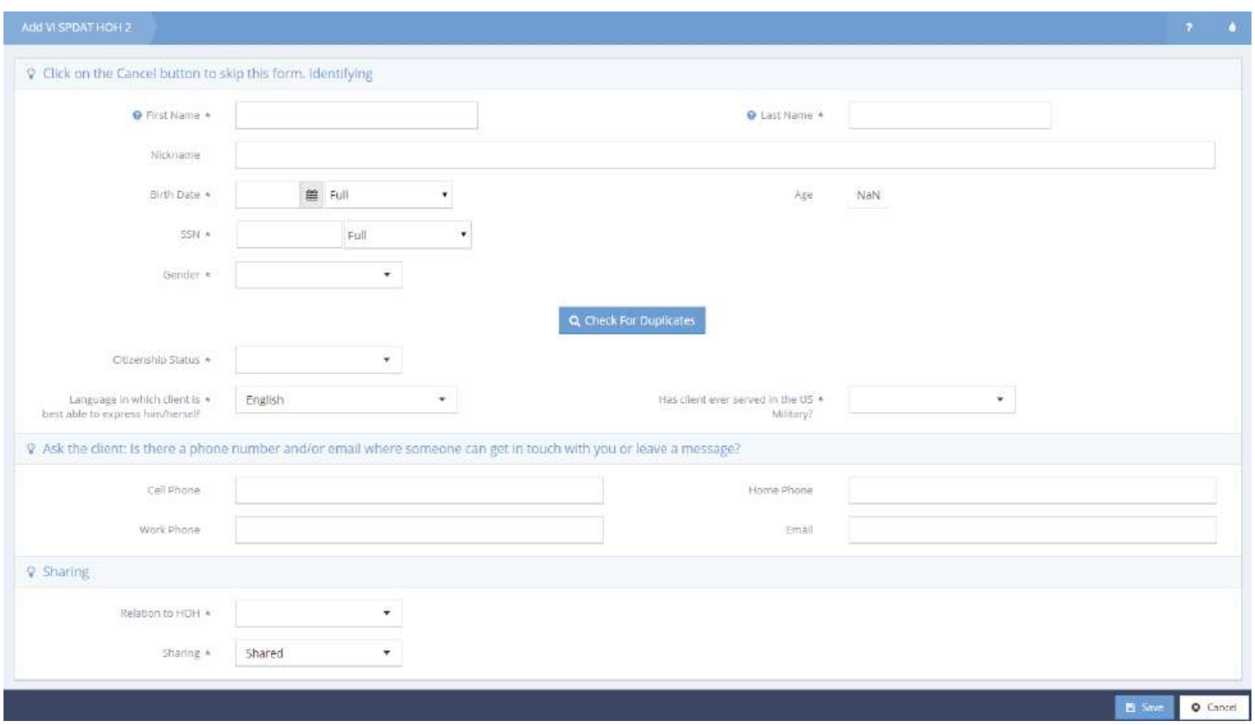
The next step in the workflow appears.



A list of the client's contact displays. To add a new client, click the Add New button. When finished, click the Done button.



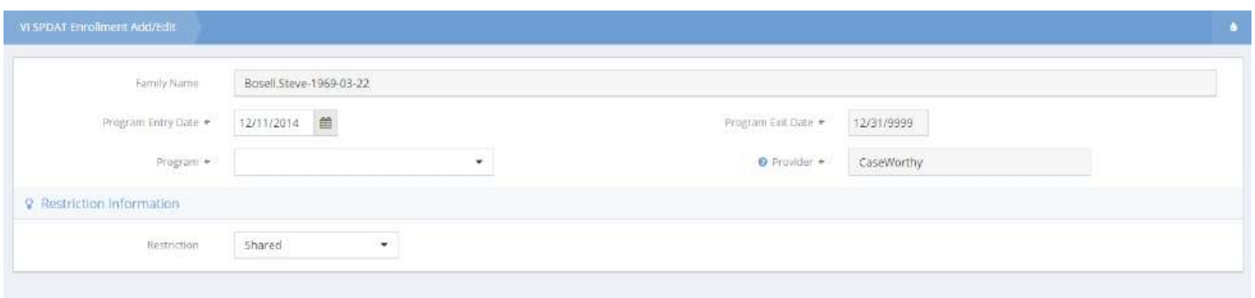
To add a client contact, select their relationship to the client from the drop-down list and enter any available contact information. Click the  button to move to the next step in the work flow.



To add a second head of household, fill out the form following the example of the Add New Client form. If no second head of household is to be added, click on the Cancel button. The next step of the workflow displays.

Add any children to the family assessment by clicking on the Add Row button and adding the required and desired information to the expanded row that displays. Repeat this process until all children have been added. Click on the Save button.

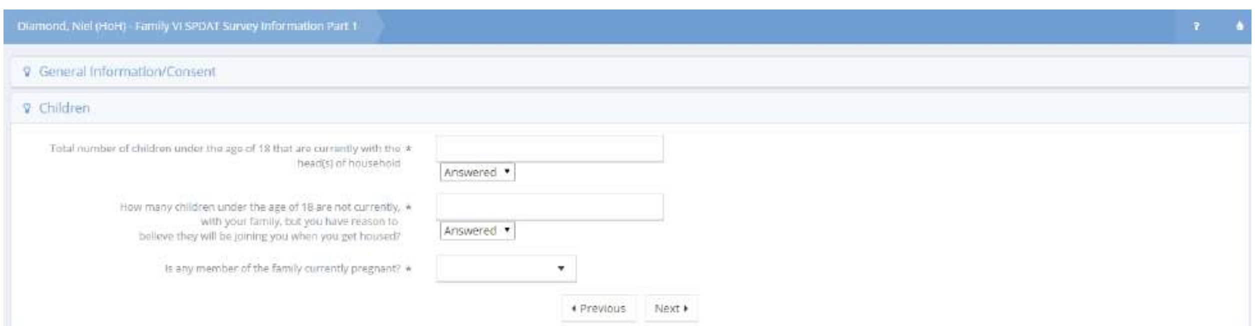
The next step of the workflow displays.



Alter the Program Entry Date if desired and select Family VI SPDAT from the drop-down list displayed upon clicking in the Program field. Alter the Provider and Restriction fields if desired. Click on the Save button.

The Family VI SPDAT survey step displays.

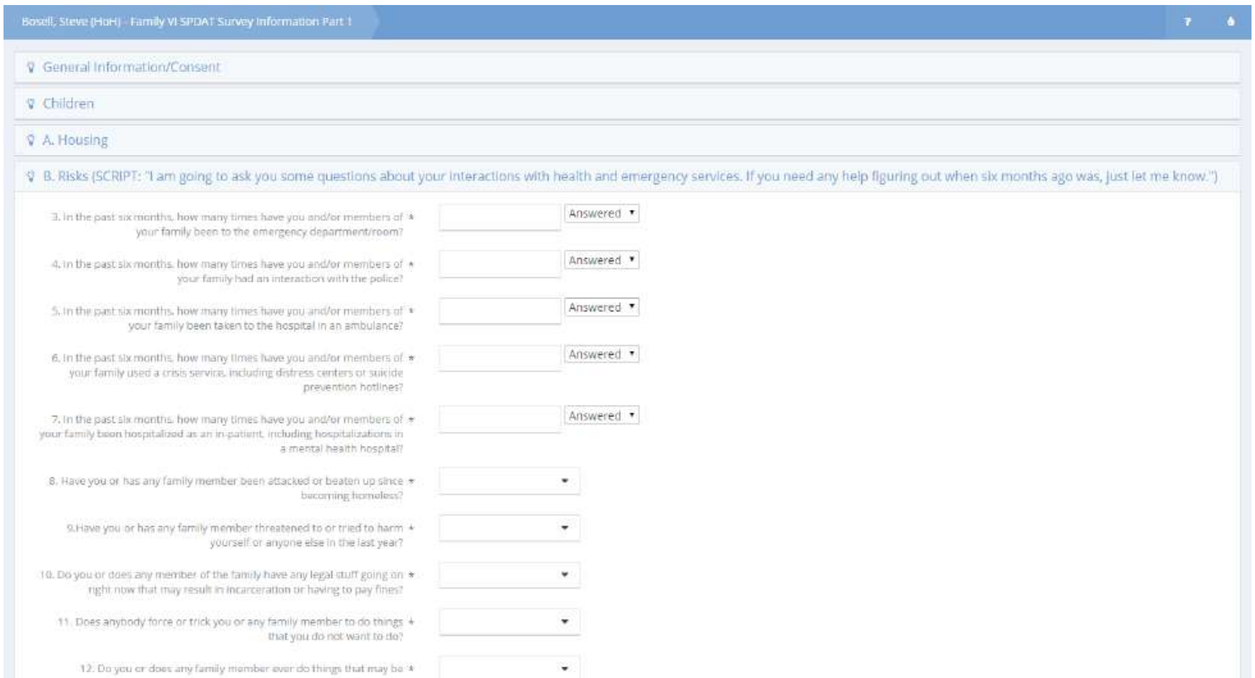
Enter the interviewer's name and the agency with which they are affiliated. Adjust the Survey Date & Time as desired. Enter the location and indicate whether the client agrees to participate in the survey. Click on the Next button. The General Information/Consent section of the assessment form collapses and the next step, Children, expands.



Ask the client the questions, enter their responses and click the Next button to continue. The housing related questions appear.

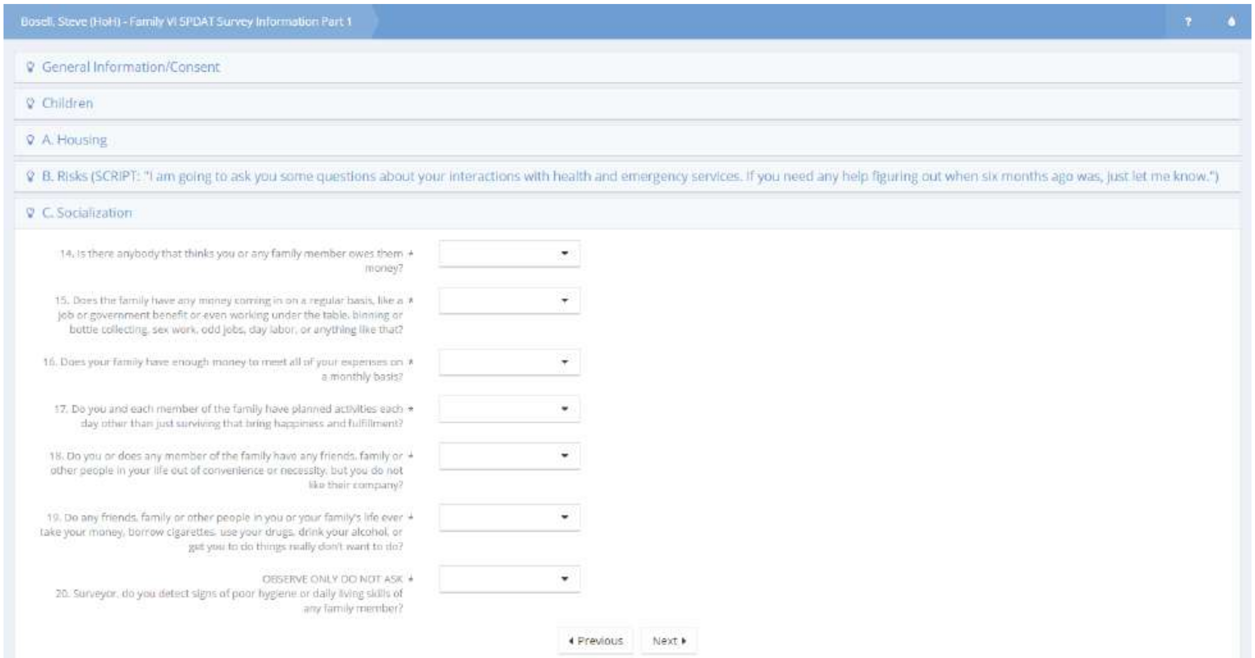

Bosell, Steve (HoH) - Family VI SPDAT Survey Information Part 1
General Information/Consent
Children
A. Housing
1. What is the total length of time you and your family have lived on the streets or in shelters (in months)? *
Answered
2. In the past three years, how many times have you and your family been housed and then homeless again? *
Answered
Previous
Next

Ask the client the questions, enter their responses and click the Next ▸ button to continue. The risk related questions appear.



Ask the client the questions, enter their responses and click the Next ▸ button to continue.

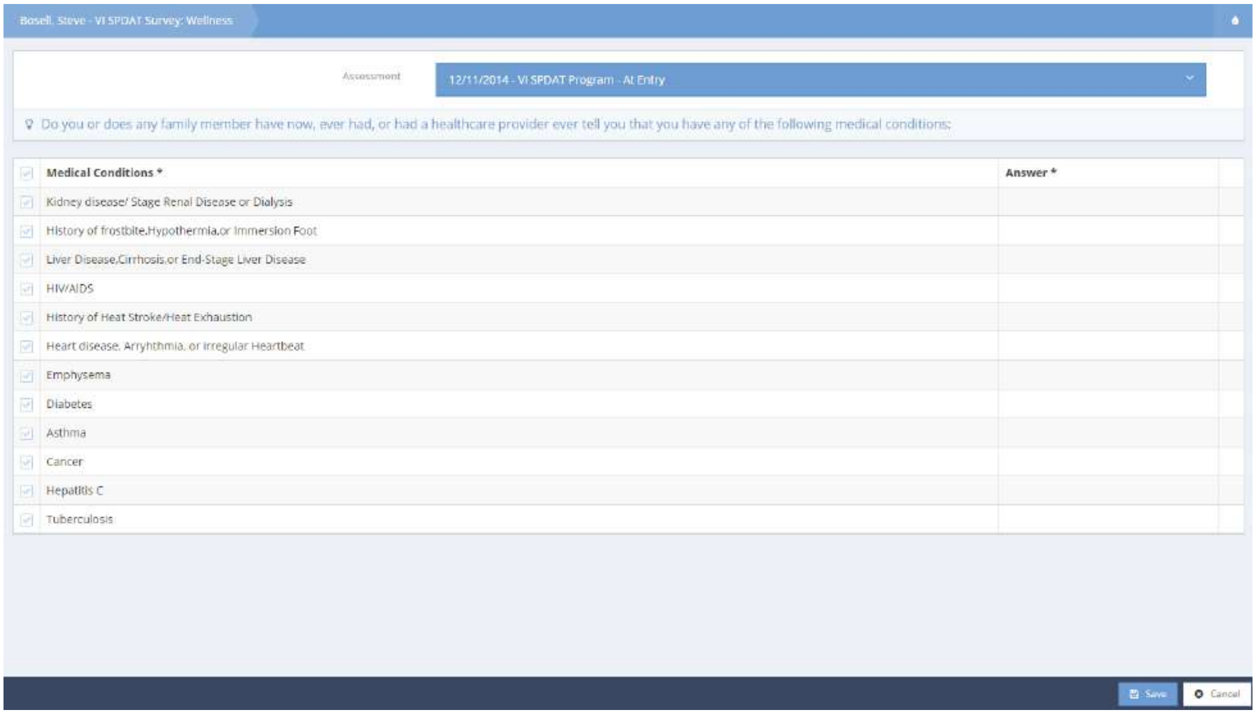
The socialization related questions appear.



Ask the client the questions, enter their responses and click the Next button to continue. The wellness related questions appear.

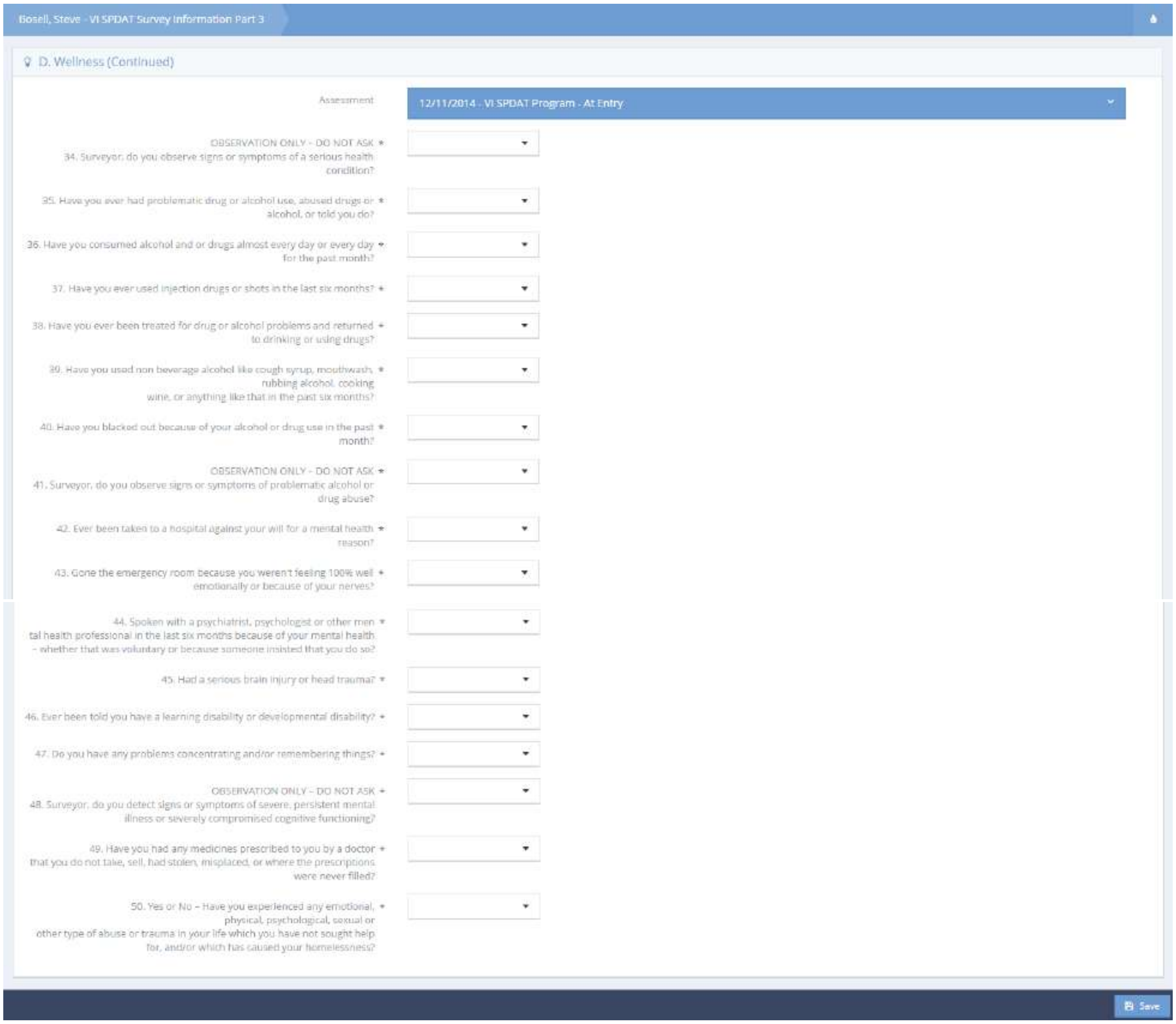
Ask the client the question, enter their response and click the Save button to continue.

The next page of wellness questions appears.



Click the checkbox for each condition and if the client indicates having the condition, change the answer to “Yes.” Click on the Save button.

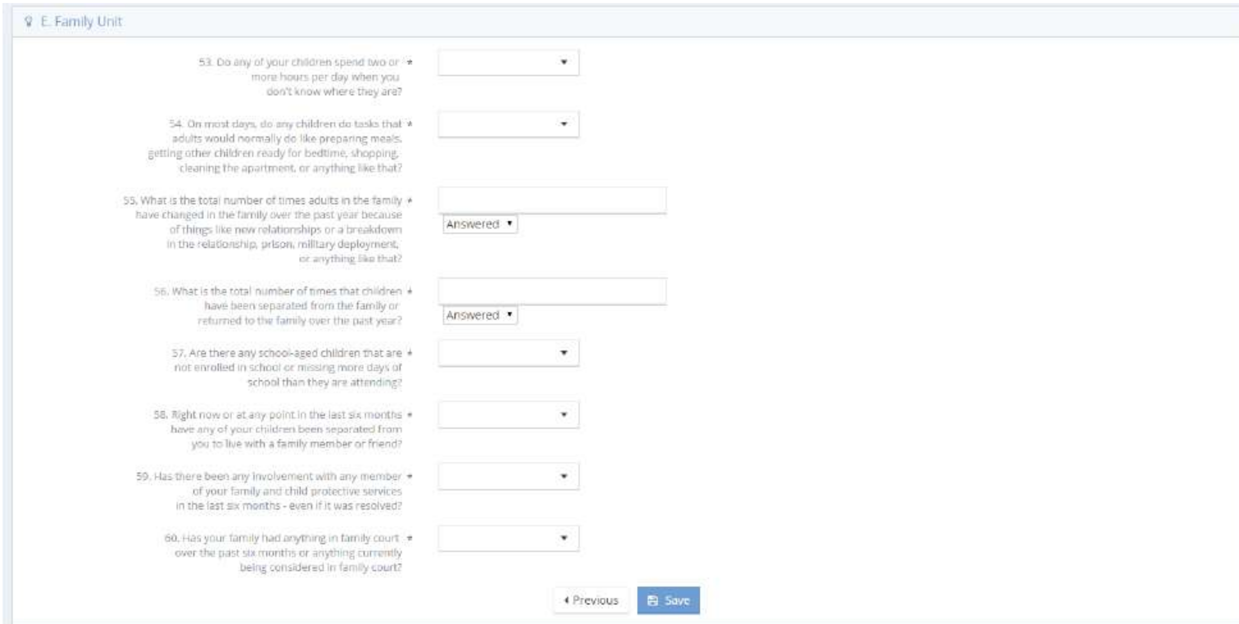
The next page of questions appears.



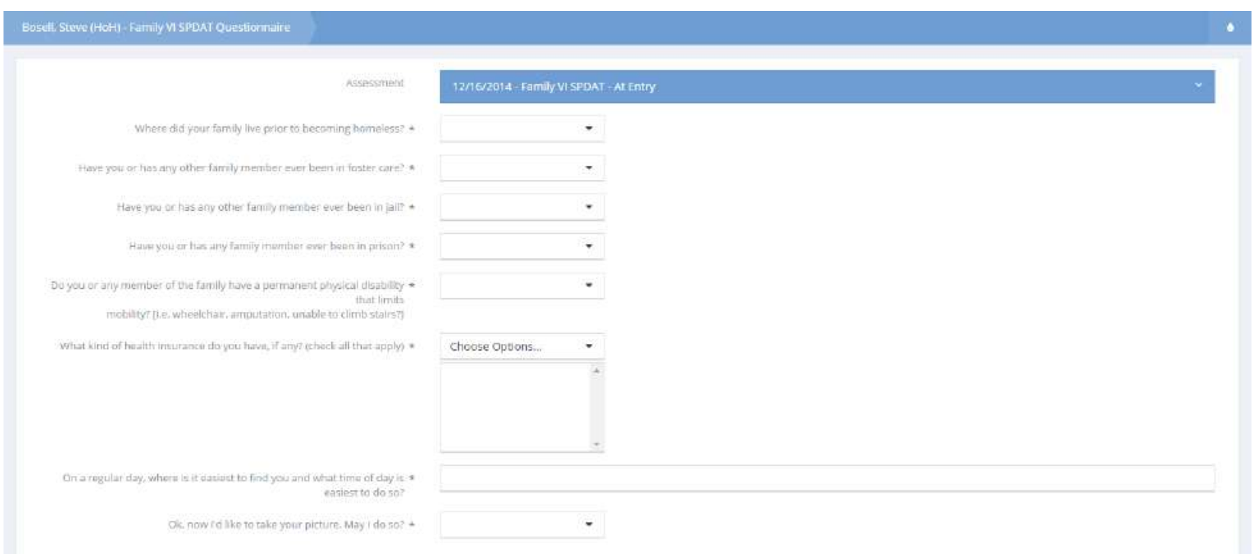
Ask the client the questions, enter their responses and click the 

button to continue.

The family unit related questions appear.



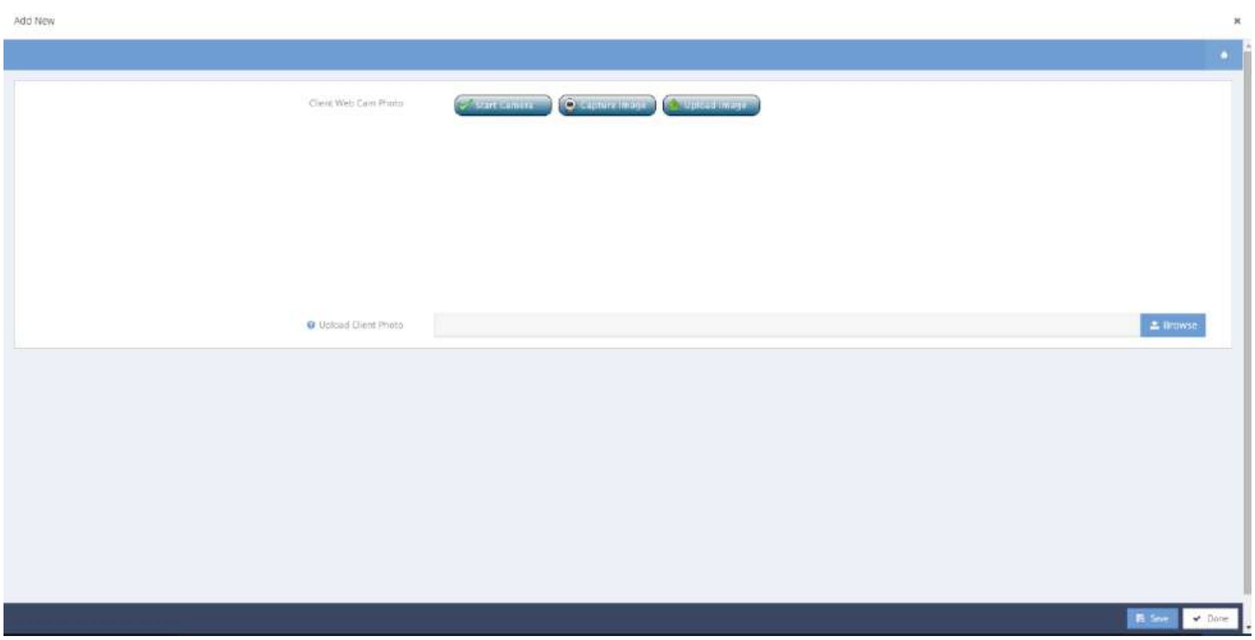
Ask the client the questions, enter their responses and click the Save button to continue. The next step in the assessment appears.



Ask the client the questions, enter their responses and click the Save button to continue. The first two questions related to military service only display if the client responded in the affirmative to an earlier question regarding military service. The last question on the form is a request to take the client's picture.

If they agree to have their picture taken, the following form appears when the interviewer saves the form.

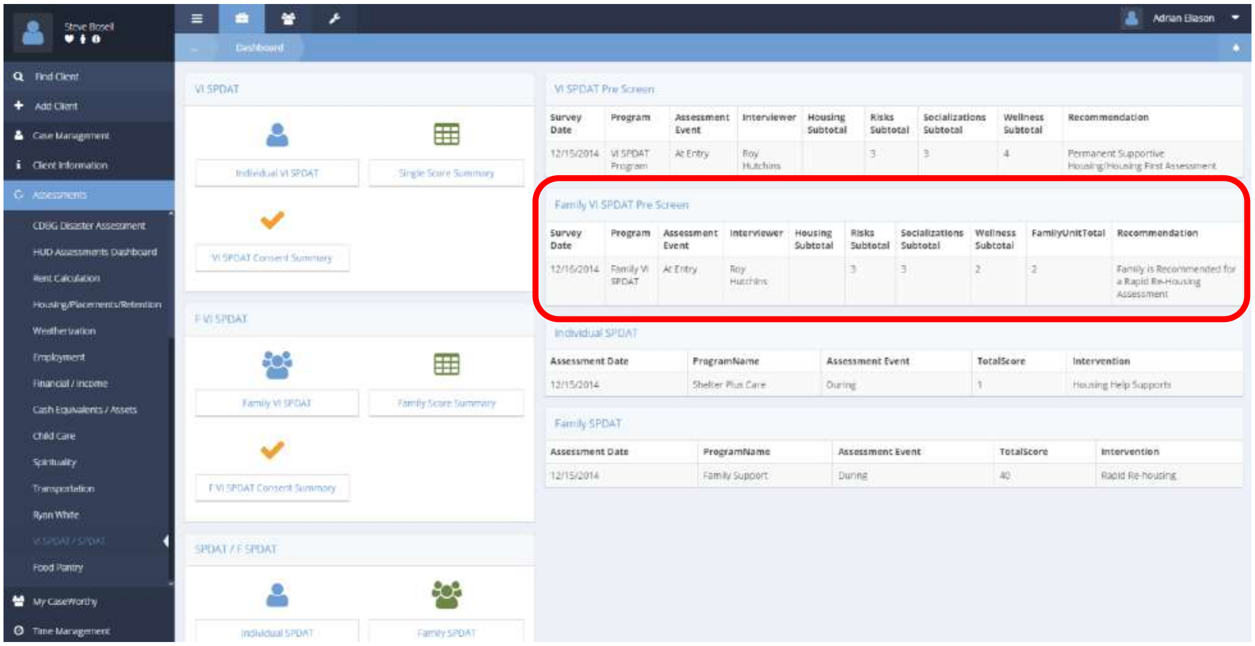
Click on the Add New button. The Add New form displays.



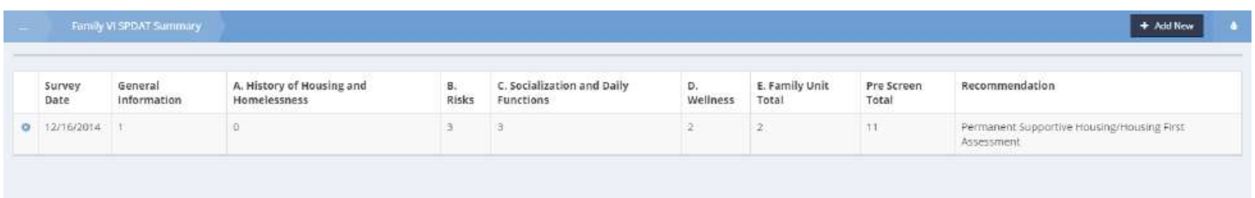
Start the camera, capture the image and upload the image. Alternatively, browse and select an image to upload. Click on the Save button. Verify that the image uploaded and click on the Done button.

The workflow is now complete. Verify that the assessment steps are all complete and click on the Done button.

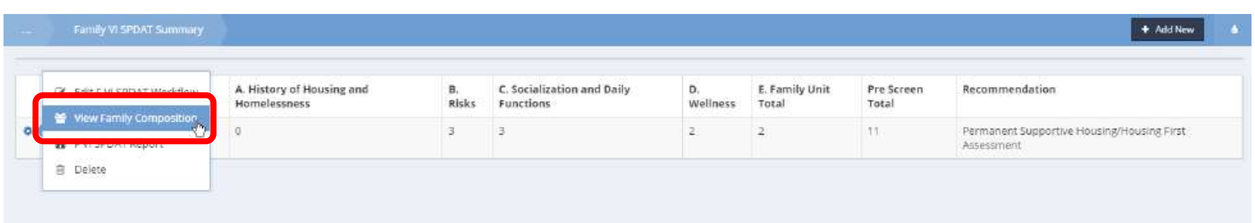
VI SPDAT Family Member Spreadsheet



Click on any of the data lines from the Family VI SPDAT Pre-Screen table on the dashboard. The Family VI SPDAT Summary form displays.



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



Select “View Family Composition” from the pop up menu that appears.

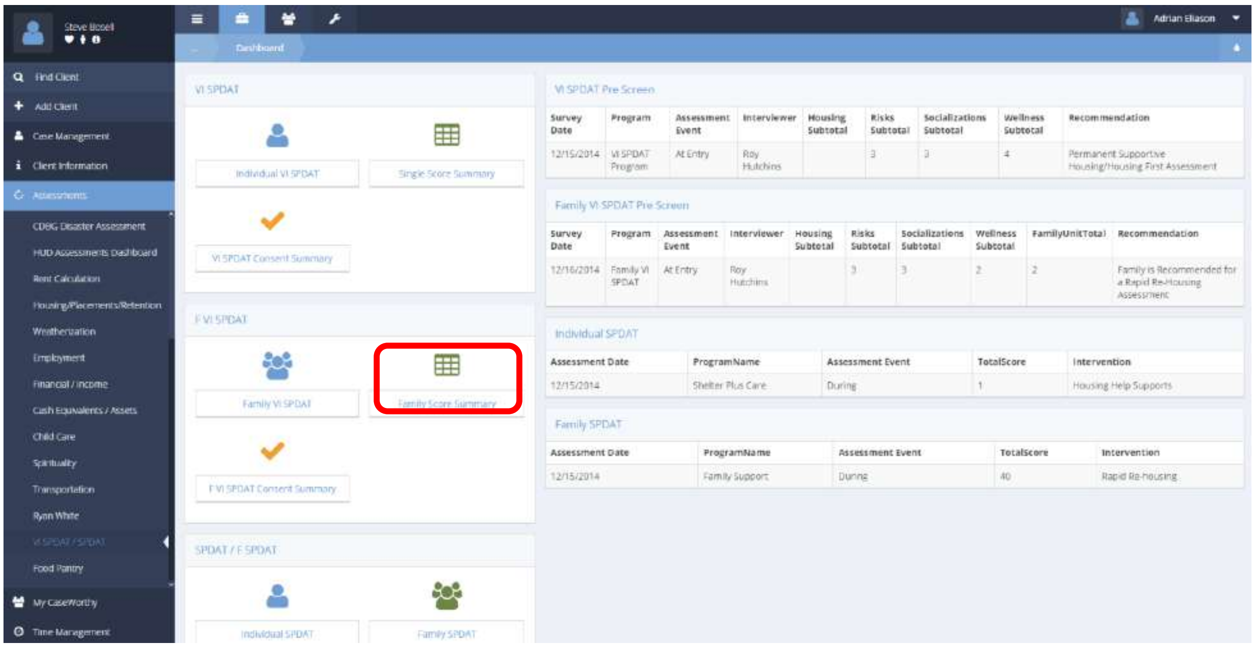
The VI SPDAT Family Member Spreadsheet form displays, listing the family members and their pertinent data.

VI SPDAT Family Member Spreadsheet

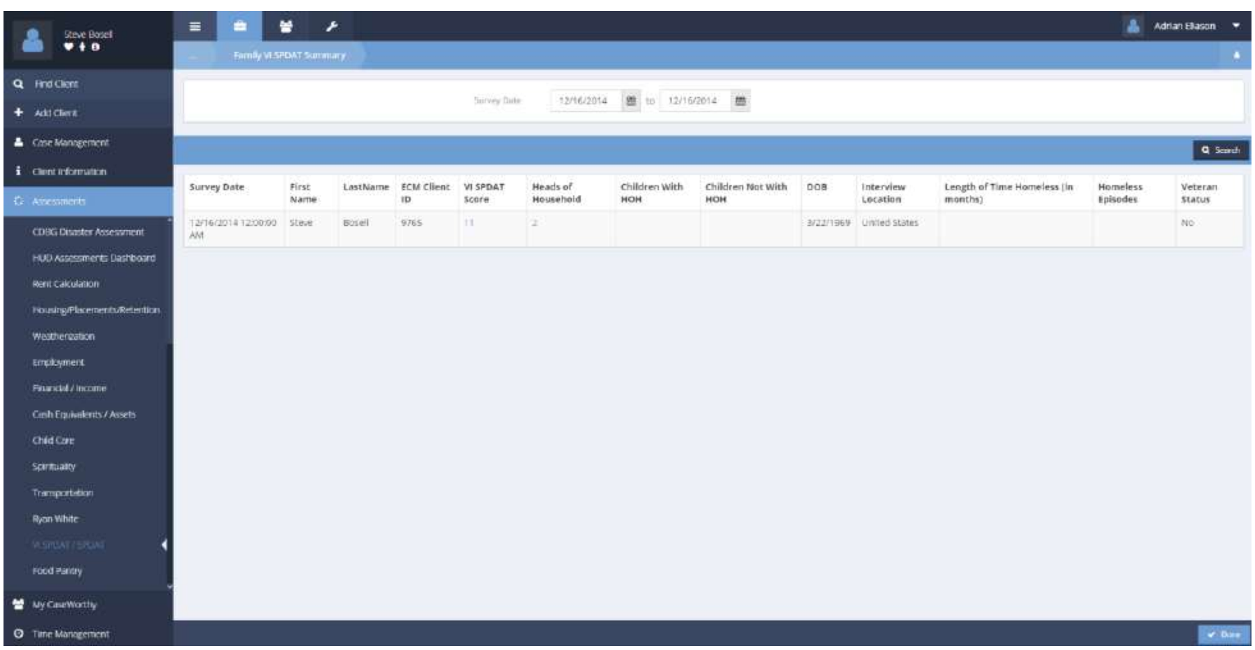
First Name	Last Name	Birth Date	Age	SSN	Gender	Relation to HOH
Steve	Bosell	3/22/1969	45	123-45-6789	Male	Self
April	Bosell	4/19/1970	44	123-44-5678	Female	Spouse
Steven Jr.	Bosell	5/22/2000	14	111-11-1111	Male	Child
April Jr.	Bosell	4/17/2004	10	111-11-1117	Female	Child

Family VI SPDAT Summary

The Individual VI SPDAT Score Summary form is accessed by clicking on the Family Score Summary icon on the F VI SPDAT menu of the VI SPDAT Dashboard.



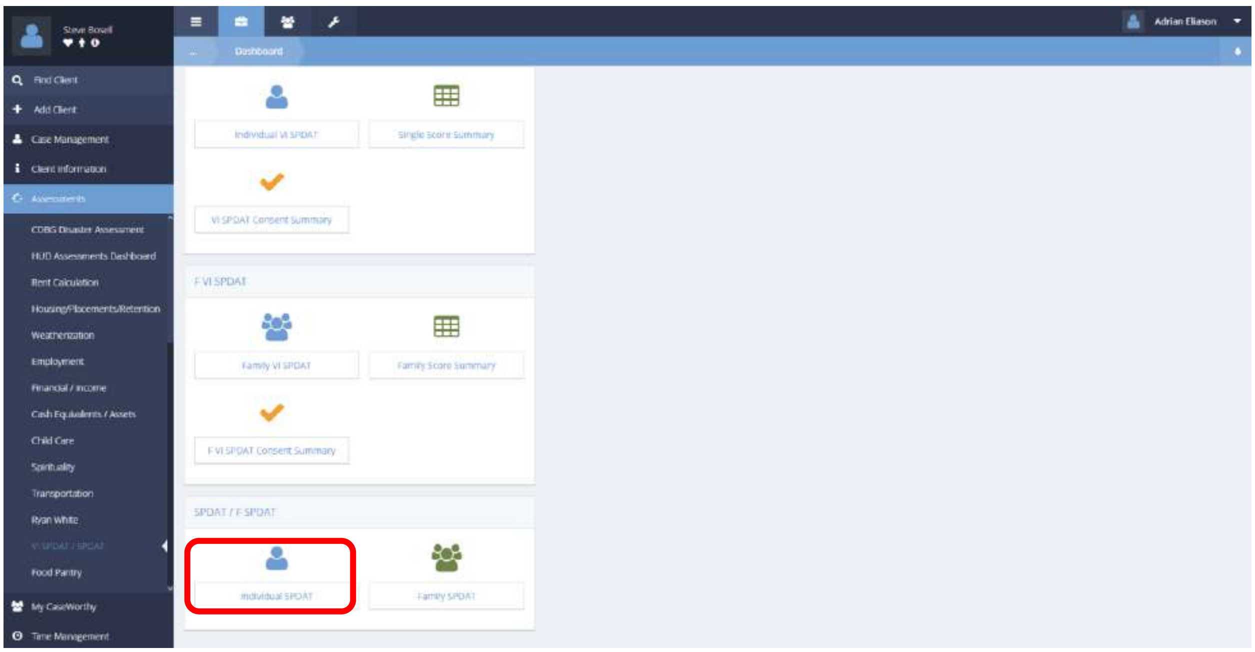
The form that displays presents all family VI SPDAT scores for the selected date range. This form is not filtered by current client.



SPDAT

Objective: Provides easily accessible prompt questions and assessment forms for SPDAT assessments for individuals and families. The assessment workflow is accessed through the SPDAT dashboard.

Navigation: Case Management>Assessments>SPDAT

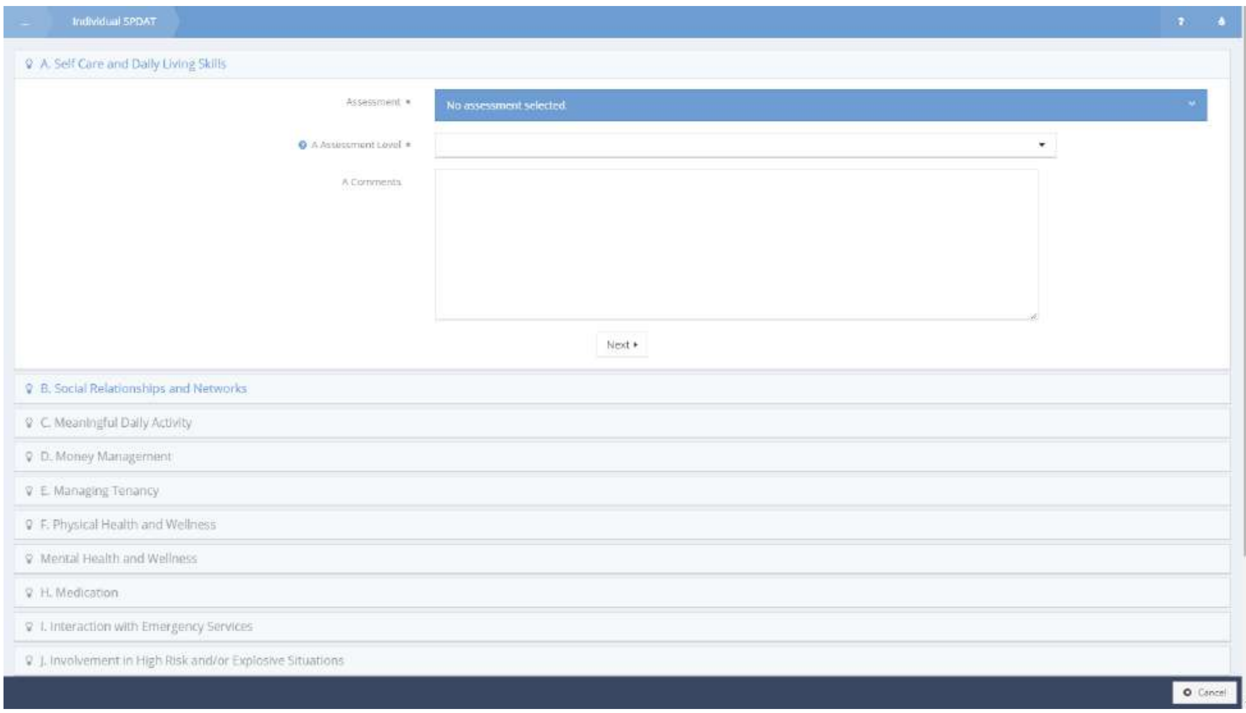


From the SPDAT dashboard, select the desired functionality; individual or family, by clicking on the appropriate menu icon.

Individual SPDAT

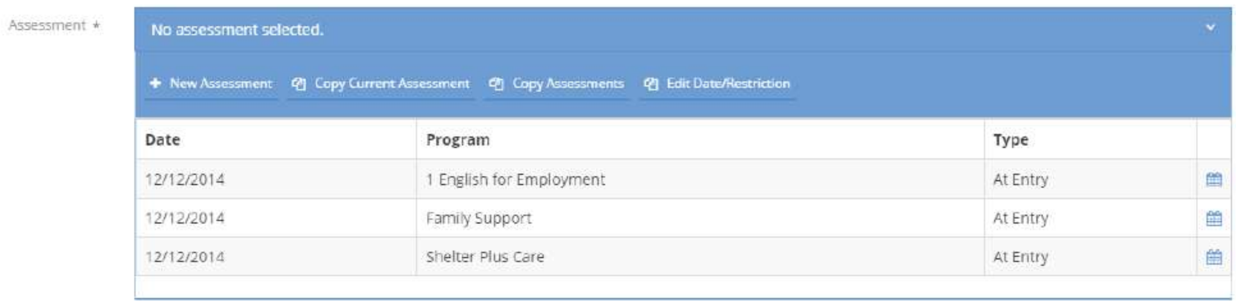
To create a new SPDAT assessment, proceed from the dashboard by clicking on the Individual SPDAT icon. The Individual SPDAT Summary form displays.

To initiate the assessment, click on the  button. The Individual SPDAT form displays.



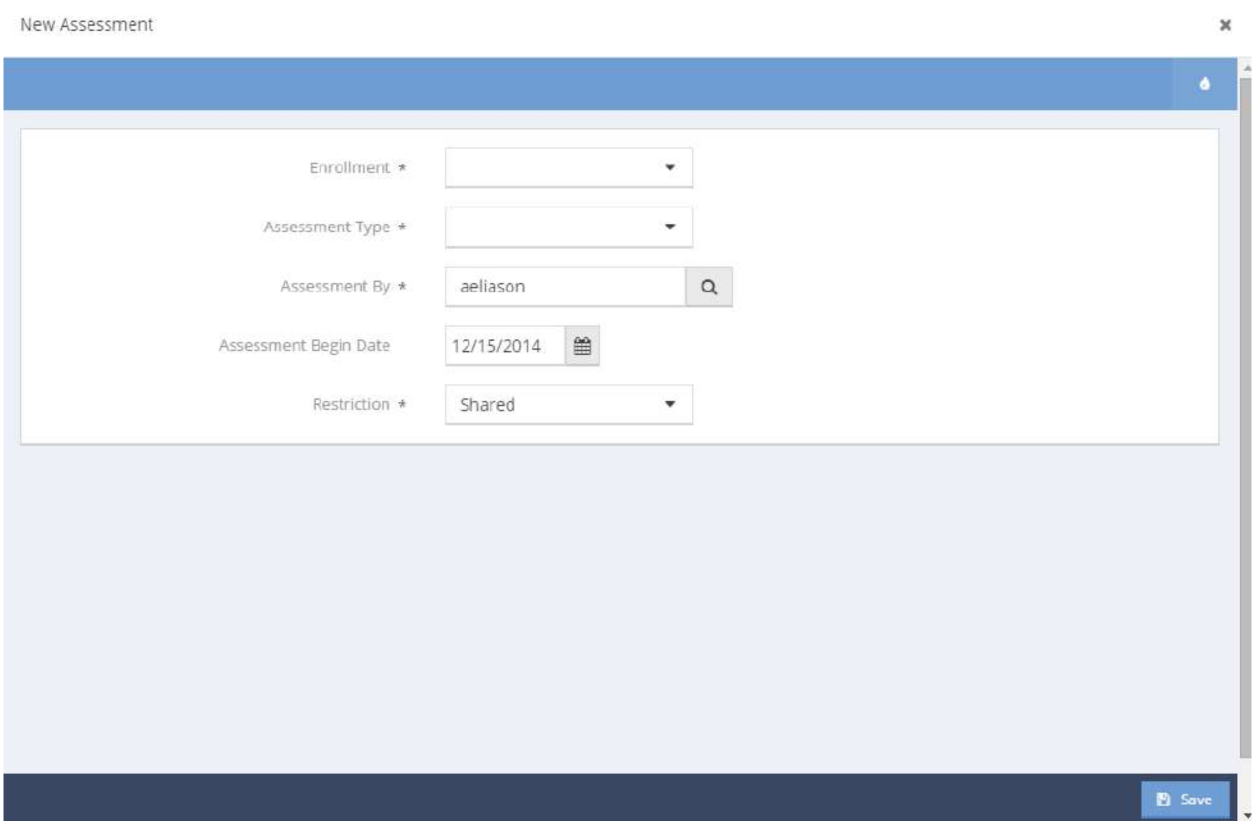
The default value for the Assessment field is “No Assessment Selected”.

Click on the field. The field expands.



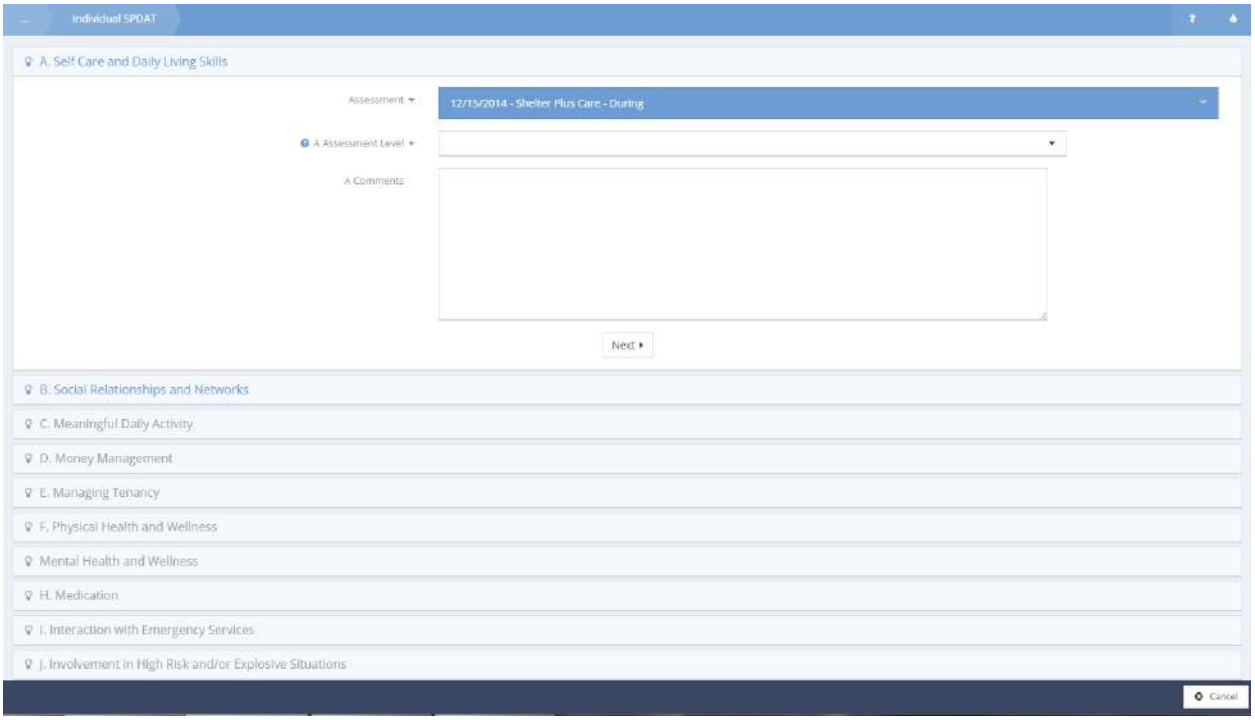
Click on the New Assessment button.

A new window opens.



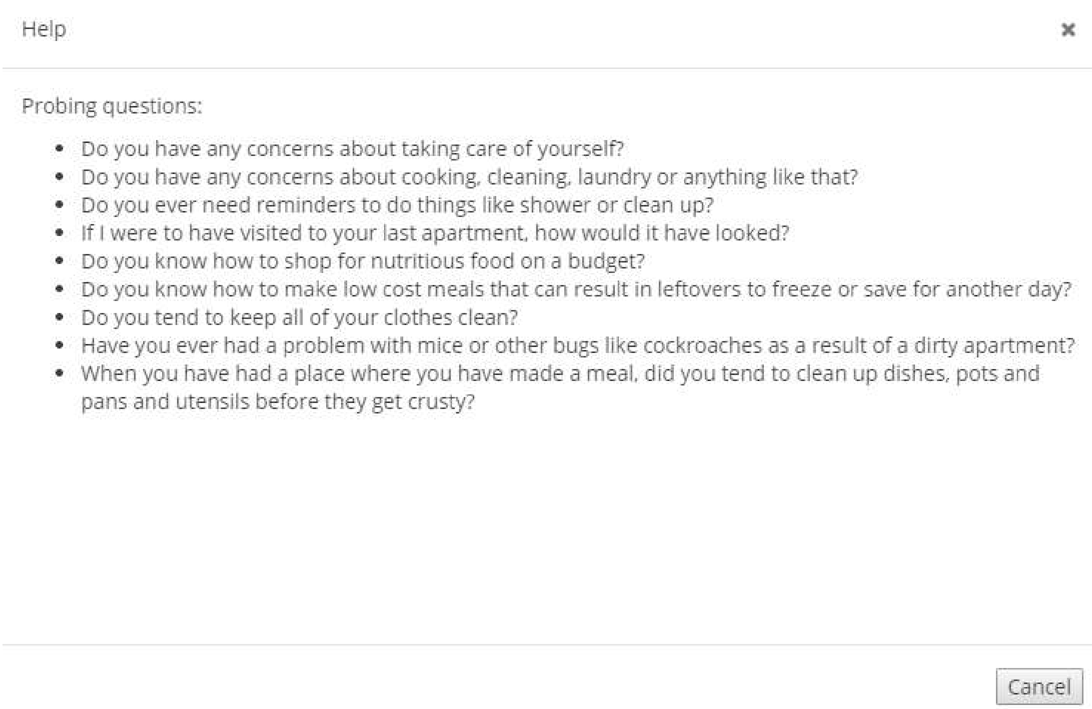
Select the desired Enrollment and Assessment Type. Make any other desired alterations. Click on the Save button.

The Self-Care and Daily Living Skills section of the form expands.

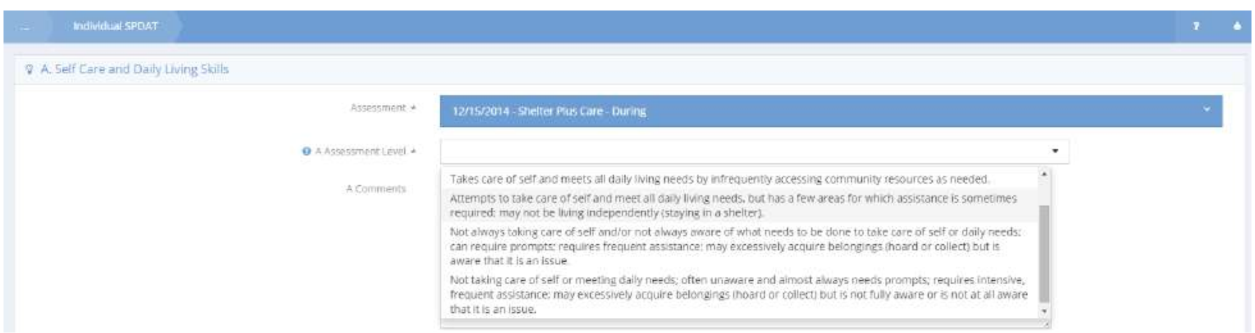


Click on the Help icon.

The probing questions for this section display in a new window.



Ask any or all of the questions to extract enough information from the client to enable the determination of the assessment level for this section. Click on the Cancel button. The questions window closes and the user is returned to the form.



Click on the Assessment Level field. A drop-down list of assessment level descriptions displays. Select the most appropriate description by clicking on it. Enter any desired comments into the comments box and click on the Next ▸ button.

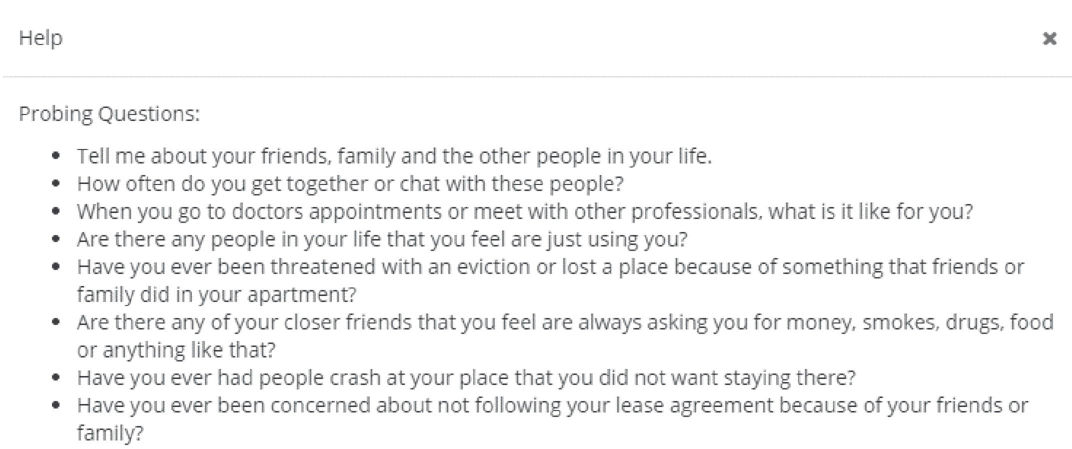
The Self Care and Daily Living Skills section collapses and the Social Relationships and Networks section of the assessment expands.

Click on the Help icon. The probing questions for this section display in a new window.

Ask any or all of the questions to extract enough information from the client to enable the determination of the assessment level for this section. Click on the Cancel button. The questions window closes and the user is returned to the form.

Click on the Assessment Level field. A drop-down list of assessment level descriptions displays. Select the most appropriate description by clicking on it. Enter any desired comments into the comments box and click on the Next button.

The probing questions for each section are presented here.


Help

Probing Questions:

- Tell me about your friends, family and the other people in your life.
- How often do you get together or chat with these people?
- When you go to doctors appointments or meet with other professionals, what is it like for you?
- Are there any people in your life that you feel are just using you?
- Have you ever been threatened with an eviction or lost a place because of something that friends or family did in your apartment?
- Are there any of your closer friends that you feel are always asking you for money, smokes, drugs, food or anything like that?
- Have you ever had people crash at your place that you did not want staying there?
- Have you ever been concerned about not following your lease agreement because of your friends or family?

Meaningful Daily Activity

Help ×

Probing Questions:

- How do you spend your day?
- How do your spend your free time?
- Does that make you feel happy or fulfilled?
- How many days a week would you say you have things to do that make you feel happy or fulfilled?
- How much time in a week would you say that you are totally bored?
- When you wake up in the morning do you tend to have an idea of what you plan to do that day?
- How much time in a week would you say you spend doing stuff to fill up the time rather than doing things that you love?
- Are there any things that get in the way of you doing the sorts of activities you would like to be doing?

Money Management

Help ×

Probing Questions:

- How are you with taking care of money?
- How are you with paying bills on time and taking care of other financial stuff?
- Do you have any street debts?
- Do you have any drug or gambling debts?
- Is there anybody that thinks you owe them money?
- Do you budget every single month for every single thing you need? Including cigarettes? Booze? Drugs?
- Do you try to pay your rent before paying for anything else?
- Are you behind in any payments like child support or student loans or anything like that?

Managing Tenancy

Help ×

Probing Questions:

[For individuals who are housed]

- Do you think that your housing is at risk?
- How is your relationship with your neighbors?
- How have you been doing with taking care of your place?

Physical Health and Wellness

Help ×

Probing Questions:

- How is your health?
- Are you getting any help with your health? How often?
- Do you feel you are getting all the care you need for your health?
- Anything like diabetes, HIV, Hep C or anything like that going on?
- Ever had a doctor tell you that you have problems with your blood pressure or heart or lungs or anything like that?
- When was the last time you saw a doctor? What was that for?
- Do you have a clinic or doctor that you usually go to?
- Anything going on right now with your health that you think would prevent you from living a full, healthy, happy life?

Mental Health and Wellness

Help ×

Probing Questions:

- Have you ever received any help with your mental wellness?
- Have you ever had a conversation with a psychiatrist or psychologist? When was that?
- Do you feel you are getting all the help you might need with whatever mental health stress you might have in your life?
- Have you ever hurt your brain or head?
- When you were in school, did you ever have trouble learning or paying attention? Was any reason given to you for that?
- Was there ever any special testing done on you when you were in school or as a kid?
- Has any doctor ever prescribed you pills for your nerves, anxiety, feeling down or anything like that?
- To the best of your knowledge, when your mother was pregnant with you did she do anything that we now know can have lasting effects on a baby?
- Have you ever gone to an emergency room or stayed in a hospital because you weren't feeling 100% emotionally?

Medication

Help ✖

Probing Questions:

- Do you take any medicines?
- [*If they do*] Were these prescribed by a doctor? To you?
- Have you ever sold some or all of your prescription?
- Have you ever had a doctor prescribe you a medicine that you didn't have filled at a pharmacy or didn't take?
- Were any of your medicines changed in the last month? How did that make you feel?
- Do other people ever steal your medicine?
- Tell me about how you store your medicine and make sure you take the right medication at the right time each day.

Interaction with Emergency Services

Help ✖

Probing Questions:

- How often do you go to emergency rooms?
- How many times have you had the police speak to you over the past six months?
- Have you used an ambulance or needed the fire department at any time in the past 6 months?
- How many times have you called or visited a crises team or a crisis counsellor in the last 6 months?
- How many times have you been admitted to a hospital in the last 6 months? How long did you stay?

Involvement in High-Risk and/or Explosive Situations

Help ✖

Probing Questions:

- Does anybody force or trick you to do anything that you don't want to do?
- Do you ever do stuff that could be considered dangerous like drinking until you pass out outside or delivering drugs for someone or having sex without a condom with a casual partner?
- Do you ever find yourself in situations that may be considered at a high risk for violence?
- Do you ever sleep outside? [*If they do*]Tell me about how you dress and prepare for that? Where do you tend to sleep?
- Do you have any illnesses that may be passed on to others?

Substance Use

Help ✖

Probing Questions:

- Be truthful - when was the last time you had a drink or used drugs?
- Is there anything we should keep in mind related to drugs or alcohol?
- [*If they disclose use of drugs and/or alcohol*] How frequently would you say you use [*specific substance*] in a week?
- In the last little while have you ever drunk so much you passed out?
- Ever get into fights when you drink?
- Ever have a doctor tell you that your health may be at risk in any way when you drink or use drugs?
- Ever fall down and bang your head when drinking or using other drugs?
- Have you ever used alcohol or other drugs in a way that may be considered less than safe?
- Do you ever end up doing things you later regret after you have tied one on?
- Do you ever drink mouthwash or cooking wine or hand sanitizer or anything like that?
- [*If they disclose use of drugs and/or alcohol*] In the last year have you ever had bad stuff that made you feel off?

Abuse and/or Trauma

Help ✖

Probing Questions:

- I don't need you to go into any details that you are not comfortable with, but has there been any point in your life when you experienced emotional, physical, sexual or psychological abuse?
- Are you currently receiving or have you ever received professional assistance to address that abuse?
- Does the experience of abuse or trauma impact your day to day living in any way?
- Does the experience of abuse or trauma impact your ability to hold down a job, maintain housing or engage in meaningful relationships with friends or family?
- Have you ever found yourself feeling or acting in a certain way that you think is caused by a history of abuse or trauma?
- Is your most recent or were any past episodes of homelessness a direct result of experiencing abuse or trauma?

Risk of Personal Harm/Harm to Others

Help ✖

Probing Questions:

- Do you have thoughts about hurting yourself or anyone else?
- Have you ever acted on these thoughts?
- When was the last time?
- What was occurring when you had these feelings or took these actions?
- Have you ever received professional help – including maybe a stay at a hospital – as a result of feeling like hurting or attempting to hurt yourself or others?

Legal

Help ✖

Probing Questions:

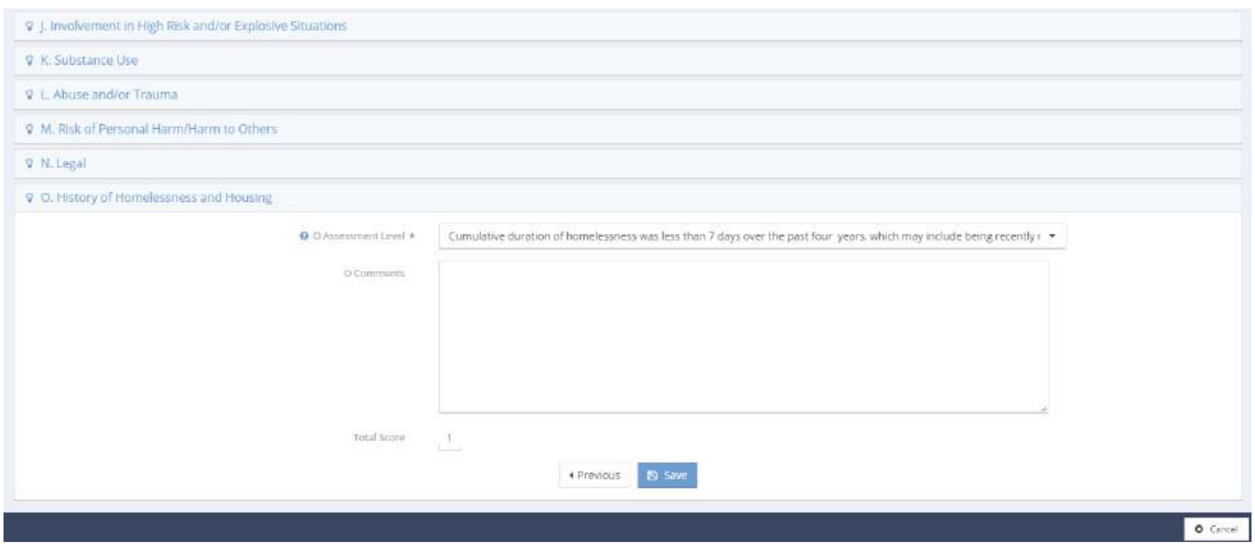
- Do you have any legal stuff going on?
- Have you had a lawyer assigned to you by a court?
- [*If they do*] Do you have any upcoming court dates? Do you think there's a chance you will do time?
- Do you have any involvement with family court or child custody matters?
- Do you have any outstanding fines?
- Have you paid any fines in the last 12 months for anything?
- Have you done any community service in the last 12 months?
- Is anybody expecting you to do community service for anything right now?
- Did you have any legal stuff in the last year that got dismissed?
- Is your housing at risk in any way right now because of legal things?

History of Homelessness and Housing

Help

Probing Questions:

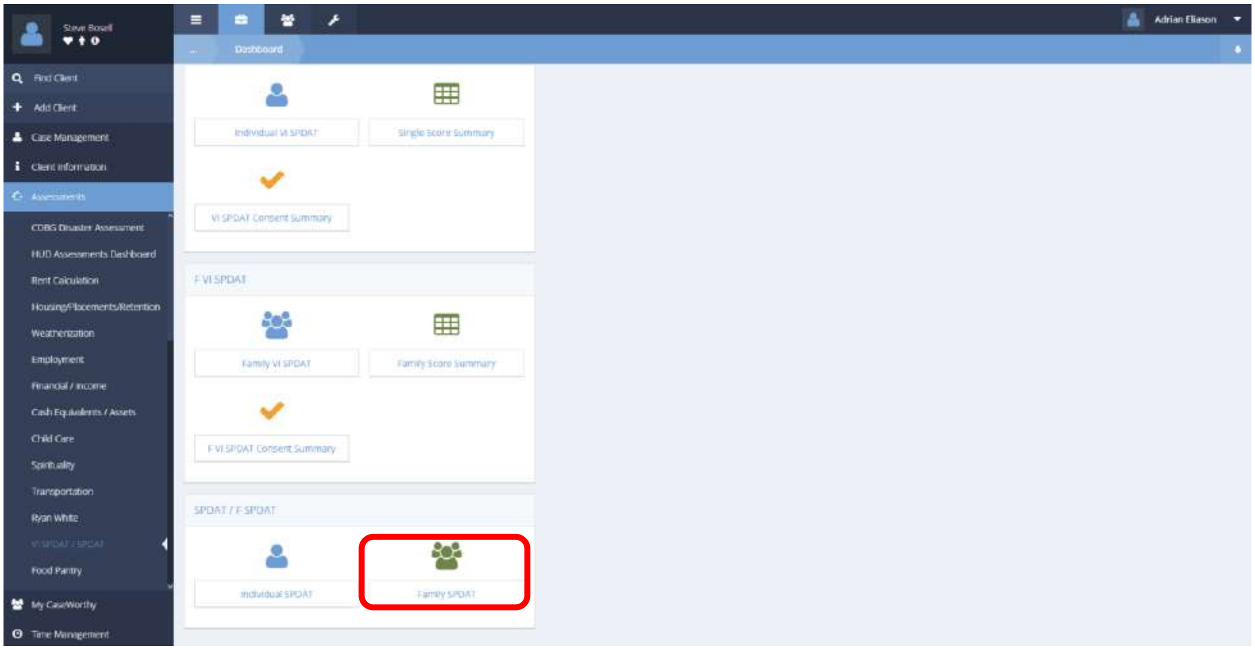
- How long have you been homeless?
- How many times have been homeless in your life other than this most recent time?
- Have you spent any time sleeping on a friend's couch or floor?
- And if so, during those times did you consider that to be your permanent address?
- Have you ever spent time sleeping in a car or alley way or garage or barn or bus shelter or anything like that?
- Have you ever spent time sleeping in an abandoned building?
- Were you ever in a hospital or jail for a period of time when you didn't have a permanent address to go to when you got out?



After completing all sections of the assessment, the SPDAT score appears in the lower left of the form. If finished, click on the Save button. The Individual SPDAT Summary form displays with the just completed assessment listed.

Total Score	Self Care	Relationships	Daily Activity	Money	Tenancy	Physical Wellness	Mental Health	Medication	Emergency Services	Risky Situations	Substance Use	Abuse	Harm Risk	Legal	Housing and Homelessness
1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0

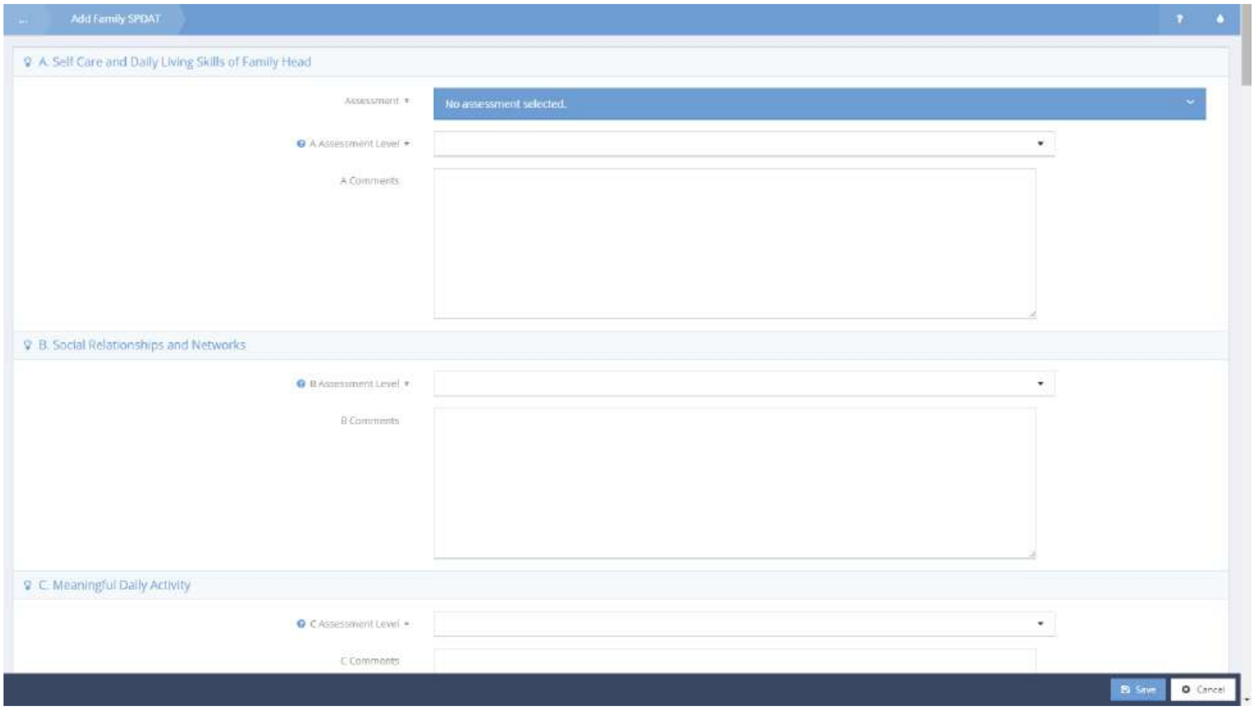
Family SPDAT



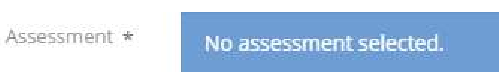
To create a new Family SPDAT assessment, proceed from the dashboard by clicking on the Family SPDAT icon. The Family SPDAT Summary form displays.

To initiate the assessment, click on the Add New button.

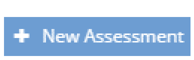
The Family SPDAT Add New form displays.



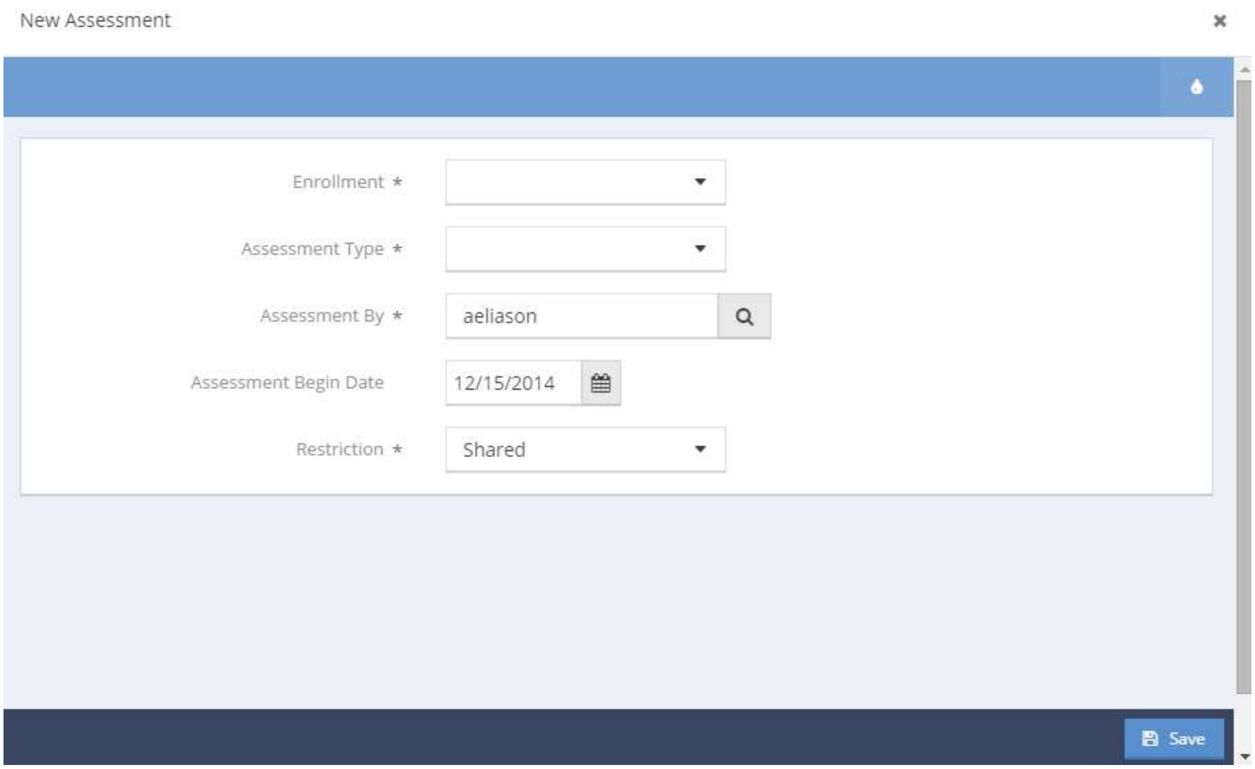
The default value for the Assessment field is "No Assessment Selected".



Click on the field. The field expands.

Click on the  button.

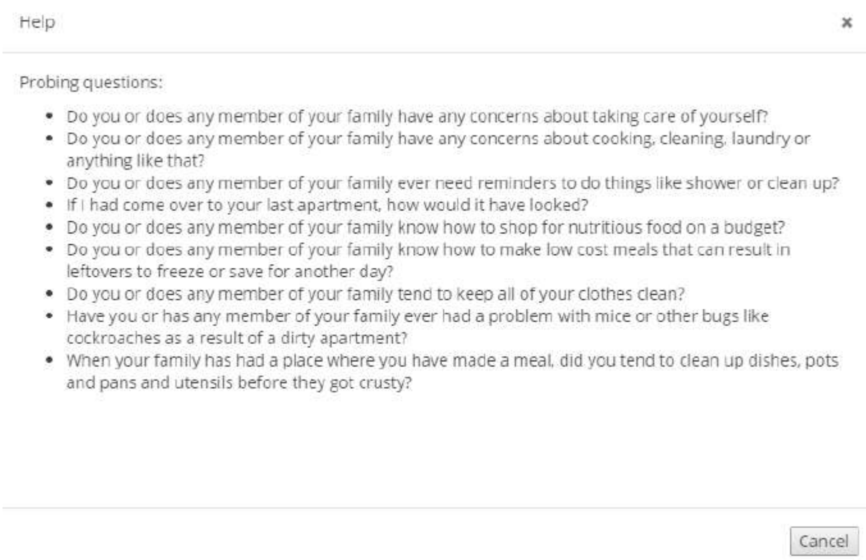
A new window opens.



Select the desired Enrollment and Assessment Type. Make any other desired alterations. Click on the  button. The Self-Care and Daily Living Skills section of the form expands.

Click on the Help  icon.

The probing questions for this section display in a new window.



Ask any or all of the questions to extract enough information from the client to enable the determination of the assessment level for this section. Click on the Cancel button. The questions window closes and the user is returned to the form.

Click on the Assessment Level field. A drop-down list of assessment level descriptions displays. Select the most appropriate description by clicking on it. Enter any desired comments into the comments box.

NOTE: ***Clicking on the Save button at this point results in an error message listing all the incomplete assessment questions. Fill out every section first.***

Click on the Help icon. The probing questions for this section display in a new window.

Ask any or all of the questions to extract enough information from the client to enable the determination of the assessment level for this section. Click on the Cancel button. The questions window closes and the user is returned to the form.

Click on the Assessment Level field. A drop-down list of assessment level descriptions displays. Select the most appropriate description by clicking on it. Enter any desired comments into the comments box and continue to the next section.

The probing questions for each section are presented here.

Help ×

Probing Questions:

- Tell me about your family's friends, extended family and the other people in your life.
- How often does your family get together or chat with these people?
- When you go or any member of your family goes to doctors appointments or meet with other professionals like that, what is that like?
- Are there any people in your family's lives that you feel are just using you?
- Have you or has any member of your family ever been threatened with an eviction or lost a place because of something that friends or family did in your apartment?
- Are there any of your family's closer friends that you feel or always asking you for money, smokes, drugs, food or anything like that?
- Have you or has any member of your family ever had people crash at your place that you did not want staying there?
- Have you or has any member of your family ever been concerned about not following your lease agreement because of your friends or family?

Meaningful Daily Activity

Help ×

Probing Questions:

- How do you and your family spend your day?
- How do your and your family spend your free time?
- Does that make you feel happy or fulfilled?
- How many days a week would you say you and your family have things to do that make you feel happy or fulfilled?
- How much time in a week would you say that you are or any member of your family is totally bored?
- When you and your family wake up in the morning do you tend to have an idea of what you plan to do that day?
- How much time in a week would you say you and your family spend doing stuff to fill up the time rather than doing things that you love?
- Are there any things that get in the way of you and your family doing the sorts of activities you would like to be doing?

Money Management

Help ✖

Probing Questions:

- How are you and your family with taking care of money?
- How are you and your family with paying bills on time and taking care of other financial stuff?
- Do you or does any member of your family have any street debts?
- Do you or does any member of your family have any drug or gambling debts?
- Is there anybody that thinks you or your family owe them money?
- Do you and your family budget every single month for every single thing you need? Including cigarettes? Booze? Drugs?
- Do you and your family try to pay your rent before paying for anything else?
- Are you or is any member of your family behind in any payments like child support or student loans or anything like that?

Managing Tenancy

Help ✖

Probing Questions:

[For families who are housed]

- Do you or does any member of your family think that your housing is at risk?
- How is your family's relationship with your neighbours?
- How have you and your family been doing with taking care of your place?

Physical Health and Wellness

Help ✖

Probing Questions:

- How is your family's health?
- Are you and your family getting any help with your health? How often?
- Do you and your family feel you are getting all the care you need for your health?
- Anything like diabetes, HIV, Hep C or anything like that going on?
- Ever had a doctor tell you or any member of your family that you or they have problems with blood pressure or heart or lungs or anything like that?
- When was the last time you or any member of your family saw a doctor? What was that for?
- Do you and your family have a clinic or doctor that you usually go to?
- Anything going on right now with your family's health that you think would prevent a family member from living a full, healthy, happy life?

Mental Health and Wellness

Help ✖

Probing Questions:

- Have you or has any member of your family ever received any help with mental wellness?
- Have you or has any member of your family ever had a conversation with a psychiatrist or psychologist? When was that?
- Do you feel you and your family are getting all the help you might need with whatever mental health stress you might have in your life?
- Have you or has any member of your family ever hurt their brain or head?
- Have you or has any member of your family ever have trouble learning or paying attention? Was any reason given for that?
- Was there ever any special testing done on you or any member of your family when in school or as a kid?
- Has any doctor ever prescribed you or any member of your family pills for nerves, anxiety, feeling down or anything like that?
- To the best of your knowledge, do you or does any member of your family have any condition that was caused by their mother's actions during pregnancy?
- Have you or has any member of your family ever gone to an emergency room or stayed in a hospital because of not feeling 100% emotionally?

Medication

Help ✖

Probing Questions:

- Do you or does any member of your family take any medicines?
- [If they do] Were these prescribed by a doctor? To that family member?
- Have you or has any member of your family ever sold some or all of a prescription?
- Have you or has any member of your family ever had a doctor prescribe a medicine that you didn't have filled at a pharmacy or didn't take?
- Were any of your family's medicines changed in the last month? How did that make you feel?
- Do other people ever steal your family's medicine?
- Tell me about how you store your family's medicine and make sure the right medications are taken at the right time each day.

Interaction with Emergency Services

Help ✖

Probing Questions:

- How often do you or any member of your family go to emergency rooms?
- How many times have you or any member of your family had the police speak to you over the past six months?
- Have you or has any member of your family used an ambulance or needed the fire department at any time in the past 6 months?
- How many times have you or any member of your family called or visited a crises team or a crisis counsellor in the last 6 months?
- How many times have you or any member of your family been admitted to a hospital in the last 6 months? How long was the stay?

Involvement in High Risk and/or Explosive Situations

Help ✖

Probing Questions:

- Does anybody force or trick you or any member of your family to do something that you don't want to do?
- Do you or does any member of your family ever do stuff that could be considered dangerous like drinking until you pass out outside or delivering drugs for someone or having sex without a condom with a casual partner?
- Do you or does any member of your family ever find yourself or themselves in situations that may be considered at a high risk for violence?
- Do you or does any member of your family ever sleep outside? Tell me about how you dress and prepare for that? Where do you tend to sleep?
- Do you or does any member of your family have any illnesses that may be passed on to others?

Substance Use

Help ✖

Probing Questions:

- Be truthful - when was the last time you or any member of your family had a drink or used drugs?
- Is there anything we should keep in mind related to drugs or alcohol?
- [*If they disclose use of drugs and/or alcohol*] How frequently would you say [*specific family member*] use(s) [*specific substance*] in a week?
- In the last little while have you or has any family member passed out from drinking?
- Do you or does any family member ever get into fights when drinking?
- Has a doctor ever told you or any member of your family that their health may be at risk in any way from drinking or using drugs?
- Have you or has any family member ever fallen down and received a head injury when drinking or using other drugs?
- Have you or has any family member ever used alcohol or other drugs in a way that may be considered less safe?
- Do you or does any family member ever end up doing regrettable things after having tied one on?
- Do you or does any family member ever drink mouthwash or cooking wine or hand sanitizer or anything like that?
- In the last year have you or has any family member ever had bad drugs that made you feel off?

Abuse and/or Trauma of Parents

Help ✖

Probing Questions:

- I don't need you to go into any details that you are not comfortable with, but has there been any point when you or any family member has experienced emotional, physical, sexual or psychological abuse?
- Is professional assistance to address that abuse being received?
- Does the experience of abuse or trauma impact day to day living in any way?
- Does the experience of abuse or trauma impact the ability to hold down a job, maintain housing or engage in meaningful relationships with friends or family?
- Have you or has any family member ever felt or acted in a certain way that you think is caused by a history of abuse or trauma?
- Is your family's most recent or any past episodes of homelessness been a direct result of experiencing abuse or trauma?

Risk of Personal Harm/Harm to Others

Help ✖

Probing Questions:

- Do you or does any family member have thoughts about hurting yourself/themselves or anyone else?
- Have you or has any family member ever acted on these thoughts?
- When was the last time?
- What was occurring during those feelings or when taking those actions?
- Have you or has any family member ever received professional help – including maybe a stay at a hospital – as a result of feeling or attempting to hurt yourself/themselves or others?

Legal

Help ✖

Probing Questions:

- Does your family have any legal stuff going on?
- Have you had a lawyer assigned to you by a court?
- [*If they do*] Does your family have any upcoming court dates? Do you think there's a chance you or any member of your family will do time?
- Does your family have any involvement with family court or child custody matters?
- Do you or does any member of your family have any outstanding fines?
- Have you or has any member of your family paid any fines in the last 12 months for anything?
- Have you or has any member of your family done any community service in the last 12 months?
- Is anybody expecting you or any member of your family to do community service for anything right now?
- Did you or does any member of your family have any legal stuff in the last year that got dismissed?
- Is your housing at risk in any way right now because of legal things?

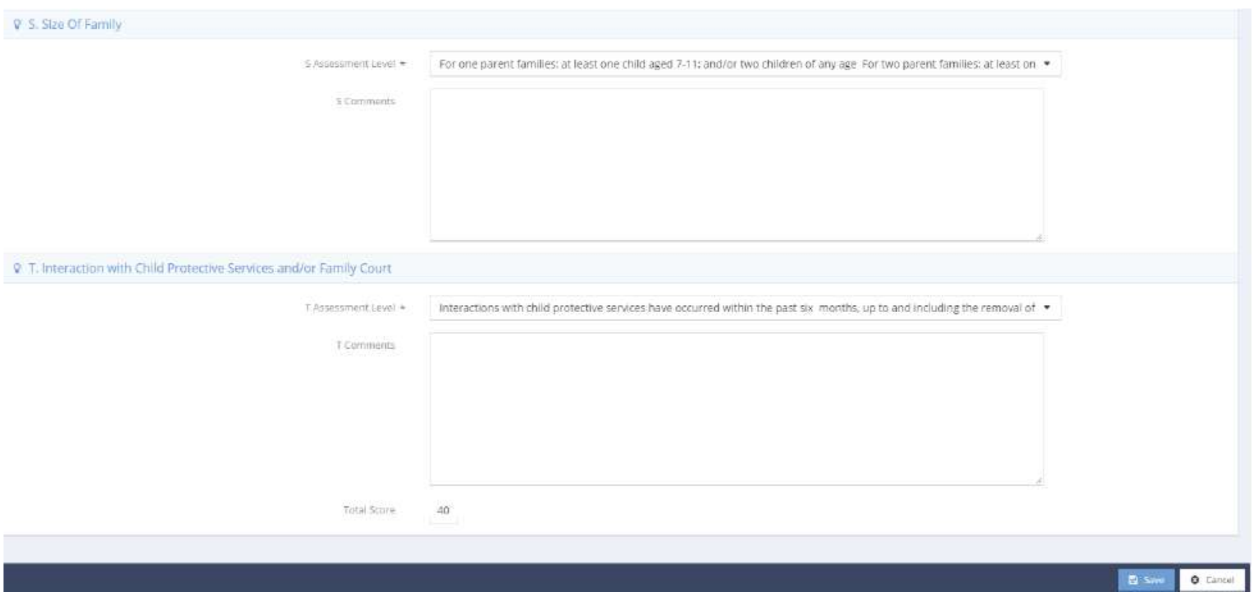
History of Homelessness and Housing

Help

Probing Questions:

- How long has your family been homeless?
- How many times has your family been homeless other than this most recent time?
- Has your family spent any time sleeping on a friend's couch or floor?
- And if so, during those times did you consider that to be your family's permanent address?
- Has your family ever spent time sleeping in a car or alley way or garage or barn or bus shelter or anything like that?
- Has your family ever spent time sleeping in an abandoned building?
- Were you or was any member of your family ever in a hospital or jail for a period of time when you didn't have a permanent address to go to when released?

The sections entitled Parental Engagement, Stability and Resiliency of Family Unit, Needs Of Children, Size Of Family and Interaction with Child Protective Services and/or Family Court have no probing questions help screen.



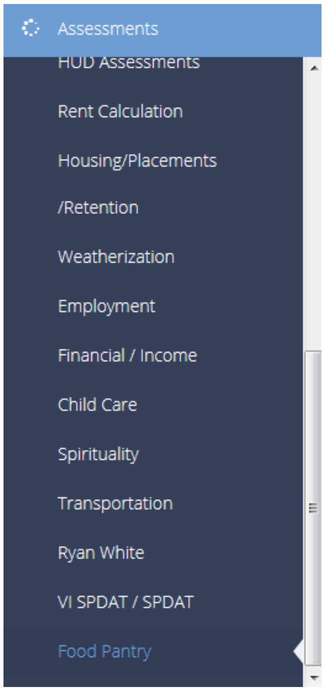
After completing all sections of the assessment, the Family SPDAT score appears in the lower left of the form. If finished, click on the Save button. The Family SPDAT Summary form displays with the just completed assessment listed.

Family SPDAT Summary

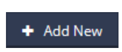
+ Add New

Total Score	Type	Self Care	Relationships	Daily Activity	Money	Tenancy	Physical Wellness	Mental Health	Medication	Emergency Services	Risky Situations	Substance Use	Abuse	Harm Risk	Legal	Housing and Homelessness	Parental Engagement	Stability of Family Unit	Needs Of Children	Size Of Family
40	Family	0	0	2	0	1	4	1	3	2	3	1	4	1	3	2	2	3	2	3

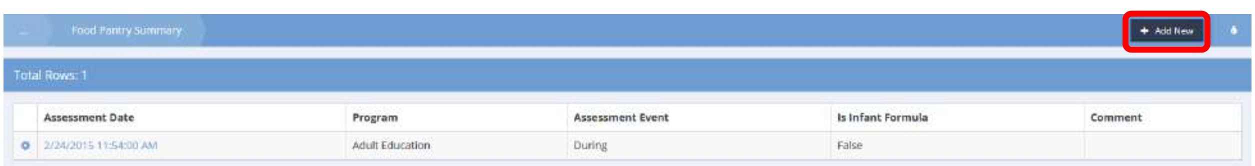
Food Pantry



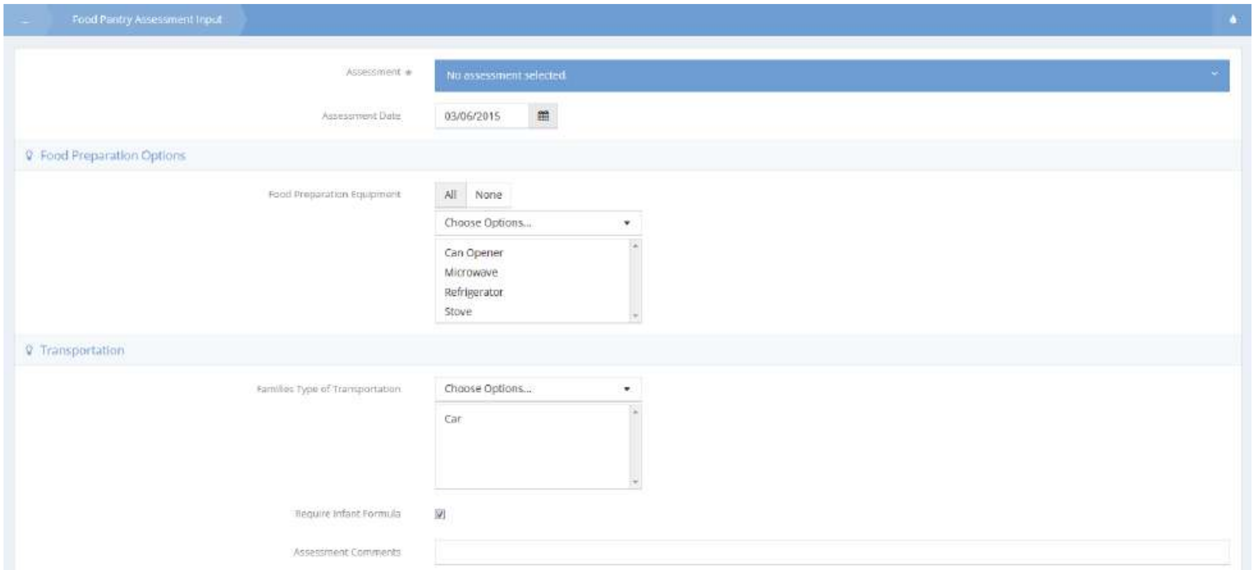
The last menu item in the Assessments menu group is the Food Pantry Assessment. The Food Pantry assessment collects information that assists staff in creating food boxes that are appropriate for the family's needs and manageable to transport.

To add a new assessment, click the 

button on the summary form.



On the assessment input form, enter all required/relevant information then save the form.

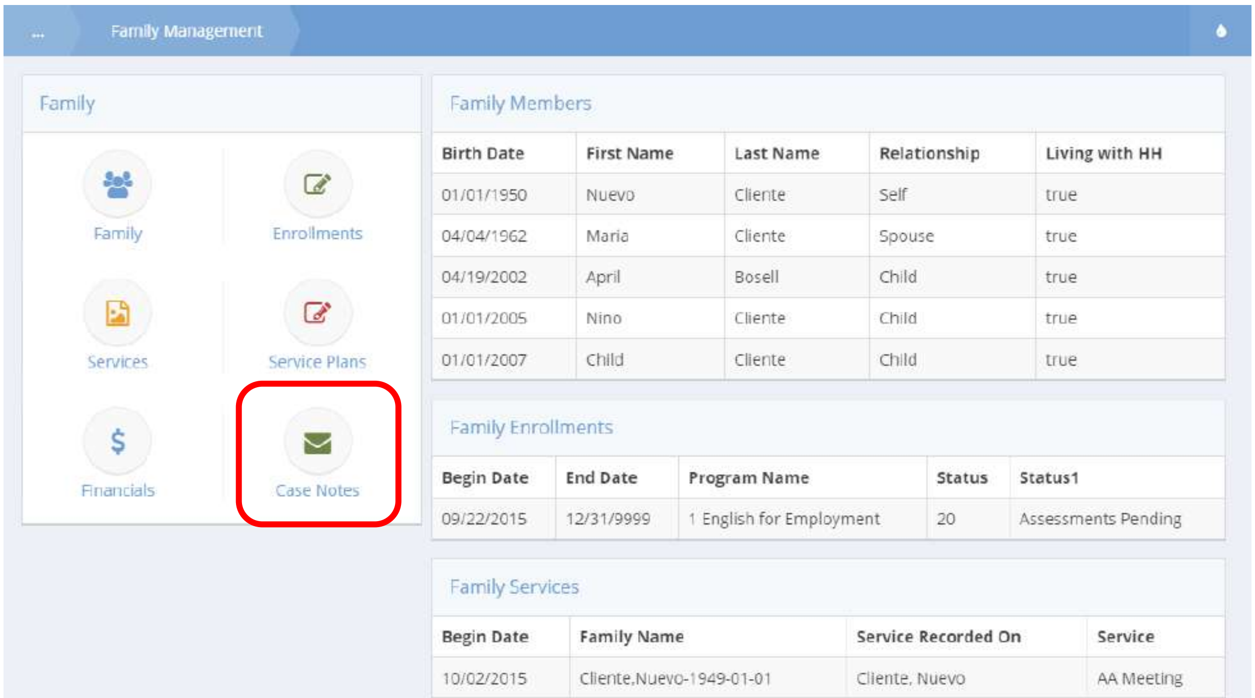

Food Pantry Assessment Input
Assessment
No assessment selected
Assessment Date
03/06/2015
Food Preparation Options
Food Preparation Equipment
All
None
Choose Options...
Can Opener
Microwave
Refrigerator
Stove
Transportation
Families Type of Transportation
Choose Options...
Car
Require Infant Formula
Assessment Comments

Family

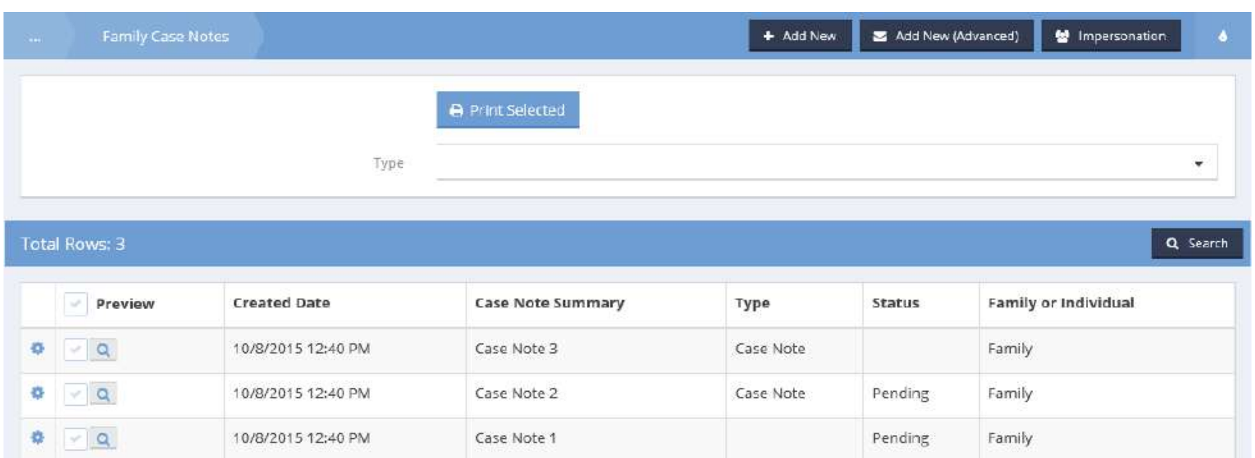
Family Case Notes

Objective: Access family-specific case notes.

Navigation: Case Management>Family



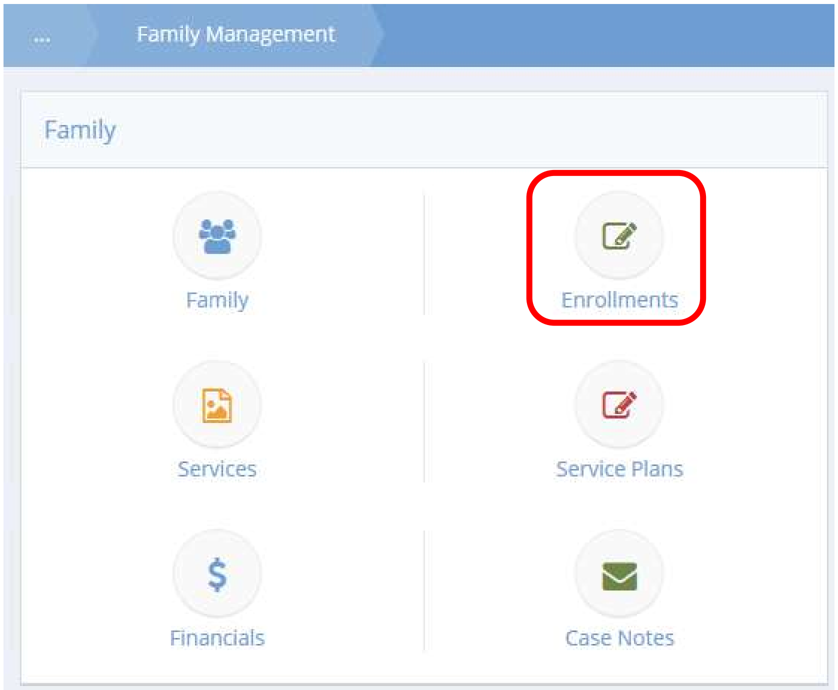
Click the icon for Case Notes. The Family Case Notes form displays all existing family case notes.



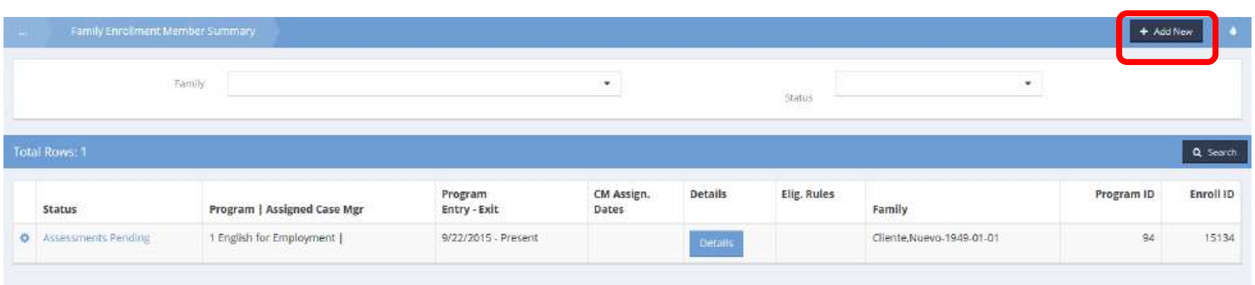
Family Enrollment Member Summary

Objective: Enroll a family in a program or view existing enrollments.

Navigation: Case Management>Family

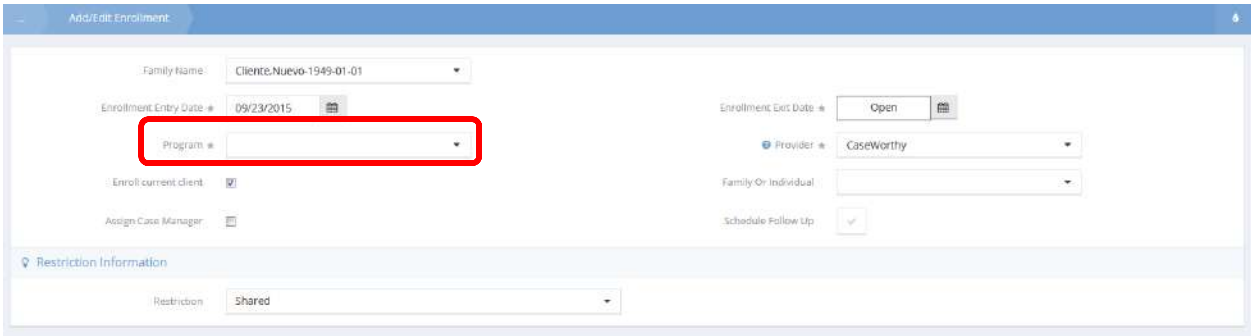


Click the Enrollments icon. The Family Enrollment Member Summary form displays all existing enrollments for the family.



To add a new enrollment, click the + Add New button.

The Add/Edit Enrollment form displays.



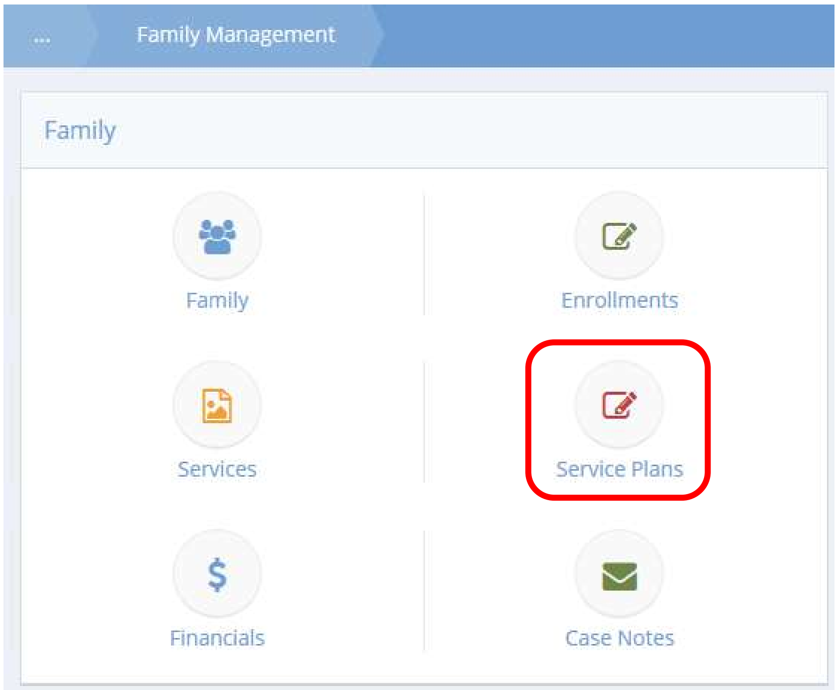
Select a program from the drop-down list and edit any other fields as desired for the enrollment. Click 

when finished.

Family Service Plan Summary

Objective: View any existing family service plans.

Navigation: Case Management>Family



Click the Service Plans icon. The Family Service Plan Summary displays all existing service plans for the family.

Click on the action gear icon associated with the desired service plan and select the appropriate pop up menu selection to edit, manage goals and steps, view notes, manage outcomes, review plan history or run the service plan report.

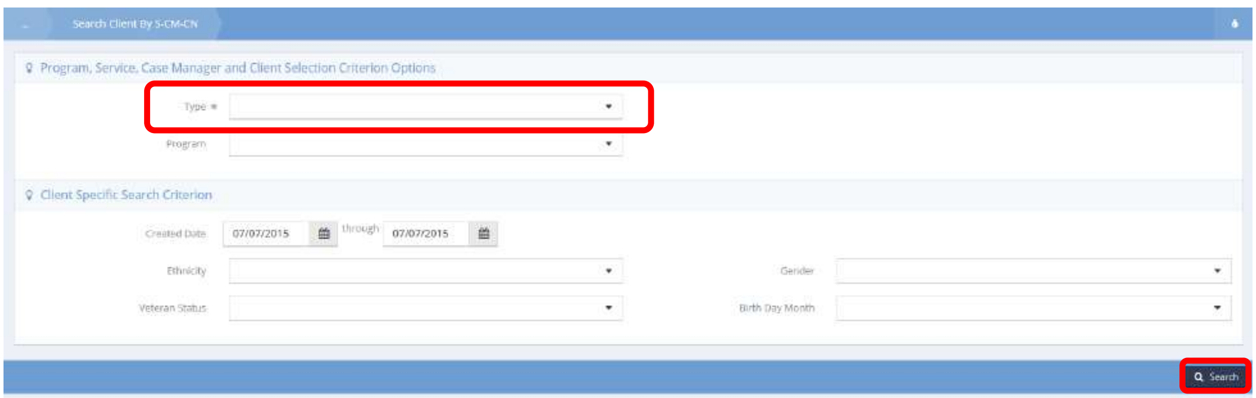
My CaseWorthy

The My CaseWorthy menu has tools and functionality that supports the Case Manager in managing their case load. The links to forms and screens in this area are user-specific rather than client-specific as in the three previous menu areas. The case manager can view client activities across their caseload rather than navigating to multiple client records.

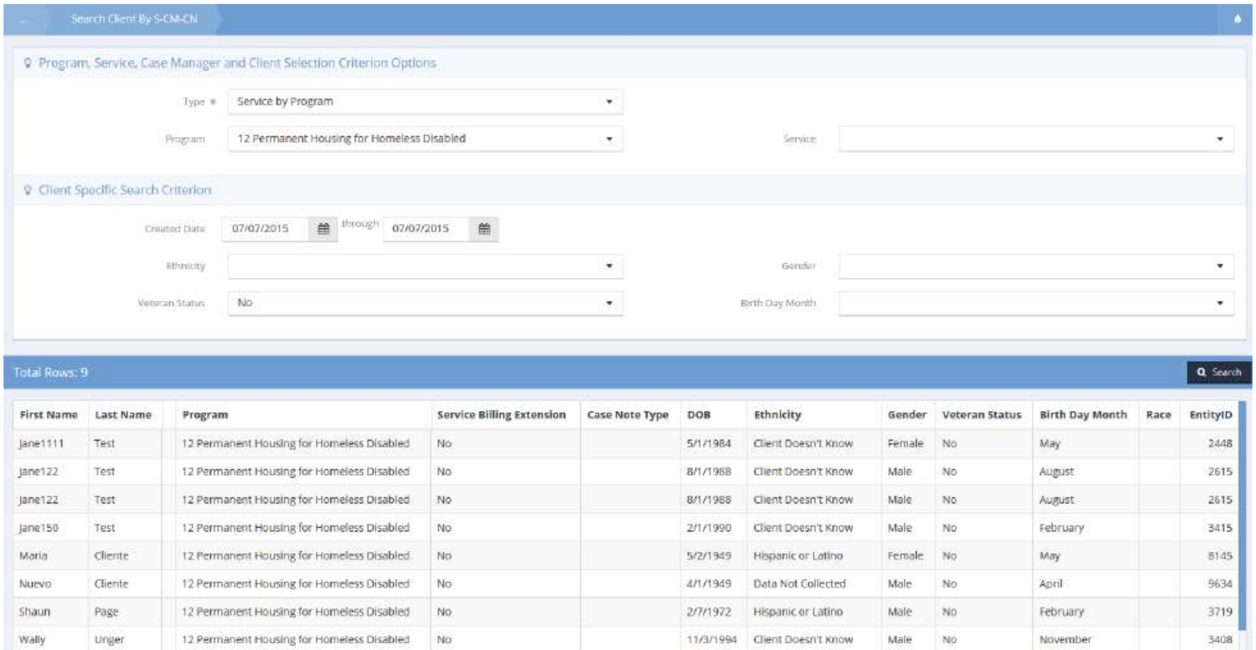
Client Activity Search

Search Client By S-CM-CN

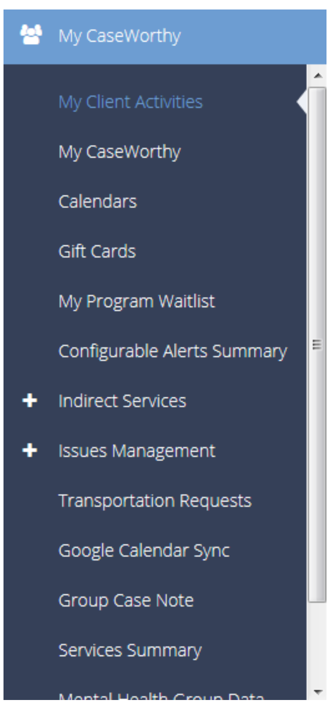
Objective: Search clients by services, case manager, or case note type.



Select a Type from the drop-down list. Use any of the other drop-down lists to filter results and then click the Search button. All clients that fulfill the search criteria display in the spreadsheet below.



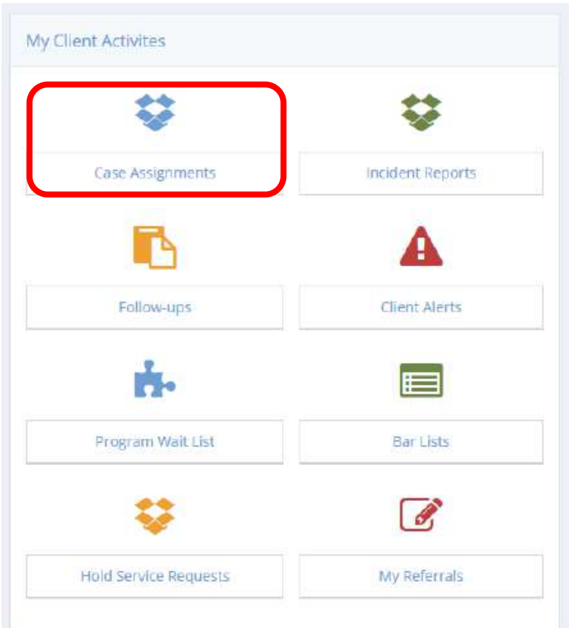
My Client Activities



The first menu item in the My CaseWorthy menu group is the "My Client Activities" dashboard. Here, a user can access various information related to the clients to whom they are assigned as a case manager.

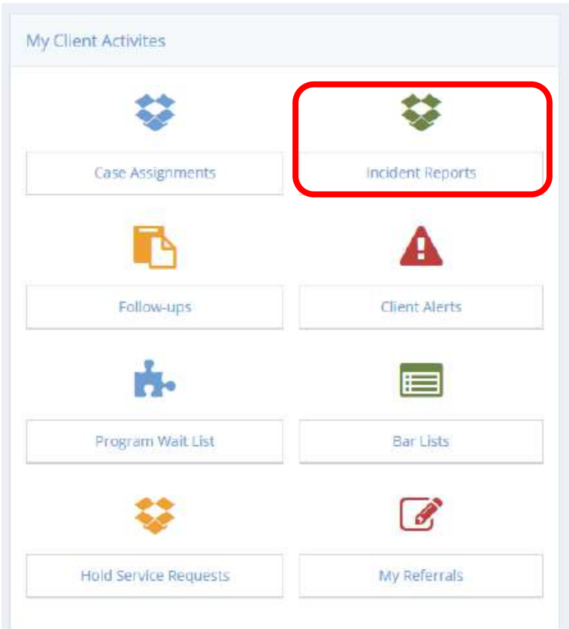
My Client Activities

Case Assignments



Clicking the "Case Assignments" icon opens the case assignments summary form. This form displays all of a case manager's clients as well as the programs they are associated with. Click on the program name hyperlink to navigate to the enrollment summary form.

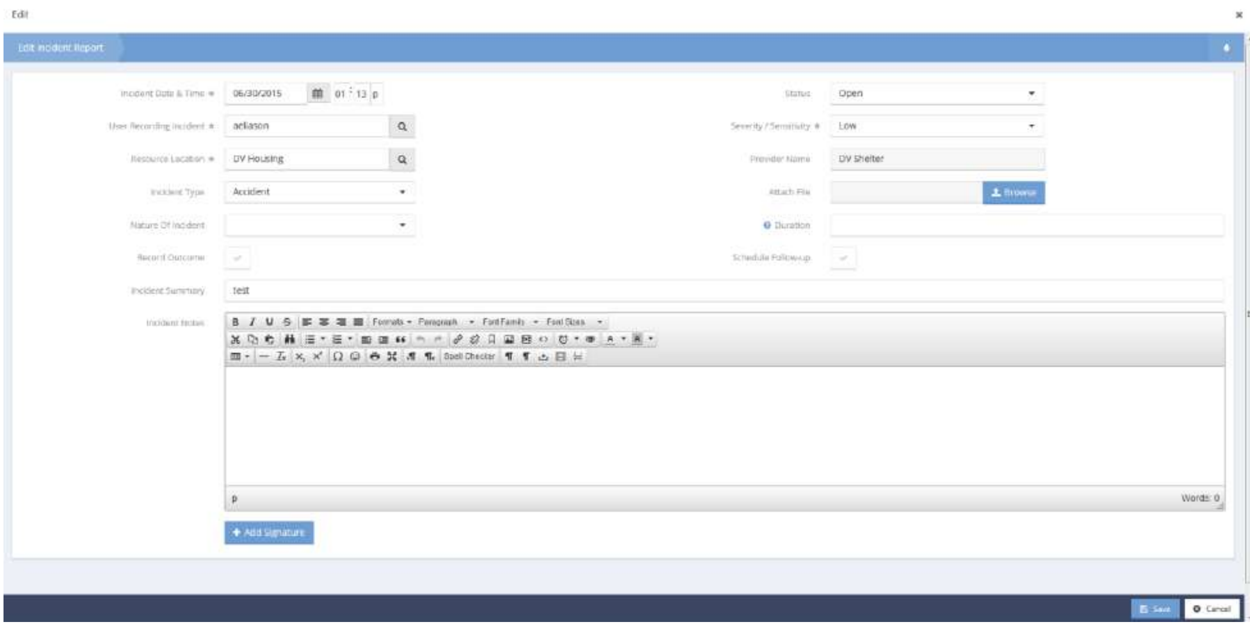
Incident Reports



Click the icon for Incident Reports. The My Client Incident Participants form displays.

Click the action gear icon for the desired entry and click Edit.

The Edit Incident Report form displays.



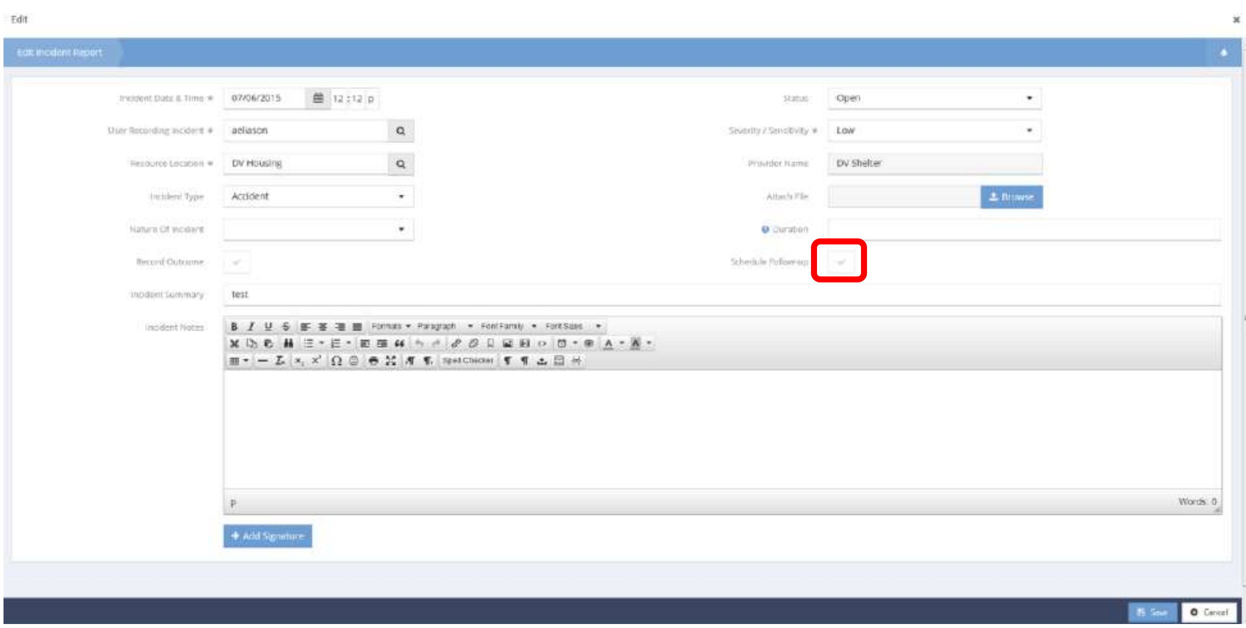
Make any desired changes and click Save when finished.

Incident Report Follow-Up

Objective: Create follow-ups for incident reports.

From the My Client Incident Participants form, on the desired client incident, click the action gear icon associated with it and select Edit from the popup menu that appears.

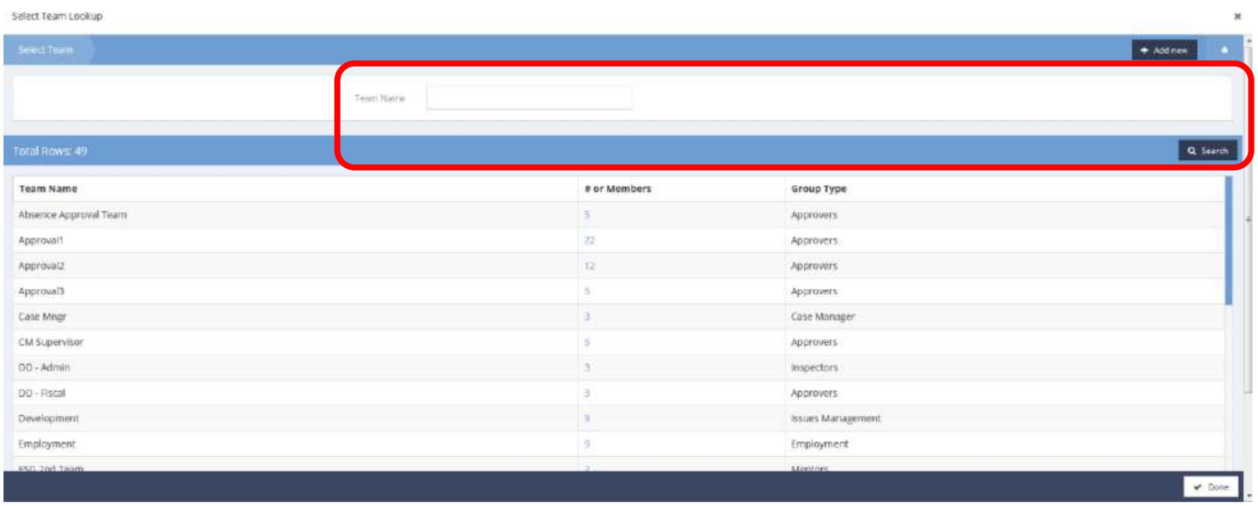
The Edit Incident Report form displays. Click the checkbox icon for Schedule Follow-up.



The Add Employment Followup form displays.

Click the magnifying glass lookup icon for Assigned Team.

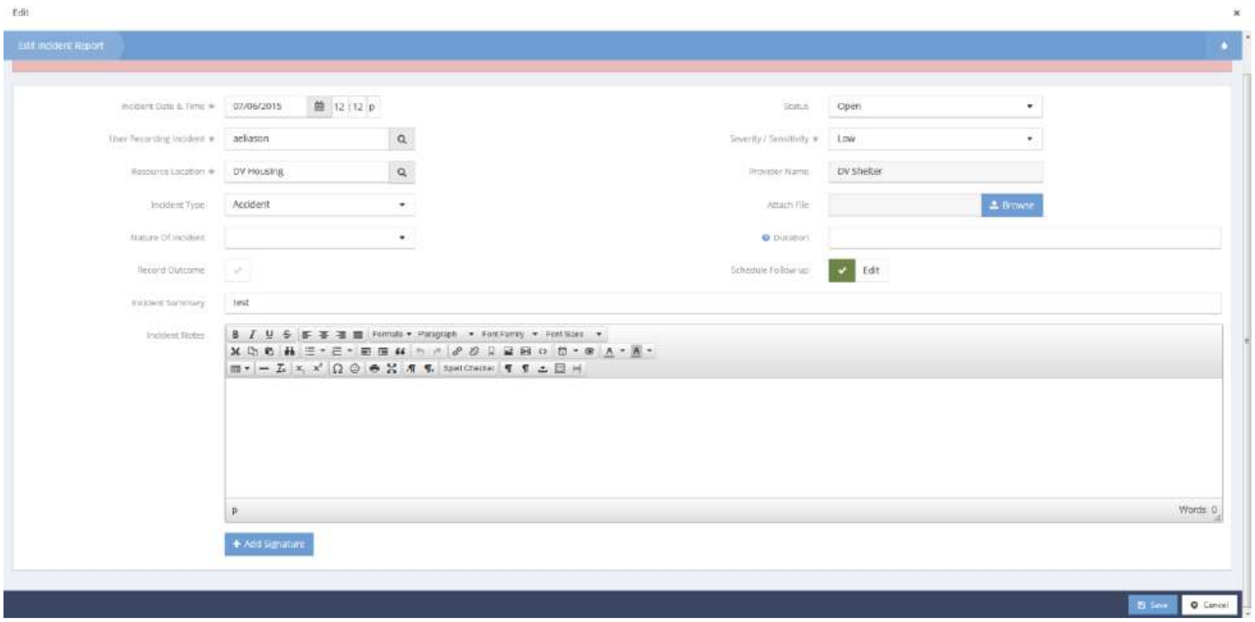
The Select Team Lookup form displays.



Select the desired team from the list. Use the search bar to filter team names if desired.

The Assigned Team field updates with the selected team. Select a Team Member if desired and modify any other fields as desired. Click Update when finished.

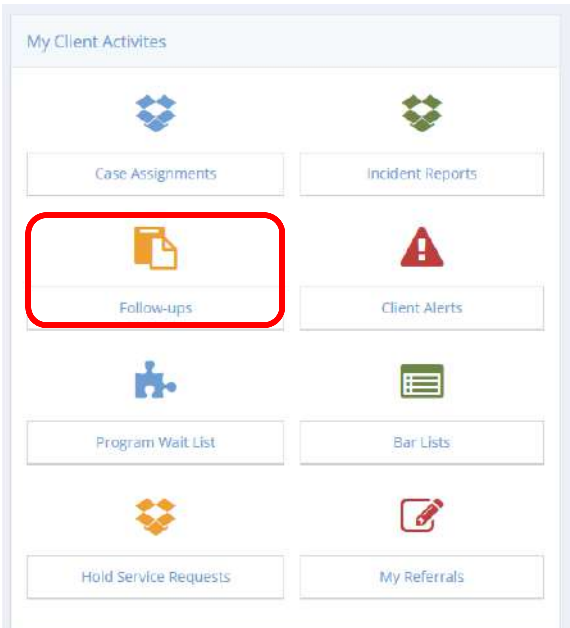
The Edit Incident form displays with the Schedule Follow-up checkbox now indicating that it has been completed.



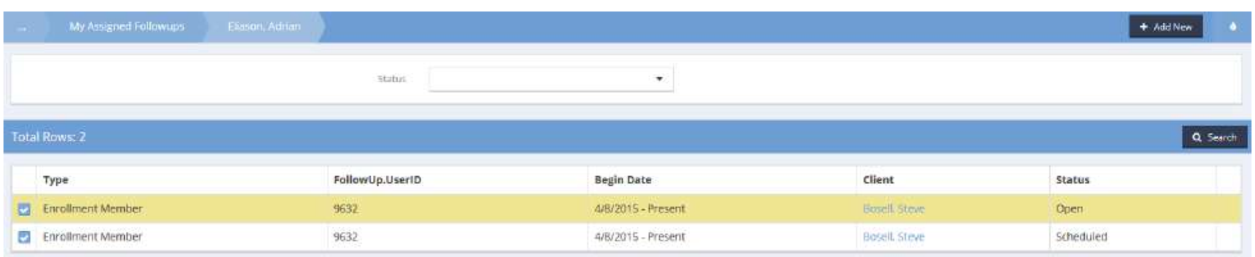
Click Save to finish editing the incident report.

Follow Ups

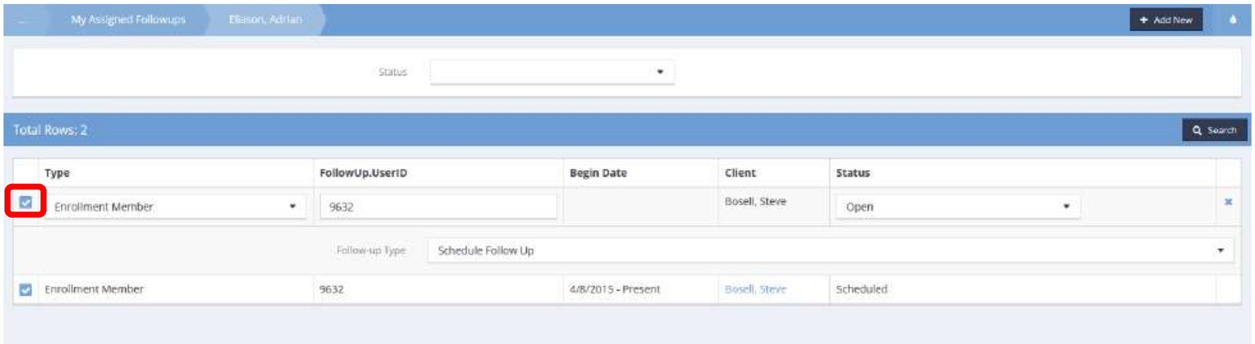
From the 'My Client Activities' Menu on the 'My Client Activities' dashboard, select 'Follow-ups.



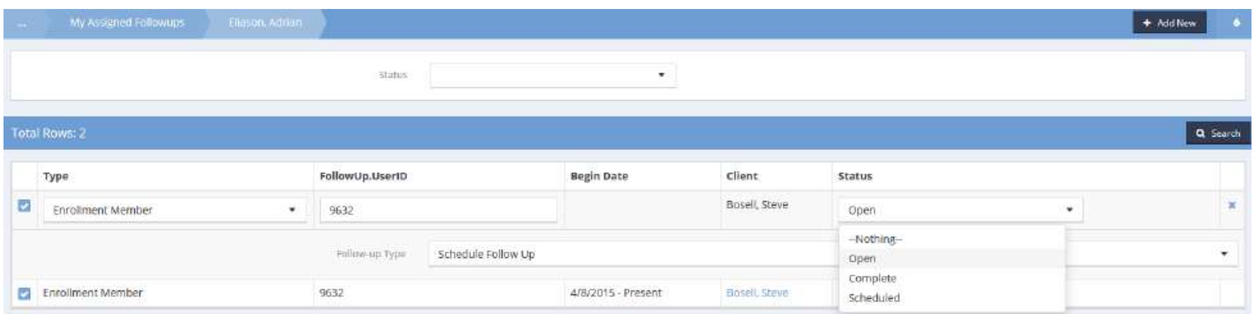
The 'My Assigned Follow-ups' form displays.



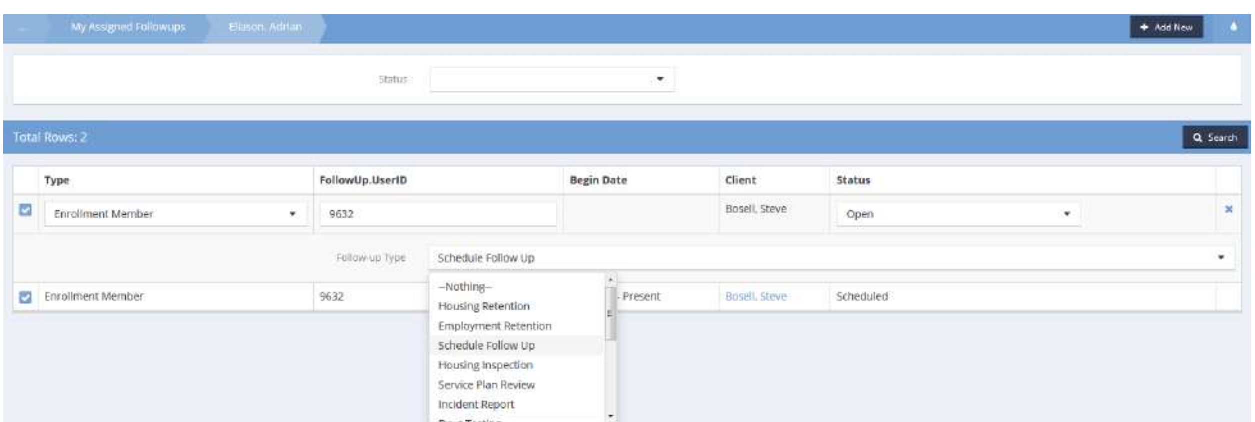
Select the desired follow-up task by clicking on the checkbox to the left of the follow-up line.



The follow-up expands to allow editing.



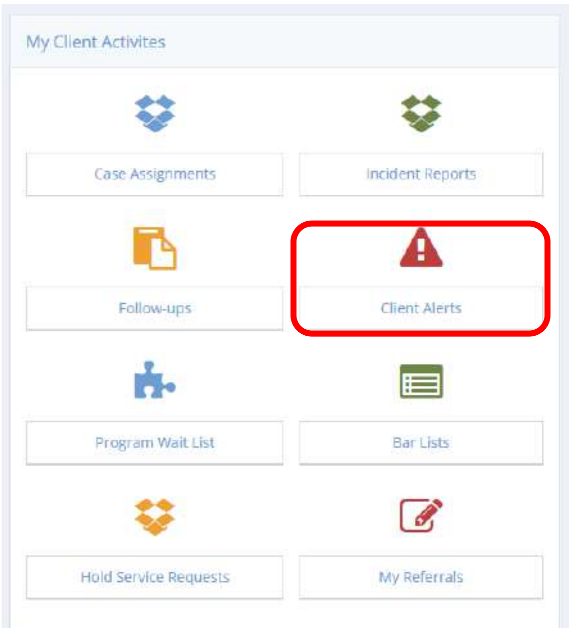
As desired, select from the drop-down lists for Status and Follow-up Type.



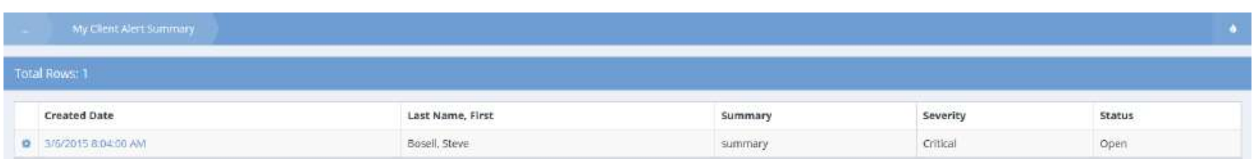
Make any other changes desired and click the 

button. Select ‘Follow-ups’ from the menu again to see any changes in the table listing.

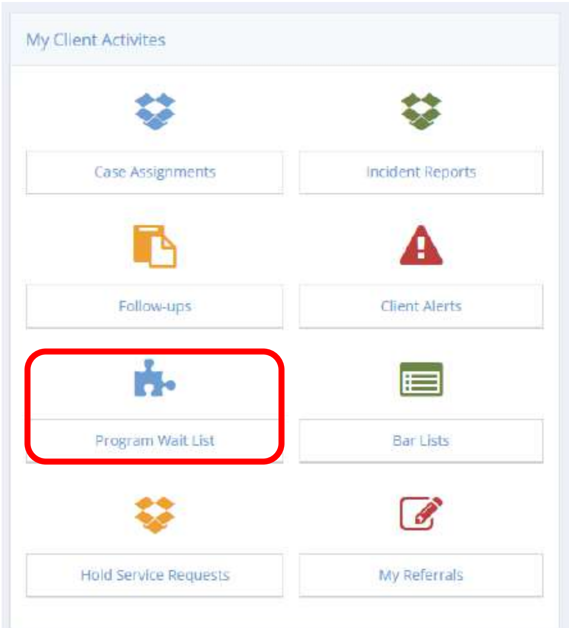
Client Alerts



Clicking the "Client Alerts" icon opens the client alerts summary form. This form displays alerts associated with all of a case manager’s clients.

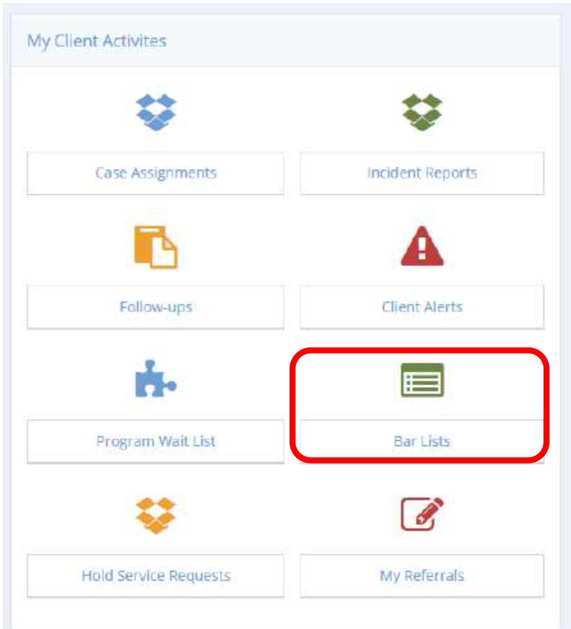


Program Wait List



Clicking the "Program Wait List" opens the program waitlist summary form. This form displays all of a case manager's clients who have been placed on a wait list, along with the respective waitlist they are on. The list can be sorted by status, if needed.

Bar List

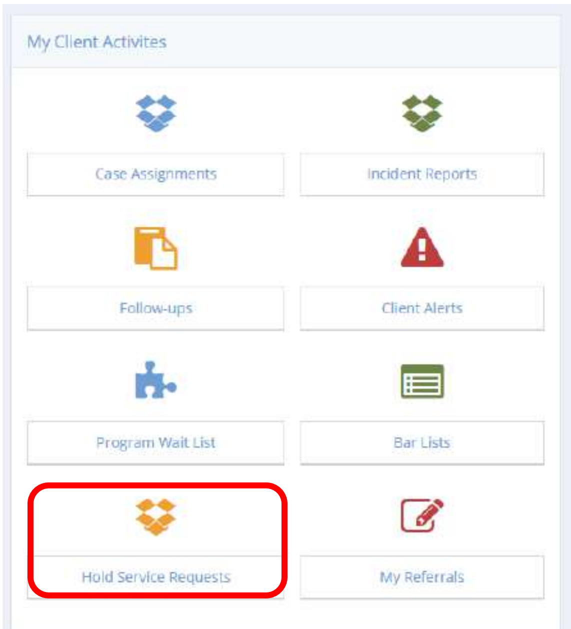


Clicking the "Bar List" icon opens the bar list summary form. This form displays all of a case manager's clients who have been barred from a program or service.

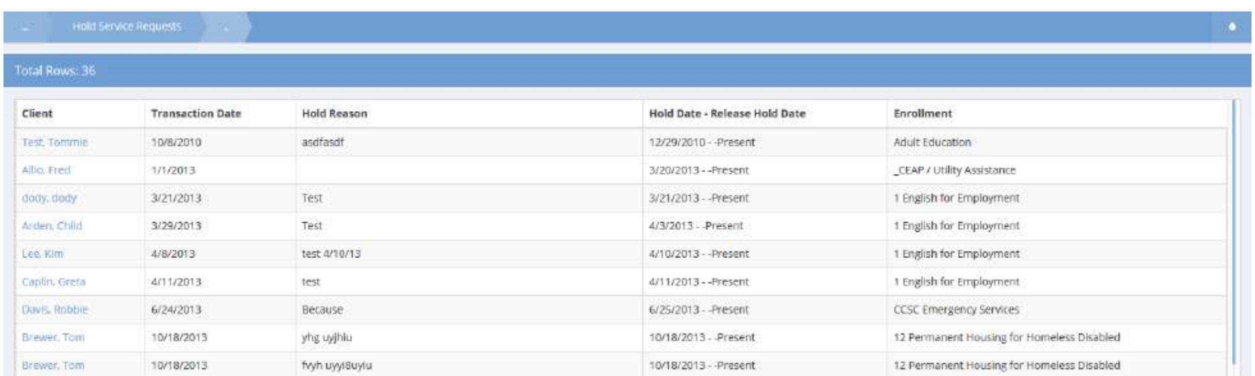
Client	Barred From	Type (Prog/Svc)	Begin Date - End Date	Reason
Bosell, Steve	CC Adoption	Program	5/7/2015 - Present	Drunk Only
Bosell, Steve	CC Asset Development	Program	5/7/2015 - Present	Fighting - Agressor/Provoker

Hold Service Requests

Click on the Hold Service Requests icon in the My Client Activities window.



The Hold Service Requests form displays a list of service requests on hold.

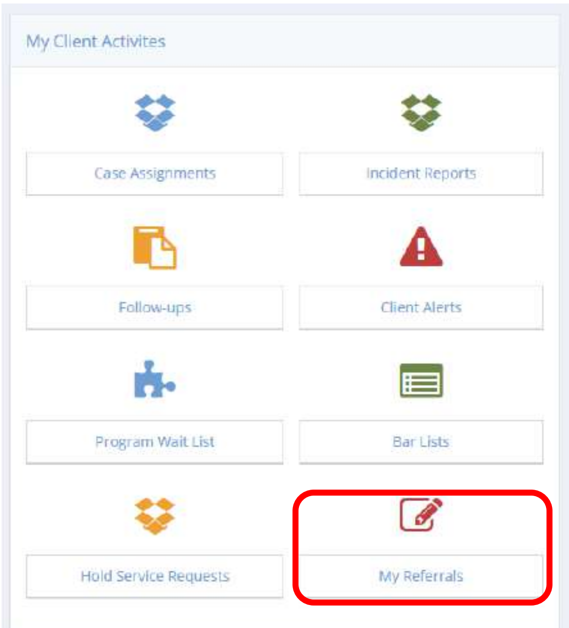

Hold Service Requests

Total Rows: 36

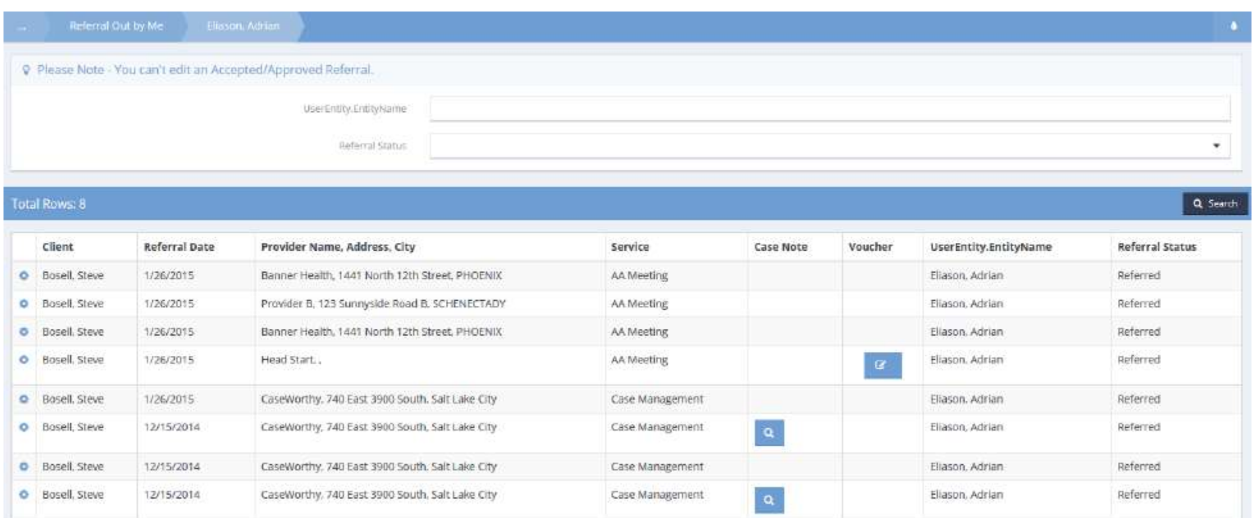
Client	Transaction Date	Hold Reason	Hold Date - Release Hold Date	Enrollment
Test, Tommie	10/8/2010	asdfasdf	12/29/2010 - -Present	Adult Education
Allio, Fred	1/1/2013		3/20/2013 - -Present	_CEAP / Utility Assistance
dody, dody	3/21/2013	Test	3/21/2013 - -Present	1 English for Employment
Arden, Child	3/29/2013	Test	4/3/2013 - -Present	1 English for Employment
Lee, Kim	4/8/2013	test 4/10/13	4/10/2013 - -Present	1 English for Employment
Caplin, Greta	4/11/2013	test	4/11/2013 - -Present	1 English for Employment
Davis, Robbie	6/24/2013	Because	6/25/2013 - -Present	CCSC Emergency Services
Brewer, Tom	10/18/2013	yhg uyjhlu	10/18/2013 - -Present	12 Permanent Housing for Homeless Disabled
Brewer, Tom	10/18/2013	fvyh uyyi8uyiu	10/18/2013 - -Present	12 Permanent Housing for Homeless Disabled

Referrals

Click on the My Referrals icon in the My Client Activities window.



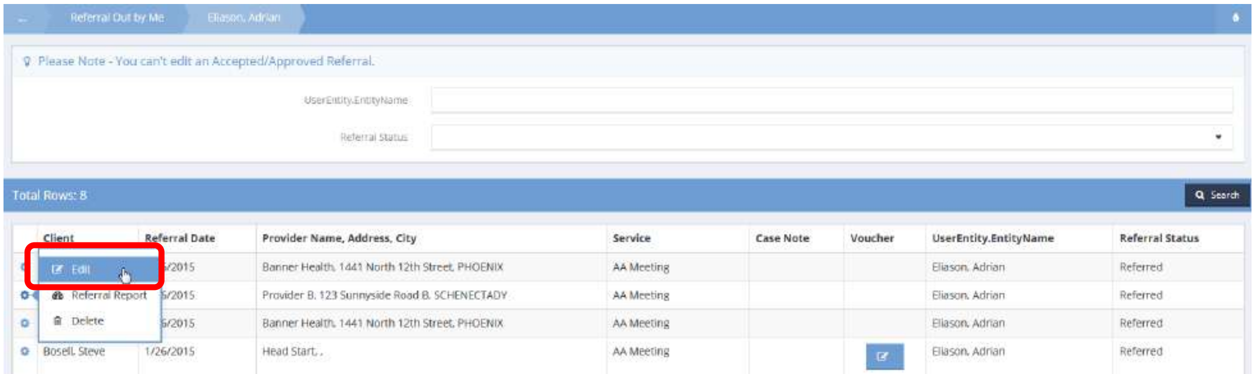
The Referral Out by Me form displays.



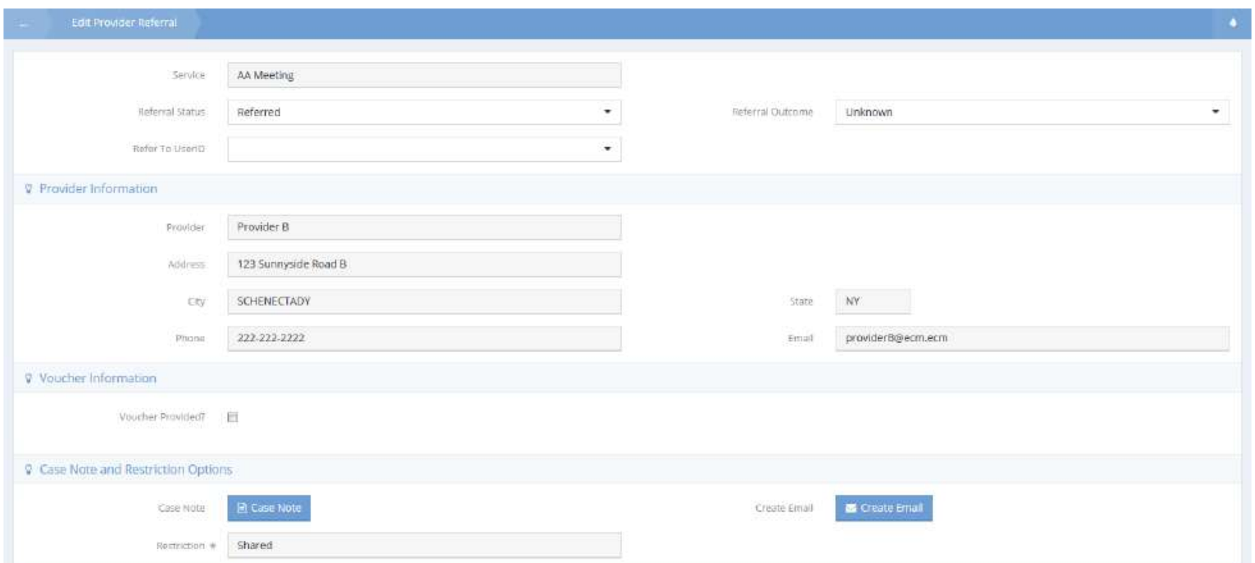
Client	Referral Date	Provider Name, Address, City	Service	Case Note	Voucher	UserEntity.EntityName	Referral Status
Bosell, Steve	1/26/2015	Banner Health, 1441 North 12th Street, PHOENIX	AA Meeting			Eliason, Adrian	Referred
Bosell, Steve	1/26/2015	Provider B, 123 Sunnyside Road B, SCHENECTADY	AA Meeting			Eliason, Adrian	Referred
Bosell, Steve	1/26/2015	Banner Health, 1441 North 12th Street, PHOENIX	AA Meeting			Eliason, Adrian	Referred
Bosell, Steve	1/26/2015	Head Start, ,	AA Meeting			Eliason, Adrian	Referred
Bosell, Steve	1/26/2015	CaseWorthy, 740 East 3900 South, Salt Lake City	Case Management			Eliason, Adrian	Referred
Bosell, Steve	12/15/2014	CaseWorthy, 740 East 3900 South, Salt Lake City	Case Management			Eliason, Adrian	Referred
Bosell, Steve	12/15/2014	CaseWorthy, 740 East 3900 South, Salt Lake City	Case Management			Eliason, Adrian	Referred
Bosell, Steve	12/15/2014	CaseWorthy, 740 East 3900 South, Salt Lake City	Case Management			Eliason, Adrian	Referred

Locate the desired referral and click on the action gear associated with it.

To edit a referral, select Edit from the pop-up menu that appears.



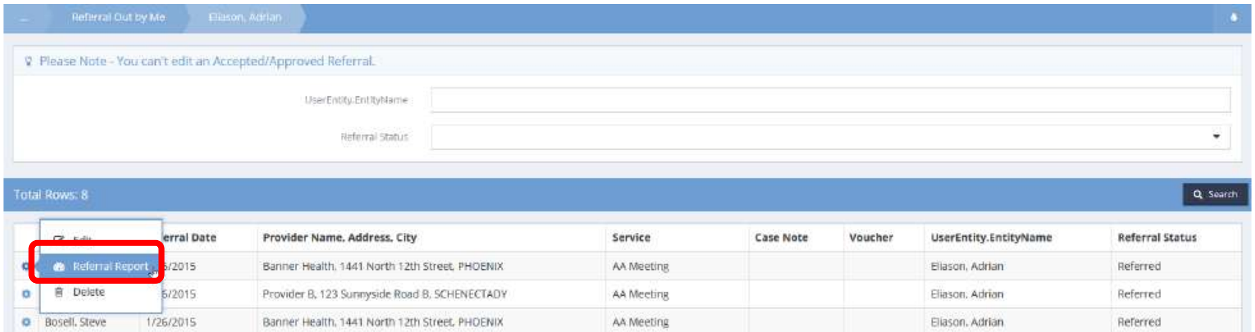
The Edit Provider Referral form displays.



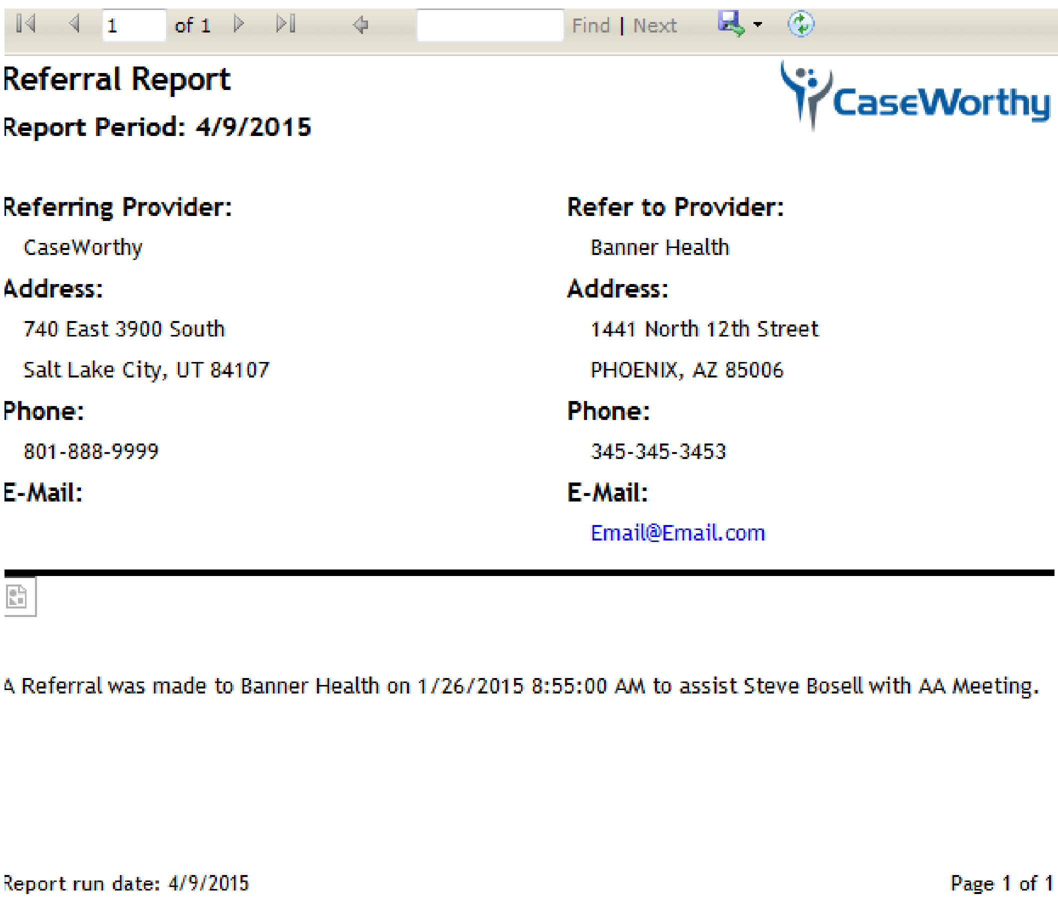
Make any desired changes and click on the 

button.

To create a referral report, select Referral Report from the pop-up menu.



The Referral Report opens in a new window.



1 of 1 Find | Next

Referral Report

Report Period: 4/9/2015

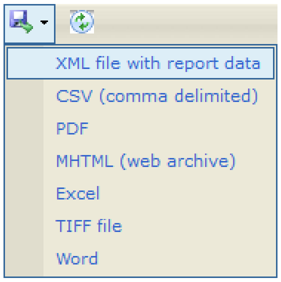
Referring Provider:
CaseWorthy
Address:
740 East 3900 South
Salt Lake City, UT 84107
Phone:
801-888-9999
E-Mail:

Refer to Provider:
Banner Health
Address:
1441 North 12th Street
PHOENIX, AZ 85006
Phone:
345-345-3453
E-Mail:
Email@Email.com

A Referral was made to Banner Health on 1/26/2015 8:55:00 AM to assist Steve Bosell with AA Meeting.

Report run date: 4/9/2015 Page 1 of 1

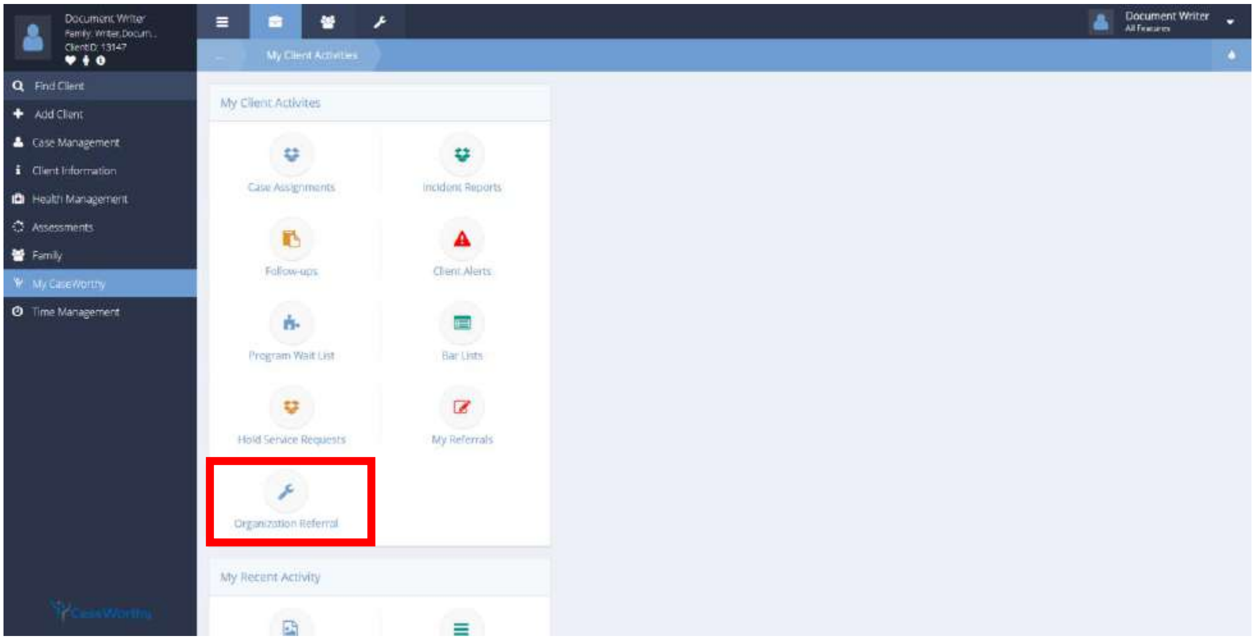
The report can be exported in various formats.



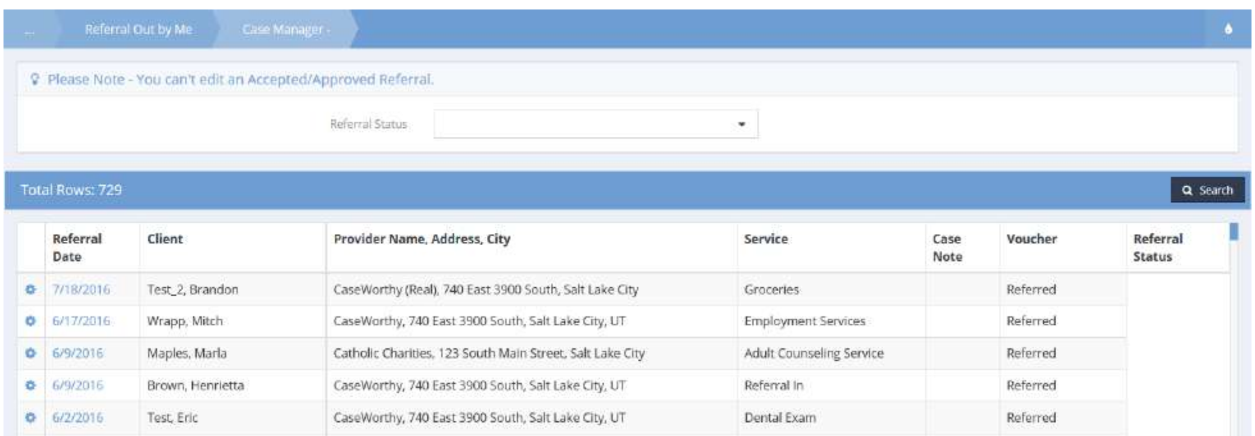
Organization Referral

Objective: Manage client referrals.

Navigation: Case Management>My CaseWorthy>My Client Activities



Select Organization Referral from the My Client Activities portion of the My Client Activities Dashboard. The Referral Out by Me form displays.

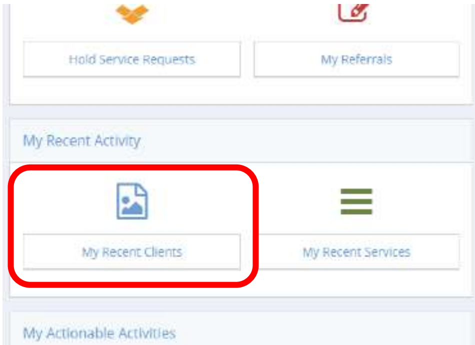


Exisiting referrals display. To edit a referral (change status/outcome or refer to user ID), view a referral report, or delete, click the action gear icon associated with the desired referral and select the appropriate menu option. Click the Done button when finished.

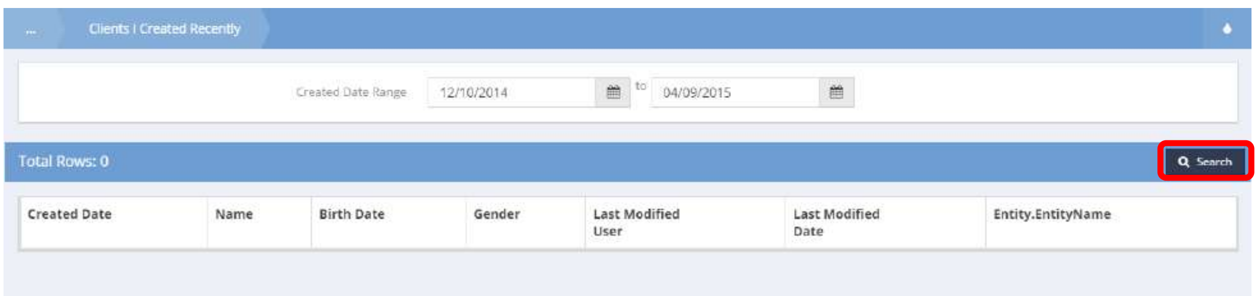
My Recent Activity

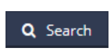
Clients Created Recently

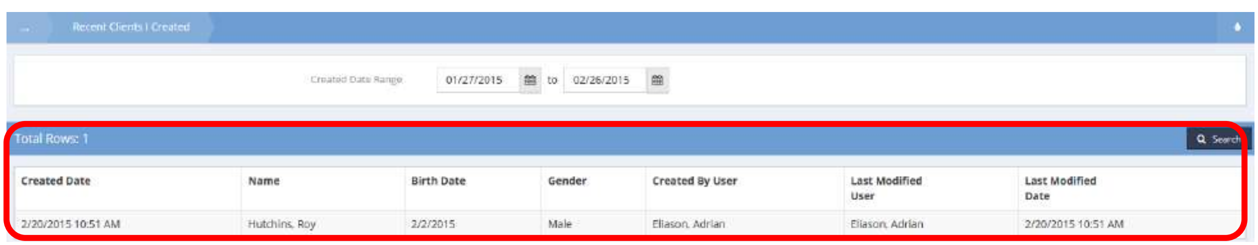
Objective: View a list of recent clients created by the currently logged on case manager within a chosen date range.



Click the My Recent Clients icon on the My Recent Activities menu. The Clients I Created Recently form displays.

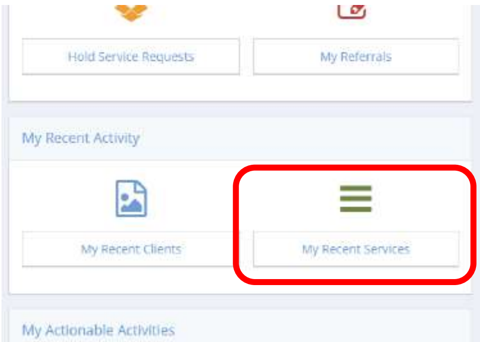


Select a date range and click the  button. Recently created clients display in the spreadsheet below.

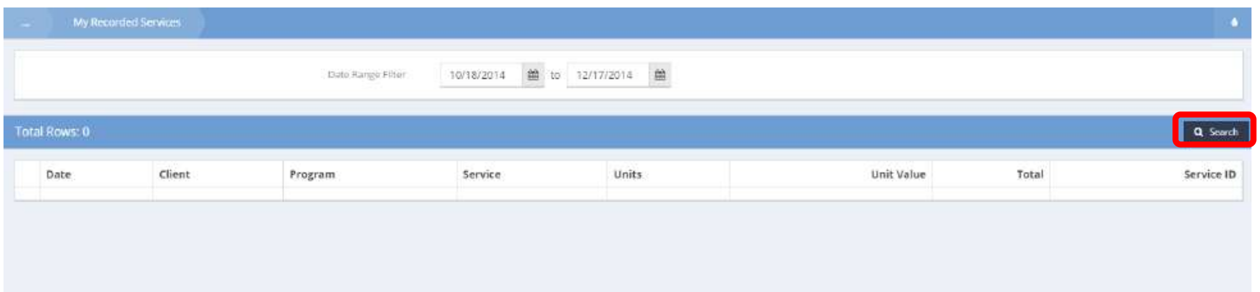


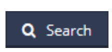
My Recent Services

Objective: View and edit recently recorded services.



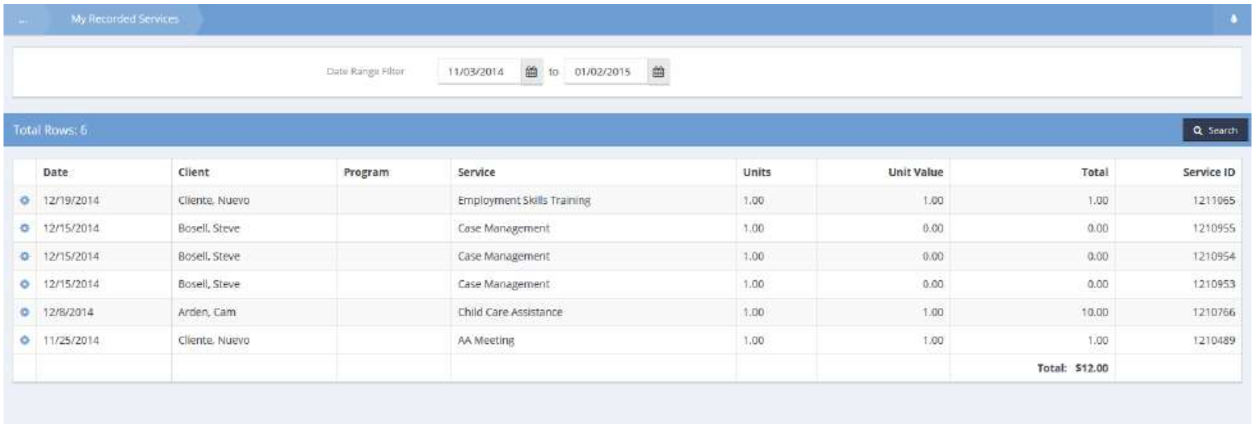
Click the My Recent Services icon on the My Recent Activity menu. The My Recorded Services summary form displays a list of services recorded by the case manager currently logged on.



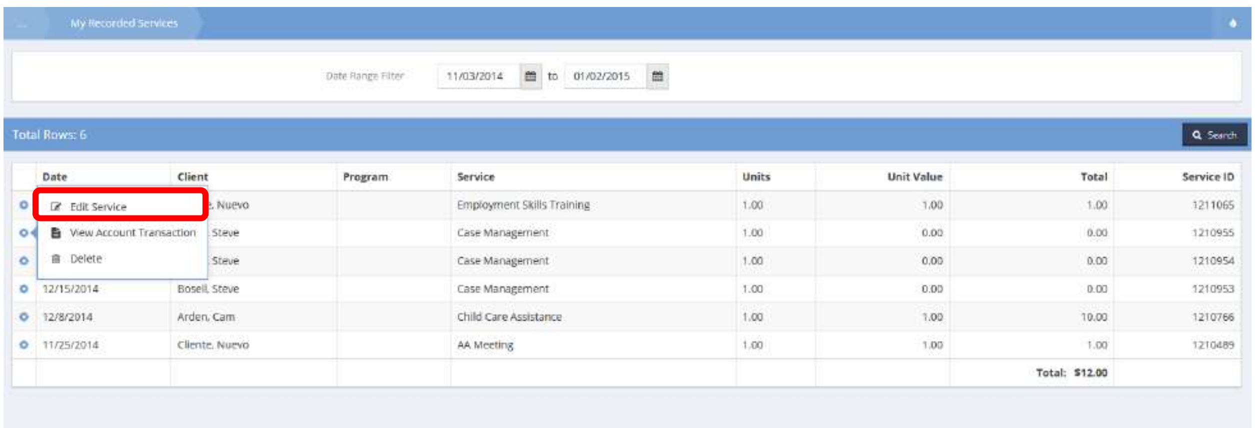
Select a date range and click the 

button.

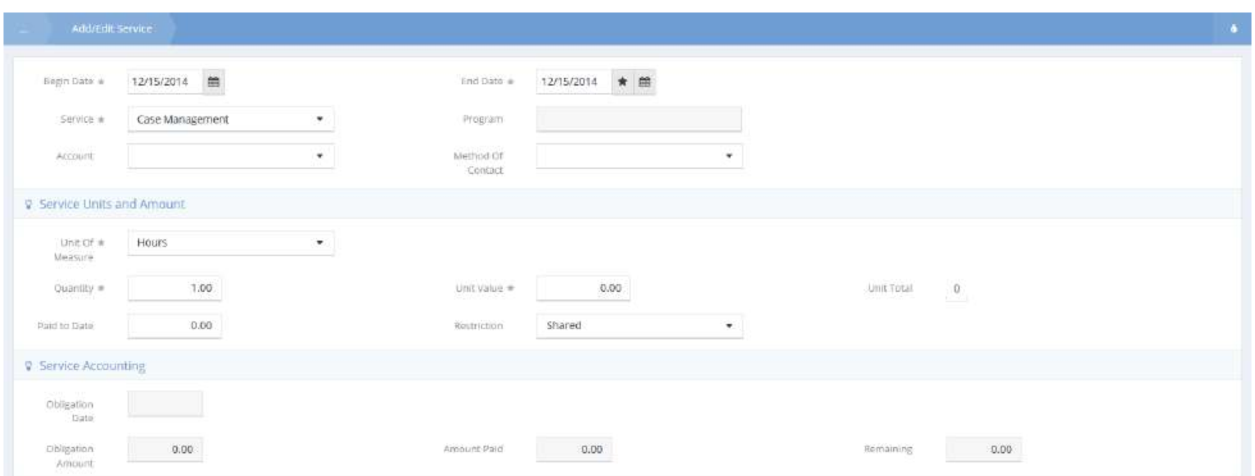
Services displays in the space below the search bar.



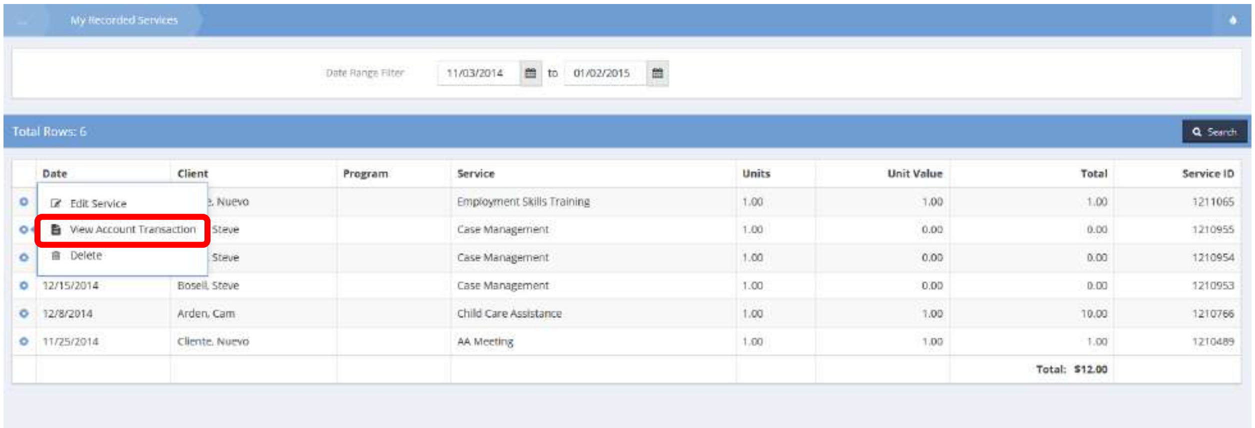
To edit a service, click the action gear icon associated with it and select Edit Service.



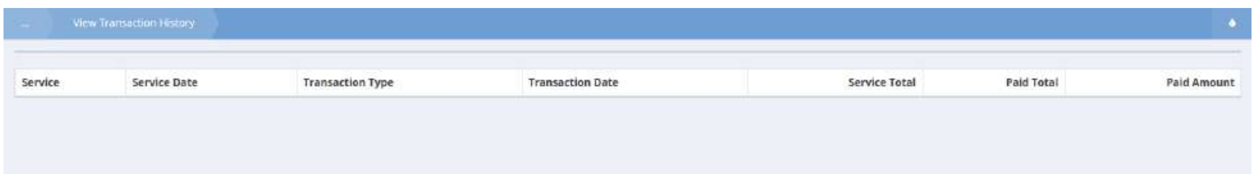
The Add/Edit Service form displays. Make any changes and click the Save button.



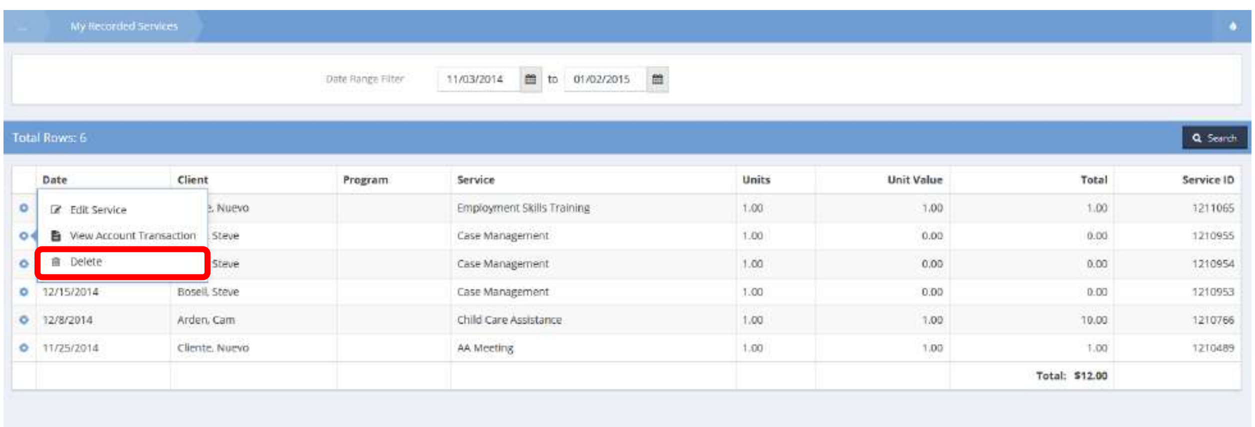
The My Recorded Services form displays again with the new record in the list.



To view a transaction, click the action gear icon associated with it and select View Account Transaction. The View Transaction History form displays.



Click Done when finished viewing. The My Recorded Services form displays again.

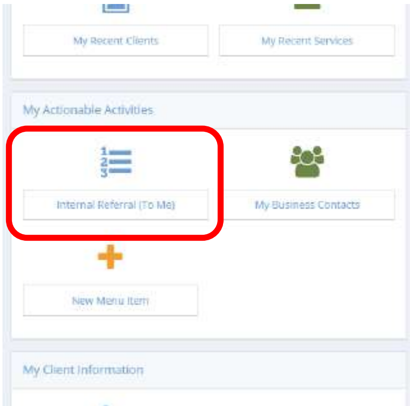


To delete a recorded service, click the action gear icon associated with it and select Delete. Click OK on the confirmation dialog box that appears

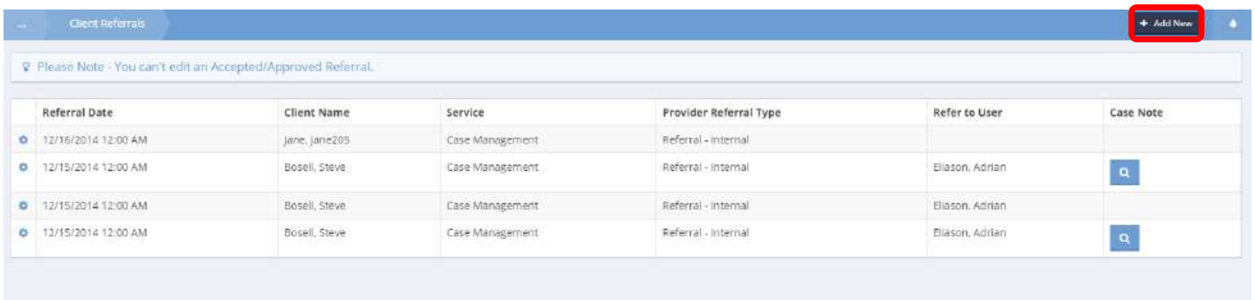
My Actionable Activities

Internal Referrals Input

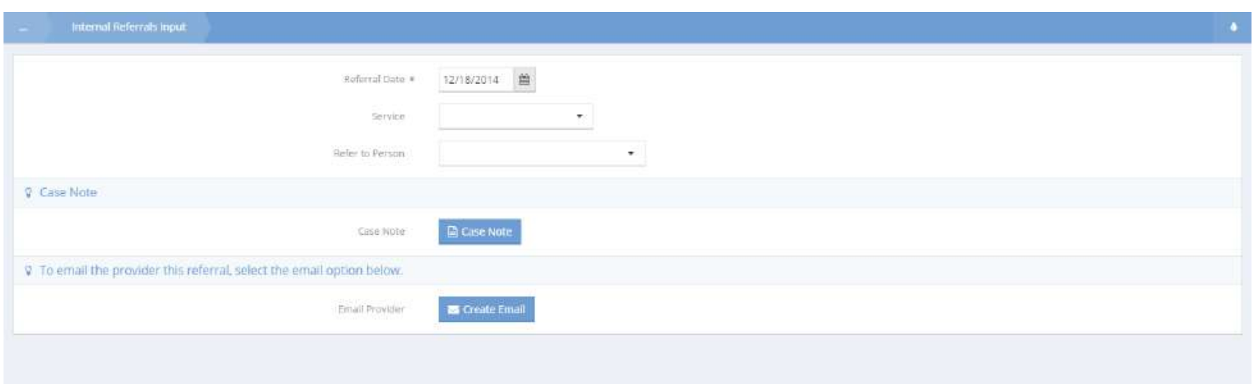
Objective: Add a new internal referral.



Click the Internal Referral (To Me) icon on the My Actionable Activities menu. The My Client Referrals form displays.

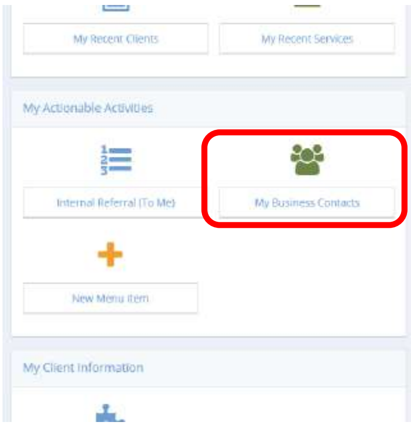


Click the + Add New button. The Internal Referrals Input form displays. Enter all necessary info and click Save when finished.



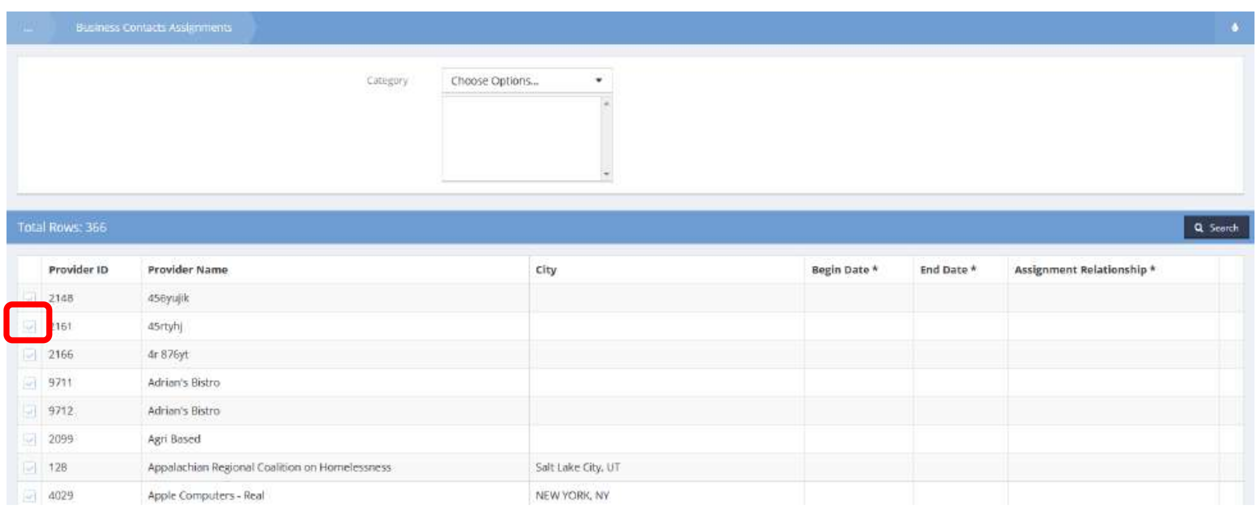
My Business Contacts

Objective: View and edit business contacts.

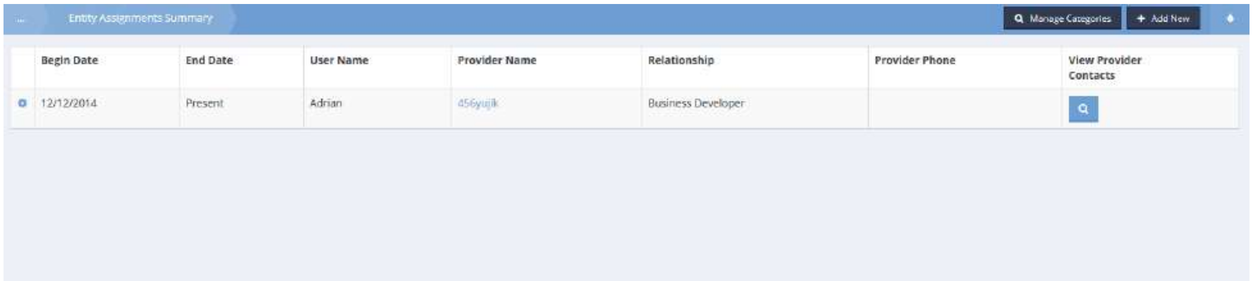


Click the My Business Contacts icon on the My Actionable Activities menu. The Entity Assignments Summary form displays.

To add a new provider, click the Add New button. The Business Contacts Assignments form displays.

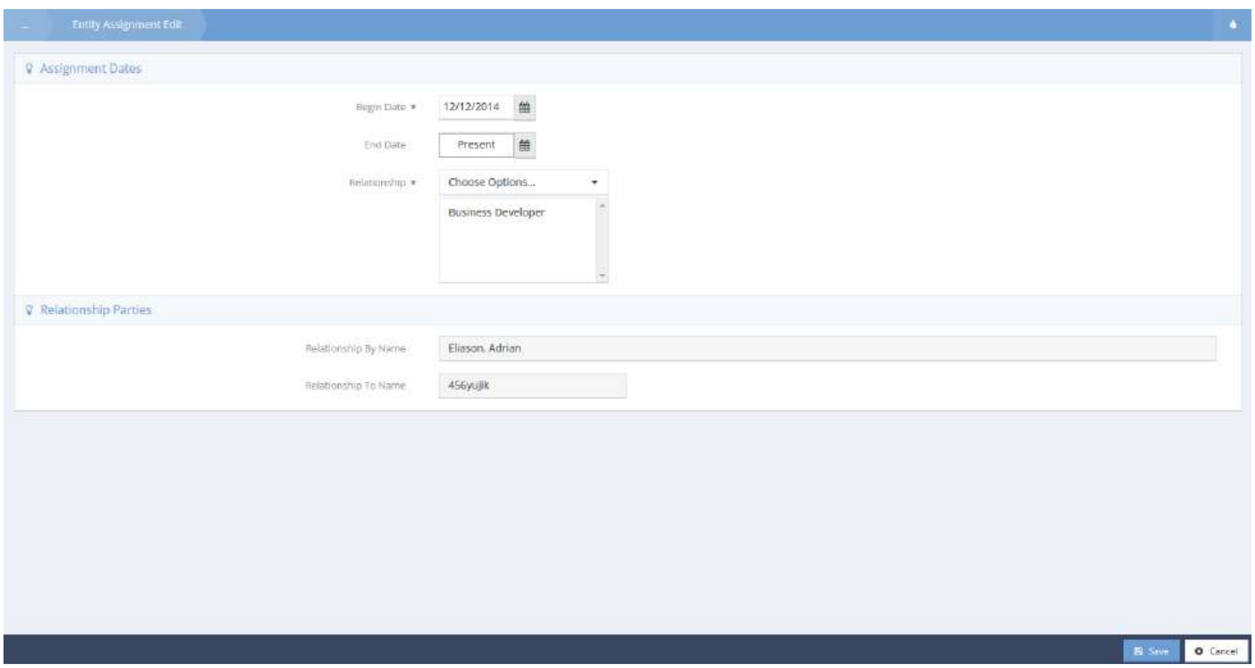


Click the clear checkbox and enter a begin date, end date, and relationship. Click on the Save button. The Entity Assignments Summary form displays.



To edit a provider, click the action gear icon associated with it and select Edit from the pop up menu that appears.

The Entity Assignment Edit form displays.



Make any changes and click the Save button. The Entity Assignments Summary form displays again.

Begin Date	End Date	User Name	Provider Name	Relationship	Provider Phone	View Provider Contacts
12/12/2014	Present	Adrian	456yujik	Business Developer		
1/6/2015	Present	Adrian	CaseWorthy	Business Developer	801-888-9999	

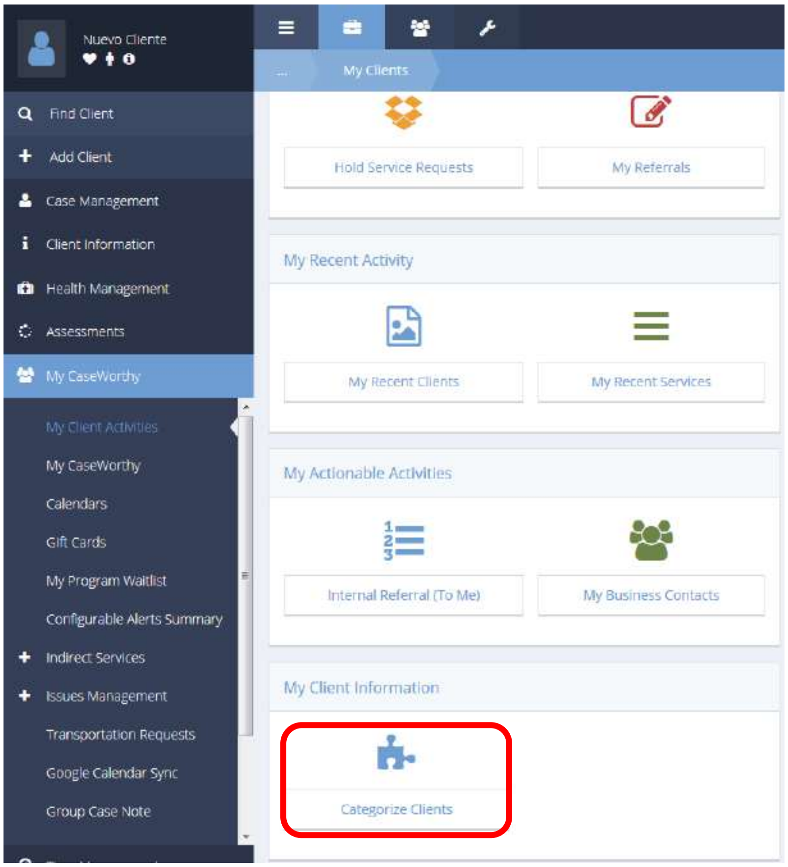
To view provider contacts, click the magnifying glass icon under a provider. The View Provider Contacts form displays.

Name	Email Address	Begin Date	End Date	Phone Type	Phone
Test, Test2	pgummadapu@myecm.net	10/3/2012	Present	Cell	111-111-1111
monti, meg, meg2	mmonti@myecm.net	4/10/2013	Present	Cell	
T, Jane, Jane2	jtjoe@myECM.net	6/25/2013	Present	Cell	
User, Approval, Approval2		12/5/2014	Present	Cell	
Test, Jane2	buihuih@some.com	10/22/2012	Present	Cell	656-456-4564
Test, Jane22	fghjk@something.com	10/22/2012	Present	Cell	896-512-1022
Bingel, Brian2	bbingel@CaseWorthy.com	12/2/2011	Present	Cell	877-347-0877
Test, Test52	pgummadapu@myecm.net	10/3/2012	Present	Cell	111-111-1111
Test, Test42		10/3/2012	Present	Cell	
Test, Test22		10/3/2012	Present	Cell	
Test, Test32		10/3/2012	Present	Cell	

My Client Information

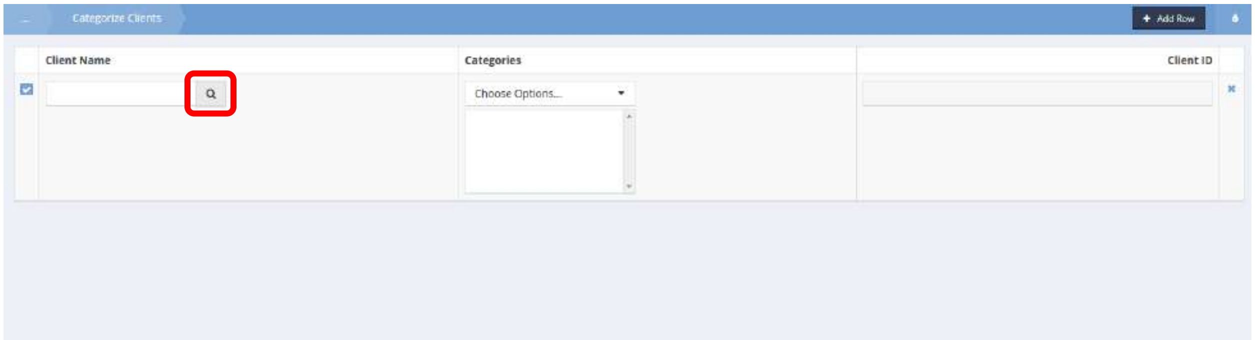
Categorize Clients

Objective: Categorize clients into set categories such as High Risk and Observe Taking Medications.



Click the Categorize Clients icon on the My Client Information menu. The Categorize Clients Summary form displays.

To add a new client to the list, click the + Add New button. The Categorize Clients form displays.

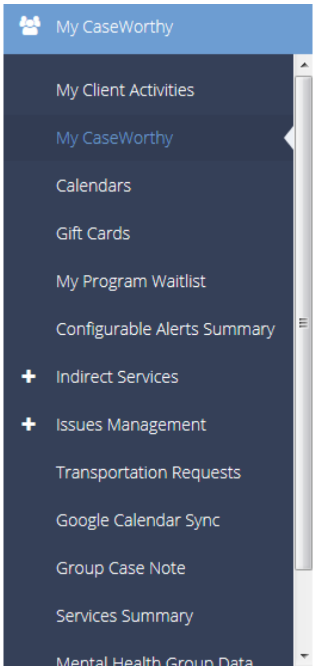


Click the magnifying glass icon to look up a client by program. The Clients in Program form displays.

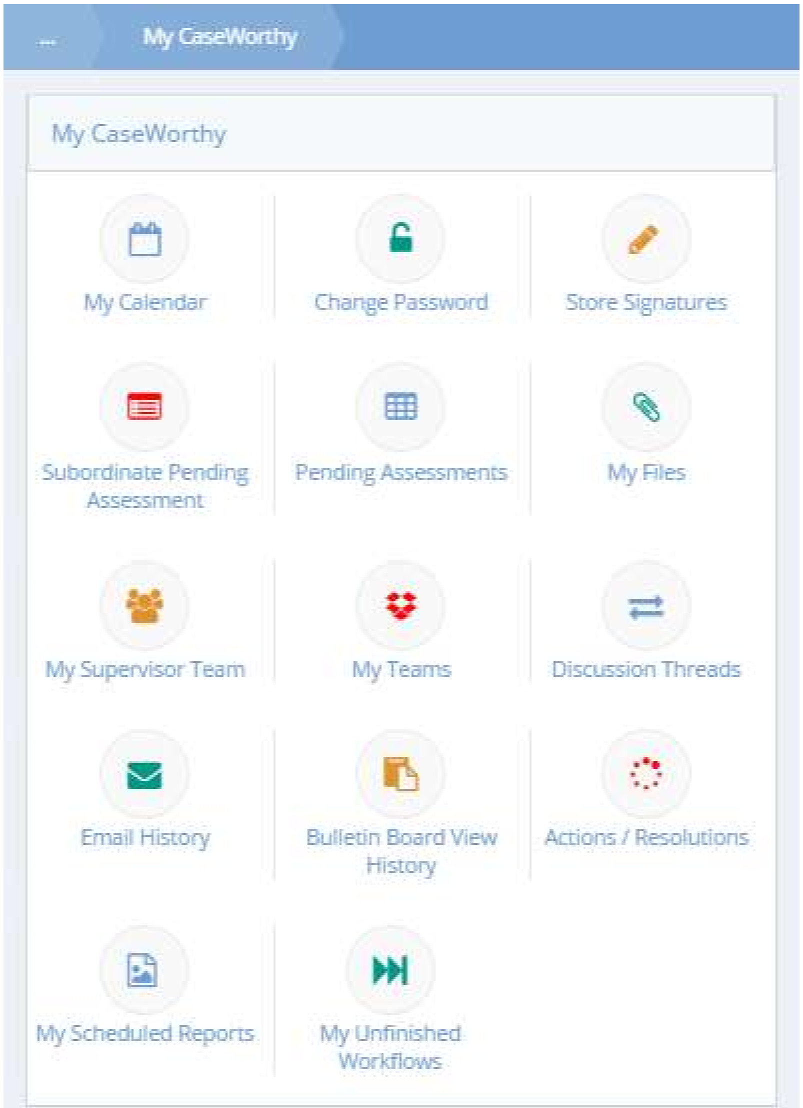
Select a program from the drop-down list, enter a name, and click Search to see a list in the lower half of the form.

Click the client's name to add it. Click Save when finished.

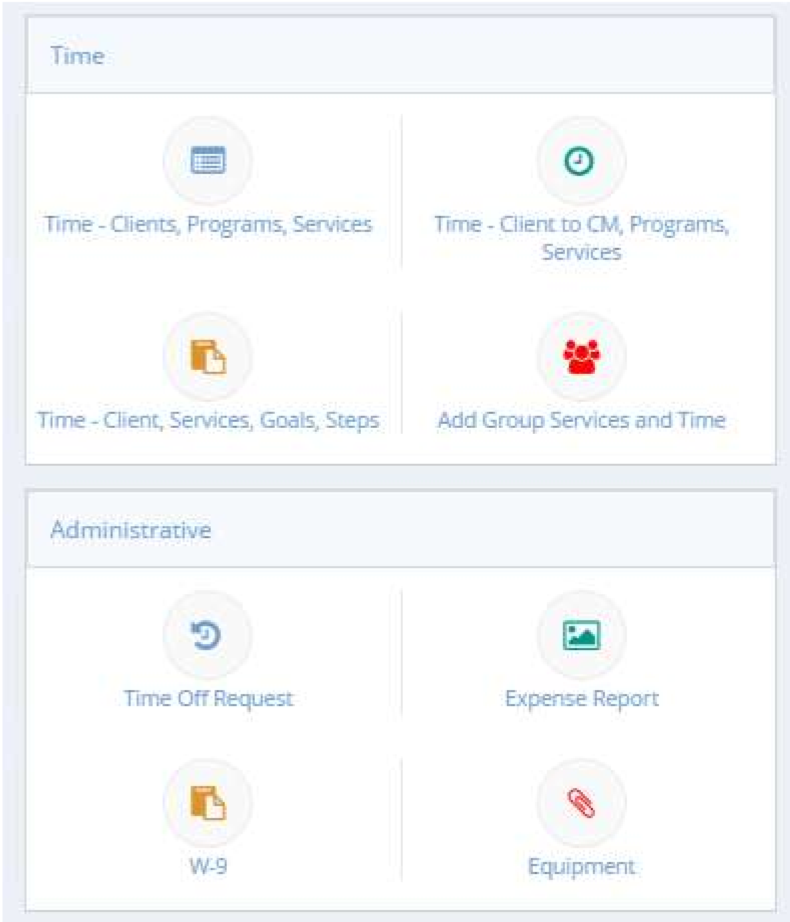
My CaseWorthy



The next menu item in the My CaseWorthy menu group is the "My CaseWorthy" dashboard.

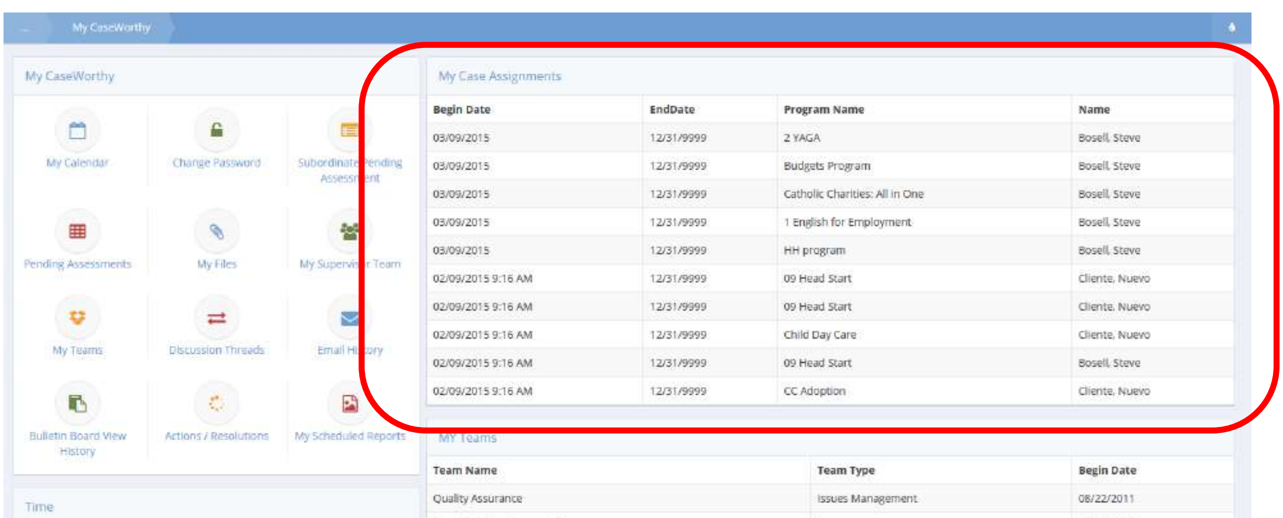


(Continued on next page)



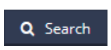
Goal Plan (Summary)

Objective: Edit, manage and delete goal plans and goal progress notes.

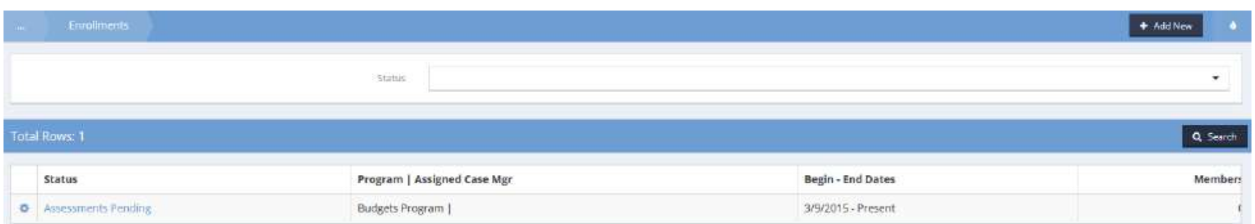


Click on the desired case assignment presented in the My Case Assignments query table on the My CaseWorthy dashboard. The My Case Assignments Summary form displays.

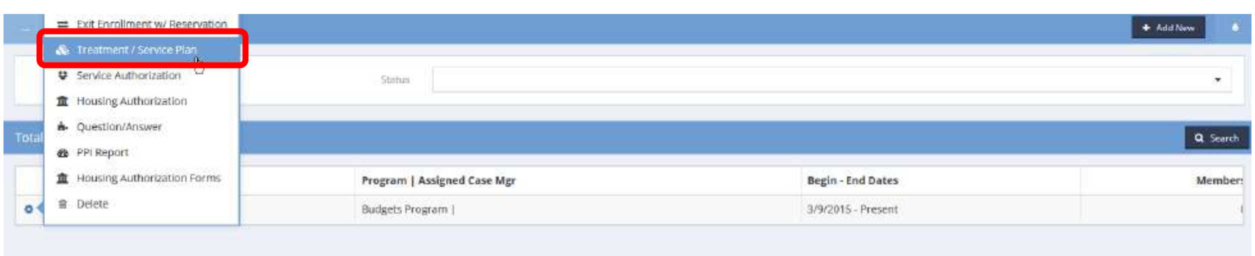
Click on the desired Program Name link. The Enrollments form displays.

Click on the 

button.
The relevant rows appear.



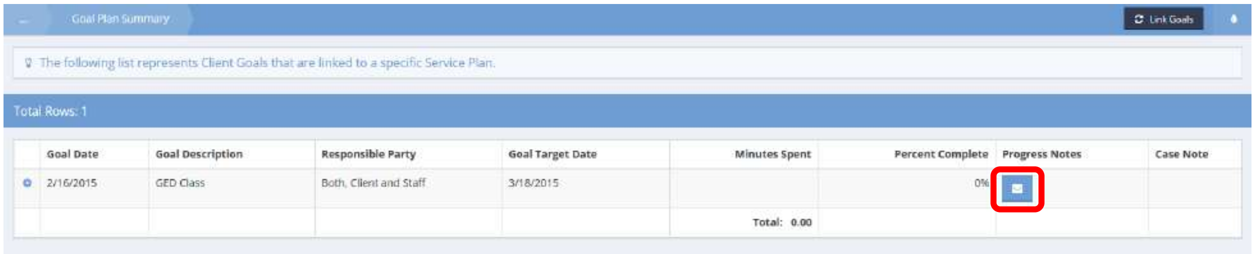
Click on the action gear  icon associated with the desired program. Select Treatment/Service Plan from the pop up menu that appears.



The Enrollment Service Plan Summary form displays.

Click on the action gear icon associated with the desired service plan. Select Service Plan Goals from the pop up menu that appears.

The Goal Plan Summary form displays.

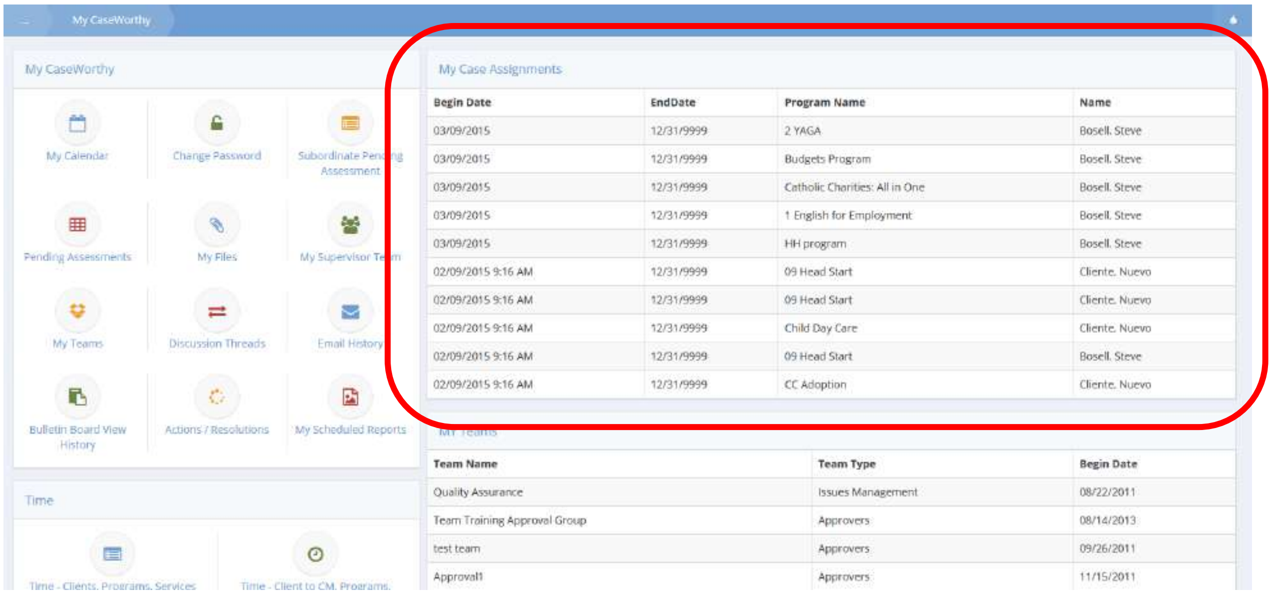


Click on the  button associated with the desired goal. The Progress Notes Summary by Goal form displays.

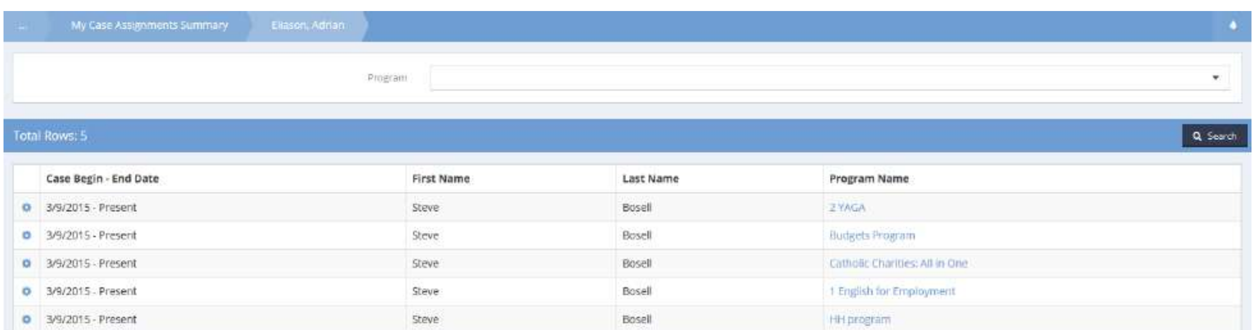
Print, edit or delete progress notes from this form.

Goal Progress Notes Summary

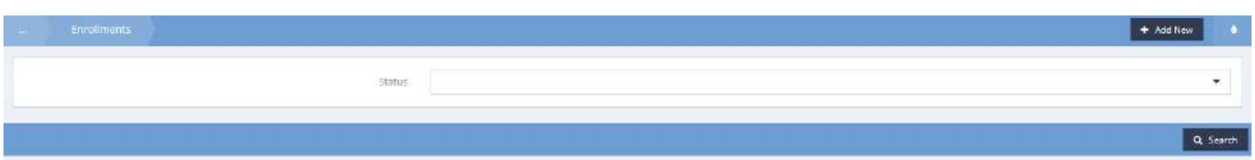
Objective: View, print, edit or delete goal progress notes.



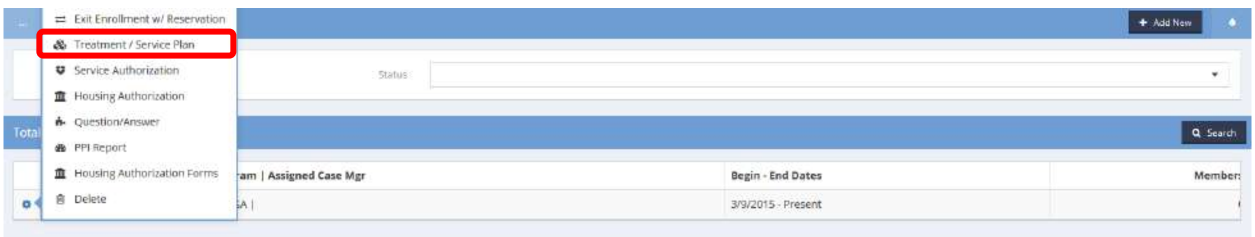
Click on the desired case assignment from the My Case Assignments query table on the My CaseWorthy dashboard. The My Case Assignments form displays.



Click on the desired case assignment program name hyperlink. The Enrollments form displays.



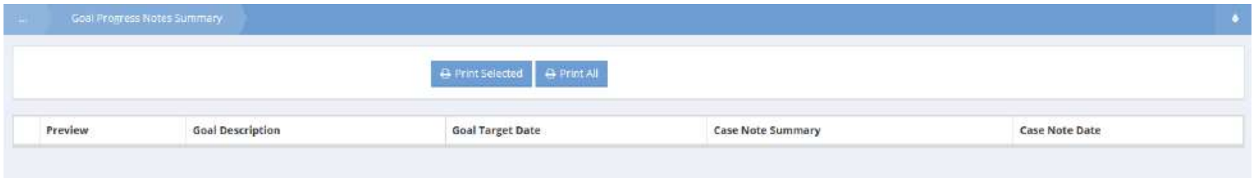
Click on the Search button. Qualifying enrollments appear on the form. Click on the action gear icon associated with the desired enrollment. Select Treatment/Service Plan from the pop up menu that appears.



The Enrollment Service Plan Summary form displays.

Click on the action gear icon associated with the desired service plan. Select Progress Notes from the pop up menu that appears.

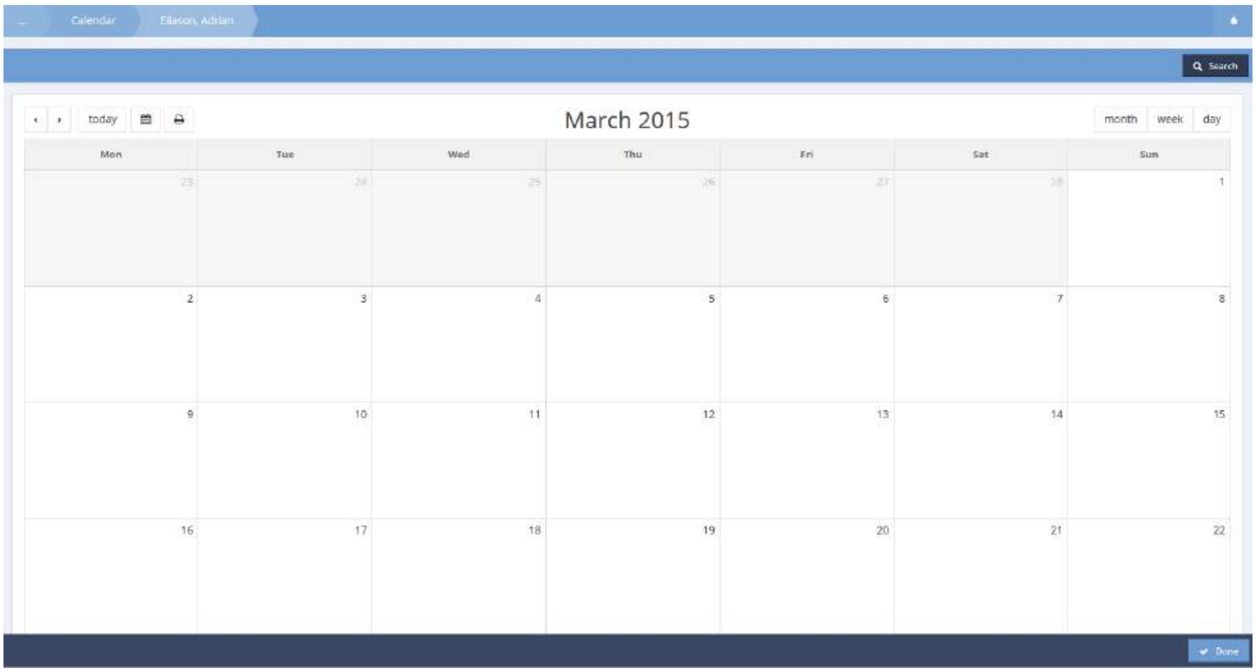
The Goal Progress Notes Summary form displays.



Print, edit or delete progress notes from this form.

My Calendar

Click on the "My Calendar" My Calendar icon. The Calendar displays.



The calendar format can be changed from month to week or day by clicking on the appropriate icon in the upper right of the form. A specific date may be selected by clicking on the date icon in the upper left of the form. The two arrow ‹ › icons move the display by month, either forward or backward. To print the calendar, click on the button.

Change Password

Clicking the "Change Password" 

icon opens the change password form. This form allows a user to change their password at any time. Simply key in and confirm the new password.

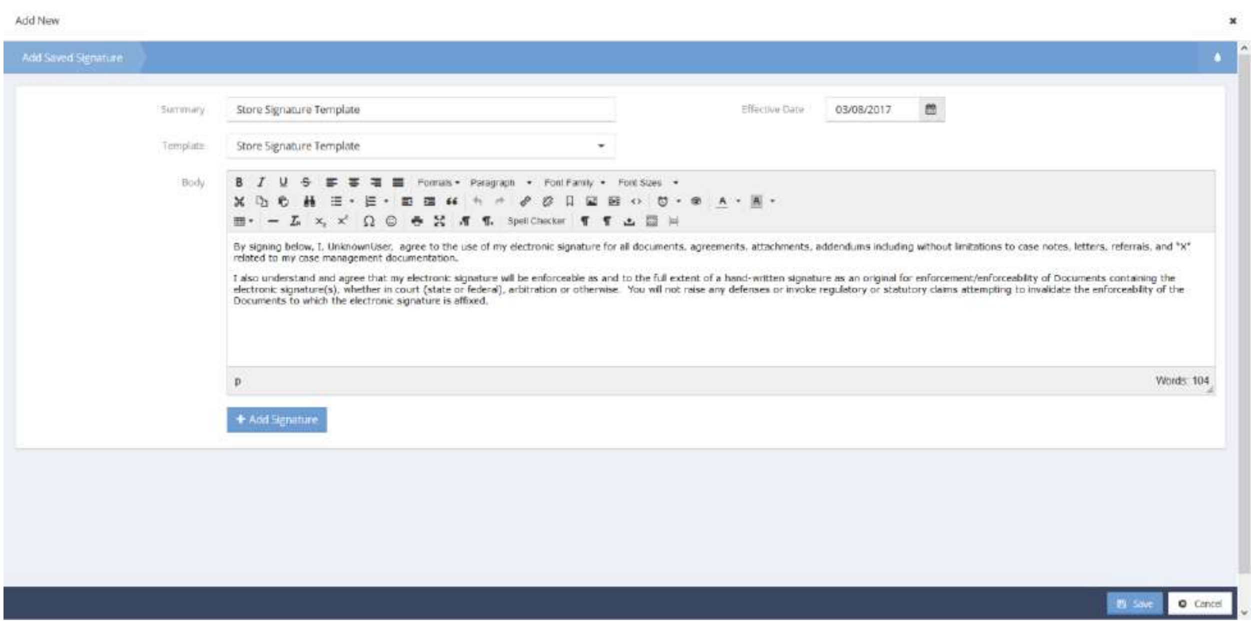
Stored Signatures

Objective: View and add signatures to be stored in the system for easy use on forms.

Navigation: Case Management>My CaseWorthy>My CaseWorthy>Store Signatures

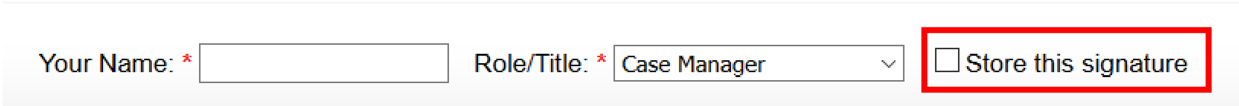
The Stored Signatures form displays.

A list of all stored signatures displays. To add a new signature, click the + Add New button. The Add Saved Signature form displays.



A disclaimer statement displays, notifying the user that they are agreeing to add their signature to the system. Click the + Add Signature button to add the signature.

The signature pad displays. To store the signature, make sure to click the Store this Signature checkbox.



Save to close.

Subordinate Pending Assessments

Clicking the "Subordinate Pending Assessments" 

icon opens the subordinate pending assessments summary form. Any user set up as a supervisor has access to the list of clients with assessments pending for all users linked as their subordinate.

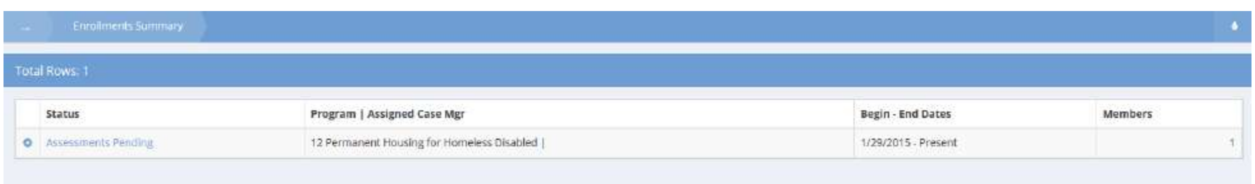
Pending Assessments

Clicking the "Pending Assessments" 

icon opens the pending assessments summary form. This form provides the user with a list of all of their clients for which enrollment assessments have not been fully completed.

Last Name, First Name	Enrollment Date	Program Name	Status
Bosell, Steve	3/6/2015	Shelter Plus Care	Assessments Pending
Cliente, Nuevo	1/29/2015	09 Head Start	Assessments Pending
Cliente, Nuevo	1/29/2015	12 Permanent Housing for Homeless Disabled	Assessments Pending

Click on the hyperlink for the desired assessment. The Enrollments Summary form displays.



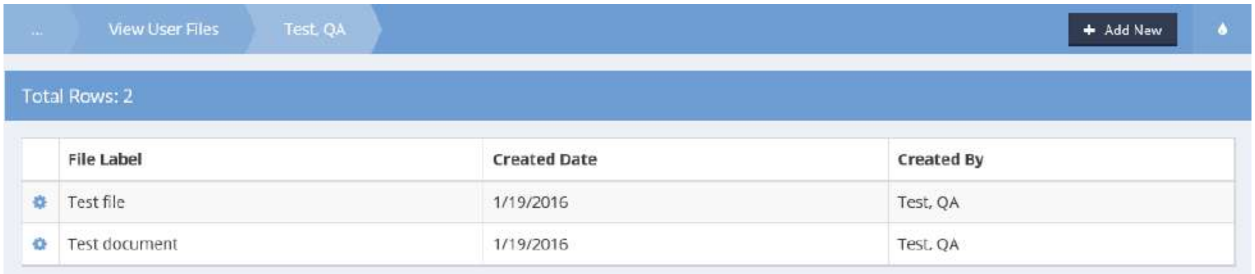
Status	Program | Assigned Case Mgr	Begin - End Dates	Members
Assessments Pending	12 Permanent Housing for Homeless Disabled |	1/29/2015 - Present	1

Locate the desired assessment and click on the action gear associated with it.

Select the desired menu option from the pop-up menu.

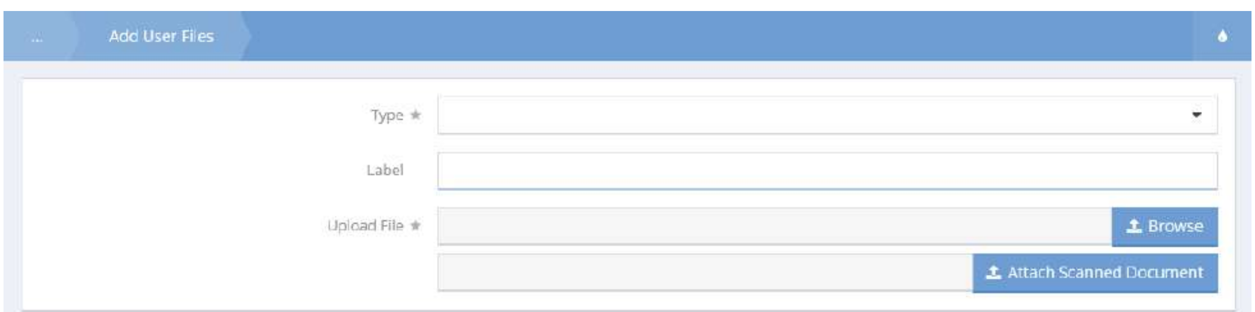
My Files

Click the My Files icon. The View User File form displays a list of all files saved for the user.



To view a saved file, click on the action gear icon for the desired file and select View Image from the pop up menu that appears.

To save a new file, click on the Add New button. The Add User Files form displays.

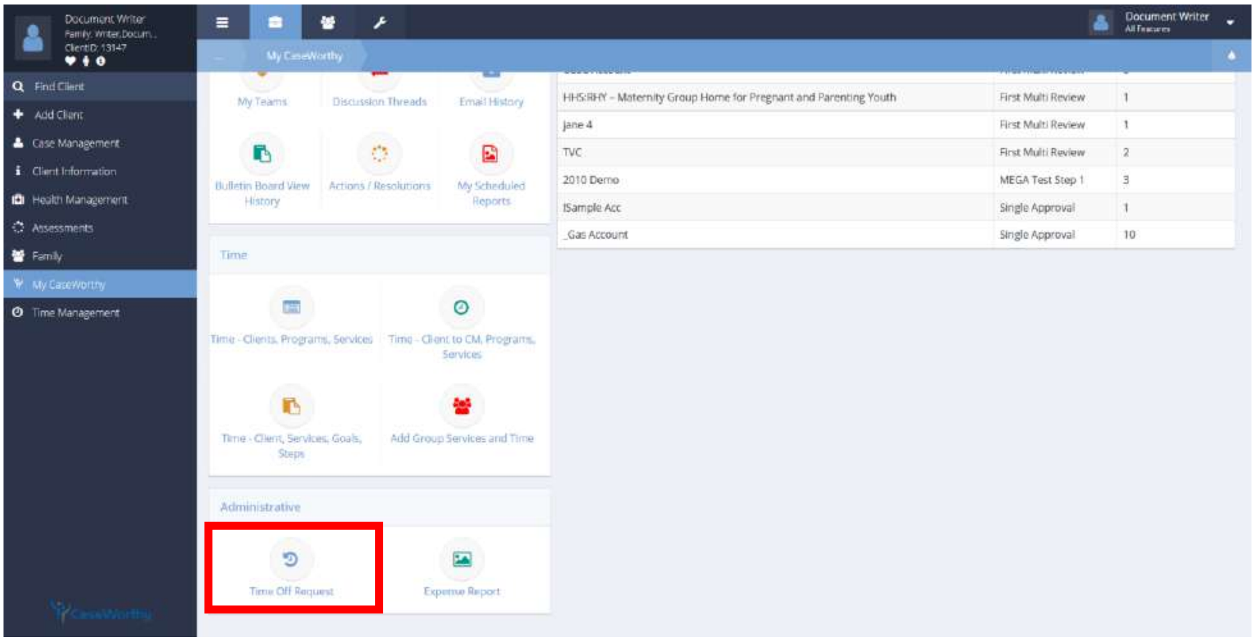


Select the file type from the drop-down menu. Enter a label for the file. Click on the Browse button and locate the file to be saved. Save the form. Click the Done button when finished viewing the files.

Time Off Request

Objective: Create and view time off requests.

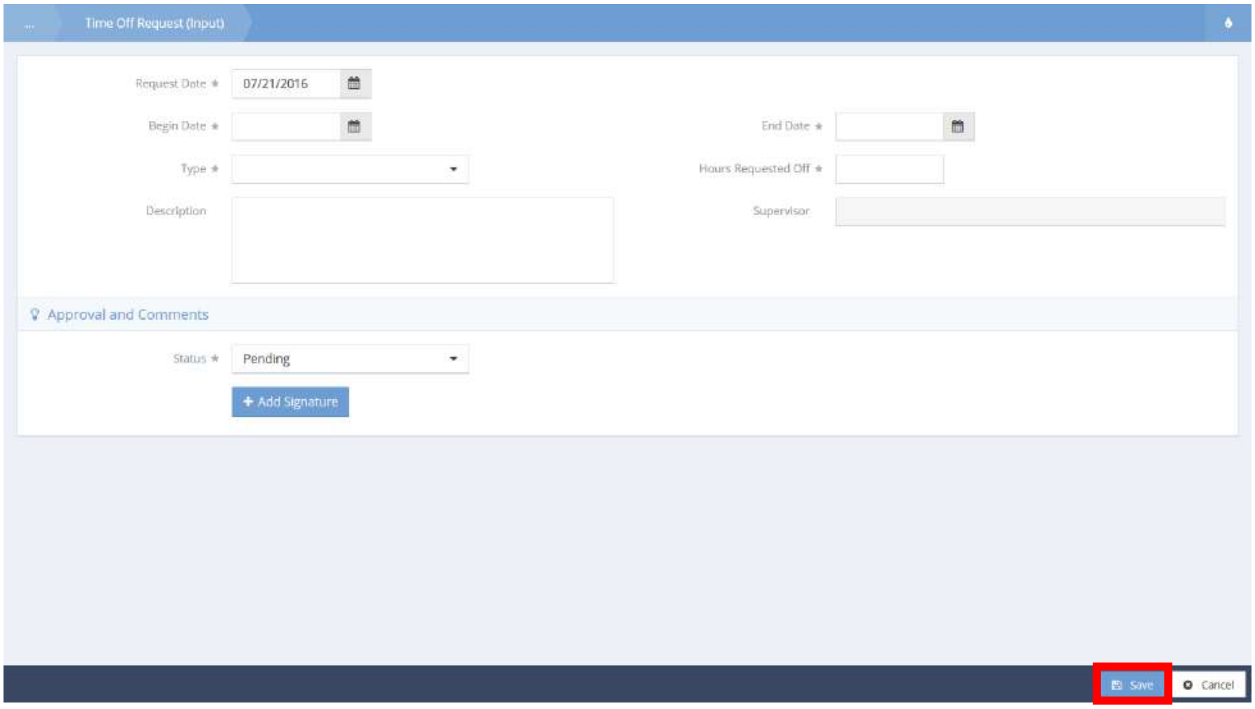
Navigation: Case Management>My CaseWorthy>Time Off Request

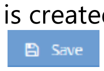


Select Time off Request from the Administrative portion of the My CaseWorthy dashboard. The Time Off Summary form displays.

Exisitng requests display. Click the action gear icon associated with the desired request to Edit or Delete by selecting the appropriate menu option. To add a new request, click the Add New button.

The Time Off Request (Input) form displays.



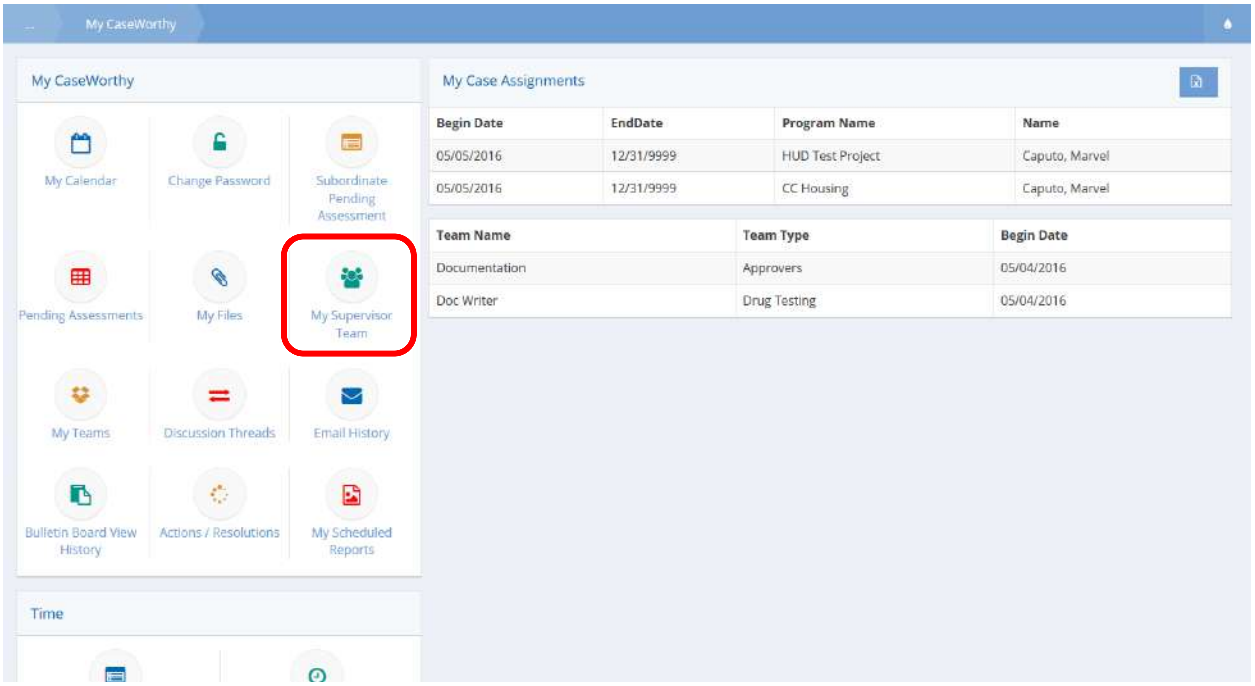
The Request date defaults to the date the request is created. Input a Begin and End Date. Enter a time off Type, Hours Requested Off, and a Status. Click the 

button to save and exit.

My Supervisor Team

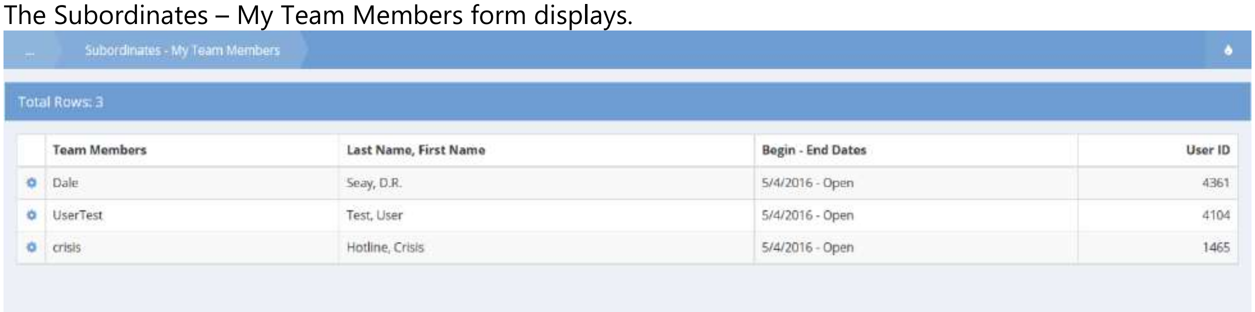
Objective: Edit planned services for an enrollment as well as enrollment members' entry and exit dates.

Navigation: Case Management>My CaseWorthy>My CaseWorthy



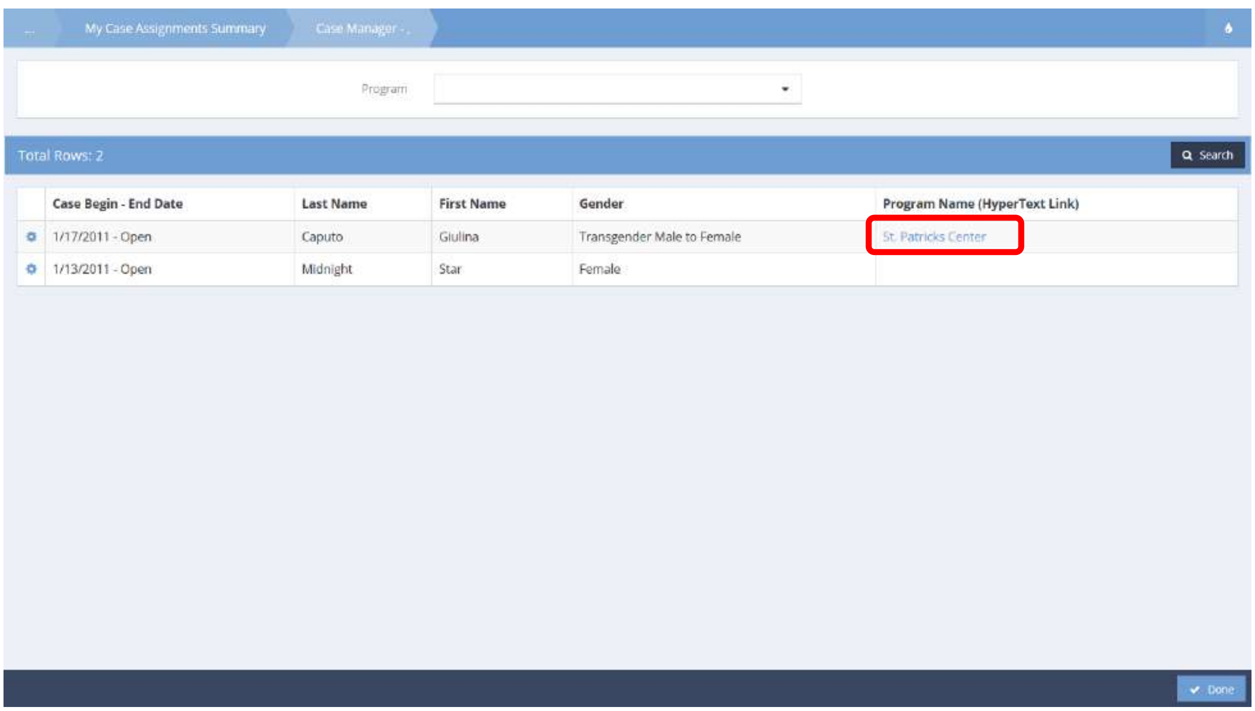
Select My Supervisor Team from the My CaseWorthy portion of the My CaseWorthy dashboard.

The Subordinates – My Team Members form displays.



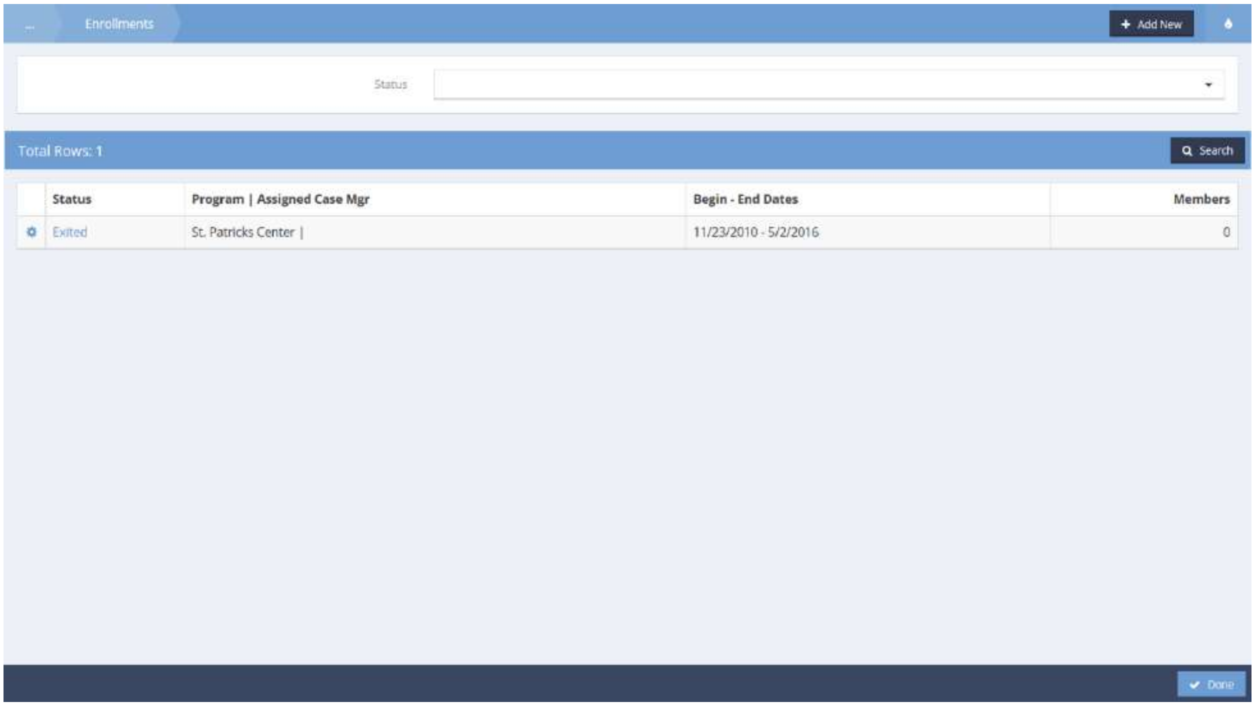
Select the action gear icon associated with the desired team member and select Case Assignment from the menu options.

The My Case Assignments Summary form displays.

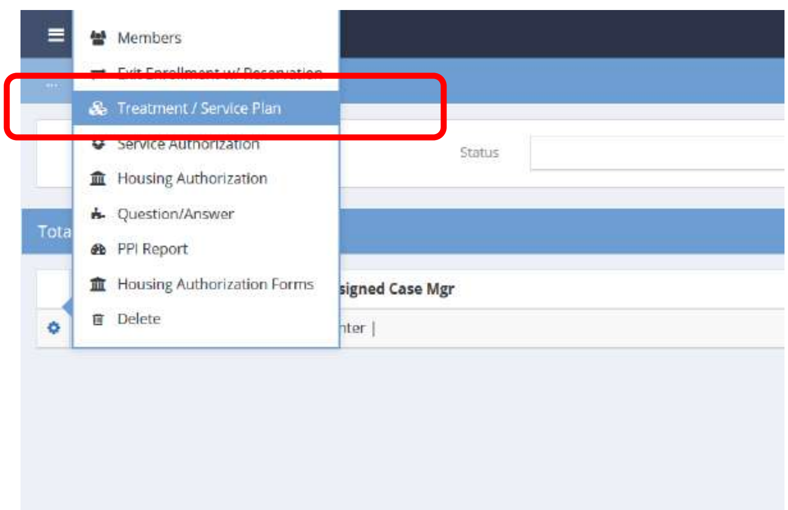


Select the desired program name.

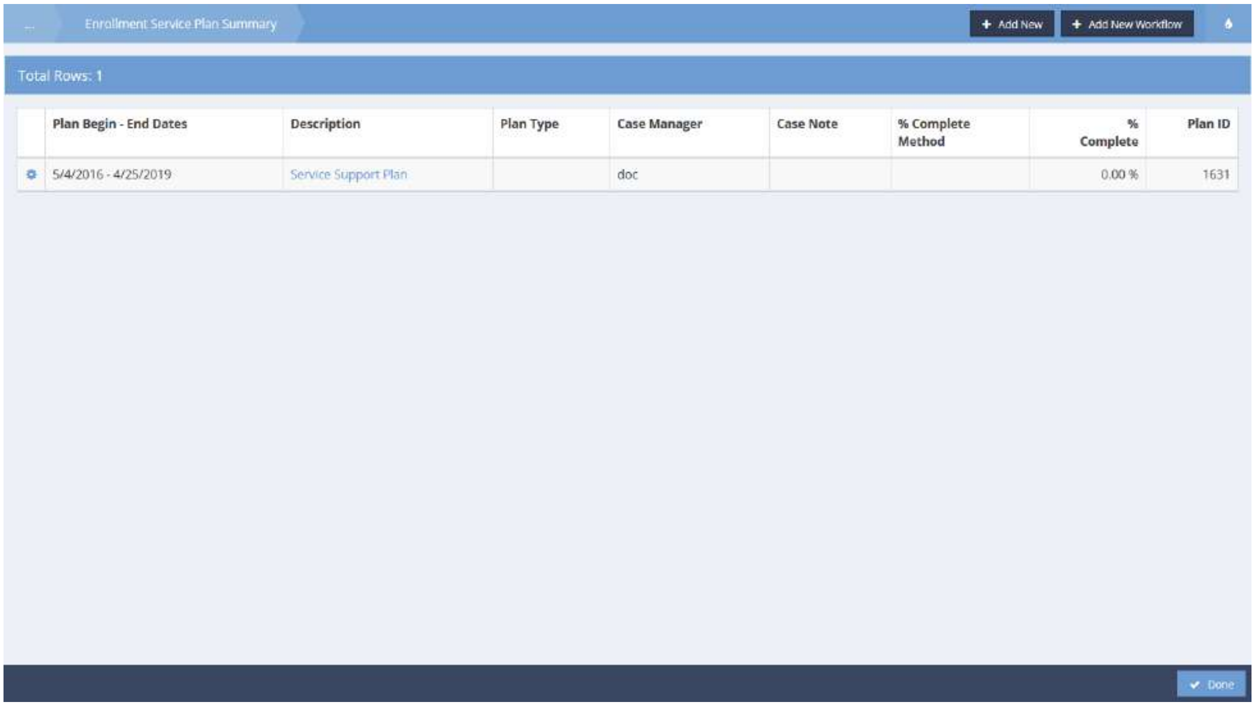
The Enrollments form displays.



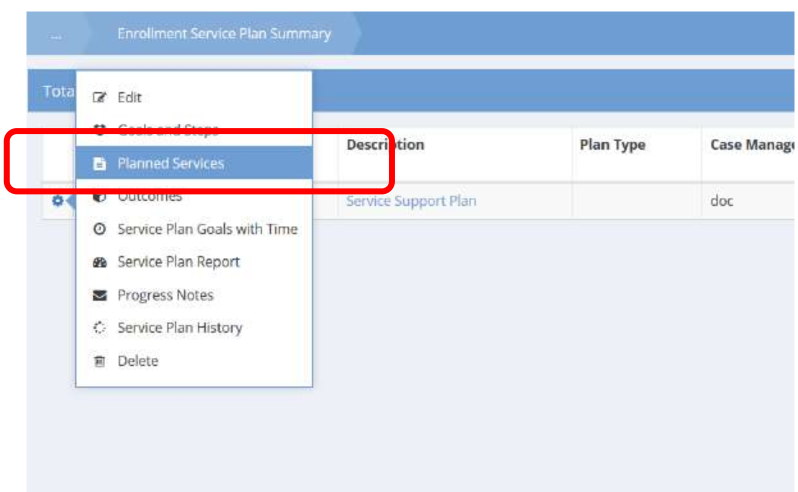
Select the action gear icon associated with the desired program status and select Treatment / Service Plan from the menu options.



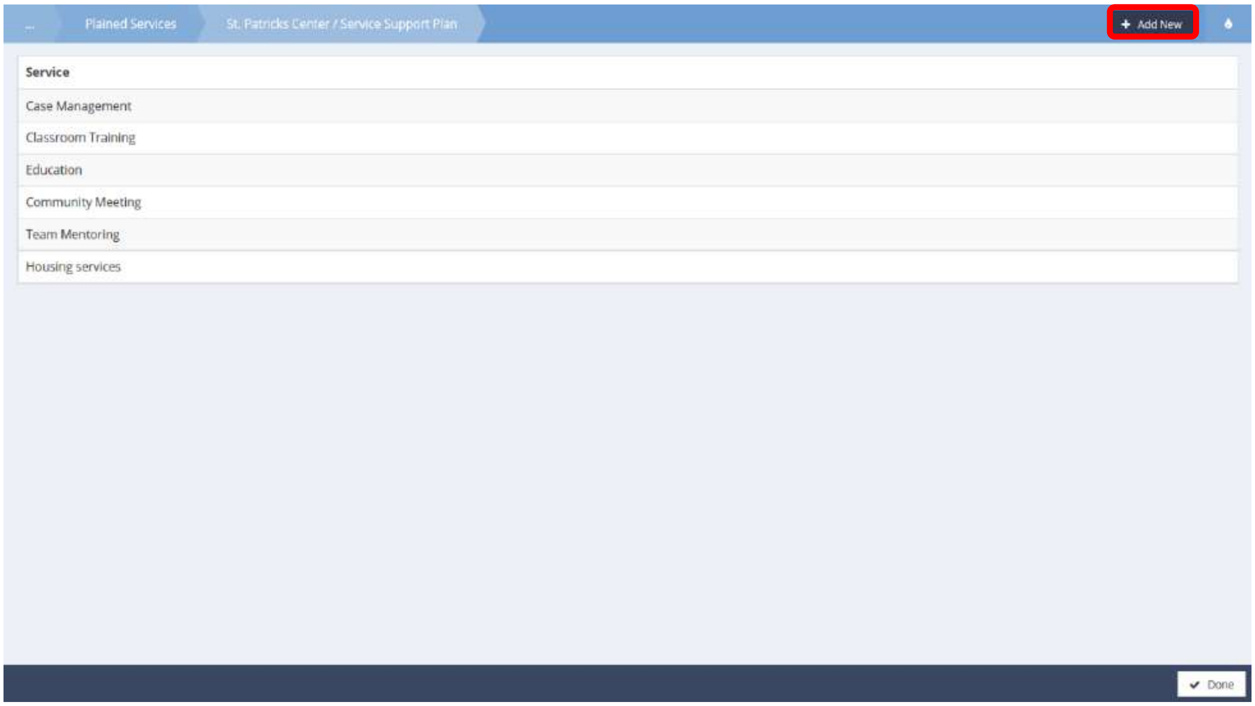
The Enrollment Service Plan Summary form displays.



Select the action gear icon associated with the desired service plan and select Planned Services from the menu options.

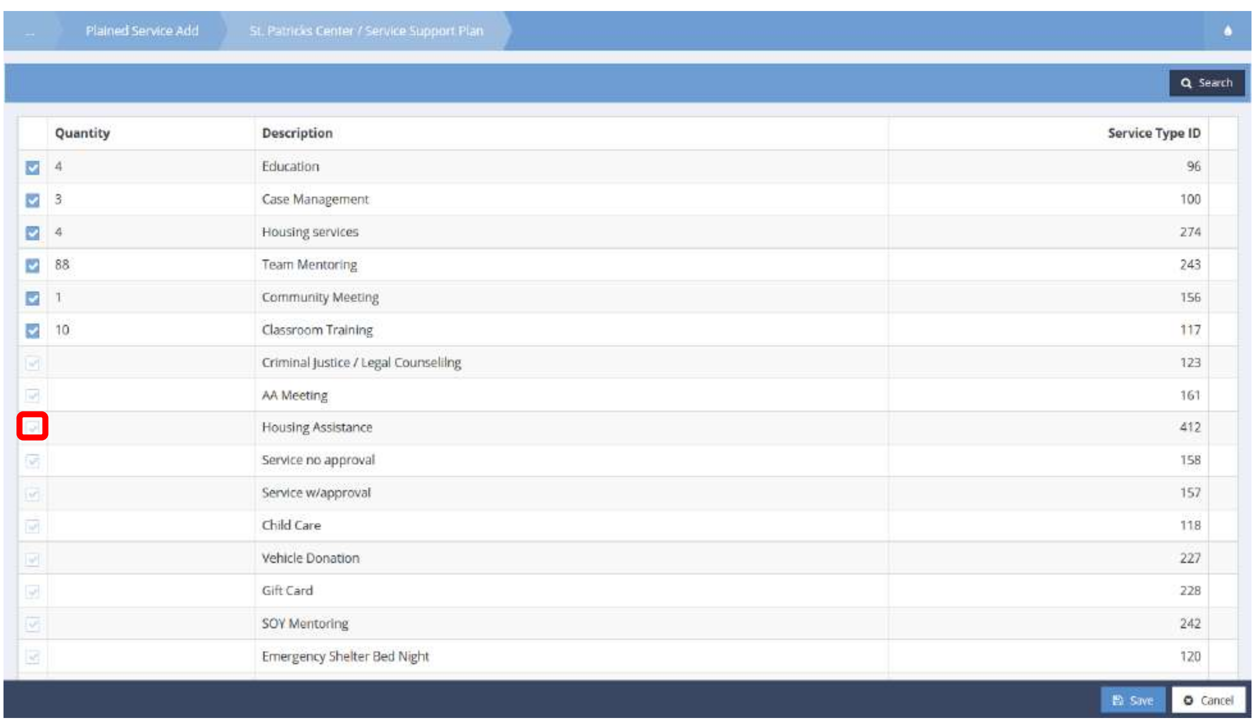


The Planned Services form displays.



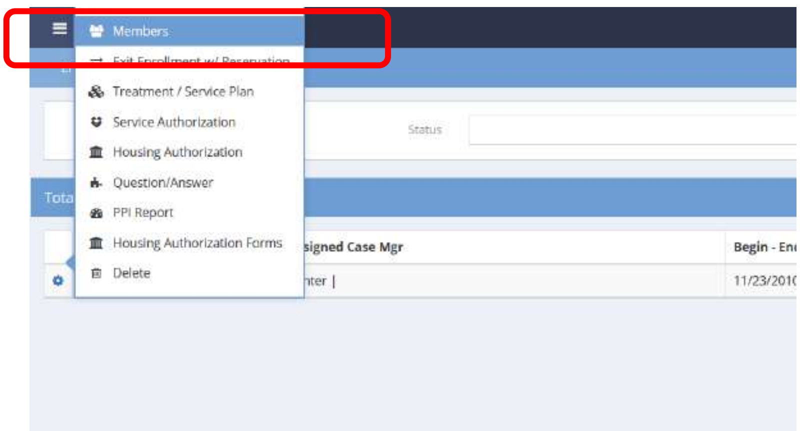
To add a new planned service, simply click the **+ Add New** button.

The Planned Service Add form displays.

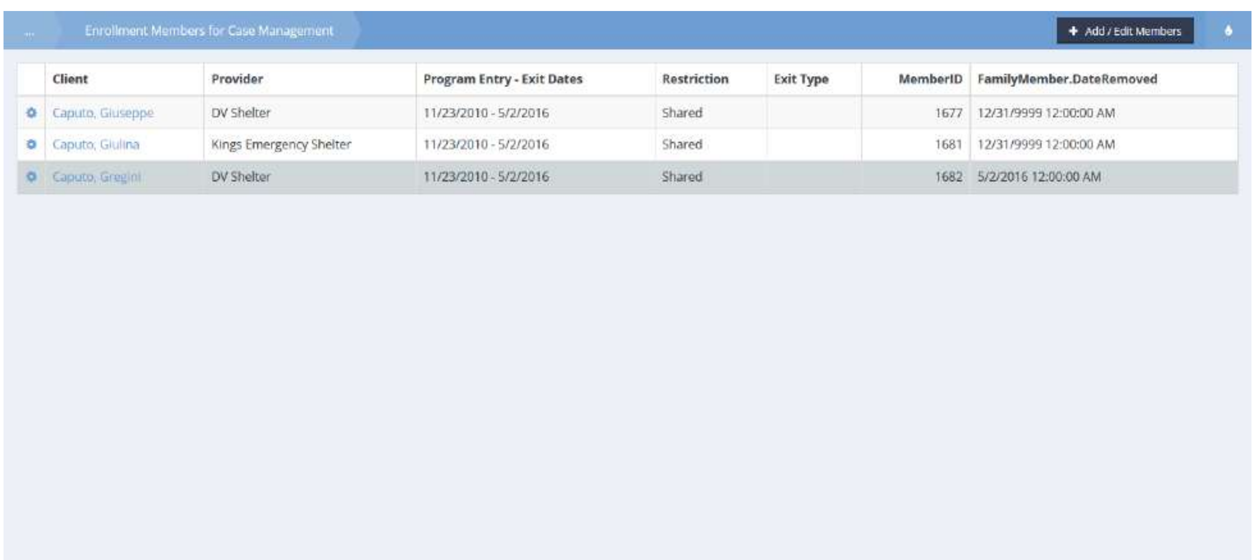


Currently planned services are indicated by a blue checkbox icon. To add new services, check the clear checkbox icon associated with the desired services, the row expands for editing. Enter a valid quantity.

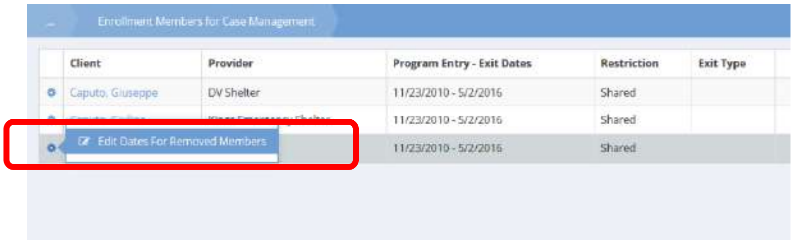
Click the Save button to save and exit. To add or remove members to or from a team, follow the steps above but select Members from the action gear icon menu options (located on the Enrollments form).



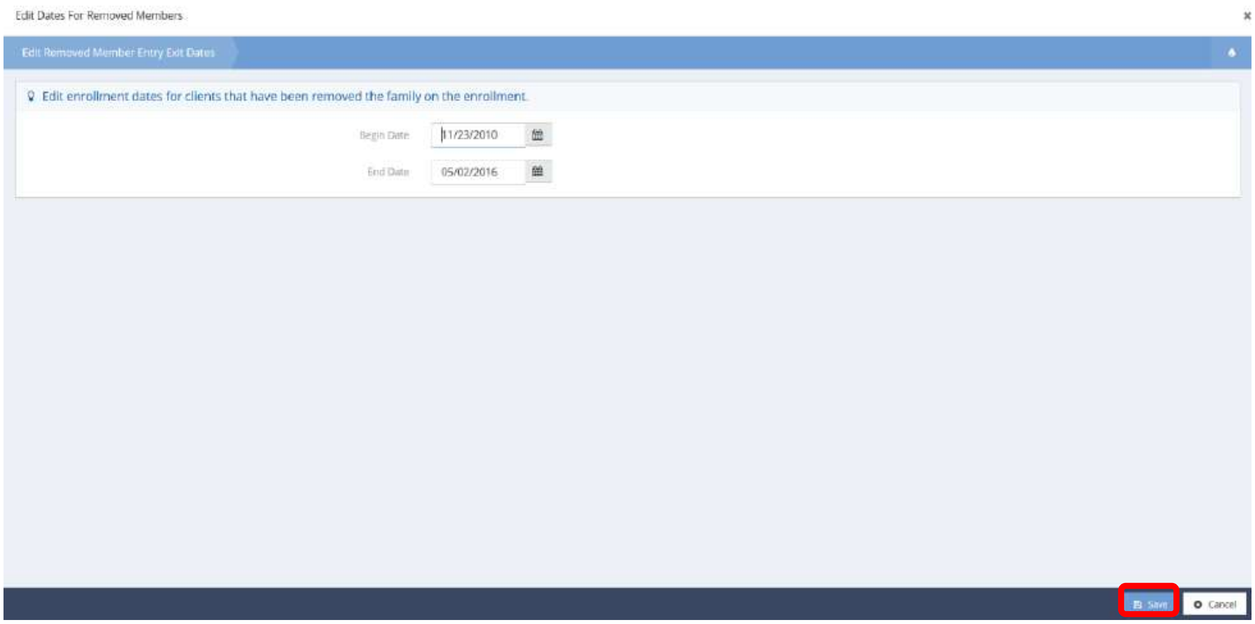
The Enrollment Members for Case Management form displays.



Select the action gear icon associated with the desired member and select Edit Dates For Removed Members from the menu options.



The Edit Removed Member Entry Exit Dates form displays.



Edit Begin Date and End Date as needed and click the  button to save and exit.

Expense Reports

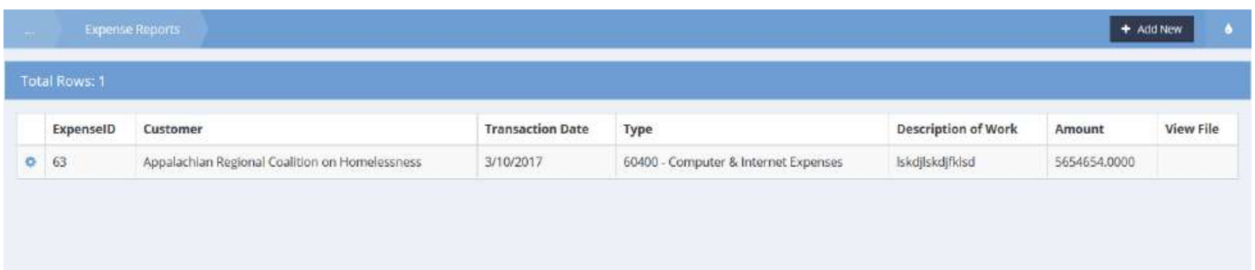
Objective: View and create expense reports for supervisor team members.

Navigation: Case Management>My CaseWorthy>My CaseWorthy>My Supervisor Team

The Subordinates – My Team Members form displays.

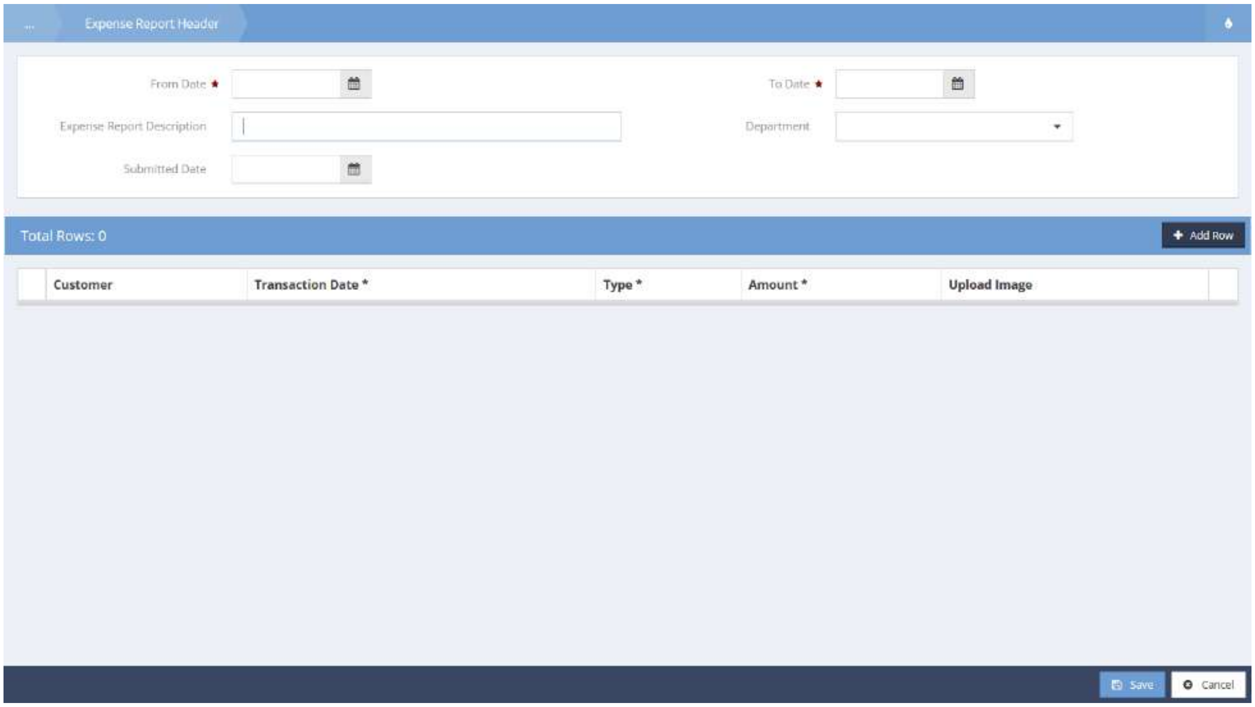
Click the action gear icon associated with the desired user and select Expense Reports from the menu options.

The Expense Reports form displays.

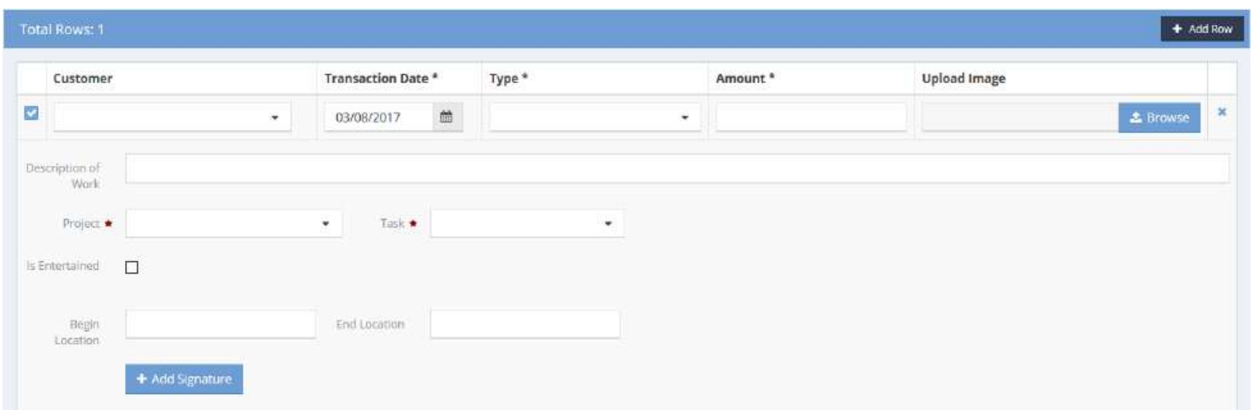


A list of all filed expense reports for that user display. Use the action gear icon to launch the report. To add a new report, click the Add New button.

The Expense Report Header form displays.



Enter a date range and description and use the Add Row button to add detailed information for each expense. The row expands.



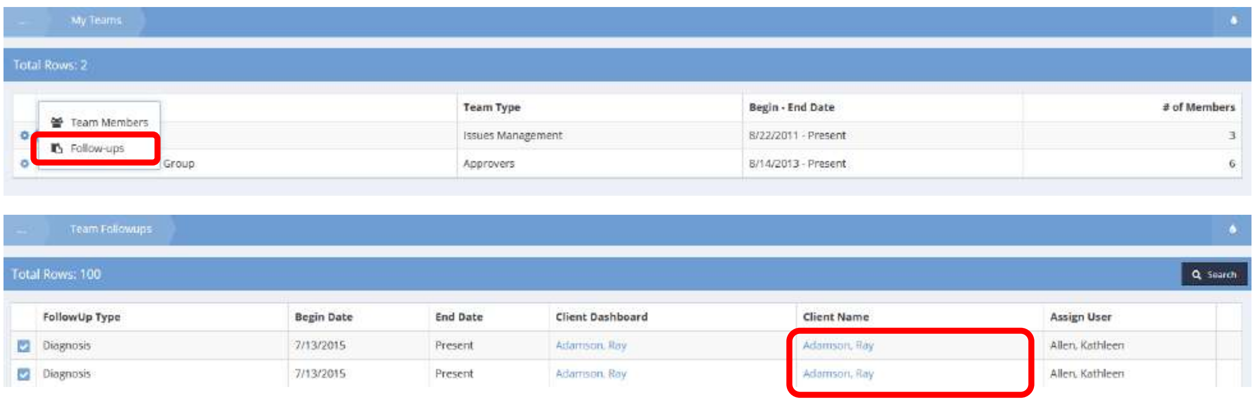
Select the type of expense that is being filed, the amount, project, and task associated with the expense. Add an image (receipt) or signature if desired. Save and close.

My Teams

The My Teams 

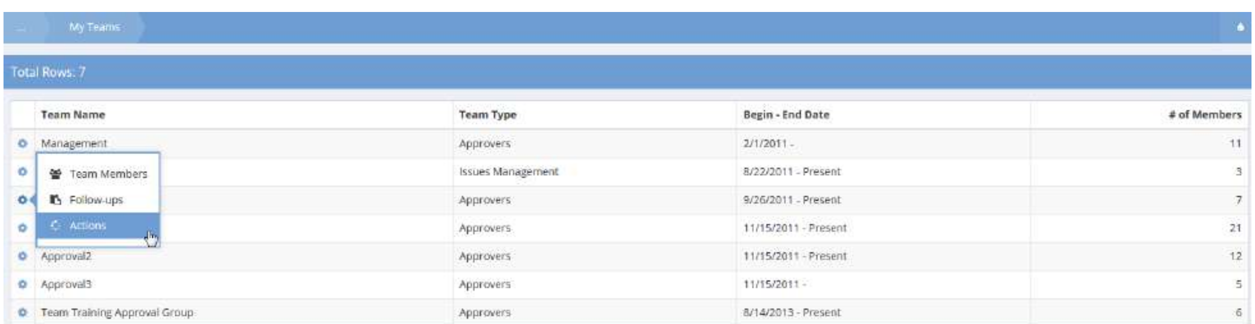
icon leads the user to a list of all teams of which they are a member. From the action gear the user can select the "Members" option to view a list of team members and add others to the team.

Clicking on the "Follow Ups" option displays a list of all clients who have follow ups linked to that team. The hyper-link can be used to navigate to the appropriate form to complete the follow up tasks.

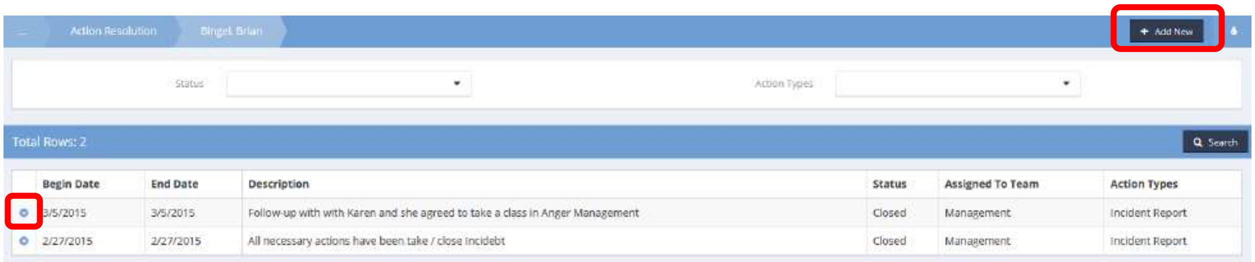


Action Resolution Team Summary

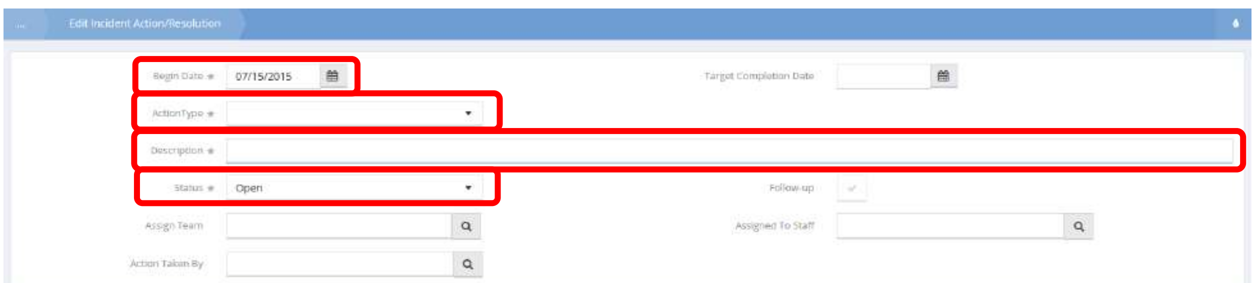
To manage incident actions and resolutions for the user's team, click the action gear icon for the desired team, and select Actions from the pop up menu that appears.



The Action Resolution form displays.



To add a new action, click the Add New button. To edit an existing action, click the action gear icon associated with it and select Edit from the popup menu that appears. Either method displays the Edit Incident Action/Resolution form.

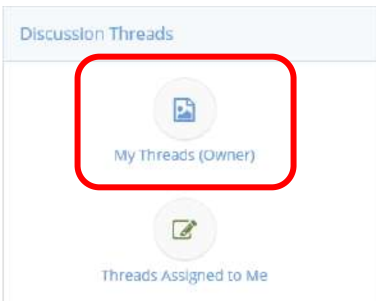


Enter a date, action type, description and status. Click Save when finished.

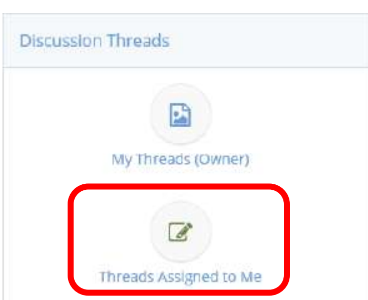
Discussion Threads

Discussion Threads functionality can be implemented in various areas in CaseWorthy™. In brief, users comment on tasks and/or transactions in the system and journal the comments in a thread. In baseline, this functionality is implemented on incident report approval processes. Once a user is included in a discussion thread, they can view the thread.

Click on the “Discussion Thread”  icon in the My CaseWorthy area.



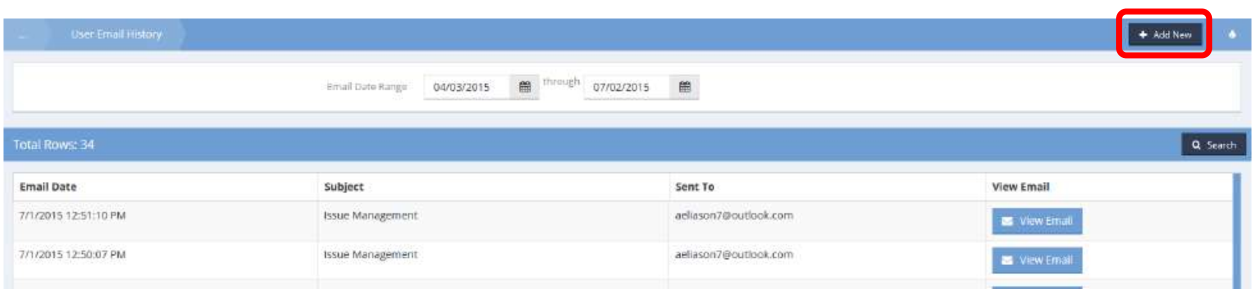
Two icons are available to view discussion threads, “My Threads (Owner)” and “Threads Assigned to Me”. Appropriate lists present based upon the user’s selection.



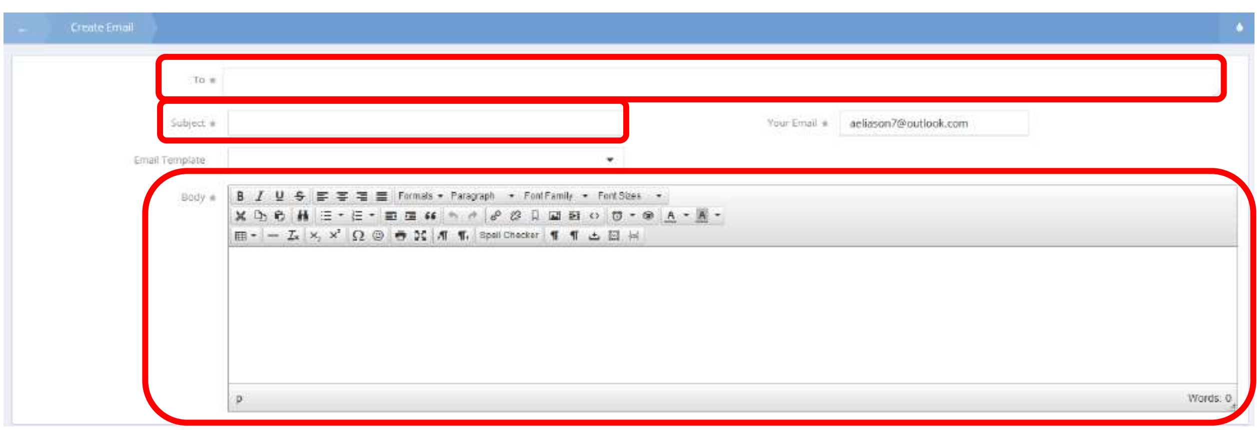
Email History

Clicking the "Email History" Email History icon opens the email history summary form. This form displays all emails that involve the logged-in user. Click the View Email button to see all email details.

To create a new email, click the Add New button.



The Create Email form displays.



The Your Email field automatically fills with the user's email. Enter the desired recipient(s) email(s) in the To field, enter a Subject and enter the message in the Body field. Use a template if desired. Click the Send button when finished to send the email.

Bulletin Board History

Click on the Bulletin Board View History 

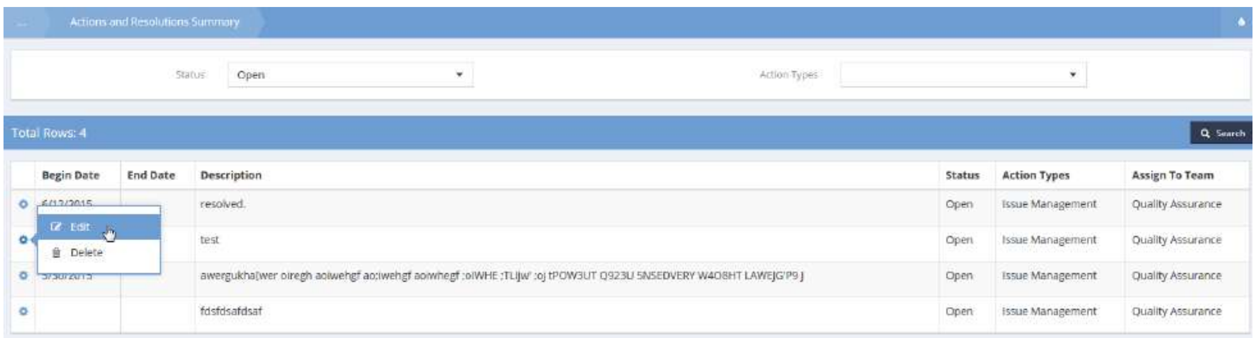
icon. The View Bulletin Board History form displays a list of previously viewed bulletin board messages so the user may refer back to it if desired.

Actions / Resolutions

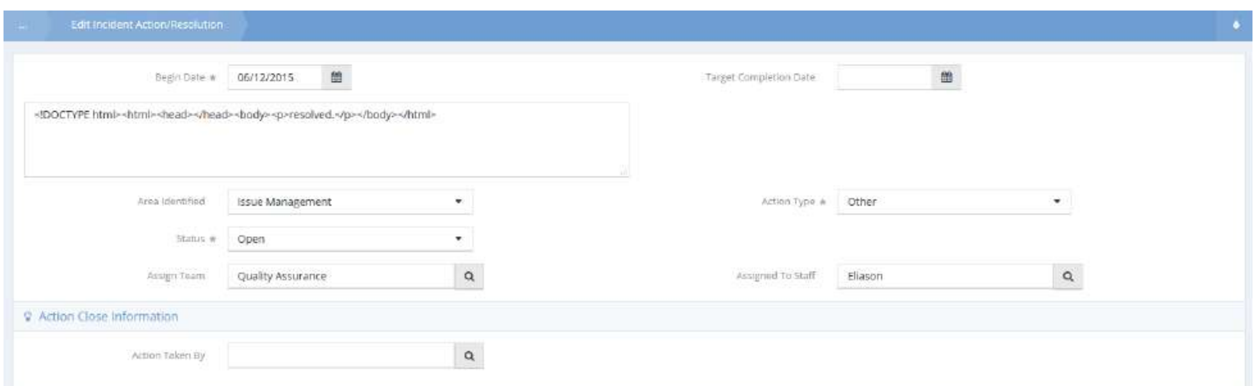
Objective: Manage user issue action resolutions.

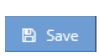
Click the icon 

for Actions / Resolutions. The Actions and Resolutions Summary form displays. To edit an action and resolution, click the action gear  icon associated with the desired action or resolution and select Edit from the pop up menu that appears.



The Edit Incident Action/Resolution form displays.



Make any desired changes and click 

when finished.

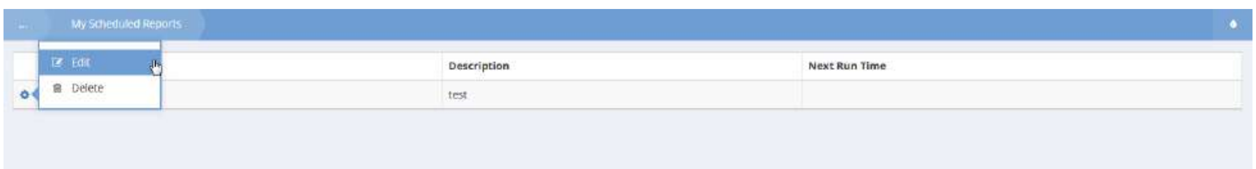
My Scheduled Reports

Objective: View and edit scheduled reports.

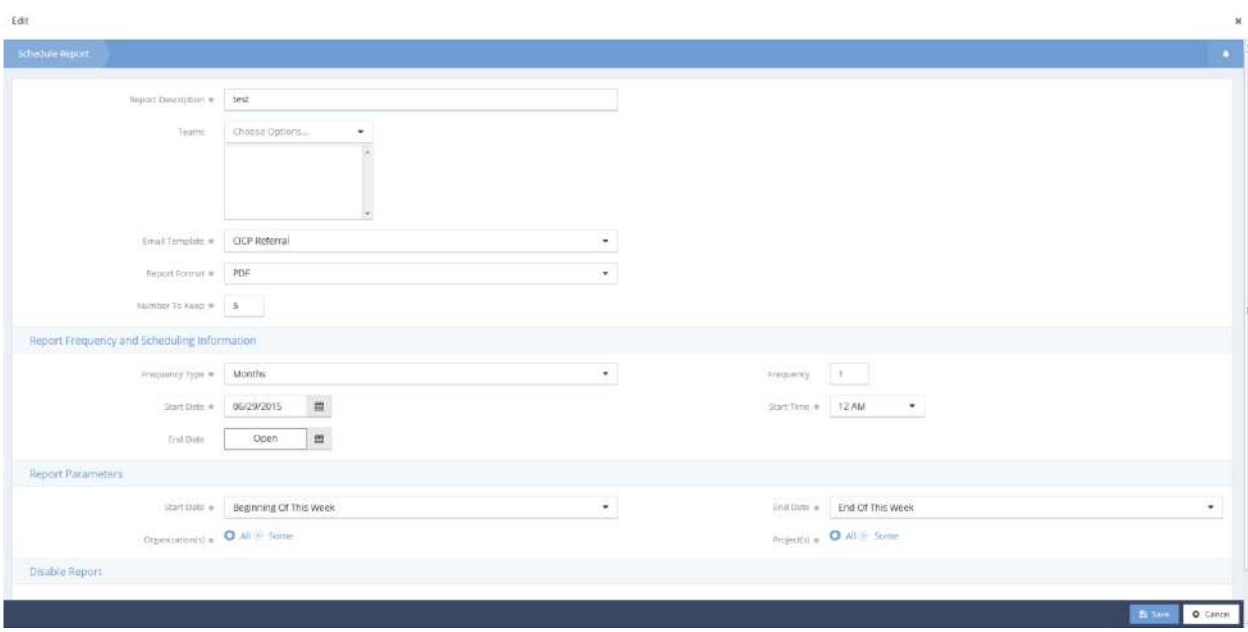
Click the icon 

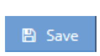
for My Scheduled Reports. The My Scheduled Reports form displays a list of any of the current user's previously scheduled reports.

To edit a scheduled report, click the action gear icon and click Edit.



The Edit Schedule Report form displays.



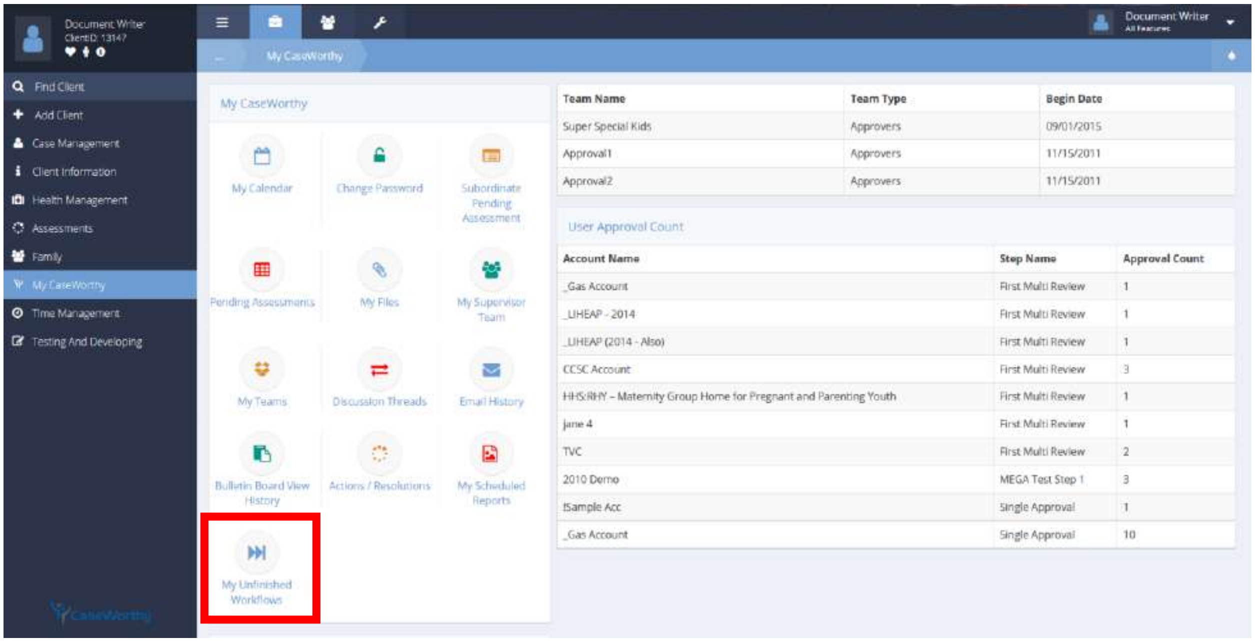
Make any changes and click the 

button when finished editing.

My Unfinished Workflows

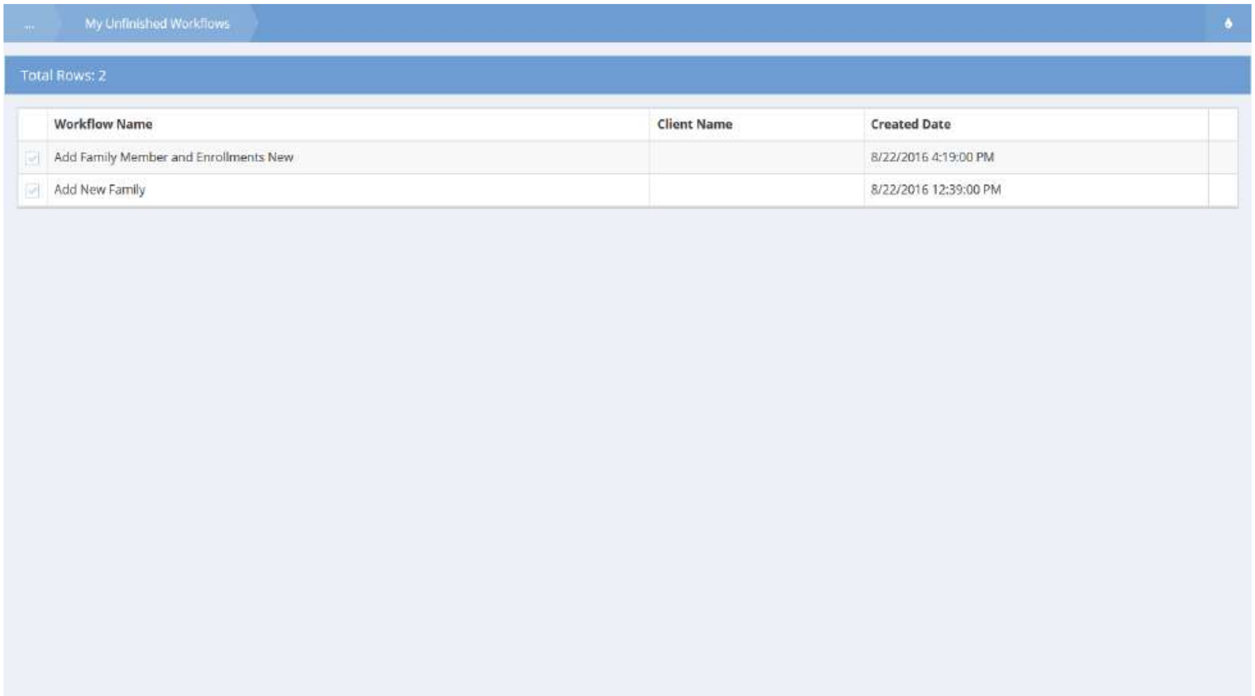
Objective: View unfinished workflows.

Navigation: Case Management>My CaseWorthy>My CaseWorthy



Select My Unfinished Workflows from the My CaseWorthy dashboard.

The My Unfinished Workflows form displays.

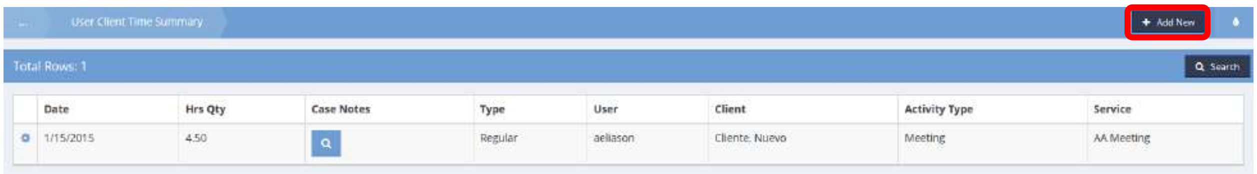


Select any desired workflow for completion from the list of all incomplete workflows. The workflow opens. If no workflow is selected, click the 

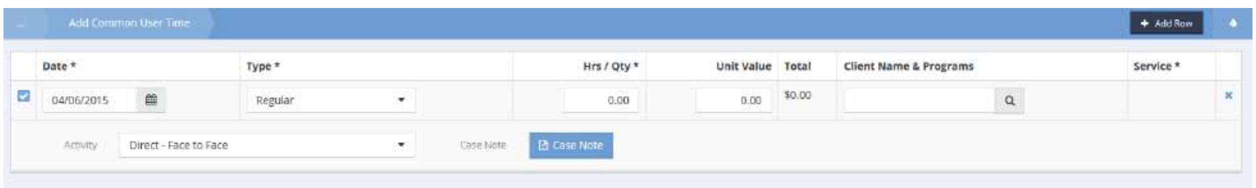
button to leave the form.

Time – Clients, Programs, Services

Click on the Time – Clients, Programs, Services icon Time - Clients, Programs, Services in the Time window. The User Client Time Summary form displays.



To add a new entry, click on the Add New button. The Add Common User Time form displays.

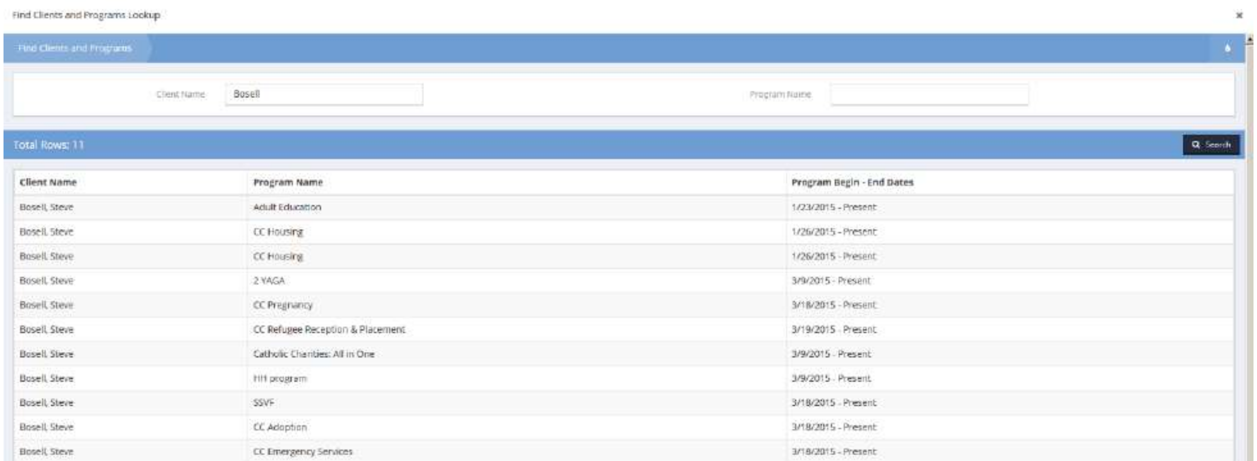


Record the date of the time. Click on the down arrow icon to select the type from the drop-down list that appears. Enter the hours. Click on the Client Name & Program magnifying glass icon.

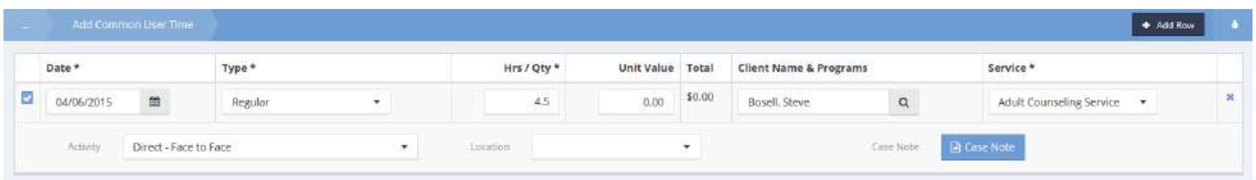
The Client Names and Programs Lookup form displays.

Enter any or all of the Client Name and Program Name and click on the Search button.

Select the desired row from the list and click on it.



The client name is parsed to the previous form. Click on the down arrow icon to select the service from the drop-down list that appears.

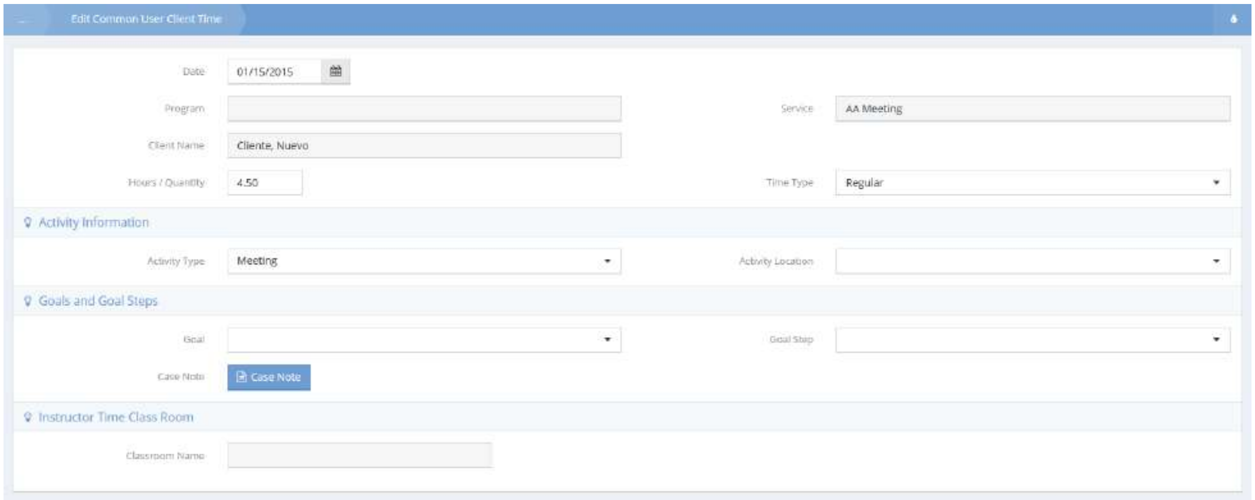


Click on the down arrow icon to select the activity from the drop-down list that appears. Do the same for the location. If desired, click on the Case Note button to add notes regarding this time entry.

When finished, click on the Save button.

To edit time, locate the desired entry and click on the action gear icon associated with it and select Edit from the pop-up menu that appears.

The Edit Common User Client Time form displays. Make any desired changes and click on the  button.

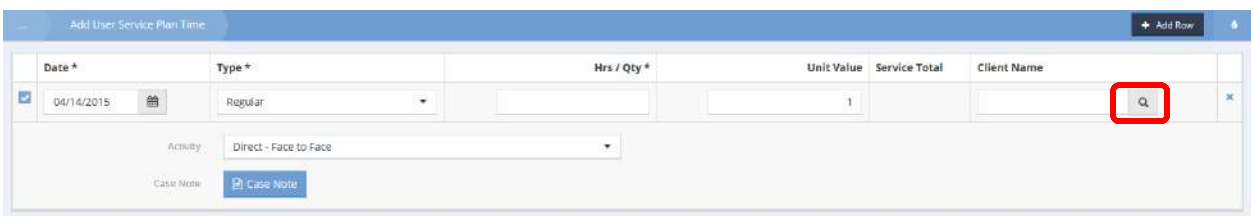


Time – Client, Services,Goals, Steps

Objective: Add, edit or view user service plan time.

Click on the Time – Client, Services,Goals, Steps  Time - Client, Services, Goals, Steps icon in the Time window. The User Time - Client Service Plan form displays.

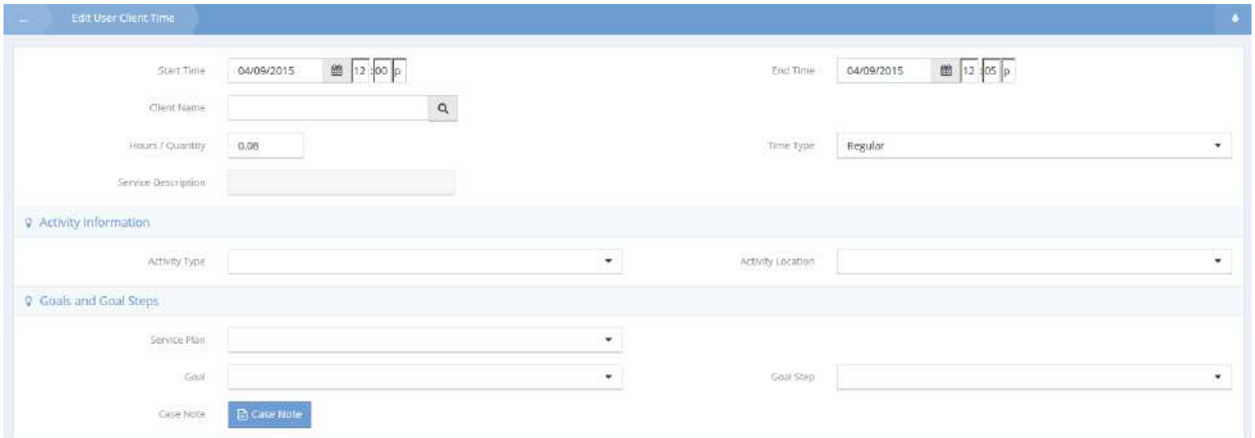
To add service time, click on the **Add New** button. The User Service Plan Time (Add) form Displays.



If the default values are not correct, make any changes desired. Enter the number of hours and click on the magnifying glass icon for client name to select the client receiving the service. Add case notes if desired. Click on the **Save** button.

To edit an existing service time entry, locate the desired service time and click on the action gear icon associated with it. Select Edit from the pop-up menu that appears.

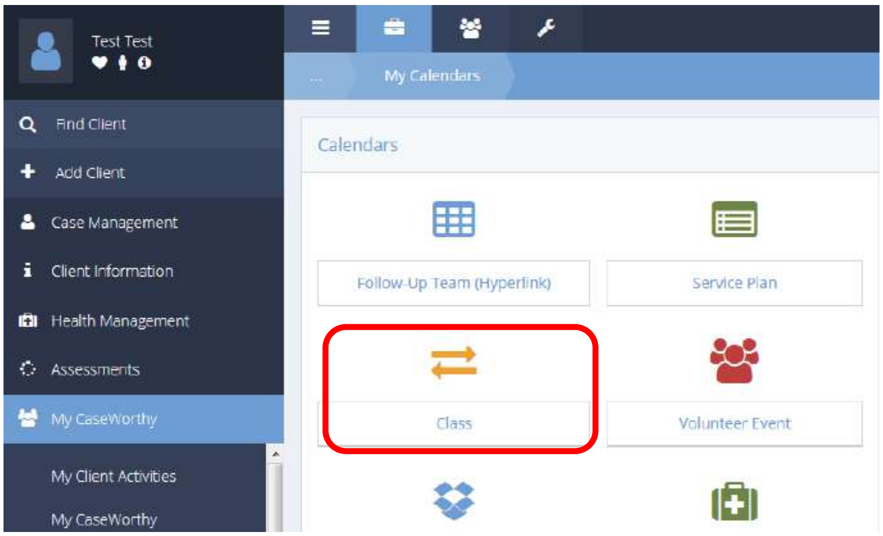
The Edit User Client Time form displays. Make any desired changes and click on the  button.



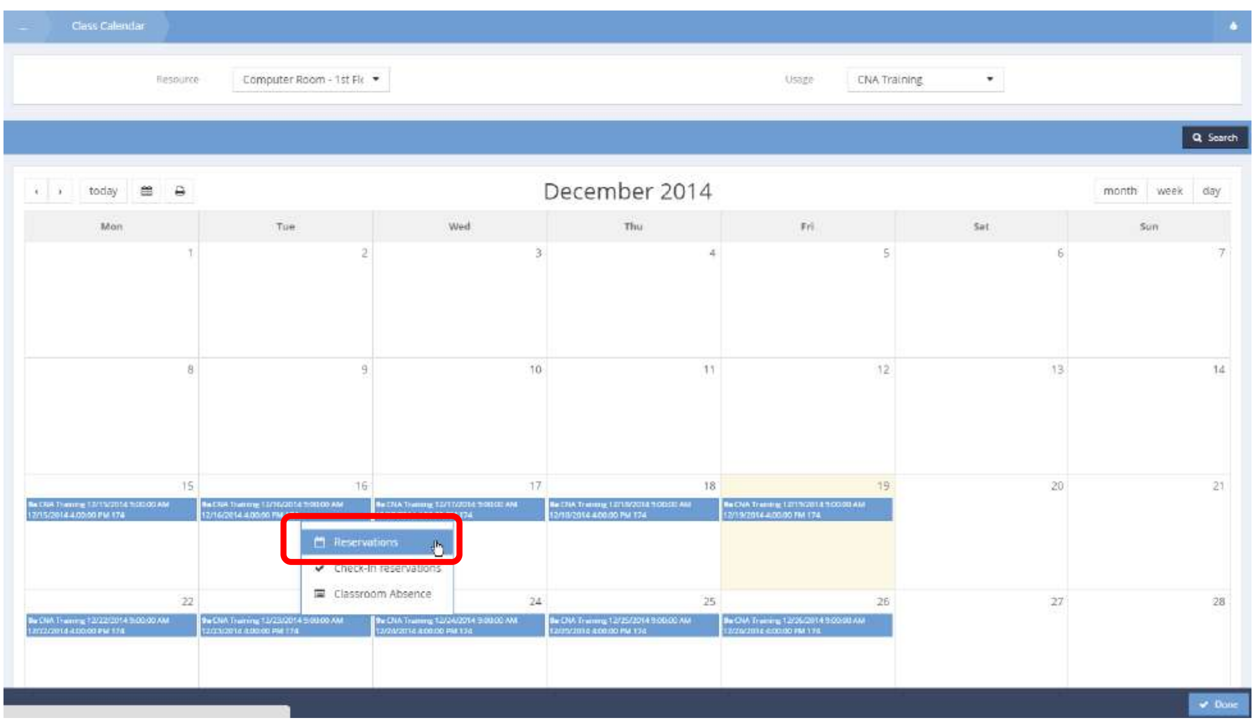
Calendars

In Out Find Client W / Reservation Info

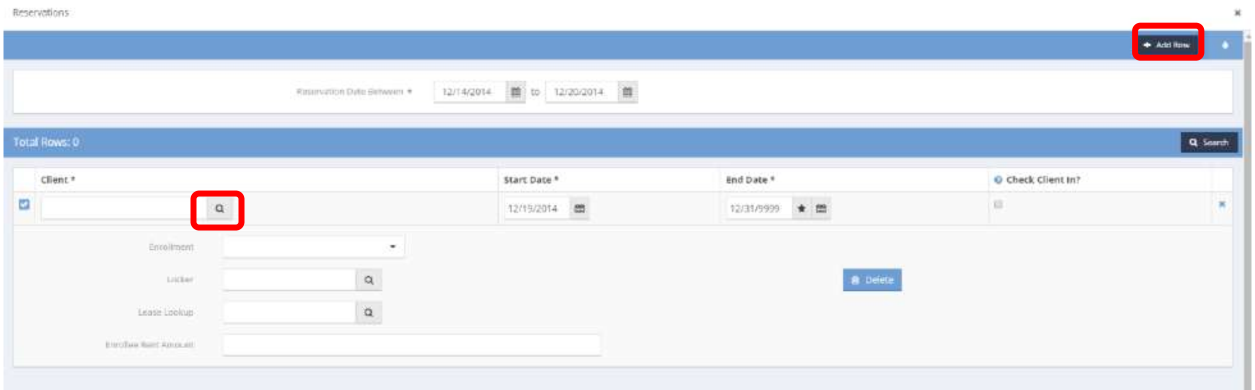
Objective: Look up a client with reservation info. This can be achieved in multiple sections where reservations can be placed, in this example Class is used.



Click on the Class icon. The Class Calendar displays.

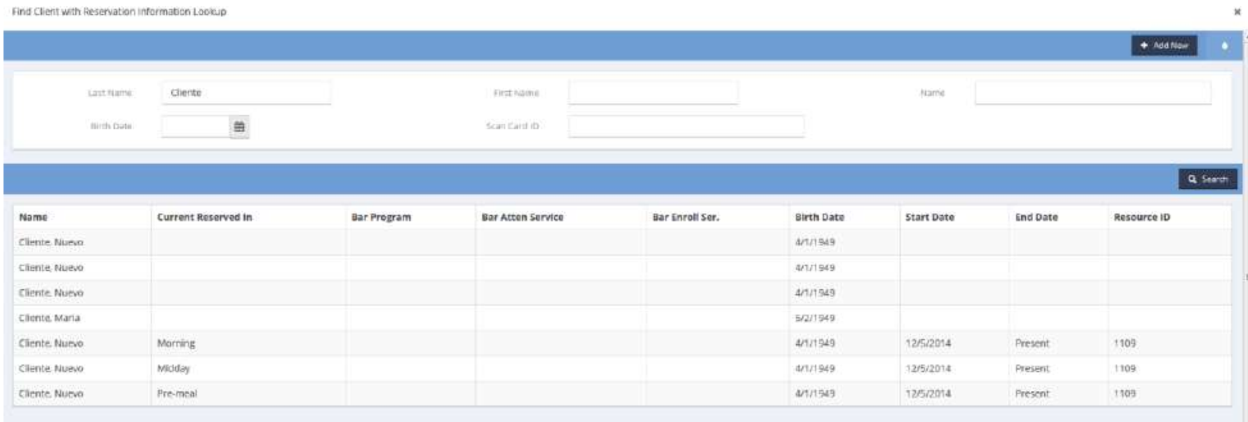


Click a timeslot on the calendar and click Reservations. The Reservations W/ Check-In form displays.



Click the **+ Add Row** button to add a new row if necessary and then click the magnifying glass icon for Client. The Find Client W/ Reservation Info form displays.

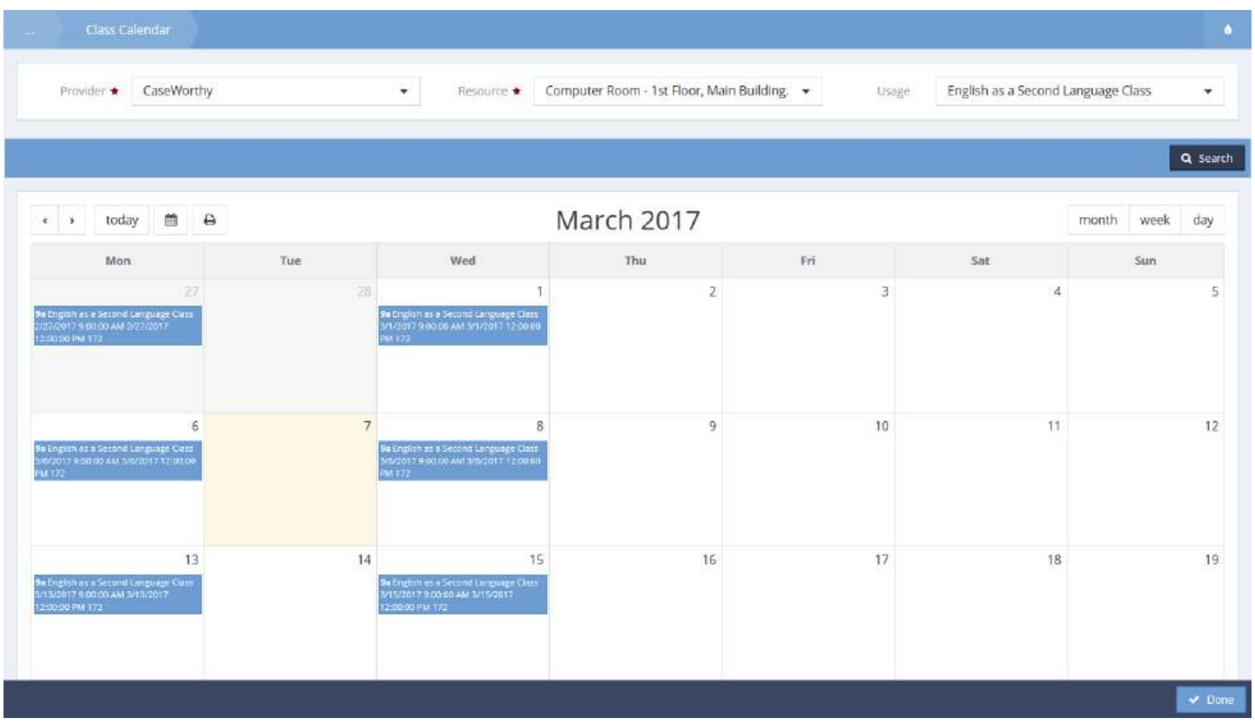
Enter any known fields and click the Search button.



Search results display in the space below the search parameters. Select the desired client by clicking on the row.

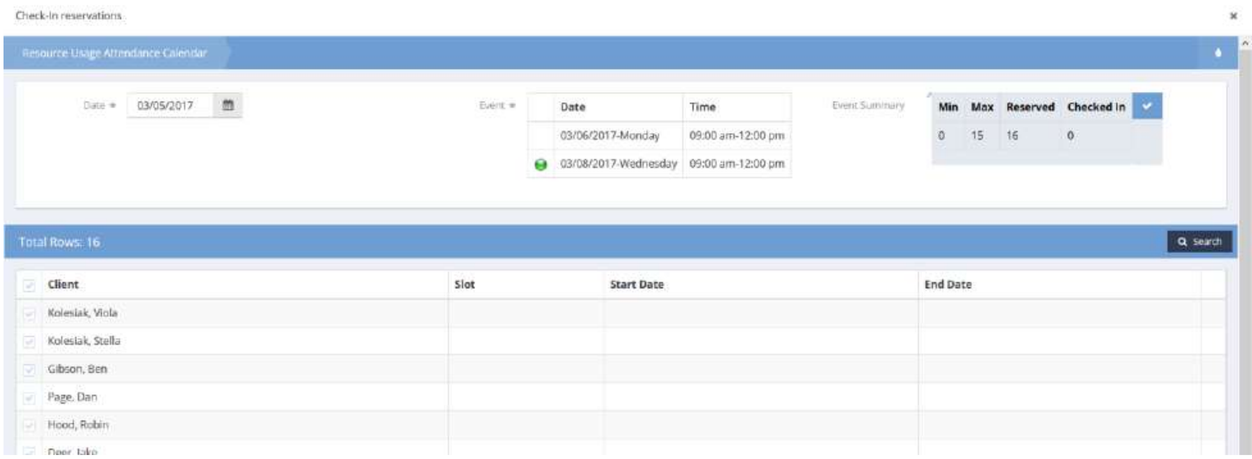
New fields allow the user to indicate tardiness and/or if the student left early from a class.

Select Class Calendar from the My Calendars Dashboard. The Class Calendar form displays. (select a resource and usage to populate)

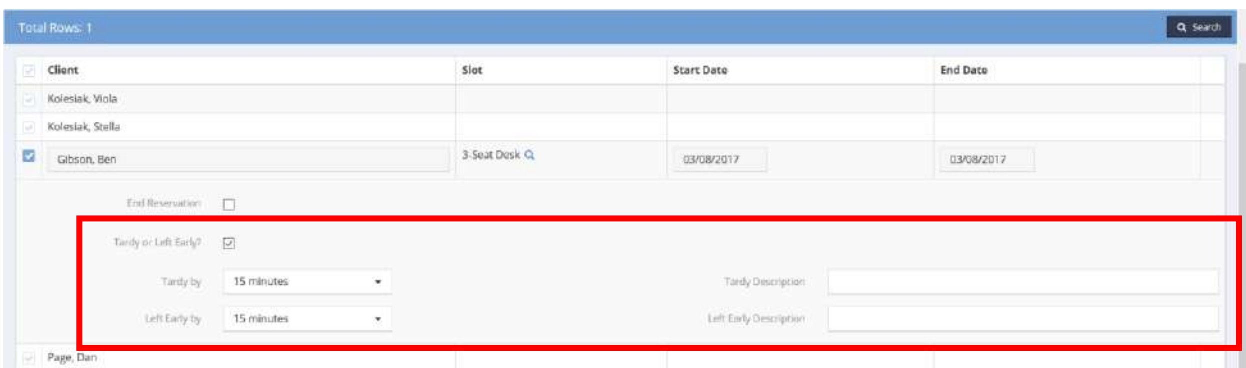


Click on a class and select Check-In Reservations from the menu options.

The Resource Usage Attendance Calendar form displays.



Expand the row on a client to view more options.



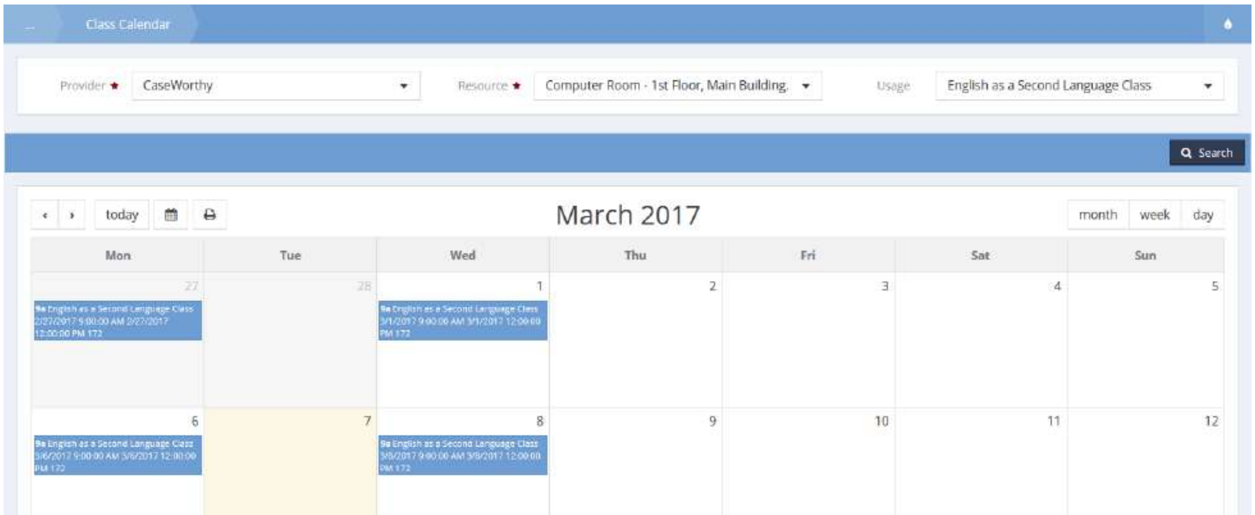
An option to indicate tardiness or if a client left early has been added to this form. Select the Tardy or Left Early checkbox and the Tardy by and Left Early by fields display. Use the drop-down list on these fields to enter the appropriate amount of time. If a time is selected, the descriptions fields display to the right to enter reasons for the tardy or leaving early.

Courses and Tests

Objective: Assign tests to certain classes on certain days and record student's scores for each test.

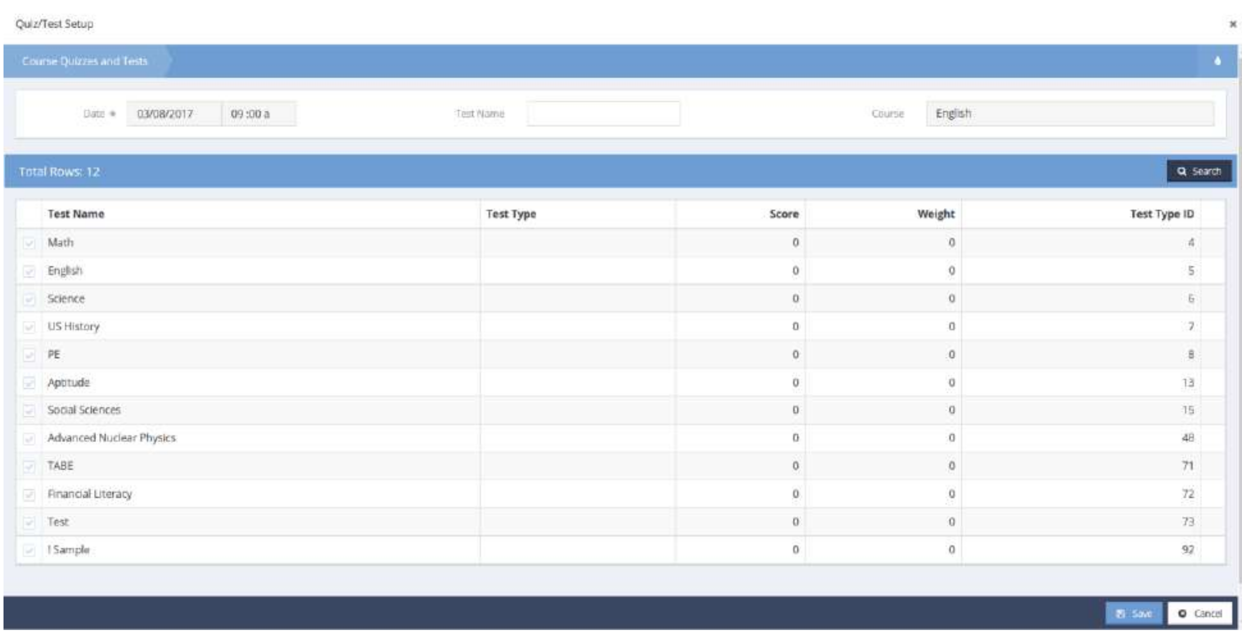
Navigation: Case Management>My CaseWorthy> My CaseWorthy>Calendars

Select Class Calendar from the My Calendars Dashboard. The Class Calendar form displays (select a resource and usage to populate).



Quiz/Test Setup

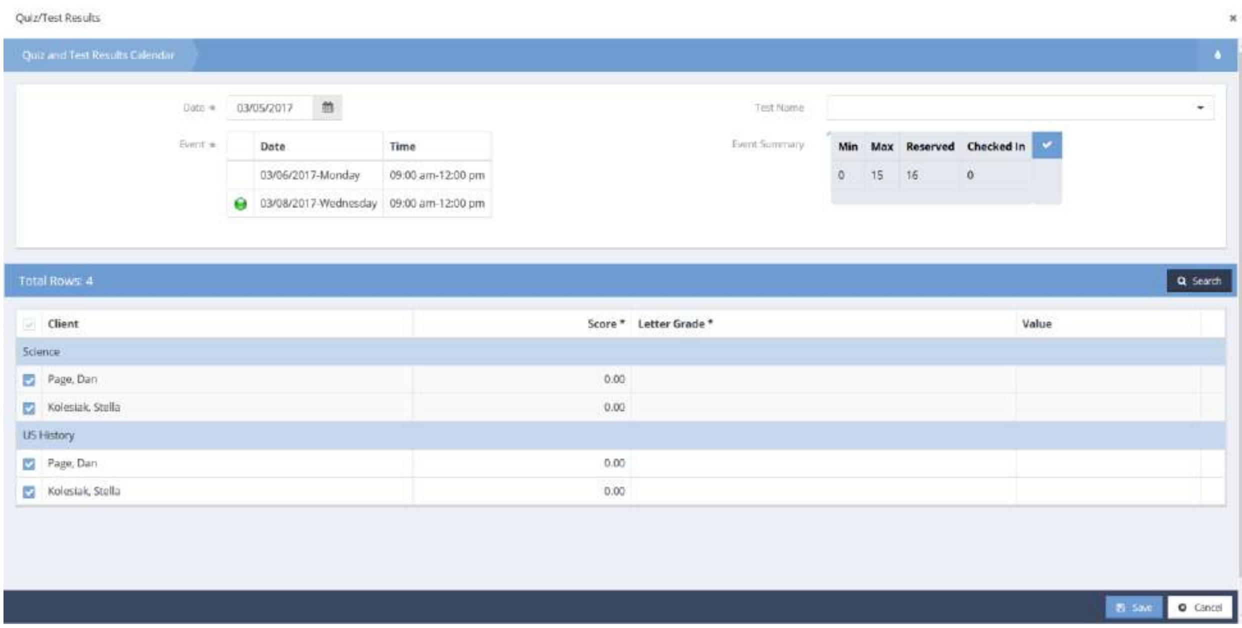
Click on a class and select Quiz/Test Setup from the menu options. The Course Quizzes and Tests form displays.



This form allows a user to indicate any tests that are going to be administered on that particular day for this class. A list of all the tests displays (tests must have a category type Education). Select the desired tests. The Test Type field allows the user to indicate what kind of test it is, test, quiz, mid-term, etc. Enter a score for this test, the score is the total number of points the test is worth.

Quiz/Test Results

Click on a class and select Quiz/Test Results from the menu options. The Quiz and Test Results Calendar form displays.

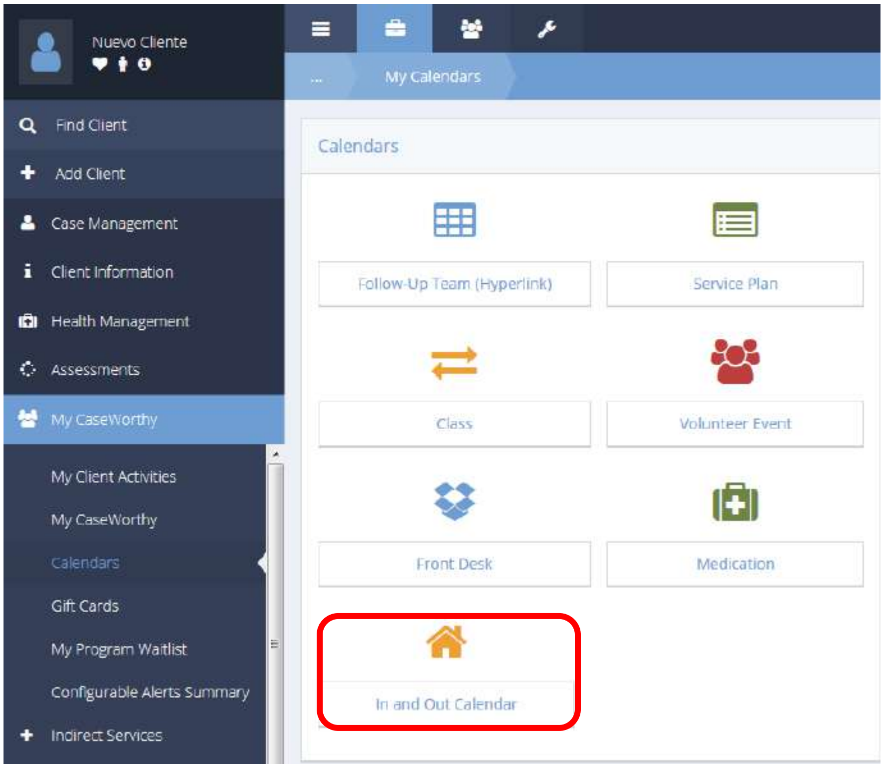


Students who have been checked in to this class on this day, display. Expand a row to enter a score for the student.

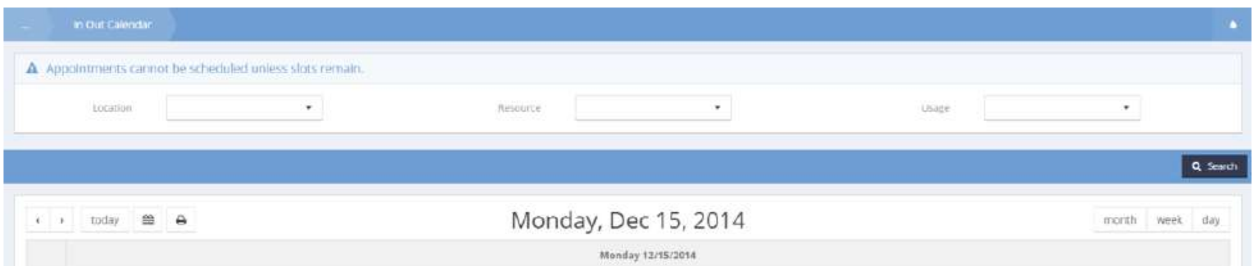
Both a numeric score and letter grade can be entered.

In and Out Calendar

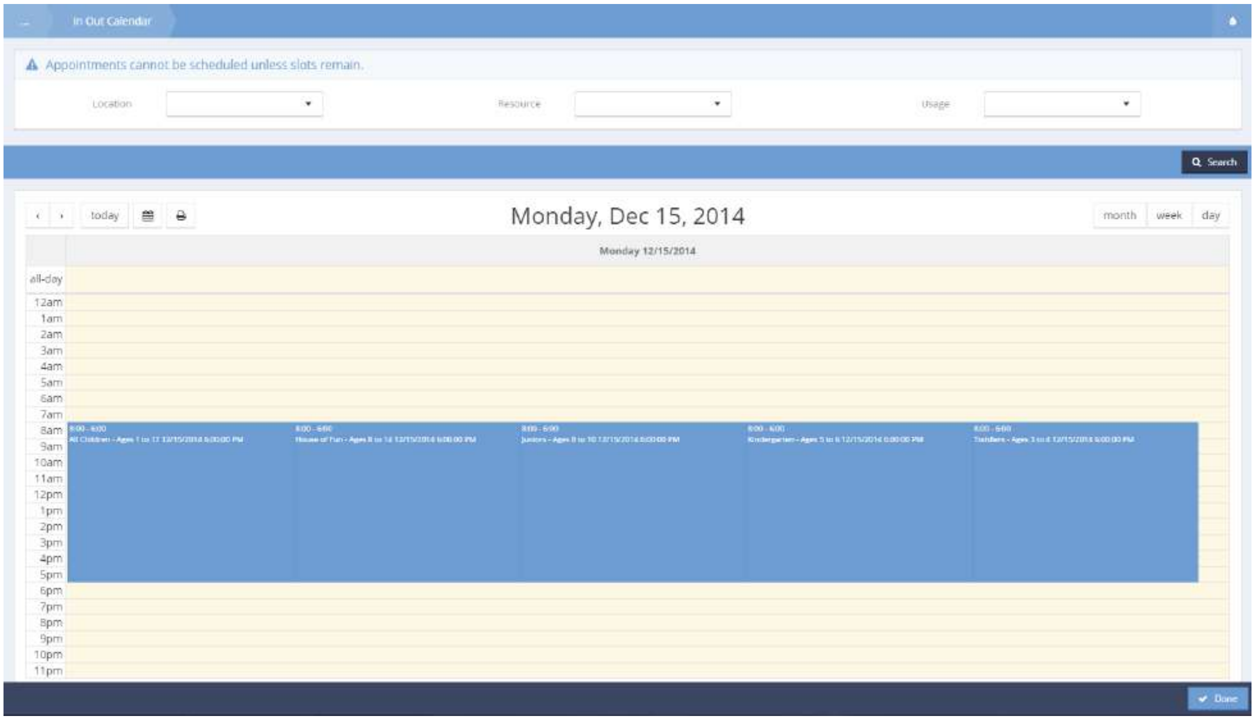
Objective: View the In and Out calendar and generate a roster report.



Click the In and Out Calendar icon. The In Out Calendar form displays calendar events by the day, week or month, filterable by Location, Resource and Usage.

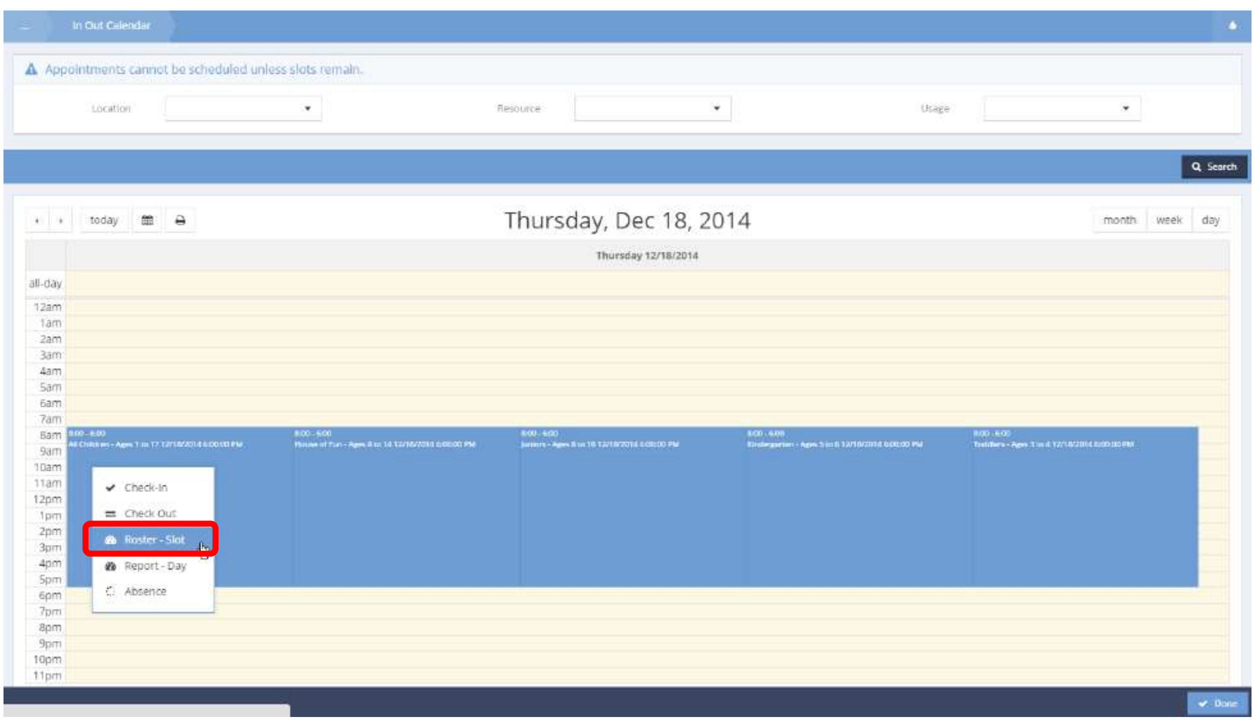


The In Out Calendar set to view a single day with five-day care classrooms.



Event Roster

To view a Roster Report: navigate to the desired date, click on the desired event and click Roster – Slot.



The report displays in a new window.

Roster Report

Run By aeliason - CaseWorthy on 12/18/2014 9:29:04 AM

Report Date 12/18/2014
Organization........................ CaseWorthy
Location............................ In and Out Class

CaseWorthy

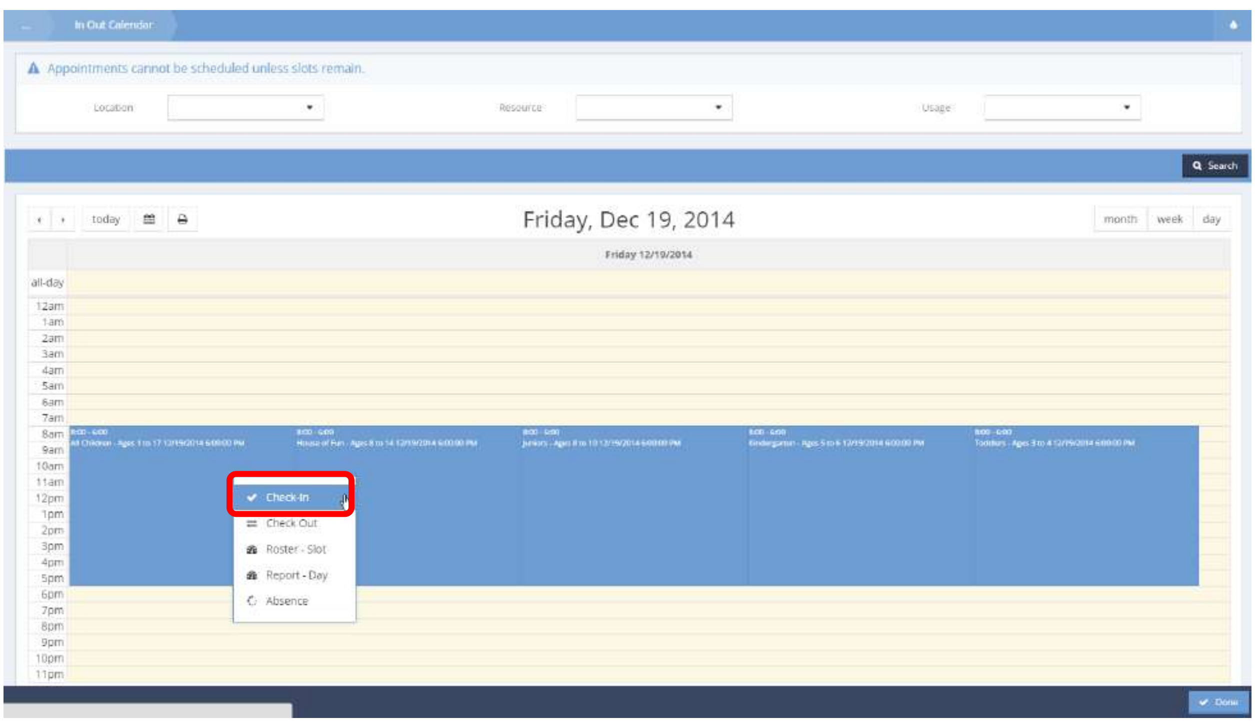
740 East 3900 South
Salt Lake City

Usage Name: All Children - Ages 1 to 17
Resource Name: In and Out Class

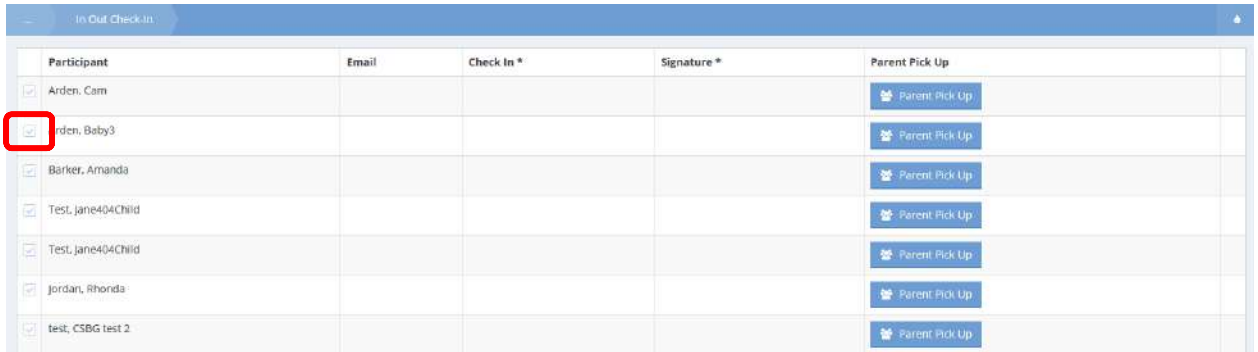
Date	Session	Client	Signature
12/18/2014	12:00 AM - 12:00 AM	Po Tak 'Kai	
12/18/2014	12:00 AM - 12:00 AM	Child Arden	
12/18/2014	12:00 AM - 12:00 AM	Child Arden	
12/18/2014	12:00 AM - 12:00 AM	CSBG test 2 test	
12/18/2014	12:00 AM - 12:00 AM	Baby Balboa	
12/18/2014	1:39 PM - 12:00 AM	Cam Arden	
12/18/2014	12:00 AM - 12:00 AM	Baby3 Arden	
12/18/2014	12:00 AM - 12:00 AM	Amanda Barker	
12/18/2014	12:00 AM - 12:00 AM	Rhonda Jordan	
12/18/2014	12:00 AM - 12:00 AM	Jane404Child Test	
12/18/2014	12:00 AM - 12:00 AM	Jane404Child Test	

Participant Check In

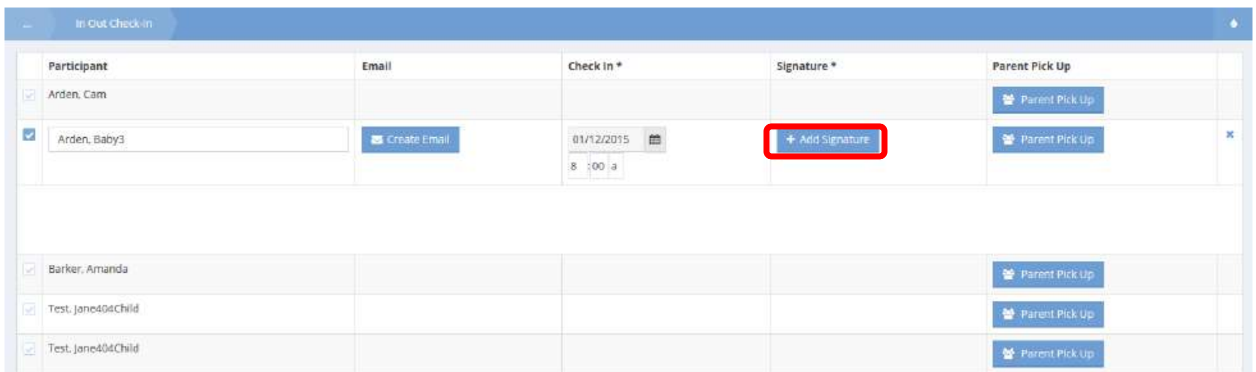
To check in a client, click a timeslot on the calendar and select Check-In.



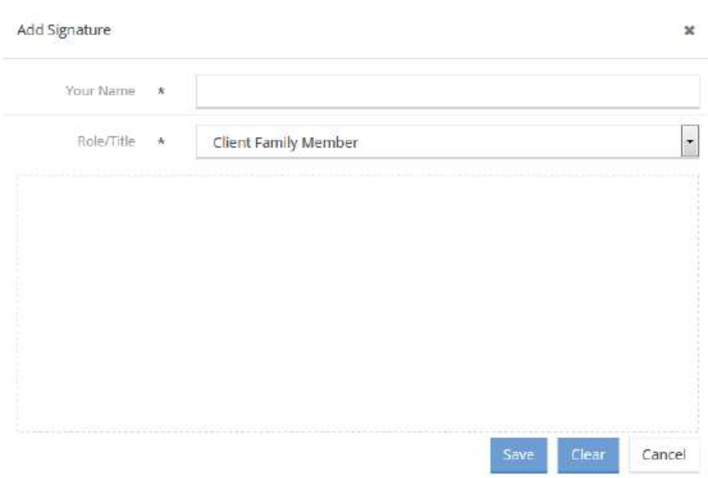
The In Out Check-In form displays.



Click the clear checkbox to check in a participant. The field expands.



Select a check-in time and click the + Add Signature button. The Add Signature form displays in a new window.


Add Signature

Your Name *

Role/Title * Client Family Member

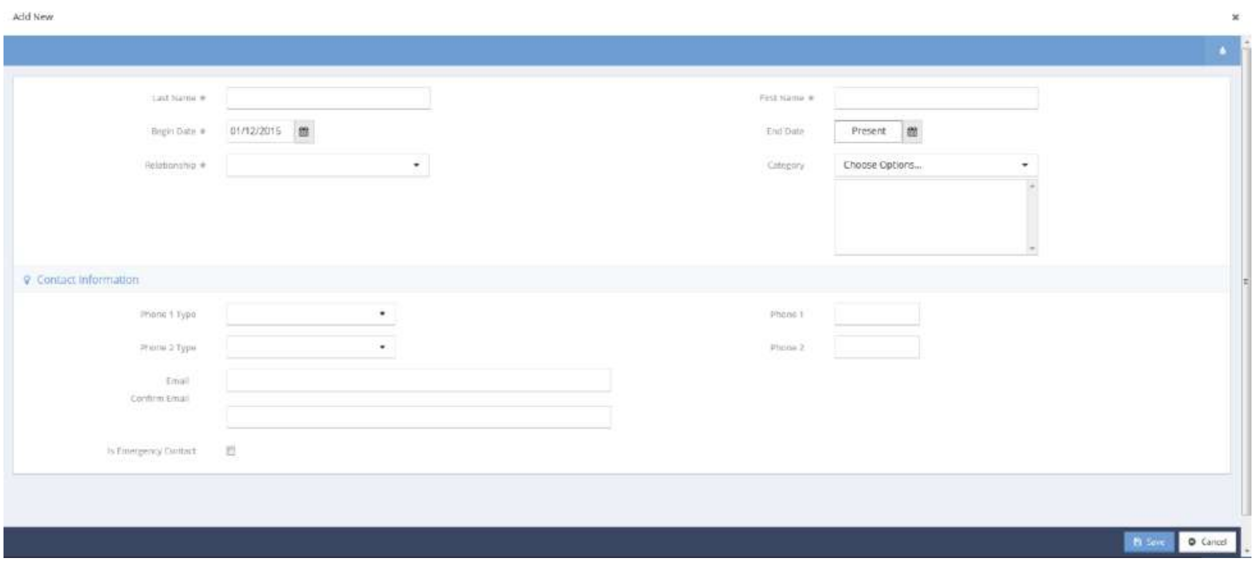
Save Clear Cancel

Enter the appropriate name, select a role/title and sign the form. Click the Save button. Click Save on the In Out Check-In form when finished checking participants in.

Participant Pick-up

Click the Parent Pick Up button. The Parent Pick Up form displays.

Click Add New to add a new pick-up contact. The Add Client Contact form displays in a new window.

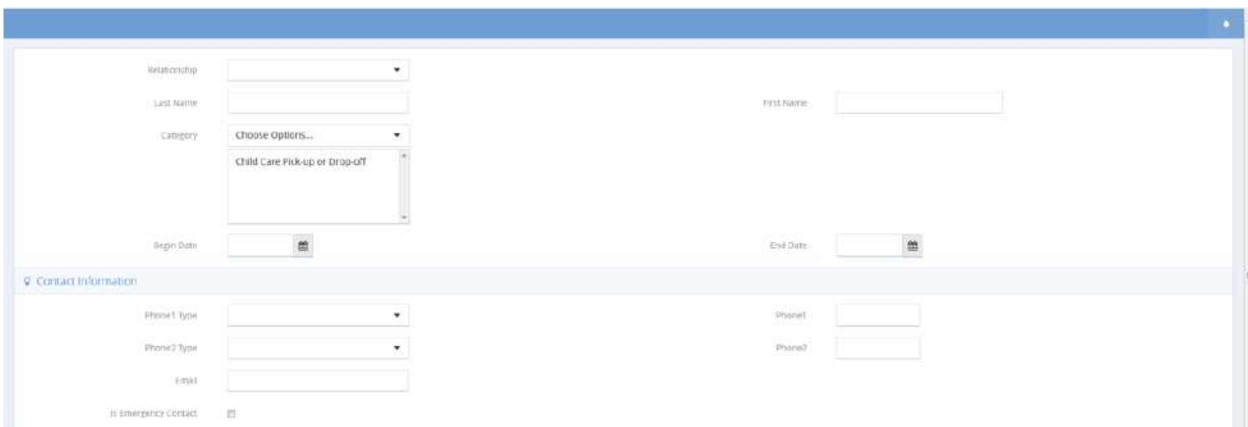


Enter a first and last name, begin date, and relationship. Click the Save button.

The window closes and the Parent Pick Up form displays.

To edit an existing contact, click the action gear  and select Edit from the pop up menu that appears.

The Edit Client Contact form displays.



Make any necessary changes and click the 

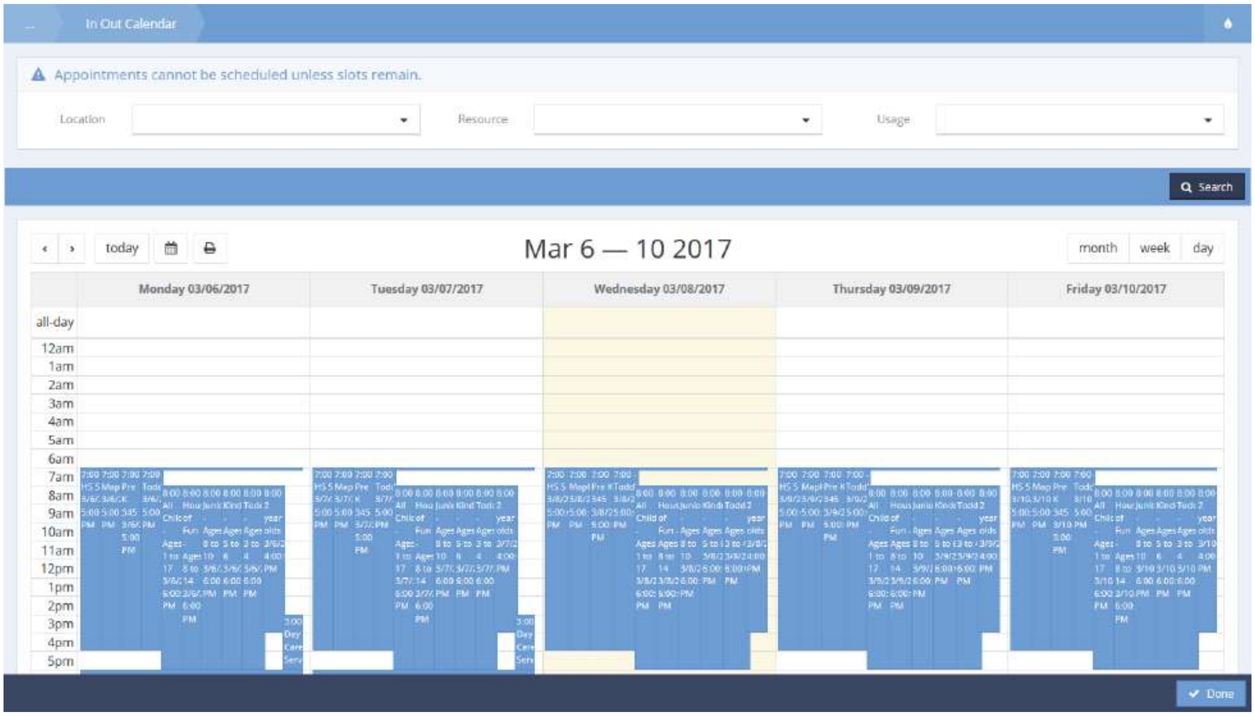
button.

Participant Check-Out

Objective: Check-out a client from a class.

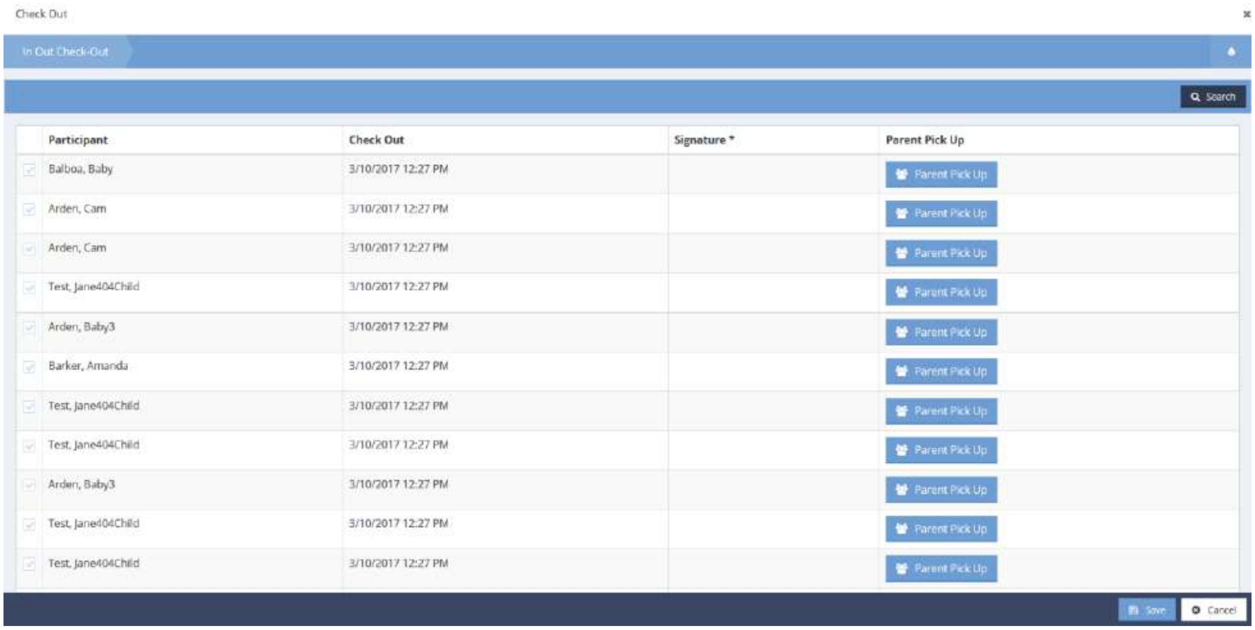
Navigation: Case Management>My CaseWorthy>Calendars>In and Out

The In Out Calendar form displays.



Click on a desired event and select Check Out from the menu options that display.

The In Out Check-Out form displays.



A list of all clients that have been checked in, displays. Select a client to check them out. The row expands.

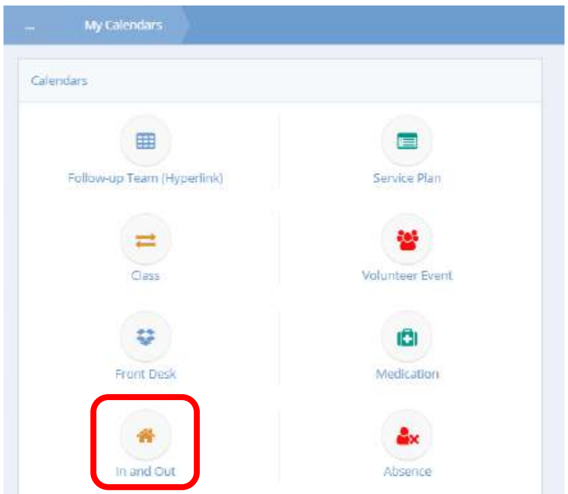
Update the check-out date, add a signature, case note, and/or email. Use the 

button to indicate who picked up the client, if applicable. Save and close.

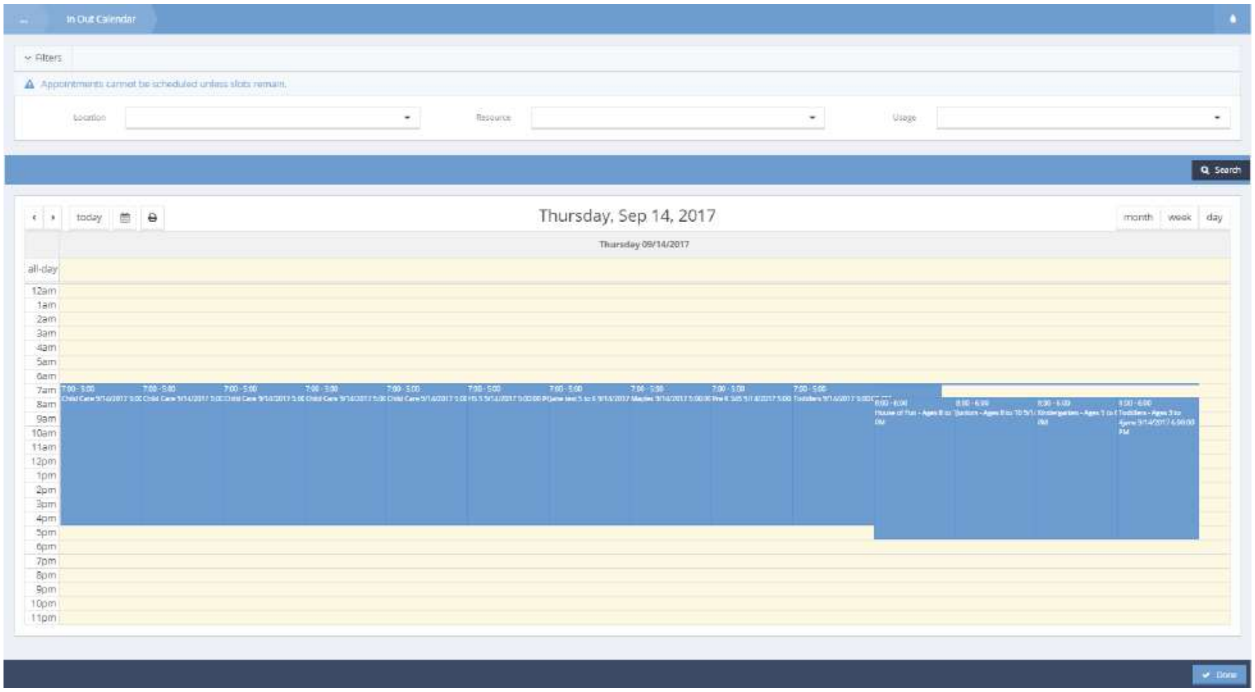
Check-In

Objective: This is an updated check in form for the In/Out calendar. It is used to check people into an event or class with a signature.

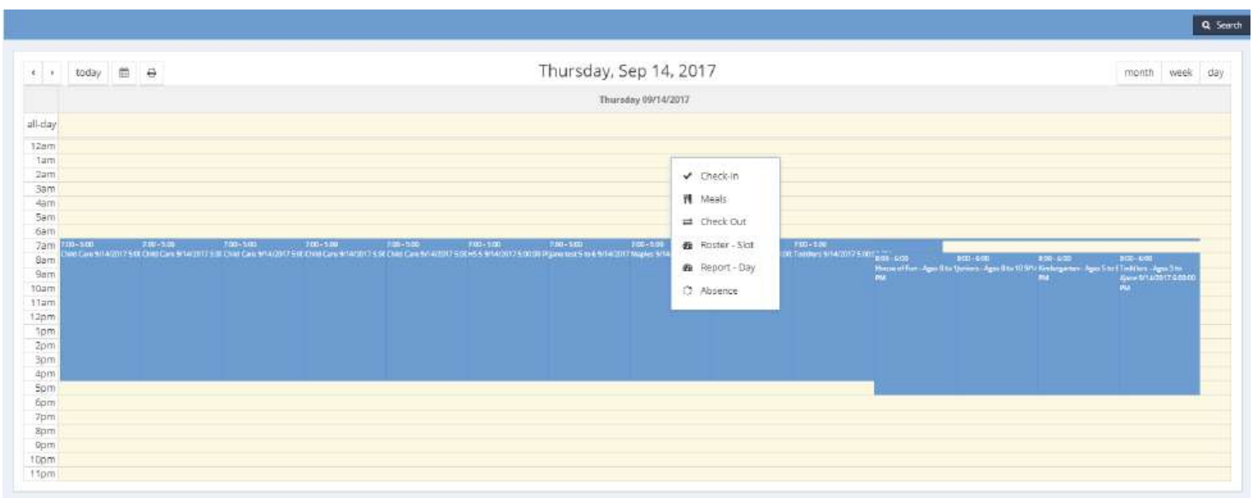
From the My Calendars dashboard, click on the icon labeled In and Out.



The In Out Calendar appears.

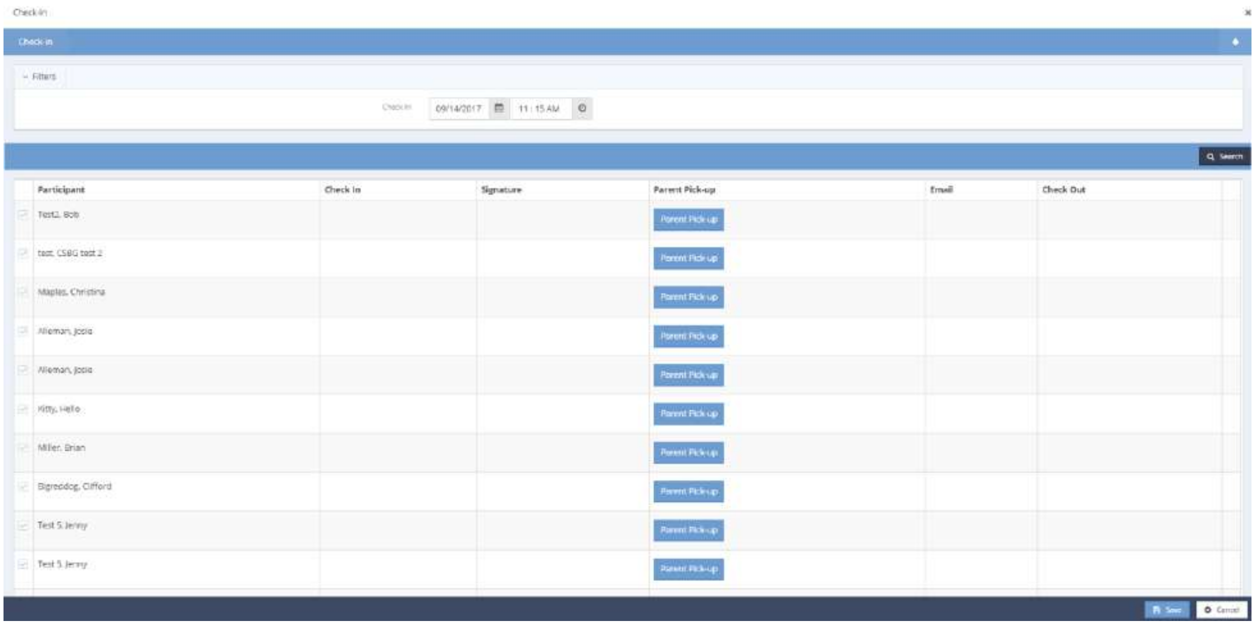


Click on an event. A pop-up menu appears.

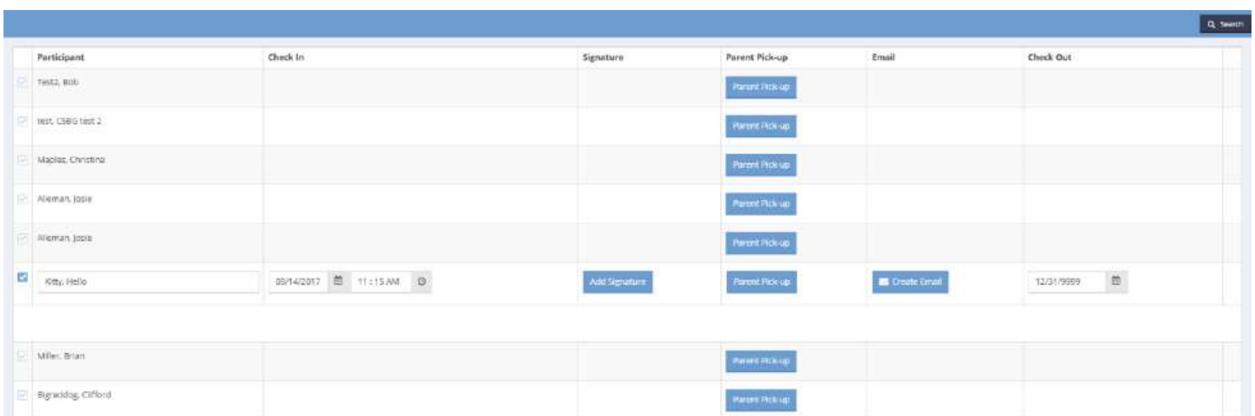


Click Check-In.

The Check In form displays.

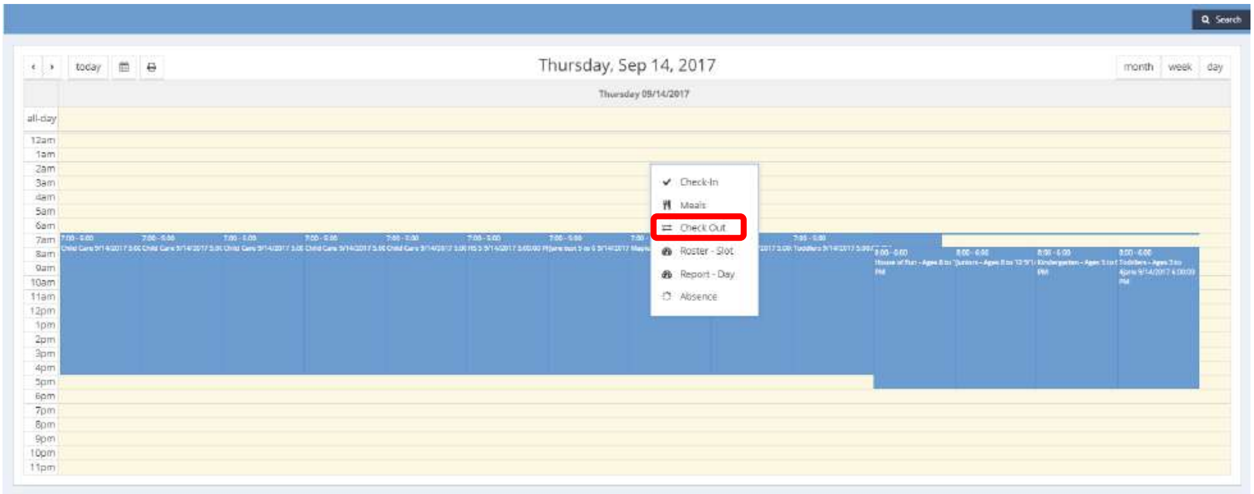


Click the icon next to the desired client. The row expands and the icon turns blue.

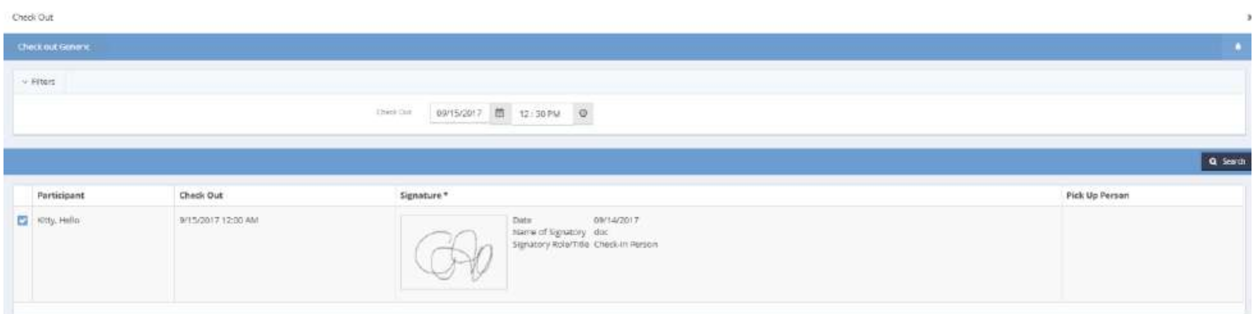


Click on the date and time icons to adjust the check in date and time. Click the Add Signature button to add a signature. Click the Parent Pick-up button to choose a parent. Use the date button in the Check Out column to specify a check out date. Click the Save button to save and close the form and return to the In Out Calendar.

The In Out Calendar displays.



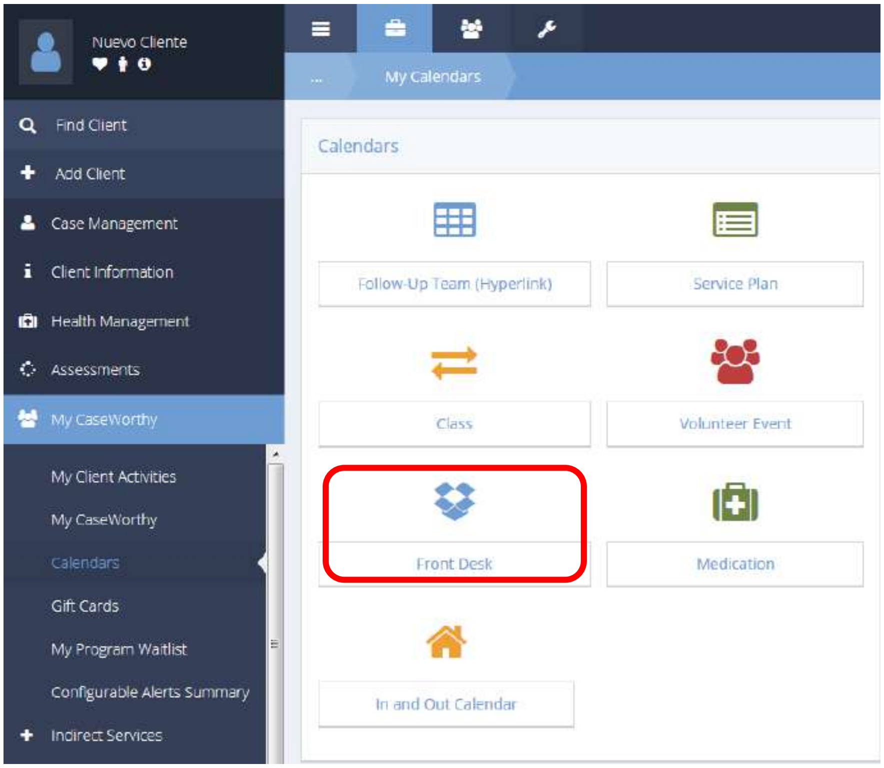
To check out a client, click Check Out. The Check out Generic form displays a list of all checked in clients.



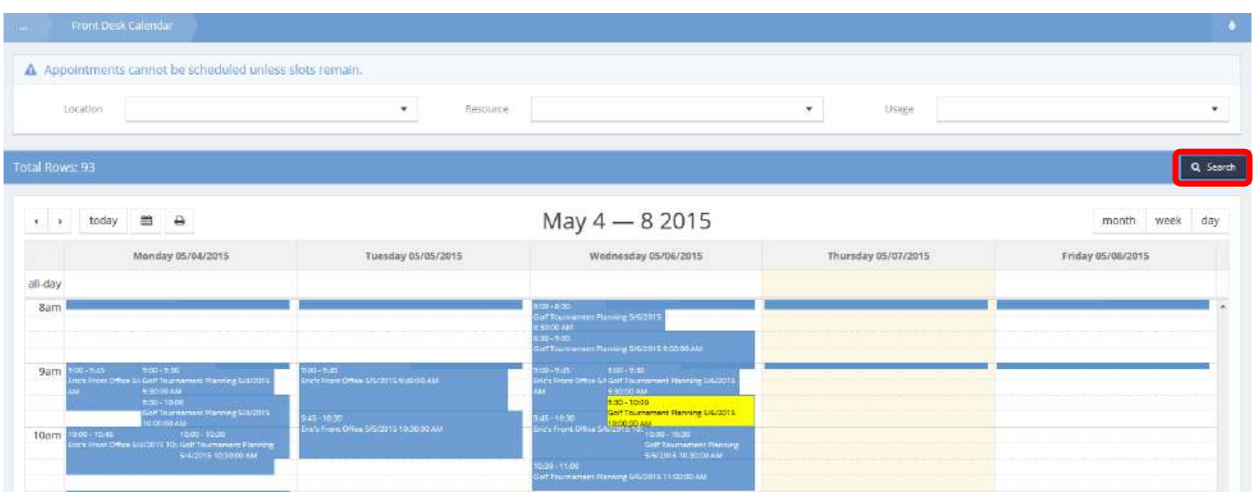
Click the date and time icons to adjust the check out date and time. Click the Save button to save and close the form.

Find Client with Reservation Info

Objective: View client reservation information when setting an appointment for service to verify that the client doesn't already have a reservation.

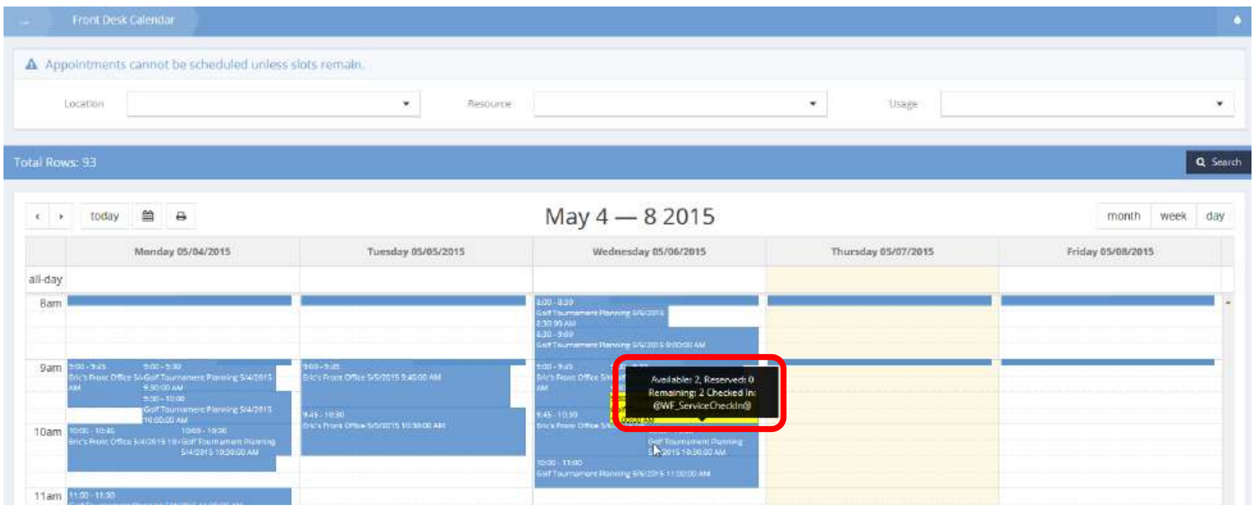


Click on the Front Desk icon on the Calendars menu. The Front Desk Calendar form displays.

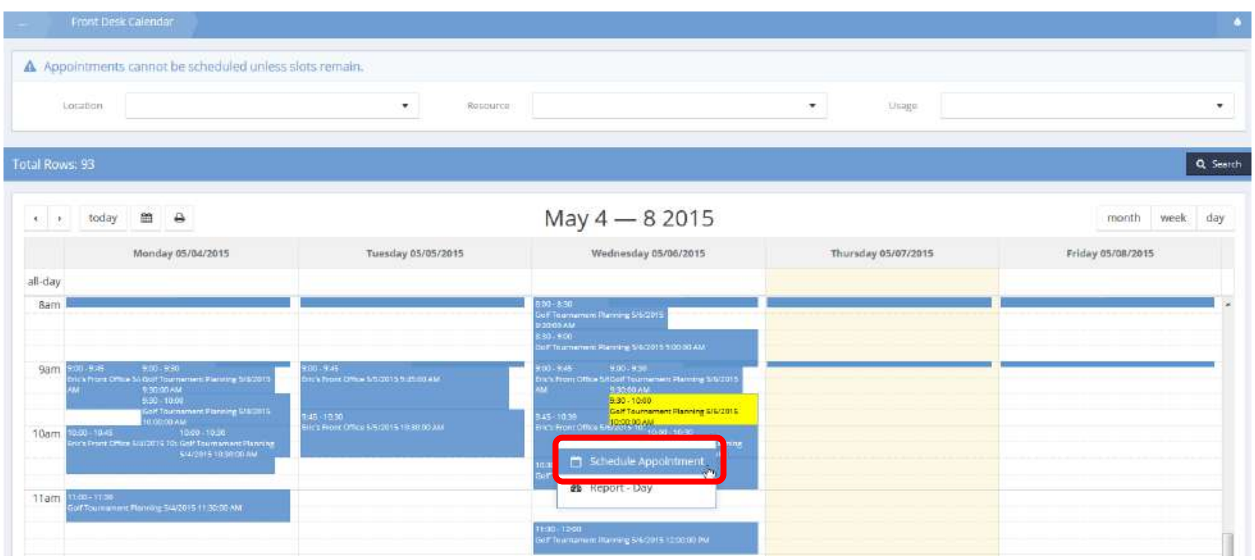


To limit the events displayed, select filter values from the three fields in the calendar header: Location, Resource and Usage. Click on the Search button. Alter the display by date or by time frame (month, week or day).

With the desired events displayed on the form, hover over the desired event. Availability information pops up in a small window.



Click on the desired event. A pop up menu displays.



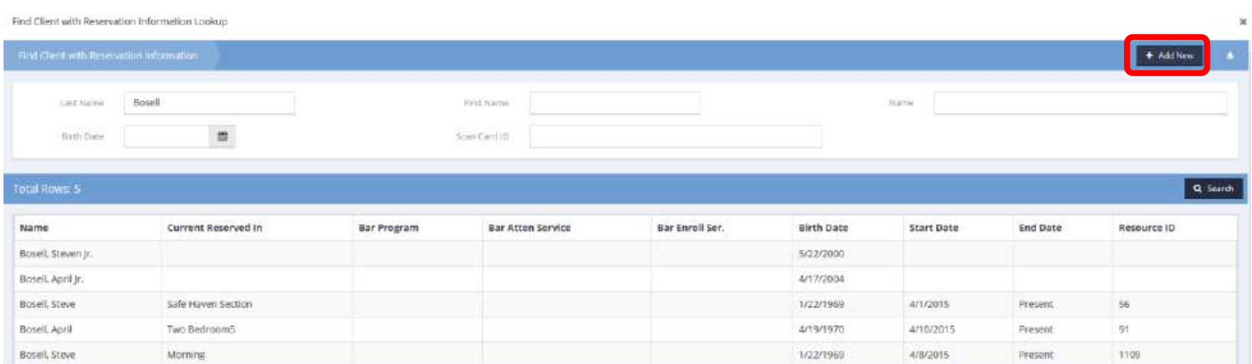
Select Schedule Appointment.

The Schedule Appointment form displays in a new window.

Click on the magnifying glass icon.

The Find Client with Reservation Info Lookup form displays.

To locate the desired client, enter any or all of the name and click on the Search button. Alternatively, click on the Add New button to add a new client. The form displays a list of clients matching the search criteria.



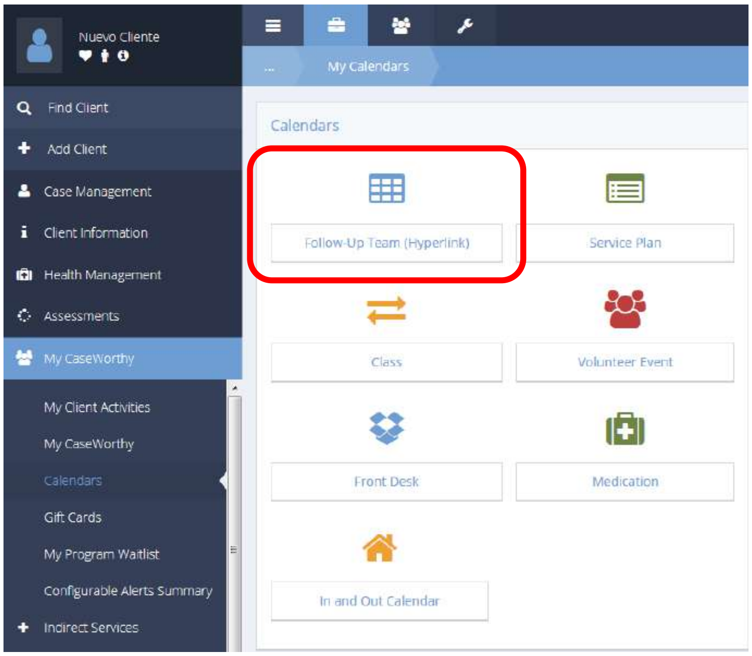
The data presented indicates if the client is currently reserved or not. If the desired client is already currently reserved, click on the button to exit the form.

If the desired client is not currently reserved, click on the row for that client.

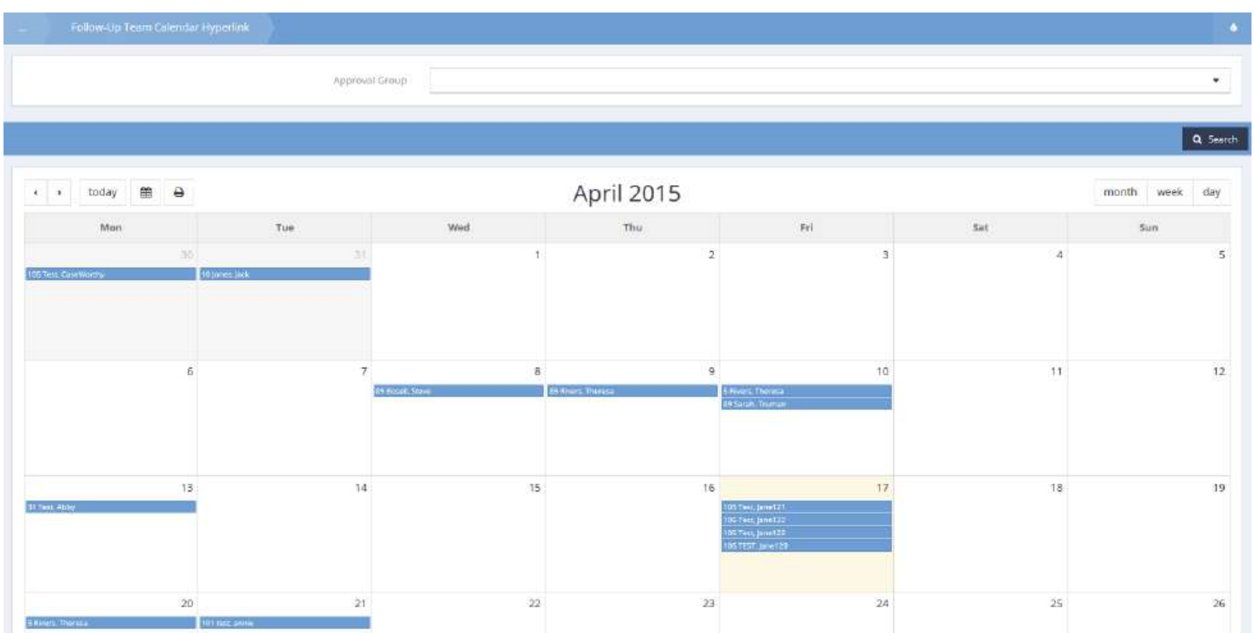
With the client name in place, alter the dates if desired. To check the client in to the service now, click on the "Check Client In?" checkbox. Click on the Save button.

Issue Follow-up

Objective: View, edit or delete issue follow-up information.

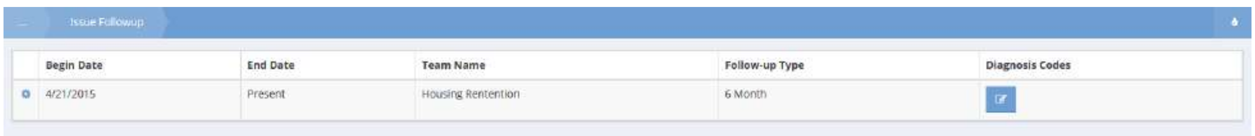


Click on the Follow-Up Team (Hyperlink) icon on the Calendars dashboard menu. The Follow-Up Team Calendar (Hyperlink) form displays.

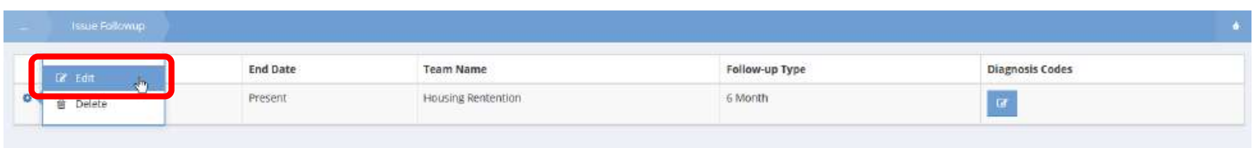


Click on the desired appointment or calendar event and select Diagnosis Codes from the pop up menu that appears.

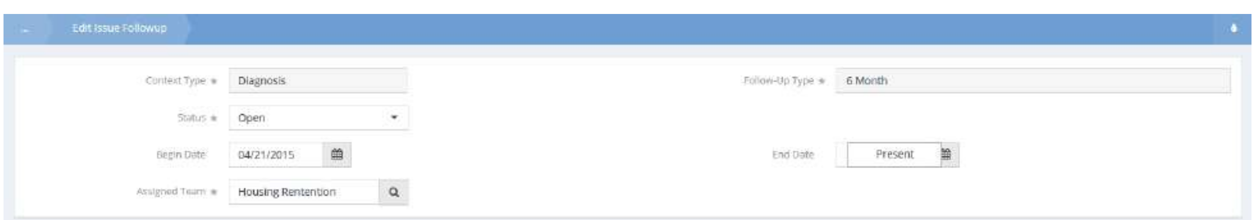
The Issue Follow Up form displays.

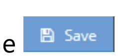


Click on the action gear  icon associated with the desired issue and select Edit from the pop up menu that appears.



The Issue Follow-up Edit form displays.

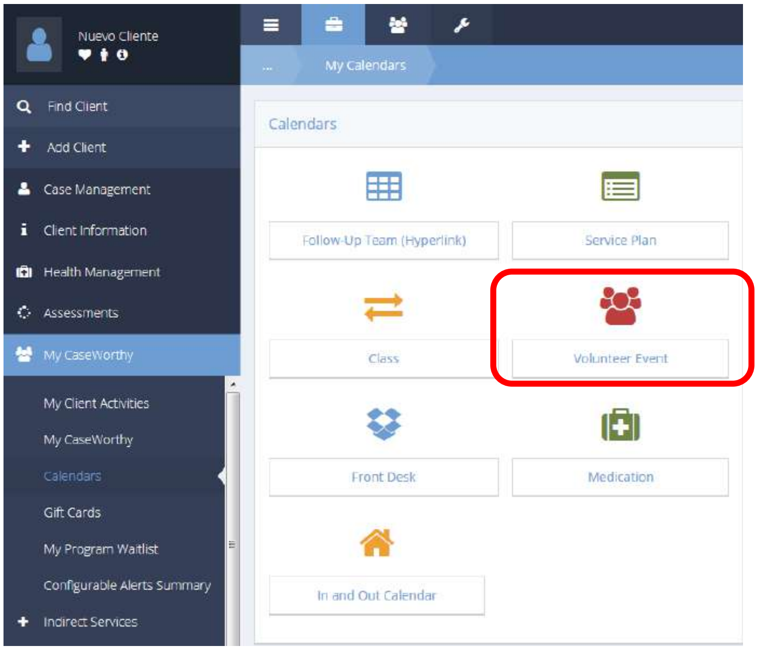


Record any follow up information regarding the issue and click on the 

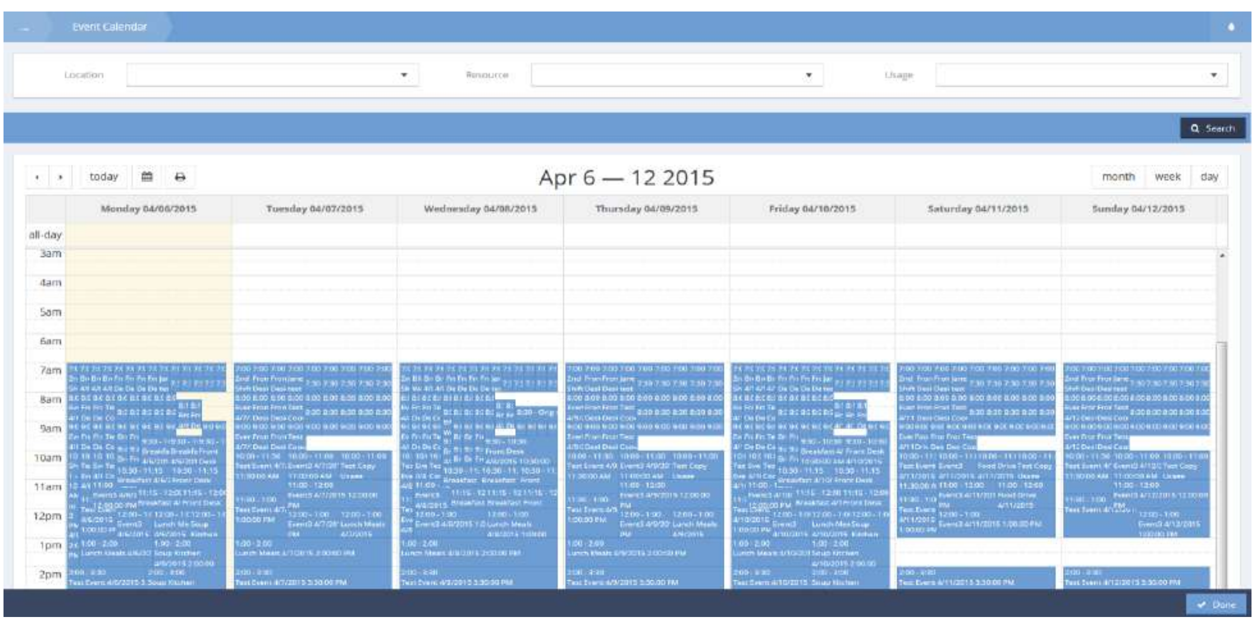
button.

Event Calendar

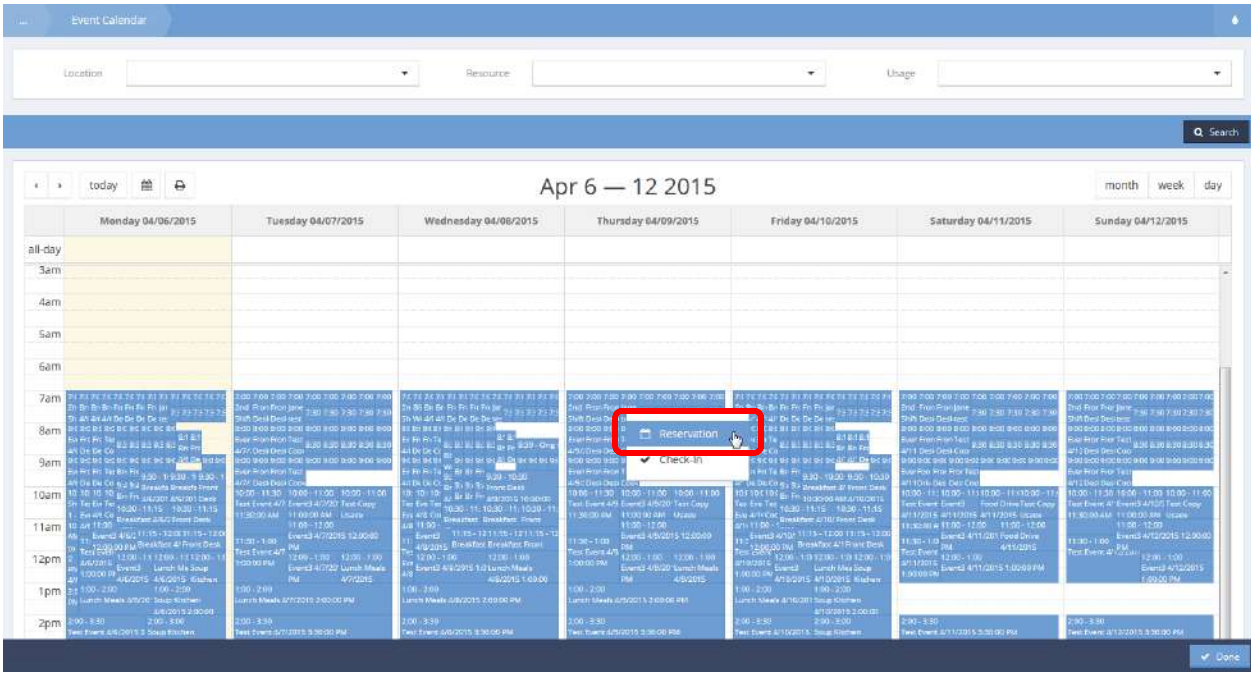
Objective: Make reservations and check-in participants to events.



Click on the Volunteer Event icon in the calendars window. The Event Calendar form displays.



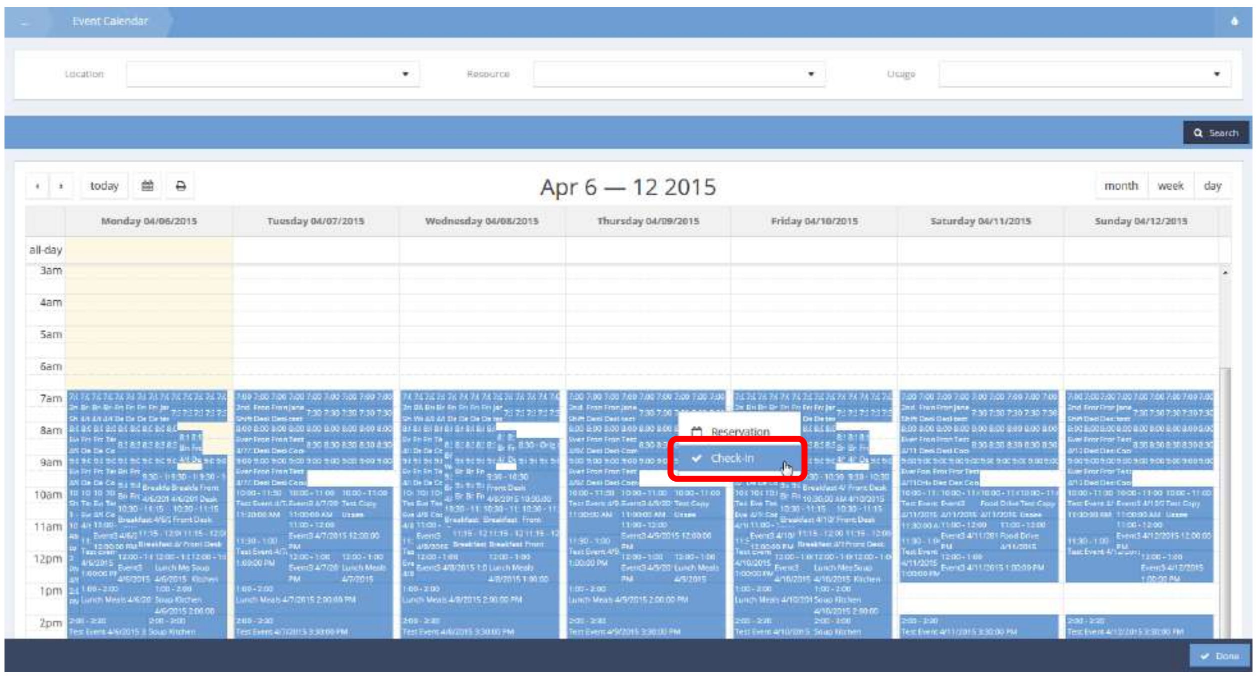
Click on an event. A pop up menu appears.



Select Reservation from the menu. The Reservation form displays.

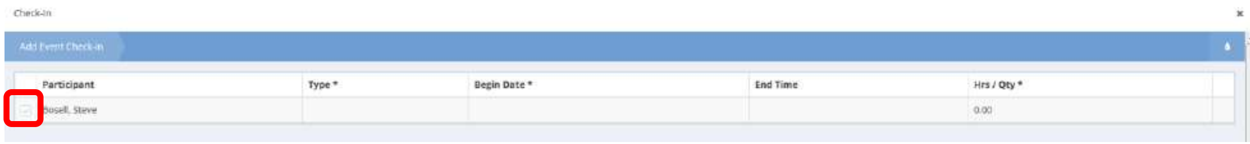
Click on the **+ Add Row** button. A new row appears. Click on the magnifying glass 🔍 icon. The Participant Lookup form displays. Select the desired entity type from the drop-down list. Optionally enter some or all of the desired participant name or the birth date. Click on the **🔍 Search** button.

Select the desired participant from the list provided. Click on the Save button.

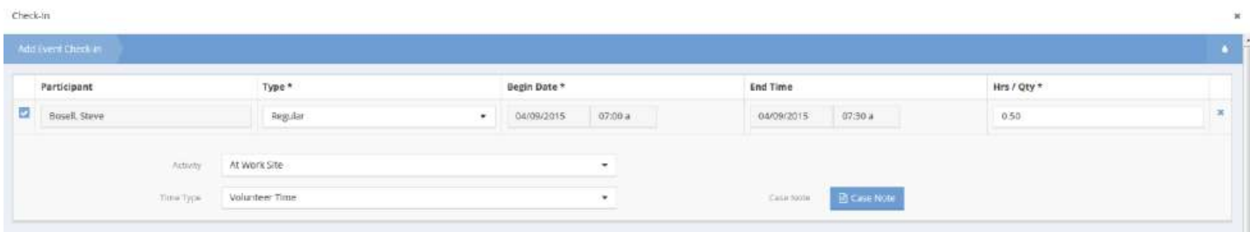


Select Check-In from the pop up menu. The Check-In form displays.

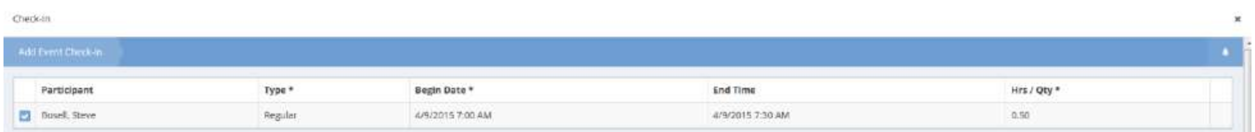
Event Check in Add



Click on the clear checkbox next to the participant name. Make any required changes and click on the Save button.



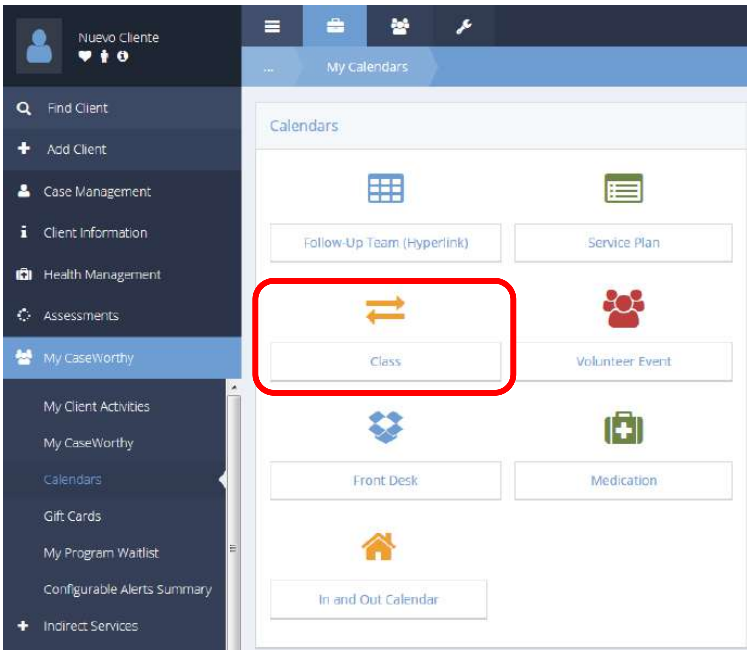
The checkbox is now blue, indicating the participant is checked in.



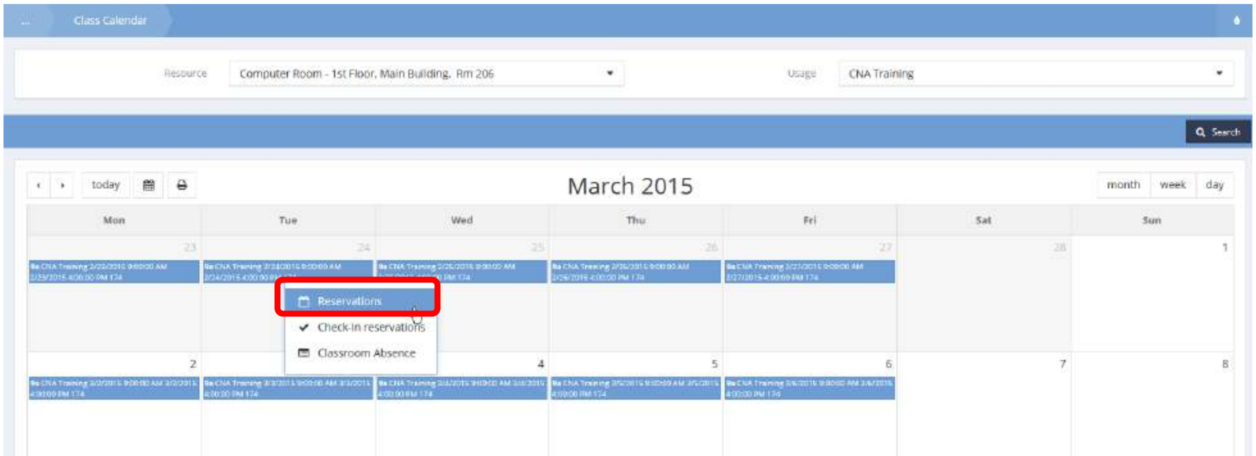
Calendar Reservations W/ Check-In

Objective: Check a client in to a class or housing slot at the same time as the reservation creation.

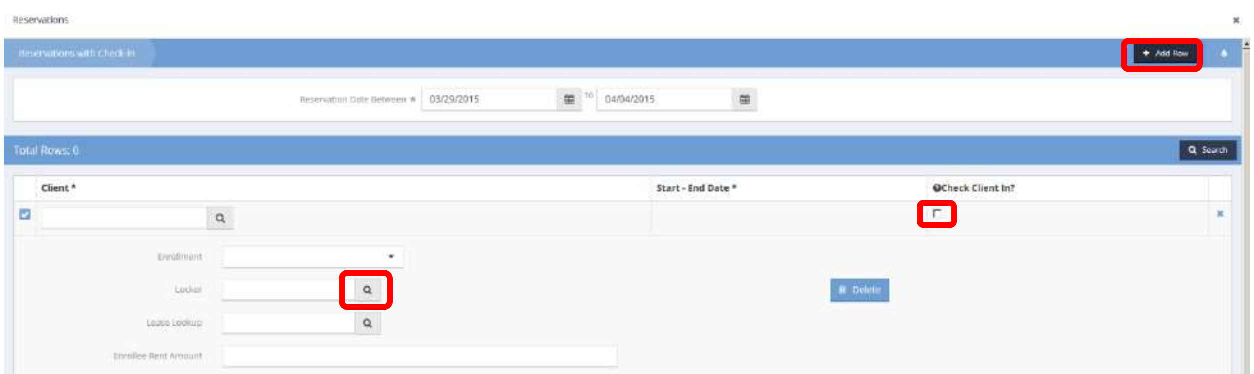
Select the Class icon from the Calendars menu.



Click on the desired event on the calendar. The popup menu appears. Select Reservations from the pop up menu.



The Reservations form displays. Click the **+ Add Row** button to add a new reservation. Enter the client name, the start date (if different from the defaulted date), the end date, and the reservation date between values. To check the client in to the class, check the check box. If a locker is associated with this class, click on the magnifying glass icon and select the desired locker.

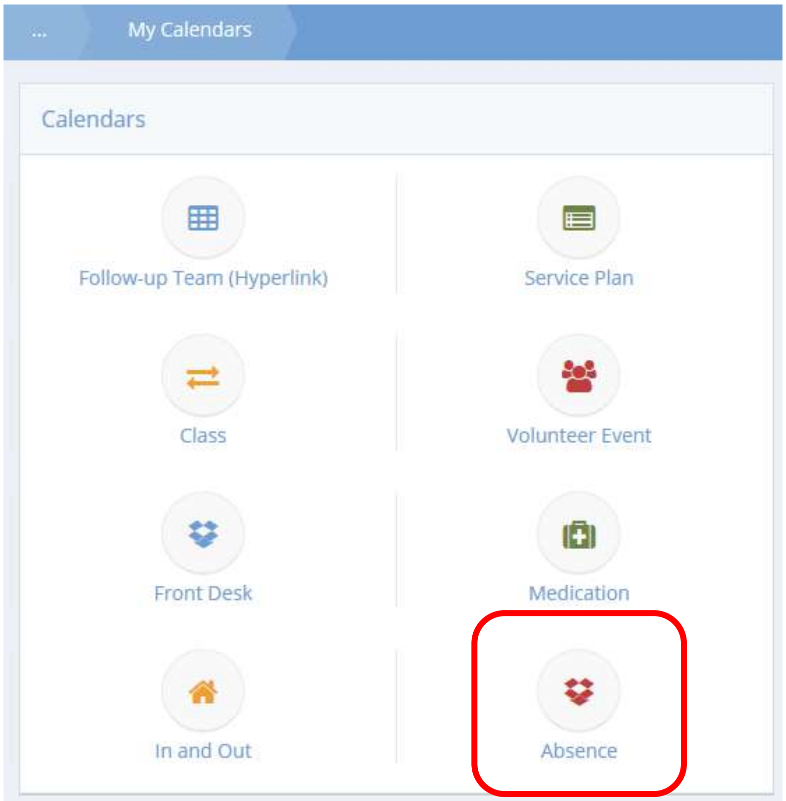


When finished, click on the **Save** button.

Absence Calendar

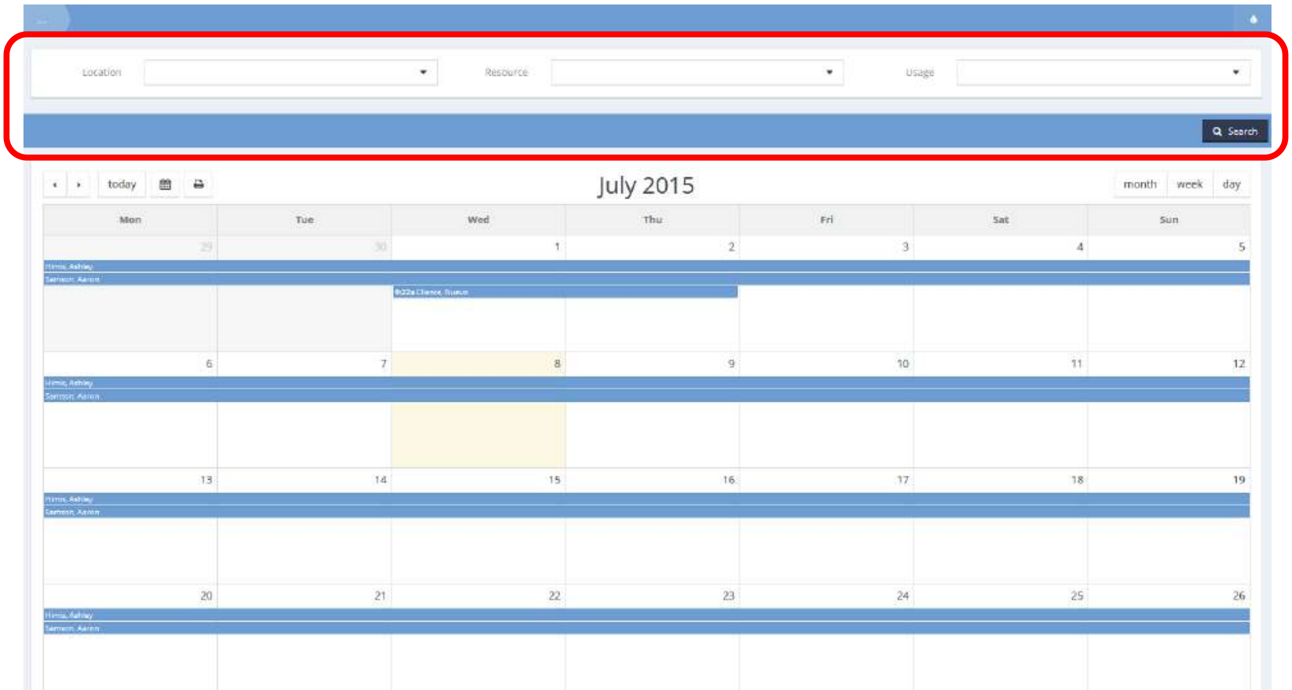
Objective: View and manage client absences in a calendar.

Navigation: Case Management>My CaseWorthy>Calendars

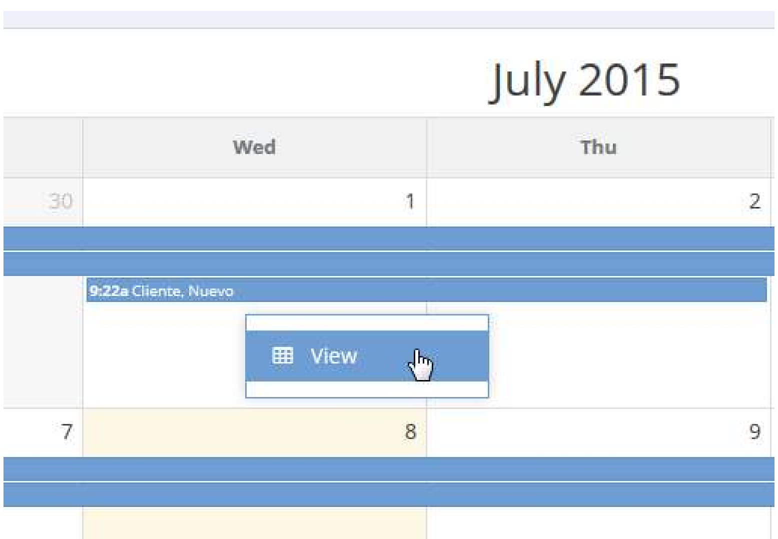


Click the icon for Absence.

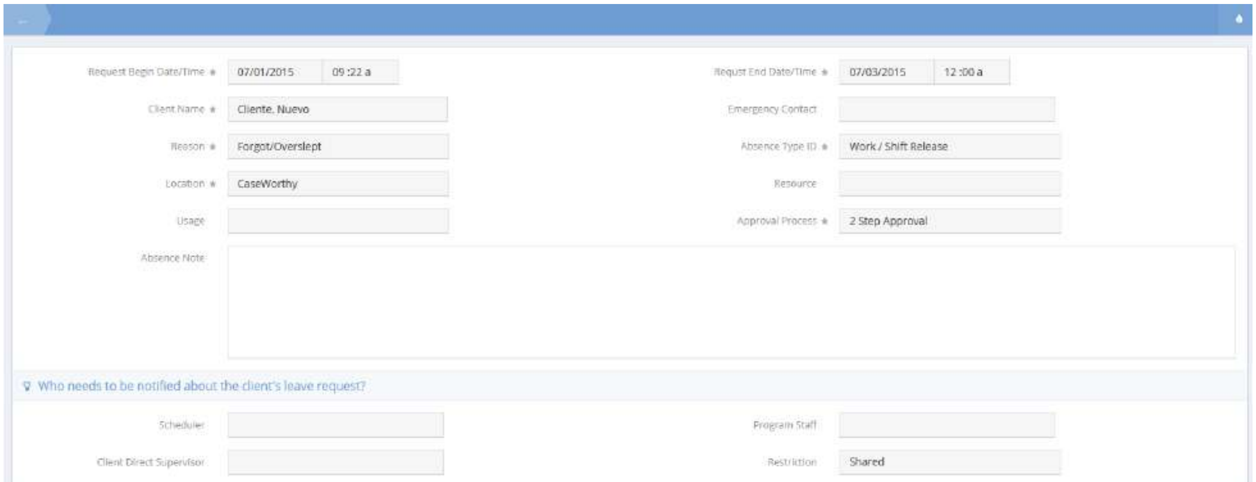
The Absence Calendar displays. Use the drop-down lists and Search button to filter the calendar.



To view details of an absence, click the entry and click View.



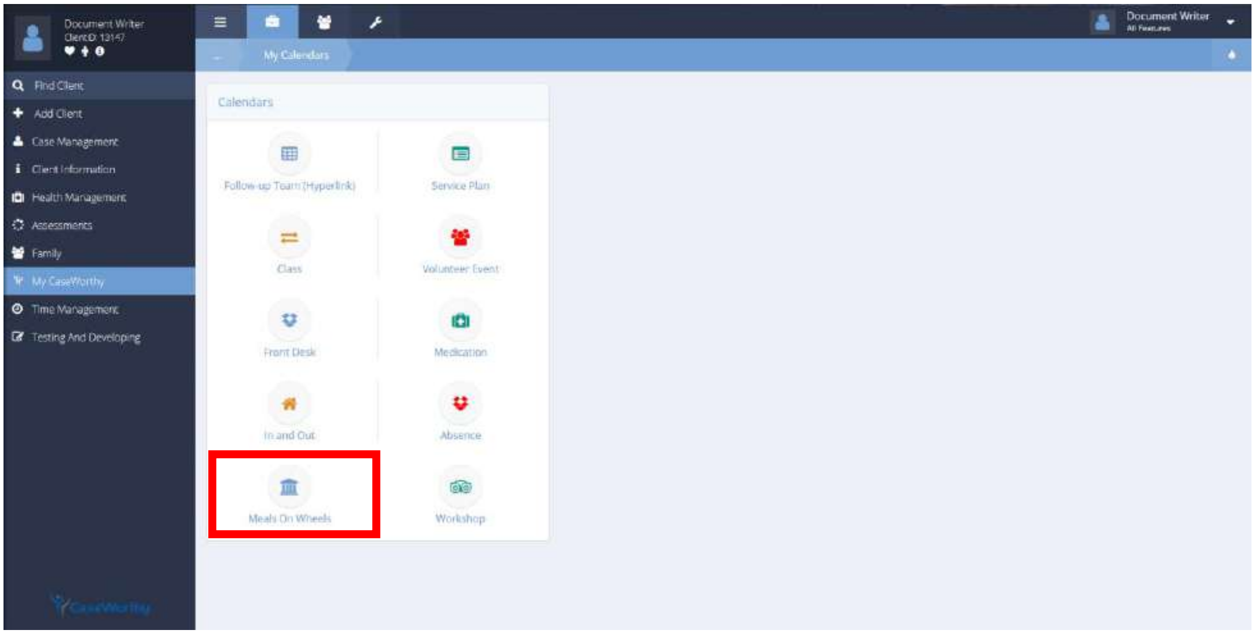
The Absence Management (Input) form displays.


Request Begin Date/Time
07/01/2015
09 :22 a
Requst End Date/Time
07/03/2015
12 :00 a
Client Name
Cliente, Nuevo
Emergency Contact
Reason
Forgot/Overslept
Absence Type ID
Work / Shift Release
Location
CaseWorthy
Resource
Usage
Approval Process
2 Step Approval
Absence Note
Who needs to be notified about the client's leave request?
Scheduler
Program Staff
Client Direct Supervisor
Restriction
Shared

Meals on Wheels

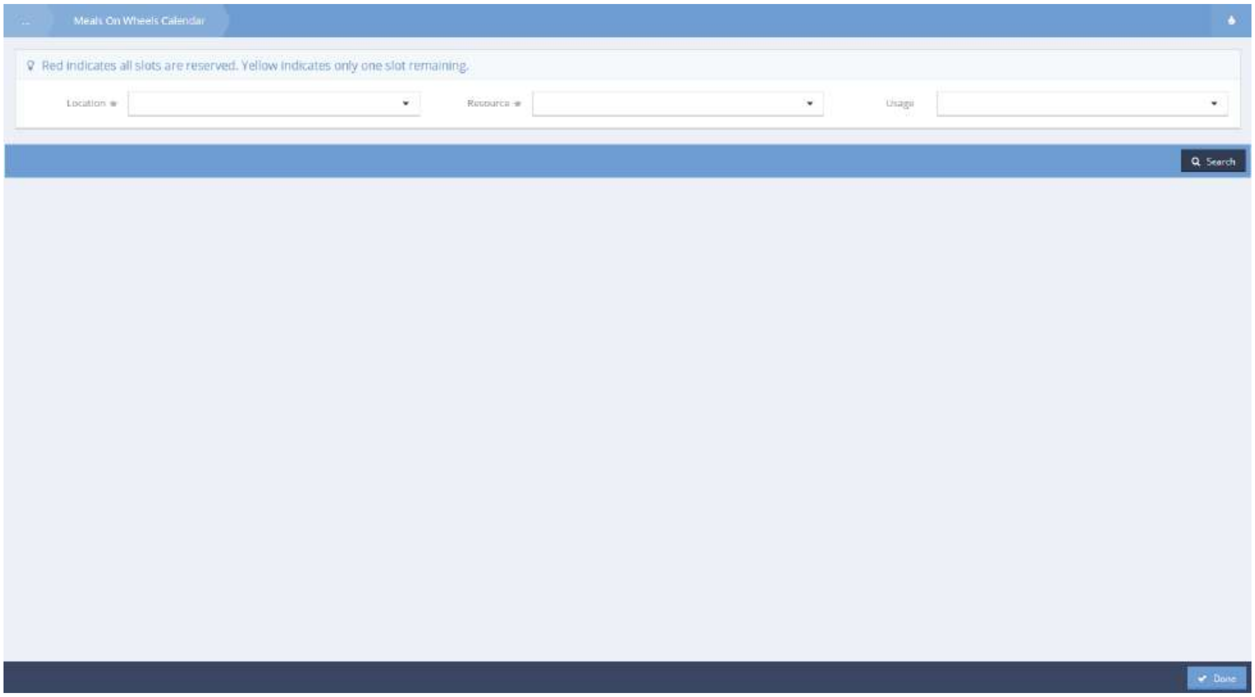
Objective: Manage Meals on Wheels

Navigation: Case Management>My CaseWorthy>Calendars

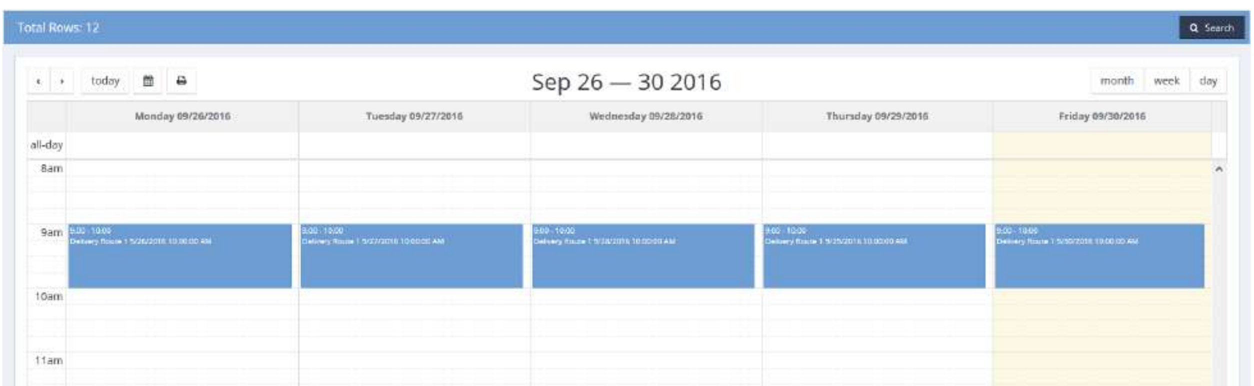


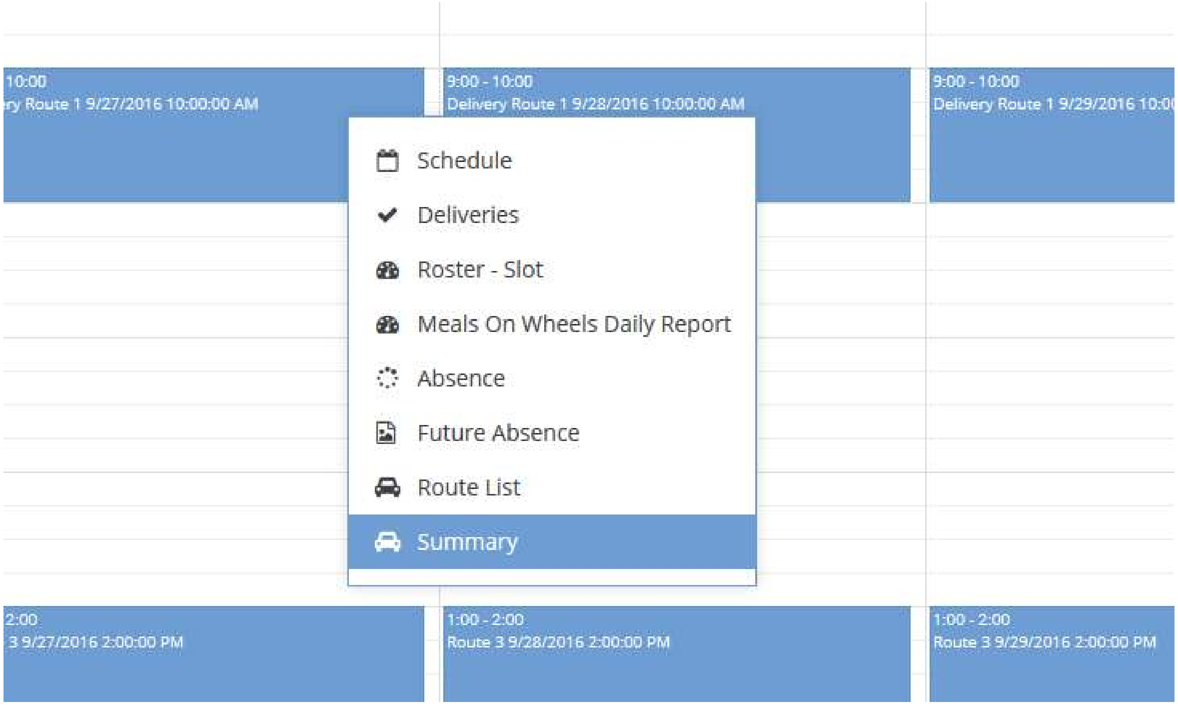
Select Meals on Wheels from the Calendars dashboard.

The Meals on Wheels Calendar form displays.



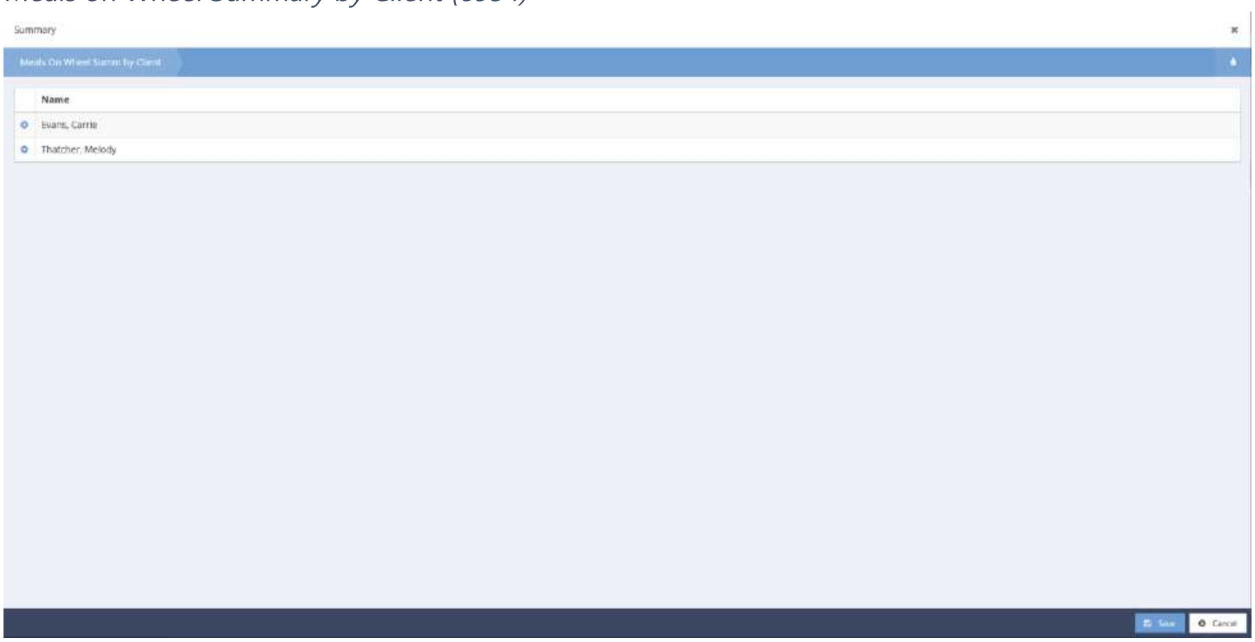
Select a Location, Resource, and/or Usage if desired to filter results and click the Search button to populate the list. Click the desired event and select Summary from the menu options.





The Meals On Wheels Summary by Client form displays in a new pop-up window.

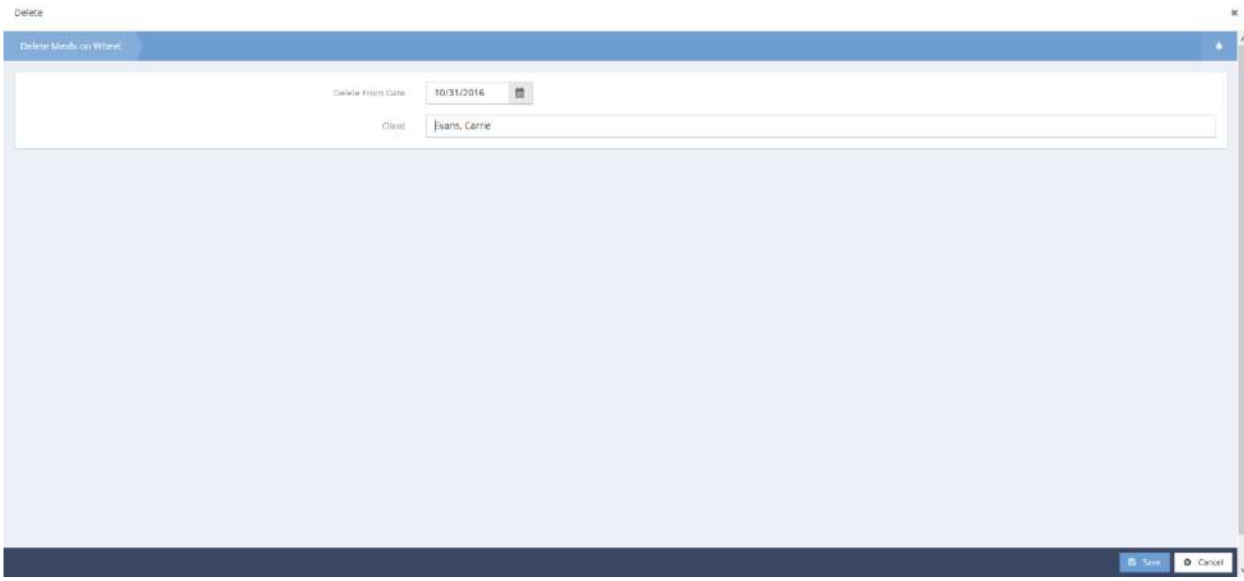
Meals on Wheel Summary by Client (8954)



A list of all reserved clients for that event (meal service) displays. To delete a client from the route, click the action gear icon associated with the desired client and select Delete from the menu options.

The Delete Meals on Wheels form displays.

Delete Meals on Wheels (8955)



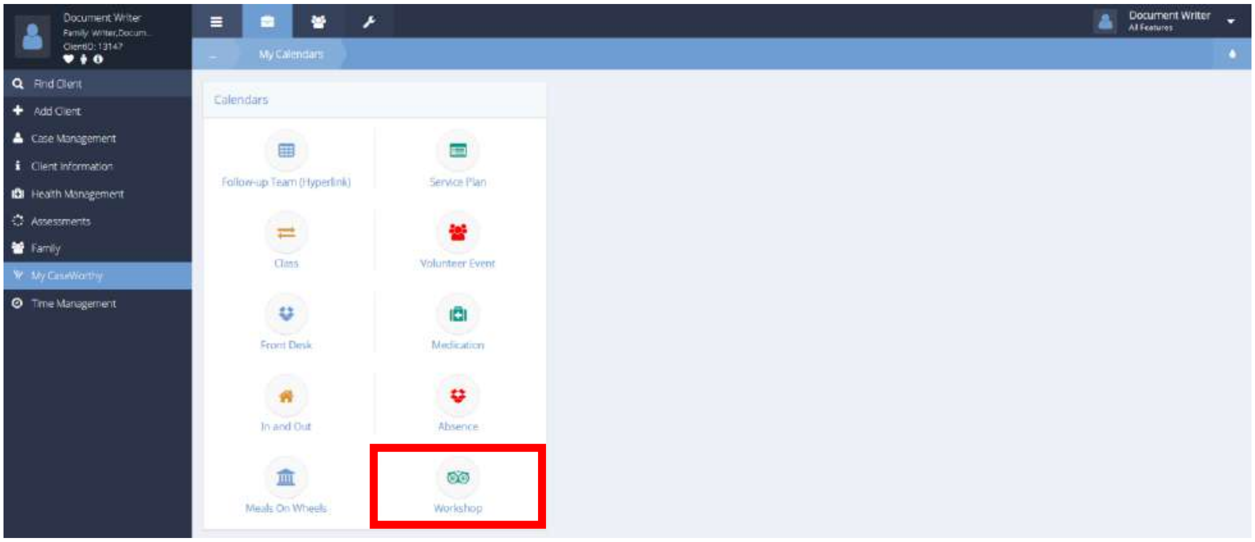
Select the appropriate deletion date, click the 

 button to save and exit.

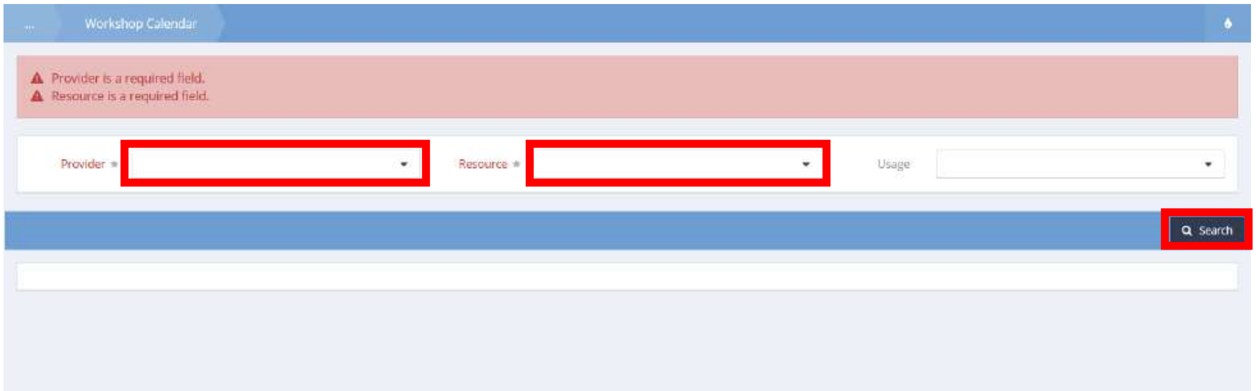
Workshop

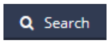
Objective: Manage workshop series including: reservations.

Navigation: Case Management>My CaseWorthy>Calendars

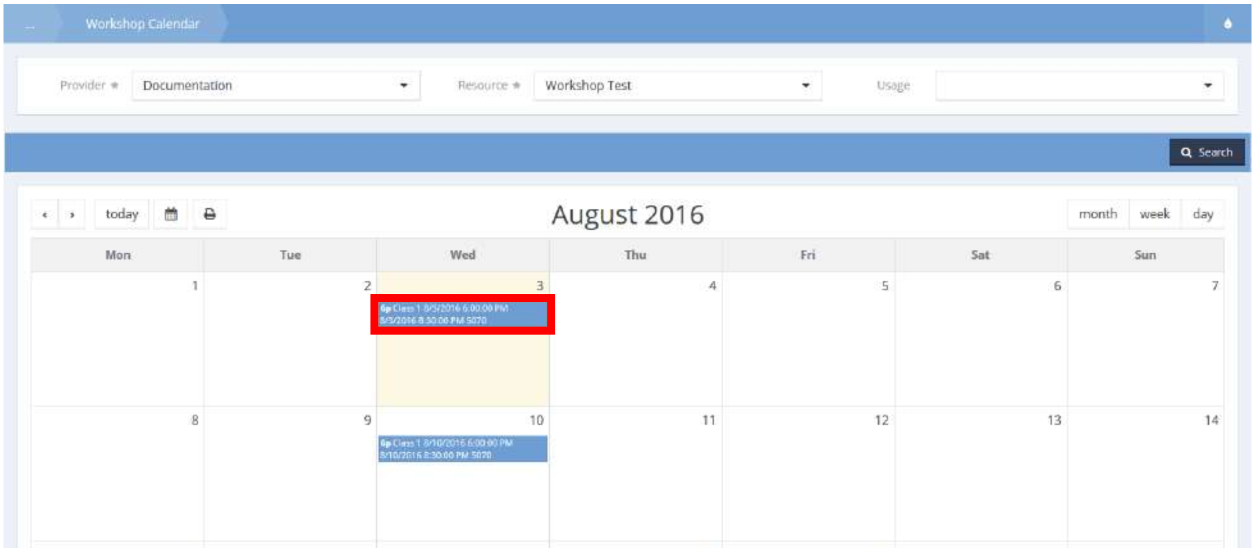


Select Workshop from the My Calendars dashboard. The Workshop Calendar form displays.

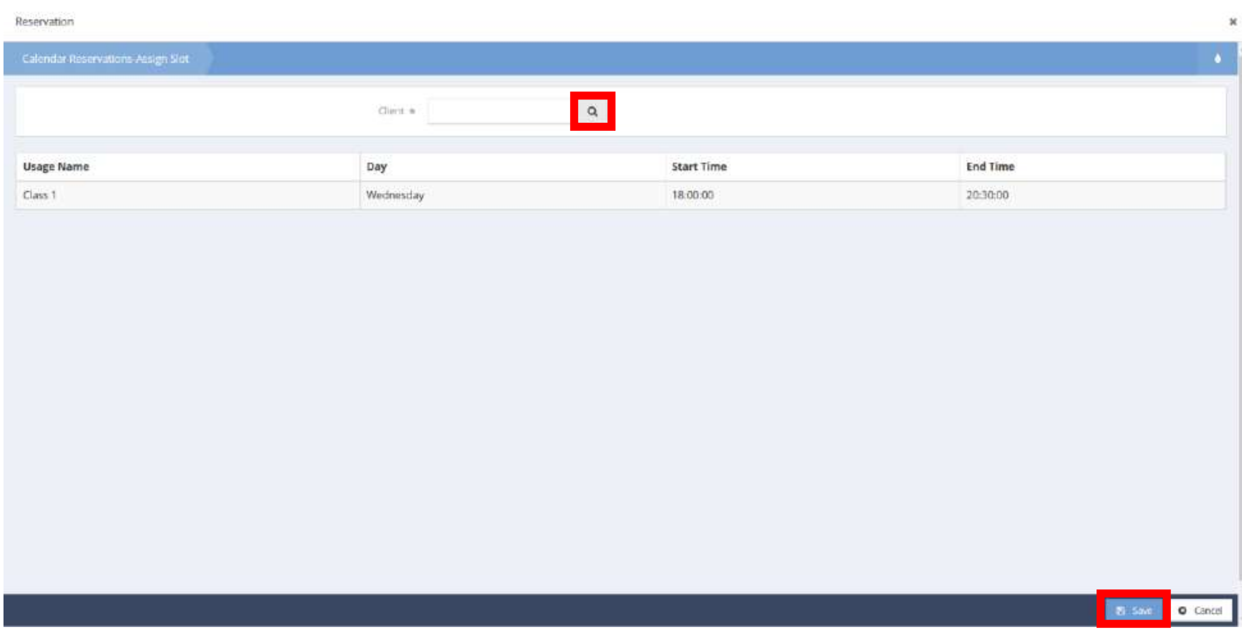


Select a Provider and Resource (and a Usage if desired). Click the  button to populate results.

The Workshop Calendar displays.



Select an event by clicking, a menu appears. Select Reservation from the menu options to make a reservation for a client. The Calendar Reservations-Assign Slot form displays in a new pop-up window.

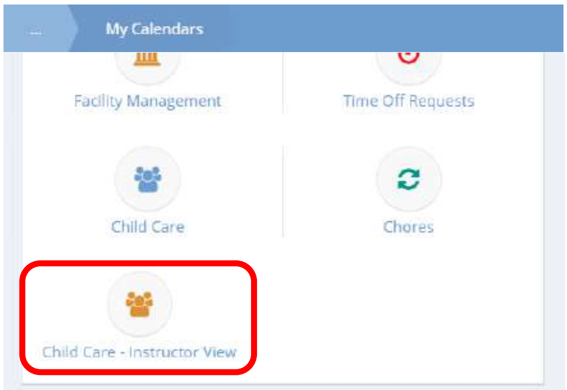


Use the magnifying glass icon to select a client to reserve. Once a client has been selected, click the Save button to save and return to the Workshop Calendar form.

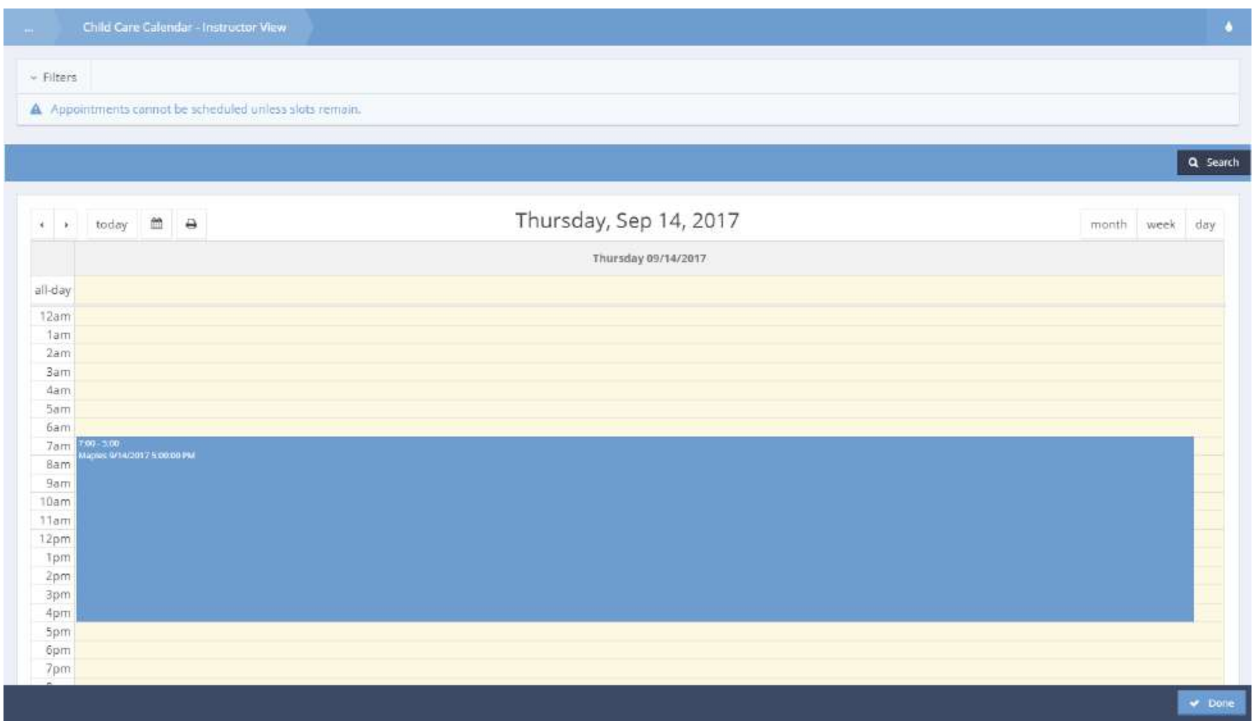
Child Care Calendar – Instructor View

Objective: Instructor view of the Child Care calendar.

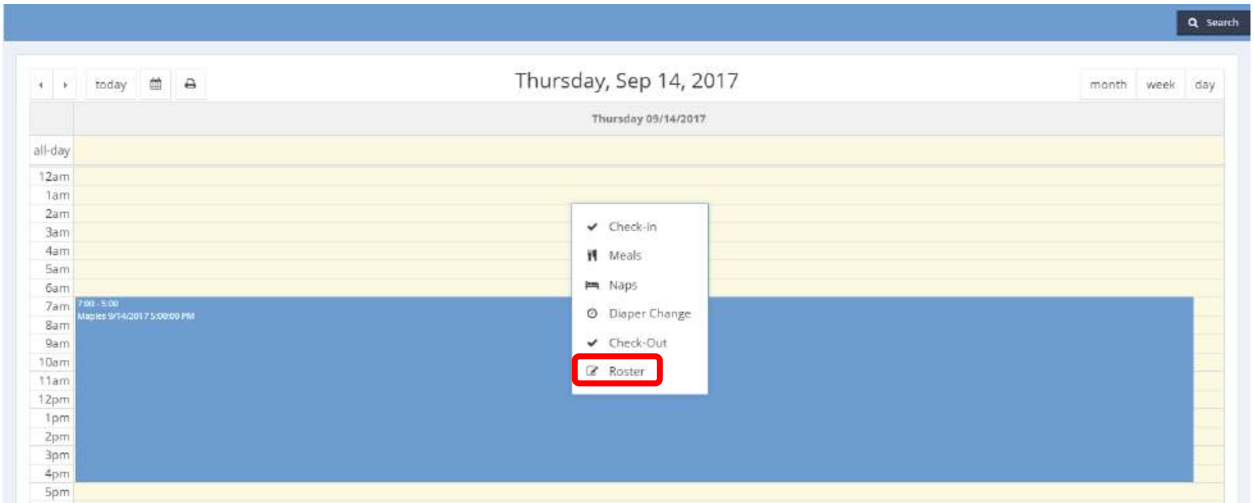
From the My Calendars dashboard, click on the icon labeled Child Care – Instructor View.



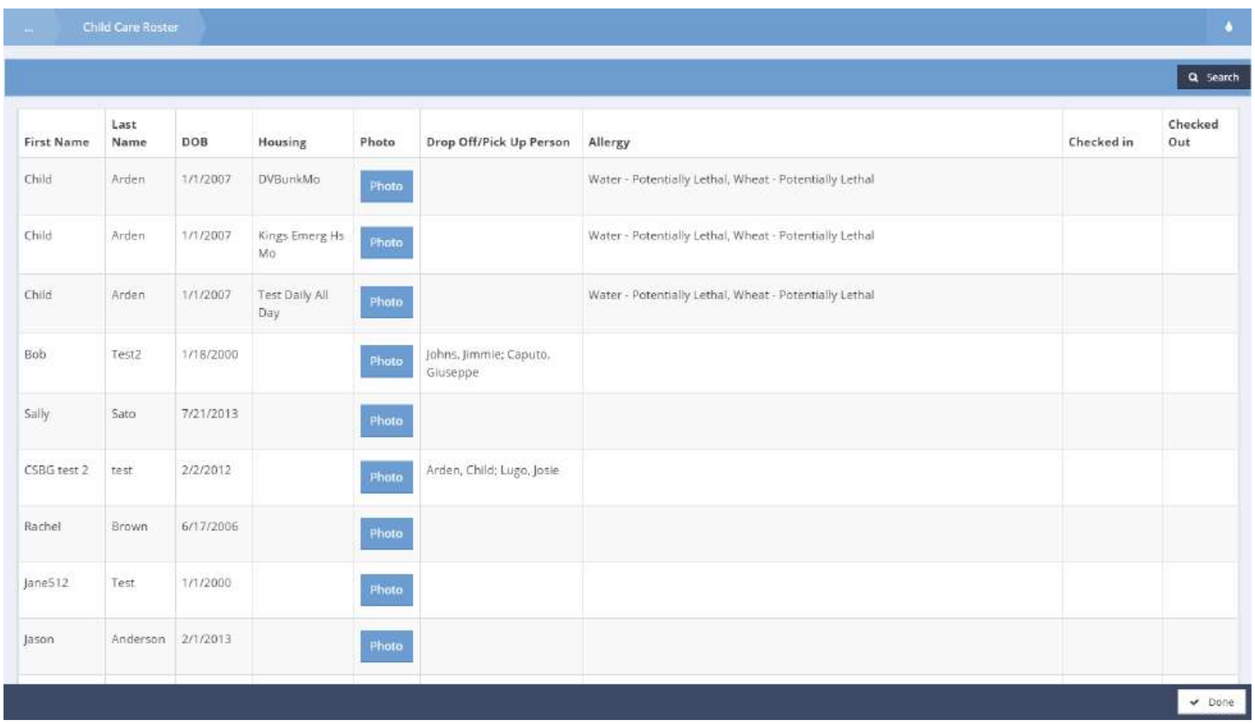
The Child Care – Instructor View Calendar appears.



Click on a class/event to view a pop-up menu.



Many of the same options found on the Child Care calendar appear on this menu. Click on Roster. The Child Care Roster displays.


Child Care Roster

Search

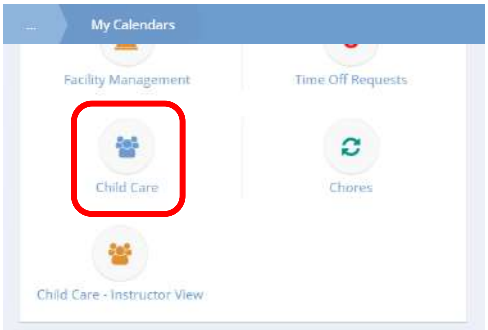
First Name	Last Name	DOB	Housing	Photo	Drop Off/Pick Up Person	Allergy	Checked in	Checked Out
Child	Arden	1/1/2007	DVBunkMo	Photo		Water - Potentially Lethal, Wheat - Potentially Lethal		
Child	Arden	1/1/2007	Kings Emerg Hs Mo	Photo		Water - Potentially Lethal, Wheat - Potentially Lethal		
Child	Arden	1/1/2007	Test Daily All Day	Photo		Water - Potentially Lethal, Wheat - Potentially Lethal		
Bob	Test2	1/18/2000		Photo	Johns, Jimmie; Caputo, Giuseppe			
Sally	Sato	7/21/2013		Photo				
CSBG test 2	test	2/2/2012		Photo	Arden, Child; Lugo, Josie			
Rachel	Brown	6/17/2006		Photo				
Jane512	Test	1/1/2000		Photo				
Jason	Anderson	2/1/2013		Photo				

Done

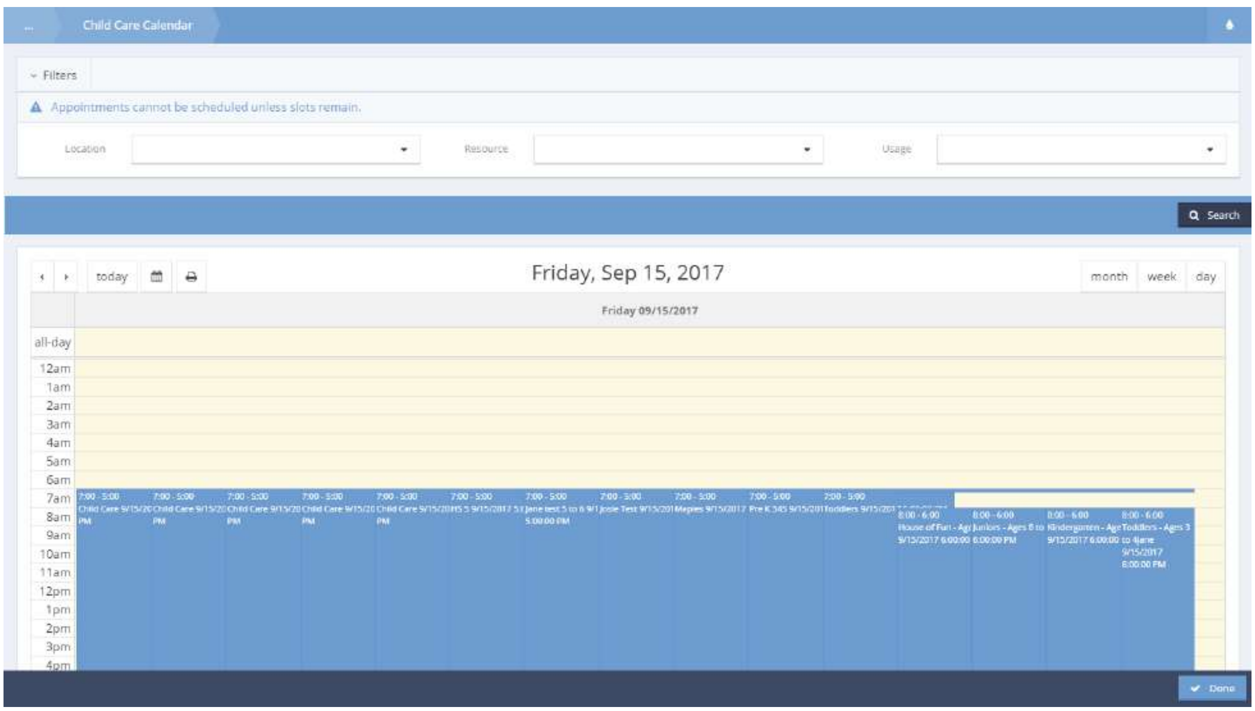
Child Care Roster allows teachers of each classroom to see a list of all children in the class, important information about each child, and when they were checked in and out for that day. Click on the Photo button to view a picture of the child. Click the Done button to close the form.

Child Care Check-In

Objective: Check each child into their child care class each day.

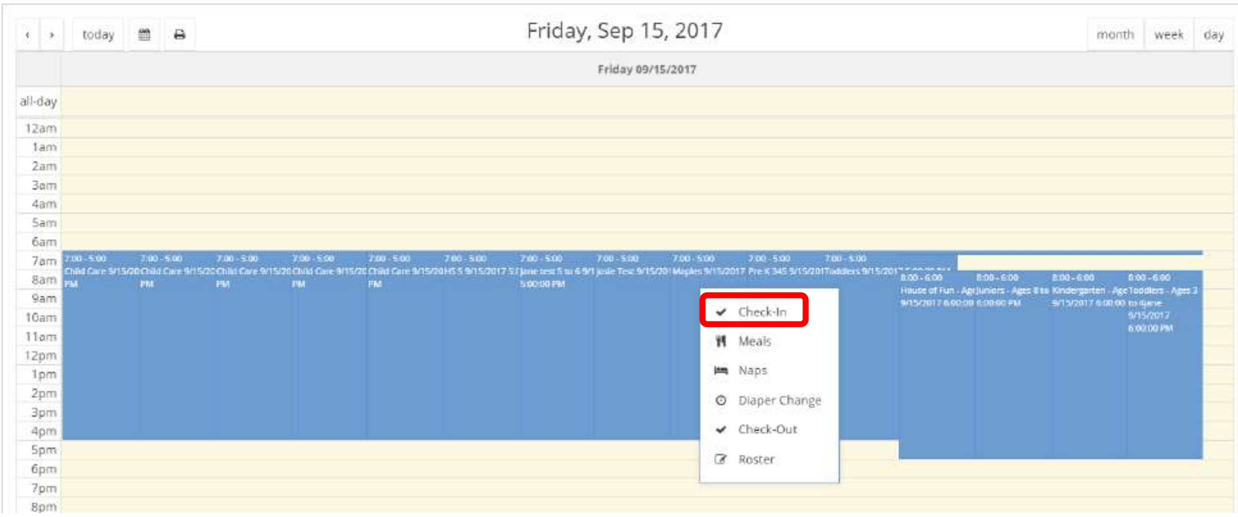


From the My Calendars dashboard, click on the icon labeled Child Care to view the Child Care calendar. The Child Care Calendar form appears.

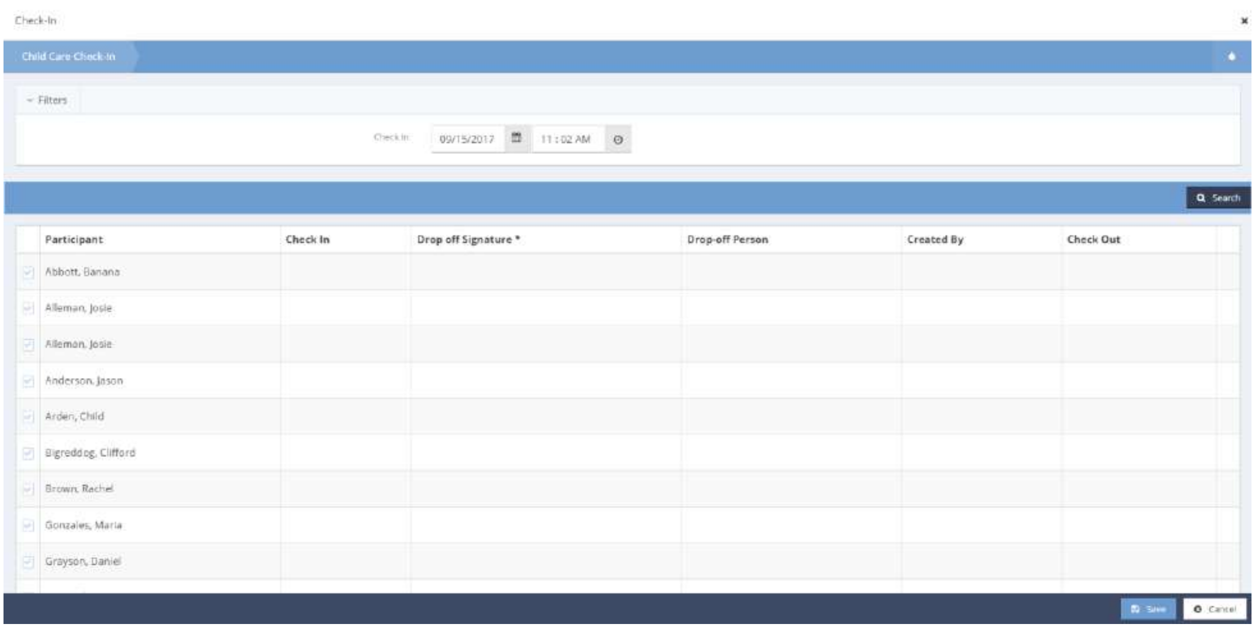


Click on a block of time designated for child care that has spaces reserved.

A pop-up menu appears.

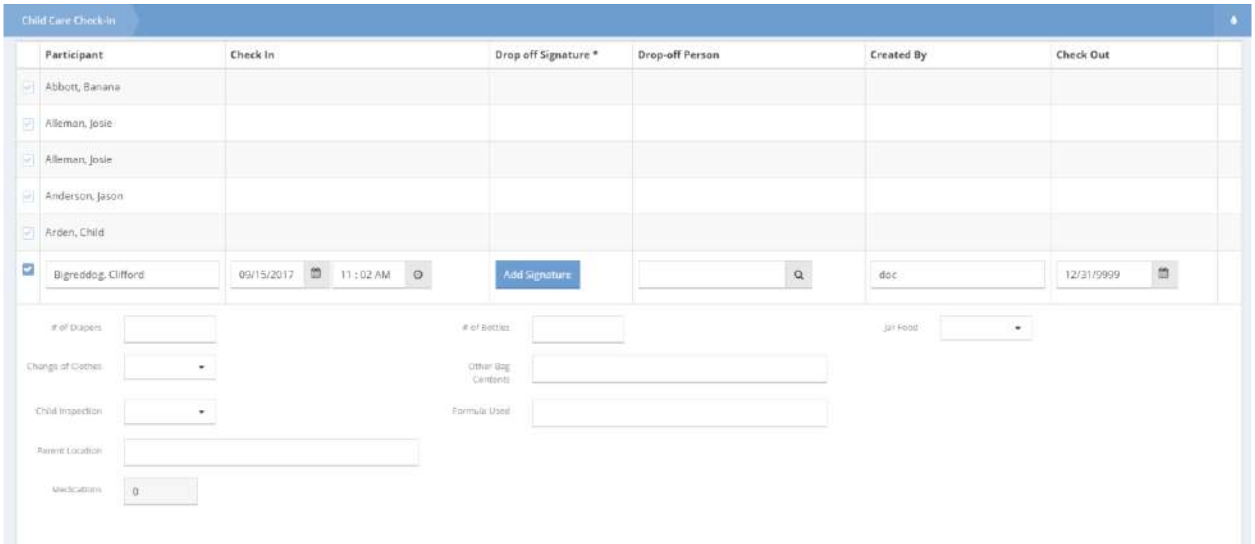


Select Check-In from the menu. The Check-In form displays.



A list of all persons reserved appears. A blue  colored checkbox next to a client's name indicates that they have already been checked in. To check in a client, select the  icon next to the client's name.

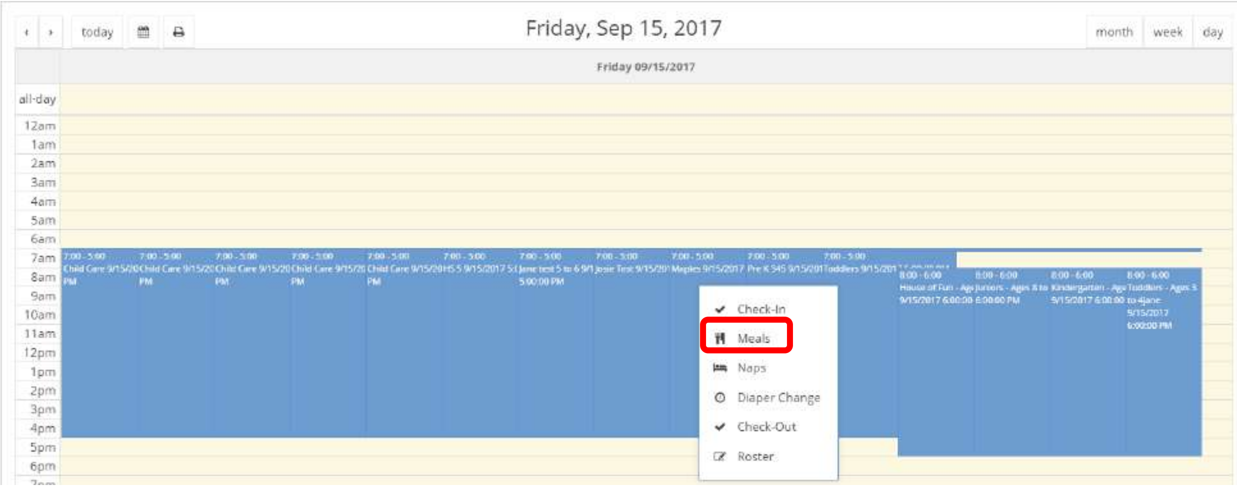
The row expands.



Click the date and time icons to adjust the check-in date and time. Click the icon to select a client to check in. The Child Care Pick-Up Select form appears.

Select a person by clicking on them. The person's name will now appear in the Drop-off Person column. Fill in any other desired information. To add a required signature, click the Add Signature button. Click the Save button to complete check-in and return to the Child Care Calendar.

Child Care Meals

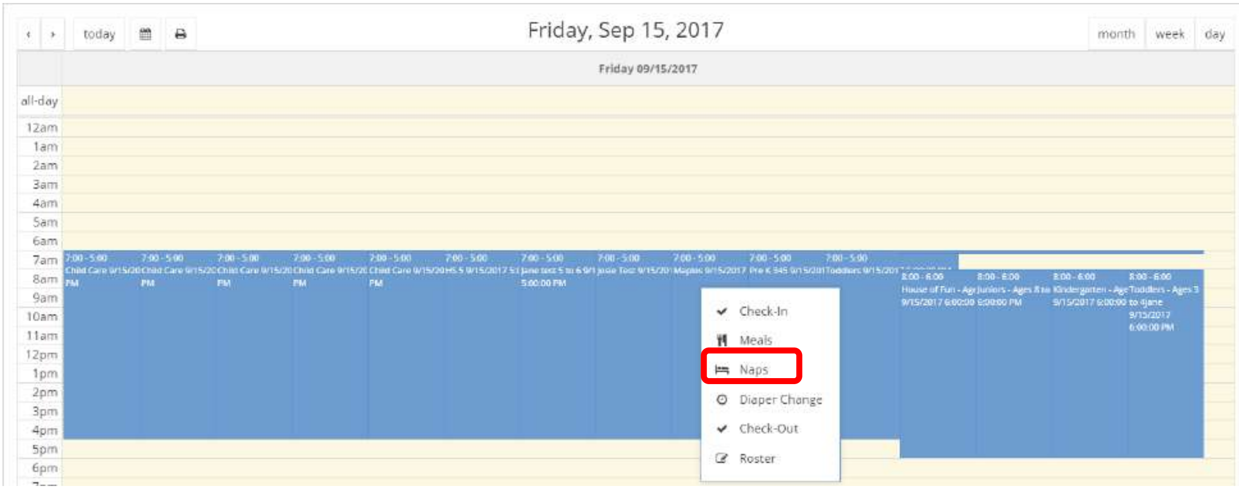


Click on Meals to record a meal service for children that are reserved and checked in to the usage. The Child Care Meals form displays.

Select a meal from the drop-down menu. Adjust the meal time by clicking the date and time icons. Click the Search button. A list of checked in clients appears with the selected meal type next to their name.

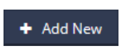
Click the icon next to the desired client. The check box turns blue and the row expands.

Fill in any desired information and click the Save button. The form closes and the userr is returned to the Child Care Calendar. Upon re-entry to the Meals form, the meal will display after the Search button is selected.



Child Care Naps

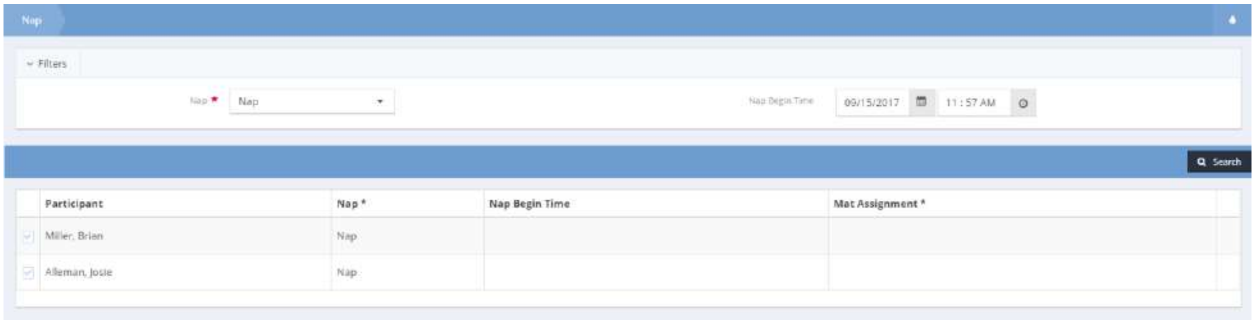
Select Naps from the menu. The Naps Summary form appears.

Click the 

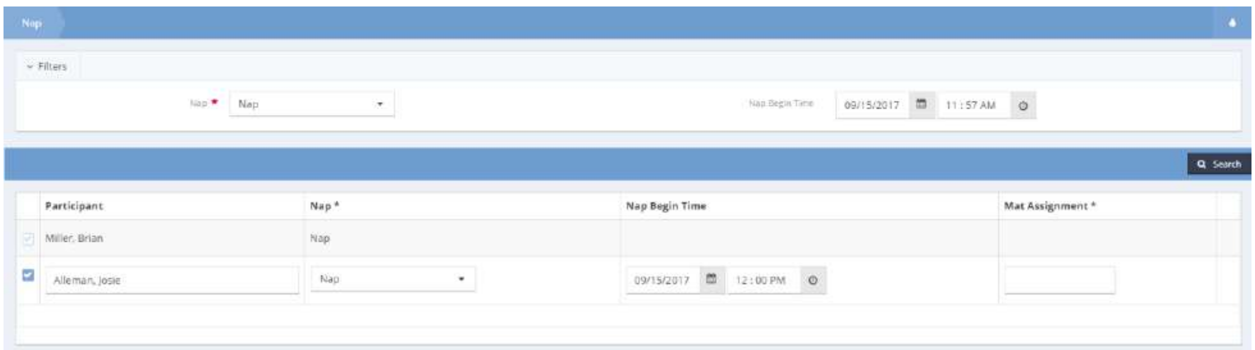
button to record a new nap. The Nap form appears.

Select Nap from the drop-down menu and adjust the date or time by clicking on the date  and time  icons.

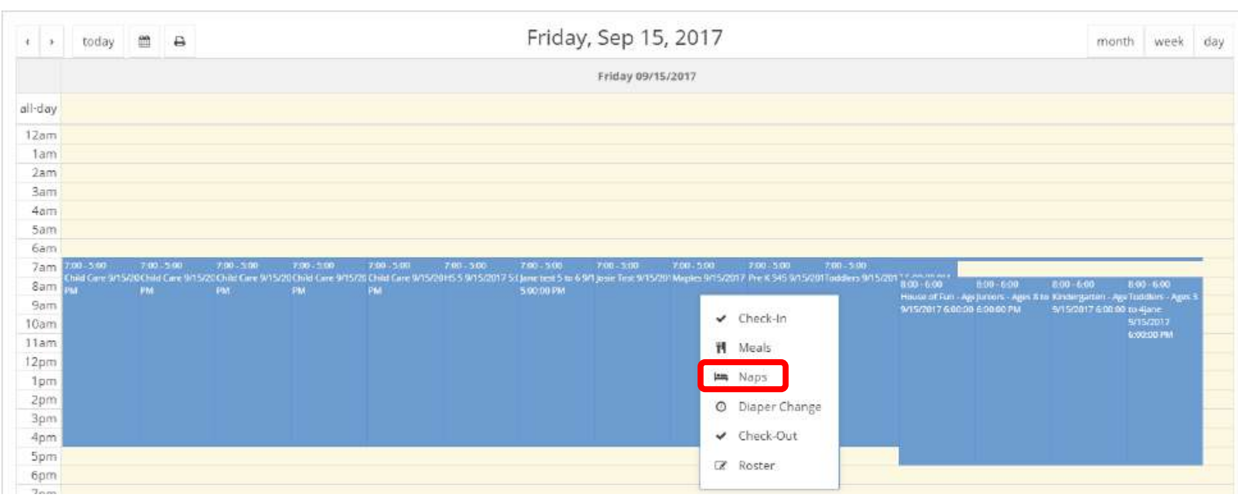
Click the Search button to view a list of all checked in clients.



Select a client by clicking the icon to record a Nap. The checkbox turns blue and the row expands.

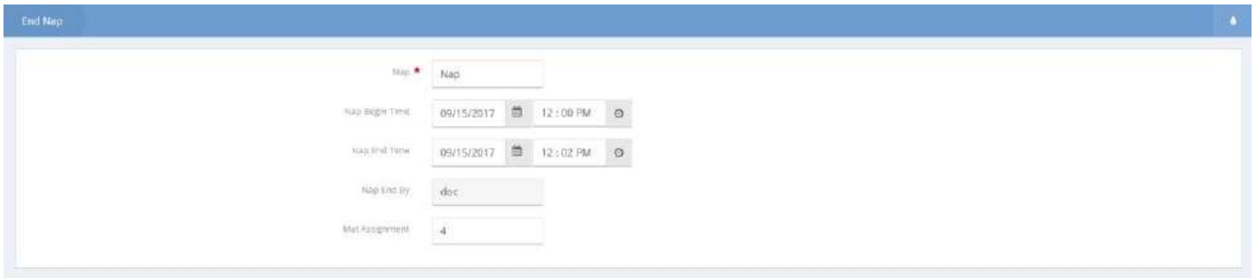


The date and time auto-populate. Fill in the Mat Assignment field by entering a value or description. Click the Save button to record the nap and return to the Child Care Calendar.



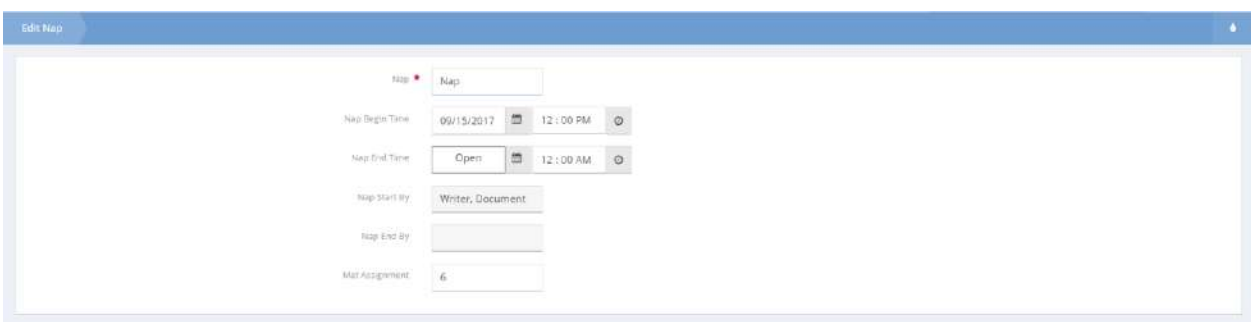
To record an end time for a nap click Naps on the pop-up menu on the Child Care Calendar. The Naps Summary form appears.

Click the action gear icon. A pop-up list appears. Click End Nap. The End Nap form appears.



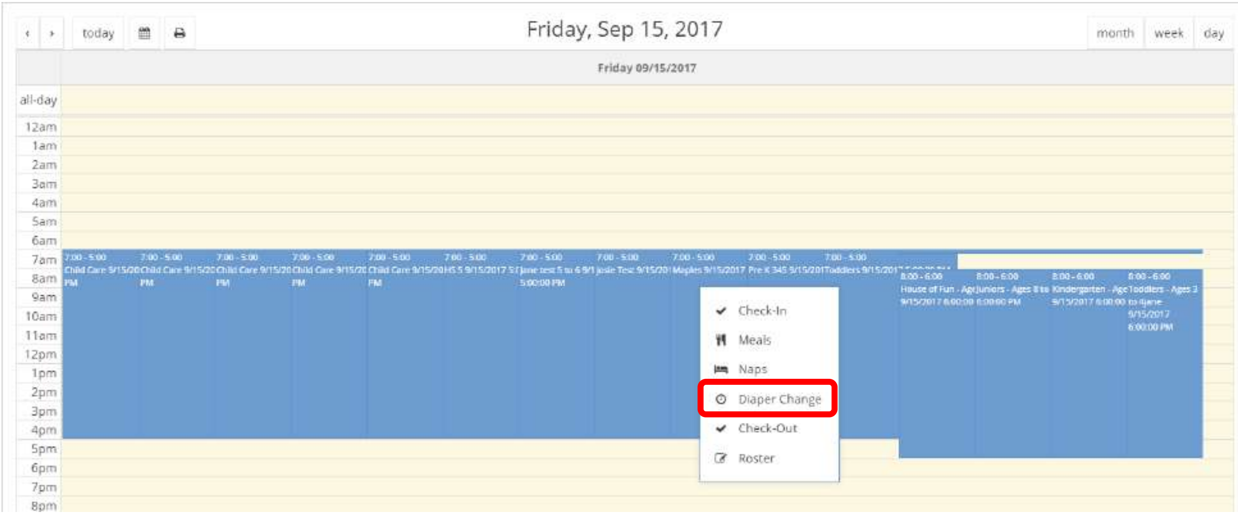
The information auto-populates. If a field is blank, enter in the information manually. Click the date and time icons to adjust the date and time. Click the Save button to save the form and return to the Nap Summary form.

To edit a nap, click Edit Nap from the pop-up menu under the Nap Summary form. The Edit Nap form appears.



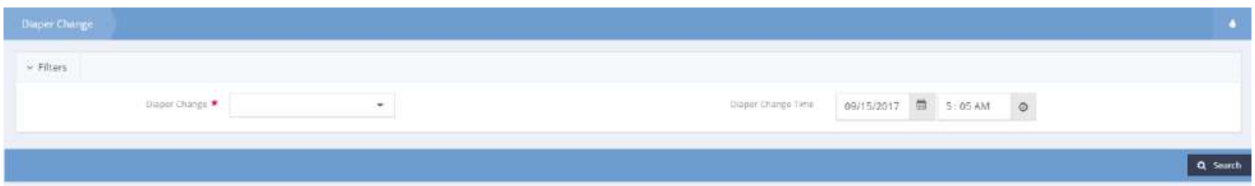
Edit the Nap field, begin time, end time, or mat assignment. Click the Save button to save the form and return to the Child Care Calendar. Click the Cancel button to cancel and return to the Child Care Calendar.

Child Care Diaper Change



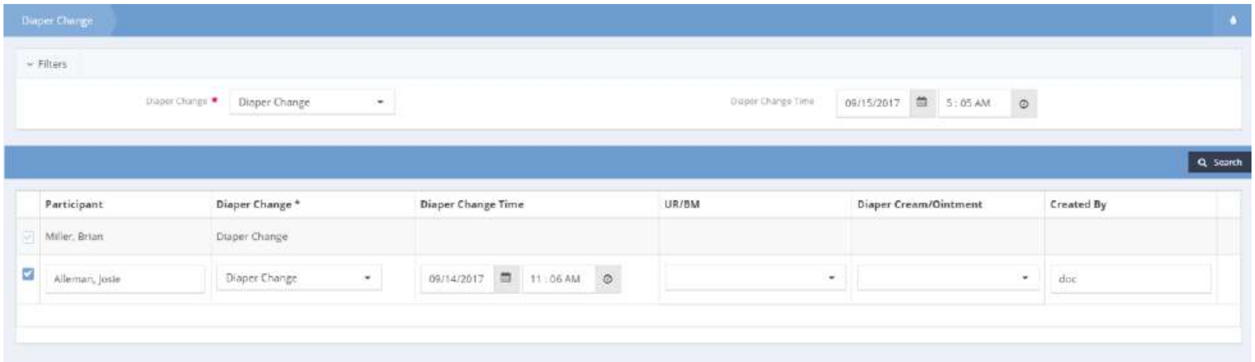
Select Diaper Change from the pop-up menu. The Diaper Change Summary Form appears.

Click the **+ Add New** button to add a diaper change. The Diaper Change form appears.



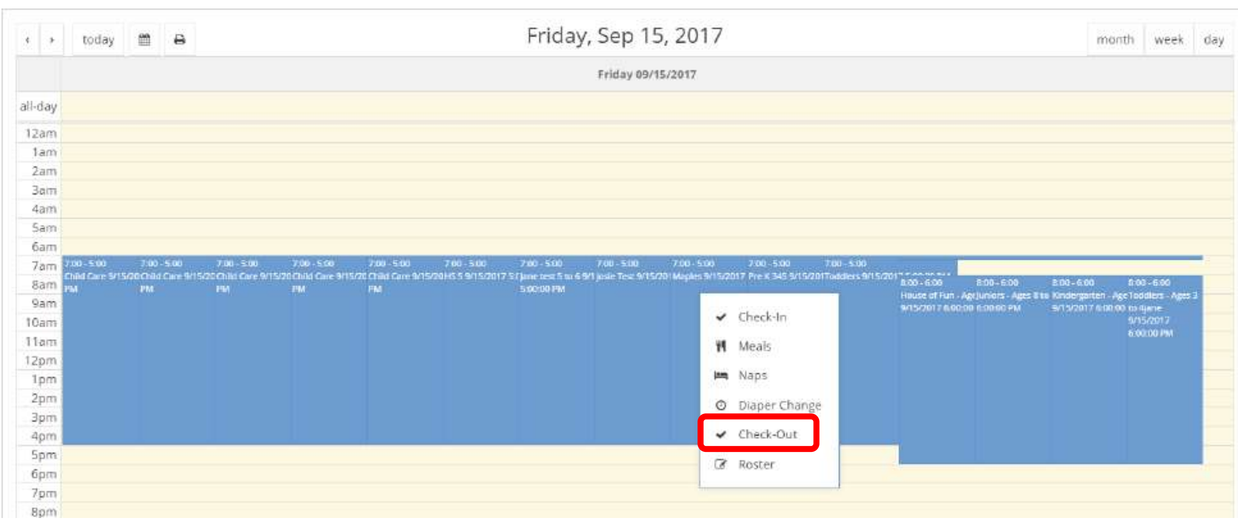
Select Diaper Change from the drop-down menu and click the **Search** button. A list of checked in clients appears. Select a client by clicking the ☑ icon to record a diaper change.

The checkbox turns blue and the row expands.



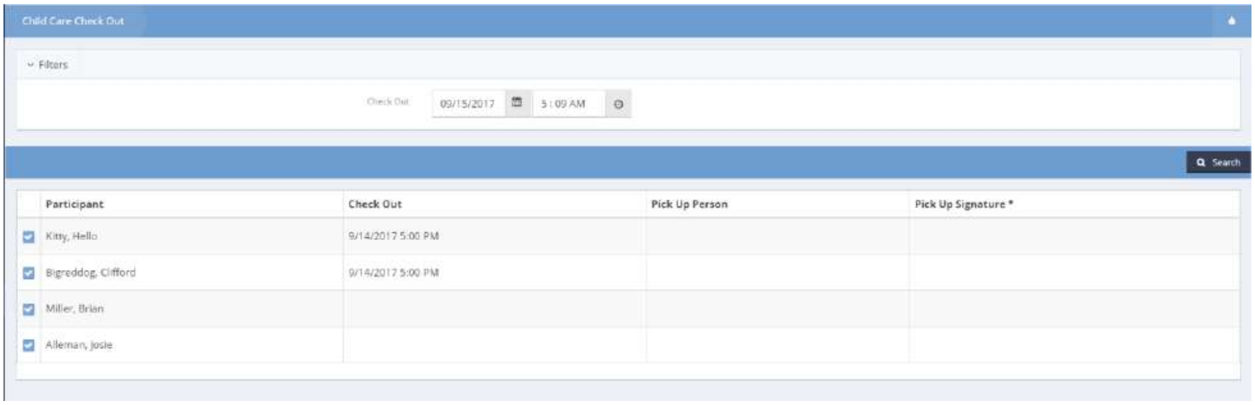
Enter information by using the drop-down menus. Click the Save button to record the diaper change and return to the Child Care Calendar.

Child Care Check-Out

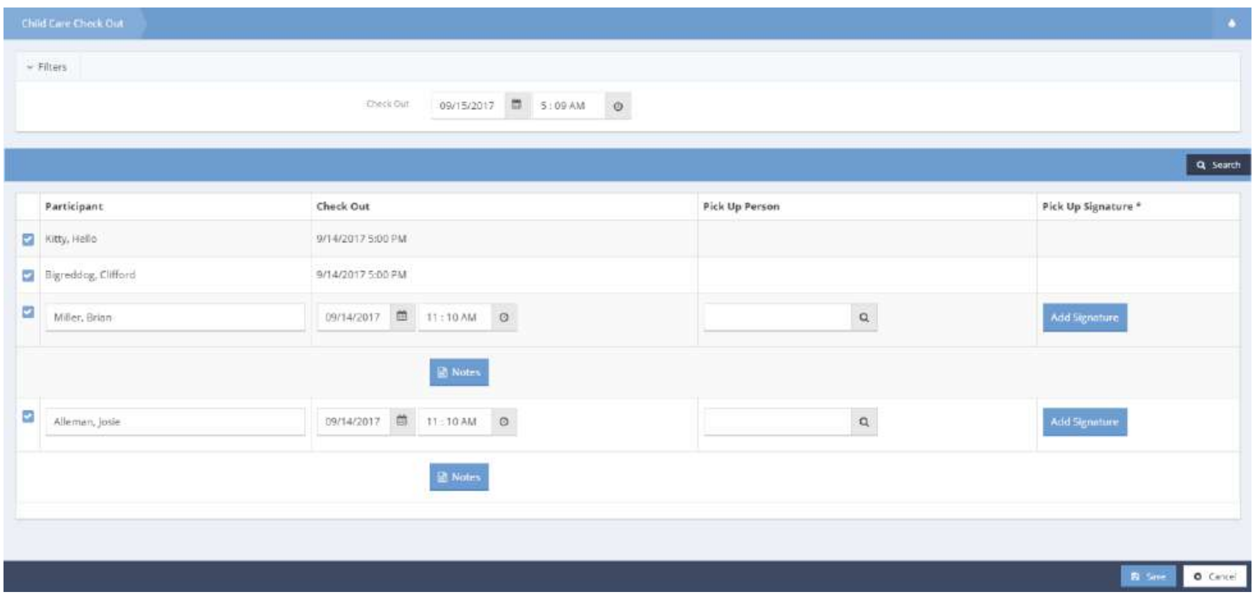


Select Check-Out from the menu.

The Check-Out form displays.



Select the icon next to the client's name to check out a client. The row expands.



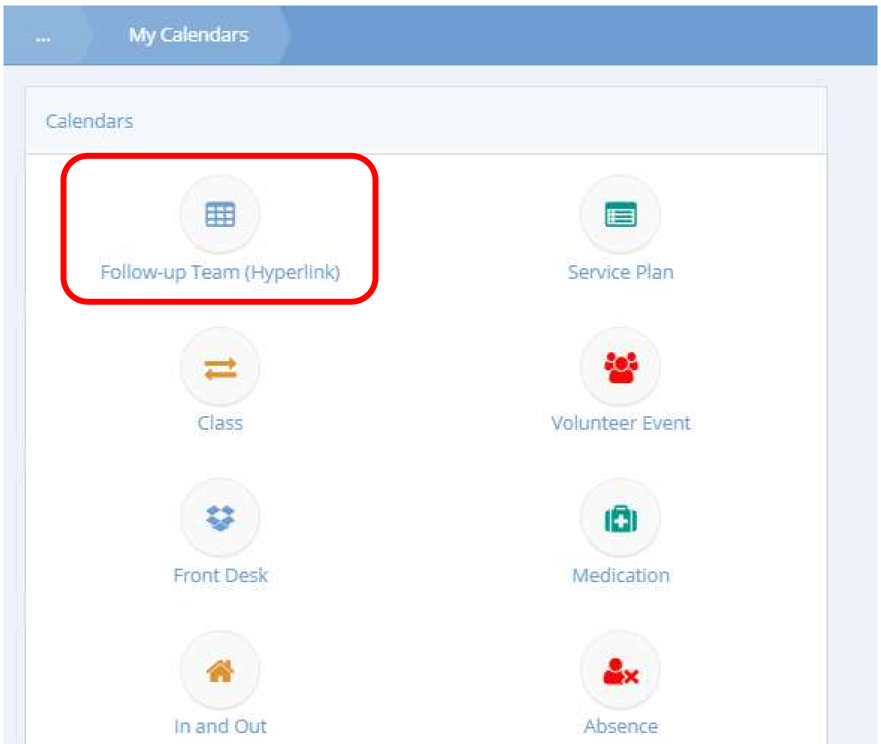
Adjust date and time by clicking the date and time icons. Add a check out signature by clicking the Add Signature button. Look up a check out person by clicking the icon. To add a case note, click the Notes button. Click the Save button to finish check out and return to the Child Care Calendar.

Feeding Instructions Followup

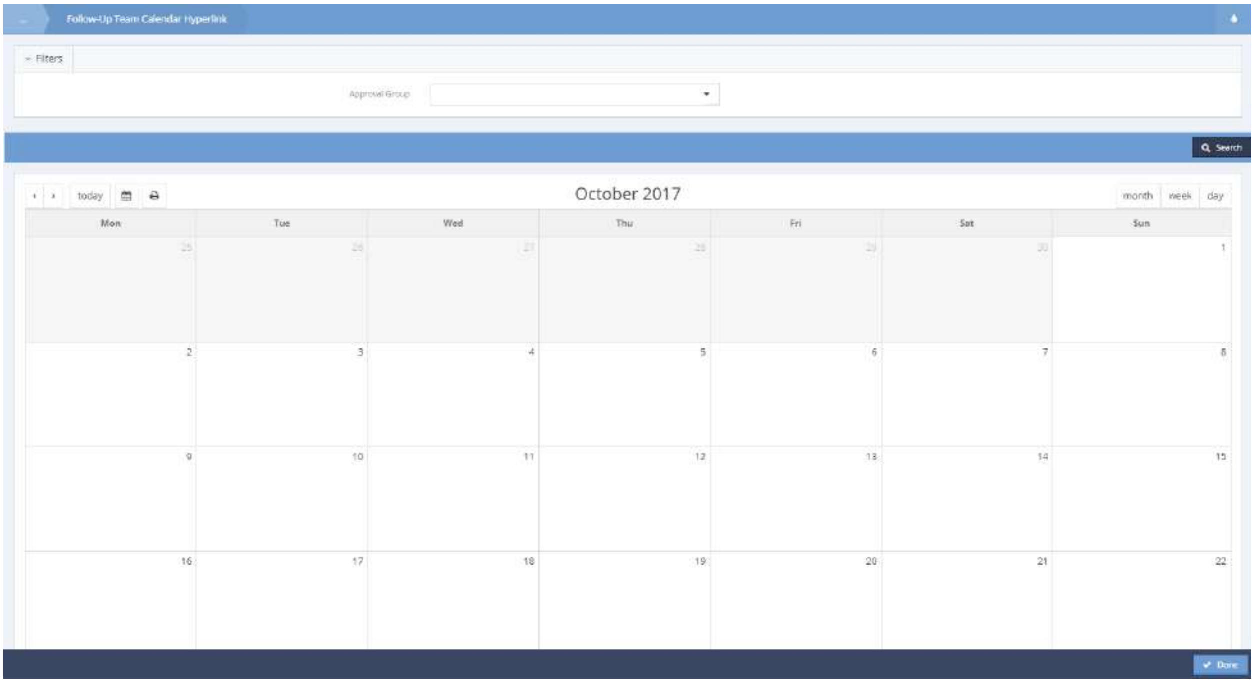
Objective: This form is the follow-up to remind teachers to do another feeding instructions assessment with a parent.

Note: ***In order to view a follow up reminder on this calendar, a follow up appointment must be set up in advance. To set a follow up, navigate to the Feeding Instructions form on the Child Care dashboard, and click the button labeled Schedule Followup at the bottom of the form.***

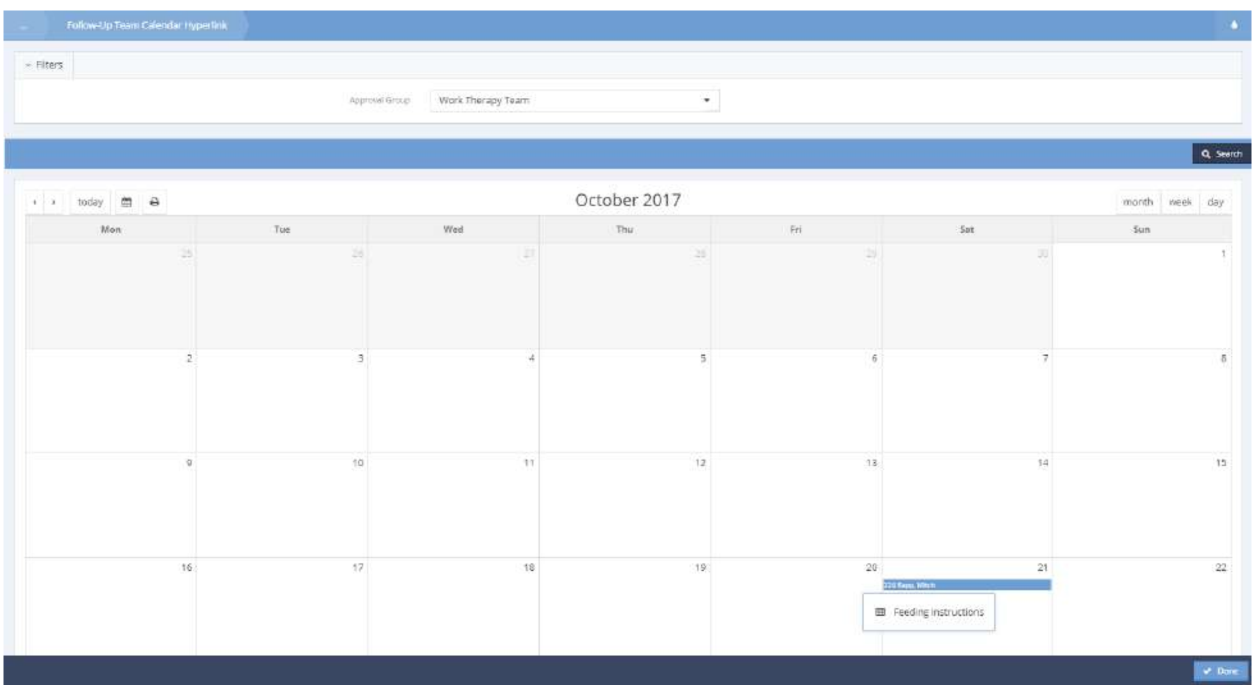
From the Calendars dashboard, click on the icon labeled Follow-up Team (Hyperlink).



The Follow Up Team Calendar Hyperlink form displays.

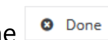


A follow up appointment has already been scheduled for October 21st. To view the follow up, use the drop-down menu at the top of the page to select the appropriate Approval Group. Appointments are now visible. Click on the appointment. A pop-up menu appears.



Click on Feeding Instructions. The Feeding Instructions Followup form displays.

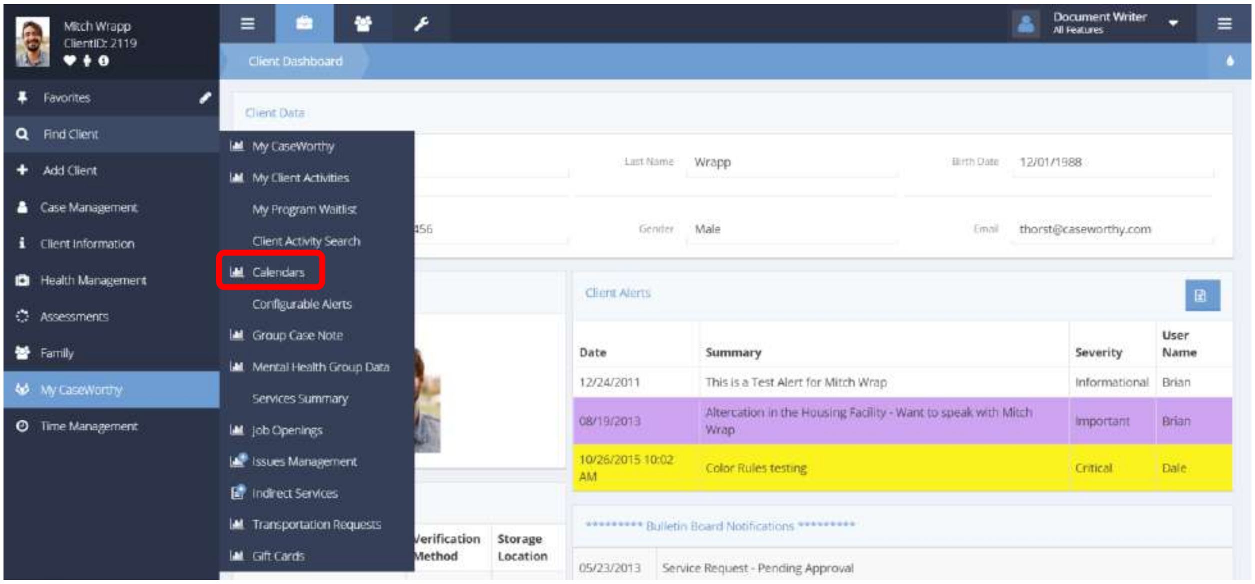
Click on the action gear  icon. A pop-up menu displays.

To make changes to the follow up or change the follow up status, click on Edit. To begin a new feeding Instructions assessment, click on Feeding Instructions Assessment. Click the  button to return to the calendar.

Facility Management Calendar

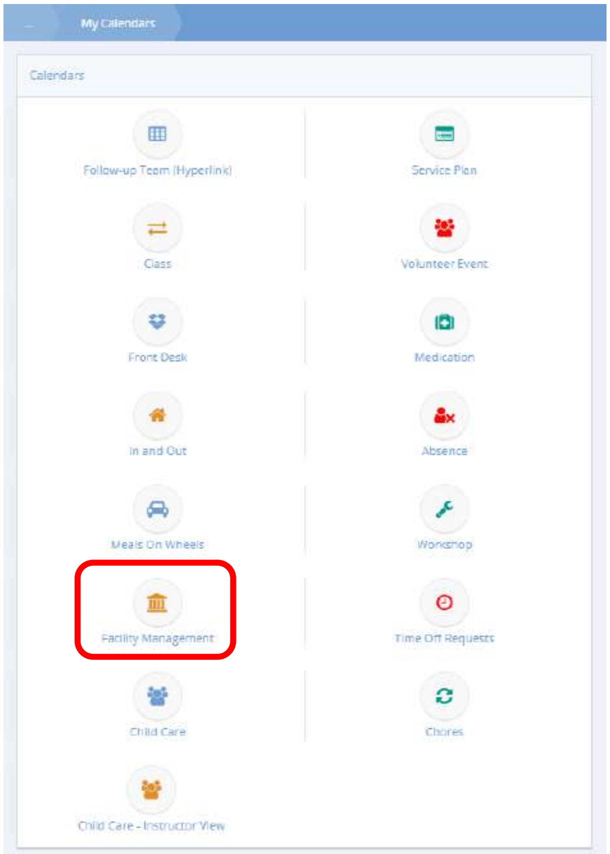
Objective: Schedule time to reserve a facility.

Navigation: Case Management>My CaseWorthy>Calendars>Facility Management Calendar



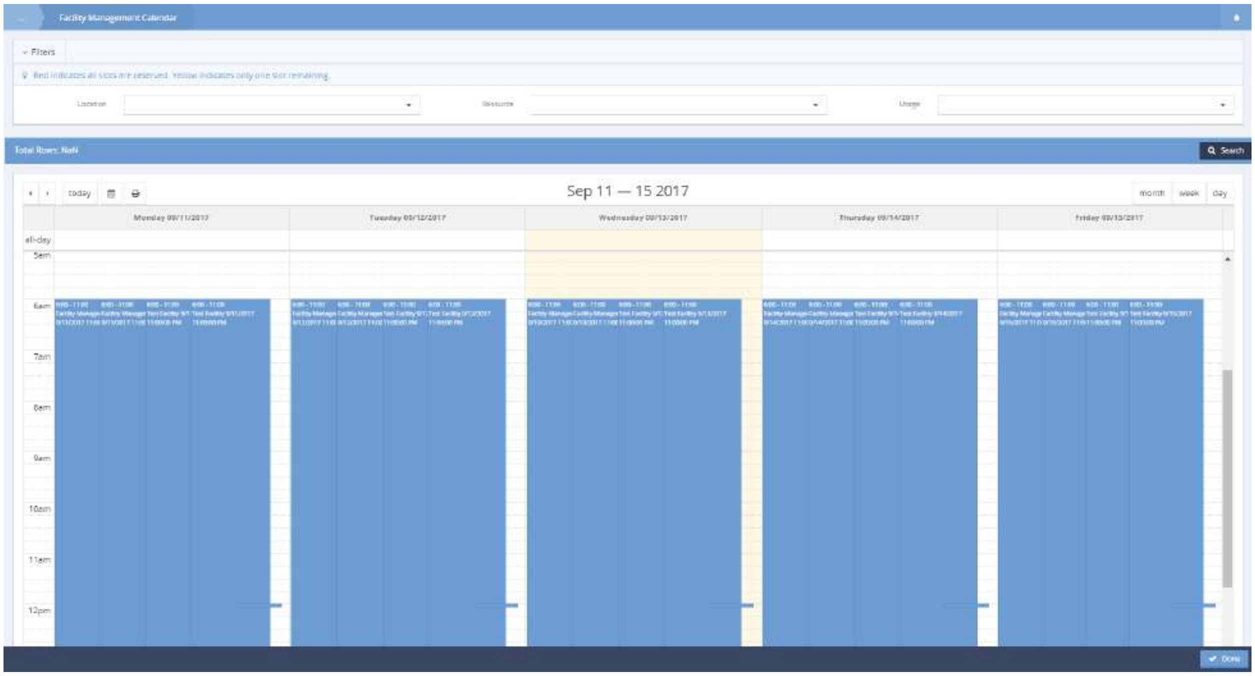
Under the Case Management tab, select Calendars.

The Calendars Dashboard displays.

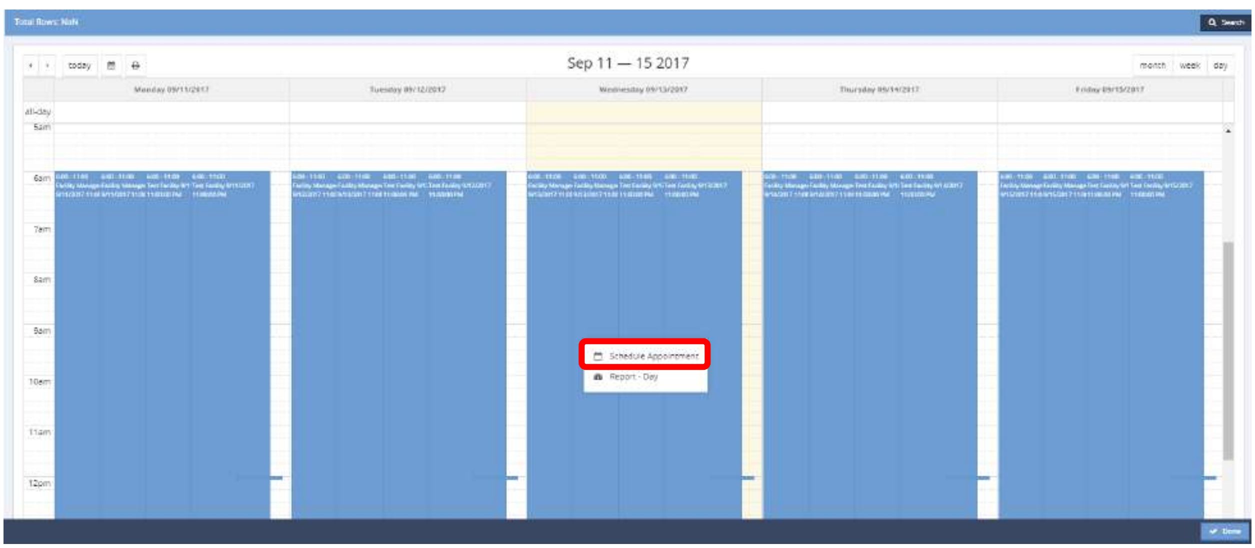


Click the Facility Management icon.

The Facility Management Calendar displays.

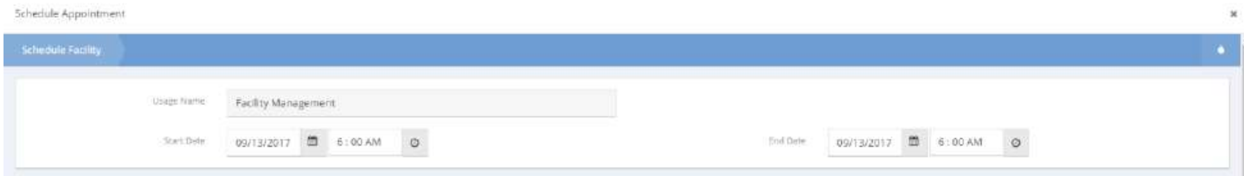


To schedule an appointment click on an event. A pop-up menu appears.



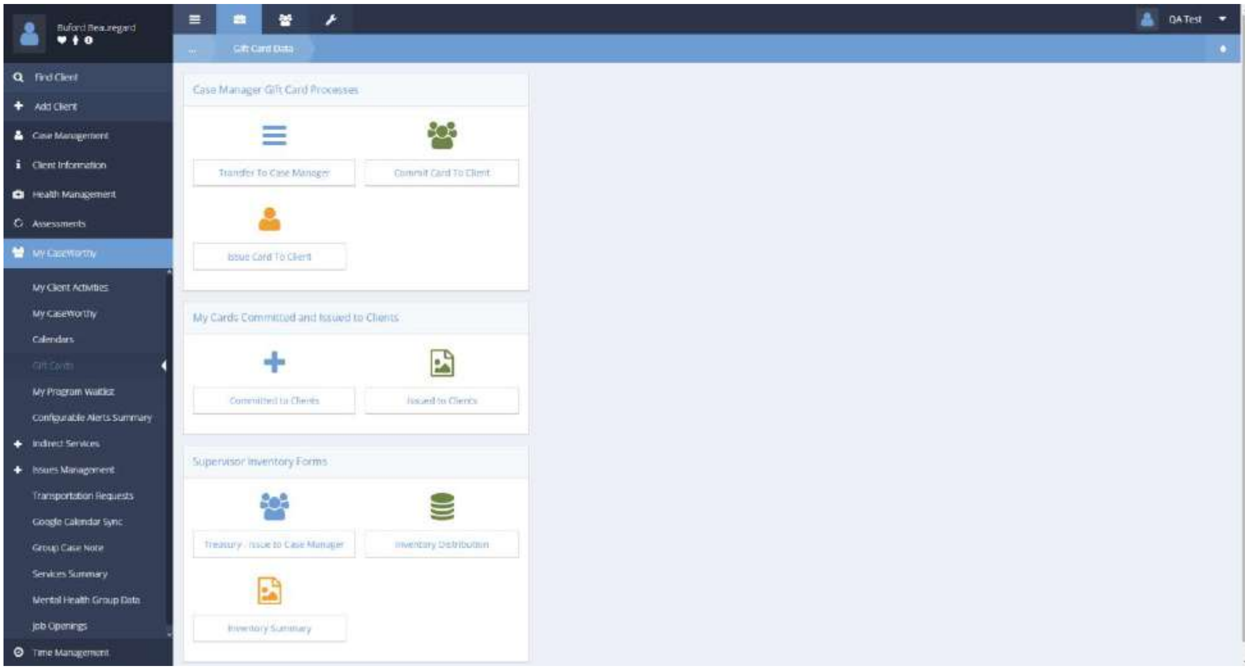
Select Schedule Appointment.

The Schedule Appointment form appears.



Adjust the Start and End dates and times by clicking the date and time icons. Click the Save button to save the appointment and return to the Facility Management Calendar.

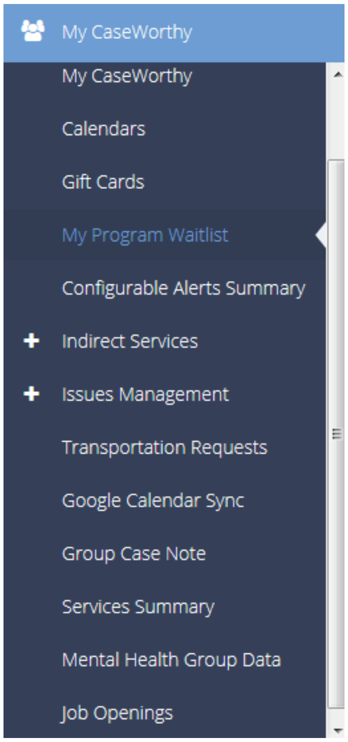
Gift Cards



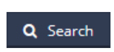
The next menu item in the My CaseWorthy menu group is the Gift Cards Dashboard. Use the links to access forms that allow the user to view the list of gift cards in their possession, commit cards to clients, assign cards to clients, or transfer the gift card to another user.

There are also links on the lower portion of the dashboard that can be placed on supervisor roles that allow for approval processes to be put into place prior to gift card assignments or transfers.

My Program Waitlist



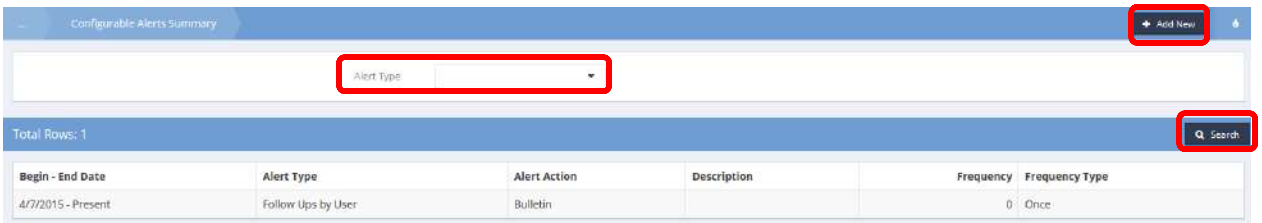
The next item on the My CaseWorthy menu is the My Program Waitlist form. This form is used to search for a list of clients on specific program waitlists.

Enter a date range, program name, and click the 

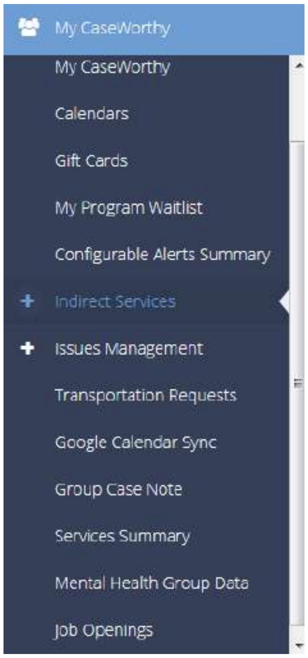
button. Results display in the spreadsheet below.

Configurable Alerts Summary

Alerts can be filtered by type by selecting from the Alert Type drop-down list and clicking the Search button. To create a new alert, click the Add New button.

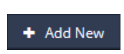


Indirect Services

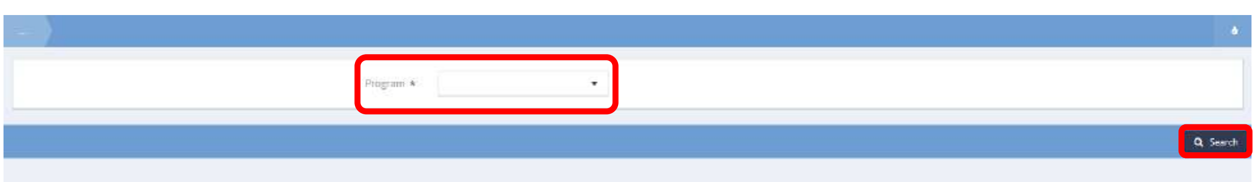


The next menu item in the My CaseWorthy menu group is the "Indirect Service" summary form. This form displays all of the indirect services a specific organization has provided.

Note: ***Indirect services are services provided that cannot be directly tied to a client. If a specific organization provides indirect services, contact an account manager for additional set-up information.***

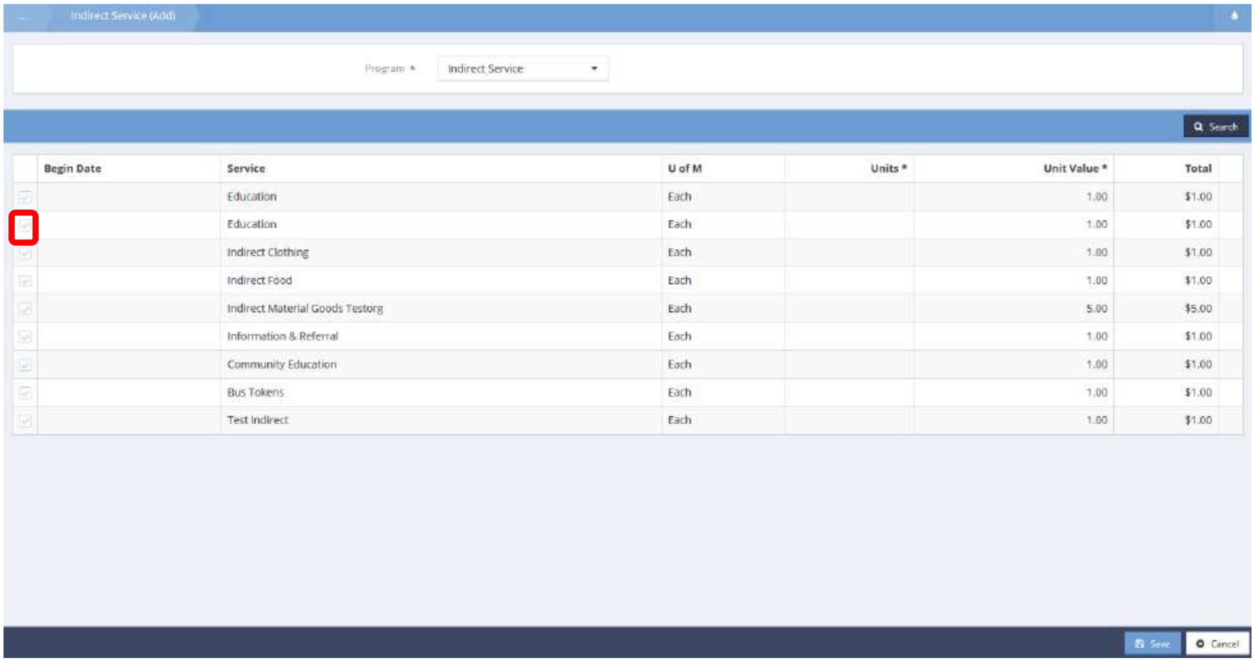
From the Indirect Service Summary, click the 

button. The Add Indirect Service form displays.

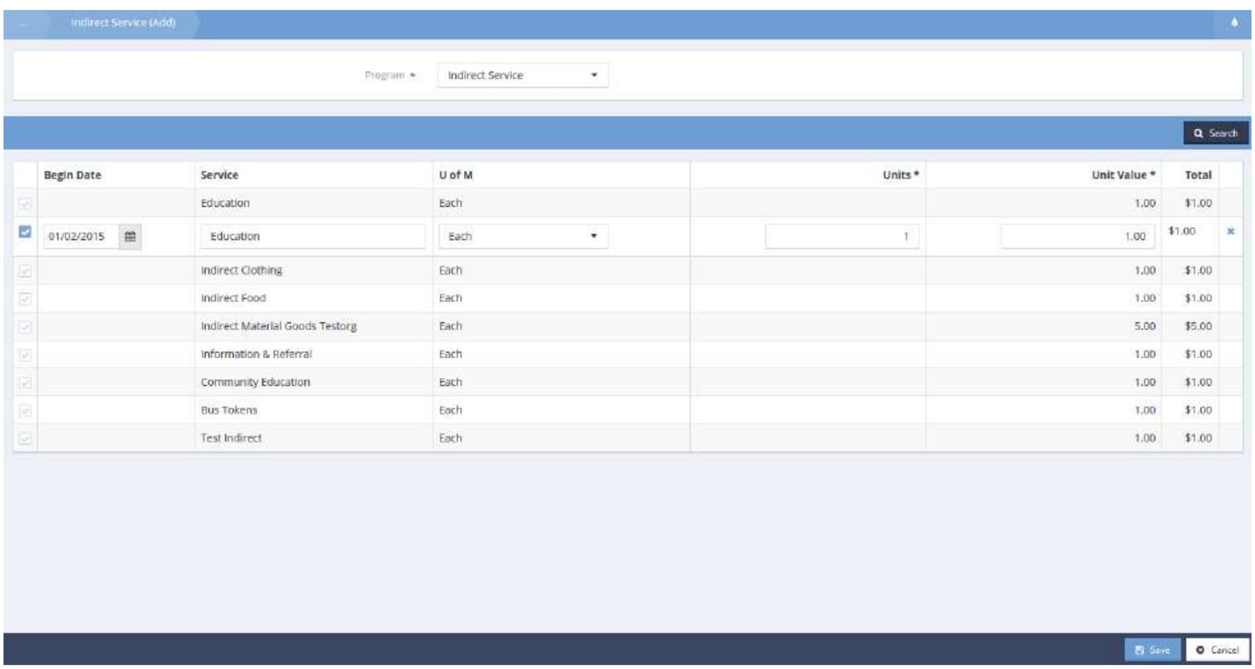


Choose a program from the drop-down list. Click the Search button.

The list of matching services displays.



Click the clear checkbox to add a service. The row expands.

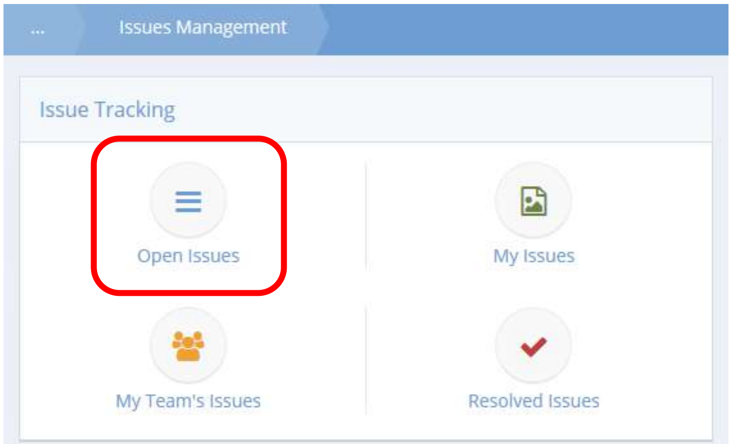


Enter the units and unit value. Click Save when finished.

Issues Management

Objective: Report and manage issues.

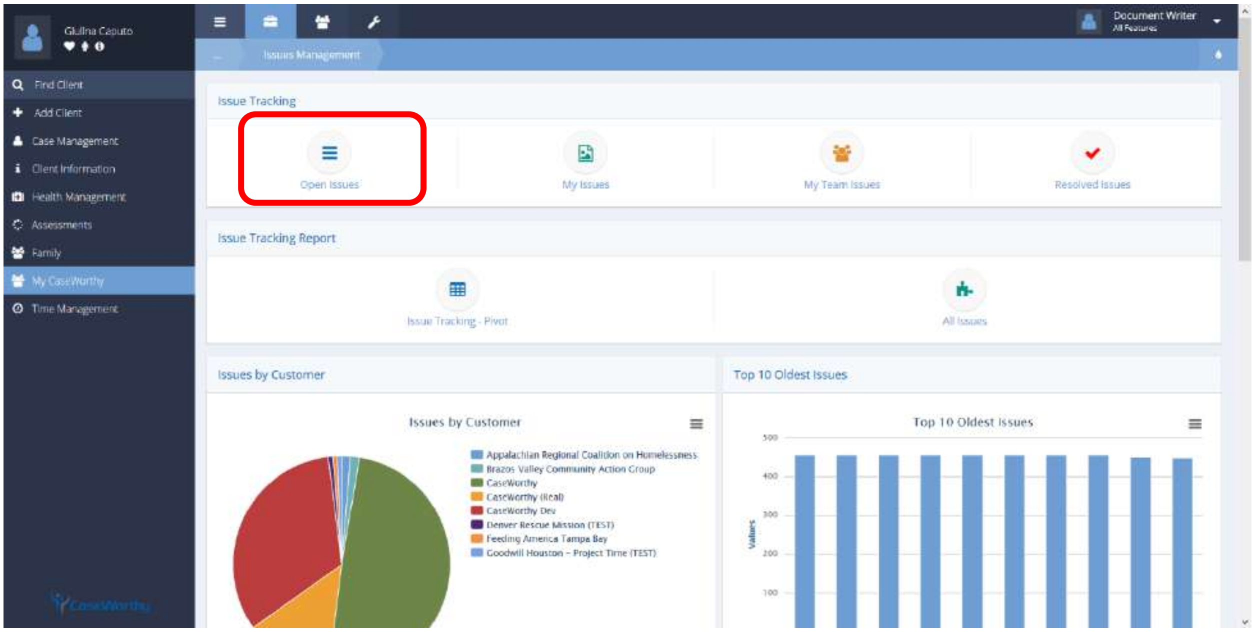
Each icon selected brings up a different form that displays a different subset of the issues. Open Issues displays all currently unresolved issues.



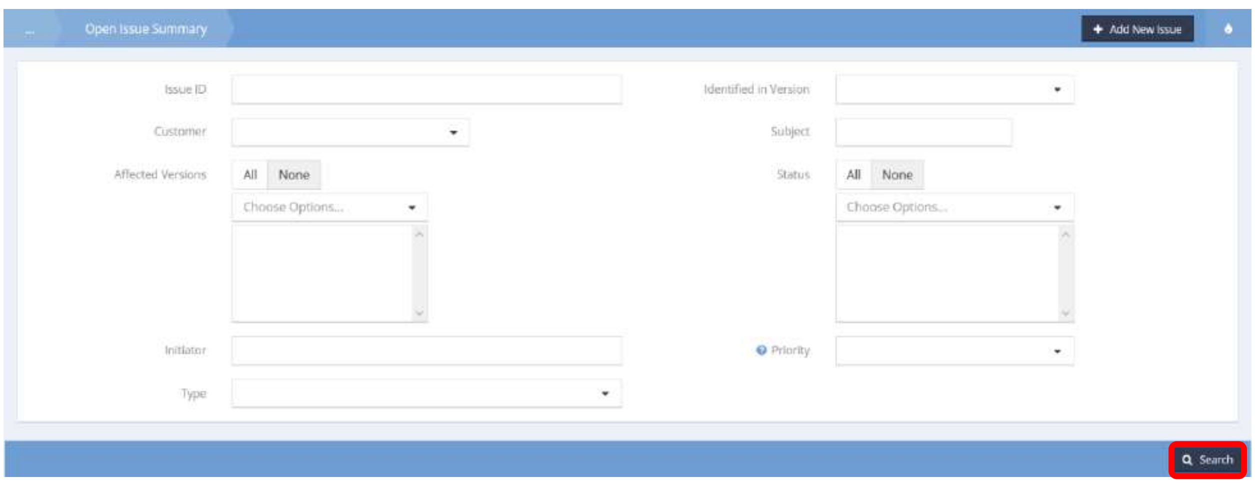
Open Issues

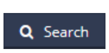
Objective: Add a new action or resolution to an issue.

Navigation: Case Management>My CaseWorthy>Issues Management



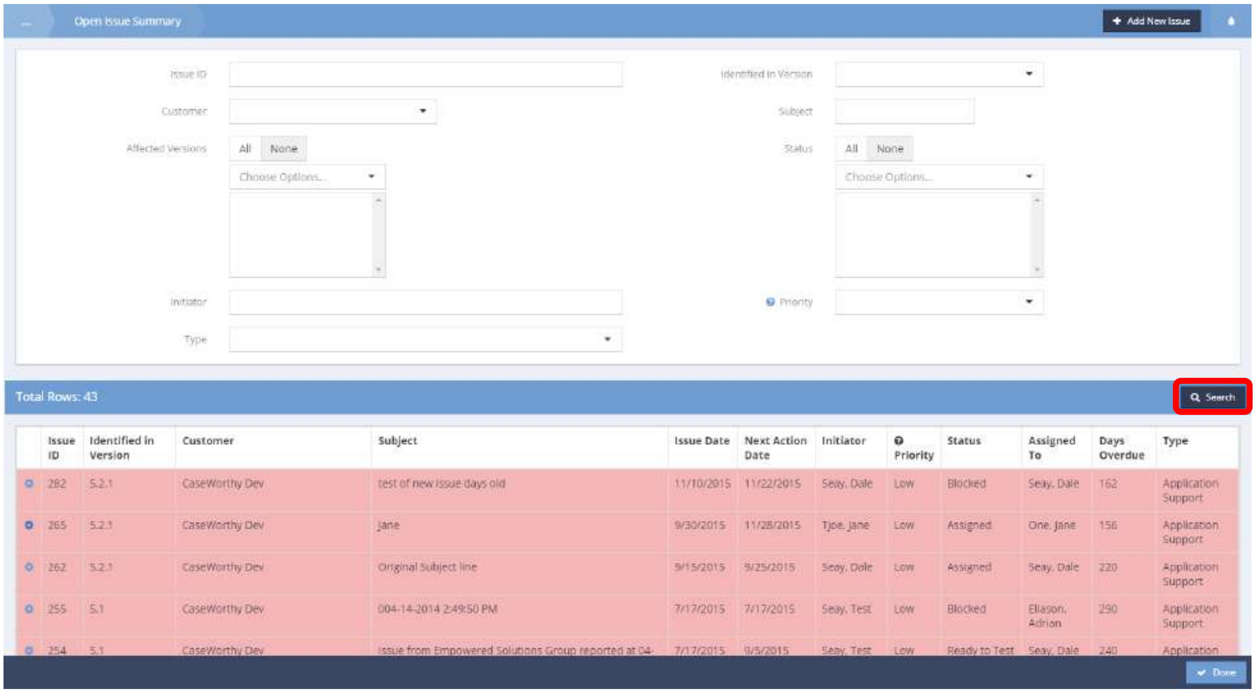
Select Open Issues from the Issue Tracking portion of the Issues Management dashboard. The Open Issue Summary form displays.



Click the 

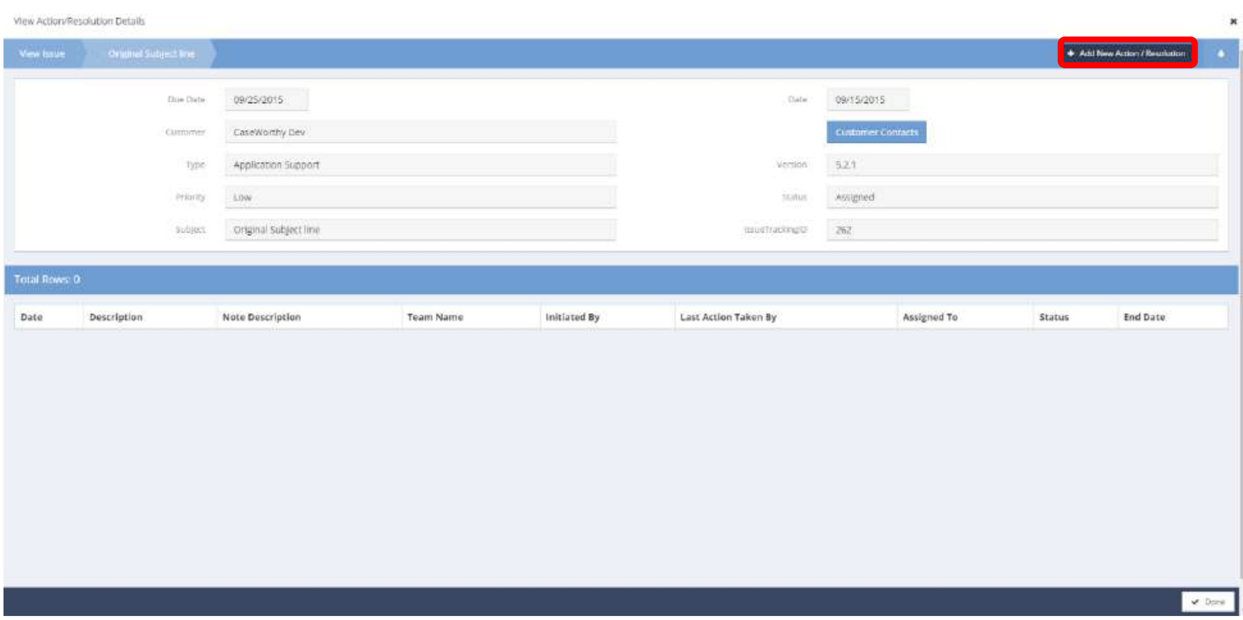
button to populate existing issues.

The list of open issues displays on the bottom half of the form.

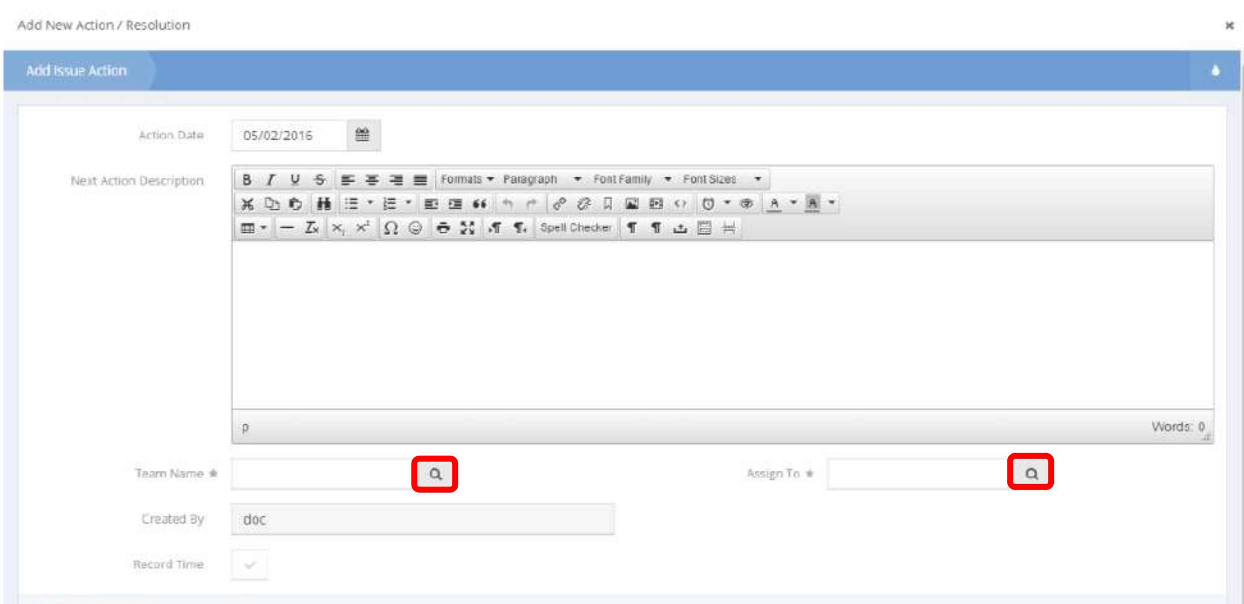


Click the action gear  icon associated with the desired issue and select the View Action/Resolution Details.

The View Action/Resolution Details form displays in a new pop-up window.

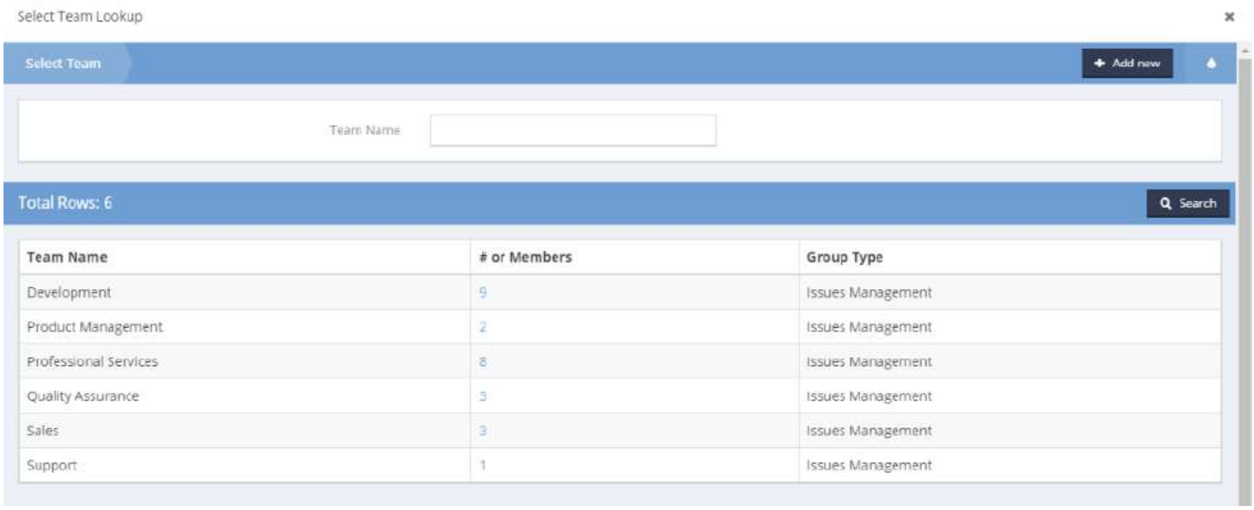


Click the **Add New Action / Resolution** button. The Add Issue Action form displays in a new pop-up window.



Enter information into required fields: Team Name, Assign To, Type, Version, Status, Priority, and Hours. To fill Team Name, click the magnifying glass lookup icon.

The Select Team form displays.



Select Team Lookup

Select Team

Add new

Team Name

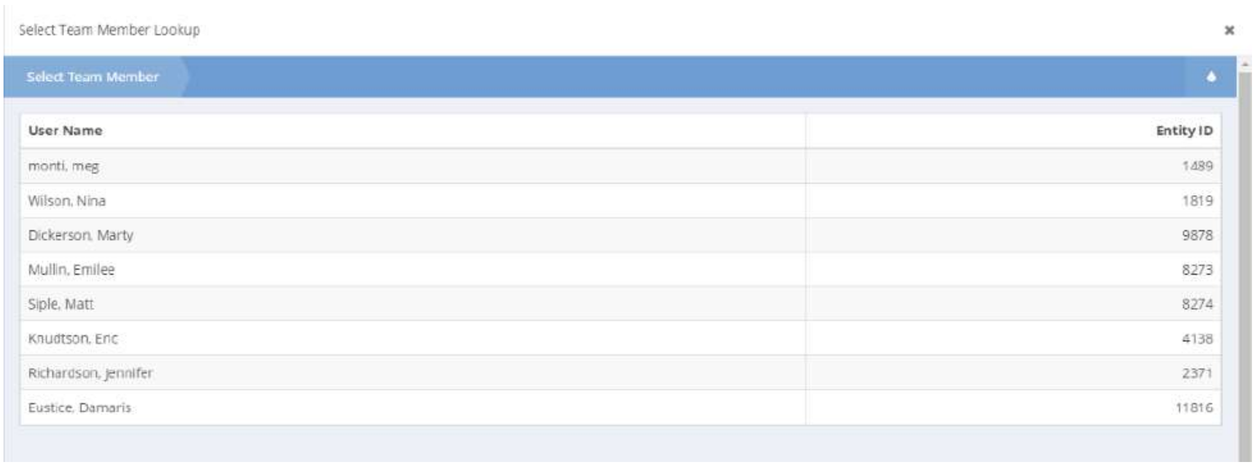
Total Rows: 6

Search

Team Name	# or Members	Group Type
Development	9	Issues Management
Product Management	2	Issues Management
Professional Services	8	Issues Management
Quality Assurance	3	Issues Management
Sales	3	Issues Management
Support	1	Issues Management

Select the desired team name. This form automatically closes upon selection.

To fill Assign To, click the magnifying glass lookup icon. The Select Team Member form displays.



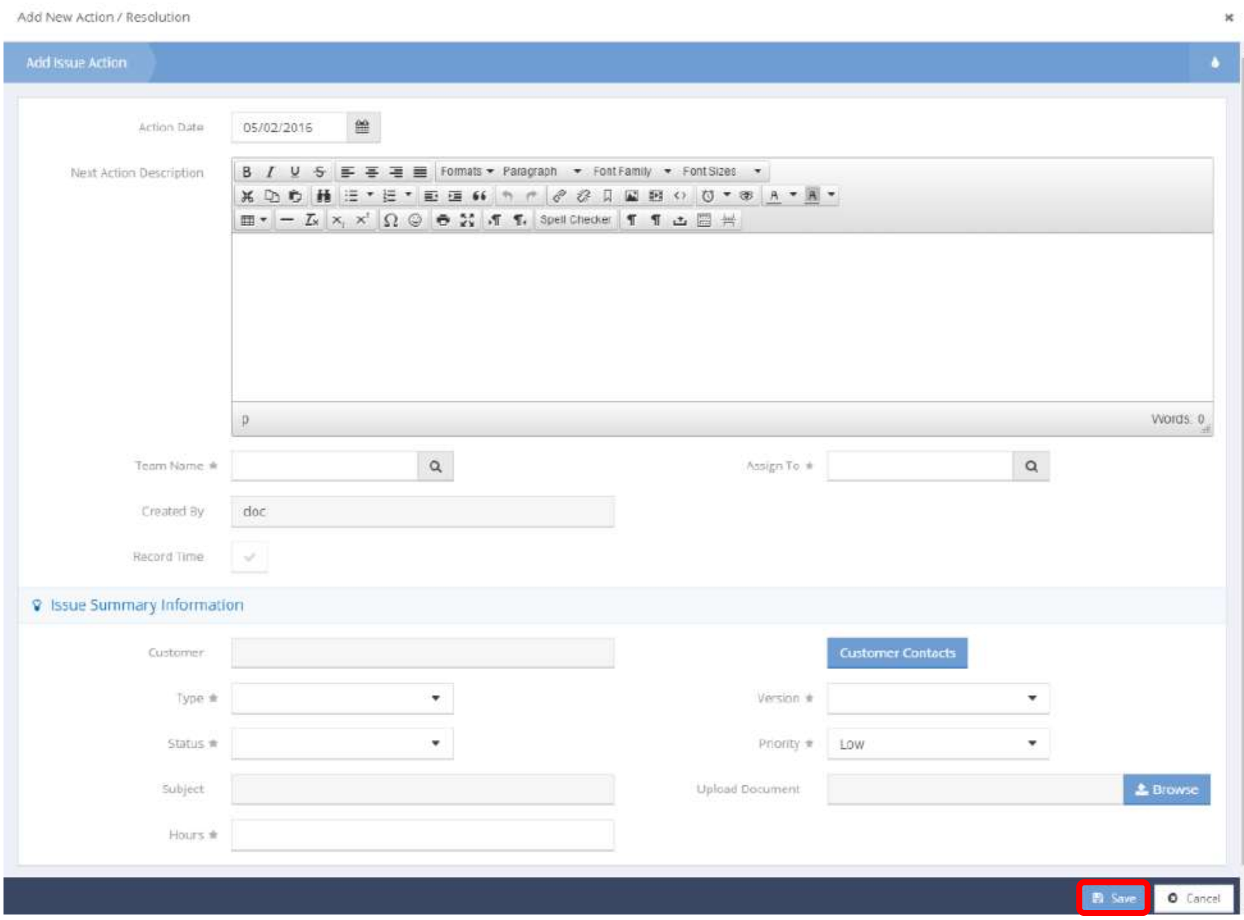
Select Team Member Lookup

Select Team Member

User Name	Entity ID
monti, meg	1489
Wilson, Nina	1819
Dickerson, Marty	9878
Mullin, Emilee	8273
Siple, Matt	8274
Knudtson, Eric	4138
Richardson, Jennifer	2371
Eustice, Damaris	11816

Select the desired team member. This form automatically closes upon selection.

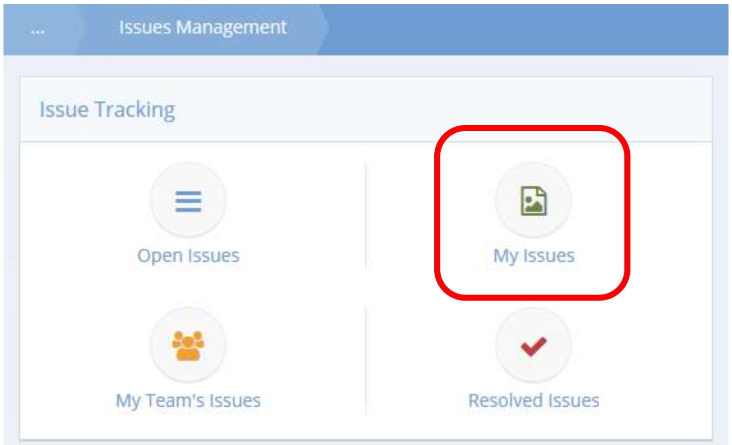
The Add Issue Action form displays.



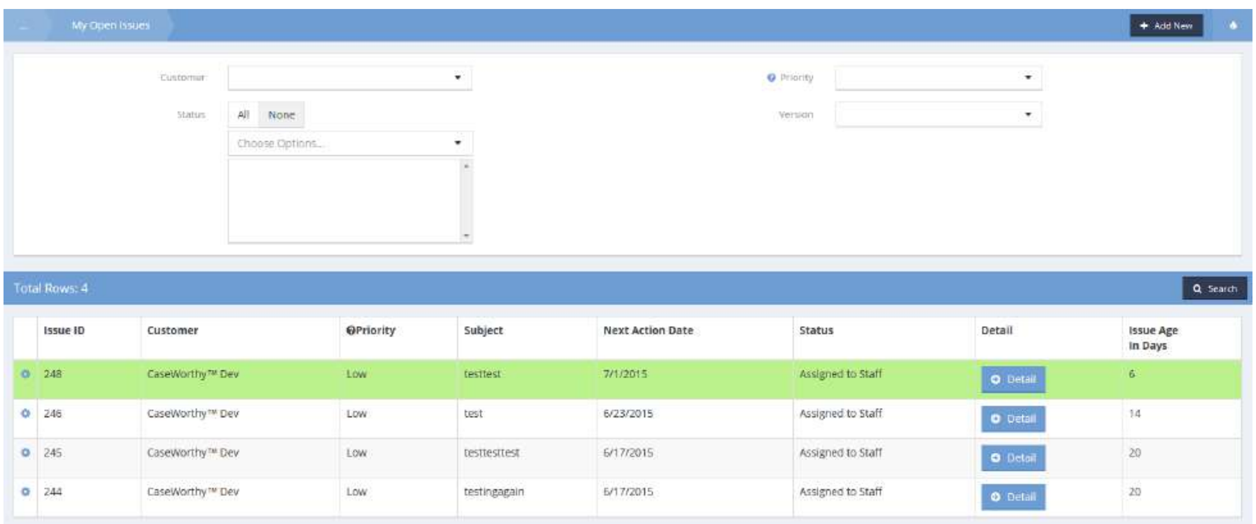
Fill remaining fields as desired. Click the 

button to save and exit.

My Issues

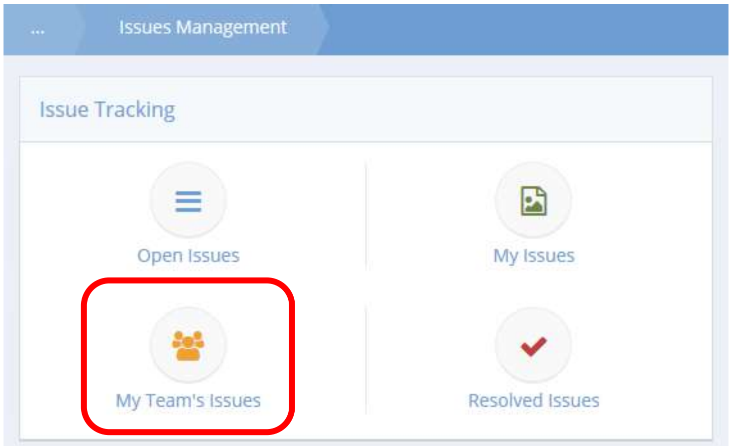


Click on the My Issues icon. The My Open Issues form displays a list of issues assigned to the current user.

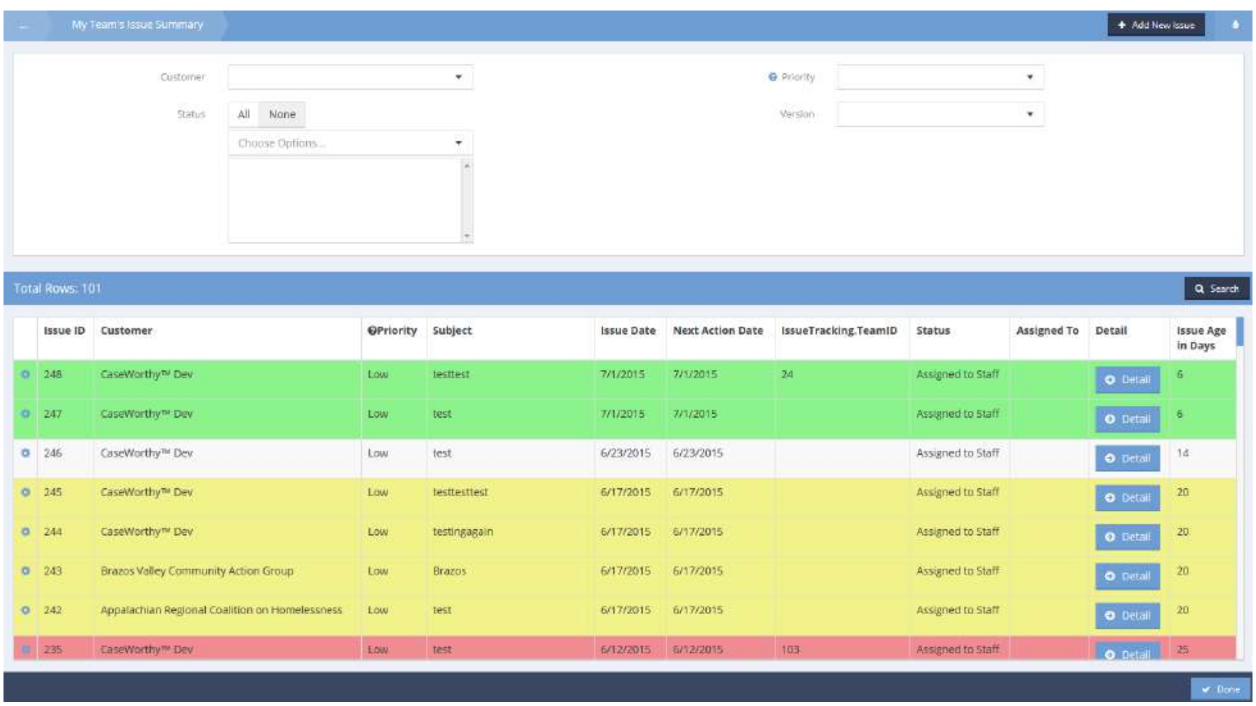


Adding and updating issues functionality is the same as documented for the Open Issues area.

My Team's Issues

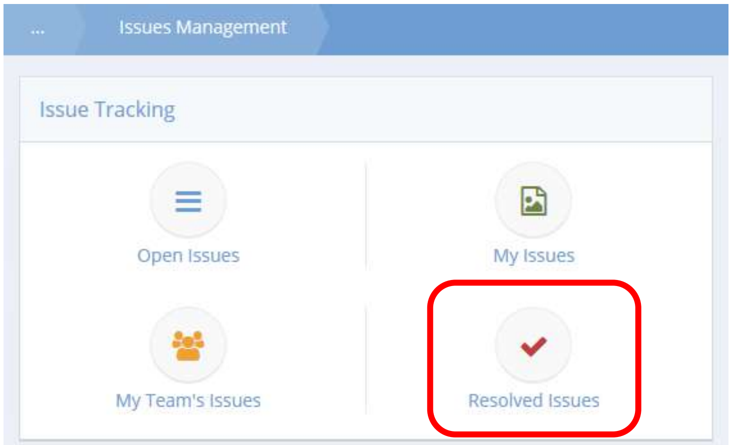


Click on the My Team's Issues icon. The My Team's Issue Summary form displays a list of issues assigned to the current user's team.

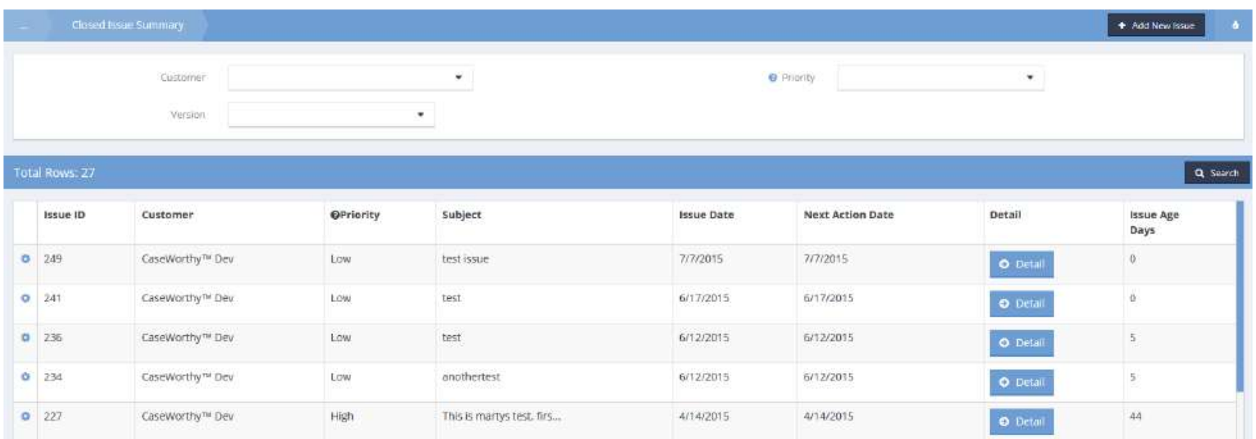


Adding and updating issues functionality is the same as documented for the Open Issues area.

Resolved Issues



Click on the Resolved Issues icon. The Closed Issue Summary form displays a list of issues that have been updated to a resolved status.

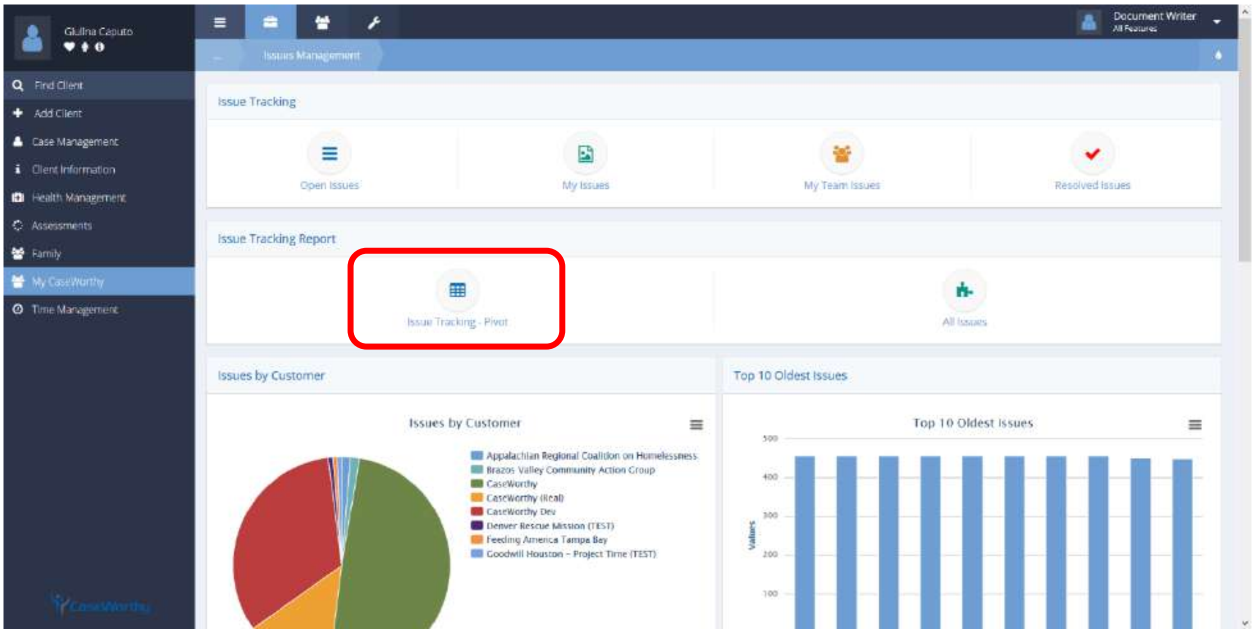


Adding and updating issues functionality is the same as documented for the Open Issues area.

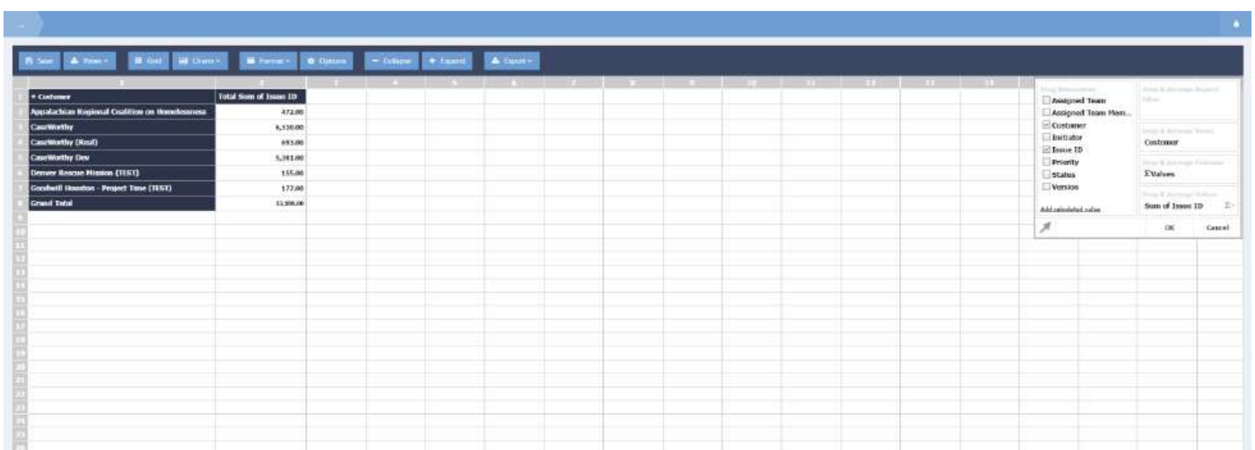
Issue Tracking – Pivot

Objective: View issues in pivot table format.

Navigation: Case Management>My CaseWorthy>Issues Management



Select Issue Tracking – Pivot from the Issue Tracking Report portion of the Issues Management dashboard. The Issue Tracking Pivot form displays.

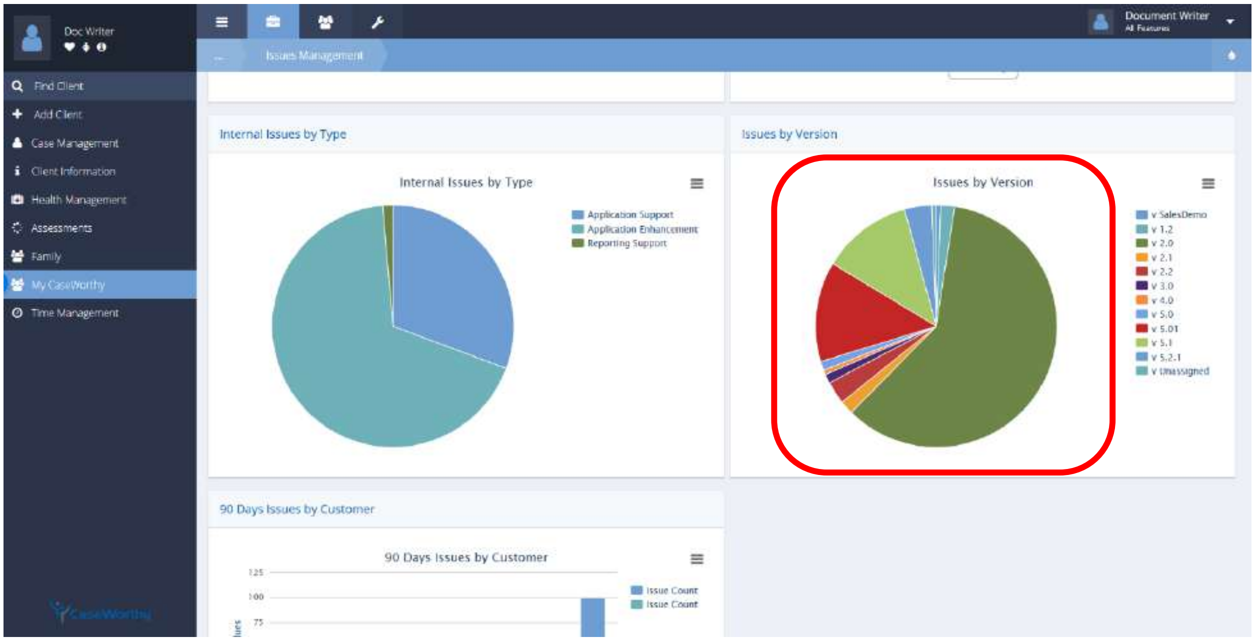


Apply settings for view and presentation as desired.

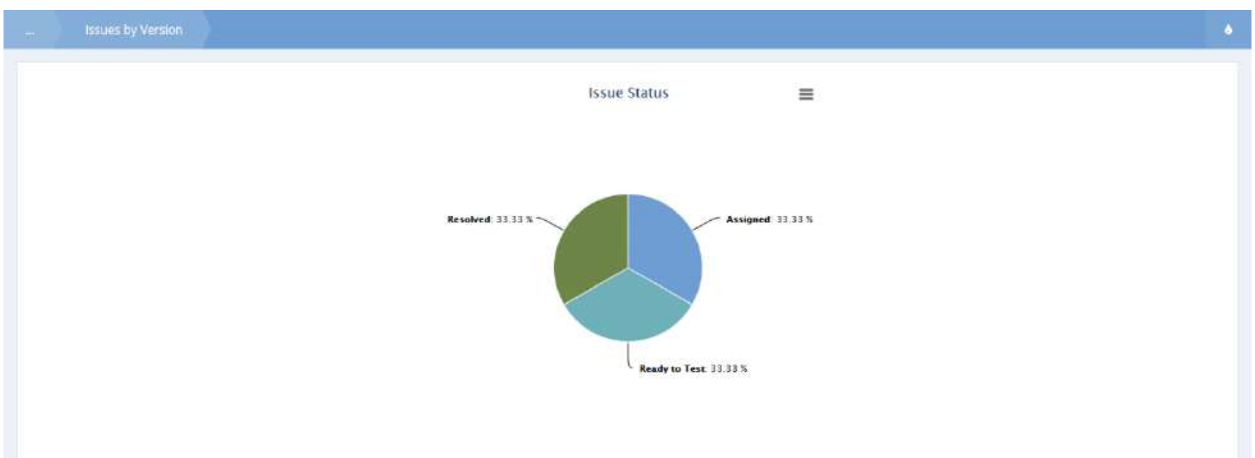
Issues by Version

Objective: View issues by software version.

Navigation: Case Management>My CaseWorthy>Issues Management



Click on the desired section of the pie chart associated with the Issues by Version portion of the Issues Management dashboard. The Issues by Version form displays.

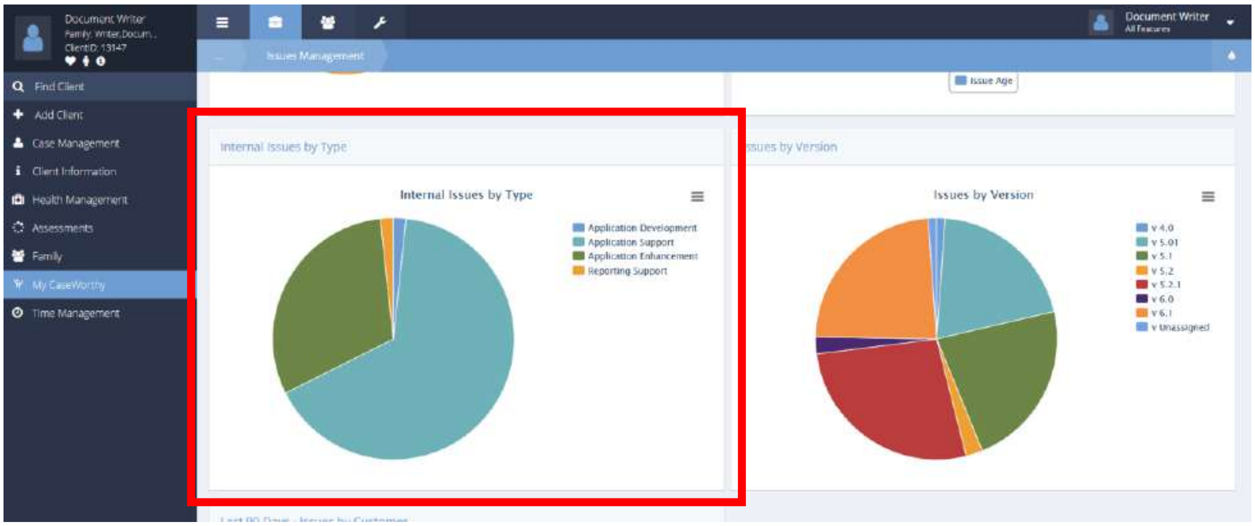


At the writing of this document, this is a view only form. Links to issues by status have not yet been set up. Select the ✔ Done button when finished.

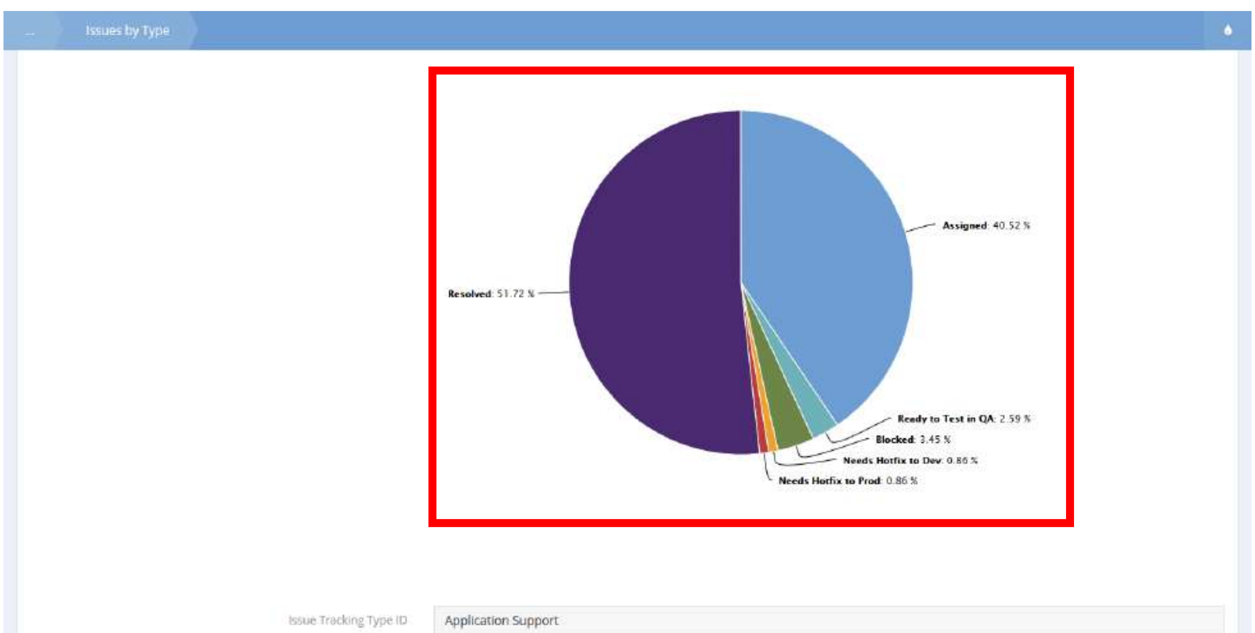
Internal Issues by Type

Objective: View issues by status.

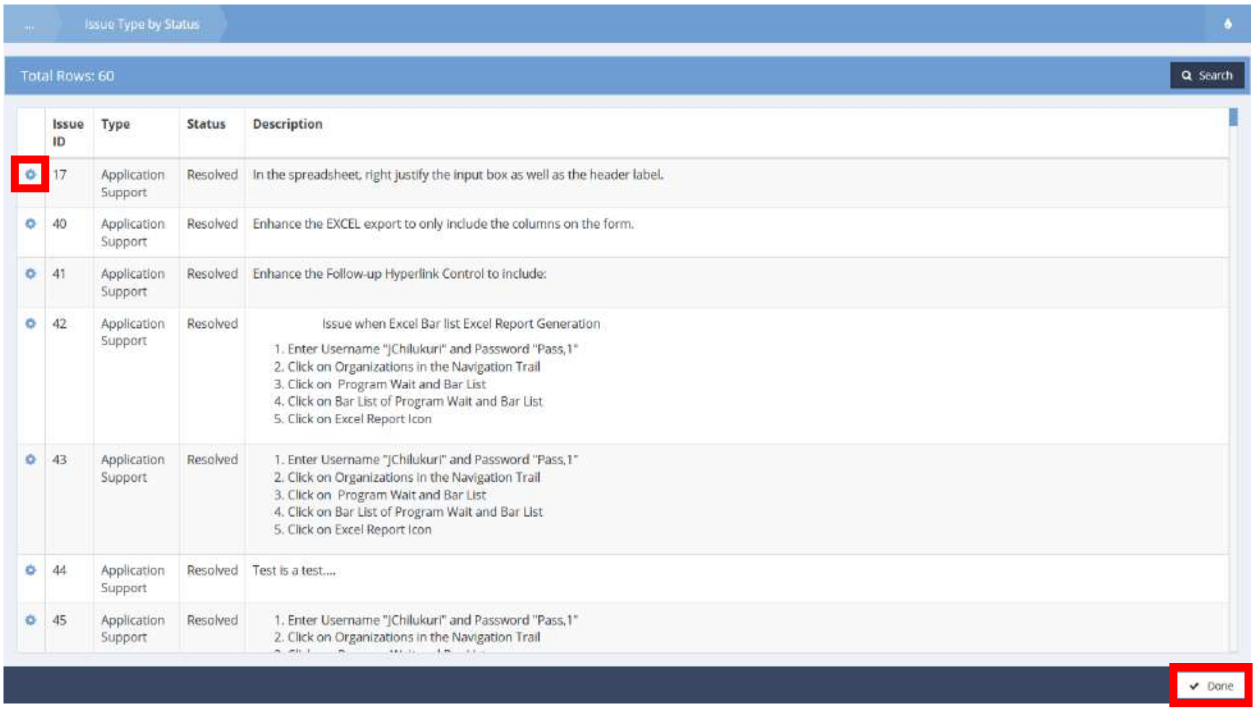
Navigation: Case Management>My CaseWorthy>Issues Management



Select the desired section of the pie chart displayed on the Internal Issues by Type portion of the Issues Management dashboard. The Issues by Type form displays (specific to the section of the pie chart selected).



Select the desired section of the pie chart. The Issue Type by Status form displays.



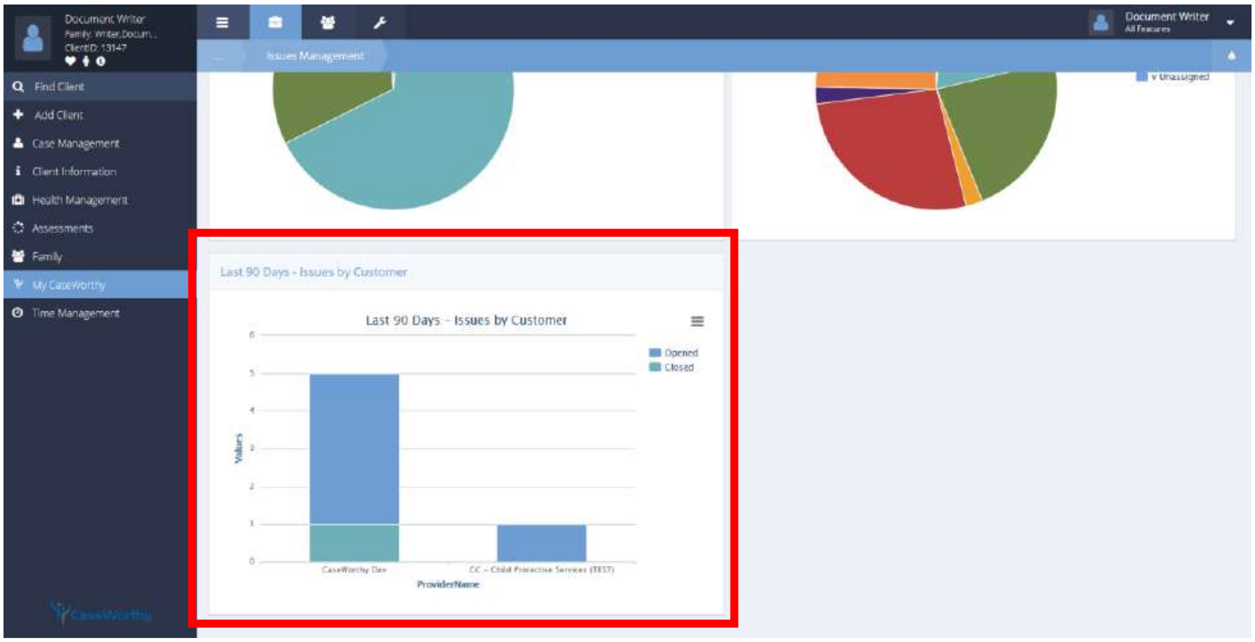
Issue ID	Type	Status	Description
17	Application Support	Resolved	In the spreadsheet, right justify the input box as well as the header label.
40	Application Support	Resolved	Enhance the EXCEL export to only include the columns on the form.
41	Application Support	Resolved	Enhance the Follow-up Hyperlink Control to include:
42	Application Support	Resolved	Issue when Excel Bar list Excel Report Generation 1. Enter Username "jChilukuri" and Password "Pass,1" 2. Click on Organizations in the Navigation Trail 3. Click on Program Wait and Bar List 4. Click on Bar List of Program Wait and Bar List 5. Click on Excel Report Icon
43	Application Support	Resolved	1. Enter Username "jChilukuri" and Password "Pass,1" 2. Click on Organizations in the Navigation Trail 3. Click on Program Wait and Bar List 4. Click on Bar List of Program Wait and Bar List 5. Click on Excel Report Icon
44	Application Support	Resolved	Test is a test....
45	Application Support	Resolved	1. Enter Username "jChilukuri" and Password "Pass,1" 2. Click on Organizations in the Navigation Trail

Use the action gear icon to View Action/Resolution Details and View Documents. Click the ✔ Done button when finished.

Last 90 days – Issues by Customer

Objective: View issues by customer.

Navigation: Case Management>My CaseWorthy>Issues Management



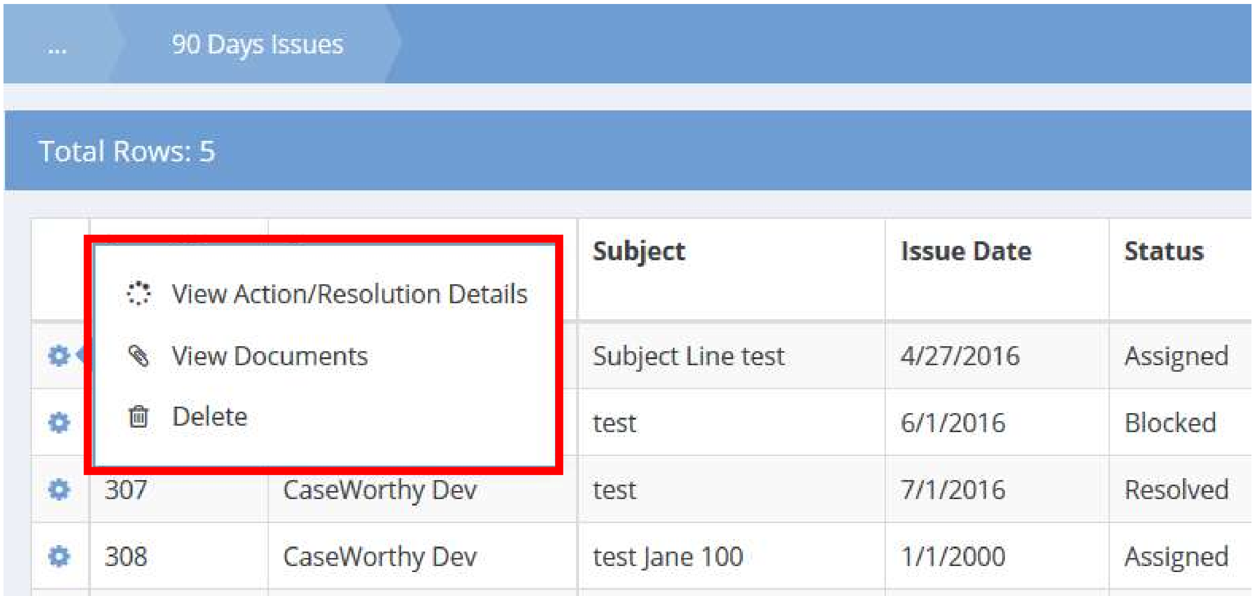
Select the desired section of the bar graph on the Last 90 Days – Issues by Customer portion of the dashboard. The 90 Days Issues form displays (specific to the section of the bar graph selected).

90 Days Issues

Total Rows: 4

	Issue ID	Customer	Subject	Issue Date	Status	Next Action Date	Priority	Assigned To	Number Of Days Since Creation	Action
	306	CaseWorthy Dev	test	6/1/2016	Blocked	6/19/2016	Low	Seay, Dale	65	Opened
	307	CaseWorthy Dev	test	7/1/2016	Resolved	7/11/2016	Low	One, Jane	35	Opened
	308	CaseWorthy Dev	test Jane 100	1/1/2000	Assigned	7/16/2000	Low	One, Jane		Opened
	307	CaseWorthy Dev	test	7/1/2016	Resolved	7/11/2016	Low	One, Jane	35	Closed

Issues created within the last 90 days display. Click the action gear icon associated with the desired issue to View Action / Resolution Details, View Documents, or Delete by selecting the appropriate menu option.



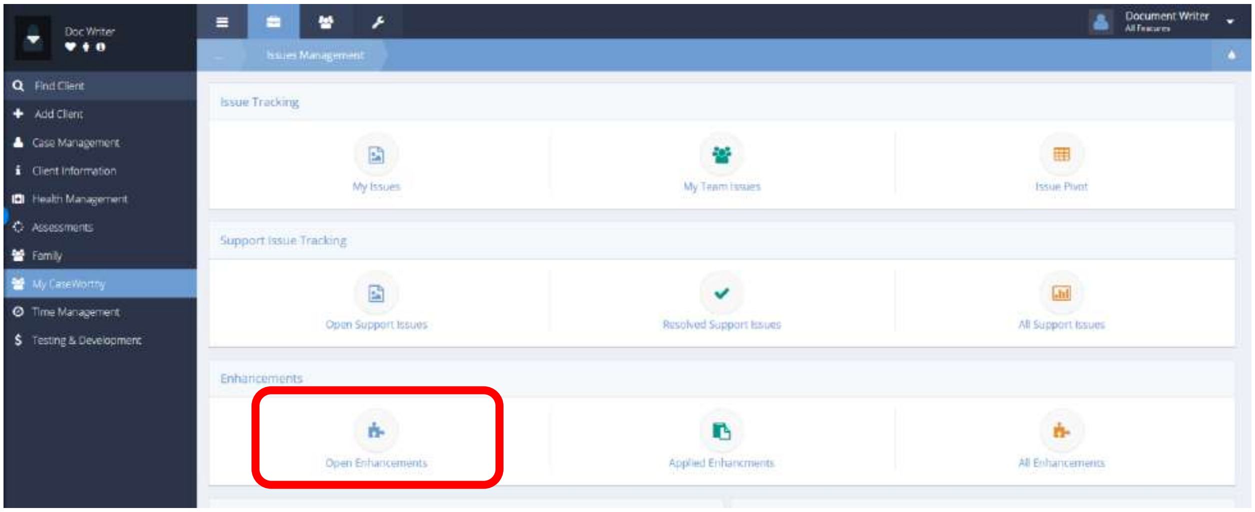
Click the 

button when finished.

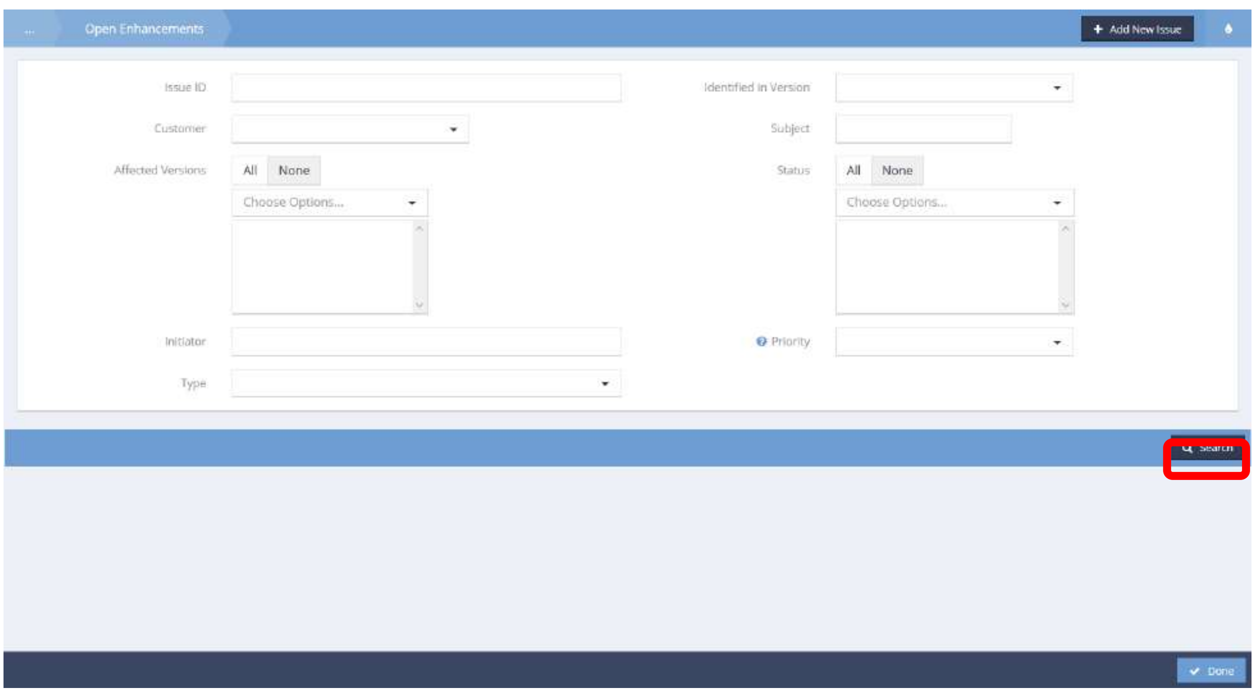
Enhancements

Objective: View open enhancement issues.

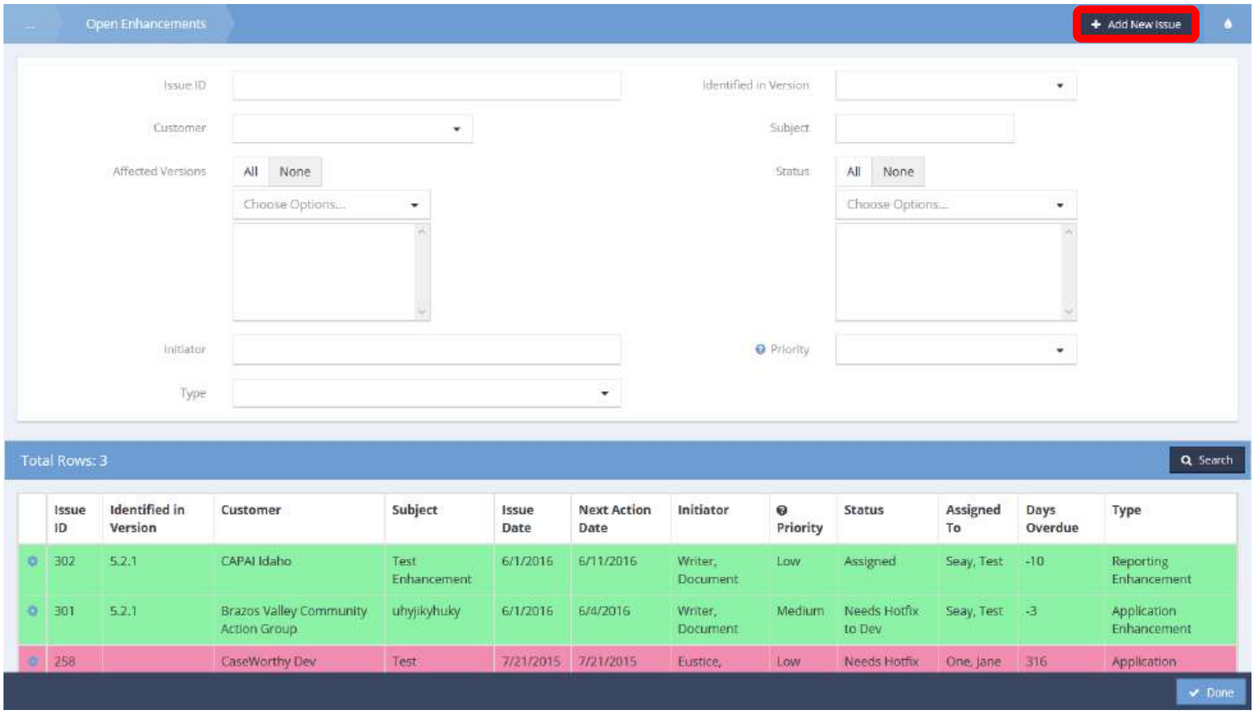
Navigation: Case Management>My CaseWorthy>Issues Management



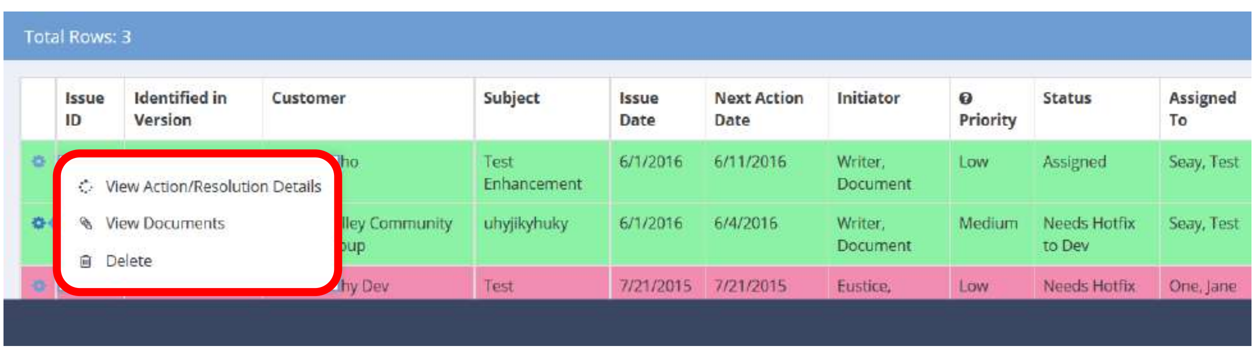
Select Open Enhancements from the Enhancements portion of the Issues Management dashboard. The Open Enhancements form displays.



Enter valid search criteria into relevant fields and click the Search button to populate results. Simply clicking the Search button without entering any search criteria populates *all* existing open enhancement issues.



To add a new enhancement issue, click the Add New Issue button. To view details, documents, or to delete an enhancement issue, click the action gear icon associated with the desired issue and select the appropriate menu item.

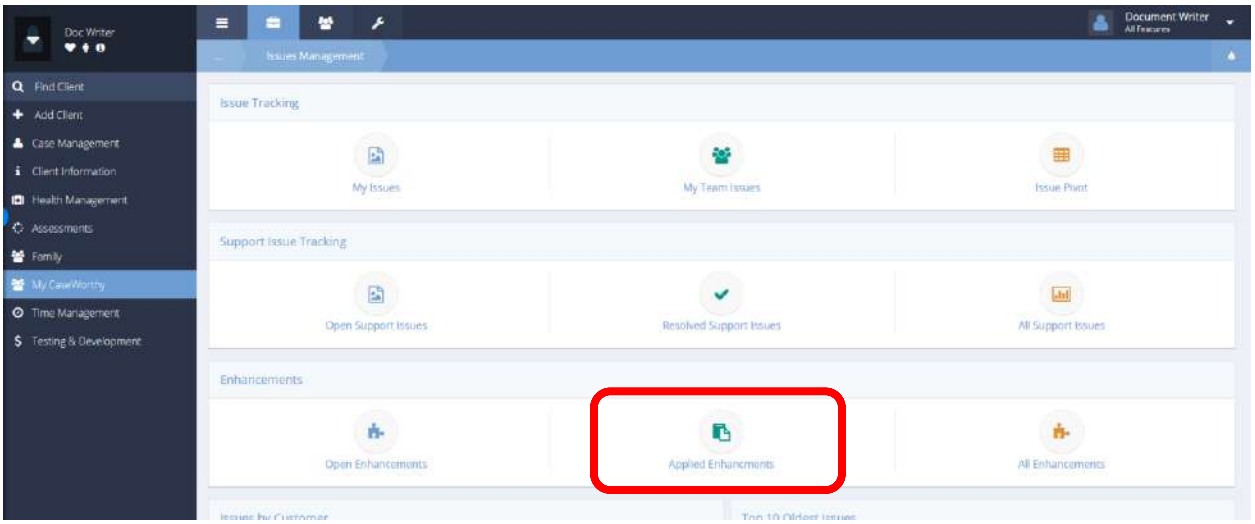


Click the Done button when finished.

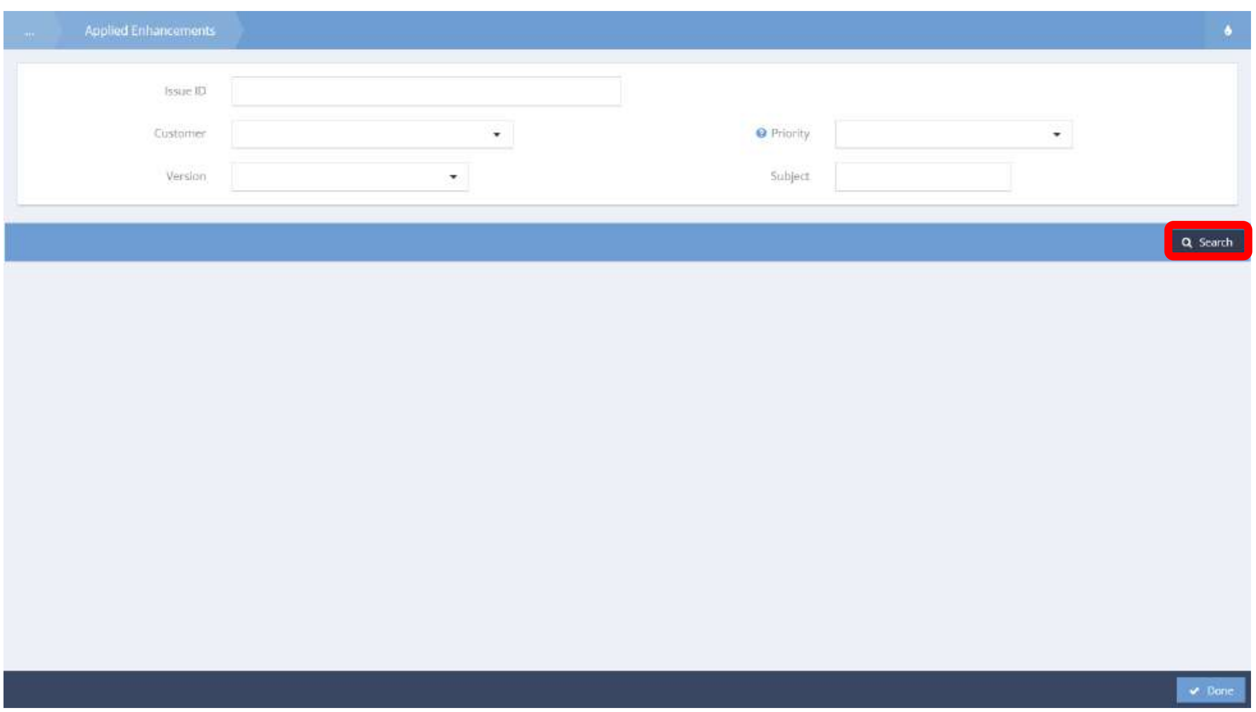
Applied Enhancements

Objective: View resolved enhancement issues.

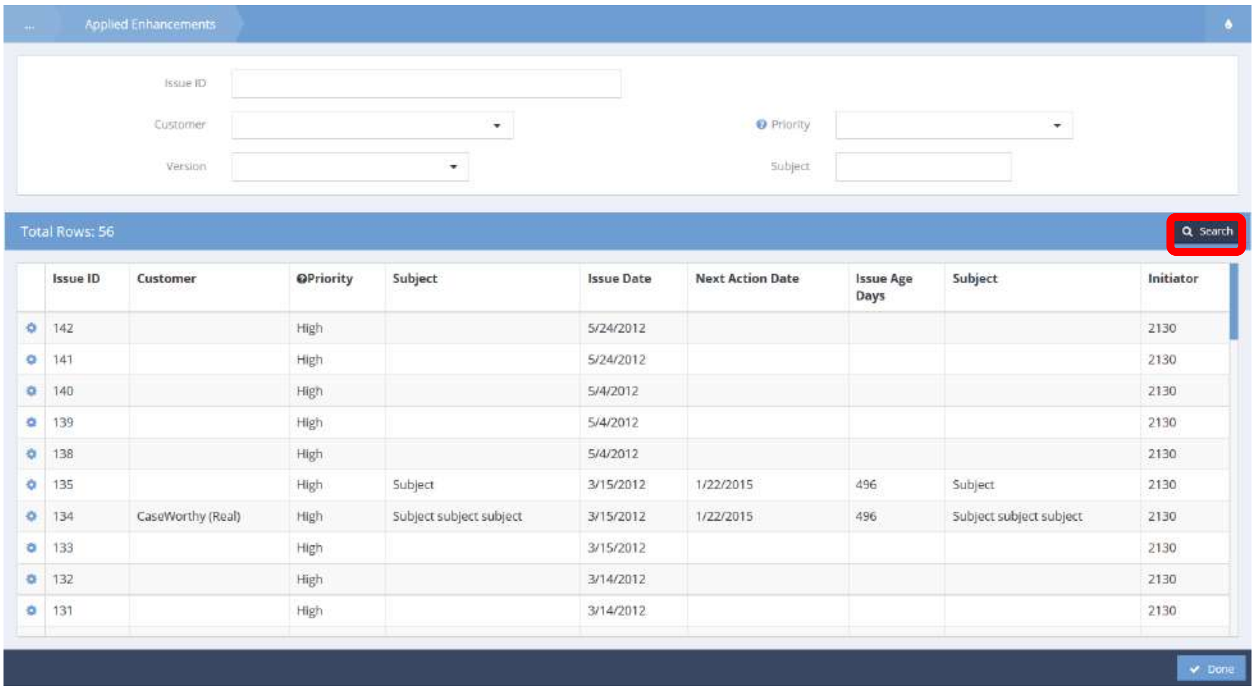
Navigation: Case Management>My CaseWorthy>Issues Management



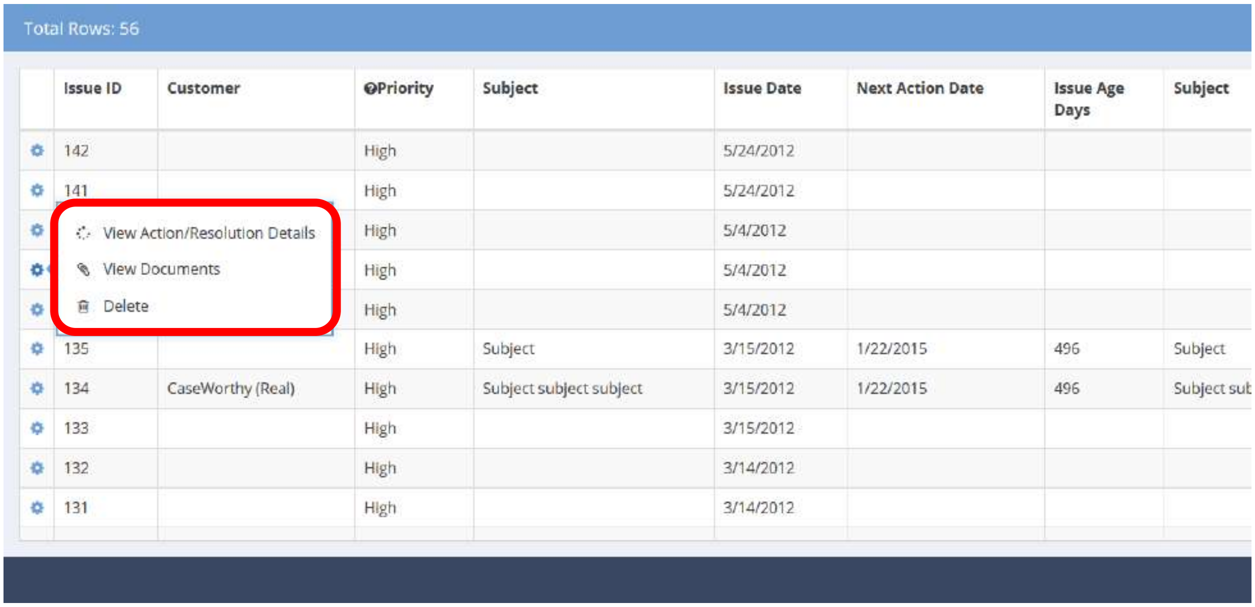
Select Applied Enhancements from the Enhancements portion of the Issues Management dashboard. The Applied Enhancements form displays.



Enter search criteria into relevant fields and click the Search button to populate results. Simply clicking the Search button with no search criteria populates all existing resolved enhancement issues.



To view details, documents, or to delete an enhancement issue, click on the action gear icon associated with the desired issue. Select the appropriate menu item.



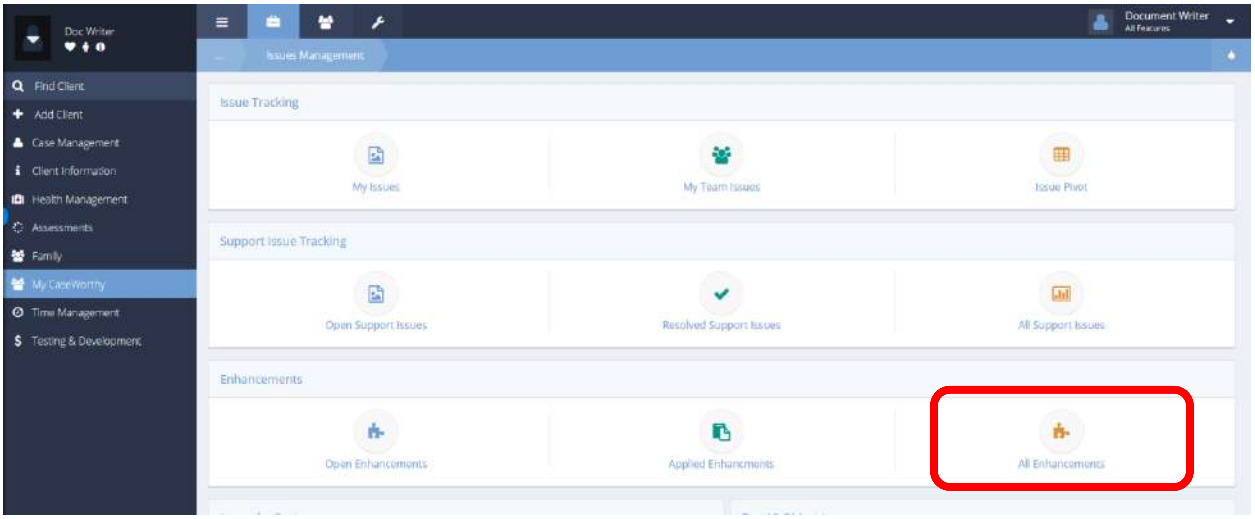
Issue ID	Customer	Priority	Subject	Issue Date	Next Action Date	Issue Age Days	Subject
142		High		5/24/2012			
141		High		5/24/2012			
		High		5/4/2012			
		High		5/4/2012			
		High		5/4/2012			
135		High	Subject	3/15/2012	1/22/2015	496	Subject
134	CaseWorthy (Real)	High	Subject subject subject	3/15/2012	1/22/2015	496	Subject sub
133		High		3/15/2012			
132		High		3/14/2012			
131		High		3/14/2012			

Click the Done button when finished.

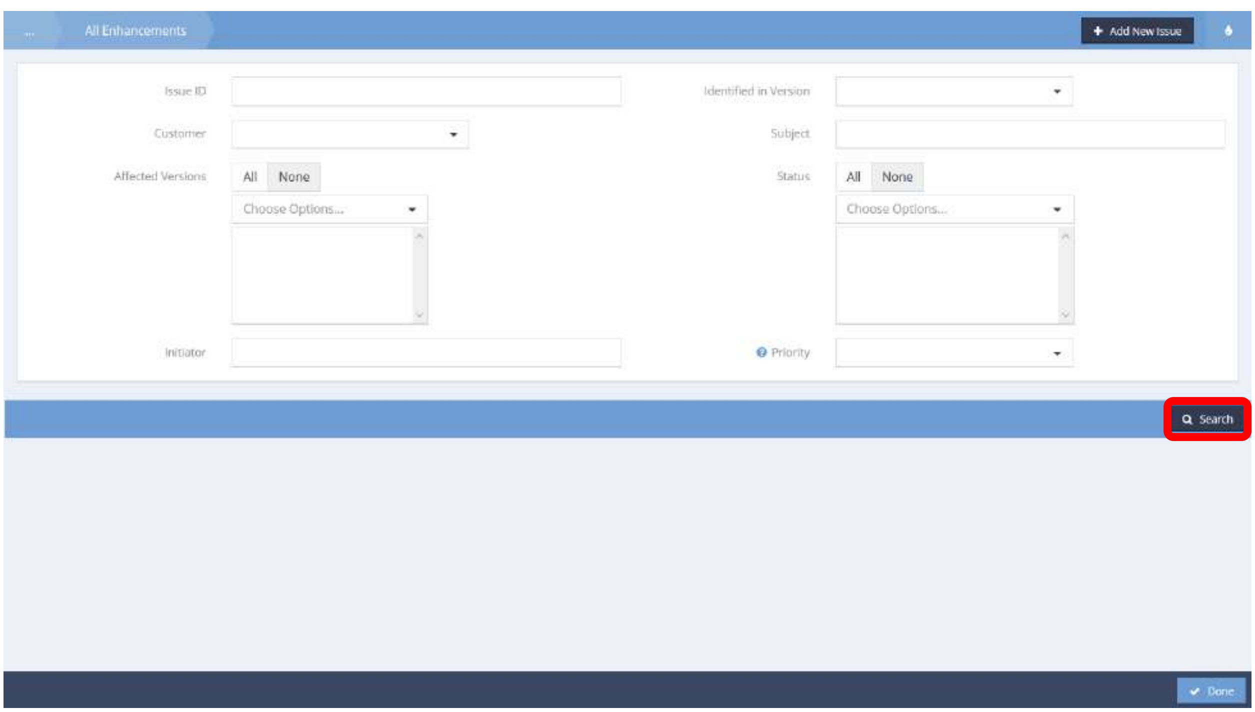
All Enhancements

Objective: View all enhancement issues.

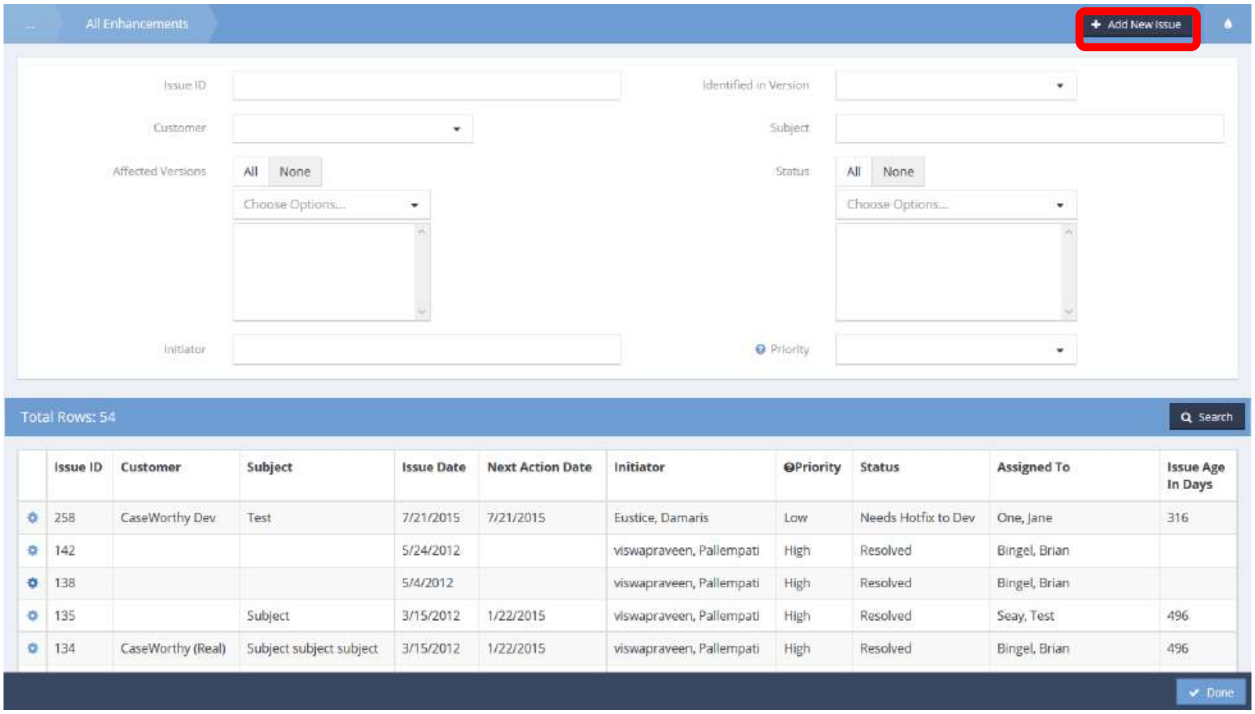
Navigation: Case Management>My CaseWorthy>Issues Management



Select All Enhancements from the Enhancements portion of the Issues Management dashboard. The All Enhancements form displays.



Enter search criteria into relevant fields and click the Search button to populate results. Simply clicking the Search button without any search criteria populates all existing enhancement issues.



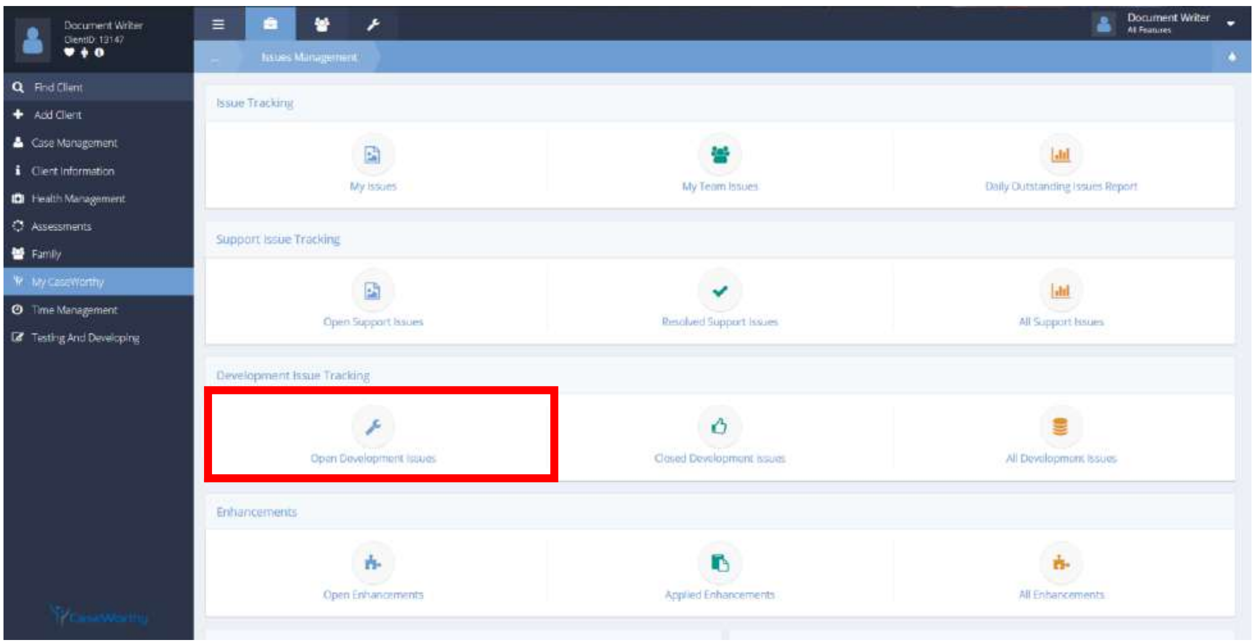
To add a new issue, click the Add New Issue button. To view details, documents, or delete an existing enhancement issue, click the action gear icon associated with the desired issue. Select the appropriate menu item.

Click the Done button when finished.

Development Issues

Objective: View open development issues.

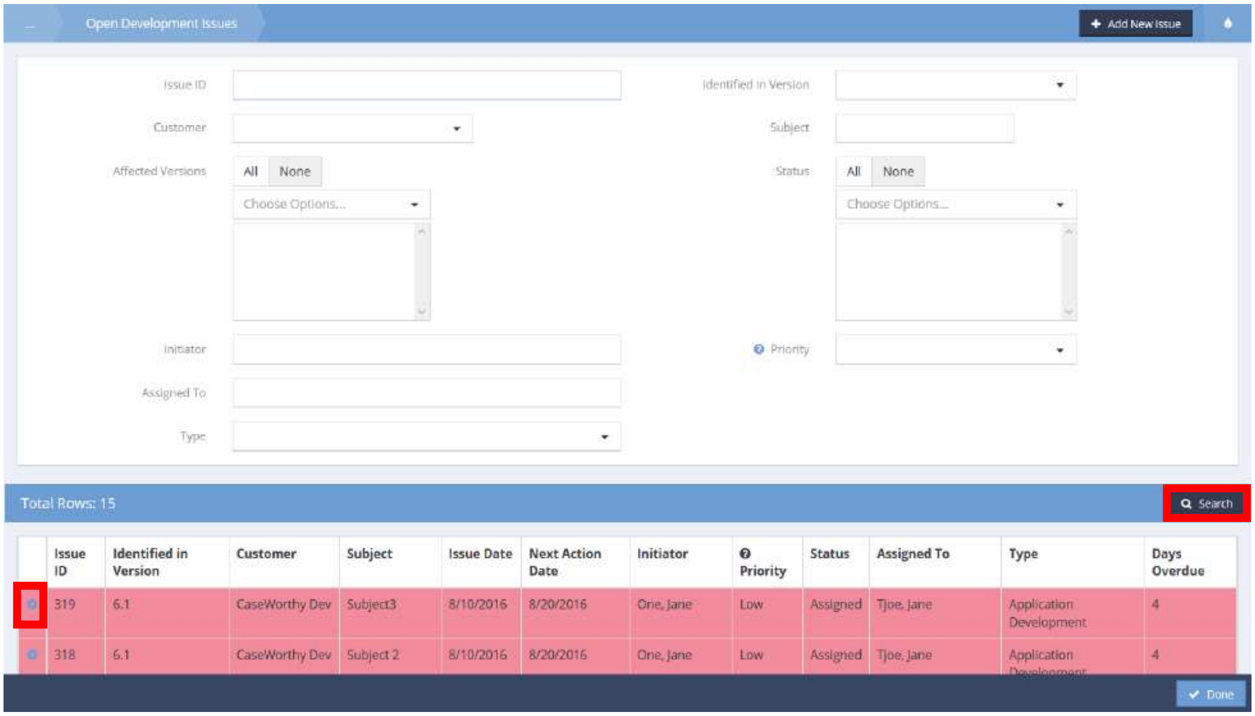
Navigation: Case Management>My CaseWorthy>Issues Management



Select Open Development Issues from the Development Issue Tracking portion of the Issues Management dashboard.

The Open Development Issues form displays all open issues related to current development.

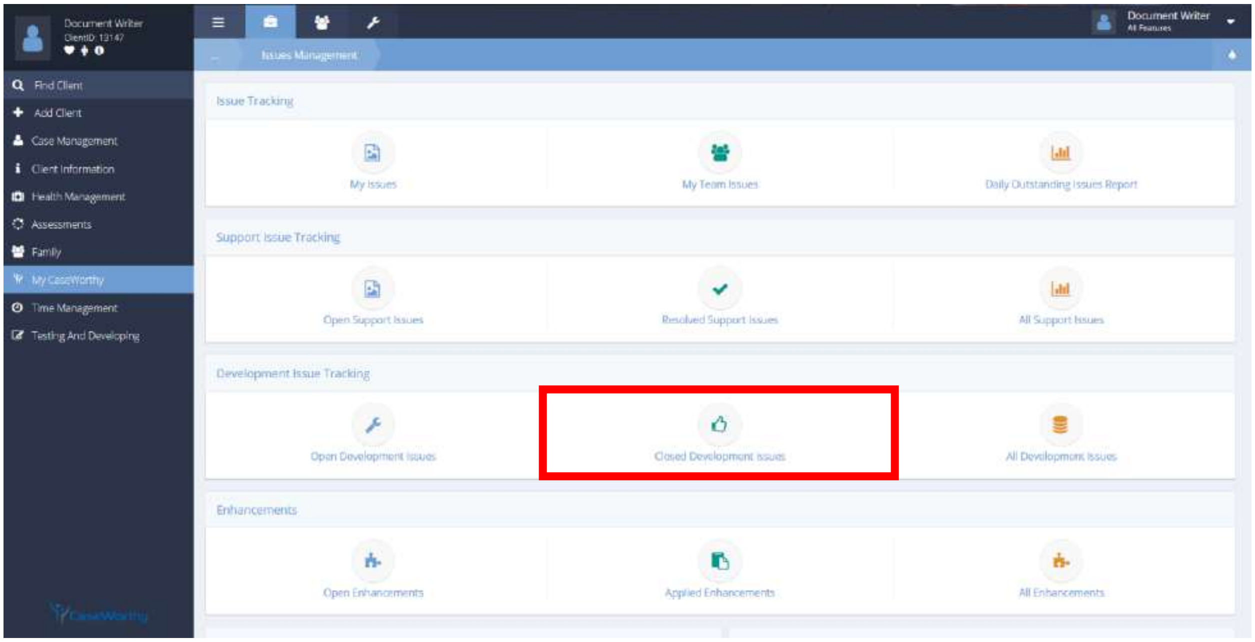
Open Development Issues (9001)



Use the fields at the top of the form to filter the search results. Click the Search button to populate results. To add a new issue, click the Add New Issue button. Click the action gear icon associated with the desired issue to View Action/Resolution Details, View Documents, or Delete. Click the Done button when finished.

Objective: View closed development issues.

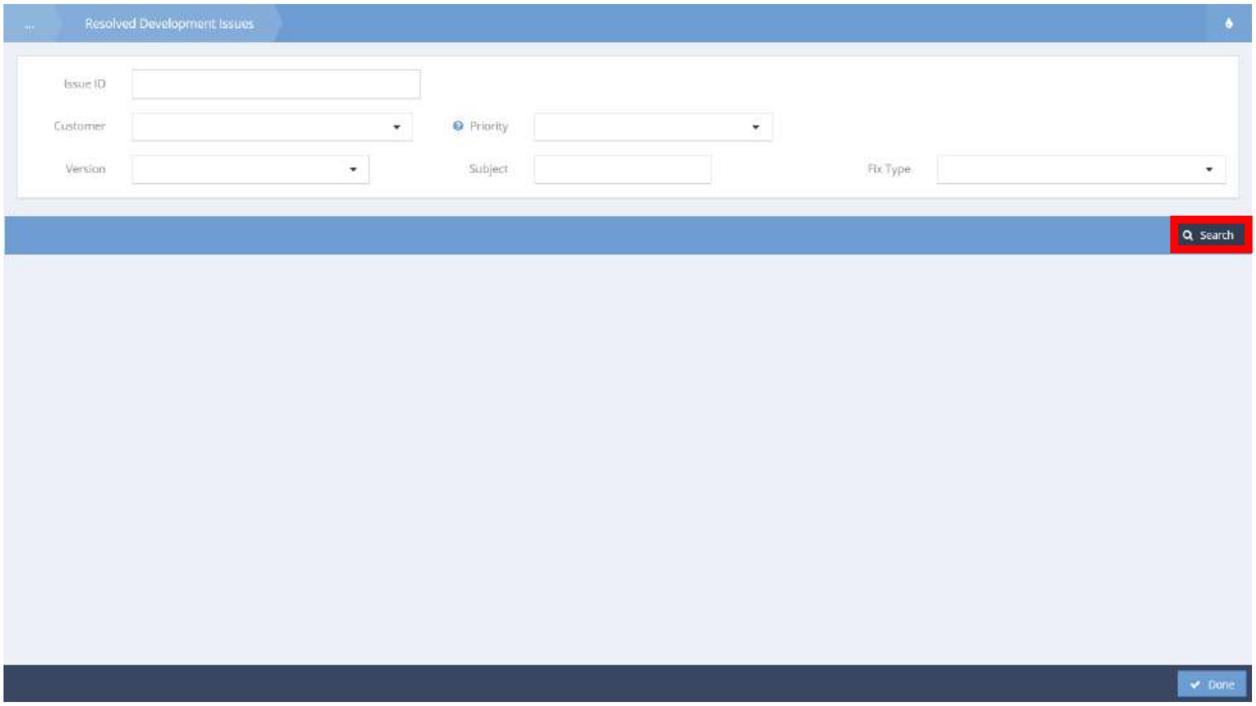
Navigation: Case Management>My CaseWorthy>Issues Management



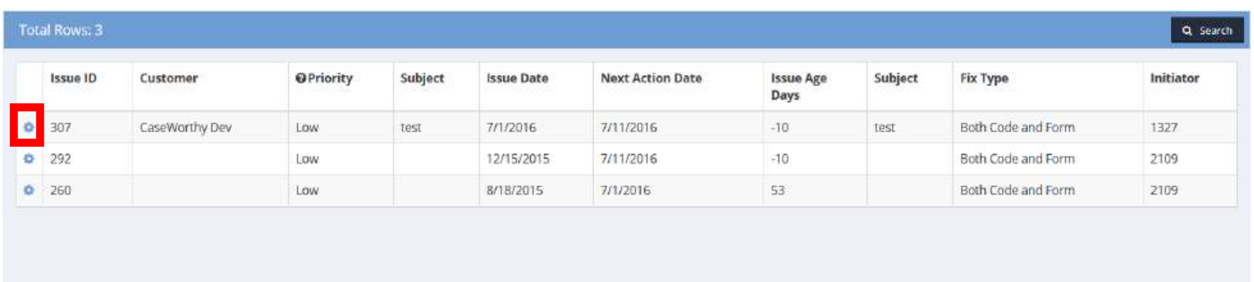
Select Closed Development Issues from the Development Issue Tracking portion of the Issues Management dashboard.

The Resolved Development Issues form displays all completed issues relating to current (at the time of the issue) development.

Resolved Development Issues (9002)



Use the fields at the top of the form to filter results. Click the Search button to populate results.

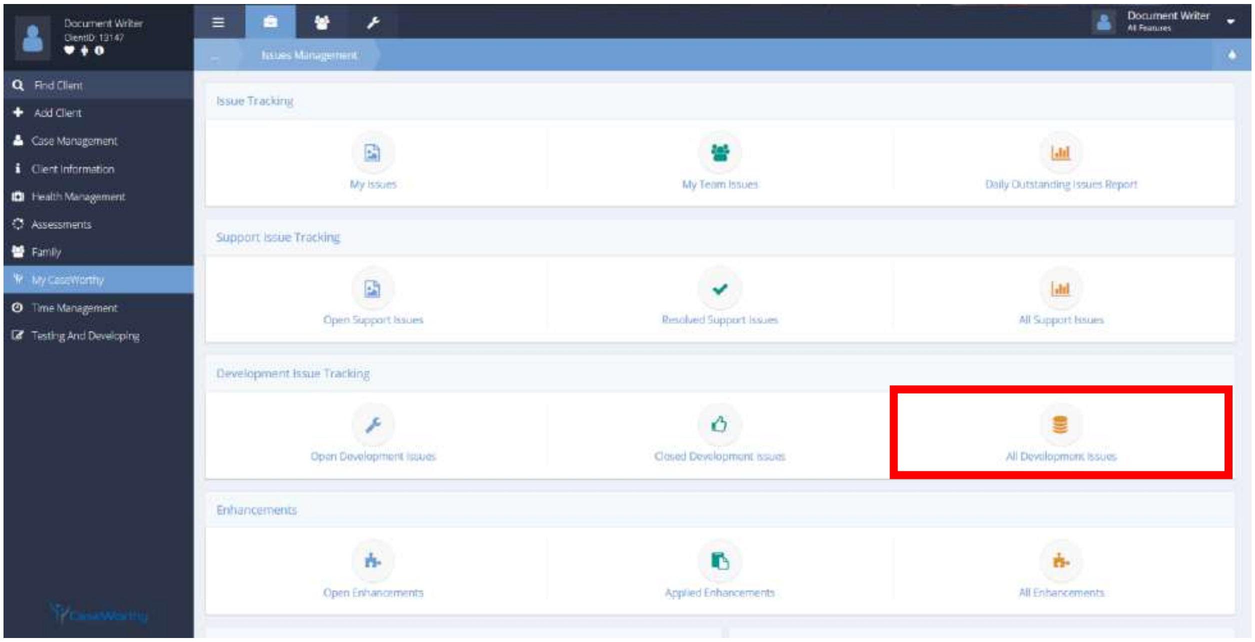


Issue ID	Customer	Priority	Subject	Issue Date	Next Action Date	Issue Age Days	Subject	Fix Type	Initiator
307	CaseWorthy Dev	Low	test	7/1/2016	7/11/2016	-10	test	Both Code and Form	1327
292		Low		12/15/2015	7/11/2016	-10		Both Code and Form	2109
260		Low		8/18/2015	7/1/2016	53		Both Code and Form	2109

Click the action gear icon associated with the desired issue to View Action/Resolution Details, View Documents, or Delete. Click the Done button when finished.

Objective: View all development issues.

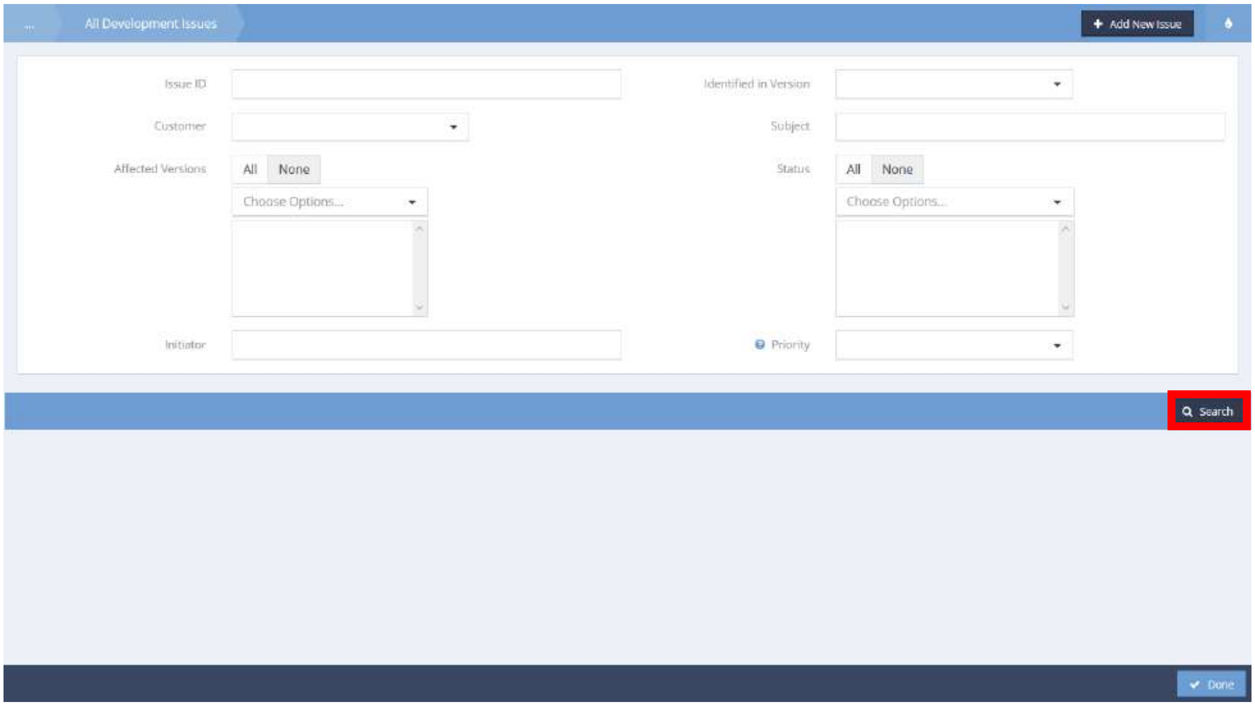
Navigation: Case Management>My CaseWorthy>Issues Management



Select All Development Issues from the Development Issue Tracking portion of the Issues Management dashboard.

The All Development Issues form displays all issues (open or closed) related to current (at the time of the issue) development.

All Development Issues (9003)



Use the fields at the top of the form to filter results. Click the Search button to populate results. To add a new issue, click the Add New Issue button.

Issue ID	Customer	Subject	Issue Date	Next Action Date	Initiator	Priority	Status	Assigned To	Issue Age In Days
320	CaseWorthy Dev	test Subject 2	8/12/2016	8/22/2016	One, Jane	Low	Assigned	One, Jane	1
319	CaseWorthy Dev	Subject3	8/10/2016	8/20/2016	One, Jane	Low	Assigned	Tjoe, Jane	3
318	CaseWorthy Dev	Subject 2	8/10/2016	8/20/2016	One, Jane	Low	Assigned	Tjoe, Jane	3
317	CaseWorthy Dev	Test One Subject	8/10/2016	8/22/2016	One, Jane	Low	Assigned	One, Jane	1
316	CaseWorthy Dev	test Jane	8/10/2016	8/20/2016	Binks, Brody	Low	Assigned	Tjoe, Jane	3
315	CaseWorthy Dev	Test Test 1	8/9/2016	8/19/2016	One, Jane	Low	Assigned	One, Jane	4
314	CaseWorthy Dev	iuh	8/6/2016	8/16/2016	One, Jane	Low	Assigned	Tjoe, Jane	7
313	CaseWorthy Dev	yang	8/5/2016	8/15/2016	Tjoe, Jane	Low	Assigned	Tjoe, Jane	8

Click the action gear icon associated with the desired issue to View Action/Resolution Details, View Documents, or delete. Click the Done button when finished.

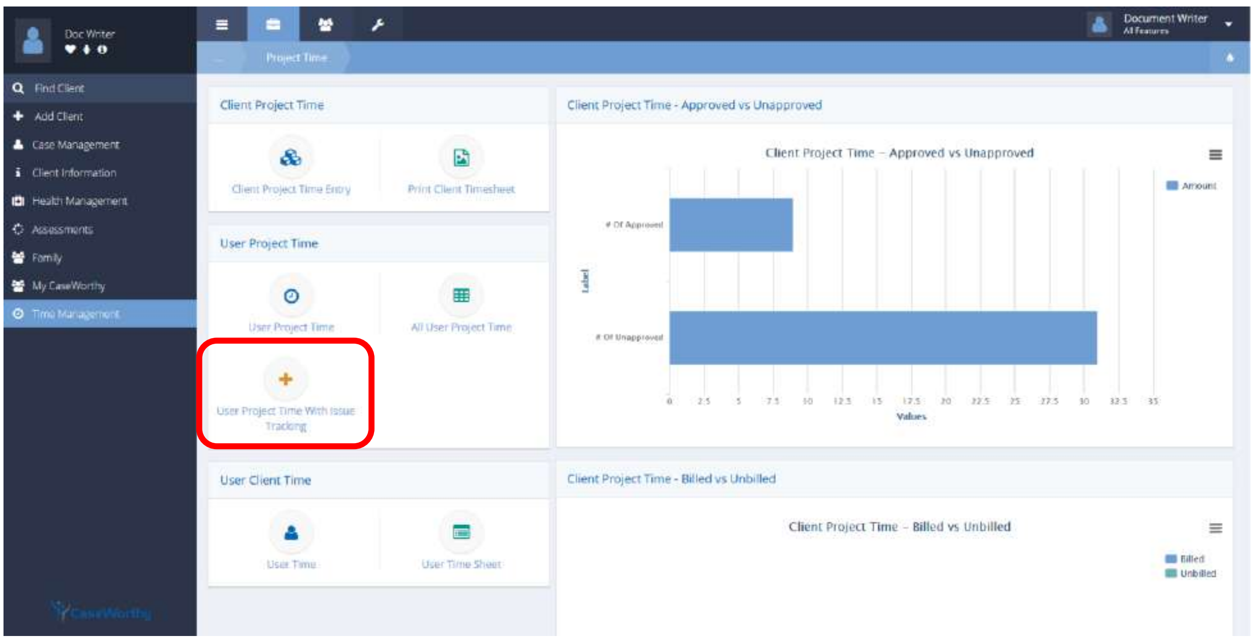
Time Management

Project Time

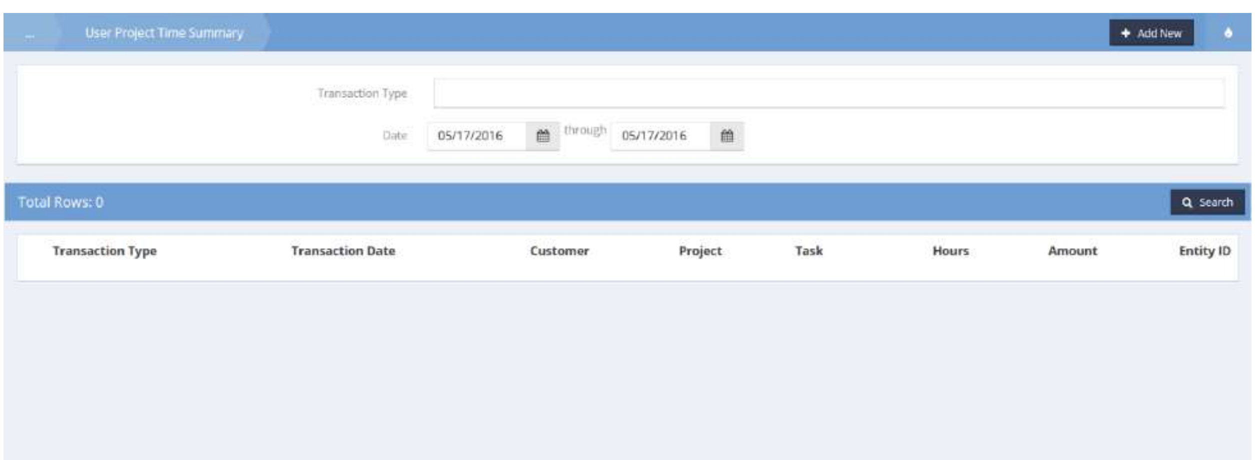
User Project Time with Issue Tracking

Objective: Track user time spent on issues.

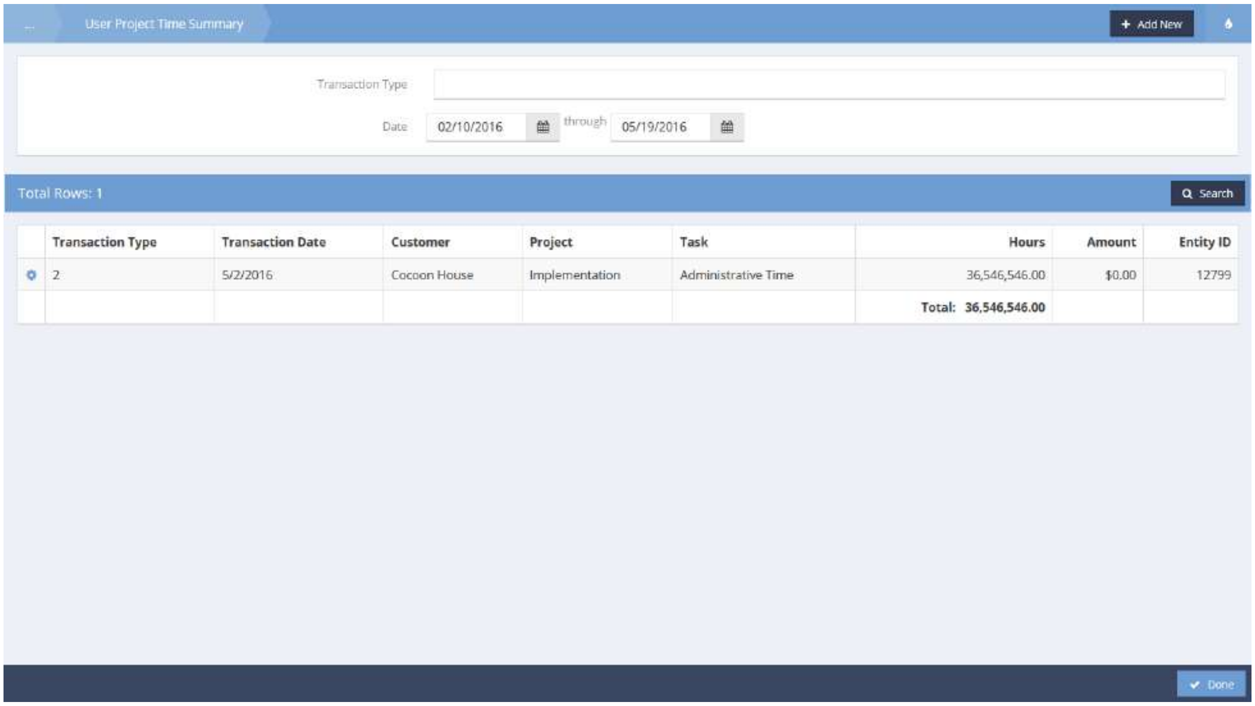
Navigation: Case Management>Time Management>Project Time



Select User Project Time With Issue Tracking from the User Project Time portion of the Project Time dashboard. The User Project Time Summary form displays.



Enter a date range and click the Search button to populate results for the selected time period.

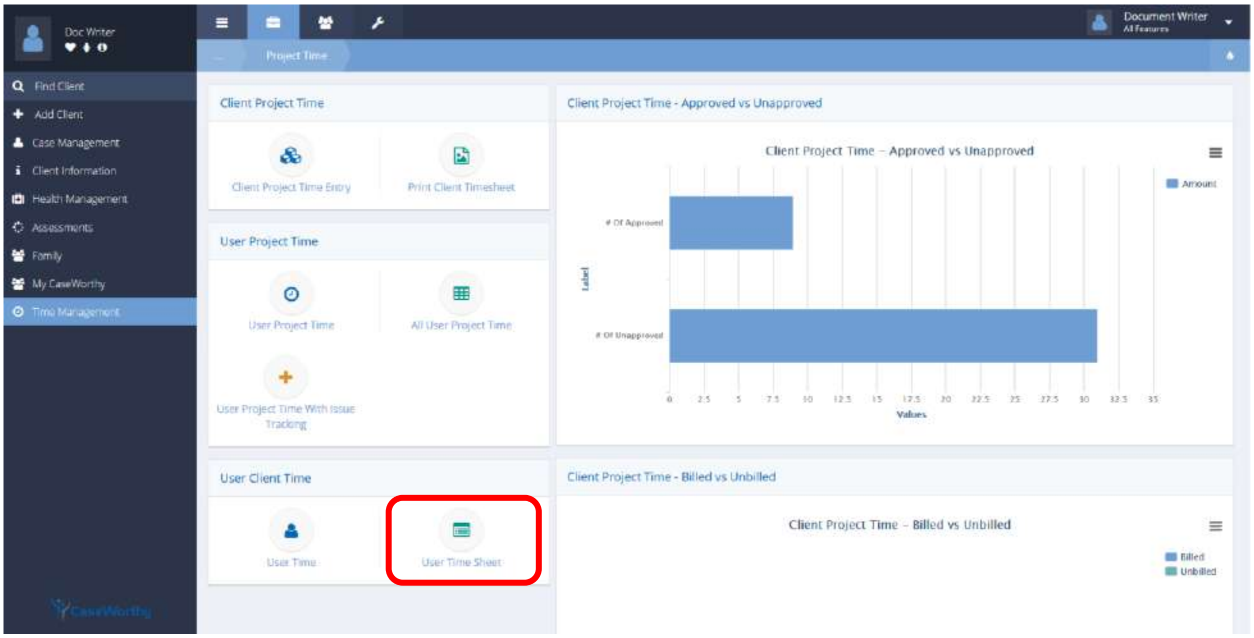


To edit or delete a transaction, click the action gear icon associated with the desired transaction and select the appropriate menu item. To add a new transaction, click the add new button. Click the Done button when finished.

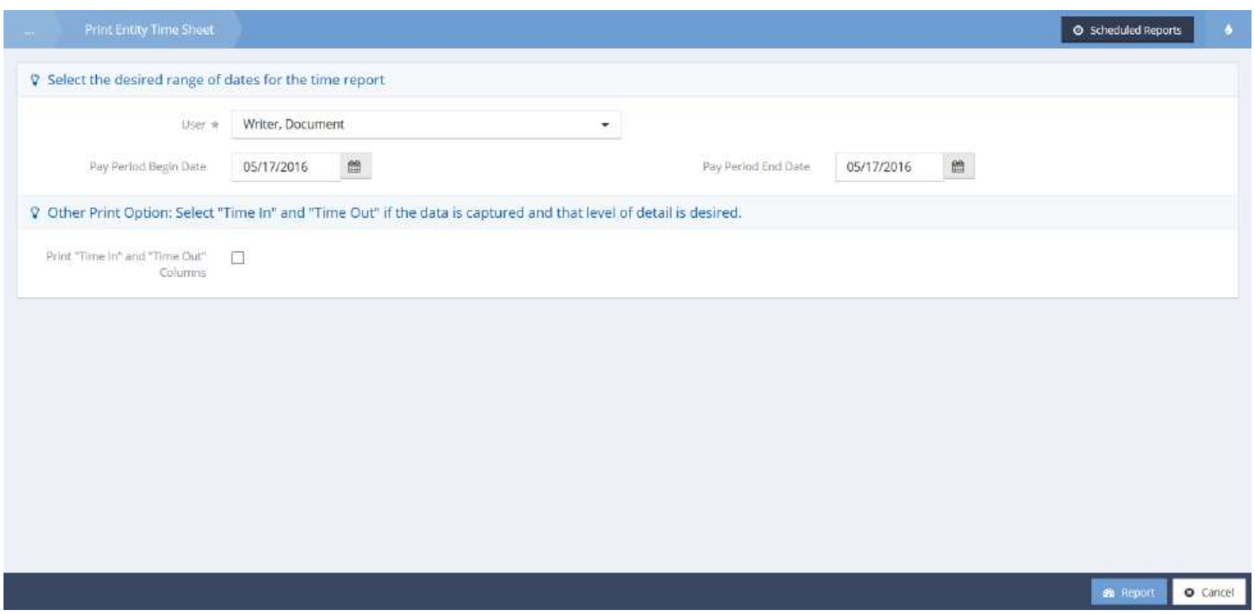
User Time Sheet

Objective: Print user time sheet.

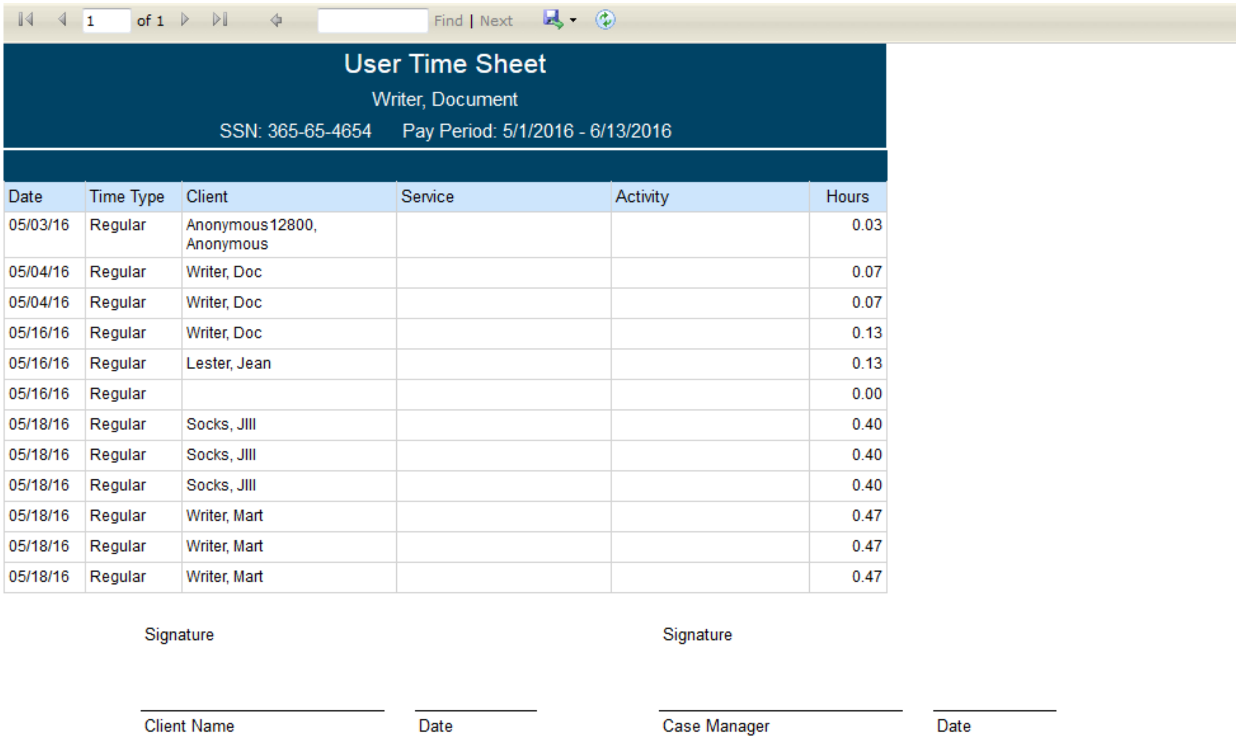
Navigation: Case Management>Time Management>Project Time



Select User Time Sheet from the User Client Time portion of the Project Time dashboard. The Print Entity Time Sheet form displays.



The User defaults. Enter a date range and check all relevant fields. To view or create scheduled reports, click the Scheduled Reports button. Click the Report button to view and print reports. The report displays in a new pop-up window.



1 of 1 Find | Next

User Time Sheet
Writer, Document
SSN: 365-65-4654 Pay Period: 5/1/2016 - 6/13/2016

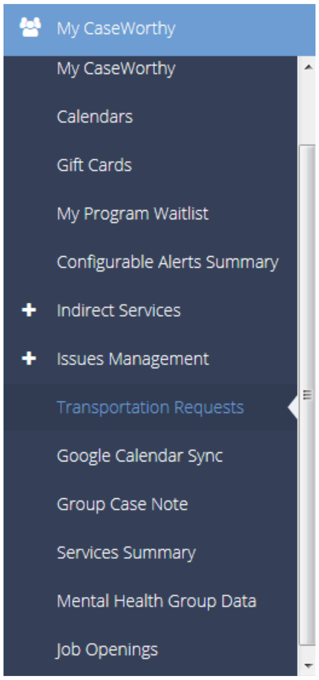
Date	Time Type	Client	Service	Activity	Hours
05/03/16	Regular	Anonymous12800, Anonymous			0.03
05/04/16	Regular	Writer, Doc			0.07
05/04/16	Regular	Writer, Doc			0.07
05/16/16	Regular	Writer, Doc			0.13
05/16/16	Regular	Lester, Jean			0.13
05/16/16	Regular				0.00
05/18/16	Regular	Socks, JIll			0.40
05/18/16	Regular	Socks, JIll			0.40
05/18/16	Regular	Socks, JIll			0.40
05/18/16	Regular	Writer, Mart			0.47
05/18/16	Regular	Writer, Mart			0.47
05/18/16	Regular	Writer, Mart			0.47

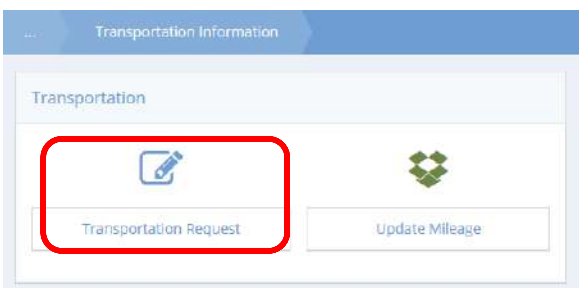
Signature Signature

Client Name Date Case Manager Date

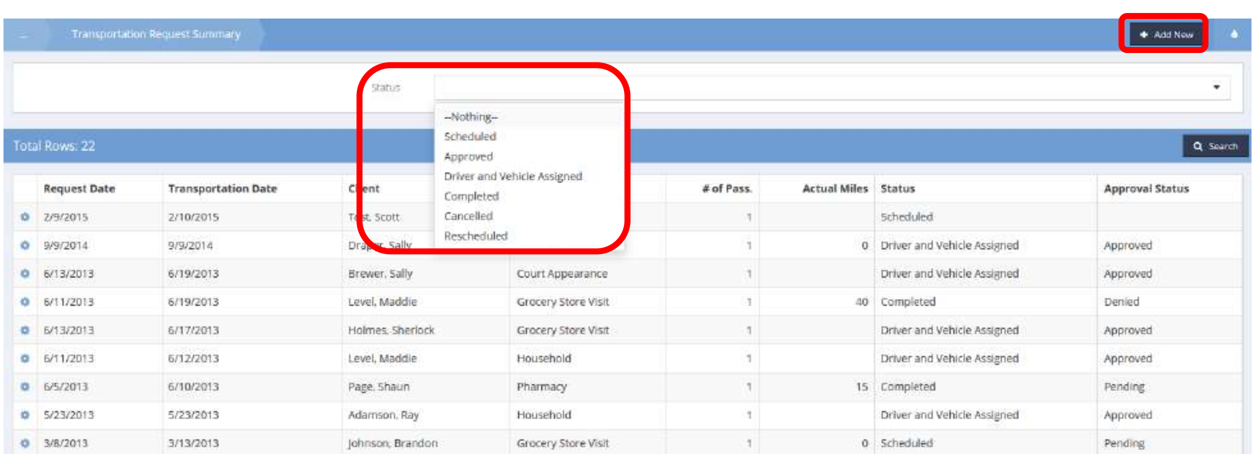
Print according to computer settings.

Transportation Requests





The Transportation Request functionality allows documentation of agency offered transportation services. The Transportation Request Summary sheet provides the capability to filter the list by Status.

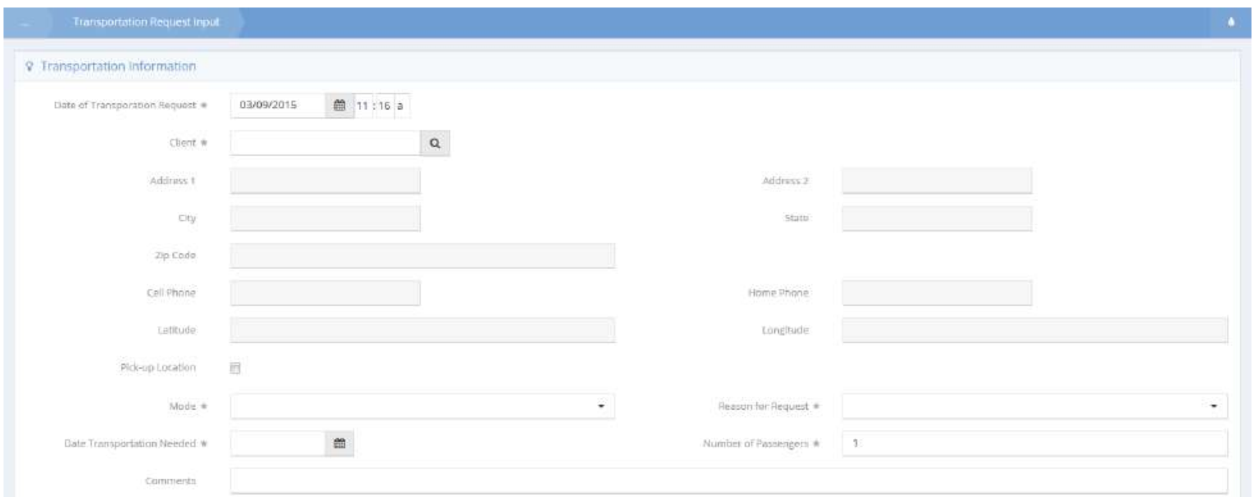


Completed transportation requests include scheduling, approval and driver assignment.

To add a new transportation request, select the **+ Add New** button. The form has three main section which must all be filled out.

The first section is Transportation Information. Once a client is selected, the address fields for that client are automatically filled. If the pick-up location is the client's address, select the Pick-up Location checkbox. Select mode of transportation, round trip, one way, or multiple destinations, from the drop-down box.

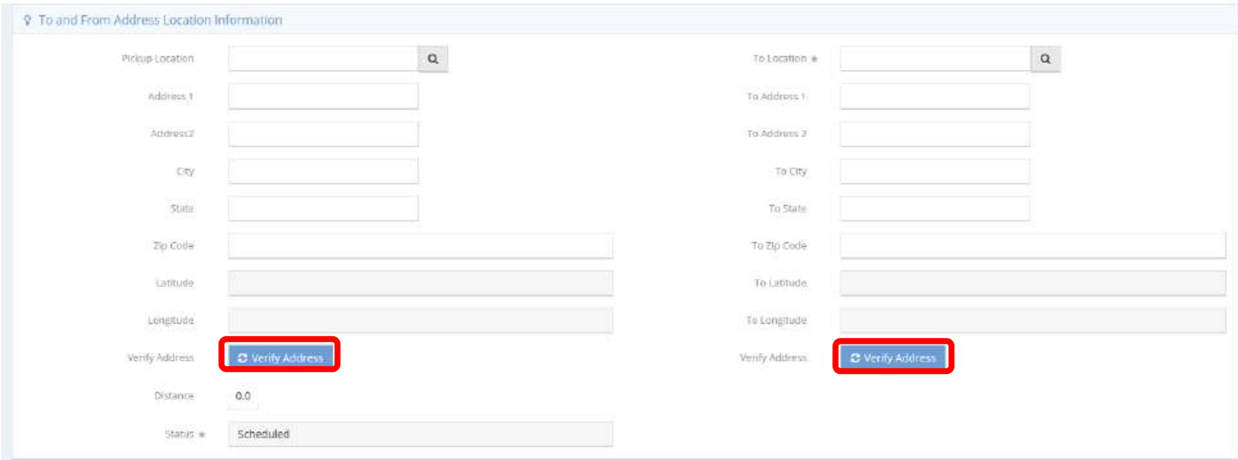
The date transportation is needed, the reason for the request and the number of passengers needing transportation are required fields. Additional comments may be included in the comment box if needed.



The Program and Service to be attached to the transportation request are chosen in the second section by selecting each from drop-down lists.

The last section of the form is the To and From Address Location Information. If the Pick-up Location checkbox was selected earlier, that information appears automatically in this section. If not, the address is to be entered in this section along with the address of the destination. Click **Verify Address** to verify.

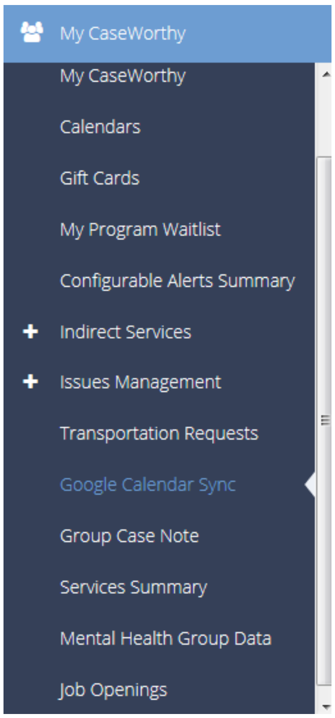
Once verified, the calculated total travel distance between the two locations is provided.

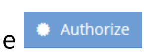


After the form is completed, click the Save button.

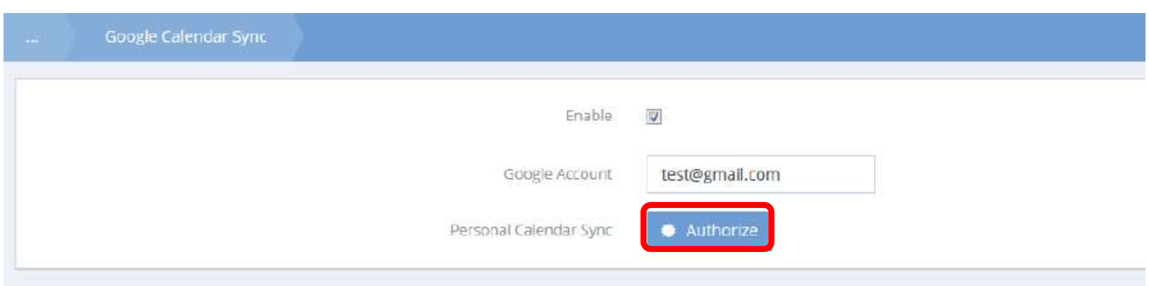
Google Calendar Sync

Objective: Set up user's CaseWorthy™ calendar to synchronize with Outlook calendar and Google calendar.

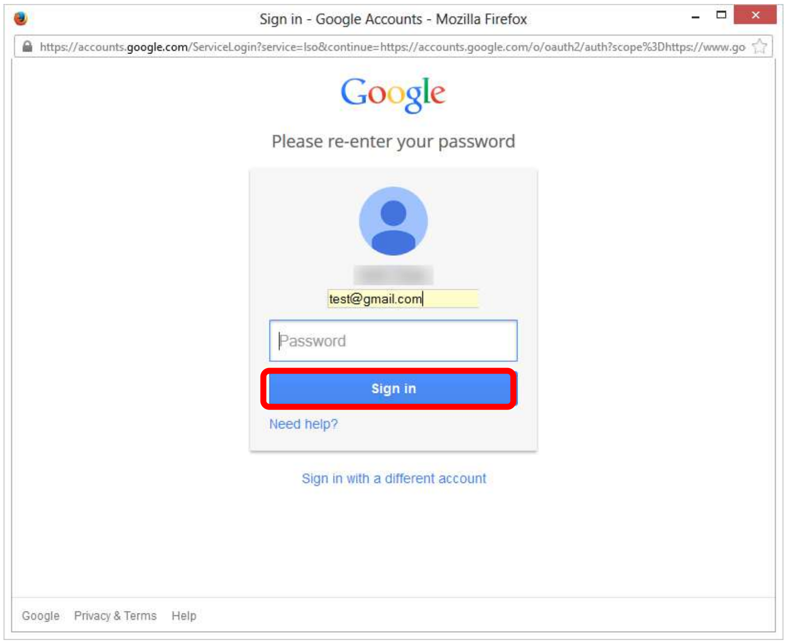


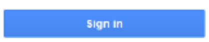
Click the Enable check box and enter the desired Gmail account name. Click the 

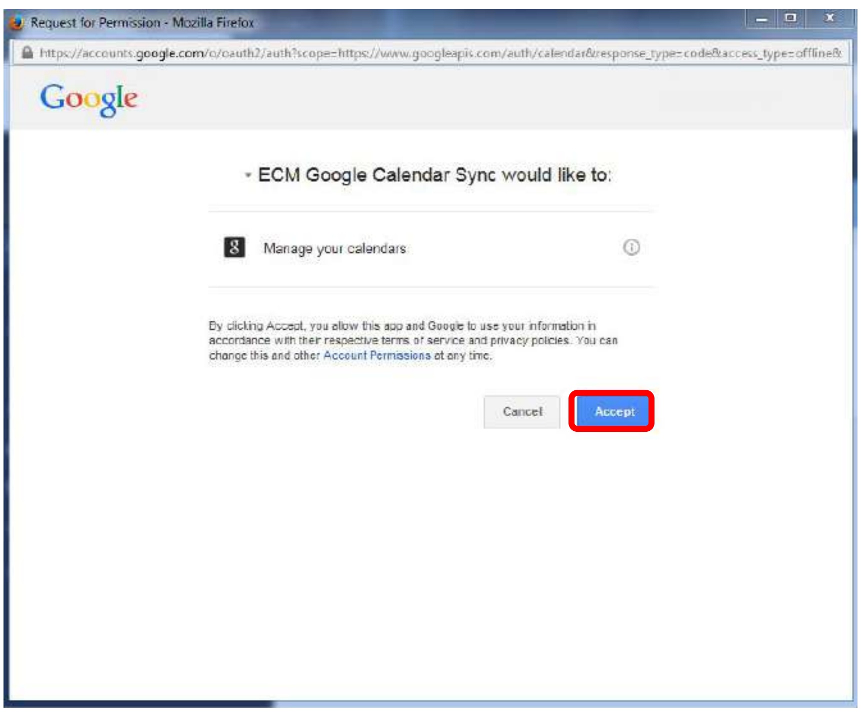
button.

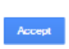


A separate Google Sign-in window displays.

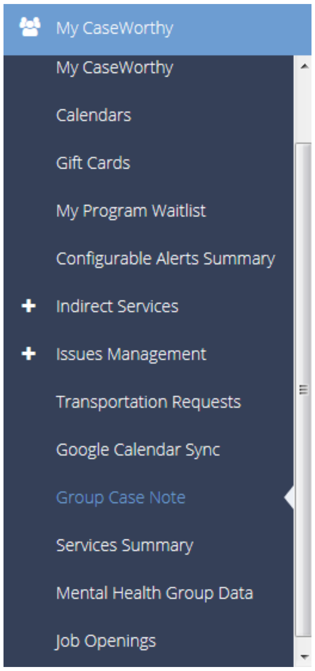


Enter the Gmail password and click the  button.



Click the  button.

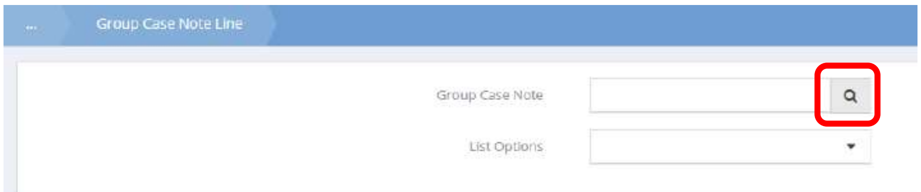
Group Case Note



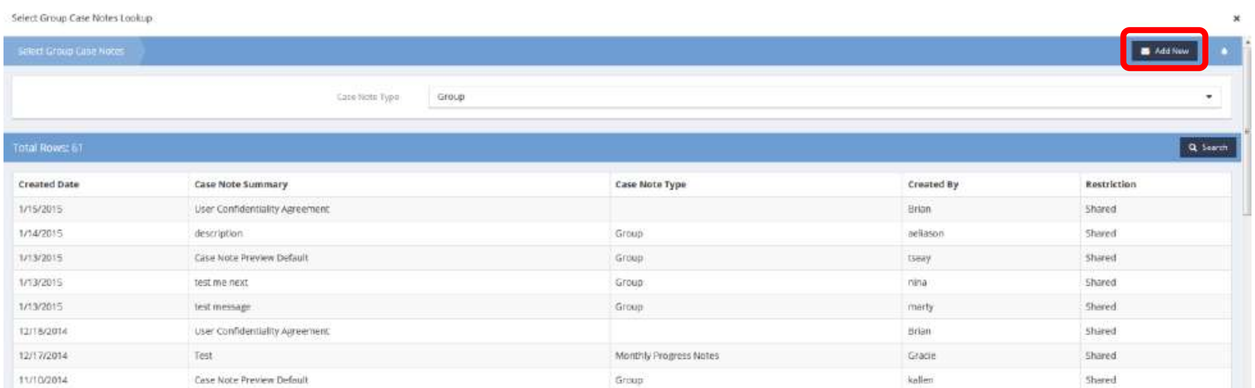
In Group Case Notes, case notes can be created and then posted to multiple clients' records.

Group Case Notes is a two-step process; case note creation and assignment. Upon saving, the system posts the case note to each client record. Both steps can be achieved by selecting the Post Group Note to Multiple Clients in the Group Case Notes dashboard.

To begin, select or create a case note by selecting the magnifying glass icon next to the Group Case Note box on the Group Case Note Header screen.

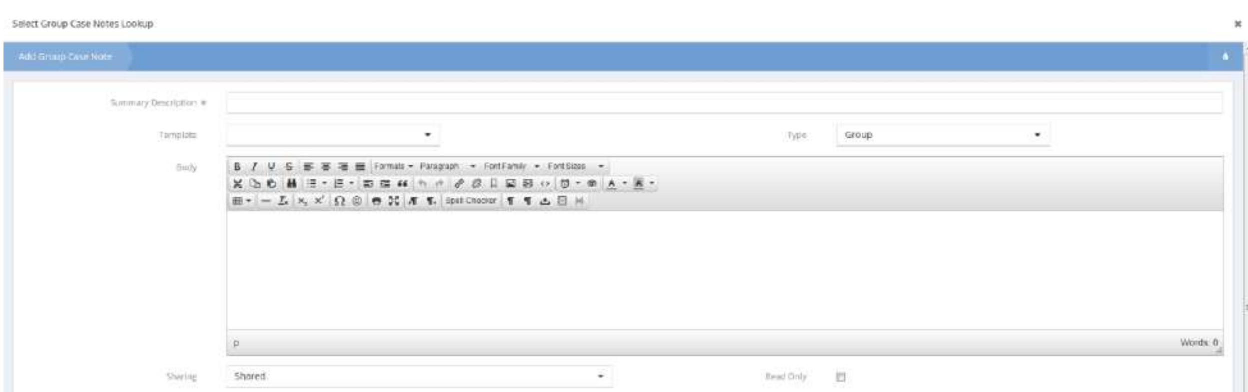


A list of all previously created group case notes displays. If present, select the desired case note, if not, begin the process of creating the new case note by selecting the Add New button.



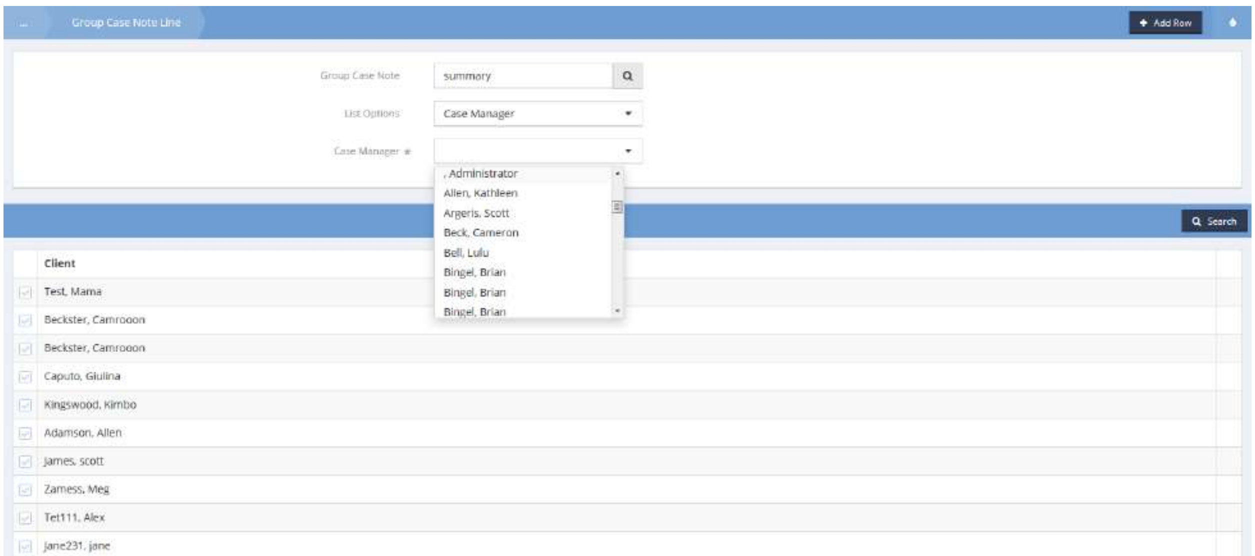
On the Add New screen, enter a description of the new group case note. If a template has already been set up for this case note, it can be selected here, if not, the note can be keyed in.

NOTE: ***For a case note to appear up on the Group Case Note page, the 'Type' must be set to 'Group'. This automatically adds the new group case note to the Group Case Note list when saved.***

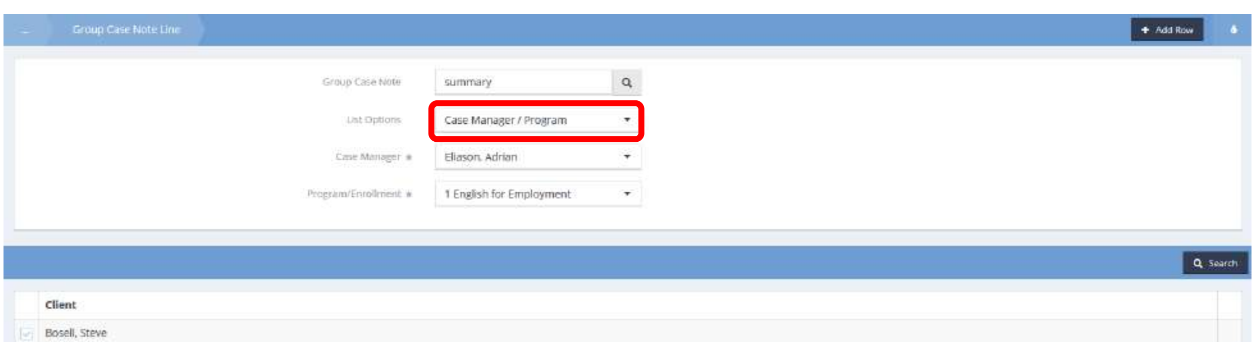


After creating the group case note (or selecting an existing case note), select the clients to whom the case note should post. There are several different ways to narrow down the list of clients: by Case Manager, by Program within Case Manager, by Program, or by Usage within Resource.

The first option in the dropdown list is by Case Manager. When selected, the list of clients assigned displays. Selecting a case manager further narrows the list. Only clients assigned to the specified case manager appear.

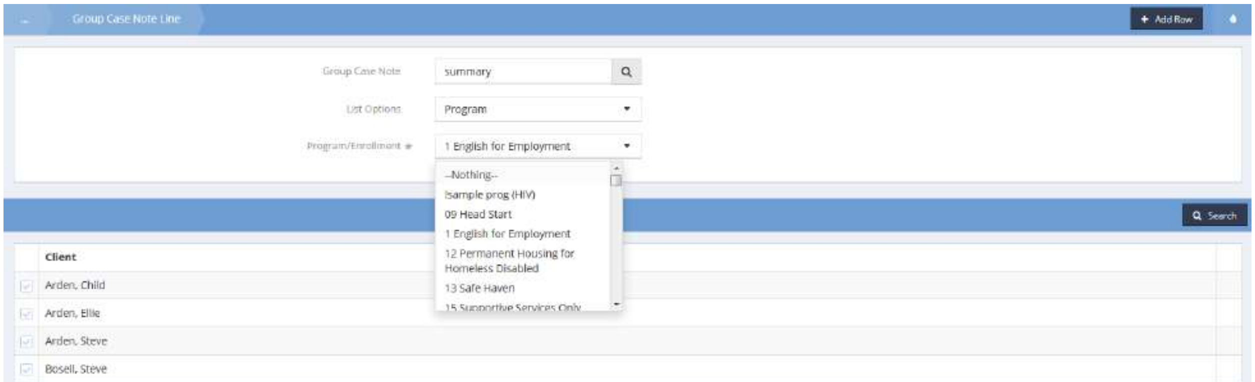


To display a list of clients by program within case manager, select the second option in the List Options field, Case Manager/Program. Select the desired case manager from the Case Manager drop-down list and the desired program from the Program/Enrollment drop-down list. The displayed list only shows clients meeting both requirements.

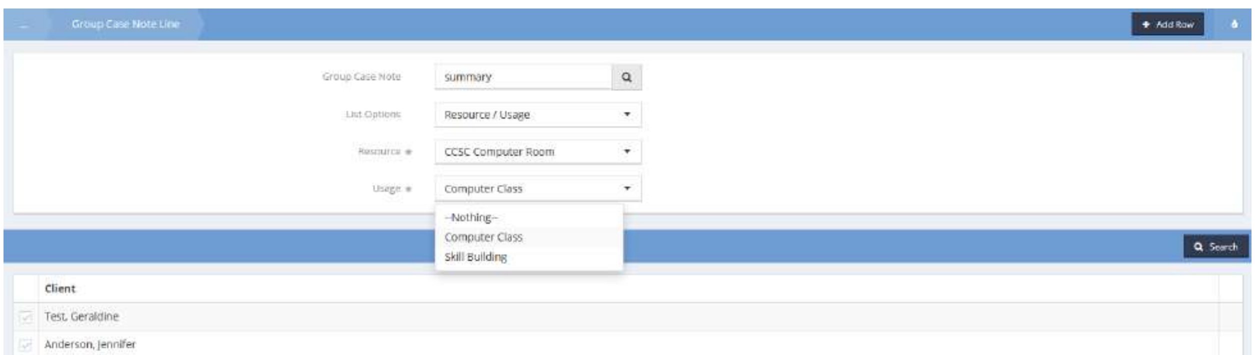


The third option in the List Options drop-down list is Program.

When selected in conjunction with the desired program from the Program/Enrollment list, a list of clients enrolled in the specified program displays.



The fourth and final option on the List Options drop-down list is Resource/Usage. When selected along with the desired resource from the Resource drop-down list and the desired usage from the Usage drop-down list, the list of clients meeting those criteria displays.

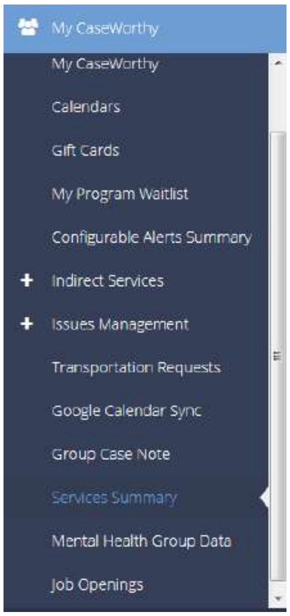


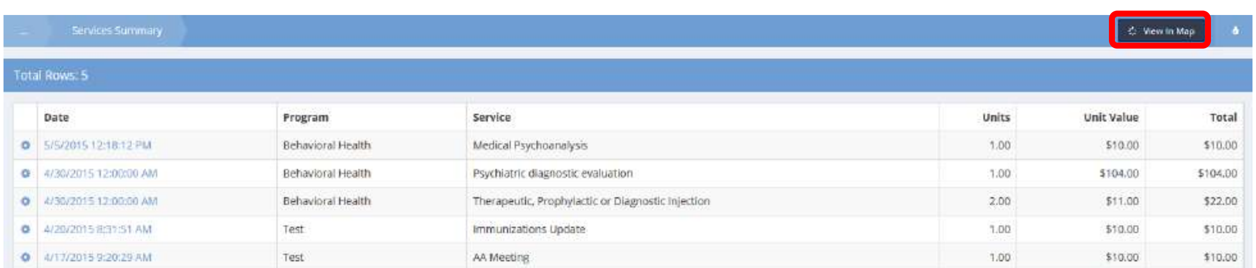
Regardless of the method chosen to create a client list, select the clear checkbox next to the client name to add them to the list of clients for the group case note. After selecting all desired clients, click 

and the group case note is automatically recorded under each of the selected clients.

Services Summary

Objective: View all services, locate service providers on a map, add and edit services including diagnoses codes.



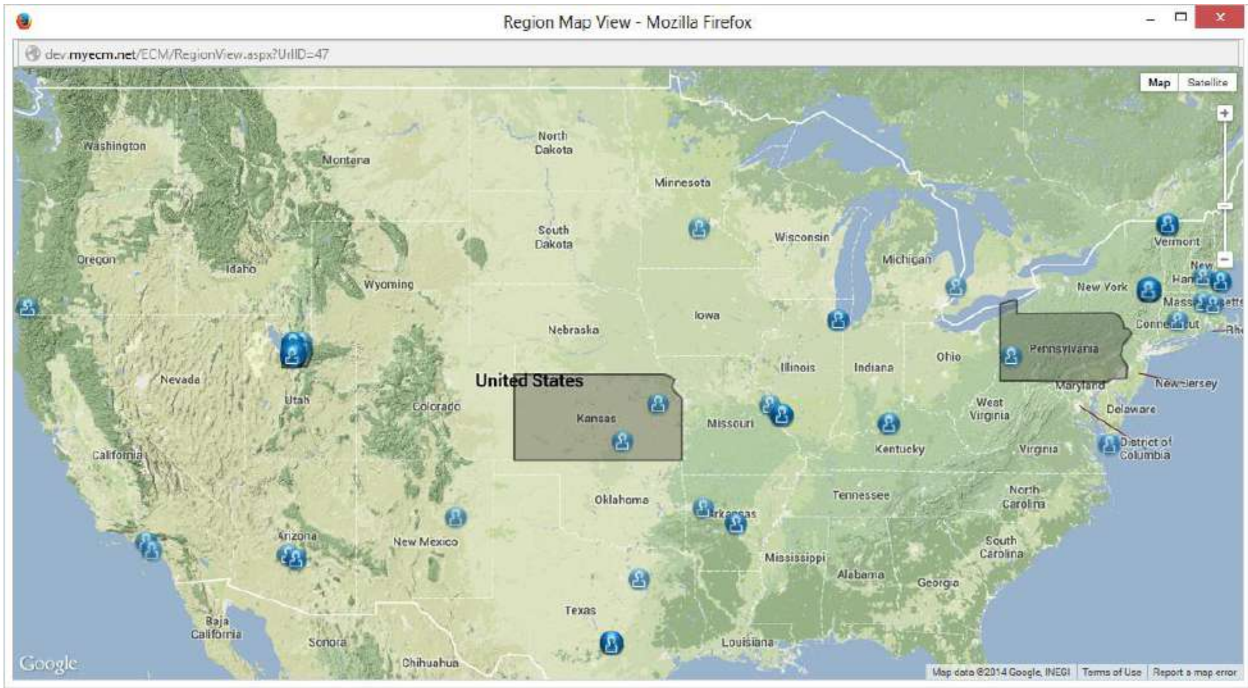


Date	Program	Service	Units	Unit Value	Total
5/5/2015 12:18:12 PM	Behavioral Health	Medical Psychoanalysis	1.00	$10.00	$10.00
4/30/2015 12:00:00 AM	Behavioral Health	Psychiatric diagnostic evaluation	1.00	$104.00	$104.00
4/30/2015 12:00:00 AM	Behavioral Health	Therapeutic, Prophylactic or Diagnostic Injection	2.00	$11.00	$22.00
4/20/2015 8:31:51 AM	Test	Immunizations Update	1.00	$10.00	$10.00
4/17/2015 9:20:29 AM	Test	AA Meeting	1.00	$10.00	$10.00

The Services Summary form displays a list of services rendered. To view the list in map form, click on the 

button.

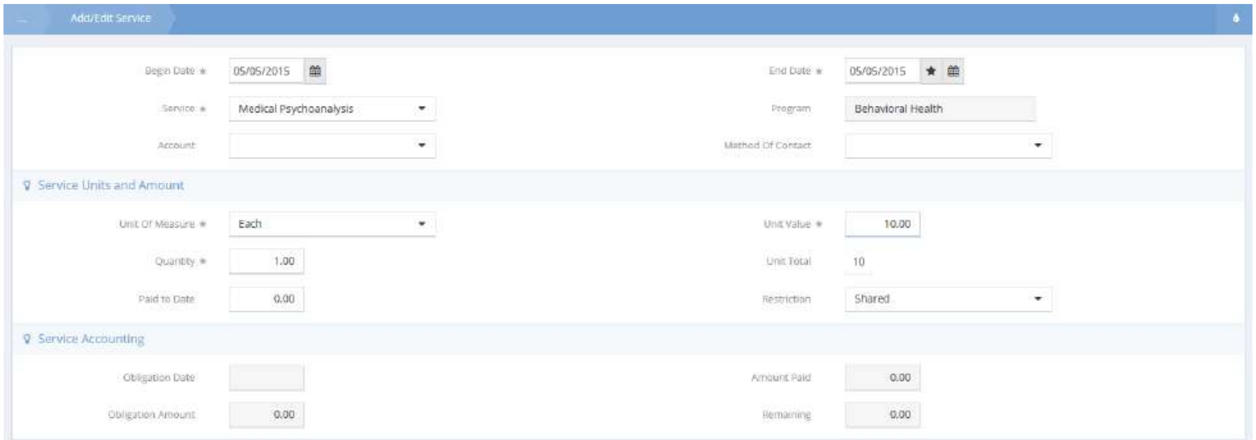
The map opens in a new window.



Map functionality includes zoom and pan and pop up labels.

To edit a service, click on the action gear icon associated with the desired service. Select Edit Service from the pop up menu that appears.

The Add / Edit Service form displays.



Make any desired changes and click on the 

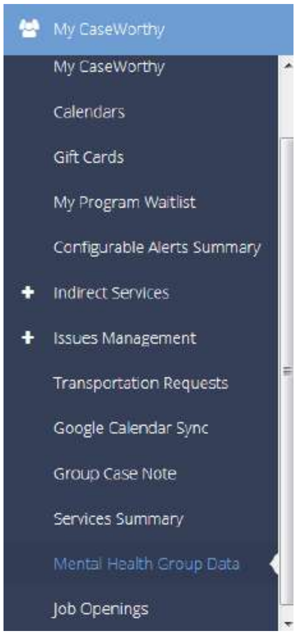
button.

To view the account transaction information, click on the action gear  icon associated with the desired service and select View Account Transaction from the pop up menu that appears.

The View Transaction History form displays.

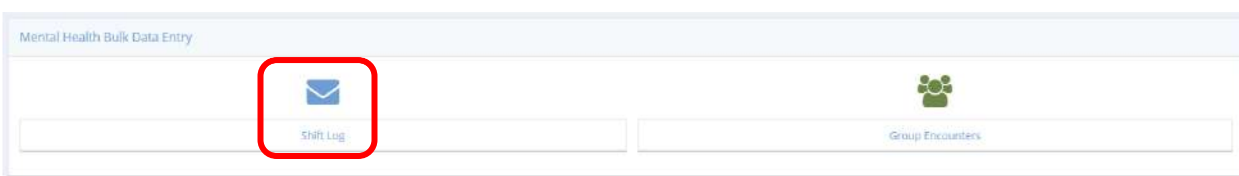
Mental Health Group Data

Objective: View the shift log and group encounters summary of mental health group.

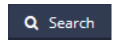


Shift Log

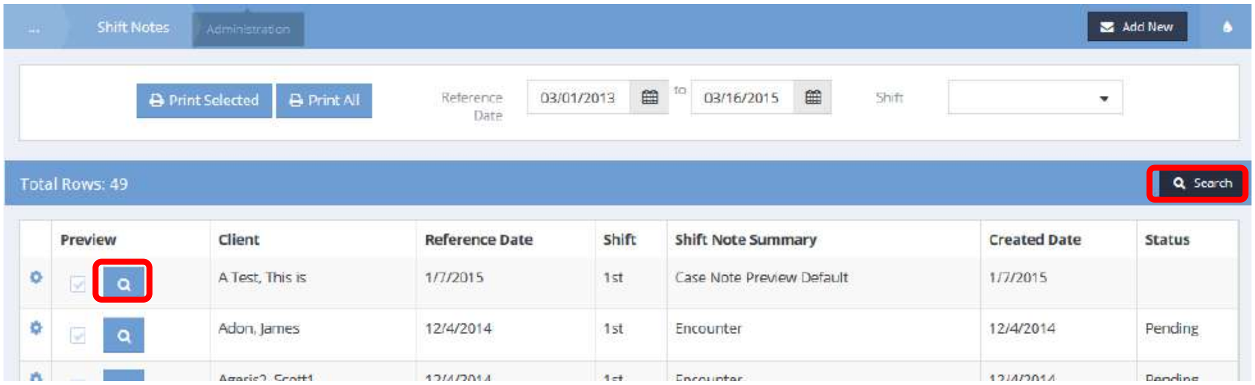
From the Mental Health Group Data dashboard, click on the Shift Log icon on the Mental Health Bulk Data Entry menu.



The Shift Notes form displays.

Enter any desired date range and shift information and click on the 

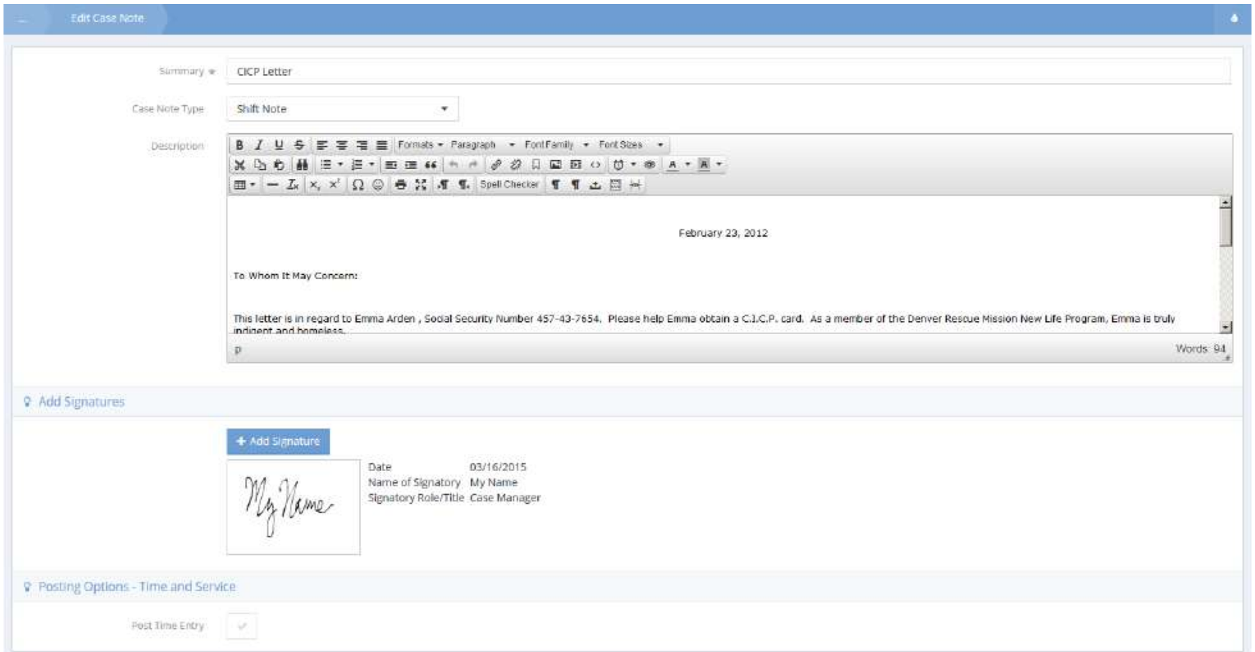
button to display the list.



To preview a shift note, click on the magnifying glass  icon. A new window opens with the preview.

To edit a shift note, click on the action gear  icon associated with it and select Edit from the pop up menu that appears.

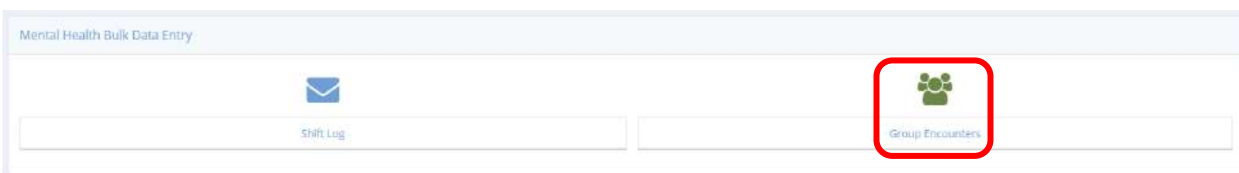
The Edit Case Note form appears.



Make any desired changes and click the Save button in the lower right corner of the form.

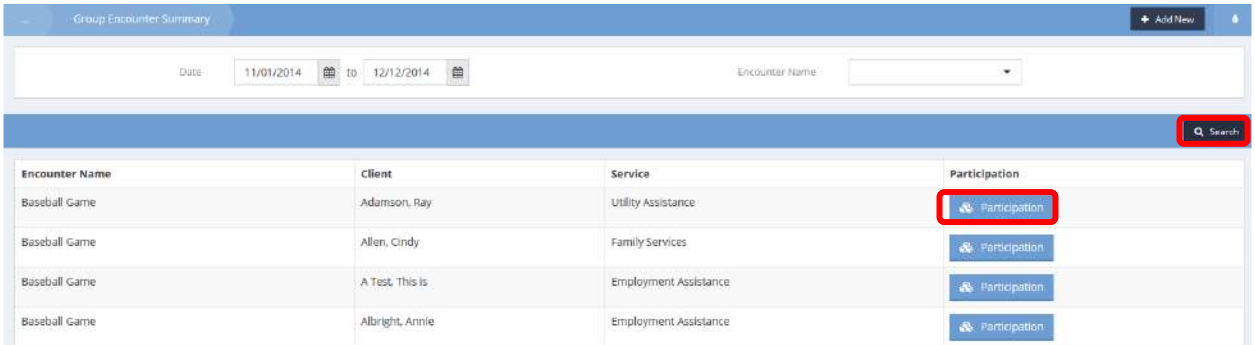
Note: ***The* Save *button only displays if the Shift Note was created by the current user and the shift note has not been set to "read only".***

Group Encounters

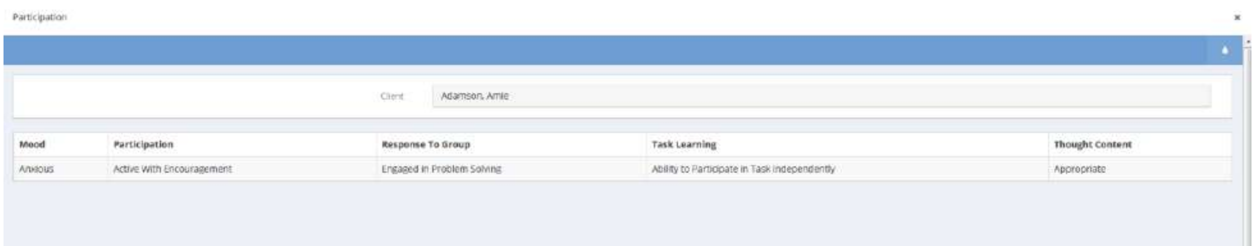


Click the Group Encounters icon on the Mental Health Bulk Data Entry menu.

The Group Encounter Summary form displays. Enter the desired date range and Encounter Name if desired and click on the Search button. The participant list appears.



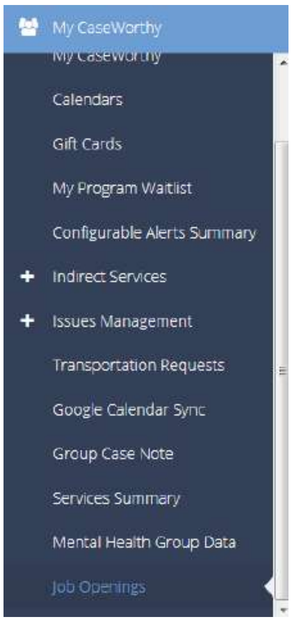
To view participation details, click the Participation button associated with the desired participant. The Group Encounter Participation form displays client specific information.

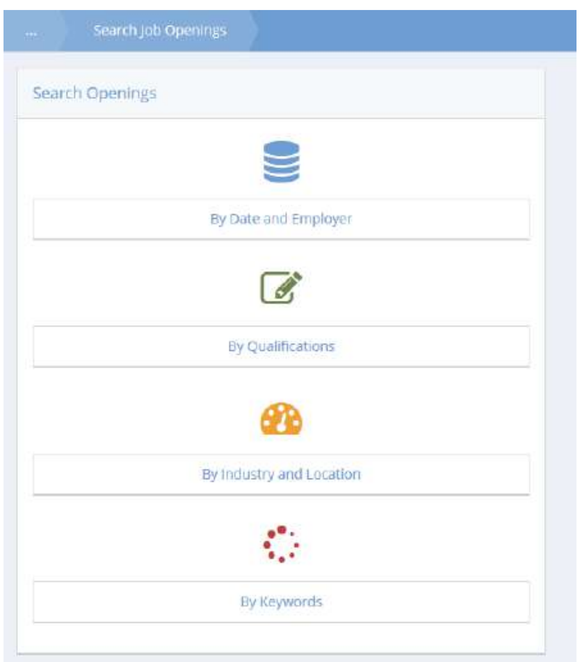


Job Openings

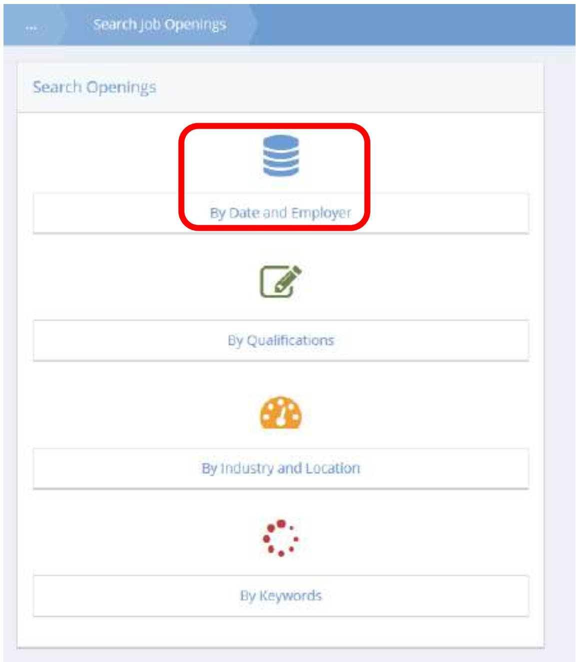
Job Opening Data Presentation

Objective: Access job opening information filtered by Employer, Date, Qualifications, Industry, Location or Keywords.

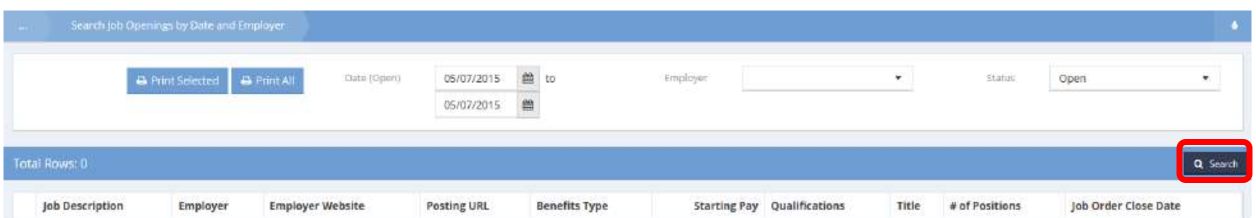


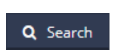


All Job Openings by Date and Employer

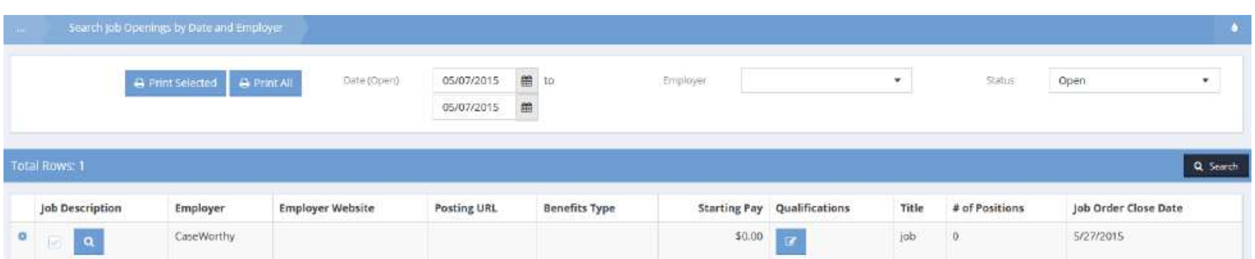


Select the “By Date and Employer” icon from the Search Openings menu. The Search Job Openings By Date and Employer form displays.

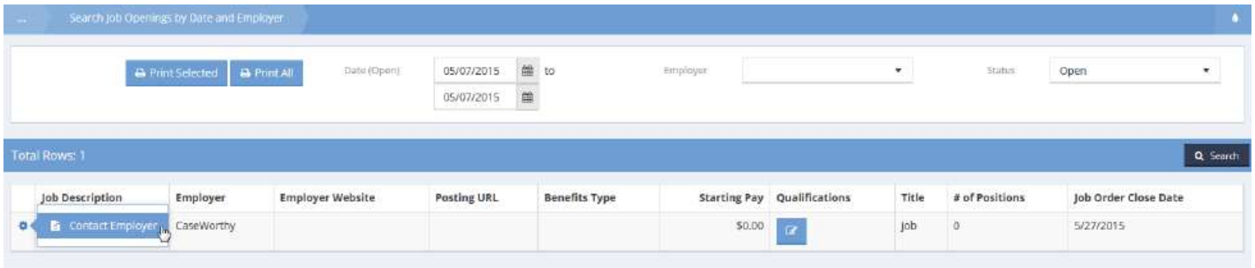


To see all job openings, click on the 

button. The resultant list is printable and filterable by date range, employer and status.



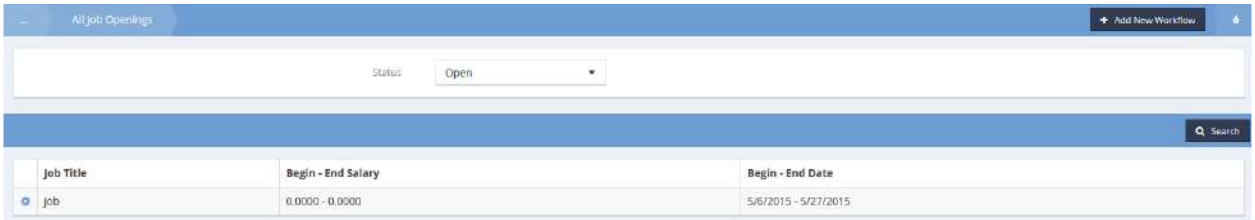
Print using the Print Selected button or the Print All button. Drill deeper into the data by clicking on the Qualifications icon or preview the print by clicking on the magnifying glass icon. Contact the employer by clicking on the action gear icon and selecting Contact Employer from the pop up menu that appears.



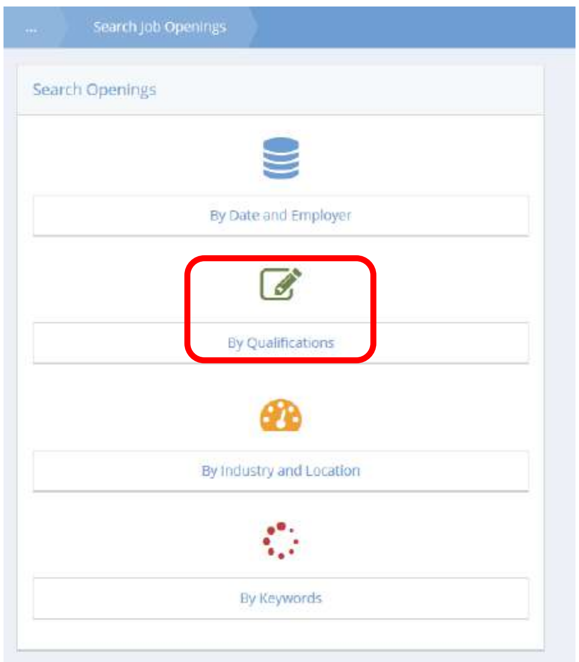
NOTE: ***Job openings by employer can also be accessed following the Organization>Providers>Employer path as shown below.***

Click on the action gear icon associated with the desired employer and select Job Opening from the pop up menu that appears.

The All Job Openings form displays a list all job openings for that employer.



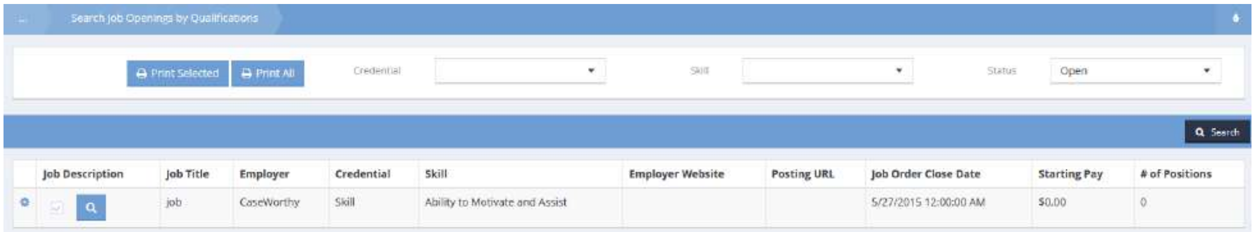
Search Job Openings by Qualifications



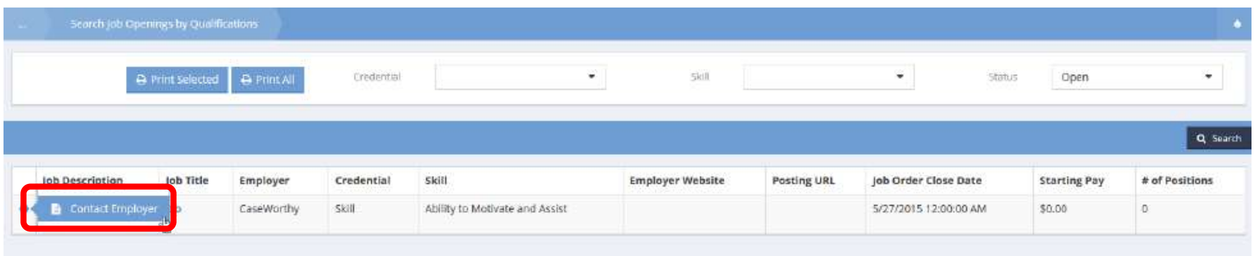
Select the “By Qualifications” icon from the Search Openings menu. The Search Job Openings By Qualifications form displays.

To see all job openings, click on the Search button.

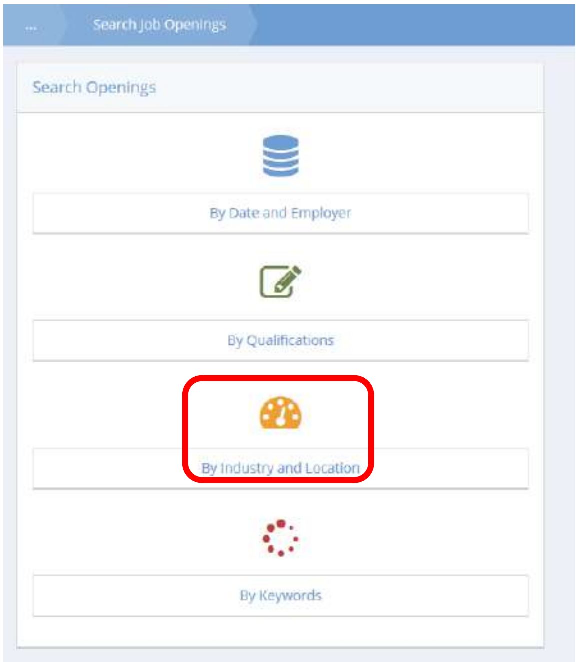
The resultant list is printable and filterable by credential, skill and status.



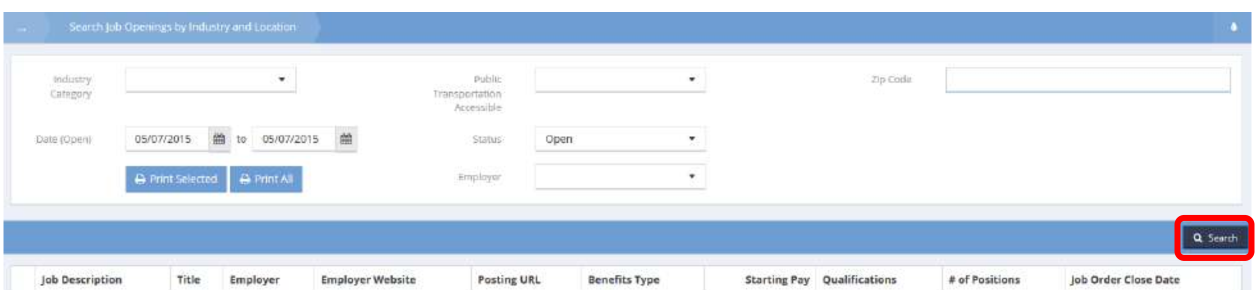
Print using the Print Selected button or the Print All button. Drill deeper into the data by clicking on the Qualifications icon or preview the print by clicking on the magnifying glass icon. Contact the employer by clicking on the action gear icon and selecting Contact Employer from the pop up menu that appears.



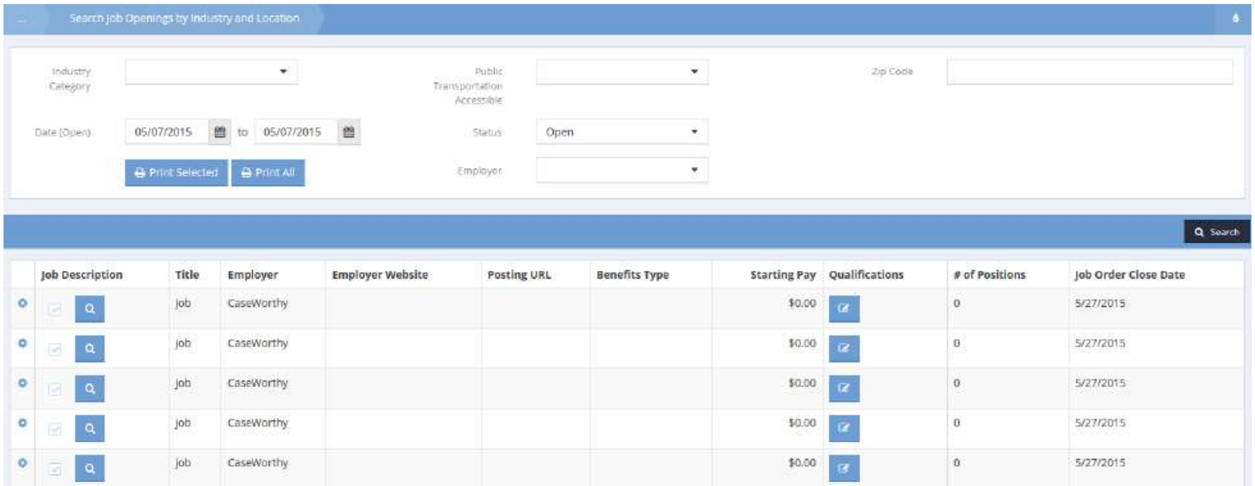
All Job Openings by Industry



Select the “By Industry and Location” icon from the Search Openings menu. The Search Job Openings By Industry and Location form displays.

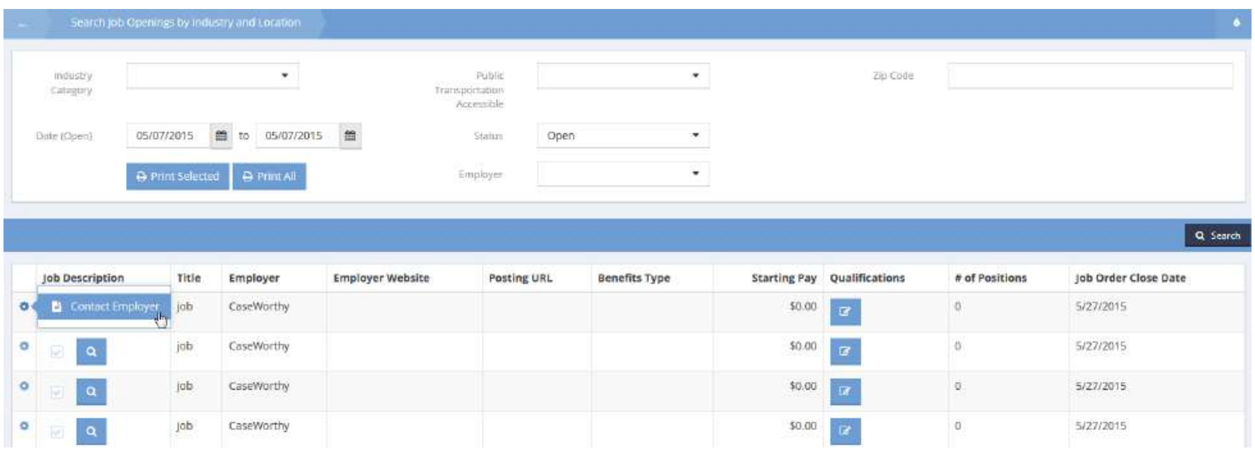


To see all job openings, click on the Search button. The resultant list is printable and filterable by industry category, public transportation accessibility, employer, date range zip code and status.

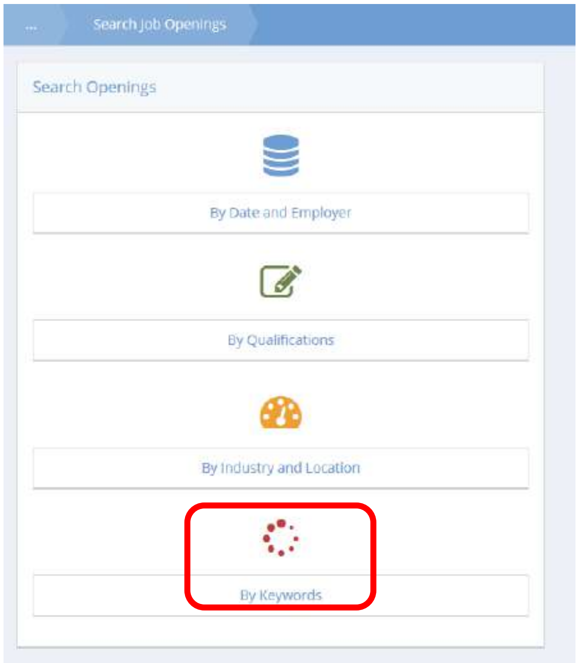


Print using the Print Selected button or the Print All button. Drill deeper into the data by clicking on the Qualifications icon or preview the print by clicking on the magnifying glass icon.

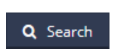
Contact the employer by clicking on the action gear icon and selecting Contact Employer from the pop up menu that appears.

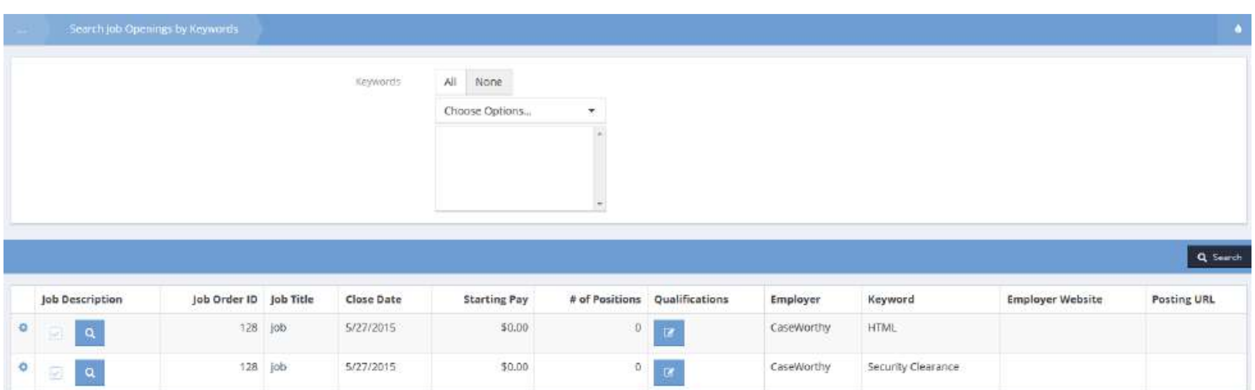


Job Orders by Keywords

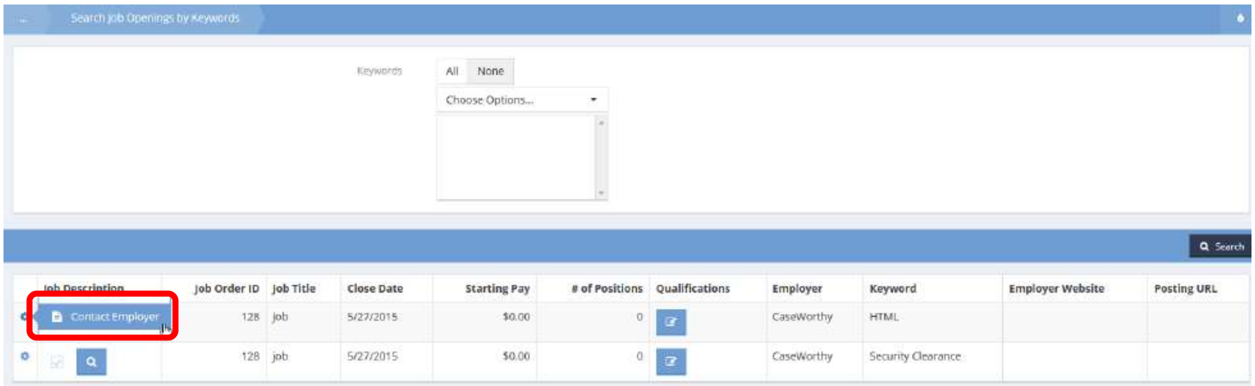


Select the “By Keywords” icon from the Search Openings menu. The Search Job Openings By Keywords form displays.

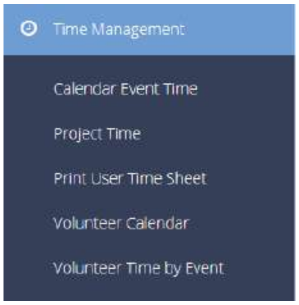
To see all job openings, click on the  button. The resultant list is printable and filterable keywords.



Drill deeper into the data by clicking on the Qualifications icon or preview the print by clicking on the magnifying glass icon. Contact the employer by clicking on the action gear icon and selecting Contact Employer from the pop up menu that appears.



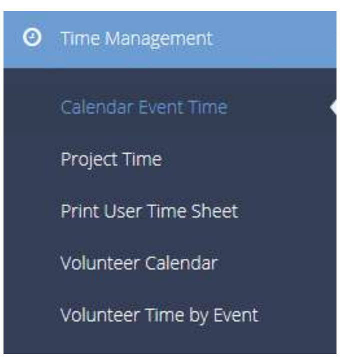
Time Management



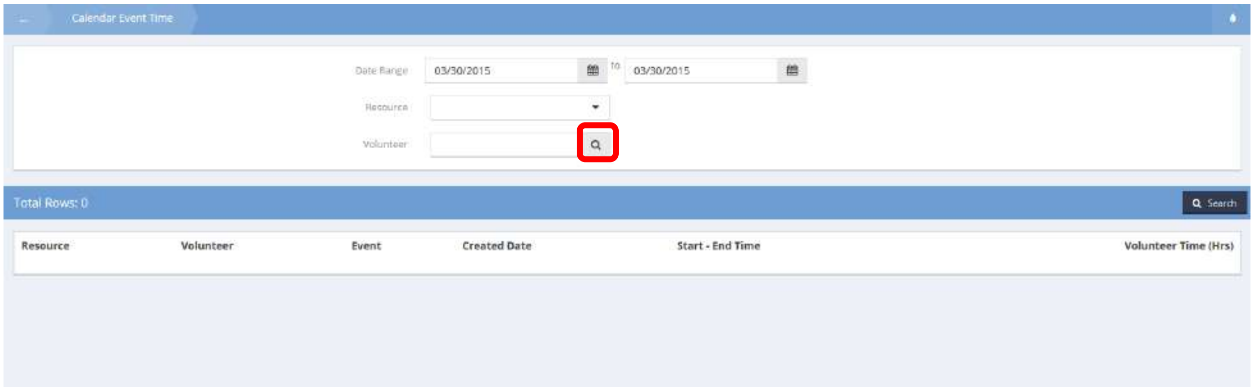
The Time Management menu contains forms that allow users to enter time against a customer project. The process includes referencing the work date, hours, pay type, customer, projects, project tasks and more. The overall approach includes entering weekly time based on a range of dates followed by a formal process to approve time.

Calendar Event Time

Objective: A searchable, editable view of volunteer calendar events filtered by date, event type and volunteer.



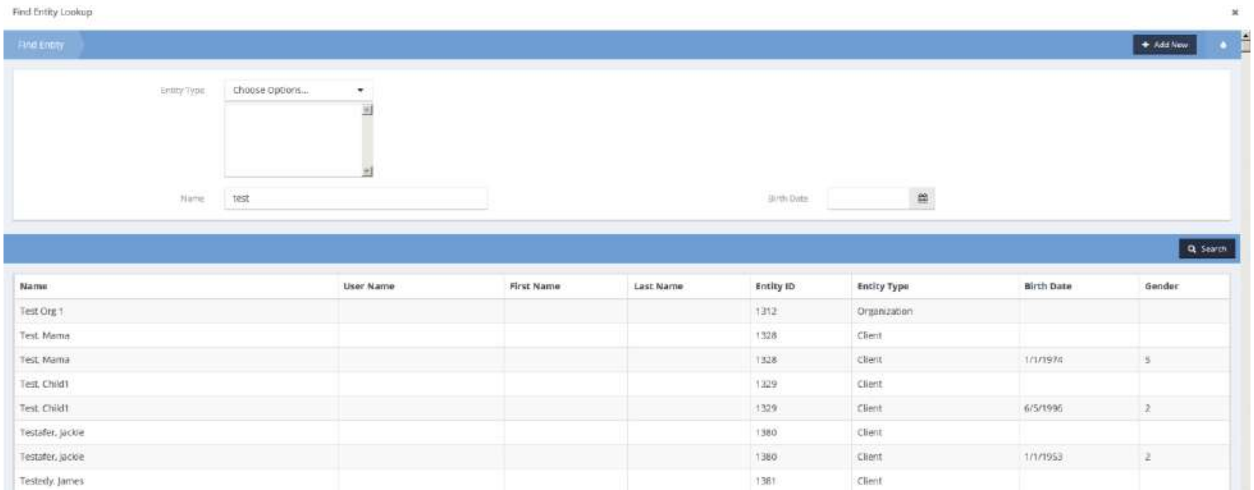
By clicking on the Calendar Event Time menu item, the Calendar Event Time form displays.



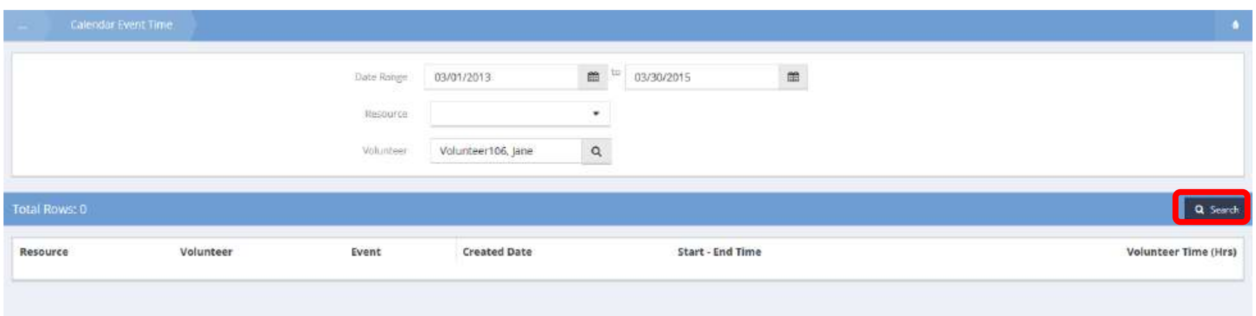
Click on the magnifying glass icon next to the Volunteer field. The Volunteer Lookup form displays.

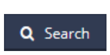
Enter any or all of the desired volunteer name and click on the Search button.

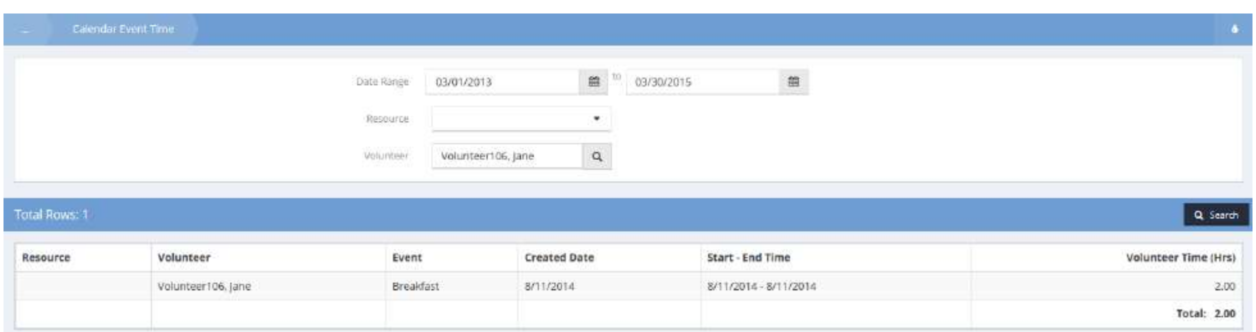
A list of matching volunteer names displays. Locate the desired name and click on it.



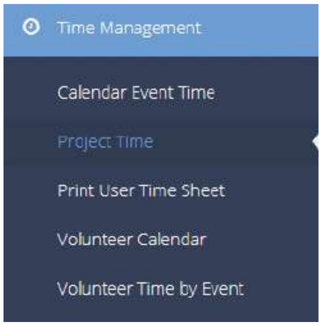
The user is returned to the Calendar Event Time form. Select a date range. Select a resource, if desired, from the drop-down list.

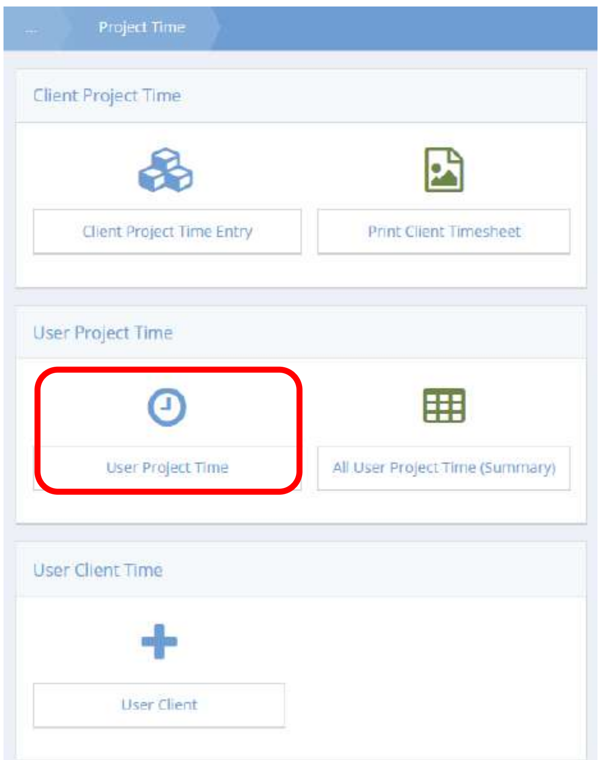


Click on the  button. The list of matching data displays



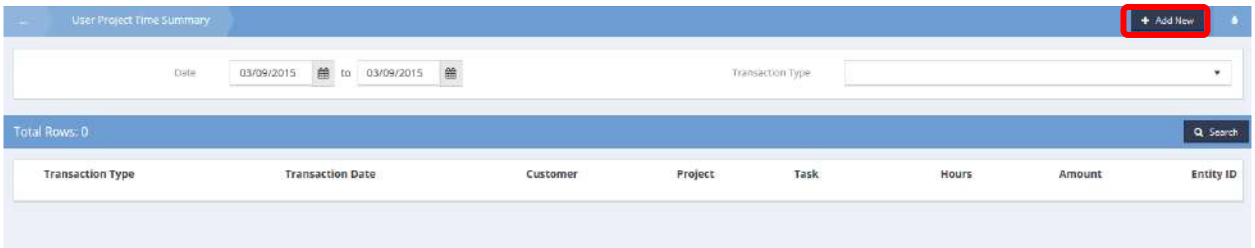
Project Time





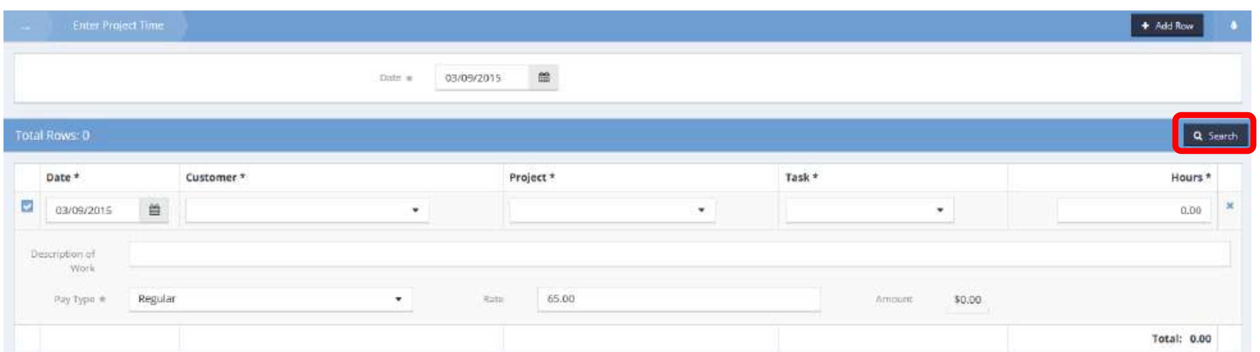
User Project Time

To initiate the time entry process, enter the desired week's date range. If hours for this date range exist, they display in the summary screen. To add new hours for the week, click **Add New** then **Add Row** on the following screen.



Select Customer. Projects that exist for that customer display in a drop-down list when requested. Select Project. Project tasks specified under that project display in a drop-down list when requested. Select Task. Enter a description of the work, the pay type and rate.

The amount calculates and displays. Click the **Save** button.

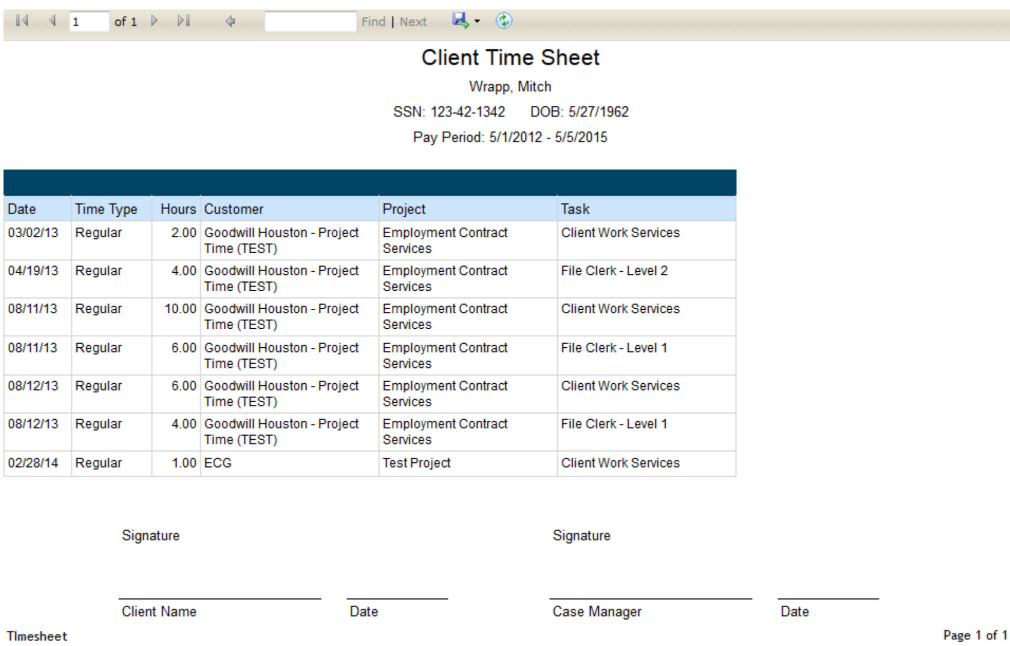


Once the hours are saved, the user is returned to the User Project Time (Summary) page. Click **Search** to verify that the hours were added to the database.

Print User Time Sheet

The Print Entity Time Sheet allows generation of a report for easy printing of user time. Enter a client name and a date range. Select either of the two print options if desired. Click the Report button.

The report displays in a new window where it can be printed.



Client Time Sheet

Wrapp, Mitch

SSN: 123-42-1342 DOB: 5/27/1962

Pay Period: 5/1/2012 - 5/5/2015

Date	Time Type	Hours	Customer	Project	Task
03/02/13	Regular	2.00	Goodwill Houston - Project Time (TEST)	Employment Contract Services	Client Work Services
04/19/13	Regular	4.00	Goodwill Houston - Project Time (TEST)	Employment Contract Services	File Clerk - Level 2
08/11/13	Regular	10.00	Goodwill Houston - Project Time (TEST)	Employment Contract Services	Client Work Services
08/11/13	Regular	6.00	Goodwill Houston - Project Time (TEST)	Employment Contract Services	File Clerk - Level 1
08/12/13	Regular	6.00	Goodwill Houston - Project Time (TEST)	Employment Contract Services	Client Work Services
08/12/13	Regular	4.00	Goodwill Houston - Project Time (TEST)	Employment Contract Services	File Clerk - Level 1
02/28/14	Regular	1.00	ECG	Test Project	Client Work Services

Signature

Signature

Client Name

Date

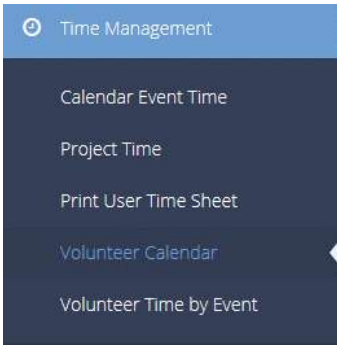
Case Manager

Date

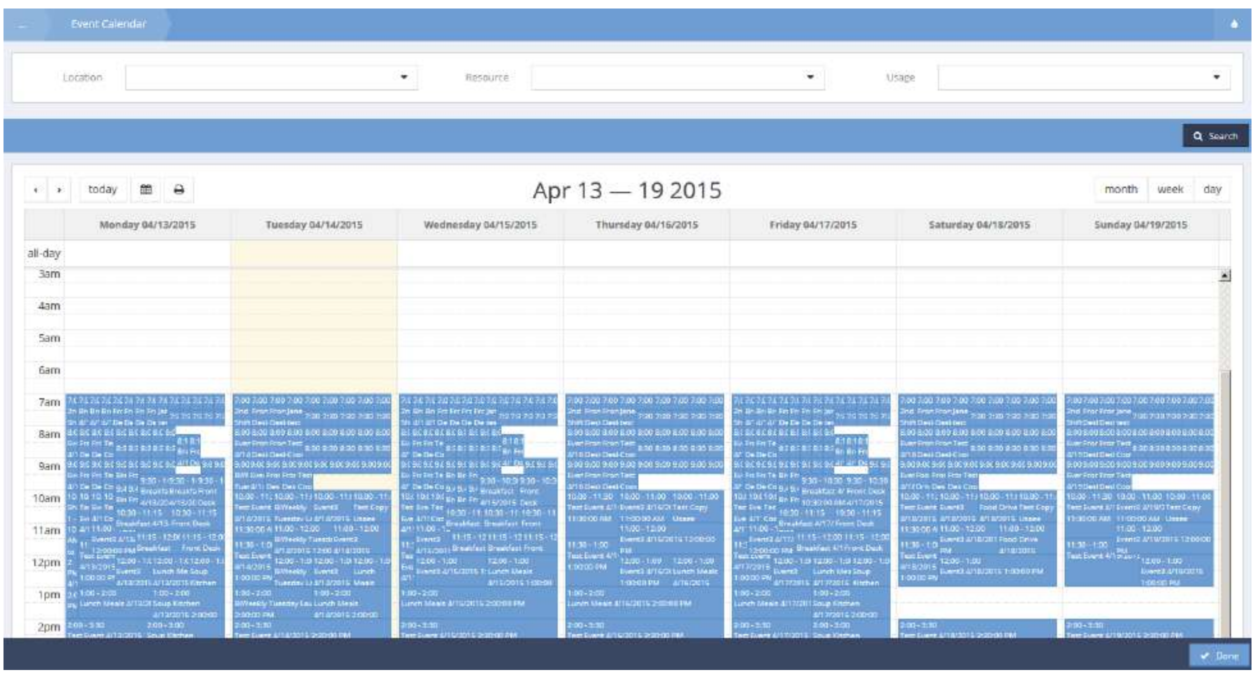
Timesheet

Page 1 of 1

Volunteer Calendar

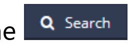


The volunteer calendar displays events for all volunteers. It is also located under Organization>Volunteers>Event Schedules / Calendar. A more in depth look at the calendar may be found in that section of this document.

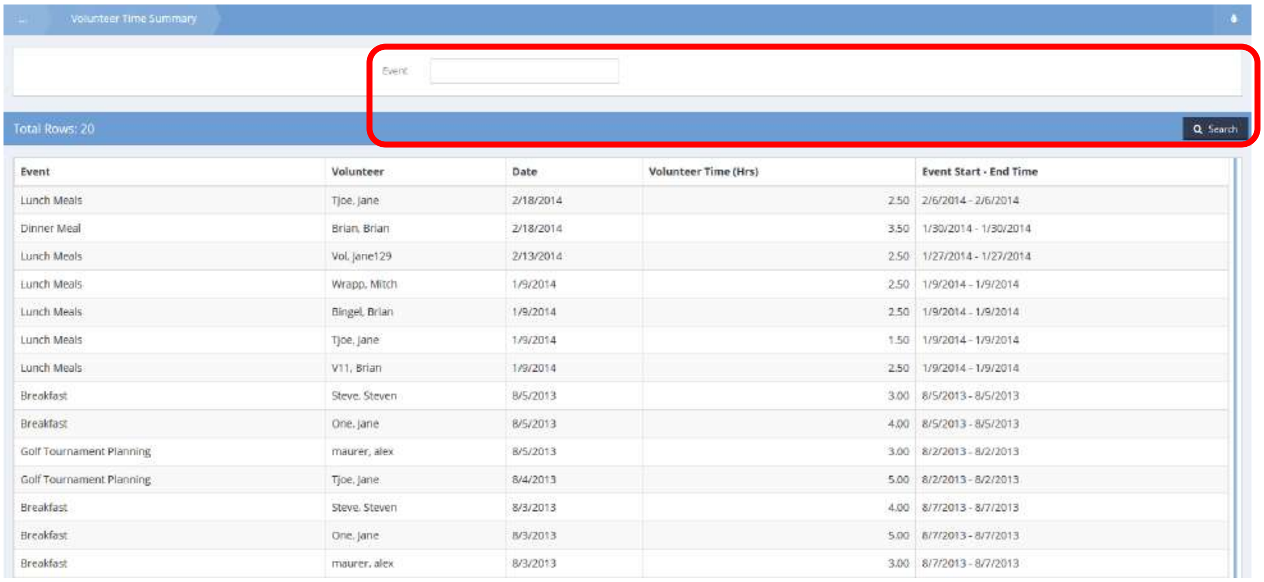


Volunteer Time by Event

The Volunteer Time Summary displays a list of volunteers and their time involved with an event.

The list can be filtered to a specific event by entering the event in the Event box and clicking the 

button.



Event	Volunteer	Date	Volunteer Time (Hrs)	Event Start - End Time
Lunch Meals	Tjoe, Jane	2/18/2014	2.50	2/6/2014 - 2/6/2014
Dinner Meal	Brian, Brian	2/18/2014	3.50	1/30/2014 - 1/30/2014
Lunch Meals	Vol, Jane129	2/13/2014	2.50	1/27/2014 - 1/27/2014
Lunch Meals	Wrapp, Mitch	1/9/2014	2.50	1/9/2014 - 1/9/2014
Lunch Meals	Bingel, Brian	1/9/2014	2.50	1/9/2014 - 1/9/2014
Lunch Meals	Tjoe, Jane	1/9/2014	1.50	1/9/2014 - 1/9/2014
Lunch Meals	V11, Brian	1/9/2014	2.50	1/9/2014 - 1/9/2014
Breakfast	Steve, Steven	8/5/2013	3.00	8/5/2013 - 8/5/2013
Breakfast	One, Jane	8/5/2013	4.00	8/5/2013 - 8/5/2013
Golf Tournament Planning	maurer, alex	8/5/2013	3.00	8/2/2013 - 8/2/2013
Golf Tournament Planning	Tjoe, Jane	8/4/2013	5.00	8/2/2013 - 8/2/2013
Breakfast	Steve, Steven	8/3/2013	4.00	8/7/2013 - 8/7/2013
Breakfast	One, Jane	8/3/2013	5.00	8/7/2013 - 8/7/2013
Breakfast	maurer, alex	8/3/2013	3.00	8/7/2013 - 8/7/2013

Organization

Find Organization

Providers

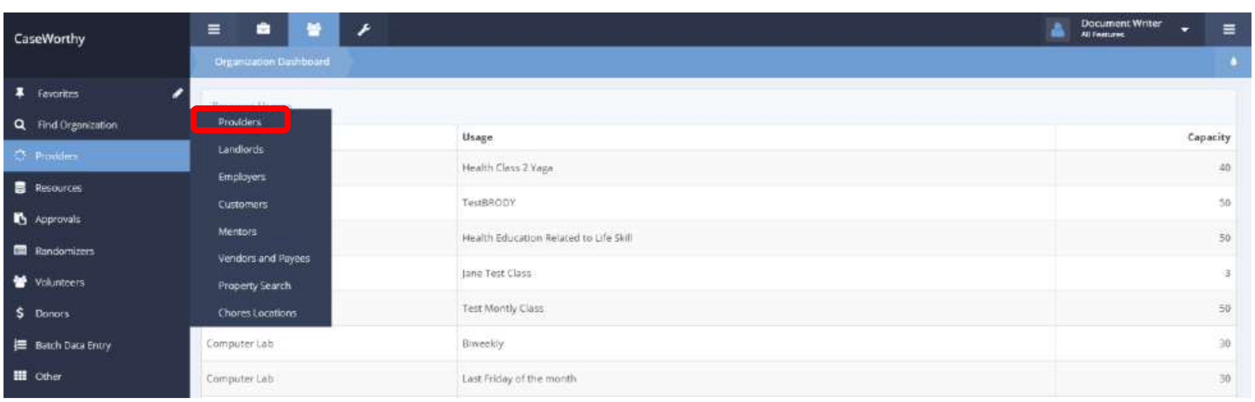
Providers

The first menu item in the Providers menu group is the "Providers" summary form. This form provides the user with a list of all providers associated with a given organization.

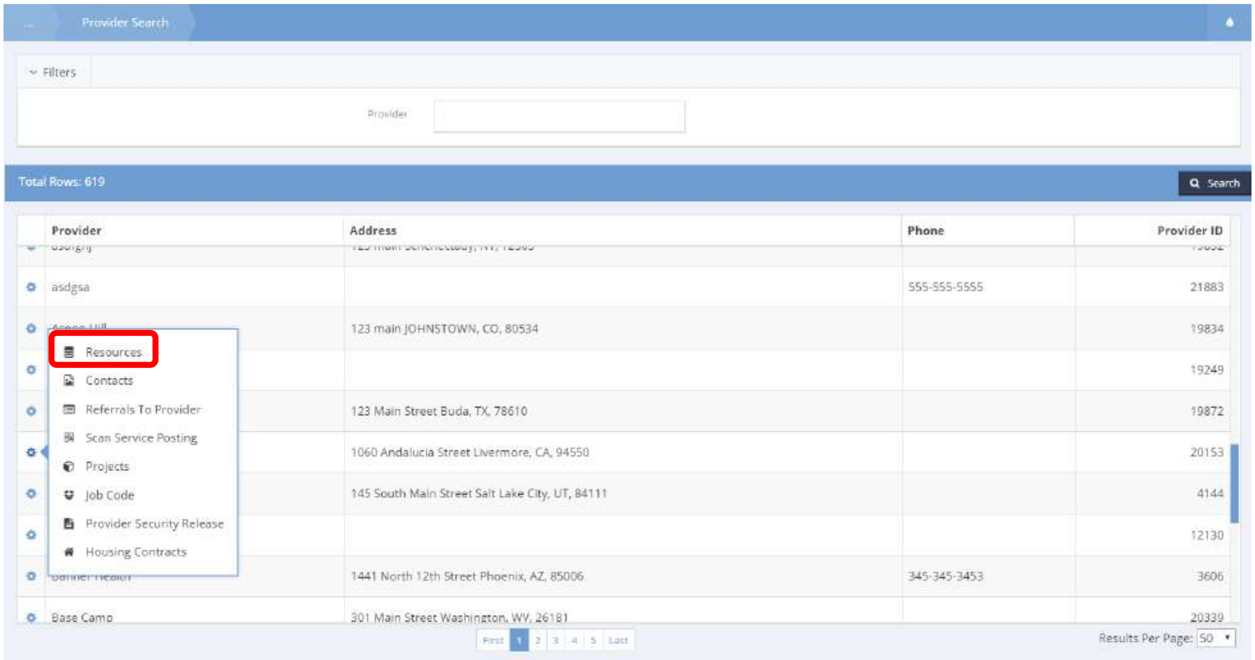
Provider Resources

Objective: A summary page of all Provider Resources.

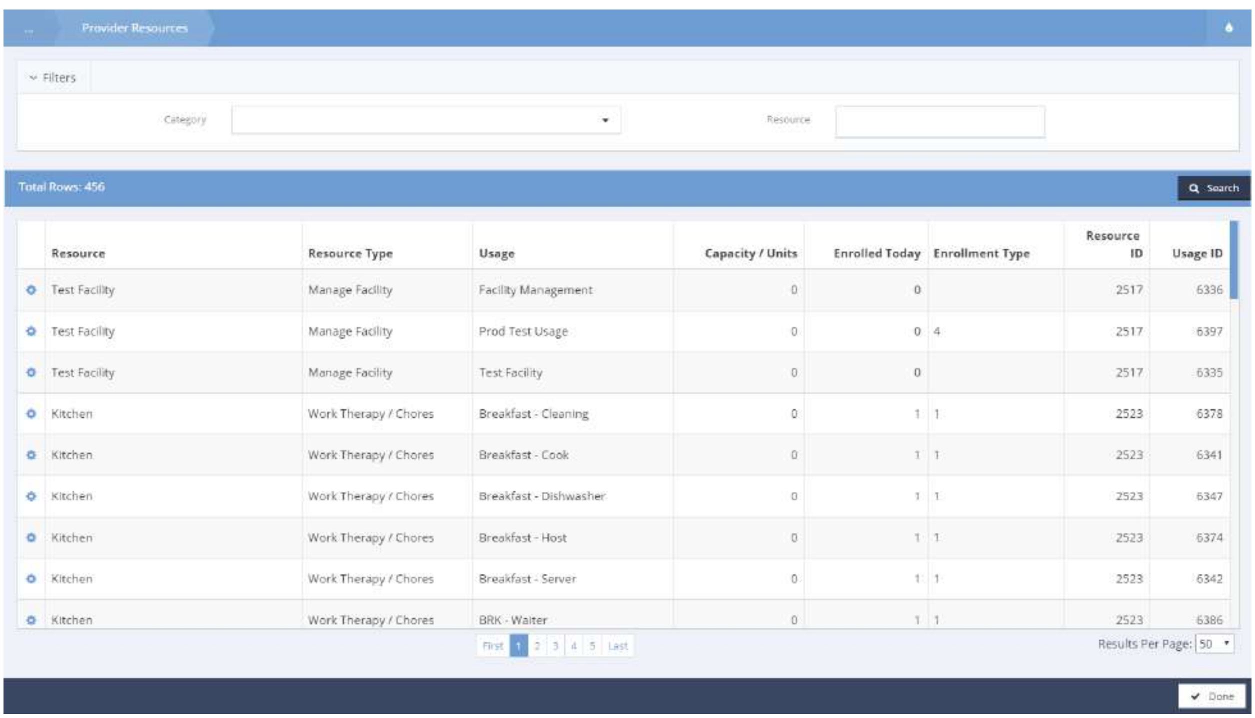
Navigation: Organization>Providers>Providers>Provider Resources



Under the Organization tab, select Providers. A pop-up menu appears. Select Providers. The Providers Search form appears.



Click the icon next to a provider. Select Resources from the pop-up menu that appears. The Provider Resources form appears.

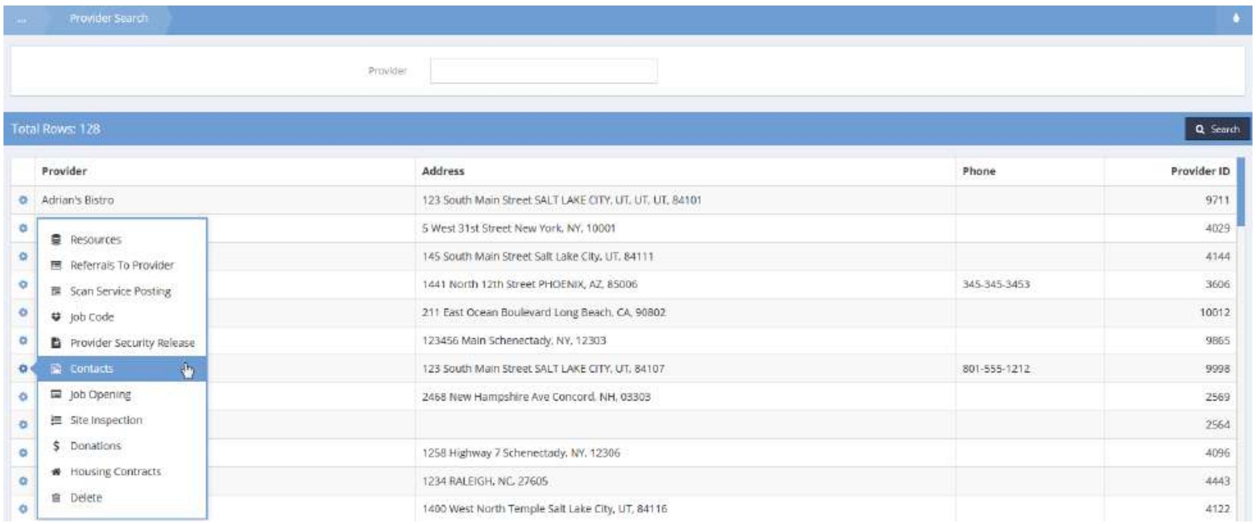


Listed are all resources associated with the chosen provider. Use the filter bar at the top to choose a category or a resource to search for. Click the ✔ Done button to return to the Provider Search form.

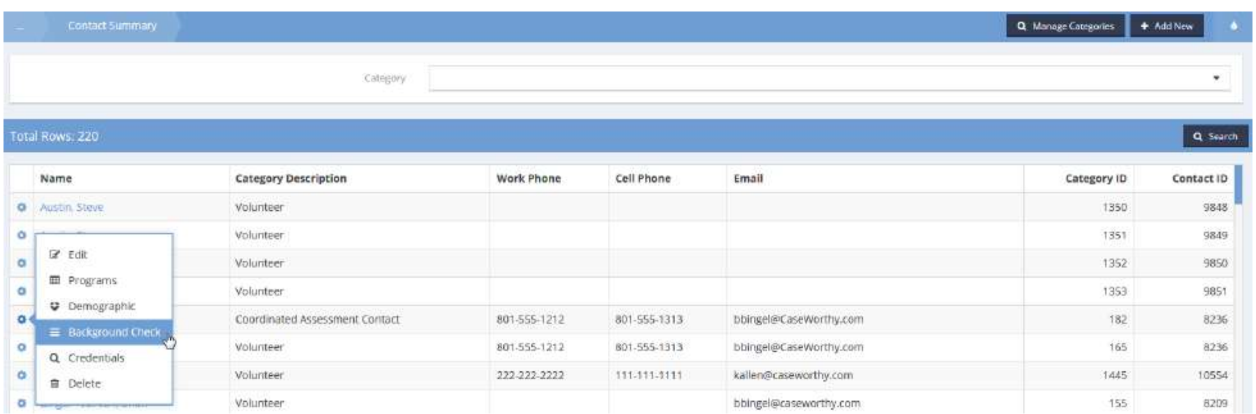
Note: ***Resources set up with category 'Resource' need a usage that is configured as "PrimaryUsage" to work with the reservation form that exists with a calendar.***

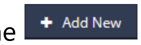
Enter Background Check Information

Objective: Create a new background check.



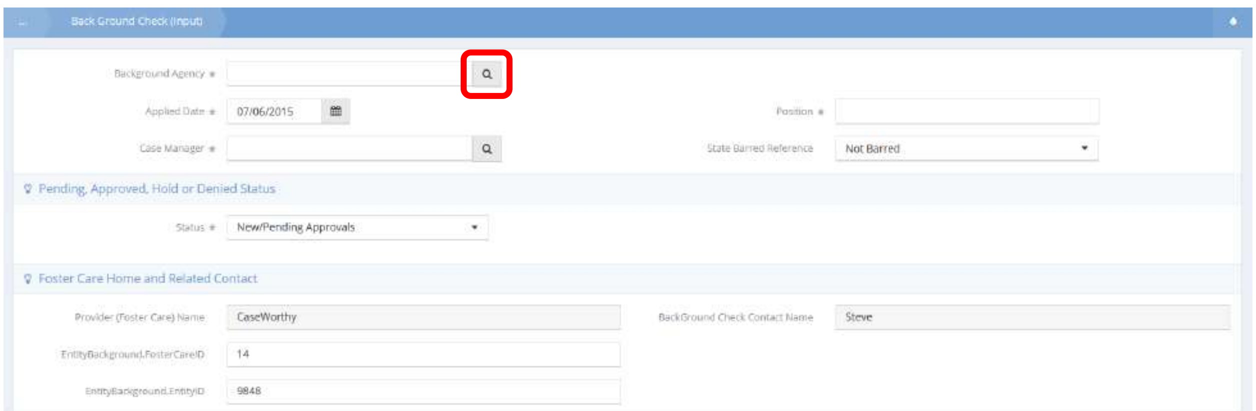
Click on the action gear icon associated with the desired provider and select Contacts from the pop up menu that appears. The Contact Summary form displays. Click on the action gear icon associated with the desired contact and select Background Check from the pop up menu that appears.



The Background Check Summary form displays. To create a new background check, click the 

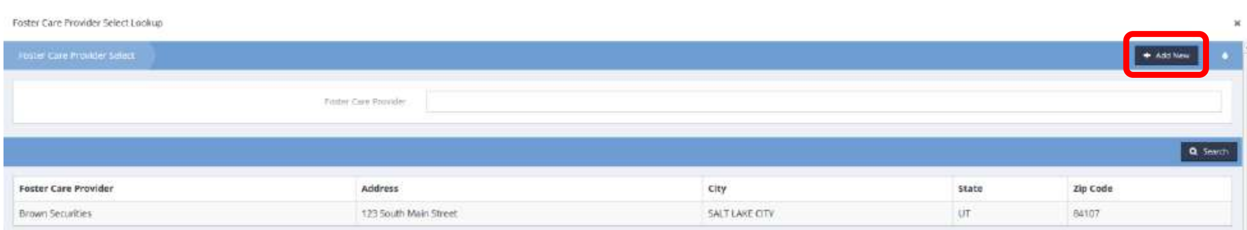
button.

The Back Ground Check (Input) form displays. Click the magnifying glass  icon to add a Background Agency.

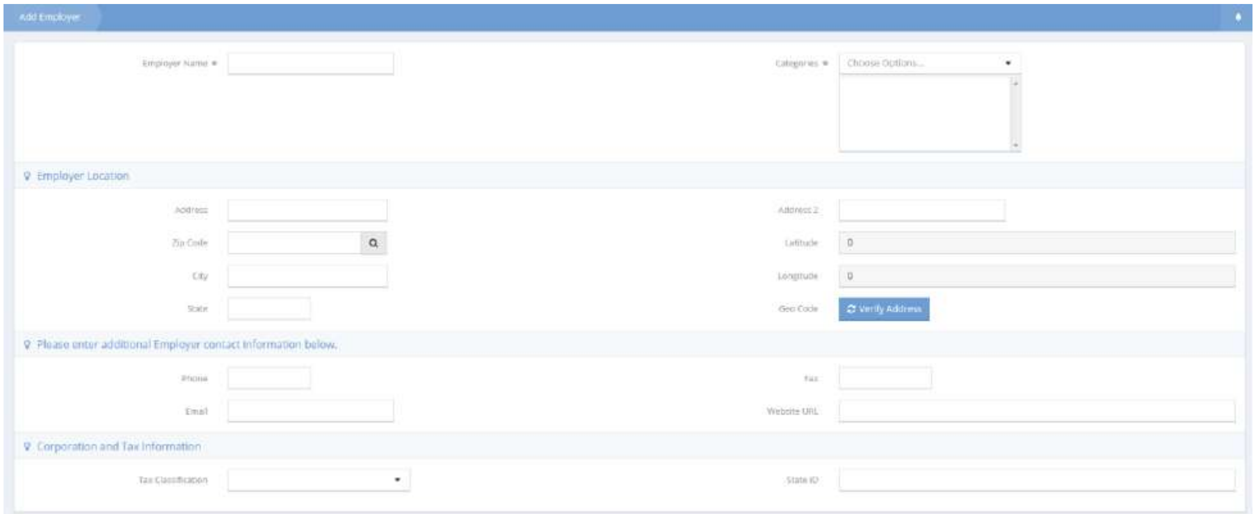


The Foster Care Provider Select lookup form displays. Select an existing provider from the list or click the 

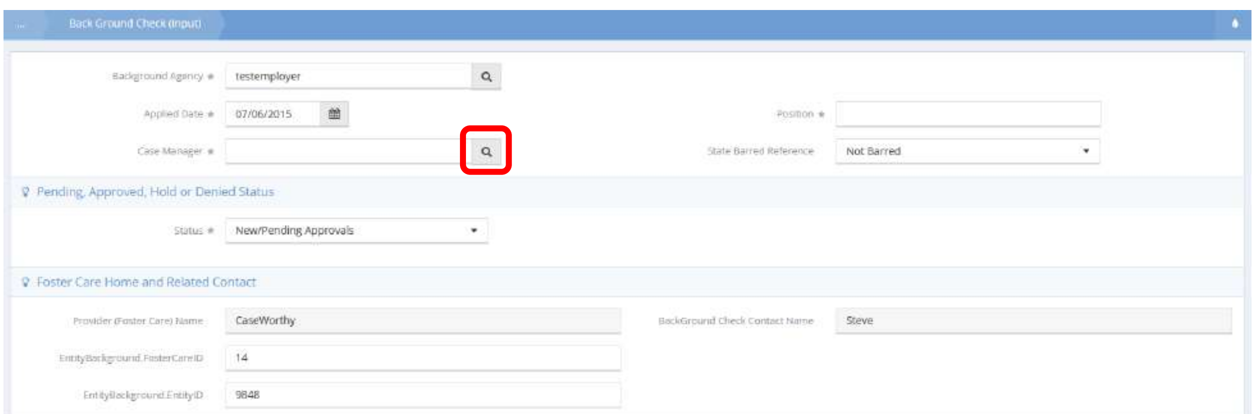
button to add a new provider.



The Add Employer form displays.

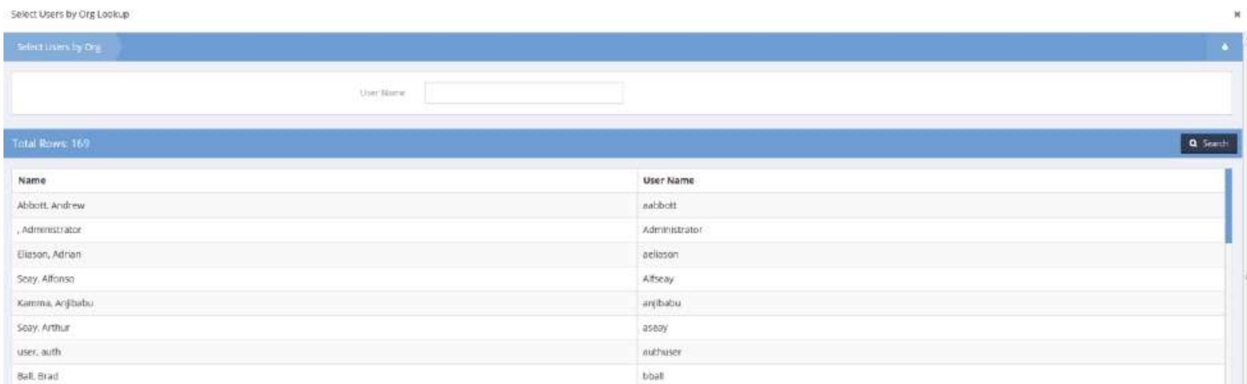


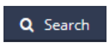
Enter an employer name and any desired categories. Add any other desired information and click the Save button. The background agency field now contains the added provider.



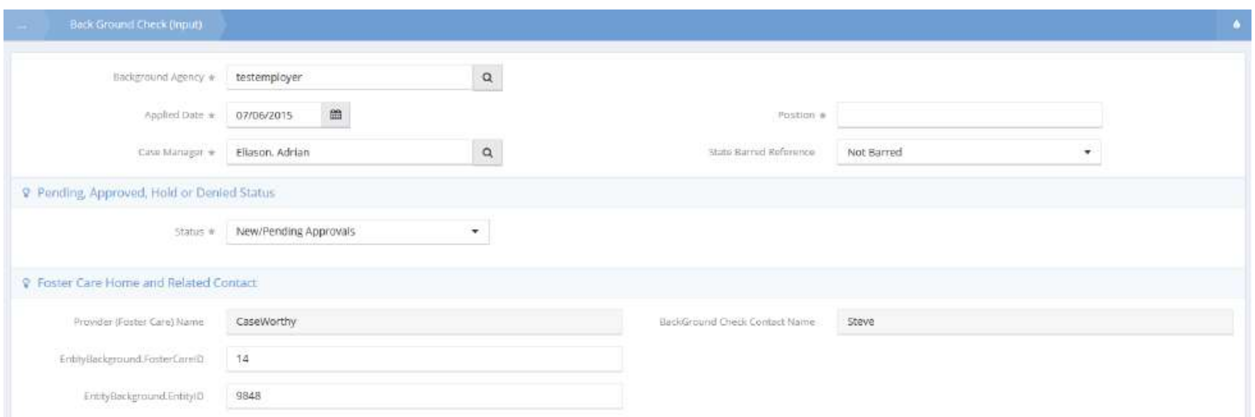
Click the magnifying glass icon for Case Manager.

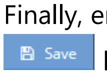
The Select Users by Org Lookup form displays.



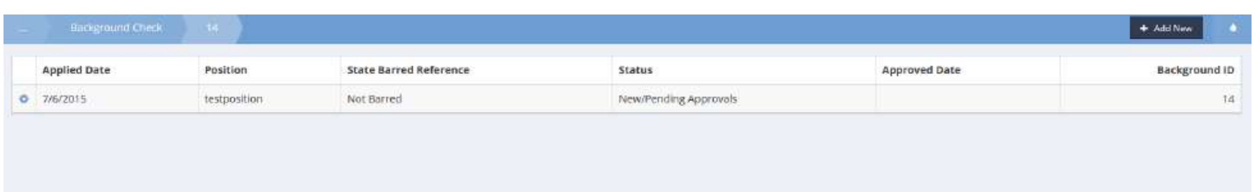
Select a user from the list. To search for a user, enter a name into the User Name field and click the 

button. The user's name appears in the Case Manager field.



Finally, enter a position in the Position field. Modify the remaining fields as necessary and click the 

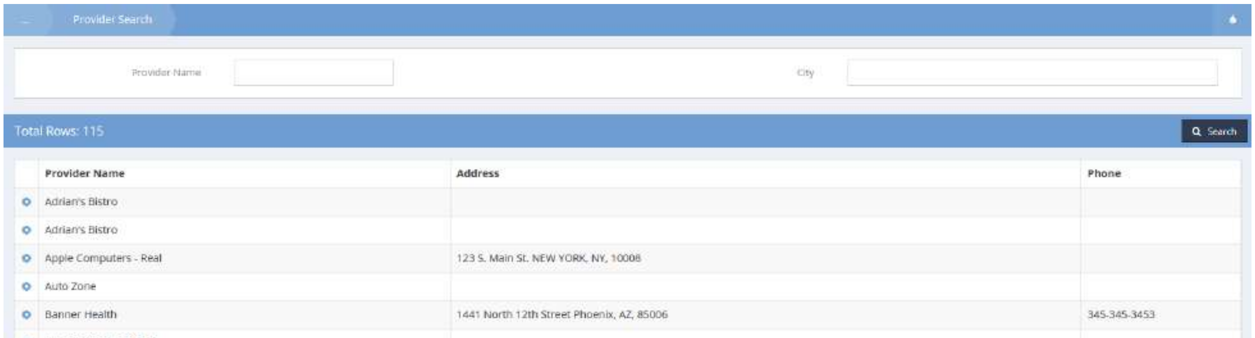
button when finished.



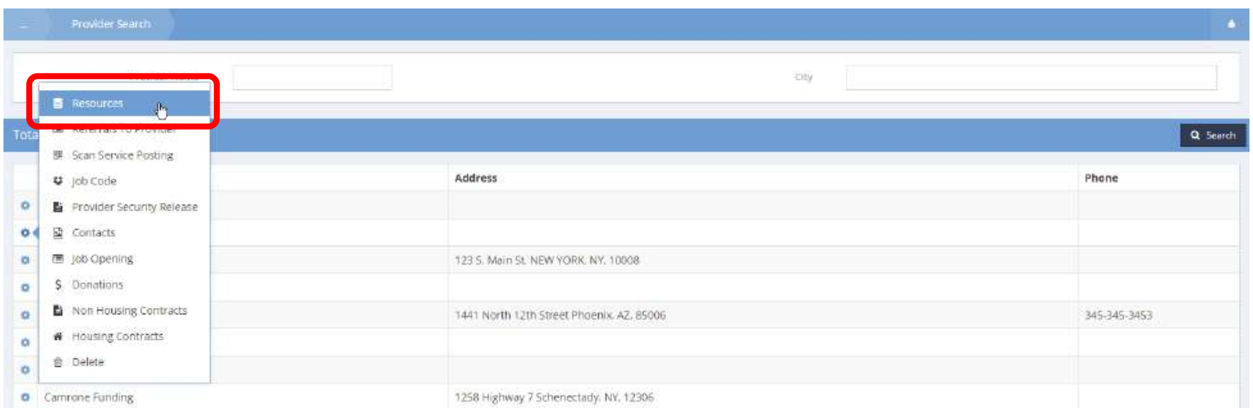
The Background Check Summary form reflects the newly added info.

Classroom Absence

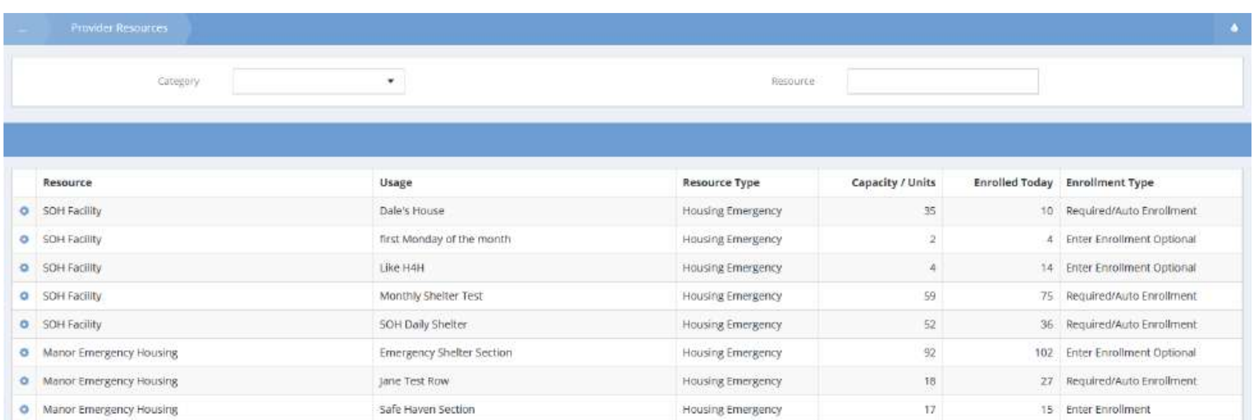
Objective: Manage absences with the classroom resource usage for a provider.



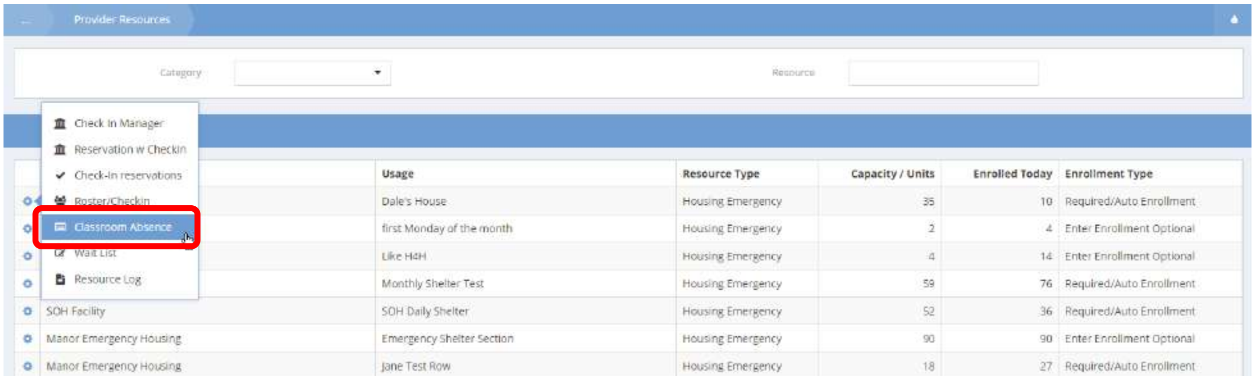
From the Provider Search form, click the action gear icon associated with the desired provider and select Resources from the pop up menu that appears.



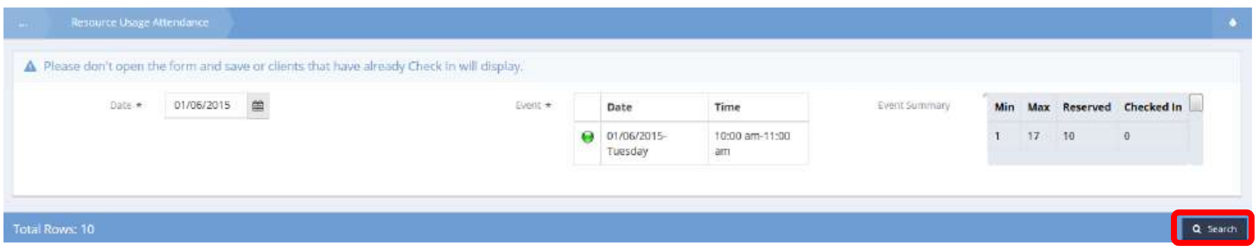
The Provider Resources form displays.



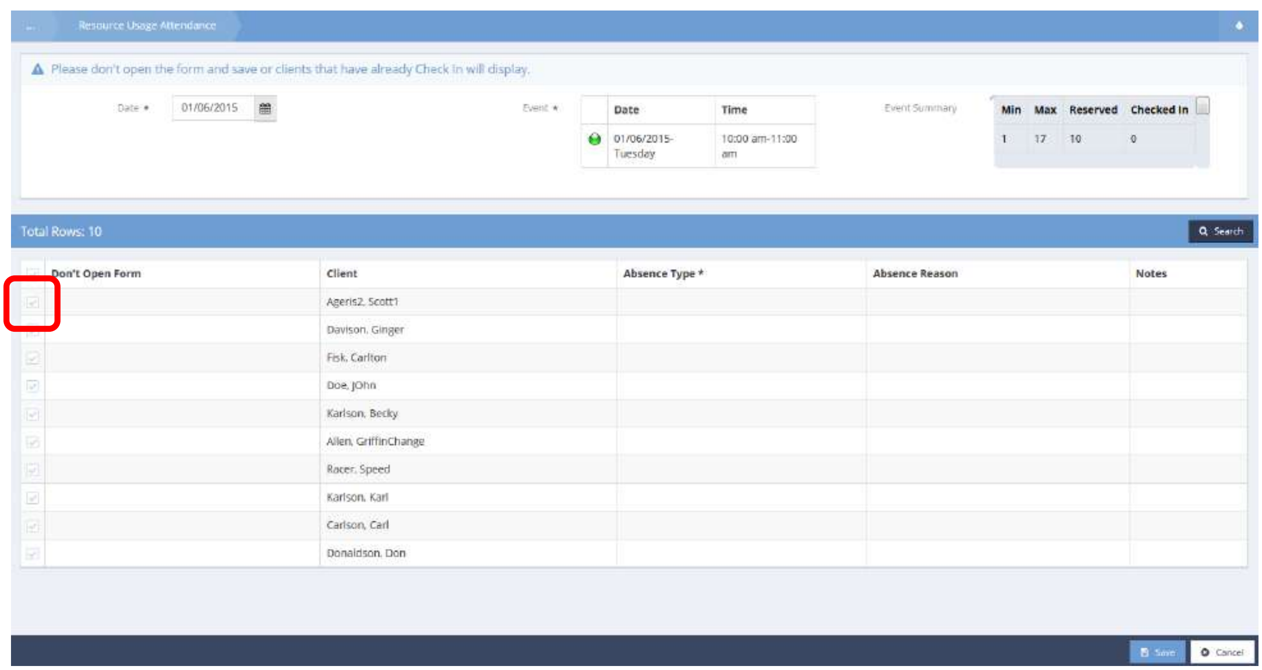
Click the action gear icon associated with the desired resource and select Classroom Absence from the pop up menu that appears.



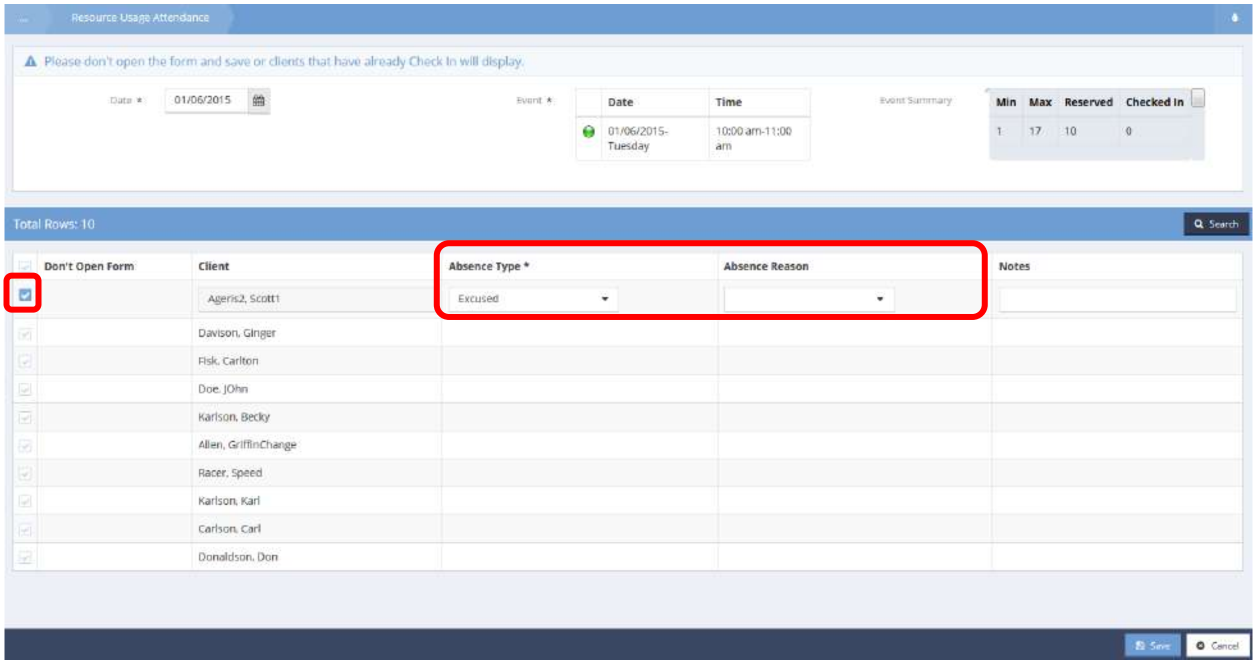
The Resource Usage Attendance form displays.



Select a date and event and then click on the Search button. Results display in the spreadsheet below the search parameters.



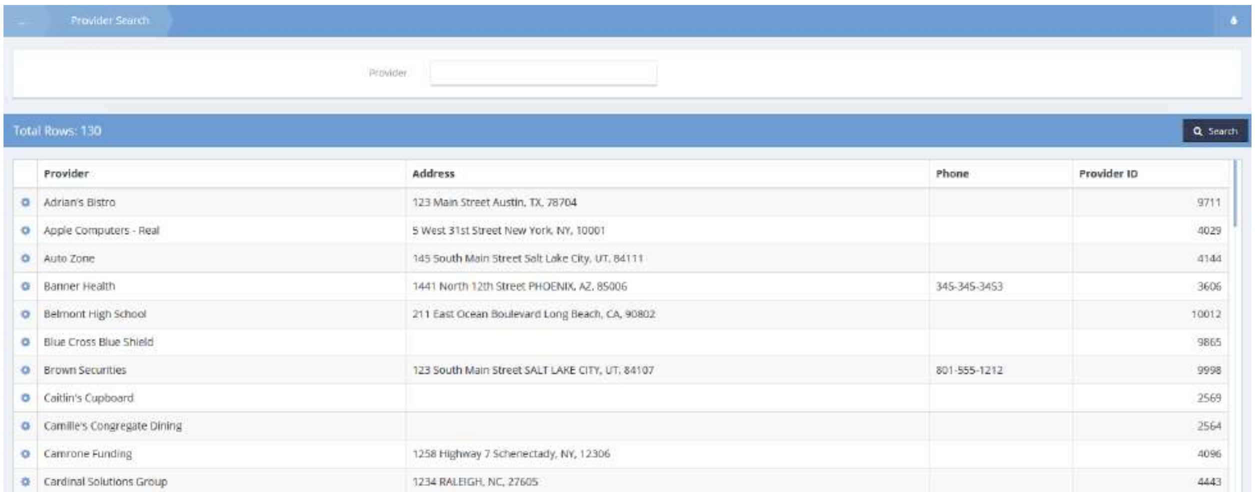
To modify an absence or make notes, click the clear checkbox next to an entry.



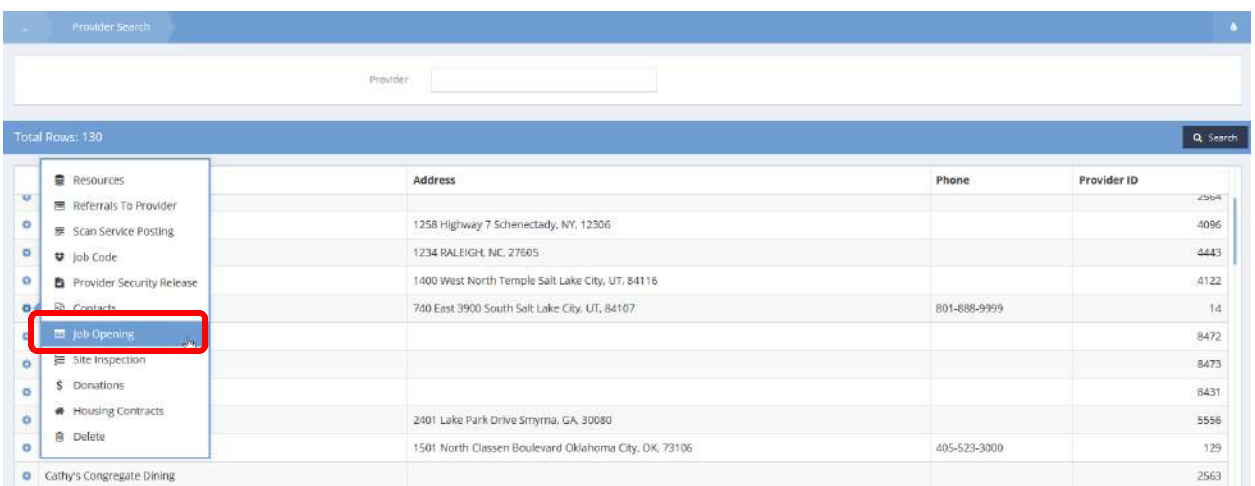
The row expands. Click on the Absence Type field and select a value from the drop-down list that appears. Add a reason and notes if desired. Click on the  button.

Update Employer Status - Job Match Edit

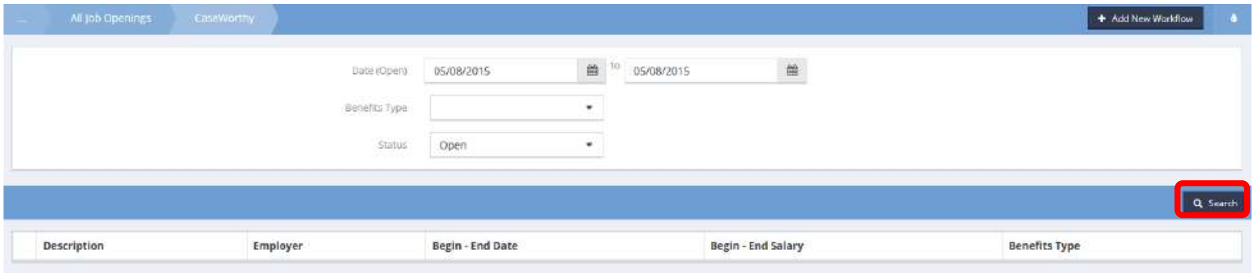
Objective: Update the employer status on a job match, indicating whether the employer has reviewed the application, is interested in the client or not.



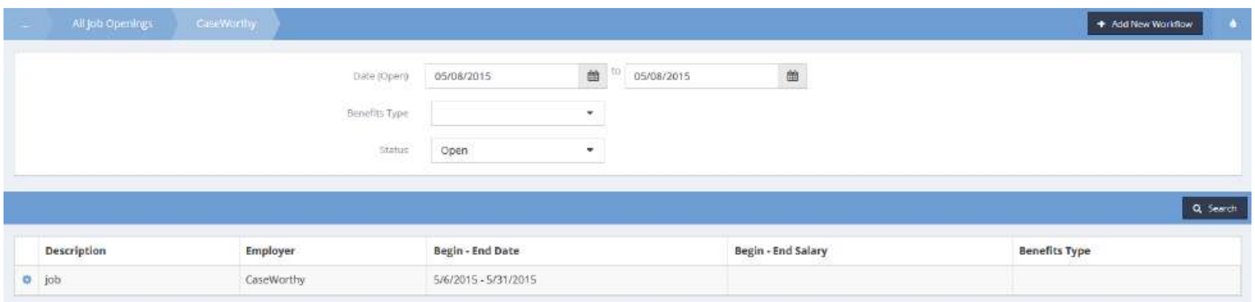
Click on the action gear  icon for the desired provider and select Job Opening from the pop up menu that appears.



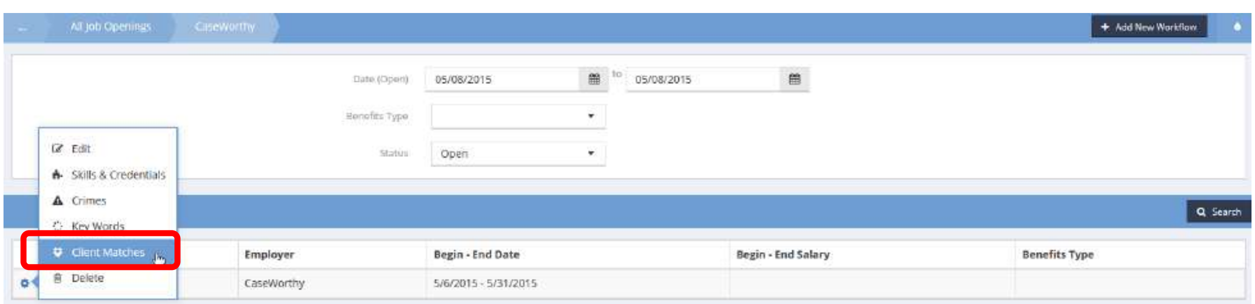
The All Job Openings form displays.



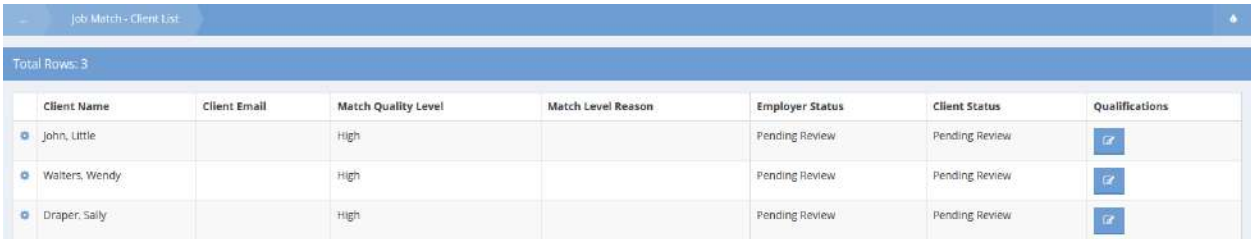
Alter the date range, benefits type and status if desired and click on the Search button. The form displays a list of qualifying job openings.



Click on the action gear icon for the desired job opening and select Client Matches from the pop up menu that appears.

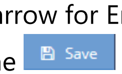


The Job Match – Client List form displays a list of clients whose qualifications match the job requirements.



Click on the action gear  icon associated with the desired client and select Update Employer Status from the pop up menu that appears.

The Update Employer Status - Job Match Edit form displays.

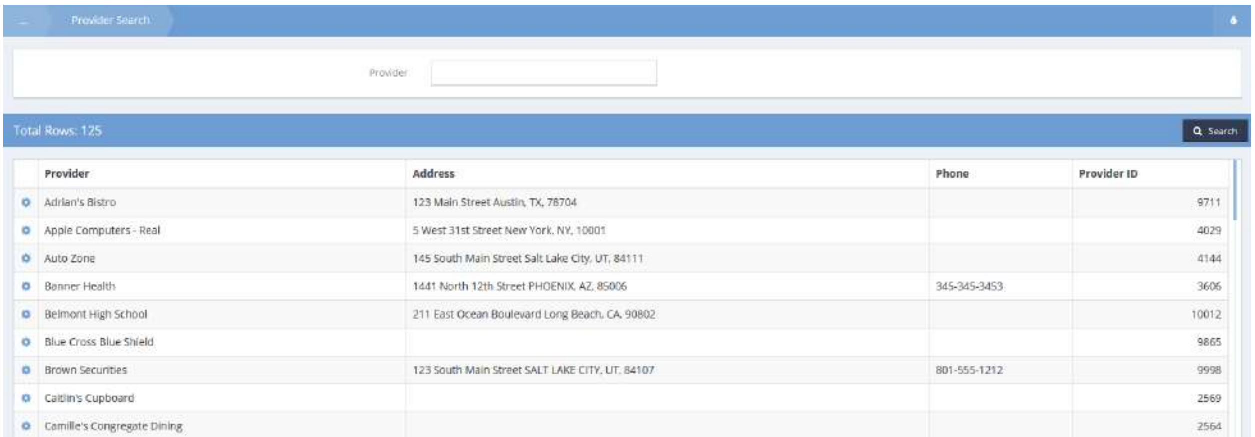
Click on the down arrow for Employer Status and select the desired value from the drop-down list that appears. Click on the 

button.

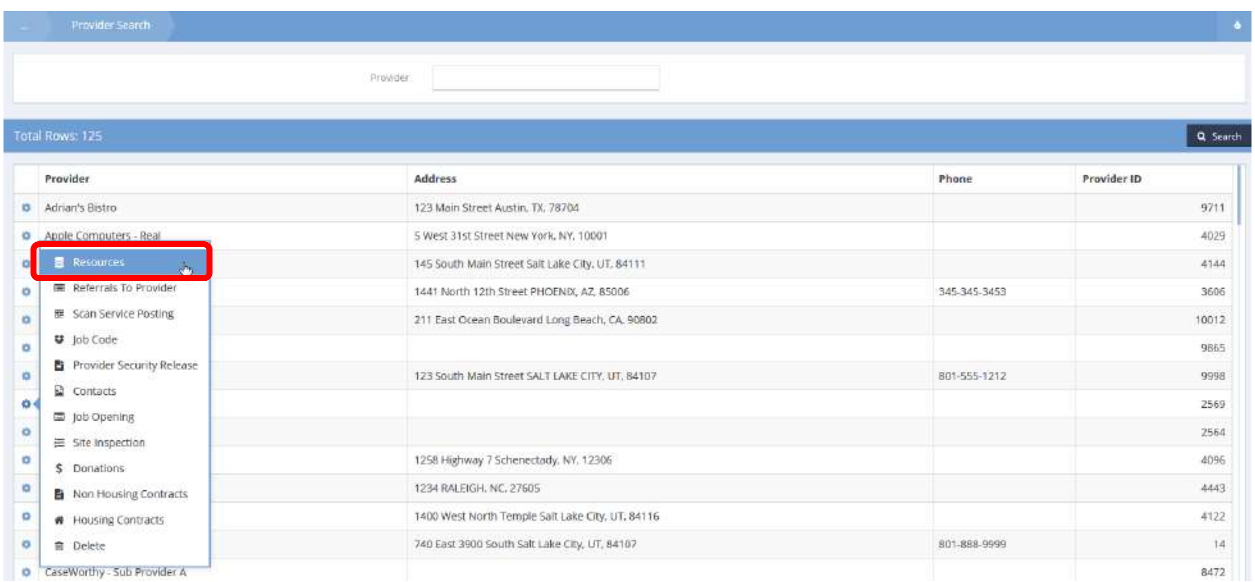
**Alternate navigation path for this functionality is Organization>Providers>Job Orders (View/Edit Job Orders | Action Gear | Client Matches | Action Gear |Update Employer Status)*

Reservation with Check-in

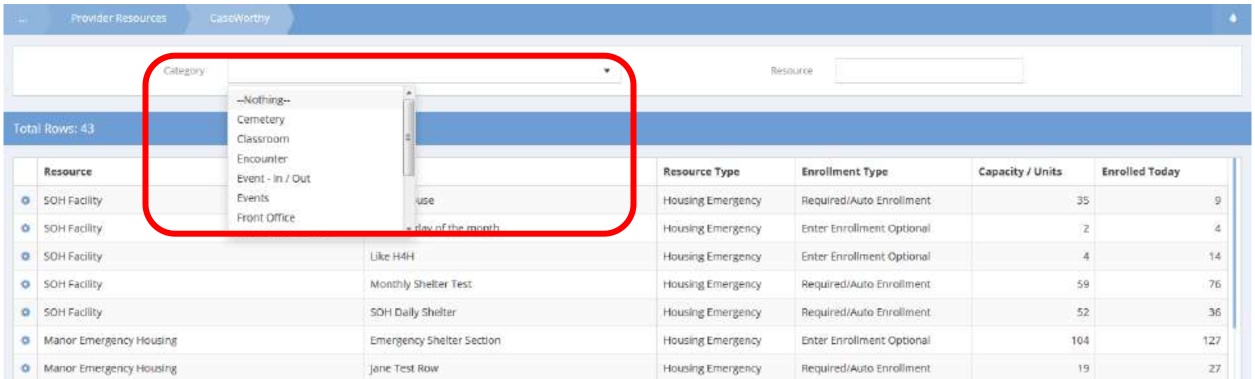
Objective: Make a client reservation for service and check the client in at the same time.



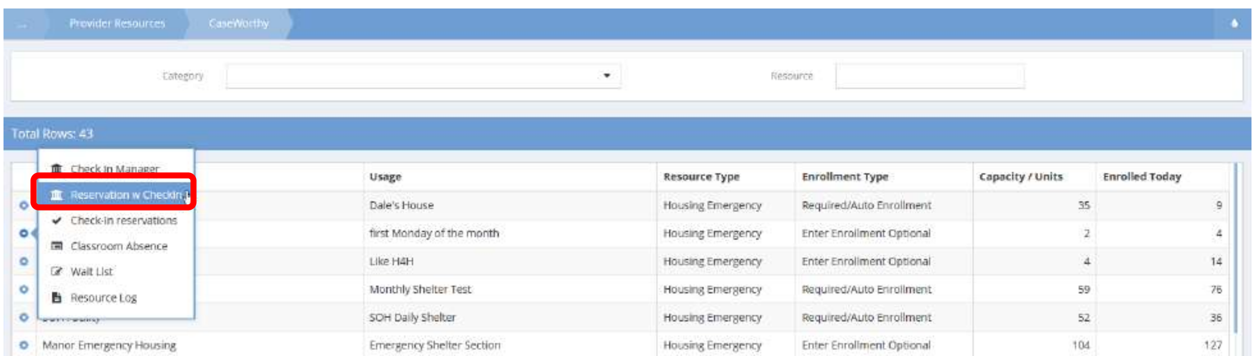
The Provider Search page displays a list of providers. Locate the desired provider and click on the action gear at the left of the provider name.



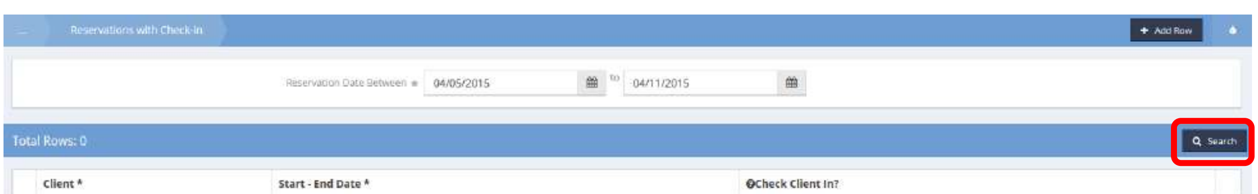
Select Resources. A list of resources for that provider displays. Refine the list by selecting a category from the drop-down list.



Click the action gear for the specific resource and select Reservation w Checkin.

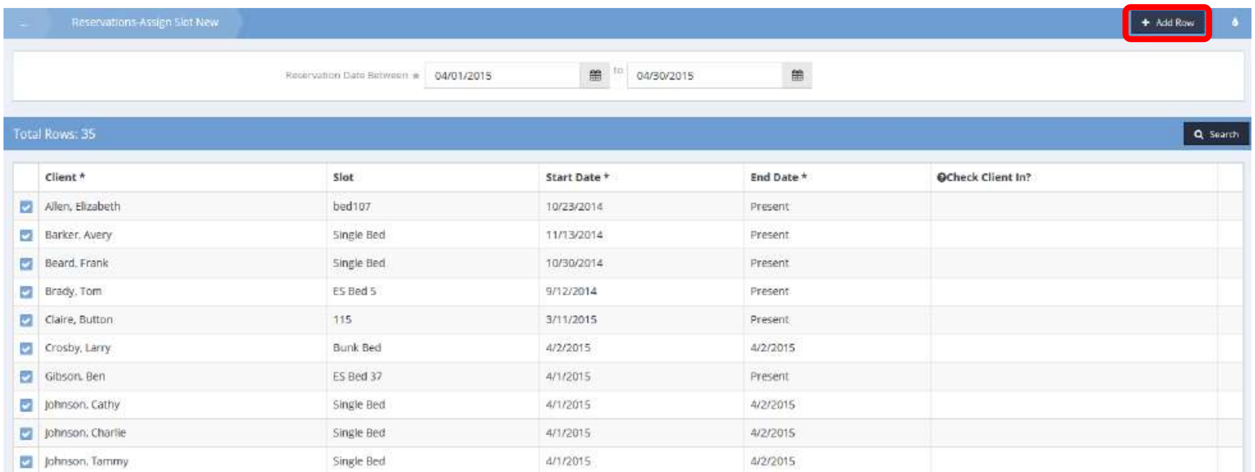


The Reservations with Check-in form appears.

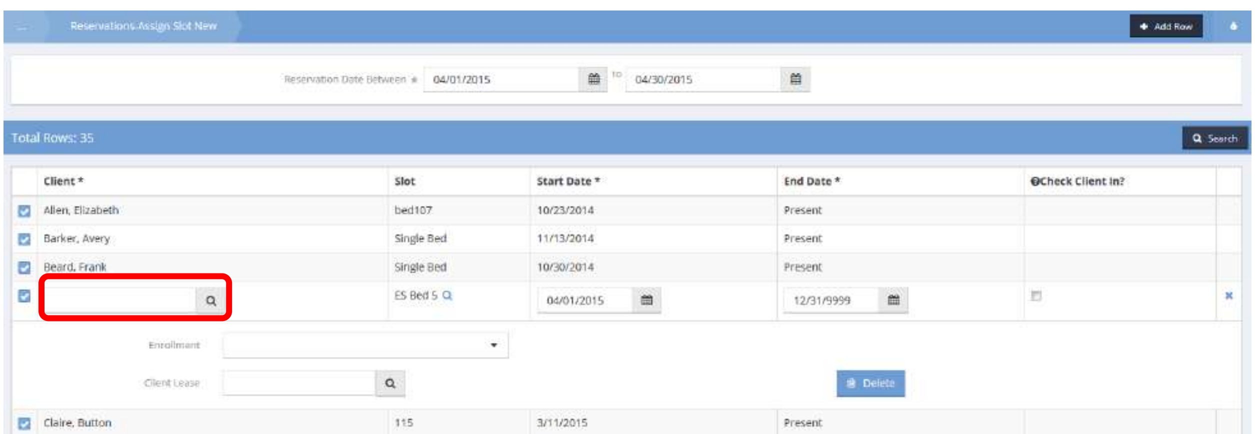


Verify the reservation dates and click on the Search button.

All reservations for the resource appear.



Click on the + Add Row button. The expanded row displays.



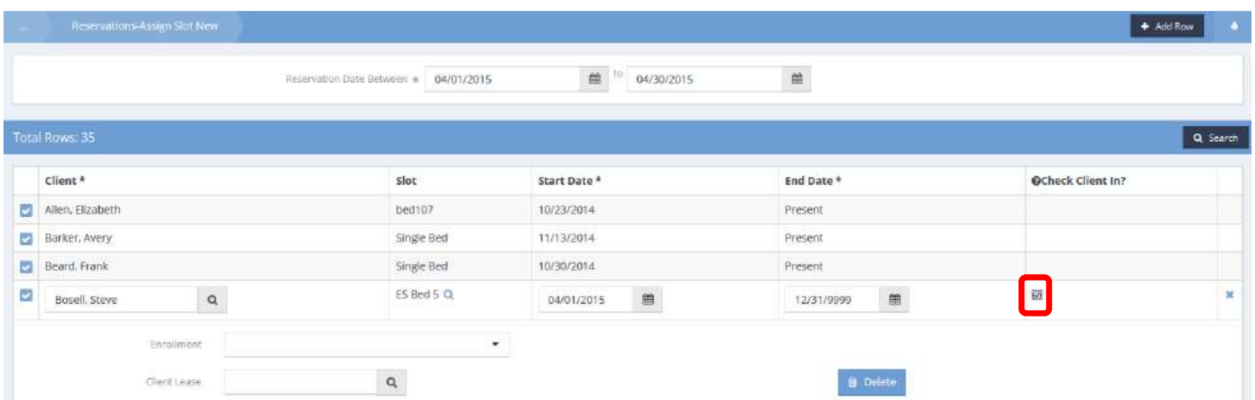
Click on the Client Name field. The Find Client with Reservation Information Lookup form displays.

Enter the client name or a portion thereof and click on the Search button.

A list of matching clients displays.

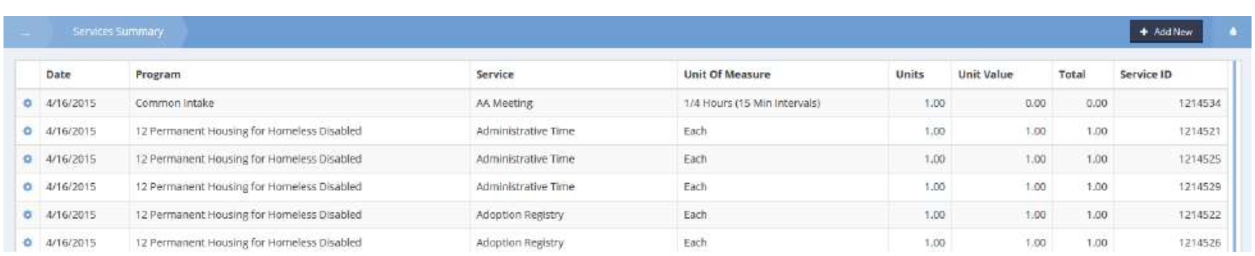
Select the desired client from the list.

CaseWorthy™ returns to the Reservations-Assign Slot New form with the client name in the row. Adjust the dates if needed. Click the Check Client In checkbox.

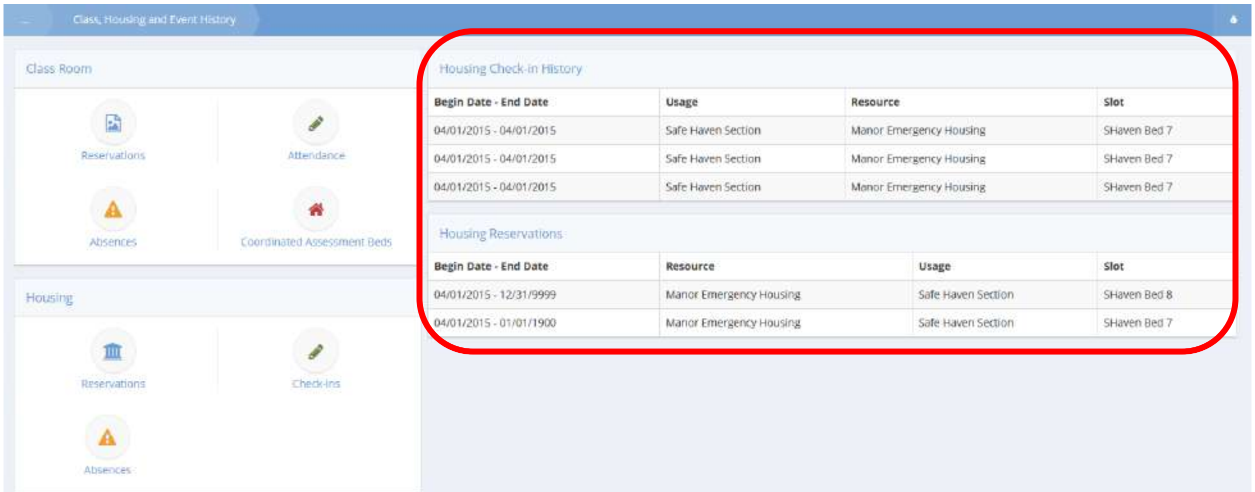


Click on the  button.

In the background, CaseWorthy™ has logged the housing service.

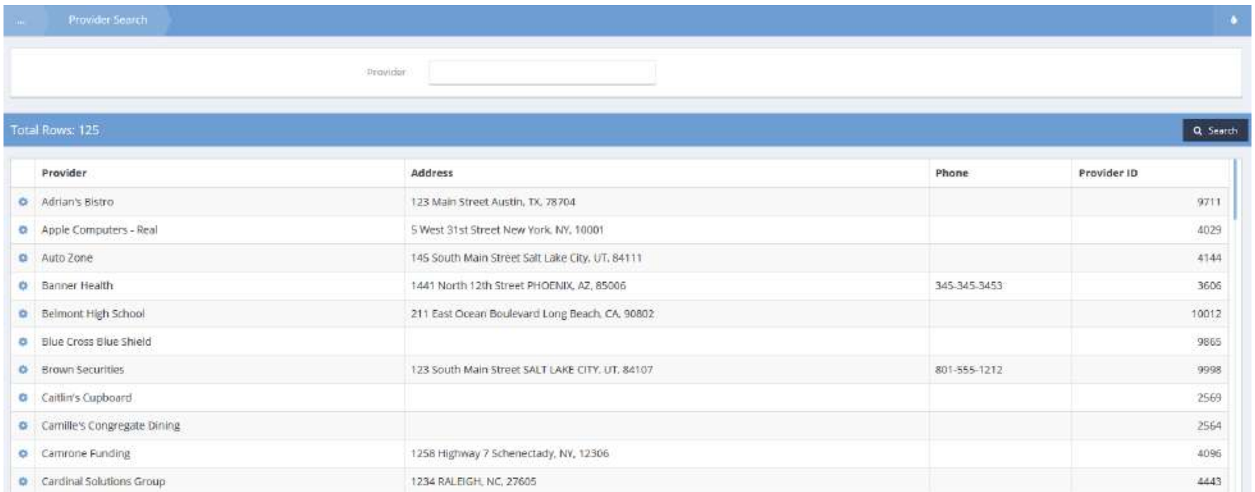


The Housing Check-In History table on the Class and Housing History dashboard also shows the service

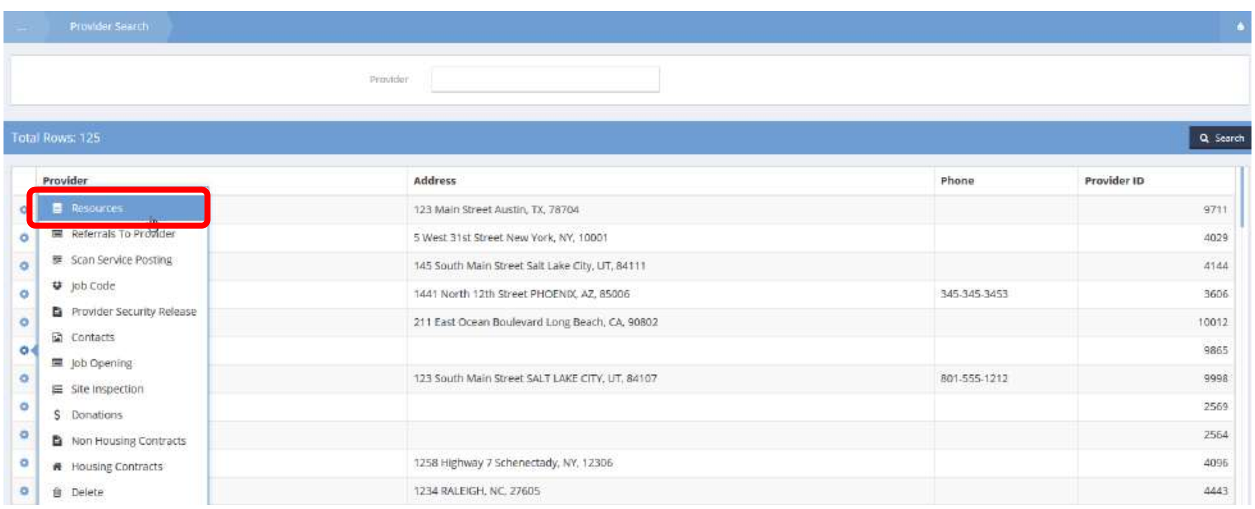


Reservation / Slot Assignment w Check-In

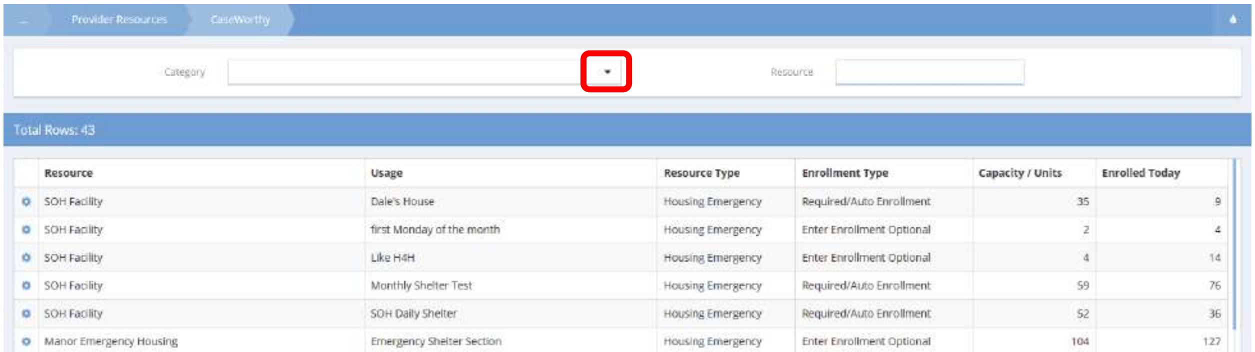
Objective: Provide a checkbox on the reservation form that indicates Create Check-in. When checked, the Check-in Dates default to the same as the reservation dates. If the reservation is for a multi-month period, the check-in is only through the end of the current month.



Select Resources from the pop-up menu when the action gear icon to the left of the desired provider is clicked.

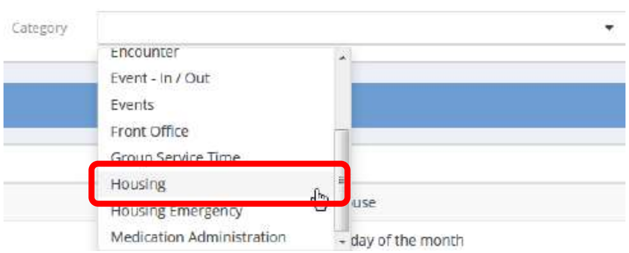


The Provider Resources form displays.

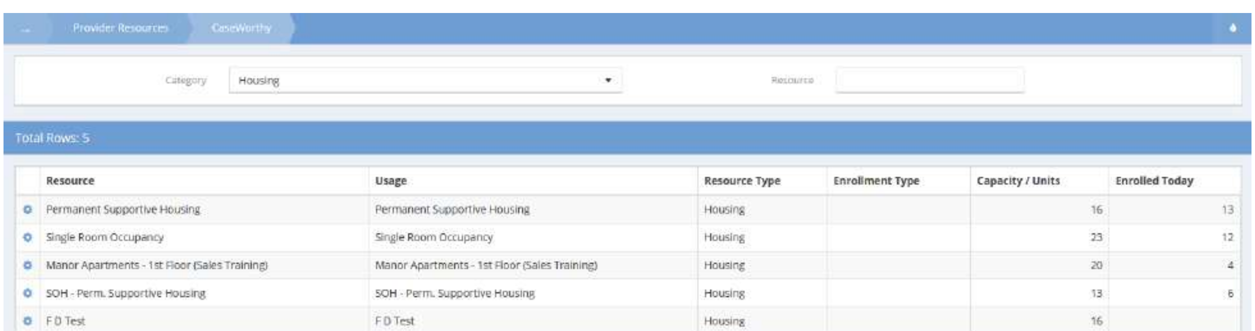


Resource	Usage	Resource Type	Enrollment Type	Capacity / Units	Enrolled Today
SOH Facility	Dale's House	Housing Emergency	Required/Auto Enrollment	35	9
SOH Facility	first Monday of the month	Housing Emergency	Enter Enrollment Optional	2	4
SOH Facility	Like H4H	Housing Emergency	Enter Enrollment Optional	4	14
SOH Facility	Monthly Shelter Test	Housing Emergency	Required/Auto Enrollment	59	76
SOH Facility	SOH Daily Shelter	Housing Emergency	Required/Auto Enrollment	52	36
Manor Emergency Housing	Emergency Shelter Section	Housing Emergency	Enter Enrollment Optional	104	127

Select Housing from the drop-down list accessed by clicking on the down arrow at the far right of the Category field.

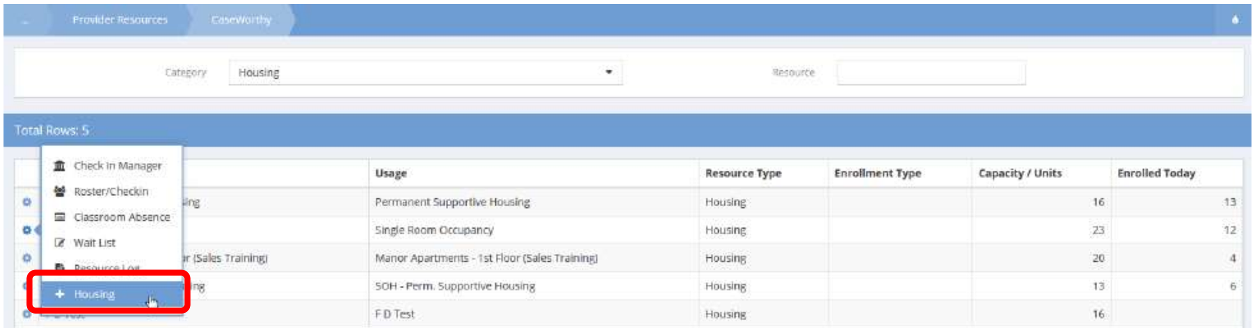


The filtered resource list displays on the Provider Resources form.

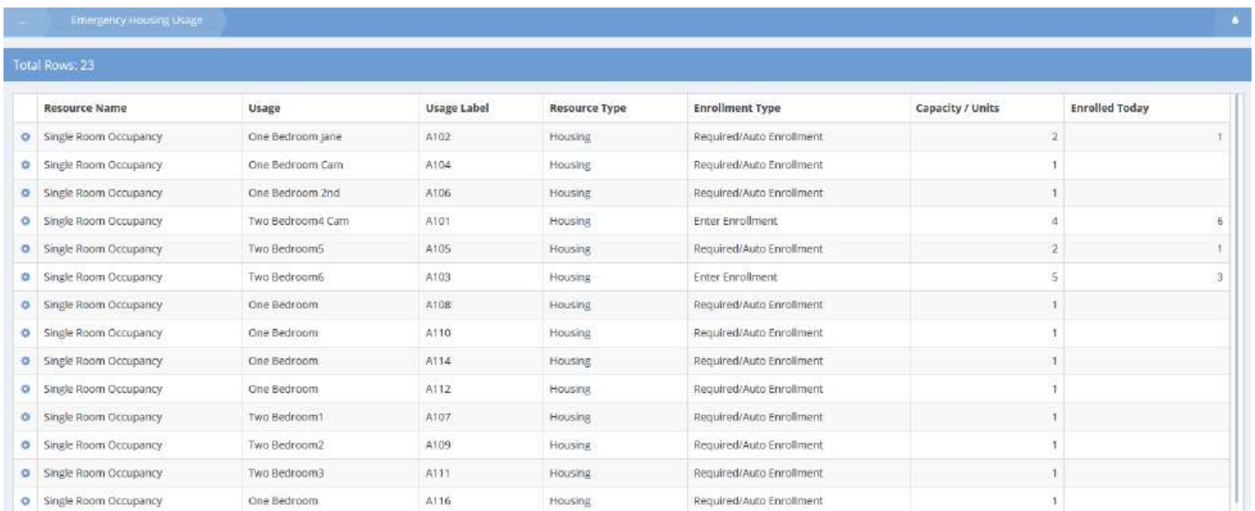


Resource	Usage	Resource Type	Enrollment Type	Capacity / Units	Enrolled Today
Permanent Supportive Housing	Permanent Supportive Housing	Housing		16	13
Single Room Occupancy	Single Room Occupancy	Housing		23	12
Manor Apartments - 1st Floor (Sales Training)	Manor Apartments - 1st Floor (Sales Training)	Housing		20	4
SOH - Perm. Supportive Housing	SOH - Perm. Supportive Housing	Housing		13	6
F D Test	F D Test	Housing		16	

Select Housing from the pop-up menu that displays after clicking on the action gear to the left of the desired resource.

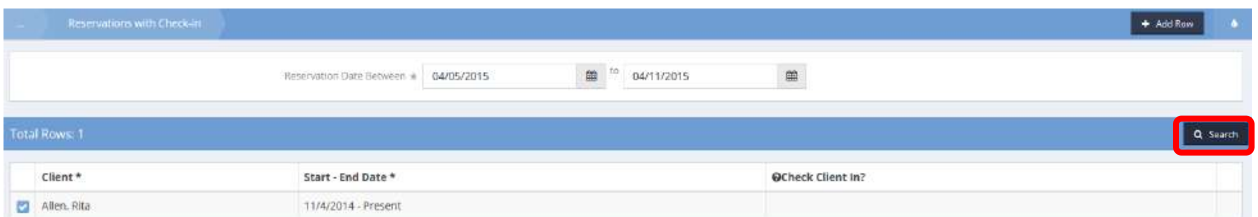


The Emergency Housing Usage form appears.

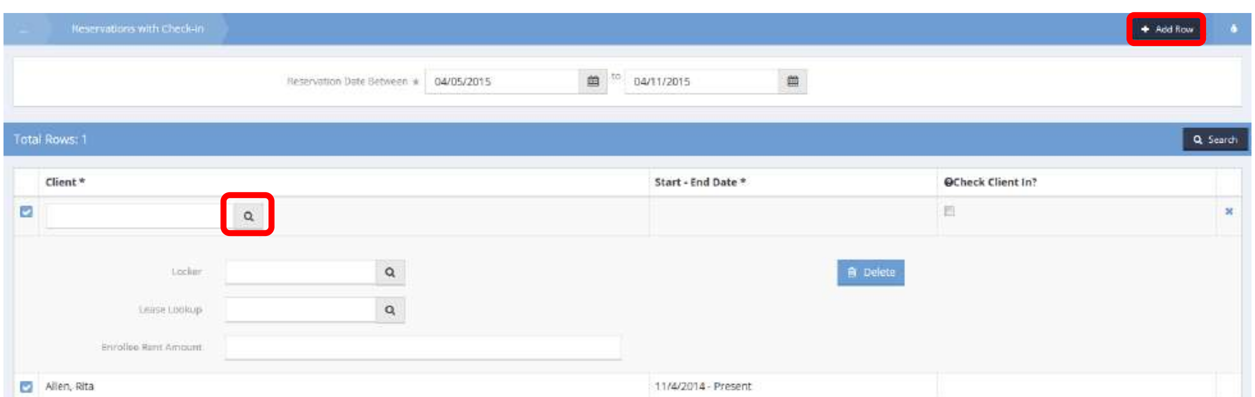


Click on the action gear to the left of the desired resource usage. Select Reservation/Slot Assignment Check-In from the pop-up menu that displays.

The Reservations – Assign Slot New form displays. Click on the Search button to see existing and previous reservations for this room.



Click on the Add Row button to create a reservation. A new, expanded row appears.

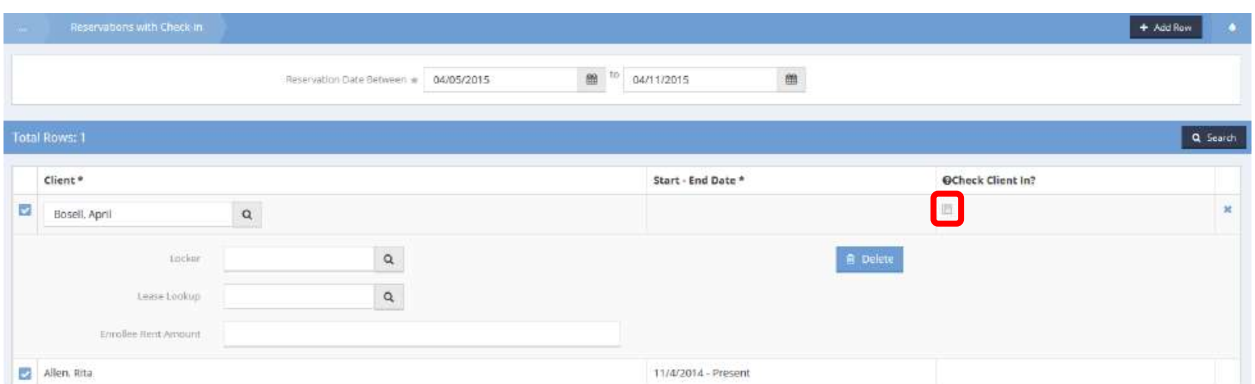


Click on the magnifying glass icon for Client. The Find Client with Reservation Information Lookup form opens.

Enter search criteria, such as the first few letters of the last name, and click the Search button.

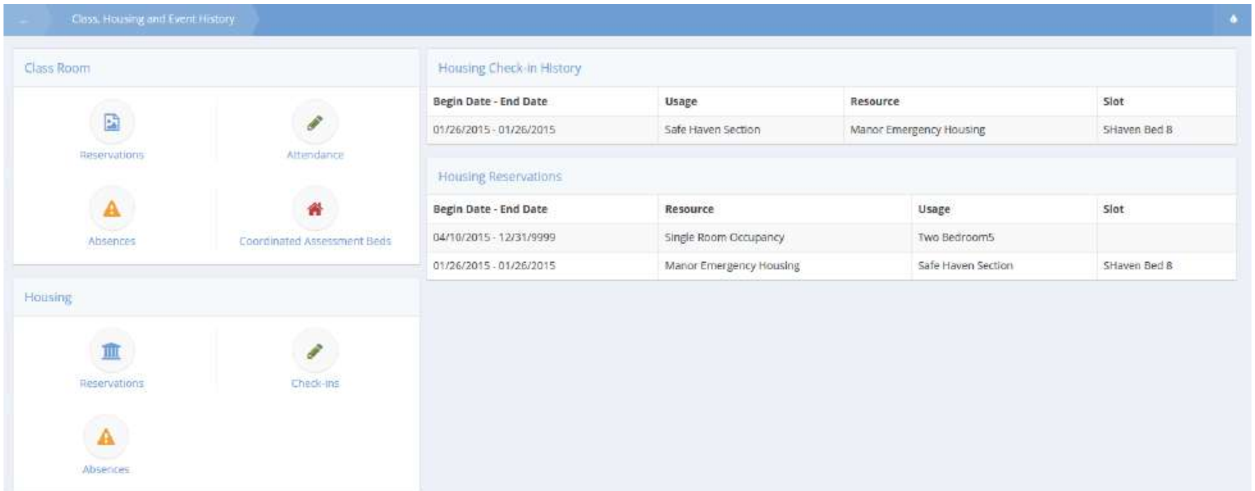
A list of matching names displays.

Select the desired client by clicking on the associated row.



The Client name fills. Check the Check Client In? checkbox and select the program from the drop-down list accessed by clicking on the down arrow at the far right of the Enrollment field. Click the Save button.

To verify the reservation and check in, navigate to the client's housing history dashboard (Case Management>Client Information>Class and Housing History).



The reservation and the check-in correctly appear in the tables on the dashboard.

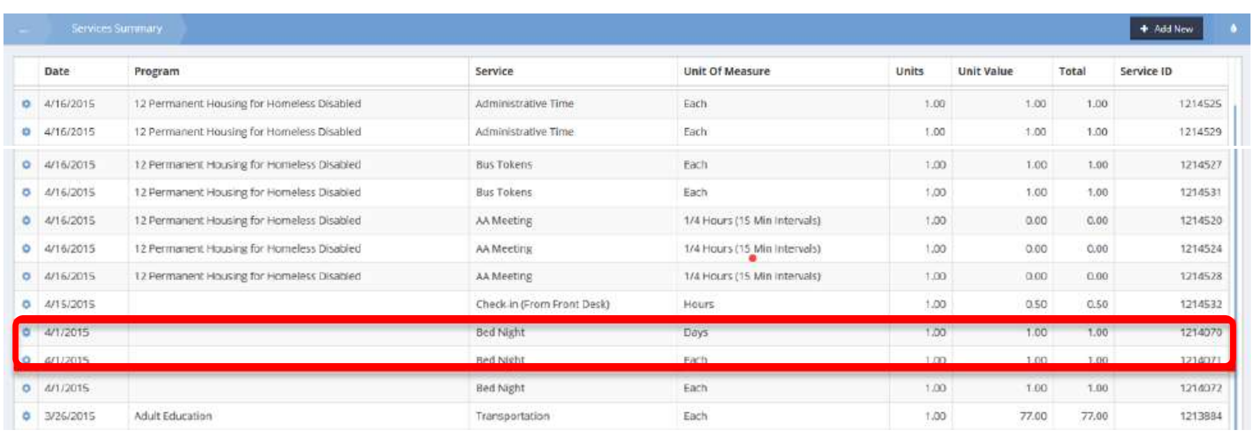
Housing Check-In History

Begin Date - End Date	Usage	Resource	Slot
01/26/2015 - 01/26/2015	Safe Haven Section	Manor Emergency Housing	SHaven Bed 8

Housing Reservations

Begin Date - End Date	Resource	Usage	Slot
04/10/2015 - 12/31/9999	Single Room Occupancy	Two Bedroom5	
01/26/2015 - 01/26/2015	Manor Emergency Housing	Safe Haven Section	SHaven Bed 8

Two bed nights also appear on the Services Summary for the client.



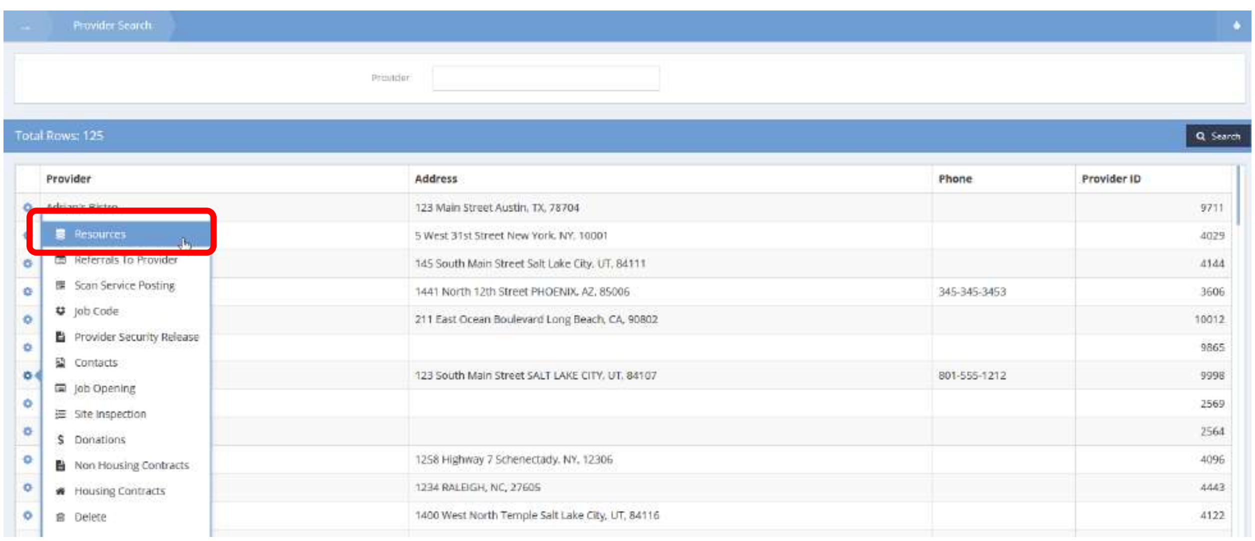
Services Summary

Date	Program	Service	Unit Of Measure	Units	Unit Value	Total	Service ID
4/16/2015	12 Permanent Housing for Homeless Disabled	Administrative Time	Each	1.00	1.00	1.00	1214525
4/16/2015	12 Permanent Housing for Homeless Disabled	Administrative Time	Each	1.00	1.00	1.00	1214529
4/16/2015	12 Permanent Housing for Homeless Disabled	Bus Tokens	Each	1.00	1.00	1.00	1214527
4/16/2015	12 Permanent Housing for Homeless Disabled	Bus Tokens	Each	1.00	1.00	1.00	1214531
4/16/2015	12 Permanent Housing for Homeless Disabled	AA Meeting	1/4 Hours (15 Min Intervals)	1.00	0.00	0.00	1214520
4/16/2015	12 Permanent Housing for Homeless Disabled	AA Meeting	1/4 Hours (15 Min Intervals)	1.00	0.00	0.00	1214524
4/16/2015	12 Permanent Housing for Homeless Disabled	AA Meeting	1/4 Hours (15 Min Intervals)	1.00	0.00	0.00	1214528
4/15/2015		Check-in (From Front Desk)	Hours	1.00	0.50	0.50	1214532
4/1/2015		Bed Night	Days	1.00	1.00	1.00	1214070
4/1/2015		Bed Night	Each	1.00	1.00	1.00	1214071
4/1/2015		Bed Night	Each	1.00	1.00	1.00	1214072
3/26/2015	Adult Education	Transportation	Each	1.00	77.00	77.00	1213884

Excuse Unexcuse Summary New

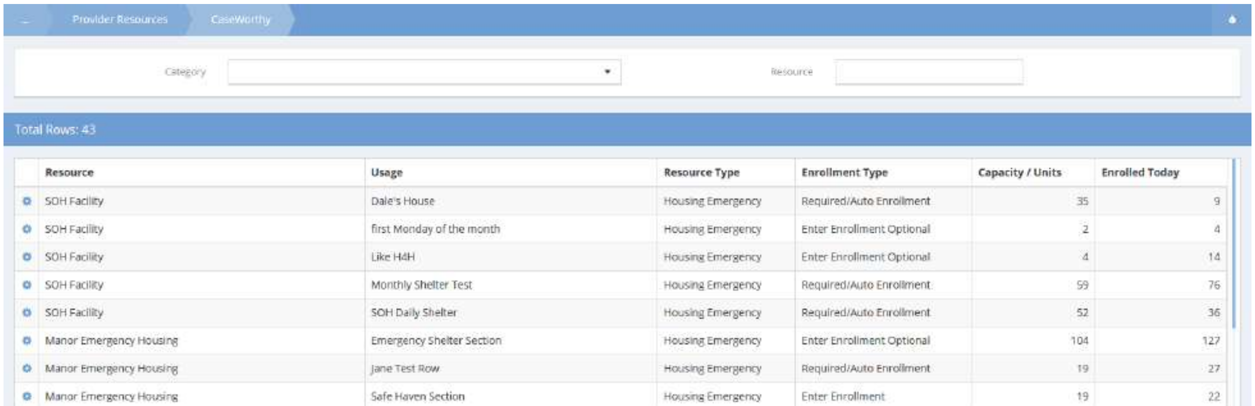
Objective: View or record client absences from housing reservations.

Locate the desired provider and click on the action gear icon associated with it.

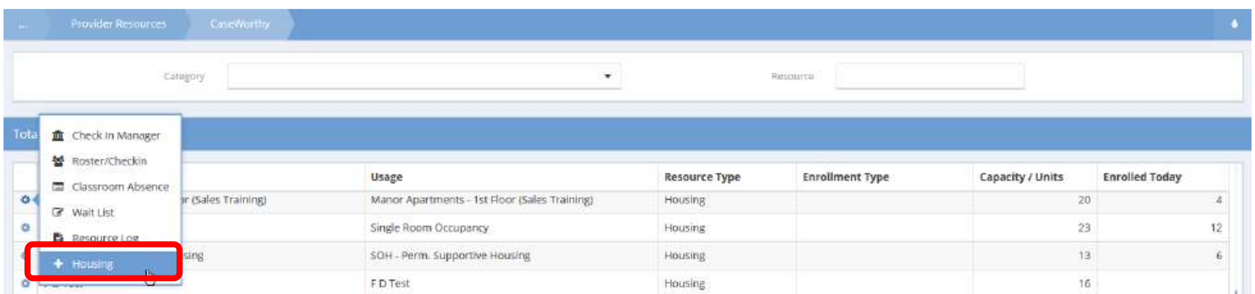


Select Resources from the pop-up menu that appears.

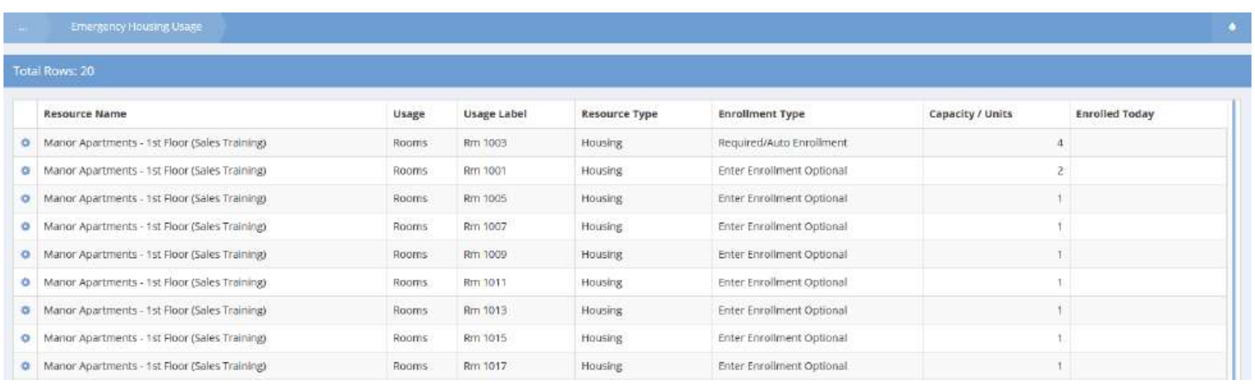
The Provider Resources form displays.



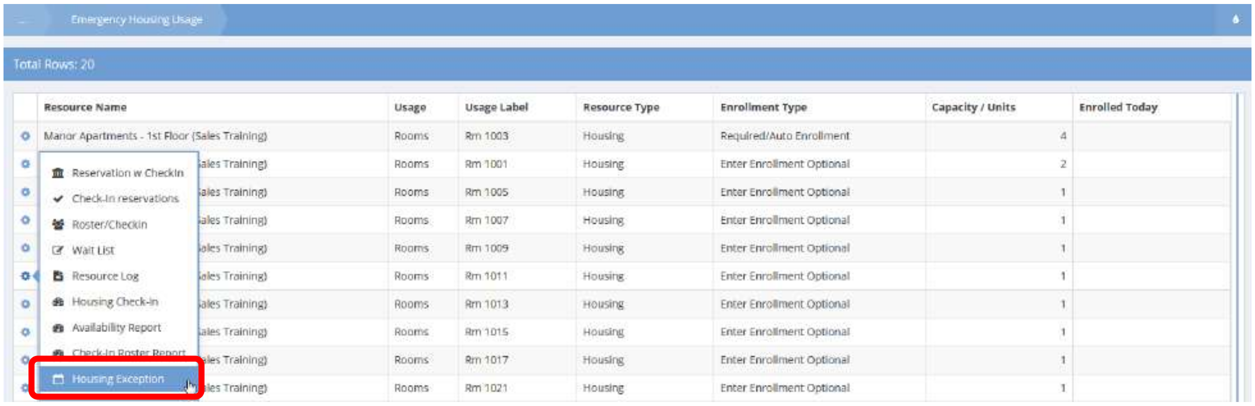
Locate the desired resource and click on the action gear icon associated with it.



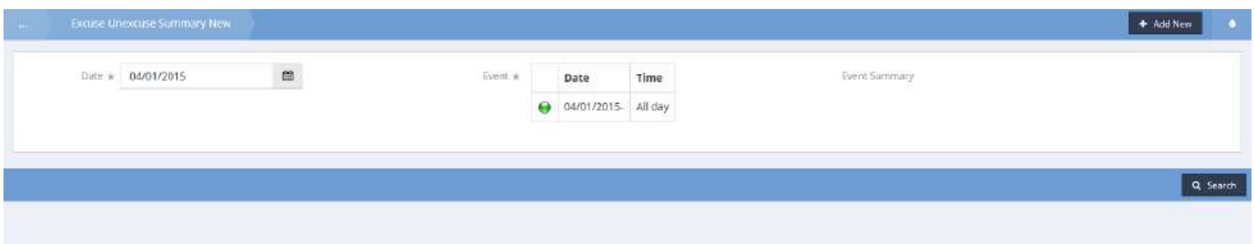
Select Housing from the pop-up menu that appears. The Emergency Housing Usage form displays.



Locate the desired Resource Name and click on the action gear associated with it.

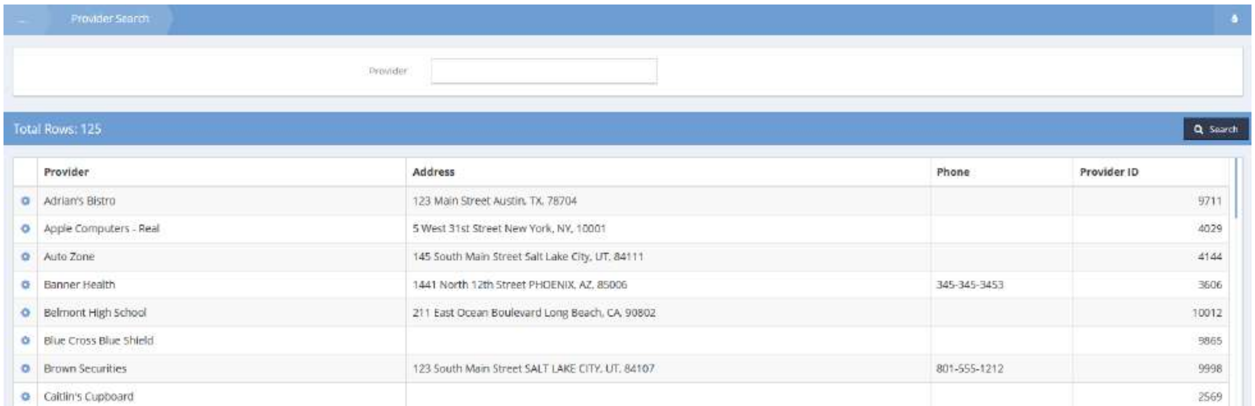


Select Housing Exception from the pop-up menu that appears. The Excuse Unexcuse Summary New form displays. From this form, add or edit absences.

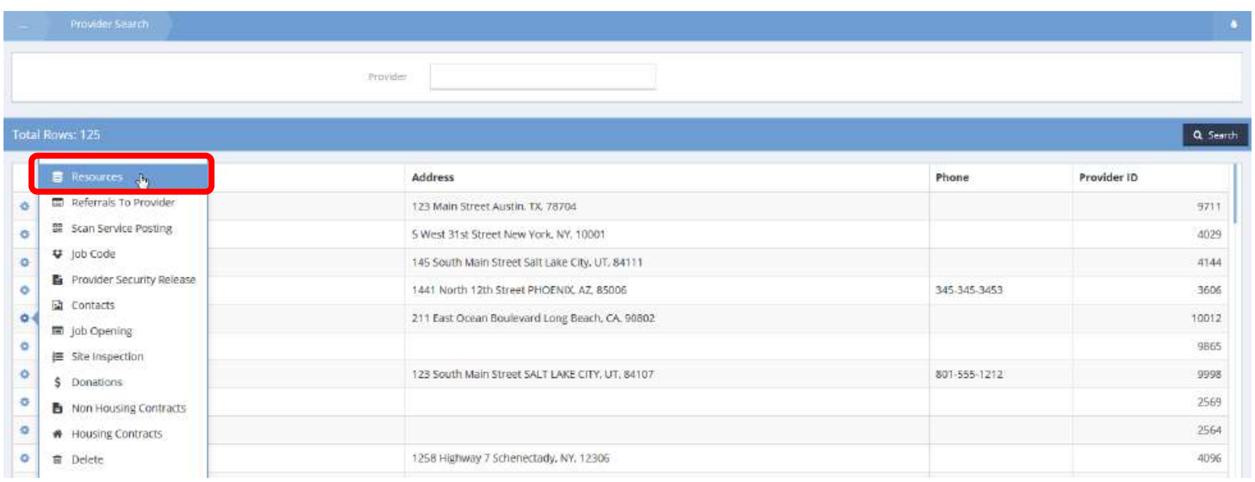


Housing Exception

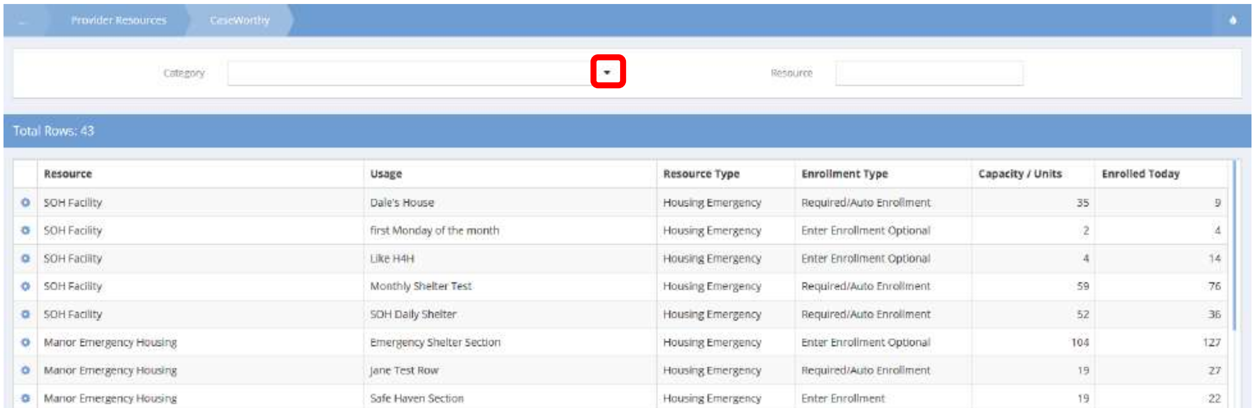
Objective: Reduce the number of days in housing based on excused absences by recording a negative service for the number of days the client is excused from housing.



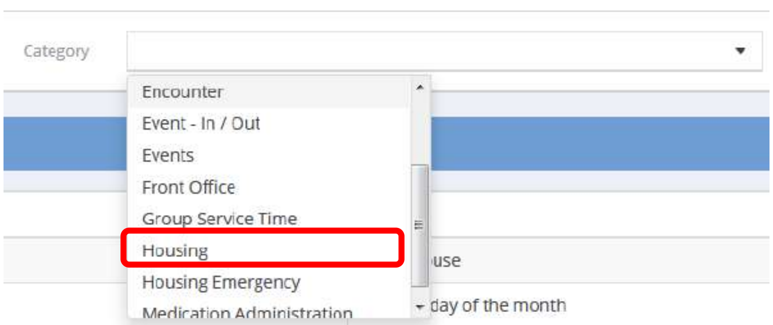
Select Resources from the pop-up menu when the action gear icon to the left of the desired provider is clicked.



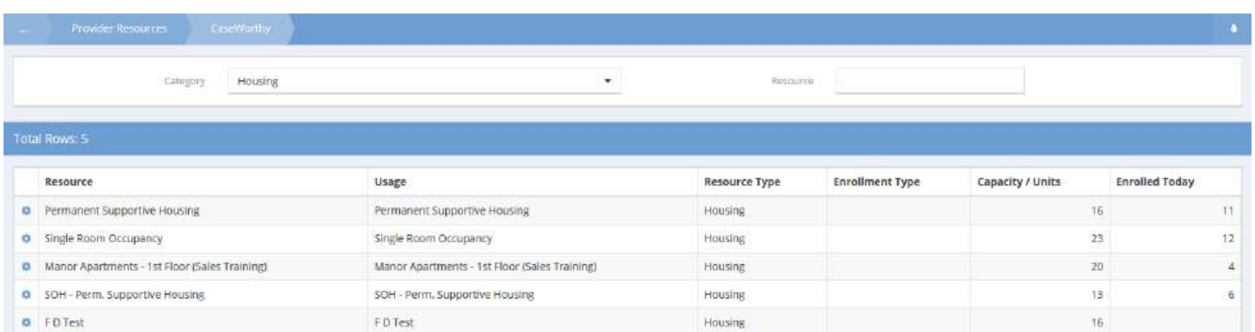
The Provider Resources form displays.



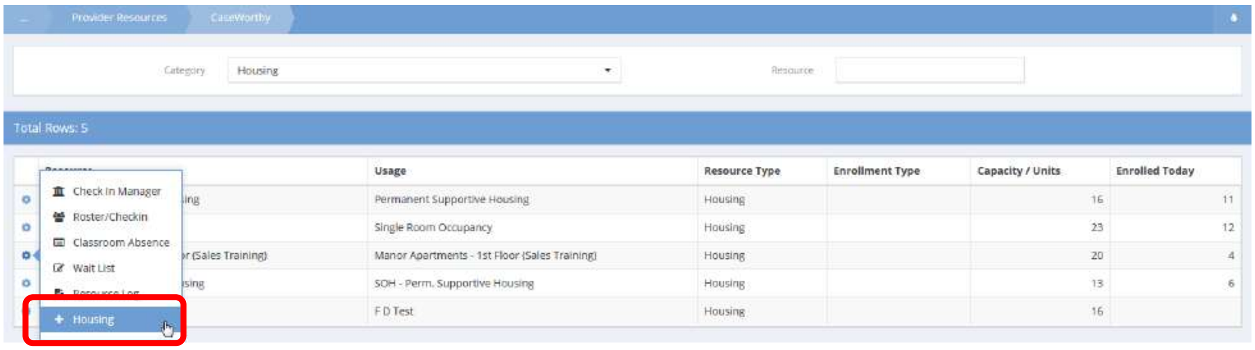
Select Housing from the drop-down list accessed by clicking on the down arrow at the far right of the Category field.



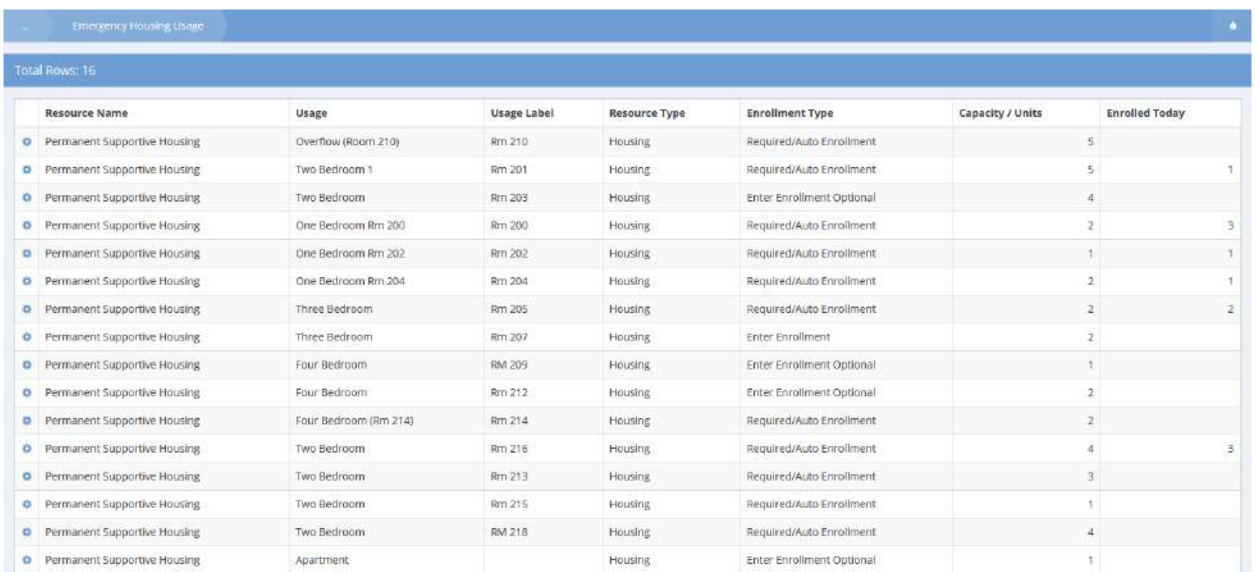
The filtered resource list displays on the Provider Resources form.



Click on the action gear to the left of the desired resource. Select “Housing” from the pop-up menu that displays.



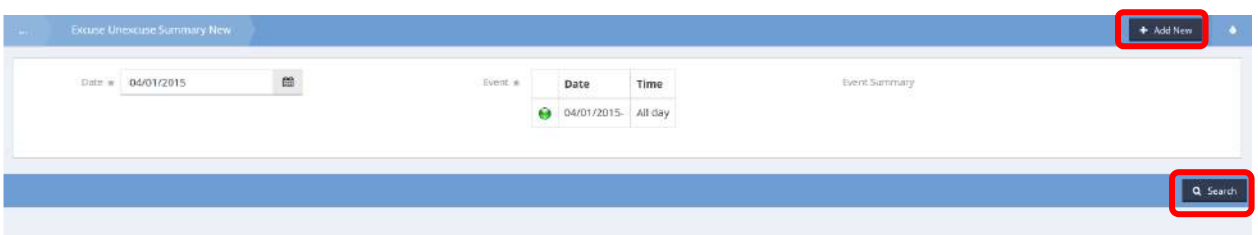
The Emergency Housing Usage form appears.



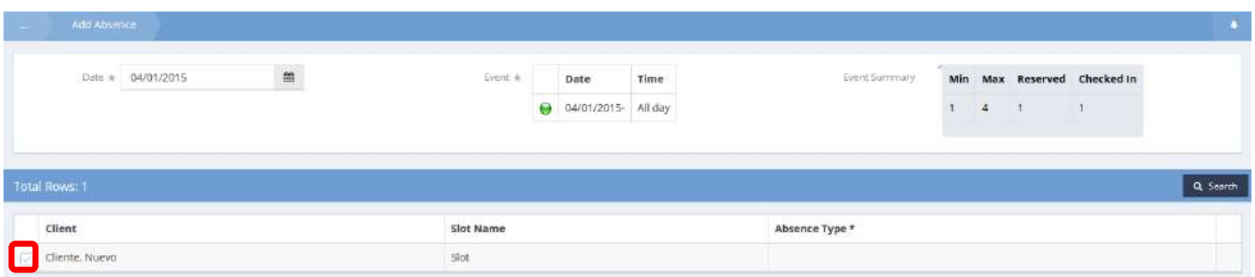
Resource Name	Usage	Usage Label	Resource Type	Enrollment Type	Capacity / Units	Enrolled Today
Permanent Supportive Housing	Overflow (Room 210)	Rm 210	Housing	Required/Auto Enrollment	5	
Permanent Supportive Housing	Two Bedroom 1	Rm 201	Housing	Required/Auto Enrollment	5	1
Permanent Supportive Housing	Two Bedroom	Rm 203	Housing	Enter Enrollment Optional	4	
Permanent Supportive Housing	One Bedroom Rm 200	Rm 200	Housing	Required/Auto Enrollment	2	3
Permanent Supportive Housing	One Bedroom Rm 202	Rm 202	Housing	Required/Auto Enrollment	1	1
Permanent Supportive Housing	One Bedroom Rm 204	Rm 204	Housing	Required/Auto Enrollment	2	1
Permanent Supportive Housing	Three Bedroom	Rm 205	Housing	Required/Auto Enrollment	2	2
Permanent Supportive Housing	Three Bedroom	Rm 207	Housing	Enter Enrollment	2	
Permanent Supportive Housing	Four Bedroom	RM 209	Housing	Enter Enrollment Optional	1	
Permanent Supportive Housing	Four Bedroom	Rm 212	Housing	Enter Enrollment Optional	2	
Permanent Supportive Housing	Four Bedroom (Rm 214)	Rm 214	Housing	Required/Auto Enrollment	2	
Permanent Supportive Housing	Two Bedroom	Rm 216	Housing	Required/Auto Enrollment	4	3
Permanent Supportive Housing	Two Bedroom	Rm 213	Housing	Required/Auto Enrollment	3	
Permanent Supportive Housing	Two Bedroom	Rm 215	Housing	Required/Auto Enrollment	1	
Permanent Supportive Housing	Two Bedroom	RM 218	Housing	Required/Auto Enrollment	4	
Permanent Supportive Housing	Apartment		Housing	Enter Enrollment Optional	1	

Click on the action gear to the left of the desired resource usage. Select "Housing Exception" from the pop-up menu that displays.

The Excuse Unexcuse Summary New form displays.

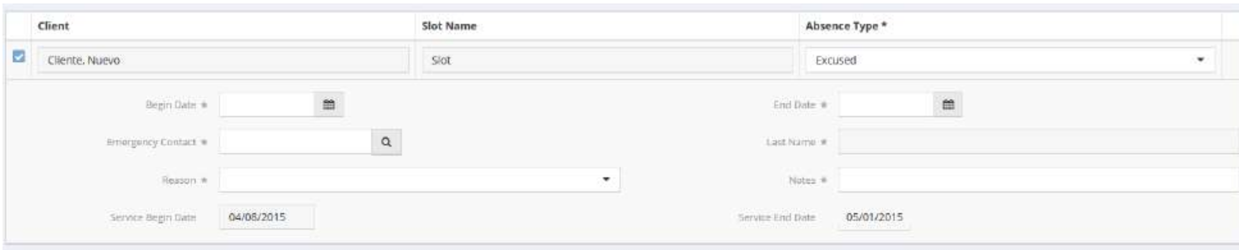


Click on the **+ Add New** button, then Click on the **Search** button. A list of reservations displays.

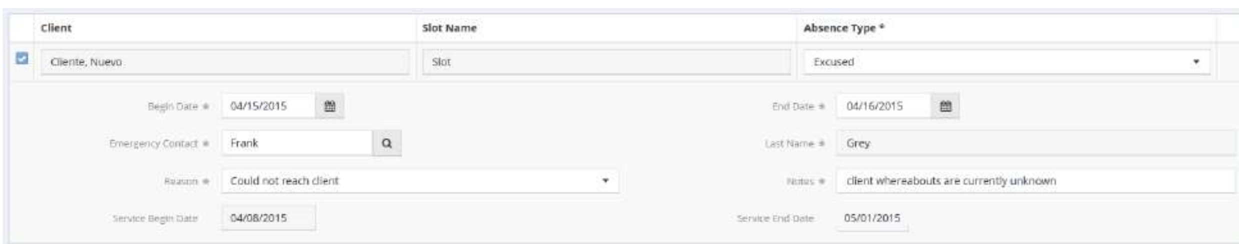


Select the desired reservation and click on the clear checkbox to the left of the name.

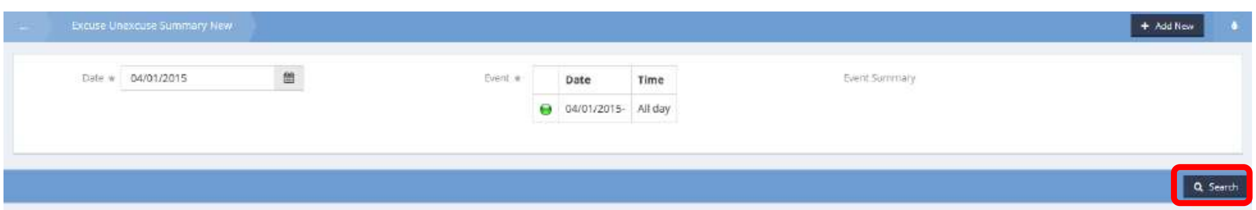
The row expands to allow absence entry.



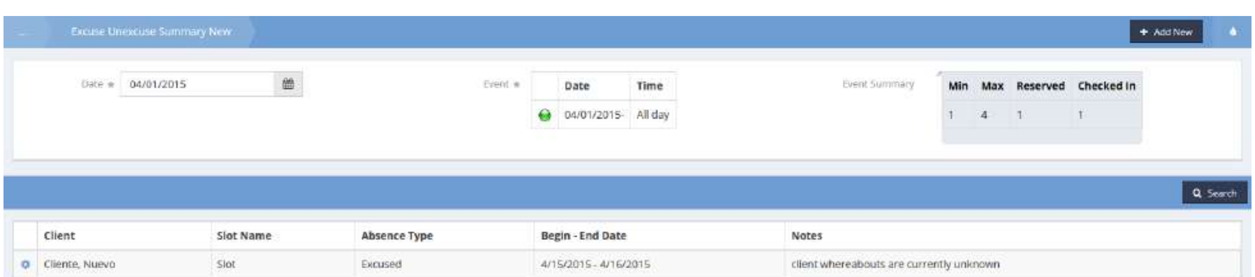
The absence type defaults to Excused but can be altered if required. Enter the begin and end dates for the absence, the emergency contact, the reason for the absence and notes.



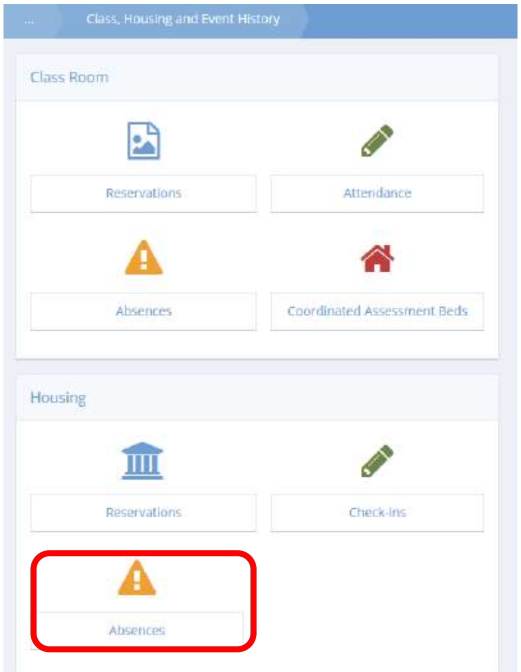
Click on the Save button. The summary form returns.



Click the Search button. The absence now appears in the list.



Navigate to Case Management>Client Information>Class and Housing History.



Click on the Absences icon under Housing to verify the absence was recorded. The Client Absence form displays.


Client Absence

Total Rows: 1

Begin - End Dates	Resource	Usage Name	Absence Type	Absence Reason
4/15/2015 - 4/16/2015	Permanent Supportive Housing	Two Bedroom	Excused	Could not reach client

The absence was also recorded in the Services Summary. Navigate to Case Management>Case Management>Services. The service record for the absence has a negative unit value.

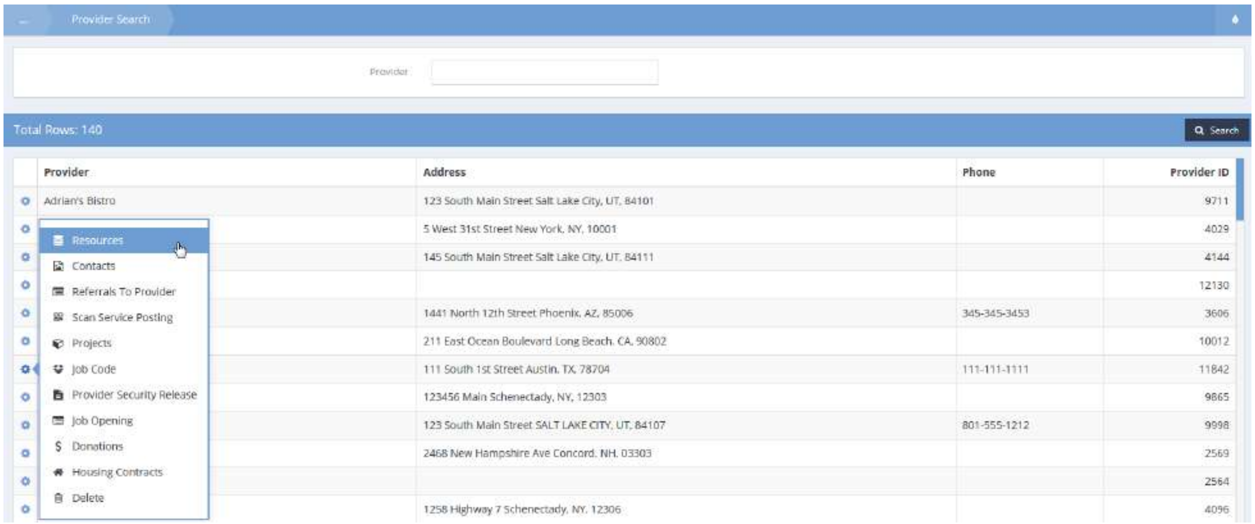

Services Summary

Date	Program	Service	Unit Of Measure	Units	Unit Value	Total	Service ID
4/15/2015	12 Permanent Housing for Homeless Disabled	Bed Night	Days	-1.00	1.00	-1.00	1214533
4/8/2015	12 Permanent Housing for Homeless Disabled	Bed Night	Each	23.00	1.00	23.00	1214317
2/23/2015		AA Meeting	1/4 Hours (15 Min Intervals)	1.00	0.00	0.00	1212977
1/22/2015		Employment Skills Training	Days	1.00	1.00	1.00	1212140
1/15/2015		AA Meeting	Days	0.00	1.00	0.00	1211937

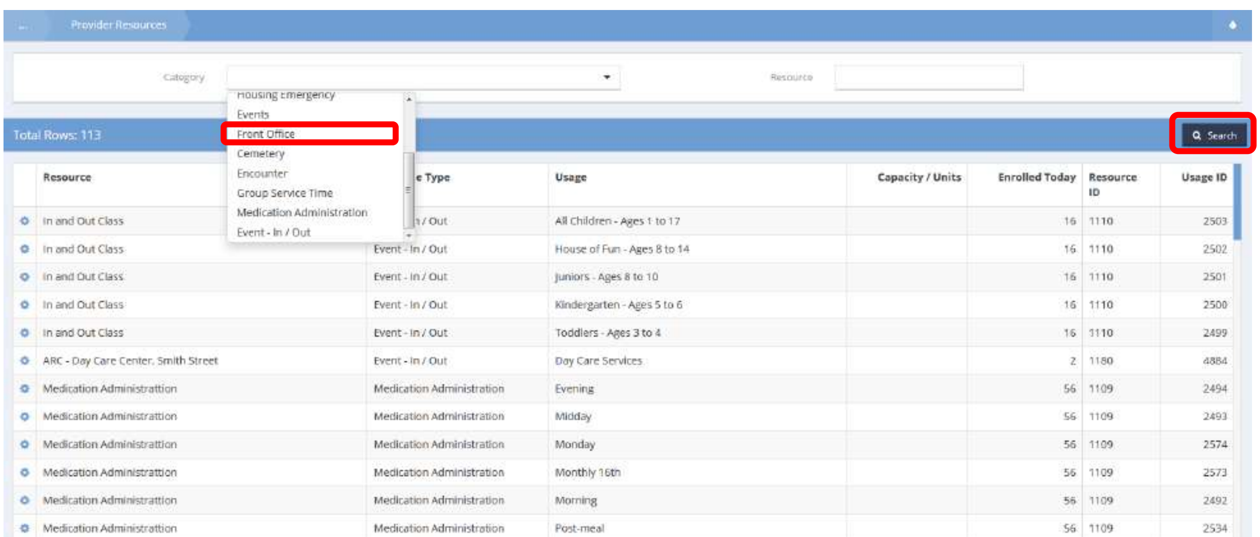
Front Desk – Quick Add Client

Objective: Add new client within front desk wait list.

Navigation: Organization>Providers>Providers

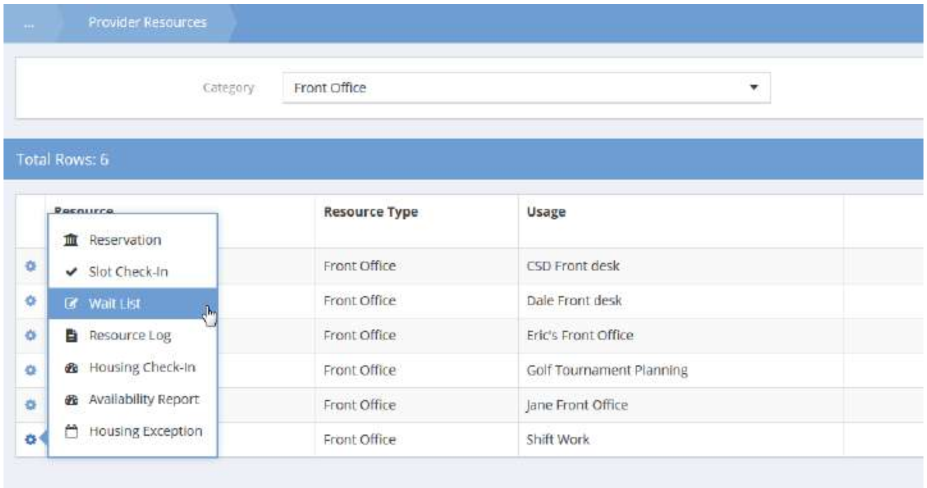


Locate the desired provider, click the action gear and click Resources. The Provider Resources form displays.

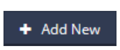


Select Front Office from the Category drop-down list and click the Search button.

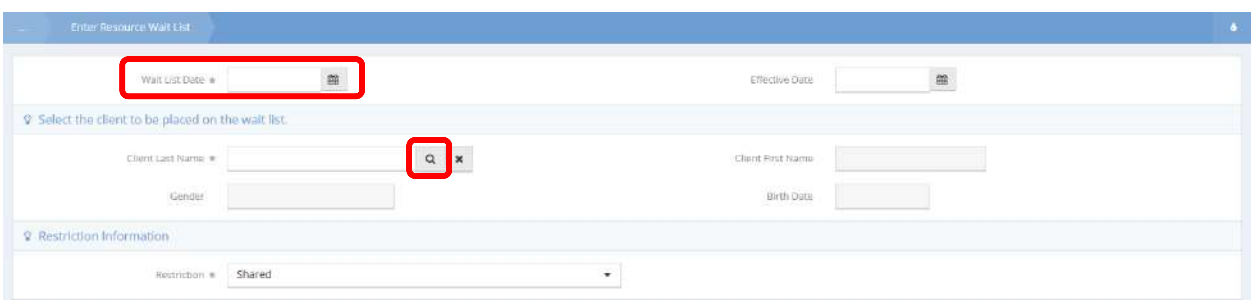
The list filters for Front Office resources.



On the desired resource, click the action gear  and click Wait List. The Usage Wait List form displays.

Click the 

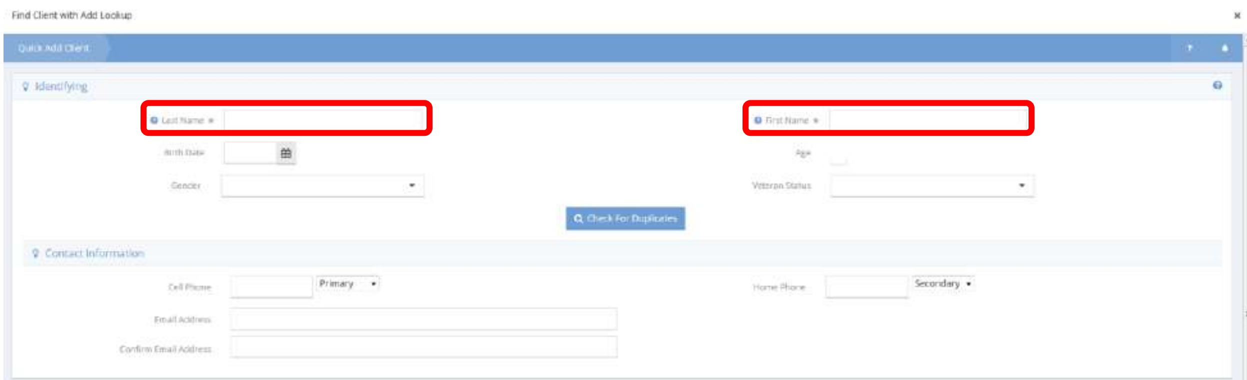
button. The Enter Resource Wait List form displays.



Select a date and click the magnifying glass lookup  icon.

The Find Client with Add form displays.

Click the New Client button. The Quick Add Client form displays.



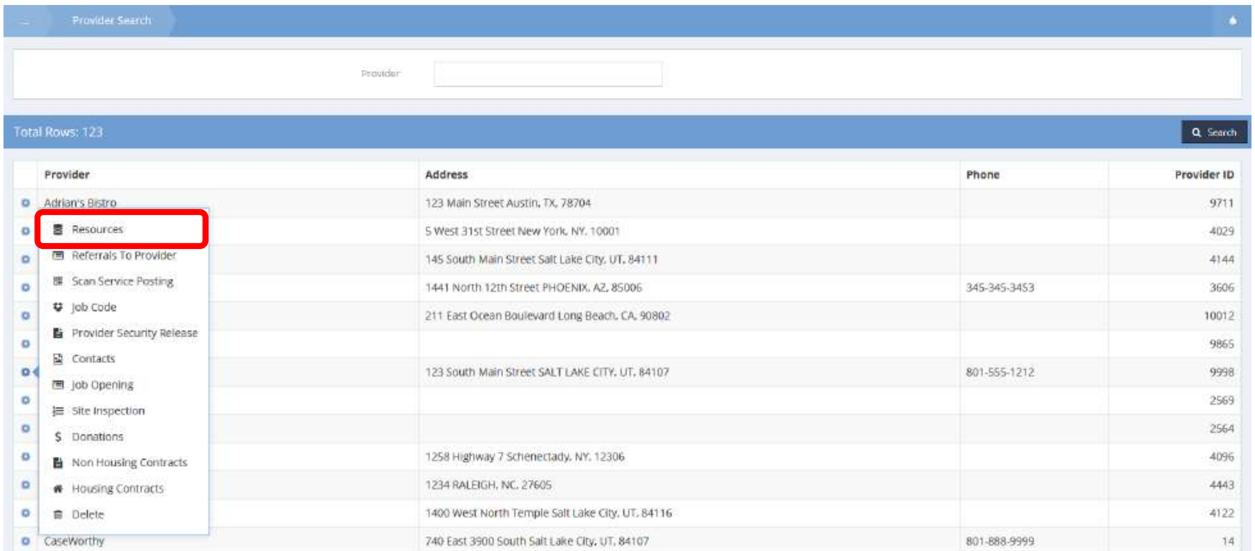
Enter a last name, first name, and any other available info. Click the Check For Duplicates button.

Name	SSN	Birth Date	Alias	FamilyName	OldFamilyID	Column1
	XXX-XX-0927	01/01/1999		assmtcrash,newman-1977-01-01	951	
1test, child	333-33-3111	01/01/2005		1test,family-1990-01-01	11711	
1test, familywife	333-33-3333	01/02/1990		1test,family-1990-01-01	11711	
2test, family	333-33-3333	01/01/1995		2test,family-1995-01-01	11713	
2test, family	333-33-3333	01/01/1995		2test,family-1995-01-01	11714	
2test, family	333-33-3333	01/01/1995		2test,family-1995-01-01	11734	
3test, family	111-11-1111	01/01/1990		3test,family-1990-01-01	11715	
3test, family	111-11-1111	01/01/1990		3test,family-1990-01-01	11716	
3test, family	111-11-1111	01/01/1990		3test,family-1990-01-01	11735	

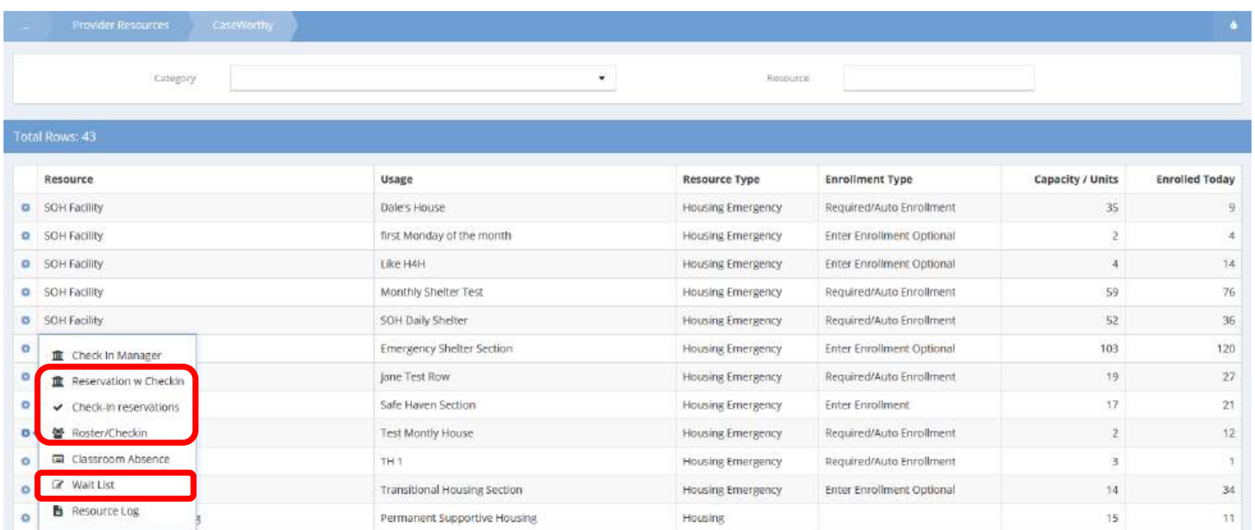
If this is a new client, click the This is a new client button. Otherwise, select the client's name from the results. Click Save when finished. Click Save on the Enter Resource Wait List form. The client has now been added to the wait list.

Resources

From the action gear icon, select the "Resources" option to view resources associated with the provider.

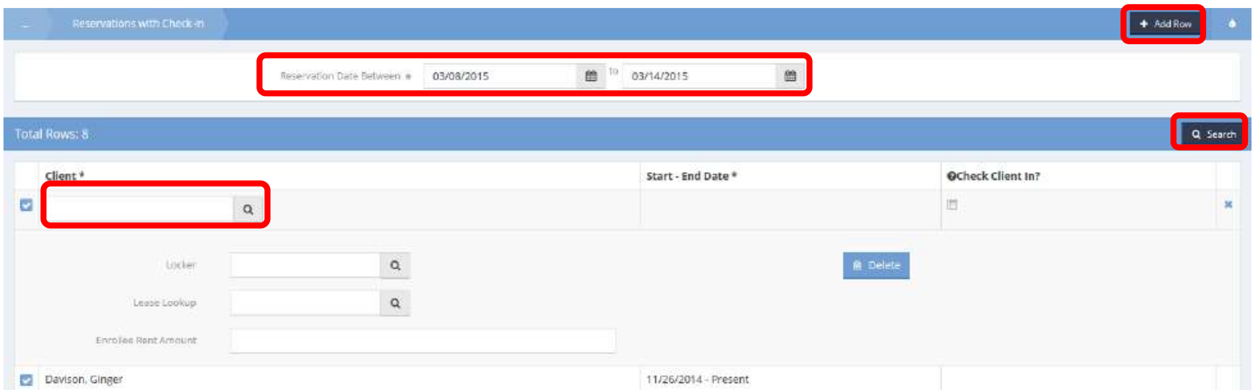


From the resource action gear icon, a spot can be reserved for a client in one of the various usages (typically housing or classes). It is also possible to check-in a reservation, or place a client on a wait list for a spot. To check-in a client who doesn't have a previous reservation, use the "Roster/Check-in" option.

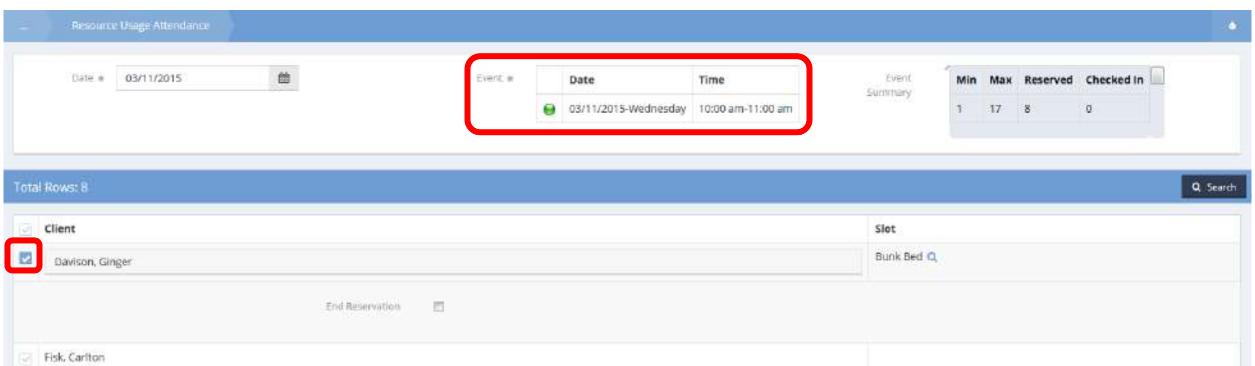


Reservation with Check-in: Select a start and end date for the reservation and click **Search** then click **+ Add Row** to reserve a client. Find a client using the client lookup. Click the checkbox for Check Client In if desired to check the client in at the same time.

Add a locker, attach a lease, and enter an enrollee rent amount.



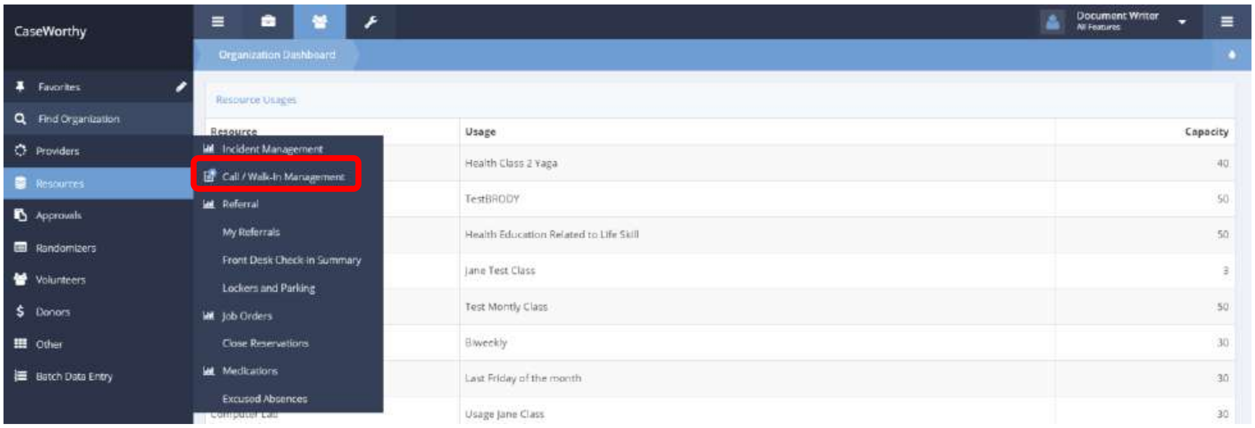
Check-in Reservations: Select the event date, then choose the client in need of check-in.



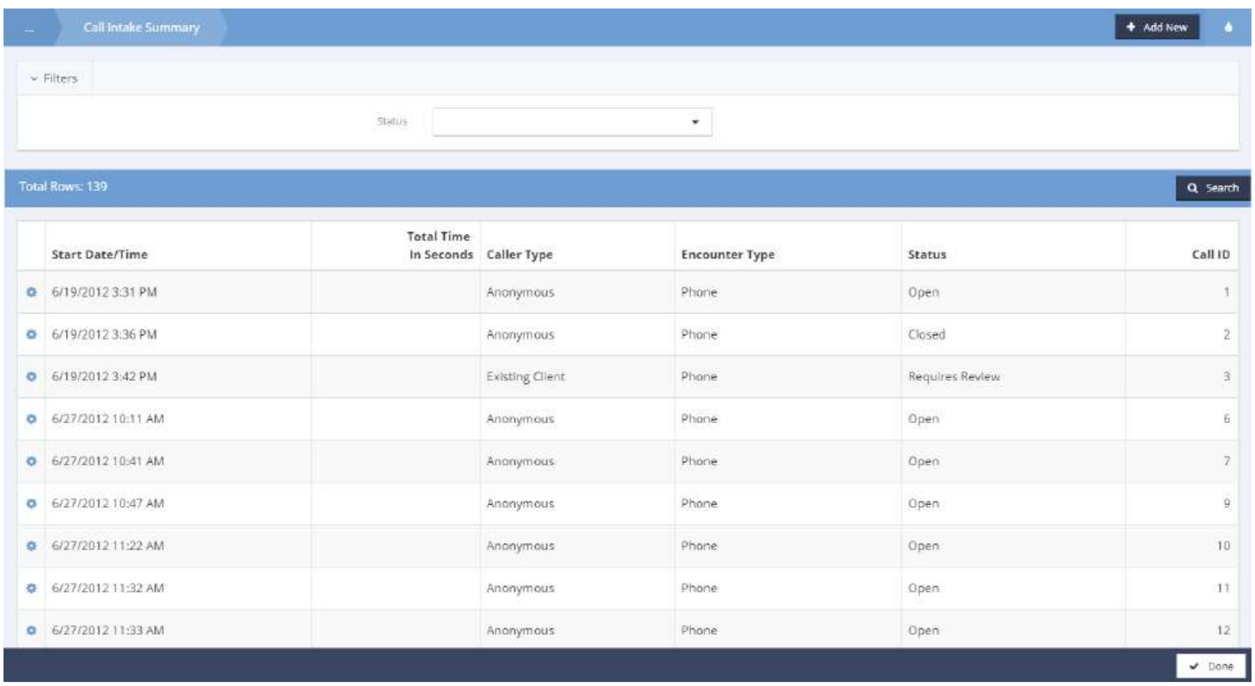
Call Center (Add) New

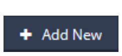
Objective: Record time and keep track of calls.

Navigation: Organization>Resources>Call / Walk-In Management>Add New

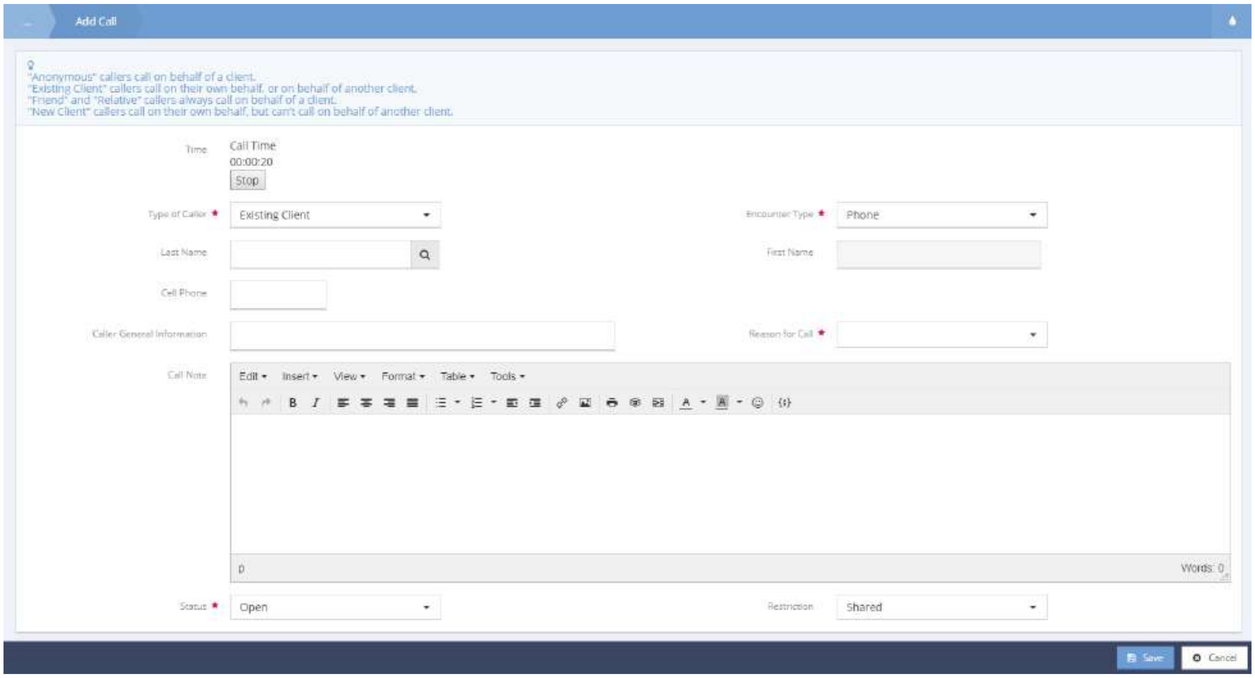


Under the Organization tab, select Resources. Click on Call / Walk-In Management from the pop-up menu that appears. The Call Intake Summary form appears.



Click the 

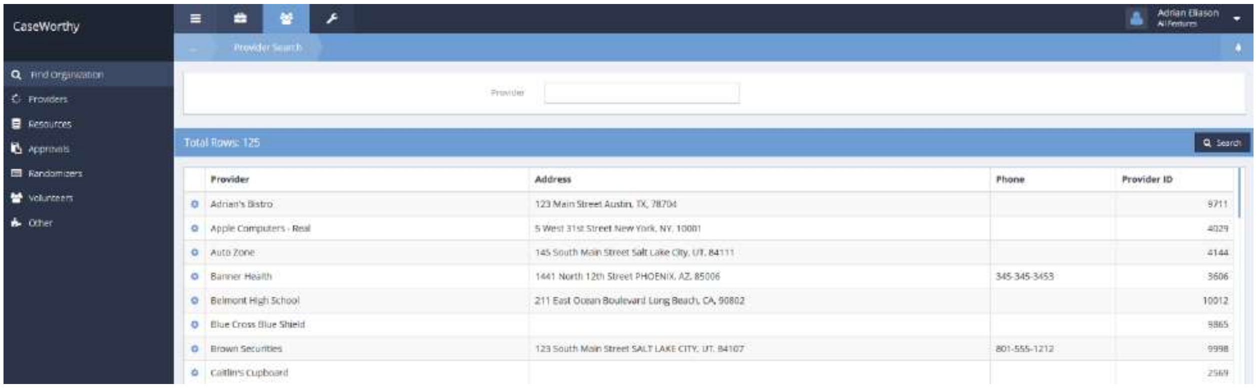
button to add a new call.
The Add Call form appears.



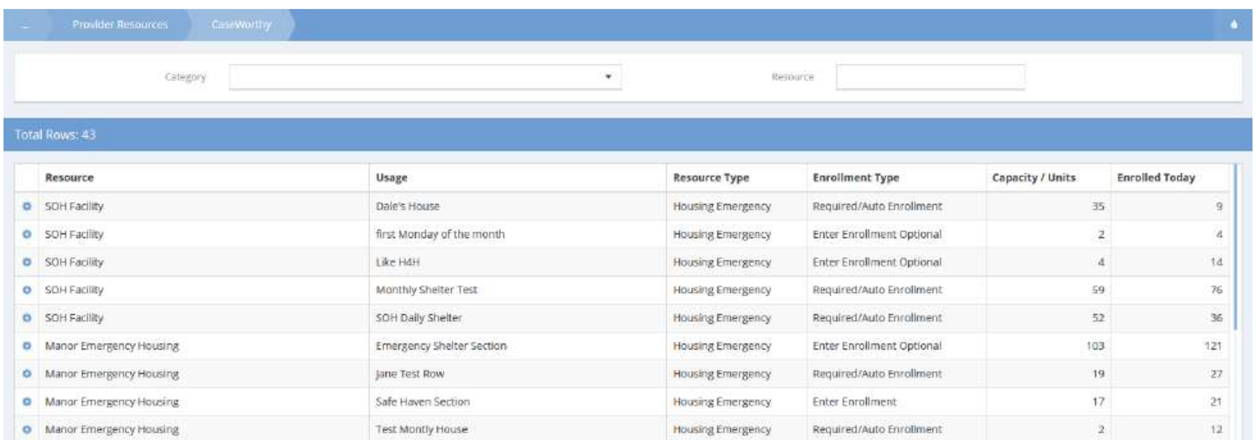
The call time begins upon opening the form. When the call is over, click the stop button. Fill in the rest of the information using the drop-down menus and entering any relevant text into the Call note text box. Click the Save button to save and close the form.

Check In Manager

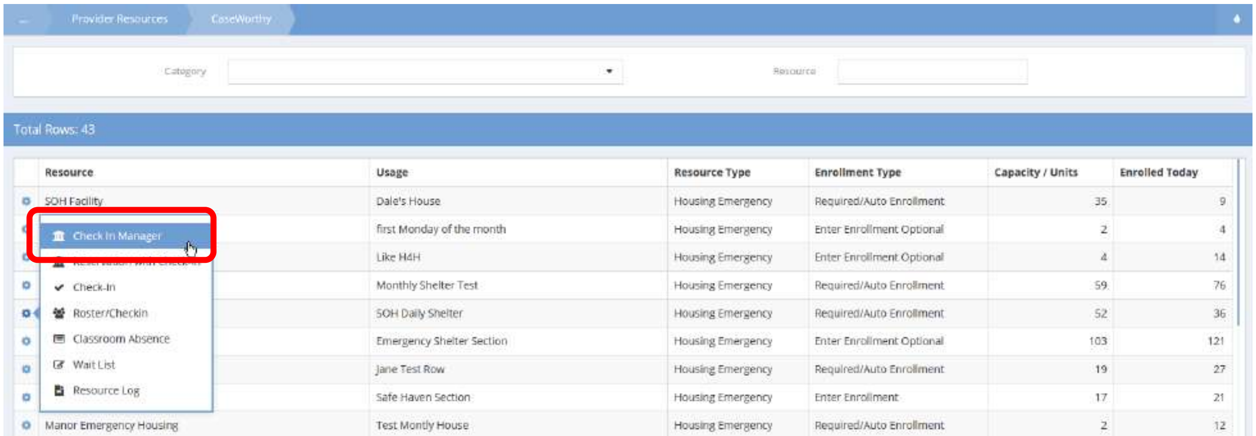
Objective: Reserve, check-in, check-out, show an absence or change the location for clients within a user friendly graphical representation of resources.



Select desired Provider from the Provider Search list and click on the action gear icon to its left. Select Resources from the action gear drop-down menu. The Provider Resources form displays a list of resources. Select the desired resource and click the action gear icon to the left of the resource.

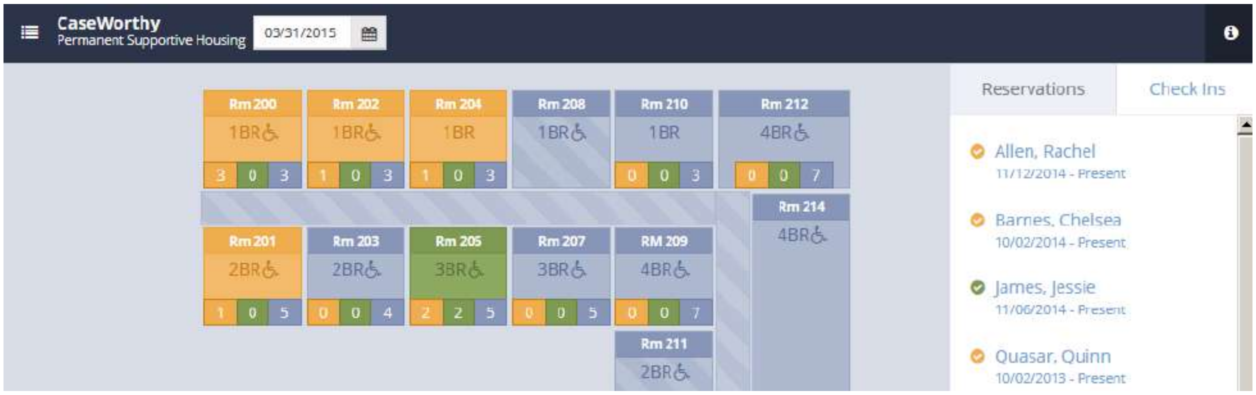


Select Check-In Manager from action gear drop-down menu.



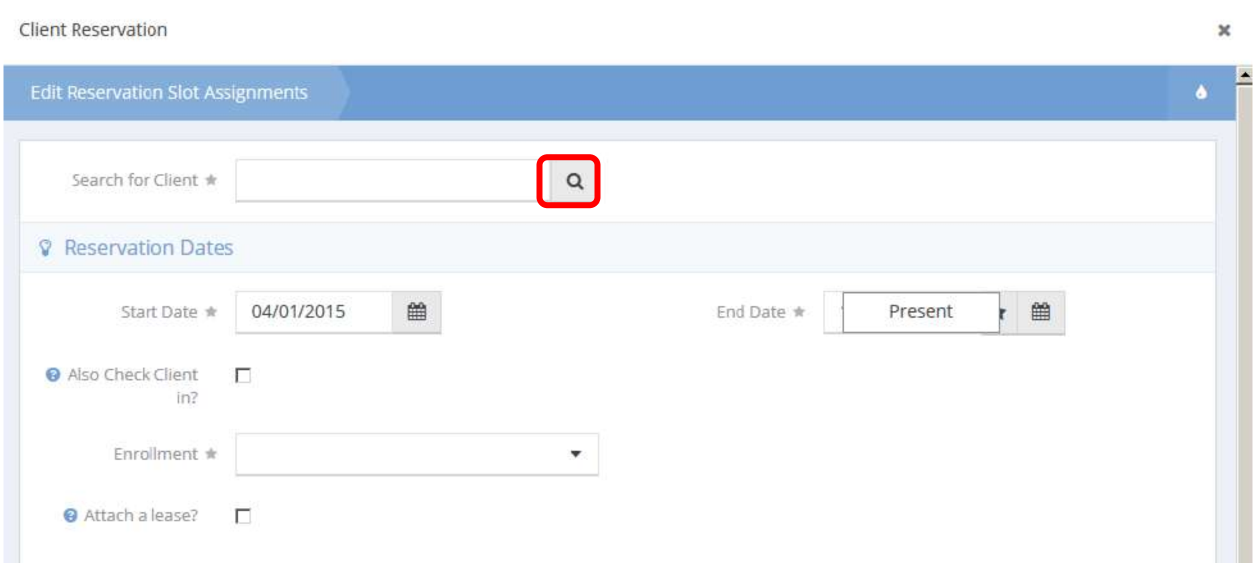
The graphic display of the resource appears. Although not dimensionally exact, the graphic display does represent the physical layout of the resource. In the example, a permanent housing resource with rooms or apartments on either side of a hallway.

Clicking on the Information icon on the upper right of the form displays a panel that slides out from the right edge of the window that includes the clients with reservations and those that are checked in.



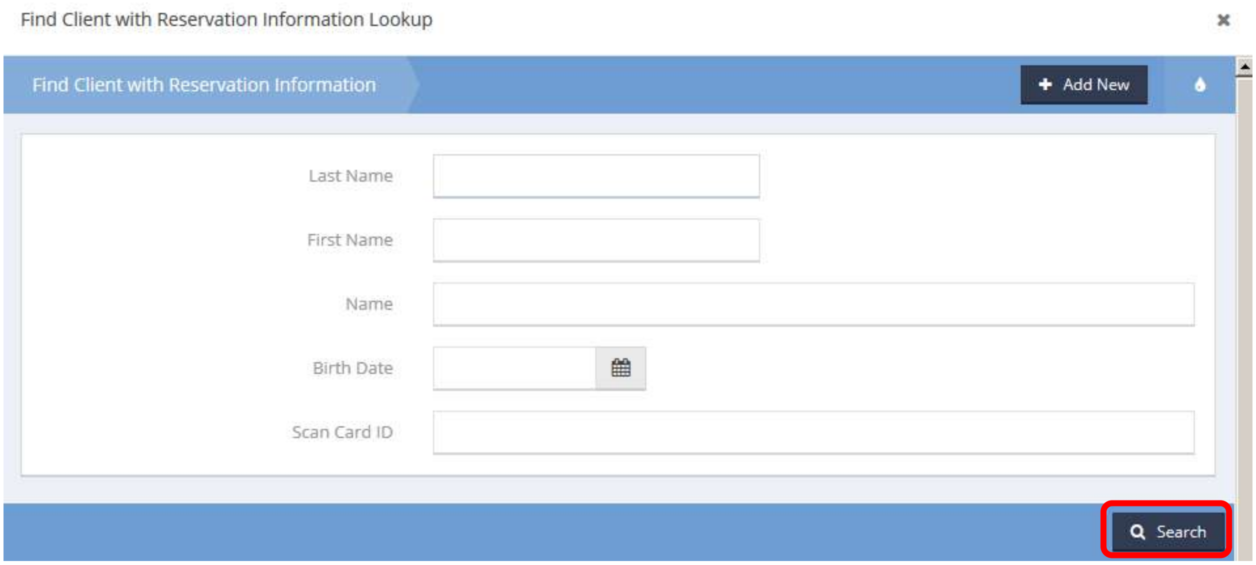
Client Reservation

Select an available bed for the client and click on it. Click on Client Reservation from the pop-up menu. The Client Reservation form displays.

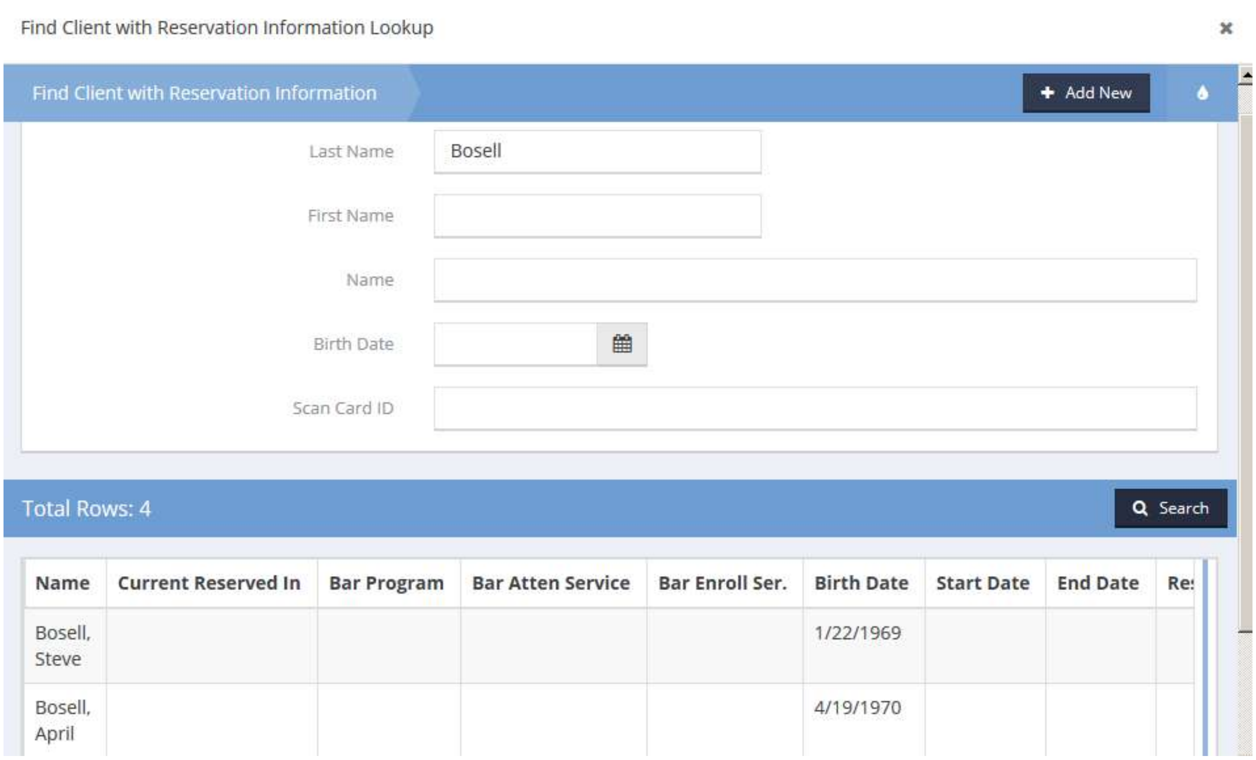


Click on the magnifying glass icon to search for the desired client.

The Search for Client Lookup form displays.

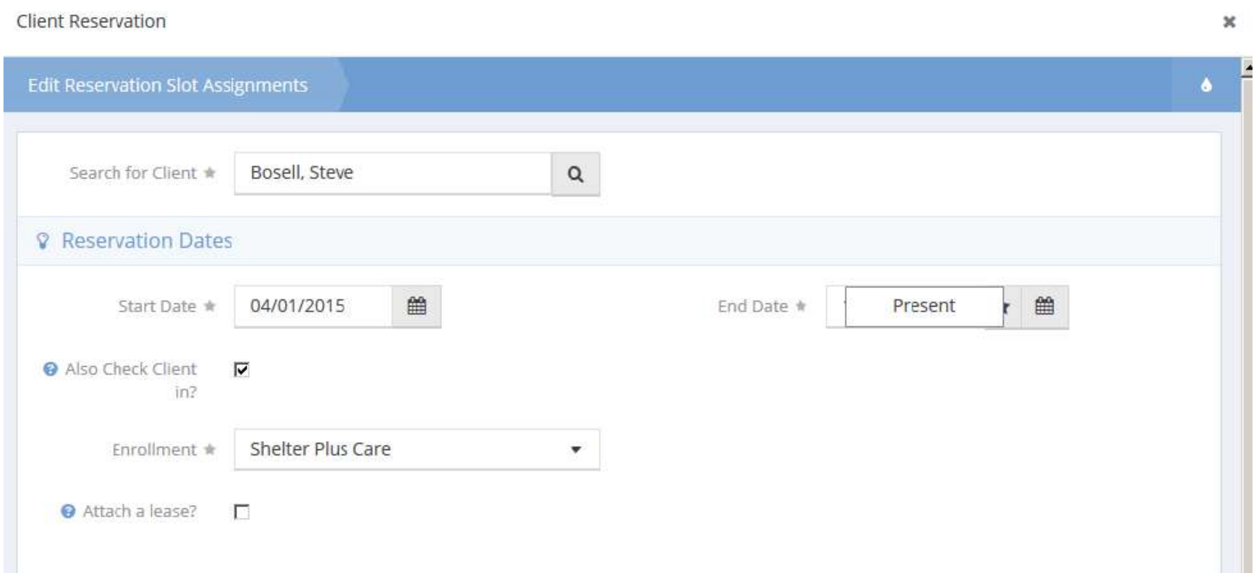


Enter any or all of the desired client name and click on the Search button. The filtered list appears.

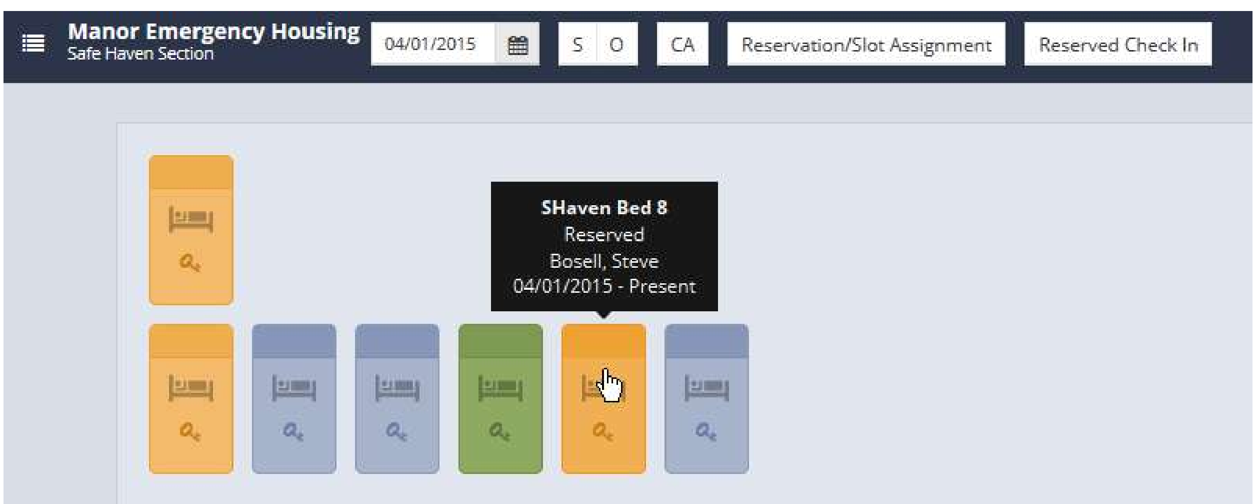


Select the desired client by clicking on the row.

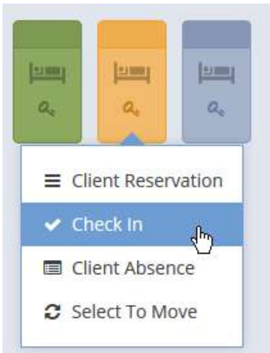
Enter the range of dates for the reservation. Select the program enrollment from the drop-down list and if desired, check-in the client and attach a lease by checking the check boxes.



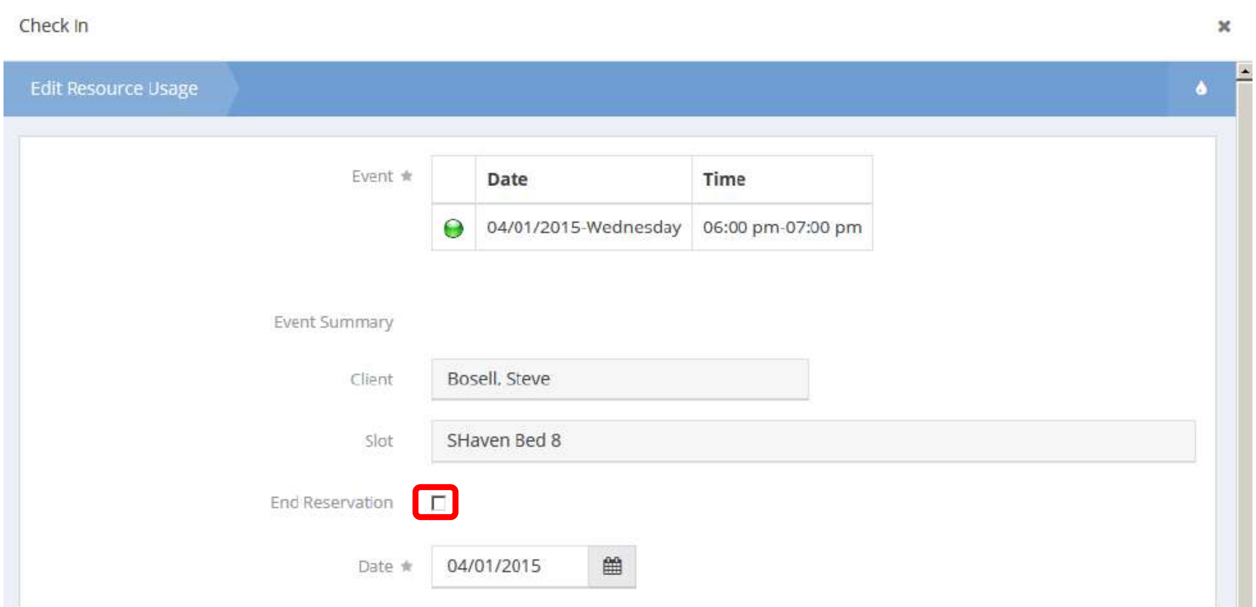
Click on the Save button. The Check-in Manager form displays. Click on the Refresh button. The reservation appears on the form.



To check a client in, click on the bed icon and select Check-In from the pop up menu.



The Check-In form displays. If this is the last day for the client's reservation, or if the client is leaving the shelter tomorrow, check the End Reservation check box.

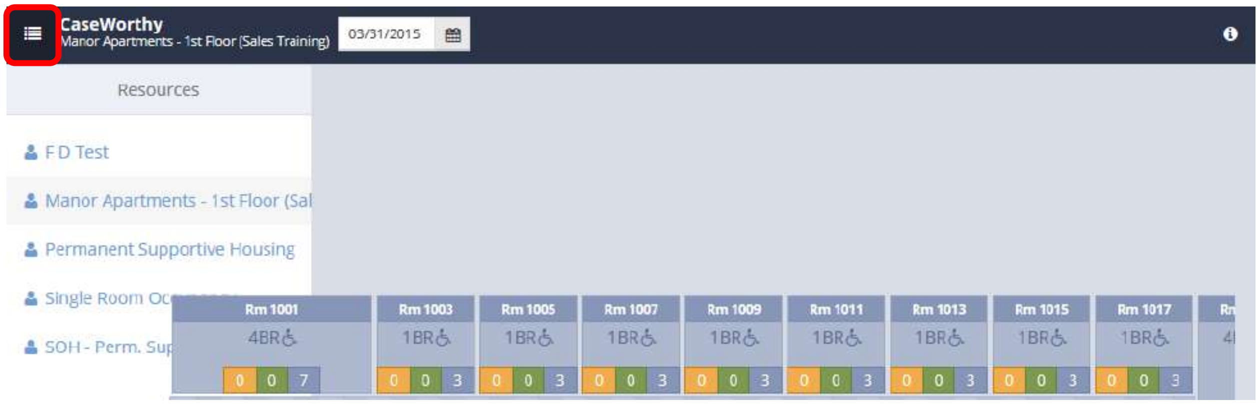


Click on the 

button.

Check in a client by clicking on the orange check mark circle next to the client name.

Selecting the tabular data icon on the upper left of the form displays related resources.

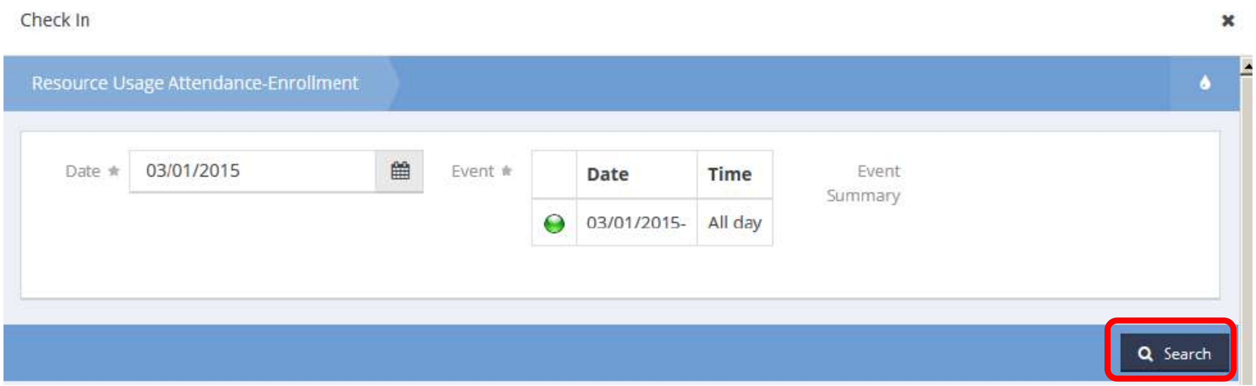


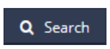
Hovering over a yellow (reservation), green (checked-in) or blue (capacity) numbered box in a "room" brings up a pop-up window with the client name(s) related to that condition for that room.

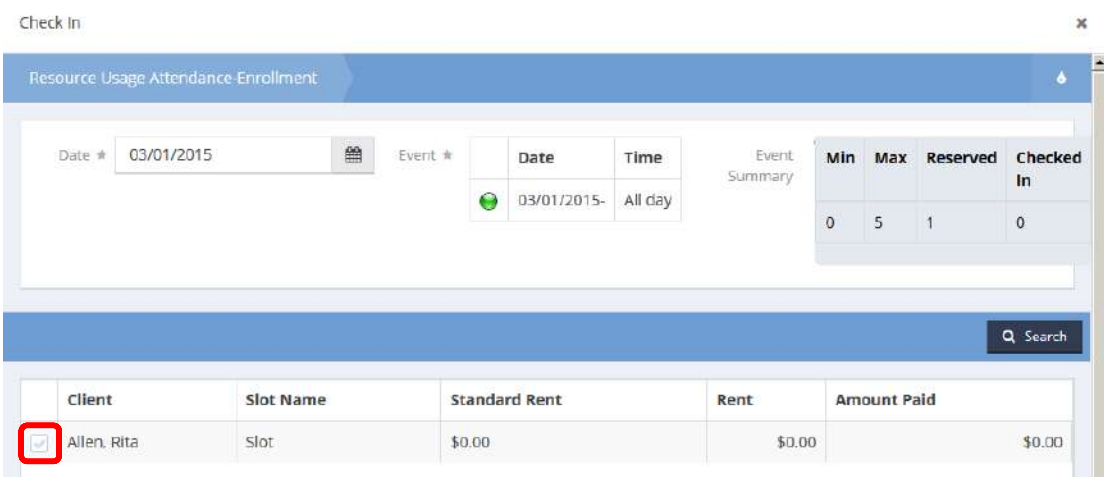
Clicking on a room causes a pop-up menu to display providing options to manage the room reservations and check-ins. If no client is checked in, Check In is one of the options.

Client Check-In

To check in a client, click on the room graphic and select Check In from the menu. The Check In form displays.



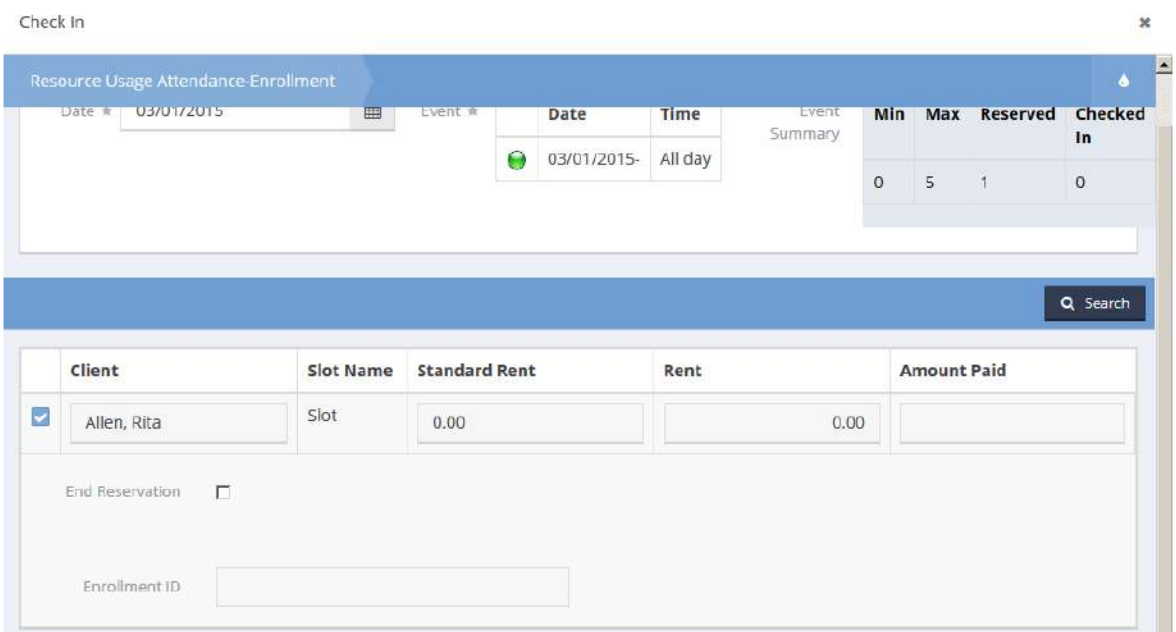
Click on the  button. The clients with reservations for the room display.



Click on the clear checkbox next to the client checking in.

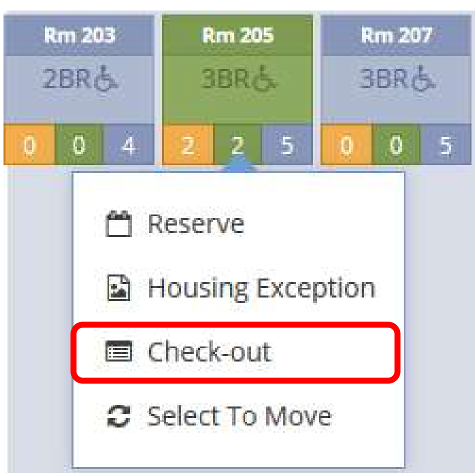
Click on the 

button in the lower right corner of the form.



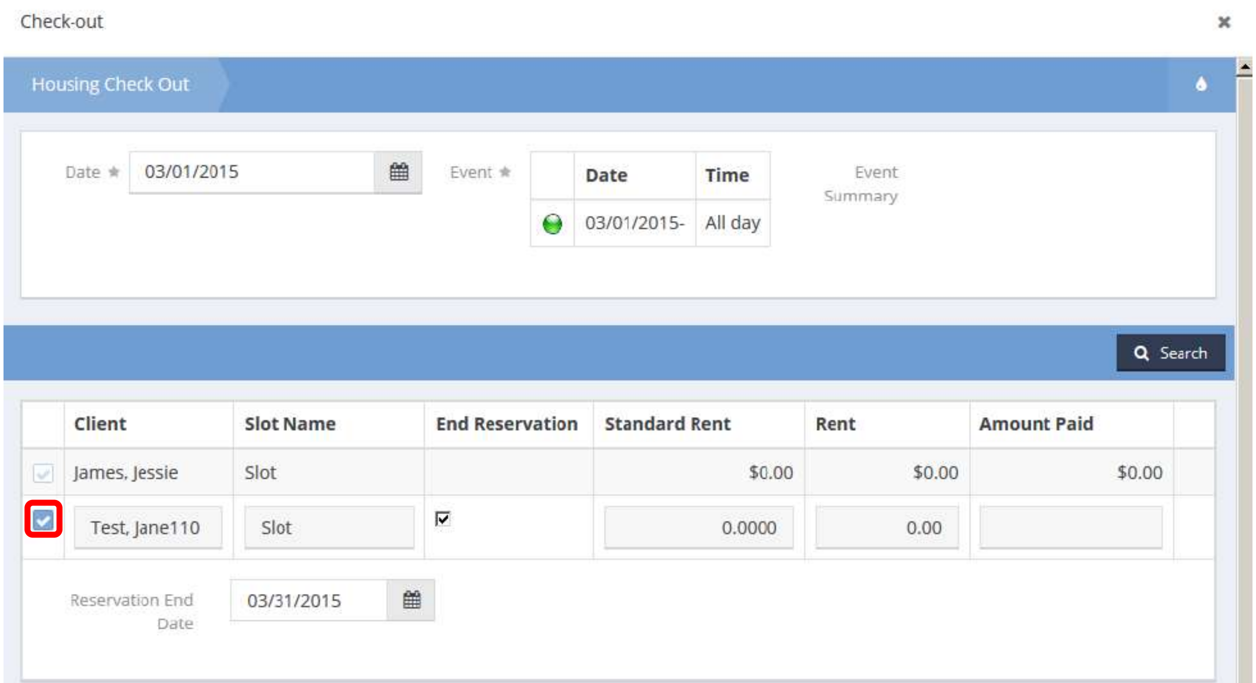
Client Check Out

If the client is already checked in, Check Out is one of the menu options.



To check out a client, select the Check Out option by clicking on it.

The Check-out form displays.

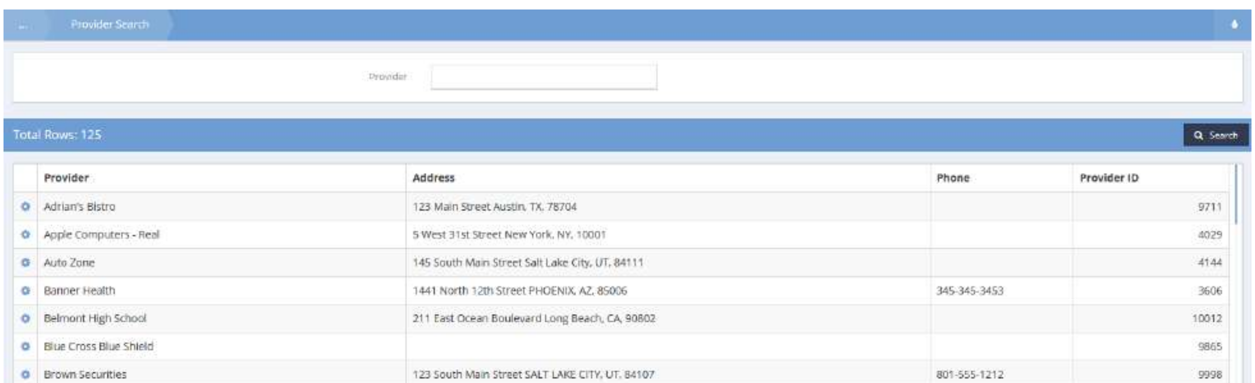


Click on the clear checkbox next to the client checking out. By default, the End Reservation check box is checked and today's date is inserted. Make any required changes and click on the Save button in the lower right corner of the form.

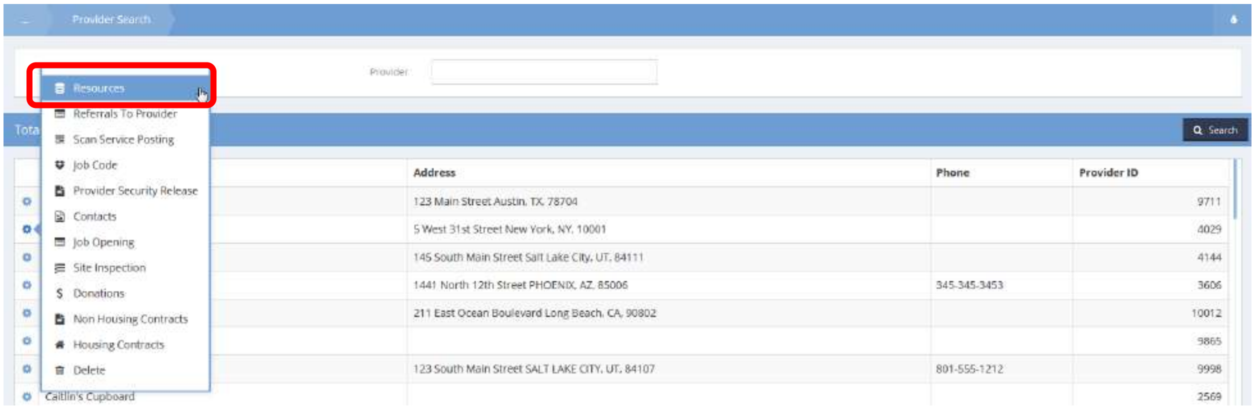
Edit Reservation w Check-In

Objective: Edit client reservations and check-in the client at the same time.

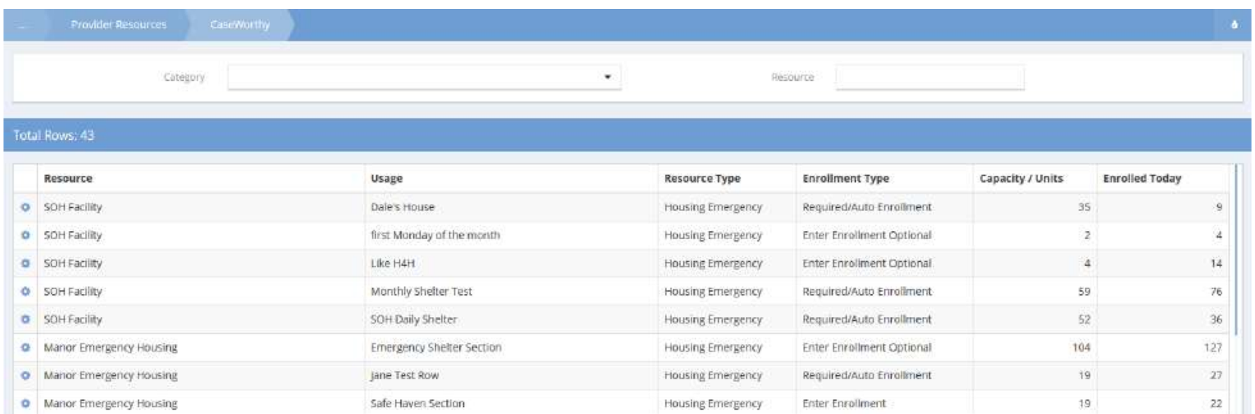
Locate the desired provider and Click on the action gear  icon to the left of the provider name.



Select Resources from the pop-up menu that appears.

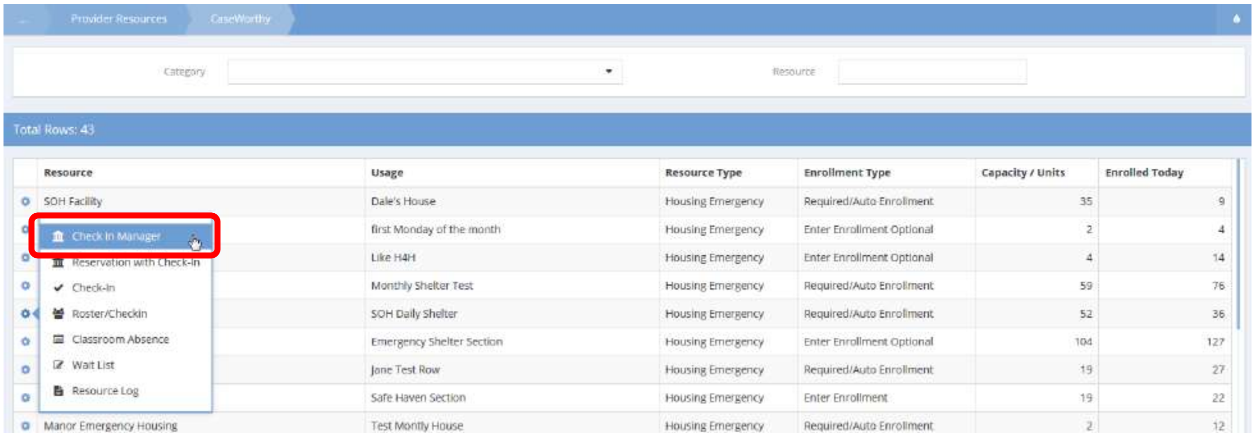


The Provider Resources form displays.



Locate the desired resource and click on the action gear associated with it.

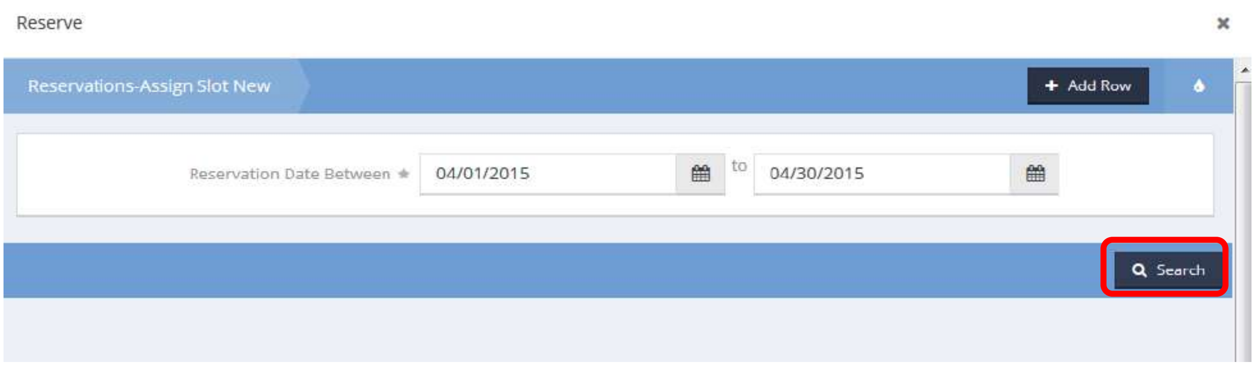
Select Check-In Manager from the pop-up menu that displays.

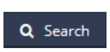


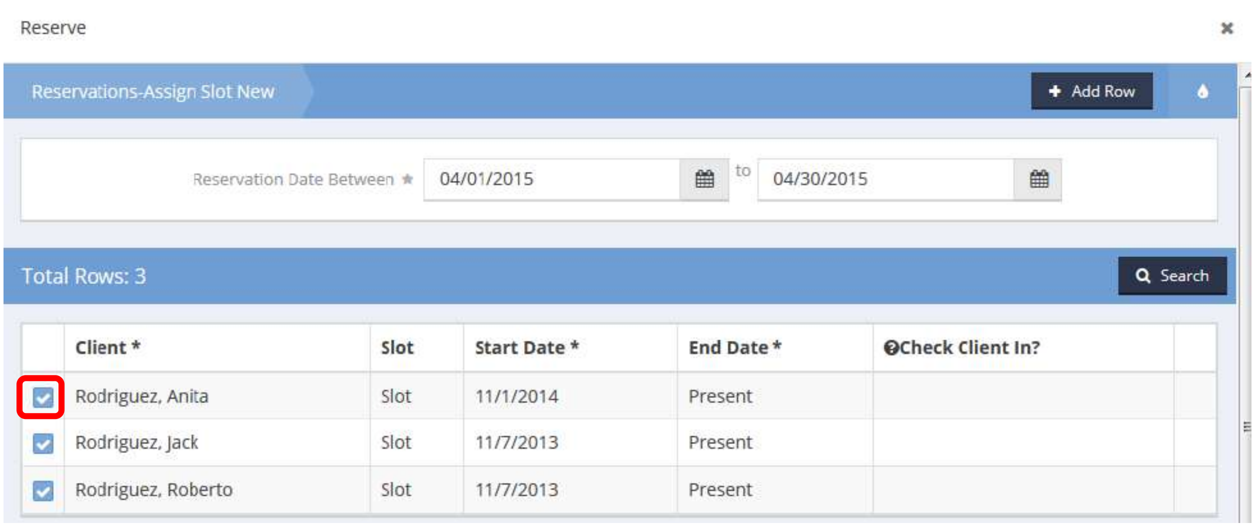
The Check-In Manager form opens in a new window. Locate the desired room and click on it.

To edit a reservation, select Reserve from the pop-up menu that displays.

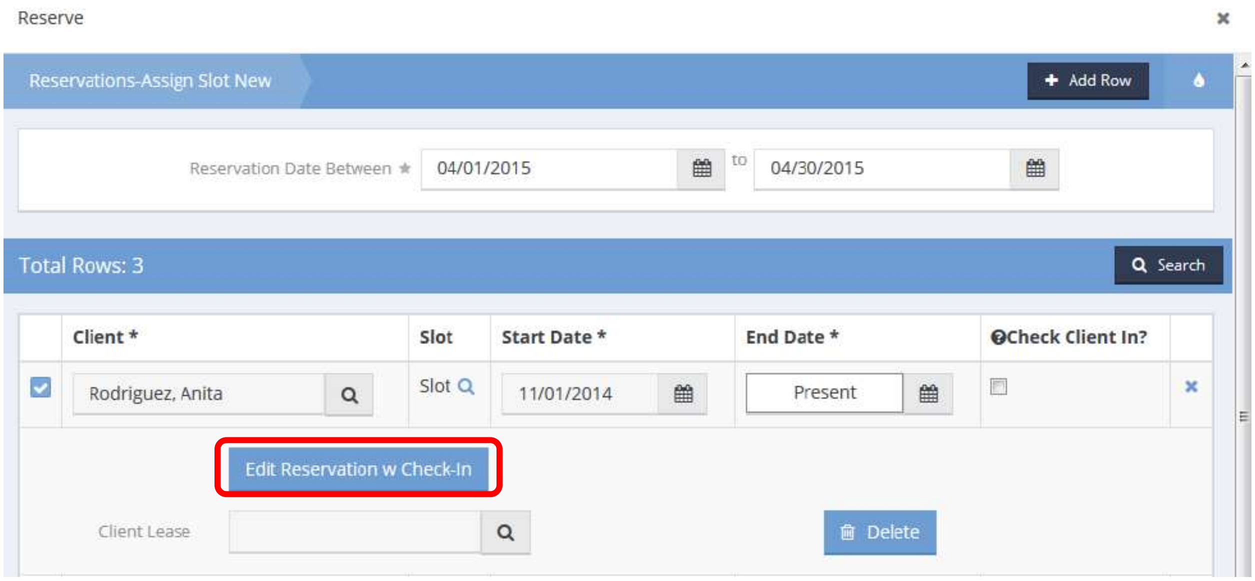
The Reserve form displays.



Click on the  button.



Select the desired row to edit and click on the blue checkbox associated with it. The row expands.

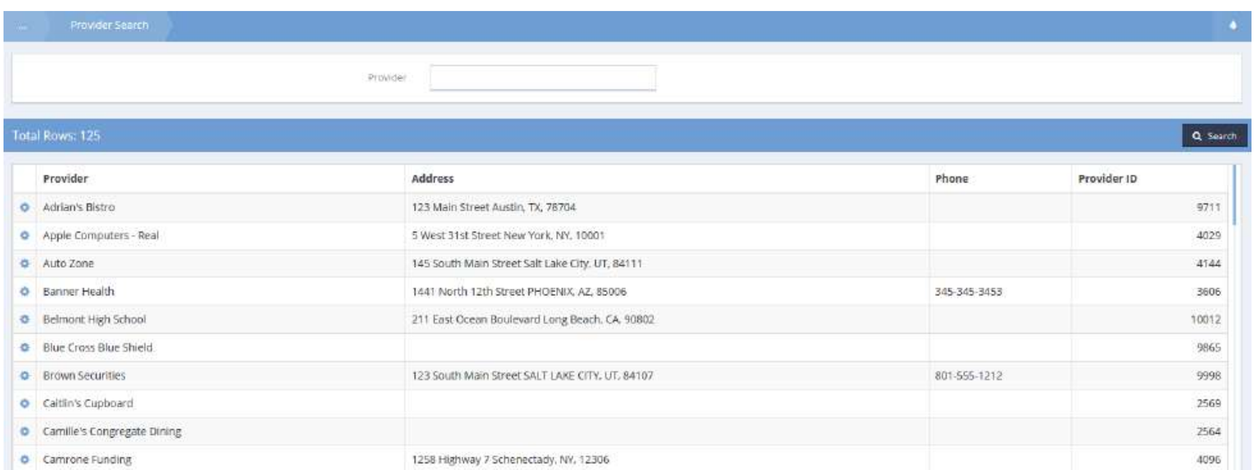


Click on the Edit Reservation w Check-In button. The Reserve form appears in edit mode. Make any desired changes and click on the Save button.

Emergency Housing Check-In

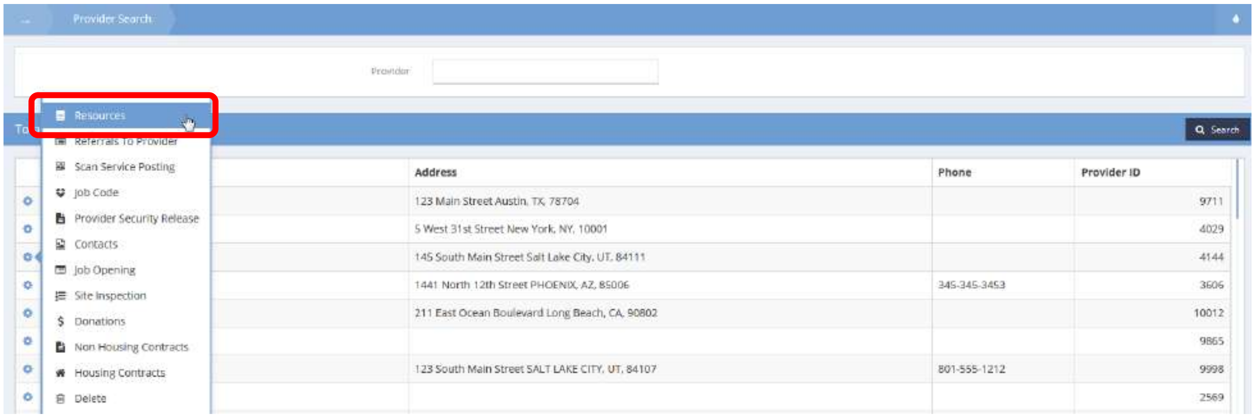
Objective: Check-in a client to an emergency housing reservation through the graphical user interface.

The Provider Search form displays. Locate the desired provider and click on the action gear icon associated with it.

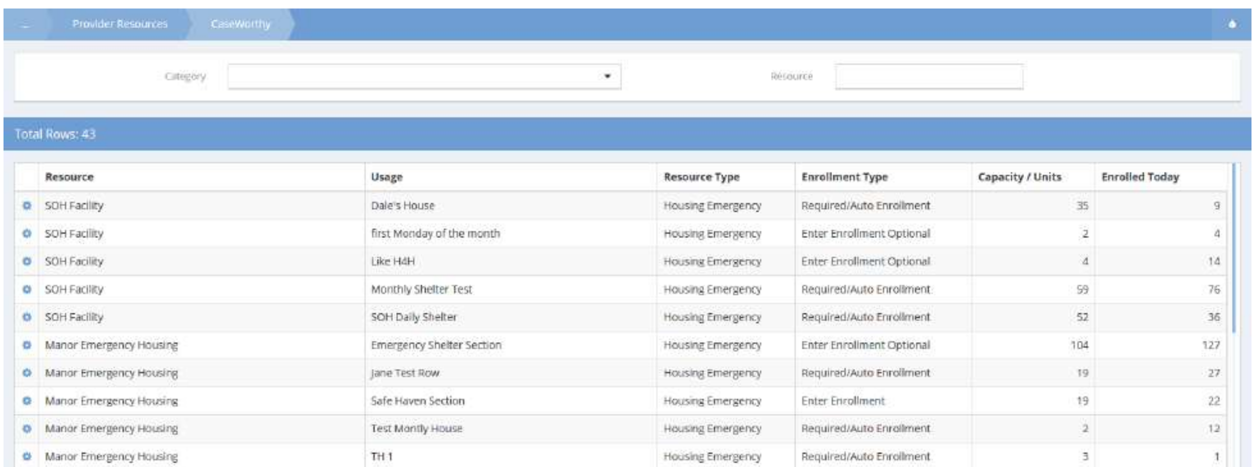


	Provider	Address	Phone	Provider ID
	Adrian's Bistro	123 Main Street Austin, TX, 78704		9711
	Apple Computers - Real	5 West 31st Street New York, NY, 10001		4029
	Auto Zone	145 South Main Street Salt Lake City, UT, 84111		4144
	Banner Health	1441 North 12th Street PHOENIX, AZ, 85006	345-345-3453	3606
	Belmont High School	211 East Ocean Boulevard Long Beach, CA, 90802		10012
	Blue Cross Blue Shield			9865
	Brown Securities	123 South Main Street SALT LAKE CITY, UT, 84107	801-555-1212	9998
	Caitlin's Cupboard			2569
	Camille's Congregate Dining			2564
	Camrone Funding	1258 Highway 7 Schenectady, NY, 12306		4096

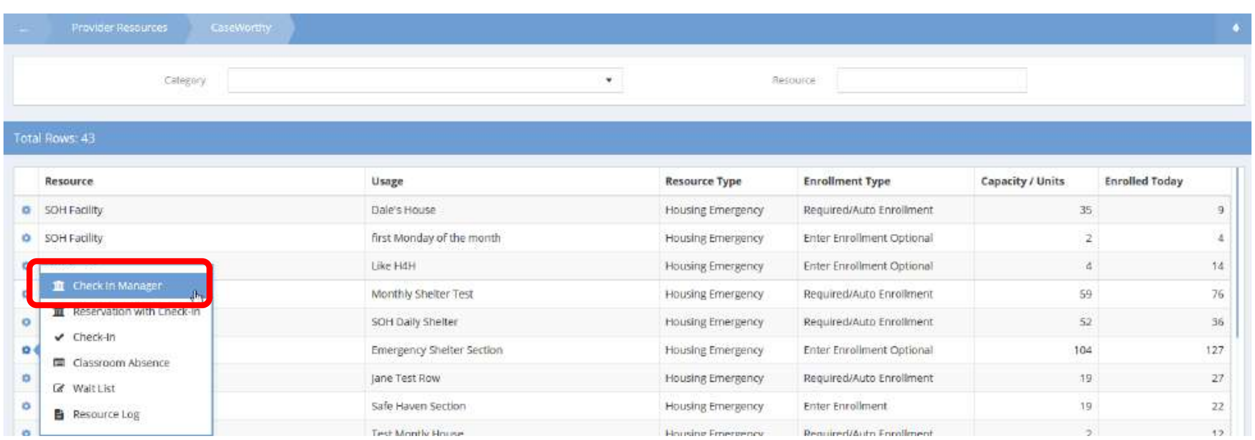
Select Resources from the pop up menu that appears.



The Provider Resources form displays. Locate the desired resource and click on the action gear icon associated with it.

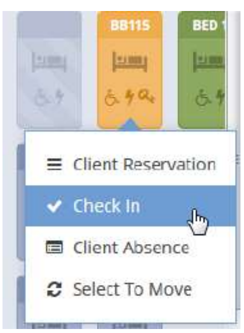


Select Check-In Manager from the pop up menu that appears.



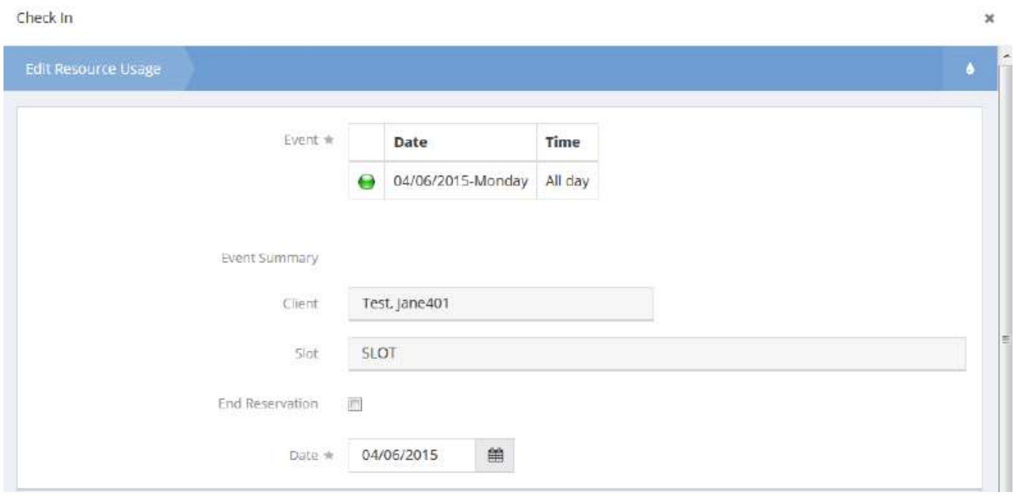
The Check-In Manager form opens in a new window.

Locate the desired bed and click on it. Select Check In from the pop up menu that appears.



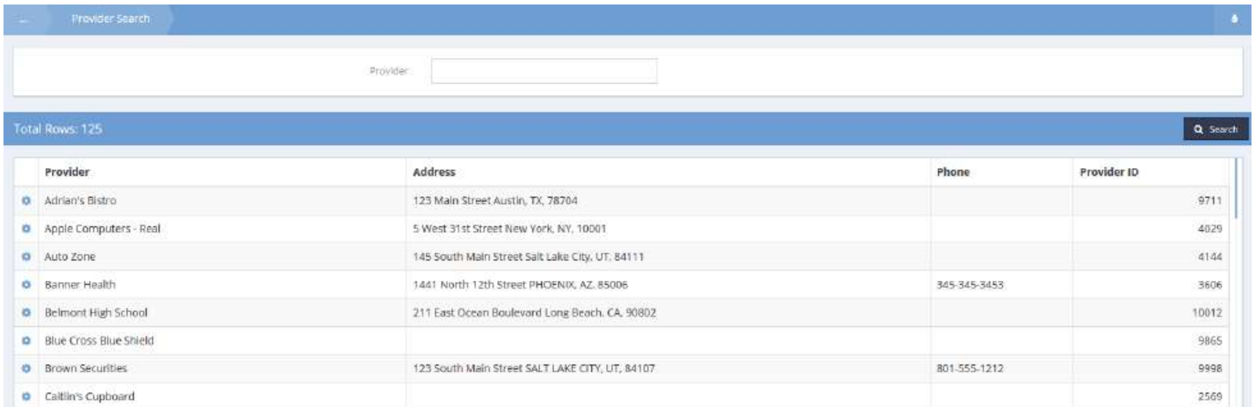
The Check-in form displays. If appropriate, check the End Reservation check box.

To complete the check-in process, click on the  button.

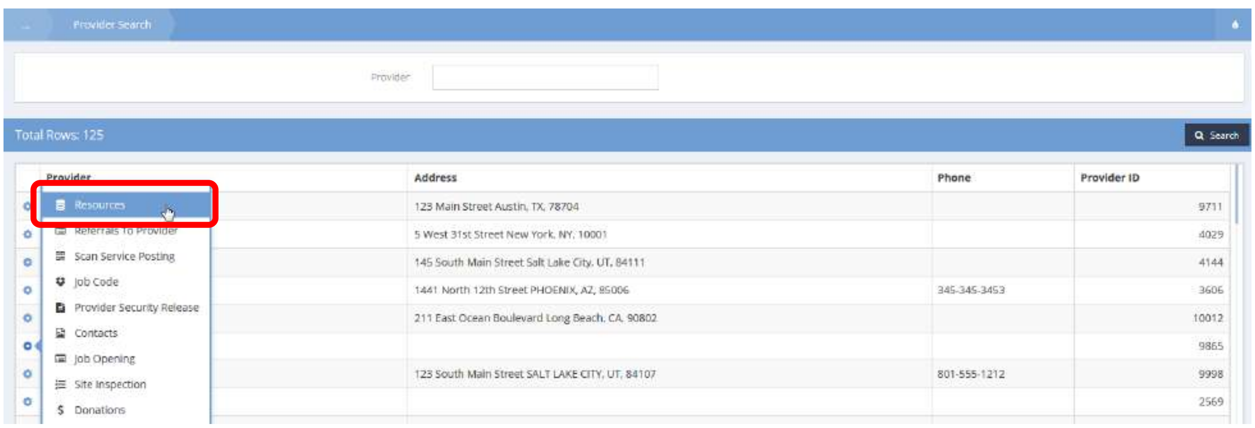


Emergency Housing Usage

Objective: Maintain, utilize and research resource usages from this list.

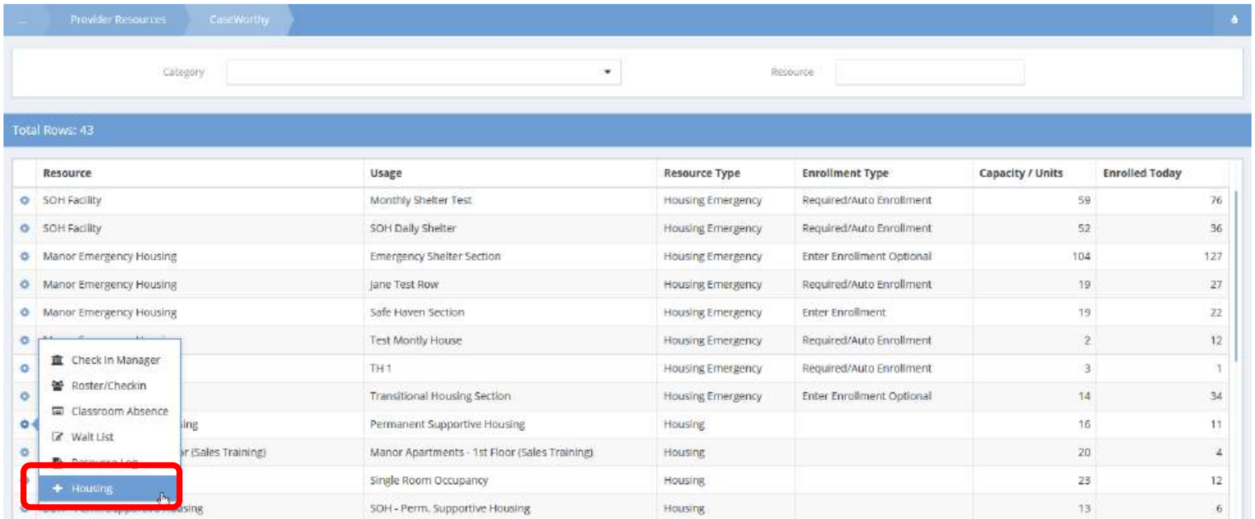


Locate the desired provider and click on the action gear associated with it. Select Resources from the pop-up menu that appears.



The Provider Resources form displays. Locate the desired resource and click on the action gear associated with it.

Select Housing from the pop-up menu that appears.



Resource	Usage	Resource Type	Enrollment Type	Capacity / Units	Enrolled Today
SOH Facility	Monthly Shelter Test	Housing Emergency	Required/Auto Enrollment	59	76
SOH Facility	SOH Daily Shelter	Housing Emergency	Required/Auto Enrollment	52	36
Manor Emergency Housing	Emergency Shelter Section	Housing Emergency	Enter Enrollment Optional	104	127
Manor Emergency Housing	Jane Test Row	Housing Emergency	Required/Auto Enrollment	19	27
Manor Emergency Housing	Safe Haven Section	Housing Emergency	Enter Enrollment	19	22
	Test Montly House	Housing Emergency	Required/Auto Enrollment	2	12
	TH 1	Housing Emergency	Required/Auto Enrollment	3	1
	Transitional Housing Section	Housing Emergency	Enter Enrollment Optional	14	34
ing	Permanent Supportive Housing	Housing		16	11
r (Sales Training)	Manor Apartments - 1st Floor (Sales Training)	Housing		20	4
	Single Room Occupancy	Housing		23	12
sing	SOH - Perm. Supportive Housing	Housing		13	6

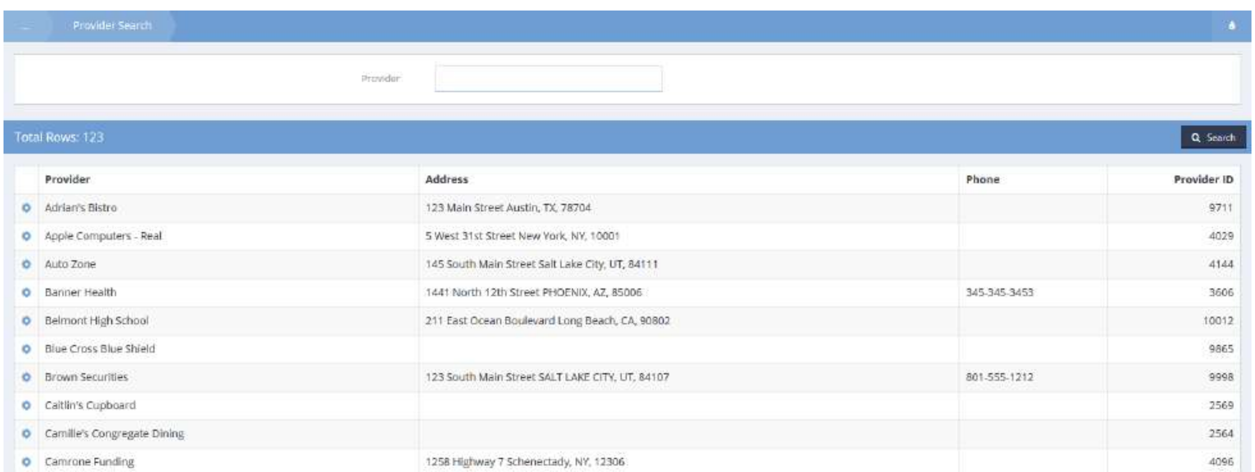
The Emergency Housing Usage form displays. Locate the desired Usage and click on the action gear associated with it.

Resource Name	Usage	Usage Label	Resource Type	Enrollment Type	Capacity / Units	Enrolled Today
Permanent Supportive Housing	Overflow (Room 210)	Rm 210	Housing	Required/Auto Enrollment	5	
Permanent Supportive Housing	Two Bedroom 1	Rm 201	Housing	Required/Auto Enrollment	5	1
Permanent Supportive Housing	Two Bedroom	Rm 203	Housing	Enter Enrollment Optional	4	
Permanent Supportive Housing	One Bedroom Rm 200	Rm 200	Housing	Required/Auto Enrollment	2	3
Permanent Supportive Housing	One Bedroom Rm 202	Rm 202	Housing	Required/Auto Enrollment	1	1
Permanent Supportive Housing	One Bedroom Rm 204	Rm 204	Housing	Required/Auto Enrollment	2	1
Permanent Supportive Housing	Three Bedroom	Rm 205	Housing	Required/Auto Enrollment	2	2
Permanent Supportive Housing	Three Bedroom	Rm 207	Housing	Enter Enrollment	2	
Permanent Supportive Housing	Four Bedroom	RM 209	Housing	Enter Enrollment Optional	1	

Many options are available from the pop-up menu that displays.

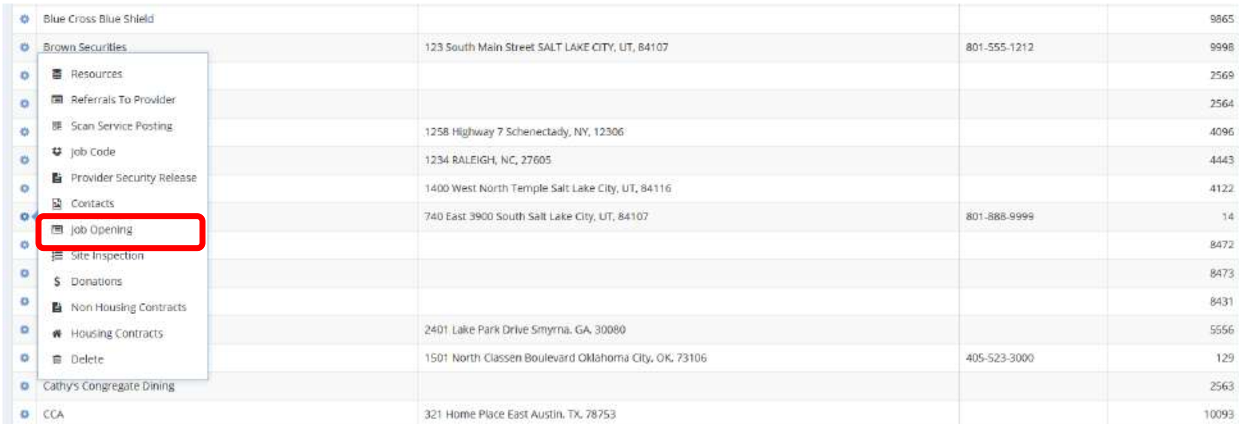
Job Opening

Job openings can be posted to the system by or for existing employers. To view job openings, first navigate to Providers>Providers.



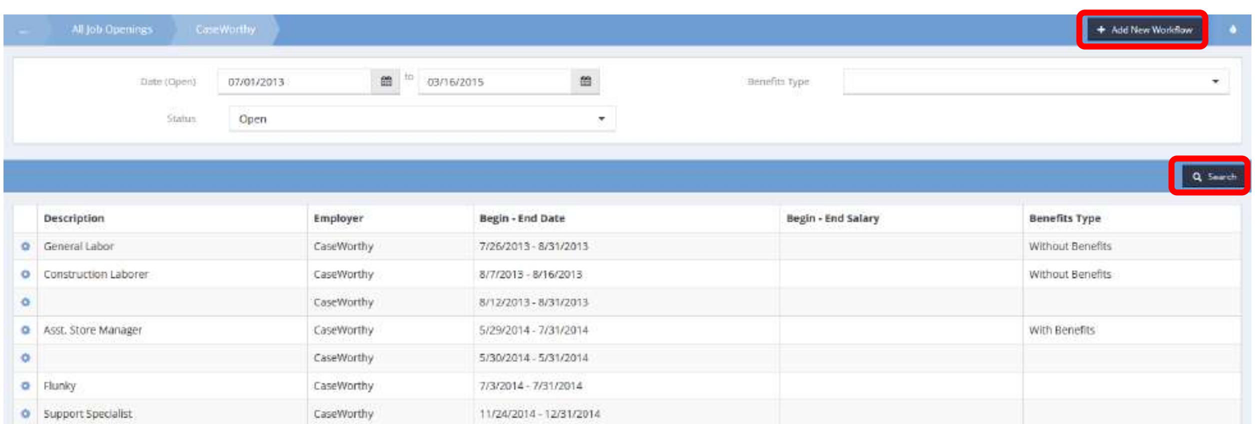
Provider	Address	Phone	Provider ID
Adrian's Bistro	123 Main Street Austin, TX, 78704		9711
Apple Computers - Real	5 West 31st Street New York, NY, 10001		4029
Auto Zone	145 South Main Street Salt Lake City, UT, 84111		4144
Banner Health	1441 North 12th Street PHOENIX, AZ, 85006	345-345-3453	3606
Belmont High School	211 East Ocean Boulevard Long Beach, CA, 90802		10012
Blue Cross Blue Shield			9865
Brown Securities	123 South Main Street SALT LAKE CITY, UT, 84107	801-555-1212	9998
Caitlin's Cupboard			2569
Camille's Congregate Dining			2564
Camrone Funding	1258 Highway 7 Schenectady, NY, 12306		4096

Select the action gear  next to a provider and click Job Opening.



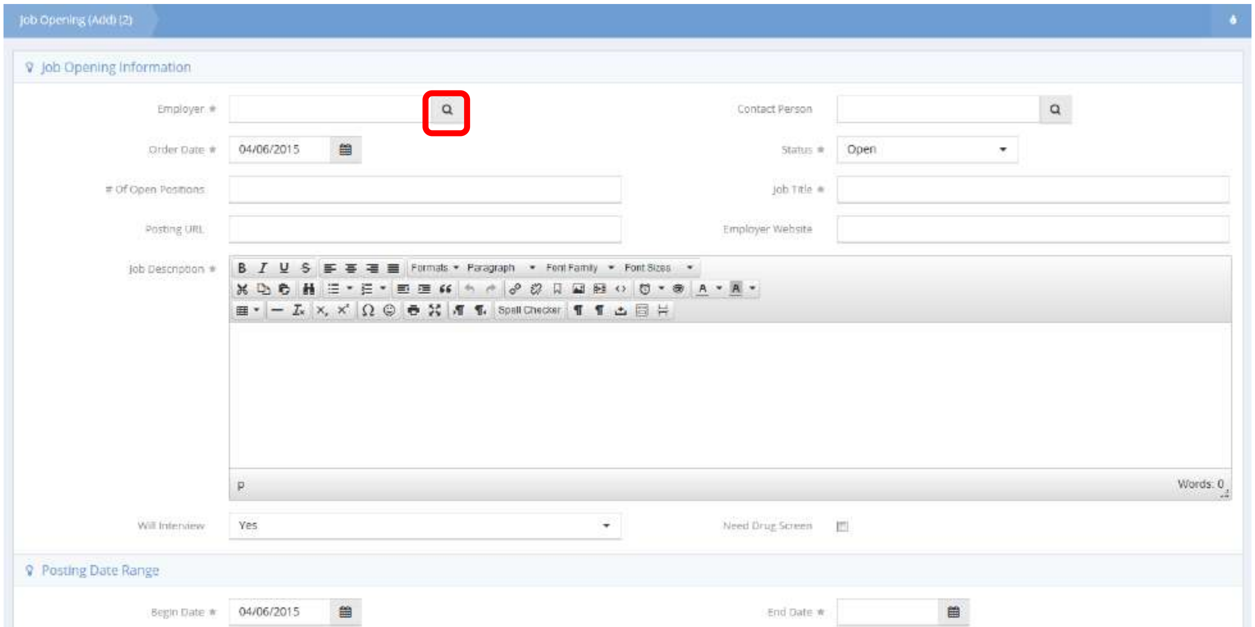
Select a date range and click on the Search button. To add a new job, click on the + Add New Workflow button.

The Create Job Order Workflow displays

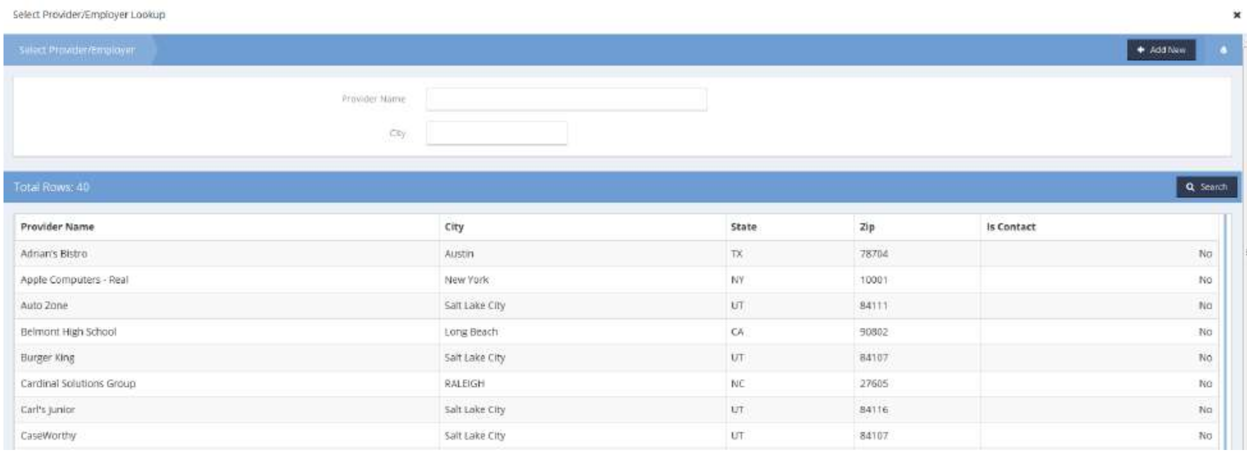


Employer Lookup

Select an employer with the magnifying glass  icon.

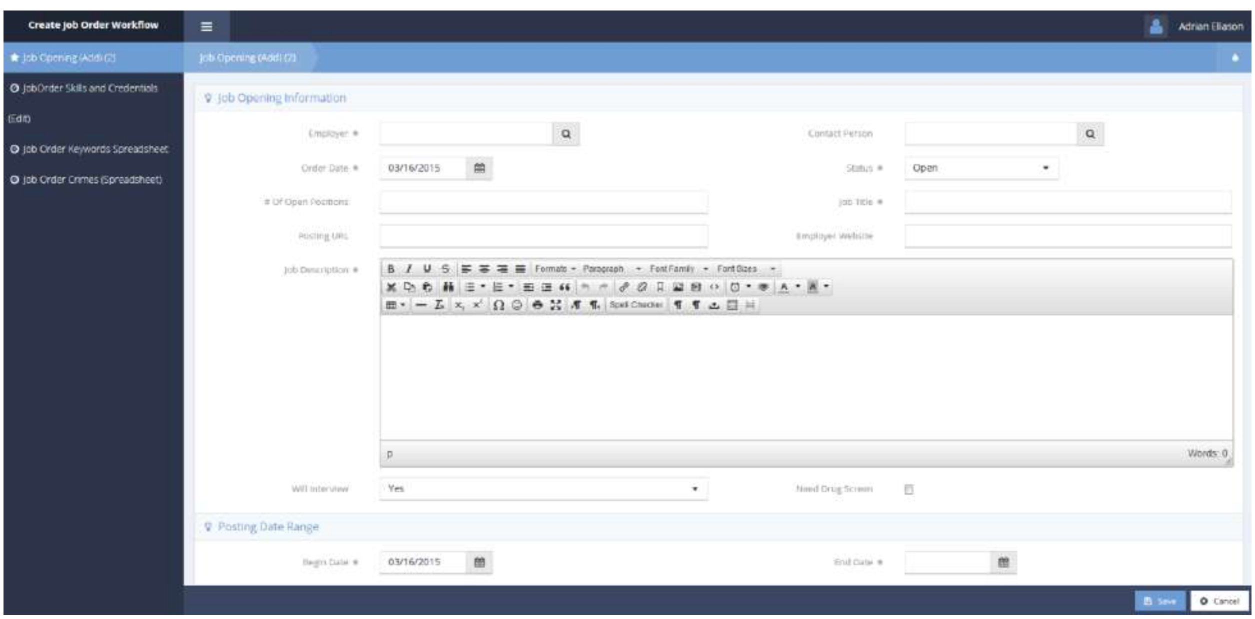


The Employer Lookup form displays.



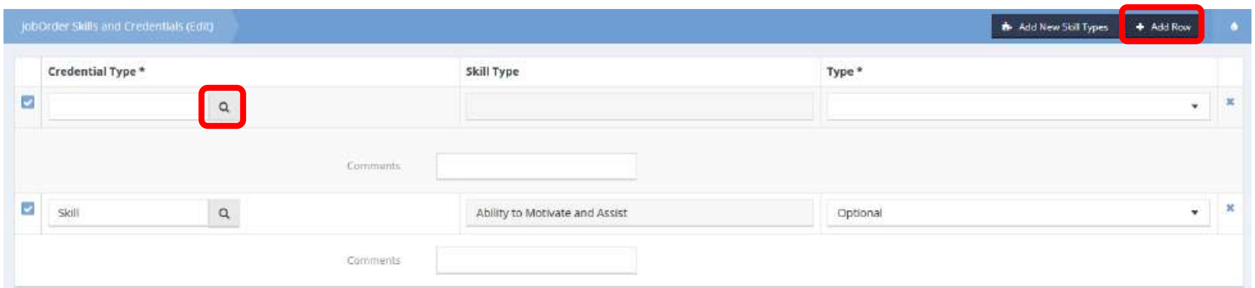
If desired, filter the results by entering any or all of the desired employer in the Provider field and the desired city. If not, merely select the desired employer from the list presented.

Enter an order date, select a status, enter a job title, and enter a job description. Enter begin and end dates and finally select a position type and pay type. Enter any additional info and click Save to proceed to the next step.

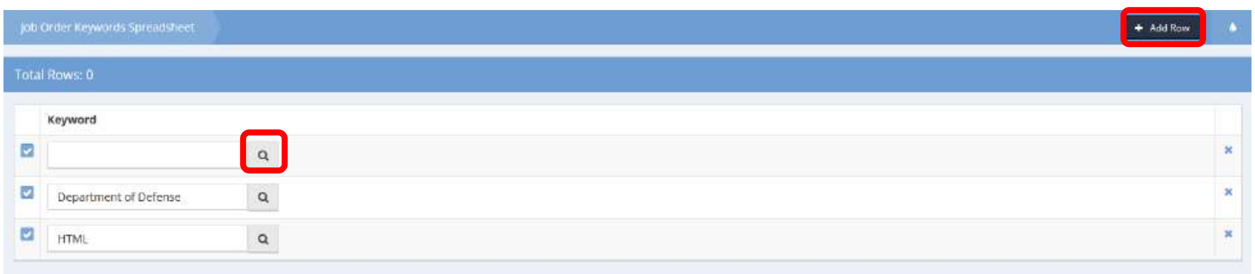


Enter any skill and credential types using the magnifying glass icon. Click Add Row to add additional slots for credentials.

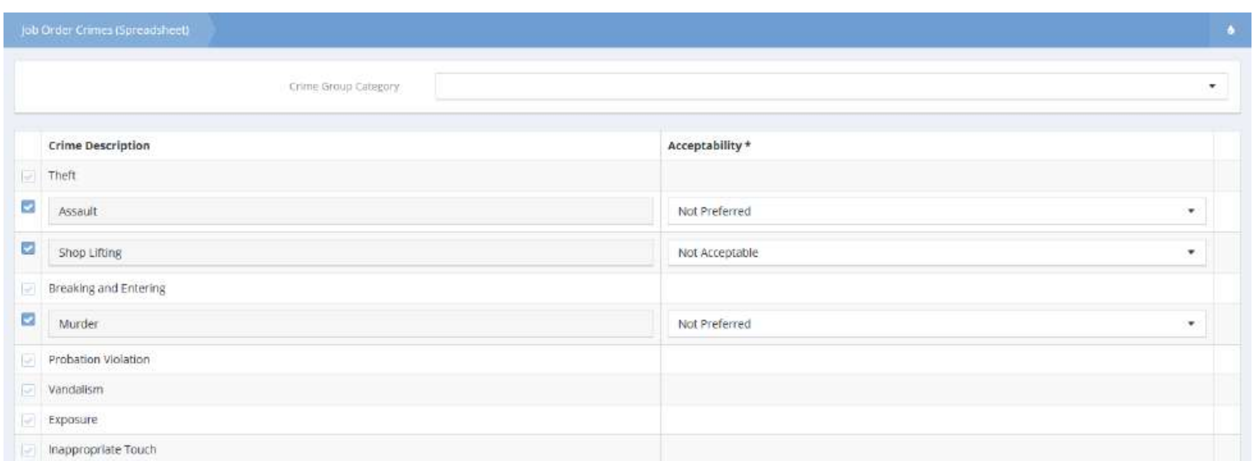
Click Save to proceed to the next step.



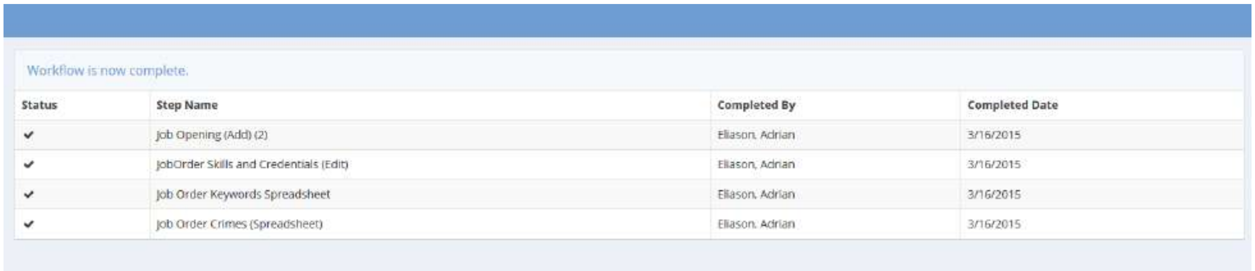
Click Add Row to add a keyword and use the magnifying glass lookup to lookup any keywords desired to be associated with the job. Click Save to proceed to the next step.



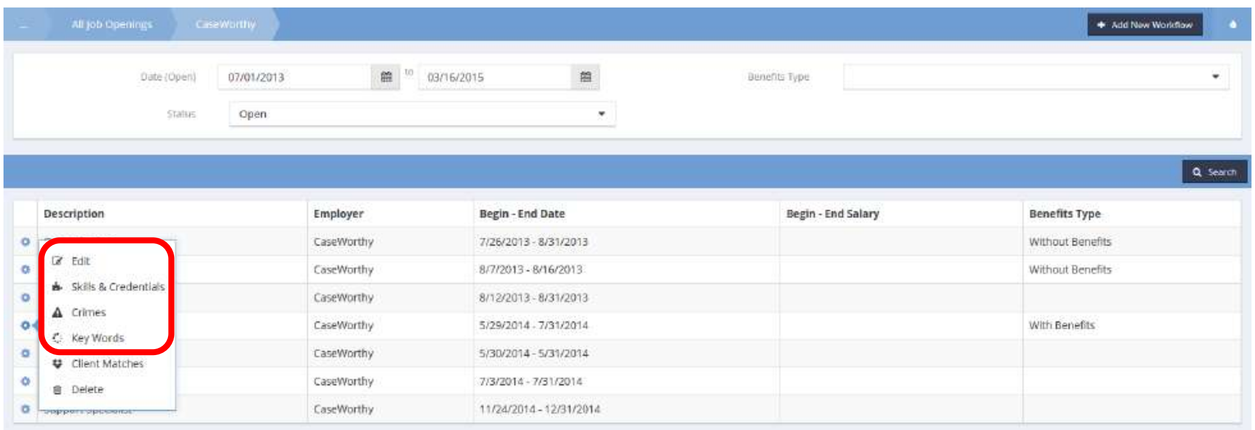
Add a crime by clicking the clear checkbox and select either Not Preferred or Not Acceptable. Click Save when finished.



The job is now created. Click ✔ Done to return to the Job Openings form.



To edit an existing job, click the action gear and click the desired item to edit for the job. The same forms seen in the Create Job Order Workflow display.



Landlords

The Landlord Search form displays a list of providers with properties. The search bar can be used to filter the list of providers. To view properties, click the View Properties button. The Landlord Summary form displays.

To view ratings on a property, click the Question Rating button for ratings based on questions and click Client Ratings for overall ratings.

Each rating summary can be filtered by selecting a follow up type from the drop-down list and clicking the Search button.

Employers

Entity Demographics

Objective: View and edit hiree demographic information for employers.

Employer	Address	No. of Contacts	Provider ID
Adrian's Bistro		0	9711
Adrian's Bistro		1	9712
Auto Zone		12	4144
Burger King	785, Salt Lake City, UT 84107	4	4108
Cardinal Solutions Group	1234, RALEIGH, NC 27605	1	4443
Carl's Junior	1400 West North Temple, Salt Lake City, UT 84116	4	4122
CaseWorthy	740 East 3900 South, Salt Lake City, UT 84107	197	14
Chick-fil-A	700 East 3900 South, Salt Lake City, UT 84107	1	9705
Disney World	#1 Magic Kingdom Lane, ORLANDO, FL 32804	3	8171
Empowered Electric	, San Antonio, TX 78253	3	2484
Goodwill Northern Illinois		2	6860

On the Employer summary form, click the action gear associated with the desired employer and select Contacts from the pop up menu that appears.

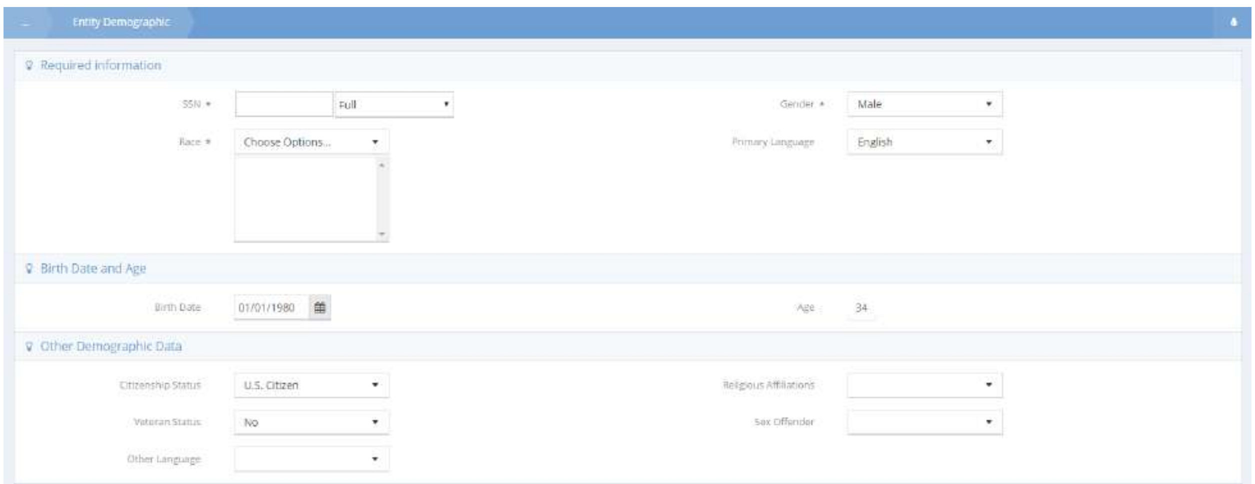
Employer	Address	No. of Contacts	Provider ID
Adrian's Bistro		0	9711
Adrian's Bistro		1	9712
Auto Zone		12	4144
Burger King	785, Salt Lake City, UT 84107	4	4108
Cardinal Solutions Group	1234, RALEIGH, NC 27605	1	4443
	1400 West North Temple, Salt Lake City, UT 84116	4	4122
	740 East 3900 South, Salt Lake City, UT 84107	185	14
	700 East 3900 South, Salt Lake City, UT 84107	1	9705
Disney World	#1 Magic Kingdom Lane, ORLANDO, FL 32804	3	8171
Empowered Electric	, San Antonio, TX 78253	3	2484
Goodwill Northern Illinois		2	6860

The Contact Summary form displays.

Name	Description	Cell Phone	Email
Austin, Steve	Volunteer		
Austin, Steve	Volunteer		
Austin, Steve	Volunteer		
Austin, Steve	Volunteer		
Barry, Davis	Volunteer		bbingel@CaseWorthy.com
Barry, Davis	Coordinated Assessment Contact		bbingel@CaseWorthy.com
Bingel - Vol 924, Brian	Volunteer		bbingel@caseworthy.com
Bingel (Volunteer), Brian	Volunteer	801-555-1212	bbingel@myecm.net

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

The Entity Demographic form displays.



Enter all required info and click on the  button.

Contact Summary

Objective: View contact info for a hiree.

Employer

Employer	Address	No. of Contacts	Provider ID
Adrian's Bistro		0	9711
Adrian's Bistro		1	9712
Auto Zone		12	4144
Burger King	785, Salt Lake City, UT 84107	4	4108
Cardinal Solutions Group	1234, RALEIGH, NC 27605	1	4443
Carl's Junior	1400 West North Temple, Salt Lake City, UT 84116	4	4122
CaseWorthy	740 East 3900 South, Salt Lake City, UT 84107	197	14
Chick-fil-A	700 East 3900 South, Salt Lake City, UT 84107	1	9705
Disney World	#1 Magic Kingdom Lane, ORLANDO, FL 32804	3	8171
Empowered Electric	, San Antonio, TX 78253	3	2484
Goodwill Northern Illinois		2	6860

Click the action gear icon for the desired employer and select Hirees from the pop up menu that appears.

Employer

Employer	Address	No. of Contacts	Provider ID
Adrian's Bistro		0	9711
Adrian's Bistro		1	9712
Auto Zone		12	4144
Burger King	785, Salt Lake City, UT 84107	4	4108
Cardinal Solutions Group	1234, RALEIGH, NC 27605	1	4443
	1400 West North Temple, Salt Lake City, UT 84116	4	4122
	740 East 3900 South, Salt Lake City, UT 84107	185	14
	700 East 3900 South, Salt Lake City, UT 84107	1	9705
Disney World	#1 Magic Kingdom Lane, ORLANDO, FL 32804	3	8171
Empowered Electric	, San Antonio, TX 78253	3	2484
Goodwill Northern Illinois		2	6860

The Contact Summary form displays.

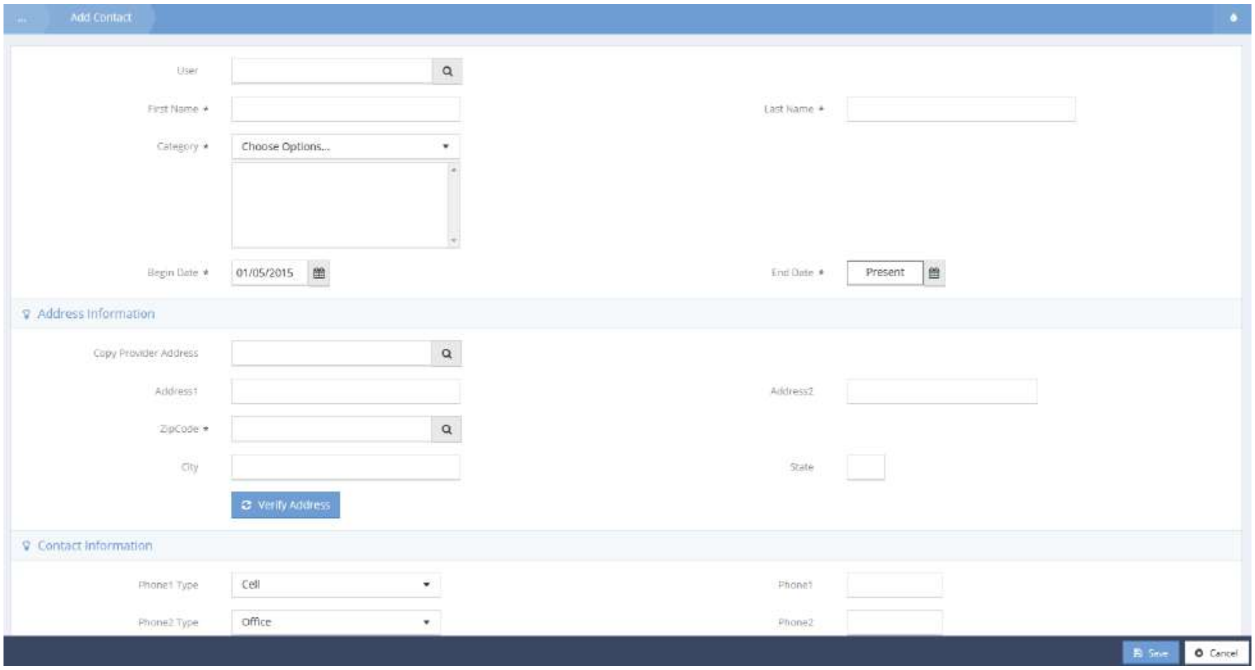
Contact Summary Manage Categories Add New

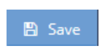
Total Rows: 2

Name	Description	Cell Phone	Email
Bingel, Brian	Hiree	801-898-1214	bbingel@CaseWorthy.com
Jane, JaneH	Hiree		jtjoe@CaseWorthy.com

To add a contact, click the Add New button.

The Add Contact form displays.



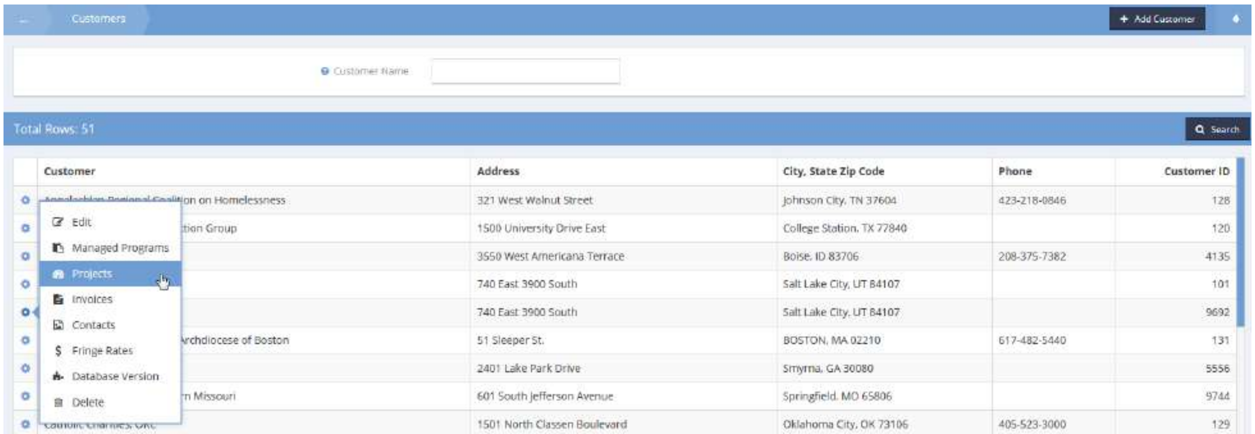
Enter all required fields and click on the  button.

Customers

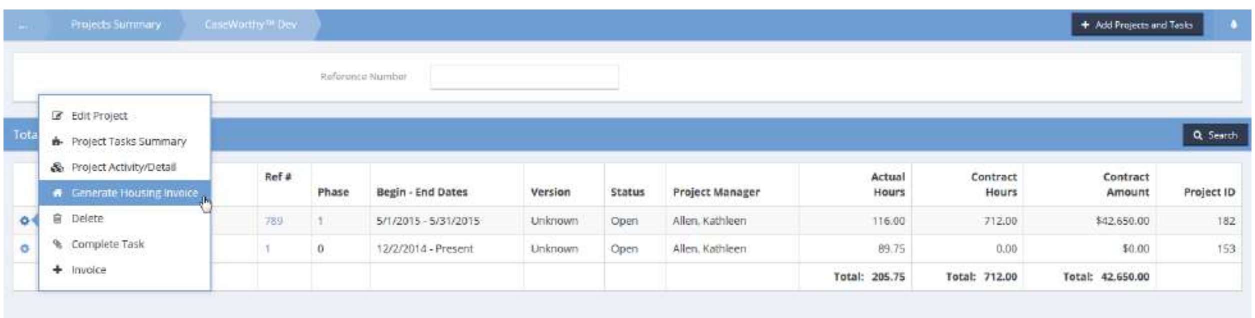
Generate Housing Invoice

Objective: Generate a provider housing invoice.

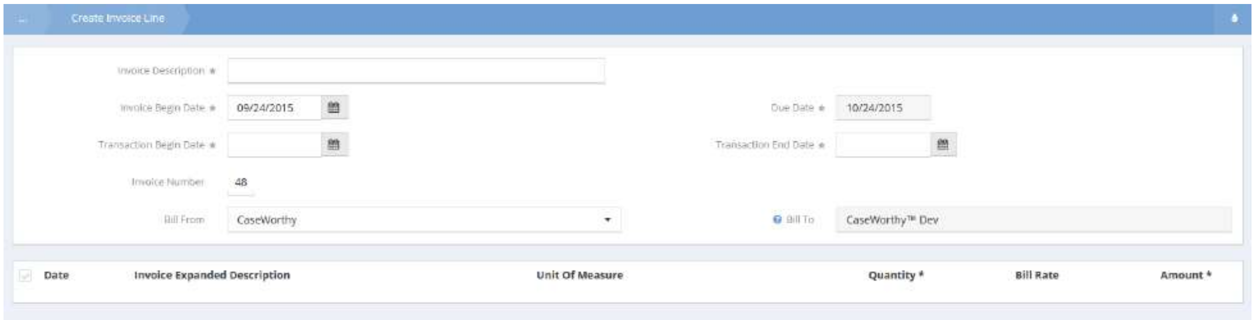
Navigation: Organization>Providers>Customers



Click the action gear associated with the desired customer and select Projects from the pop up menu that appears. The Projects Summary form displays.



Click the action gear associated with the desired project and click Generate Housing Invoice from the pop up menu that appears. The Create Invoice Line form displays.

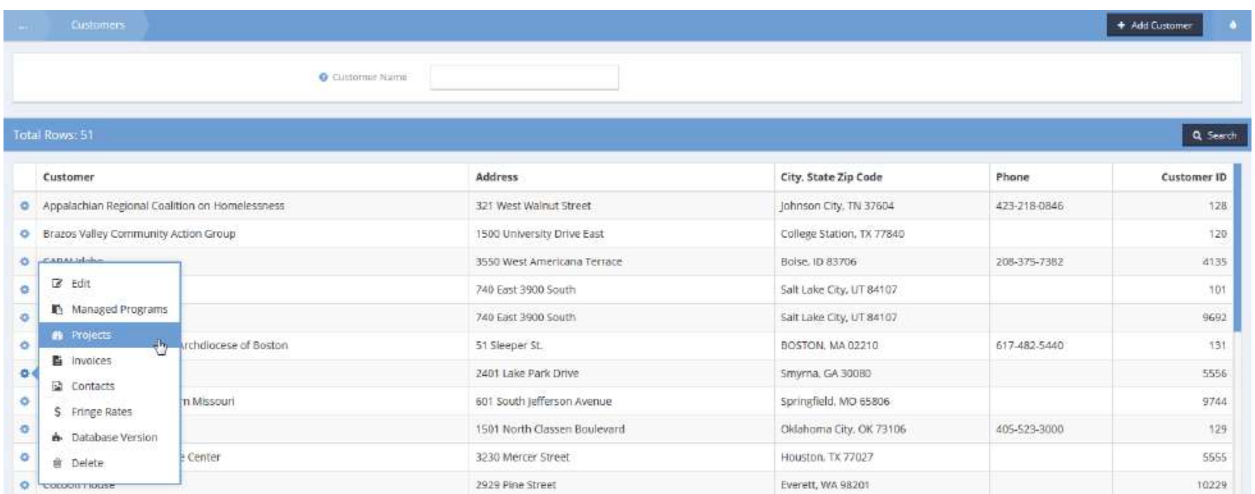


Enter a description and date range. Click the clear checkbox icon for an item, enter a quantity and amount. Click Save when finished.

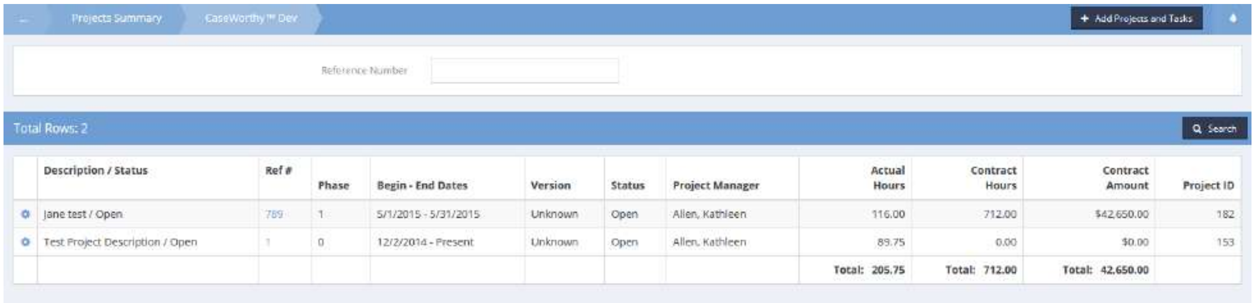
Assign Project Tasks

Objective: Create and assign task assignments for a customer project.

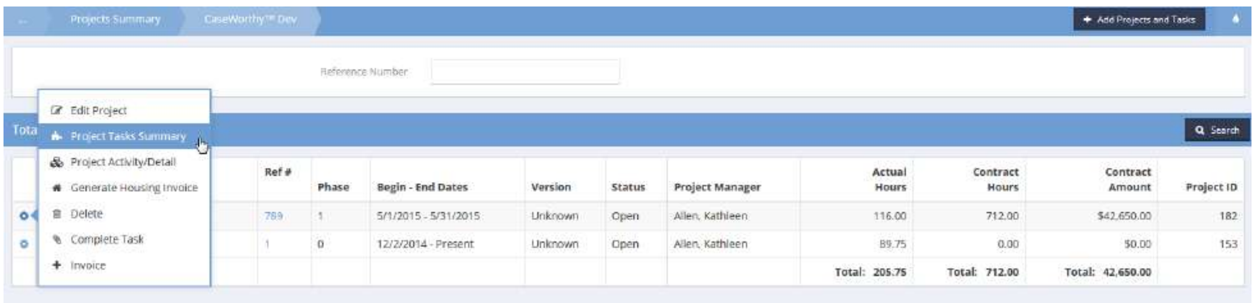
Navigation: Organization>Providers>Customers



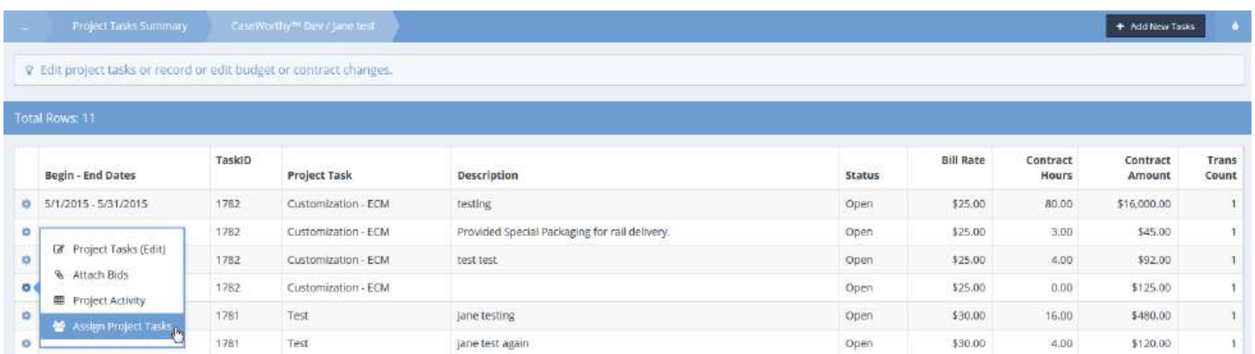
Click the action gear on the desired customer and click Projects.



The Projects Summary form displays.

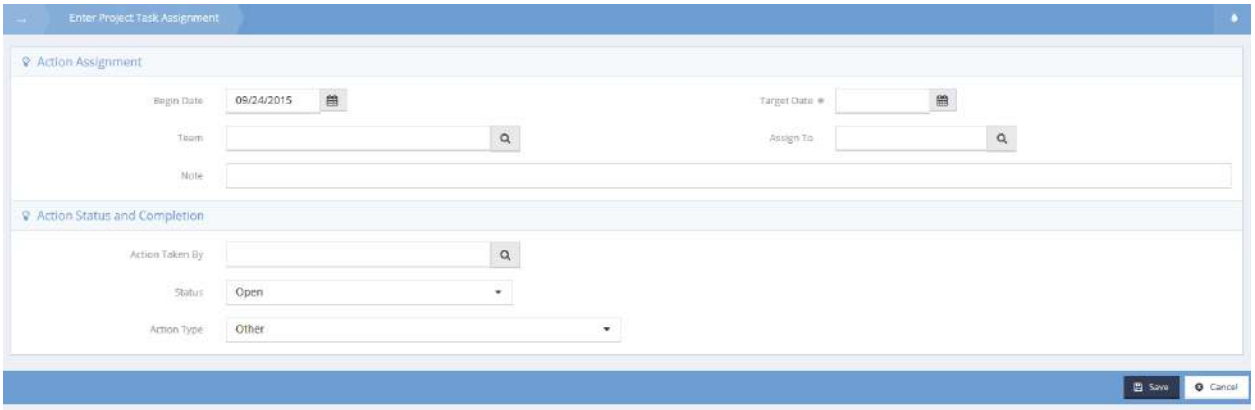


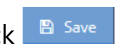
Click the action gear and click Project Tasks Summary. The Project Tasks Summary form displays.



Click the action gear and click Assign Project Tasks. The Assign Project Tasks form displays.

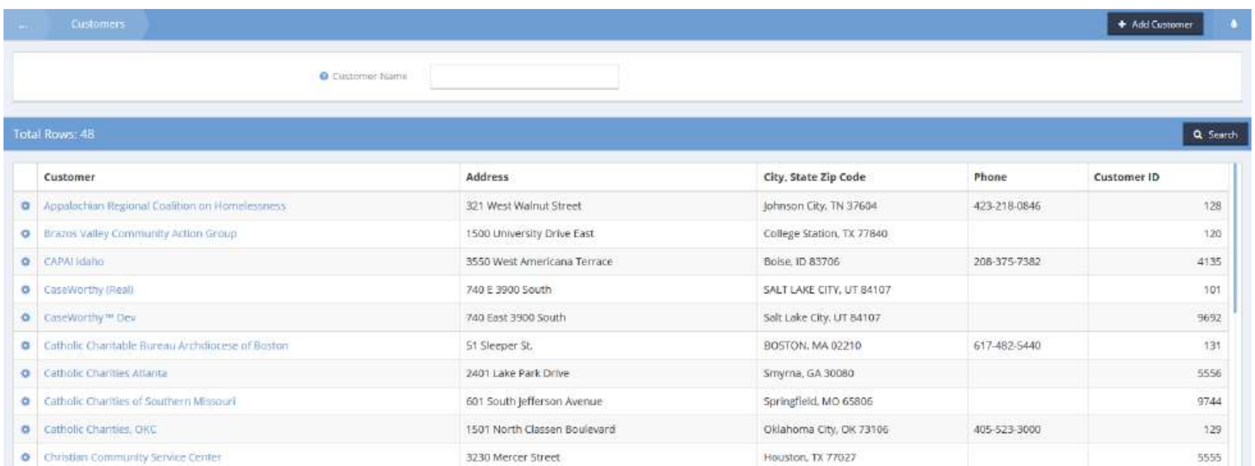
Click the Add New button. The Enter Project Task Assignment form displays.



Enter a target date, note, and assign to a team and member if desired. Click  when finished.

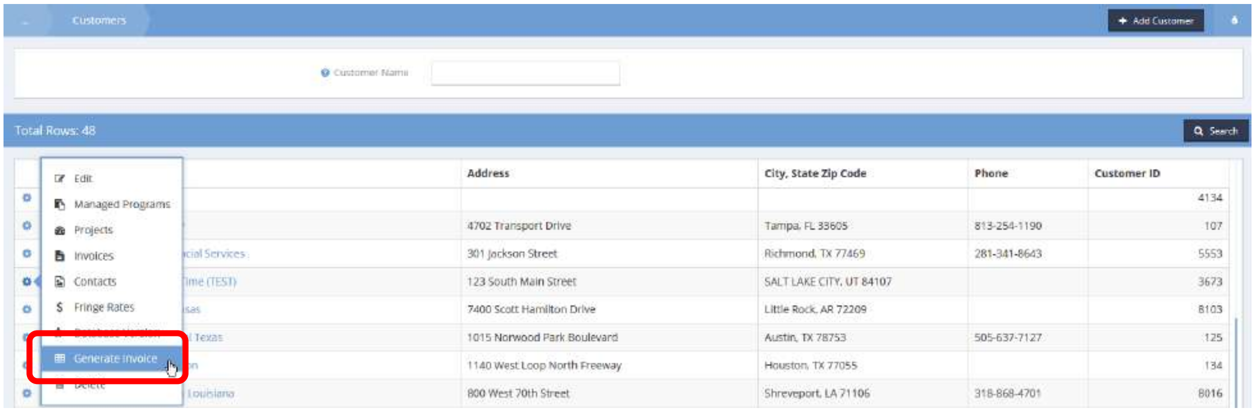
Generate Invoice From Customer New

Objective: Select an invoice to be generated from a list based upon the customer.

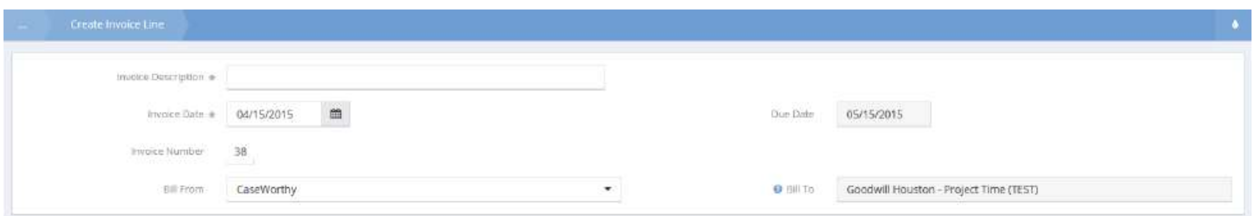


Locate the desired customer and click on the action gear associated with it.

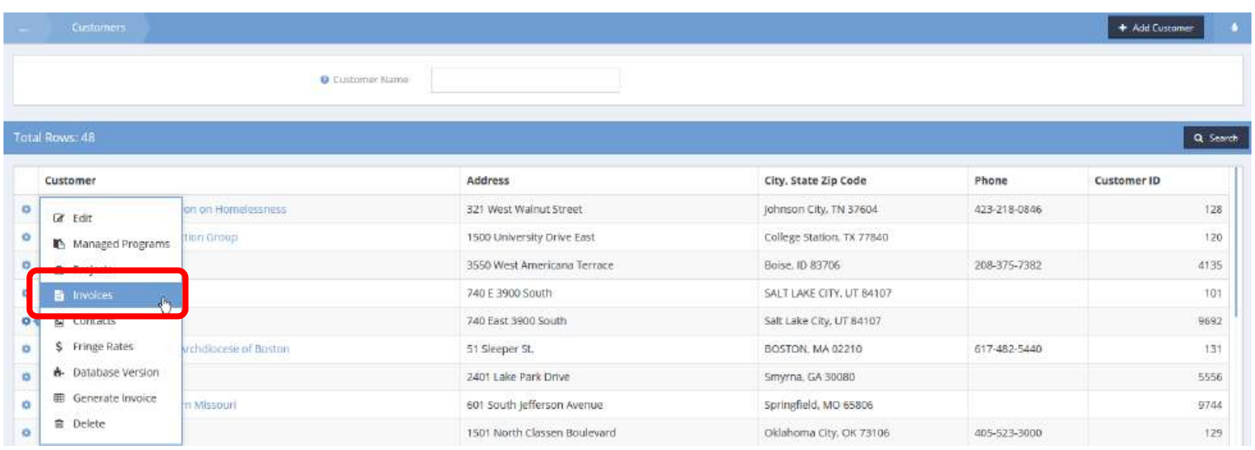
Select Generate Invoice from the pop-up menu that appears.



The Create Invoice Line form displays. Enter a description, make any other changes and click Save when finished.



To view invoices, click the action gear and click Invoices.



The Summary of Invoices by Customer form displays.

Summary of Invoices by Customer | Goodwill Houston - Project Time (TEST)

Total Rows: 29

Invoice Date	Due Date	Printed Date	Invoice Number	Project	Amount
6/4/2014	7/4/2014		37	Employment Contract Services	$286.50
3/3/2014	4/2/2014		36	Employment Contract Services	$10.00
3/3/2014	4/2/2014		35	Employment Contract Services	$20.00
1/2/2014	2/1/2014		30	Employment Contract Services	$0.00
9/5/2013	10/5/2013		29	Employment Contract Services	$153.00
8/27/2013	9/26/2013		28	Employment Contract Services	$37.00
8/13/2013	9/12/2013		27	Employment Contract Services	$80.00
8/13/2013	9/12/2013		26	Employment Contract Services	$180.00
8/12/2013	9/11/2013		25	Employment Contract Services	$264.00
8/11/2013	9/10/2013		24	Employment Contract Services	$344.00

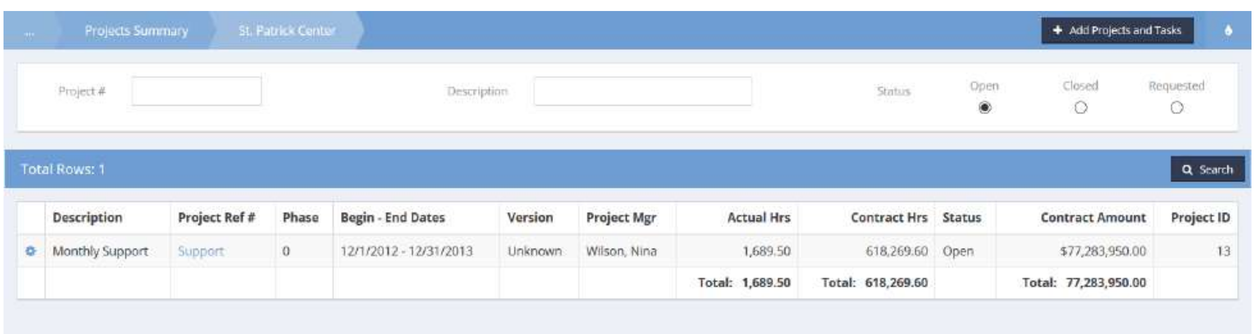
Customer Project

Objective: View Files for a customer project.

Navigation: Organization>Providers>Customers

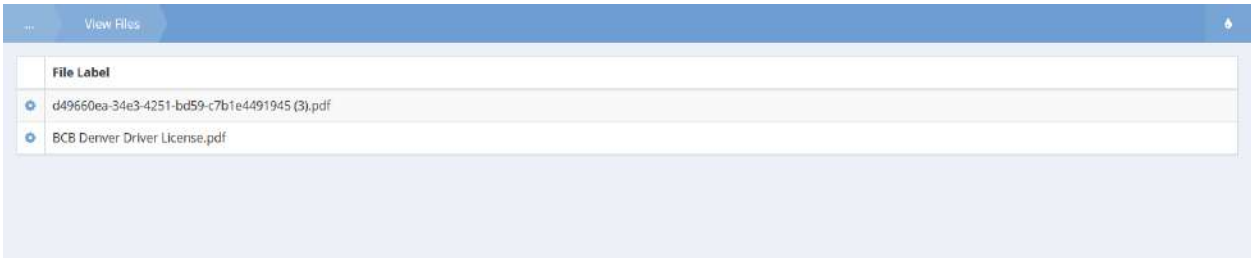
The Customers form displays.

Click the action gear icon associated with the desired customer and select Projects from the menu items. The Projects Summary form displays.



Click the action gear icon associated with the desired project and select View Files from the menu options.

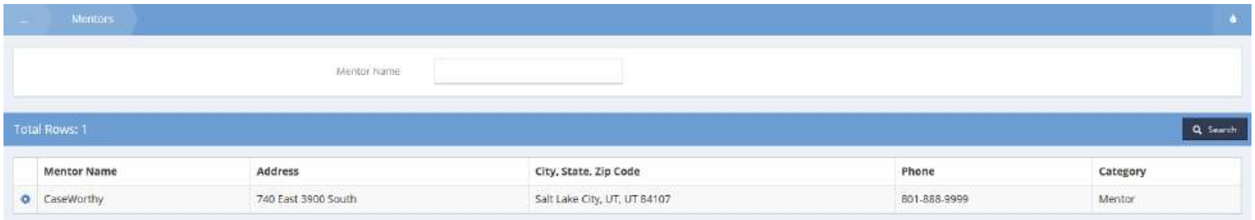
The View Files form displays.



Any files that have been uploaded for that project display here. Use the action gear icon to view the attached file. Click the Done button when finished.

Mentors

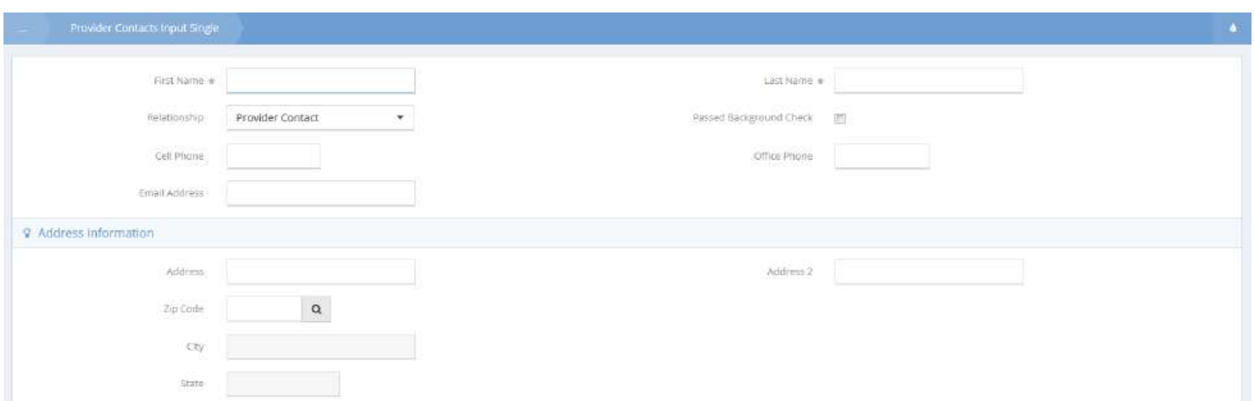
Mentors may be filtered by entering a name and clicking the Search button.



To view or edit contacts, click the action gear and click Contacts. The Provider Contacts Summary form displays.

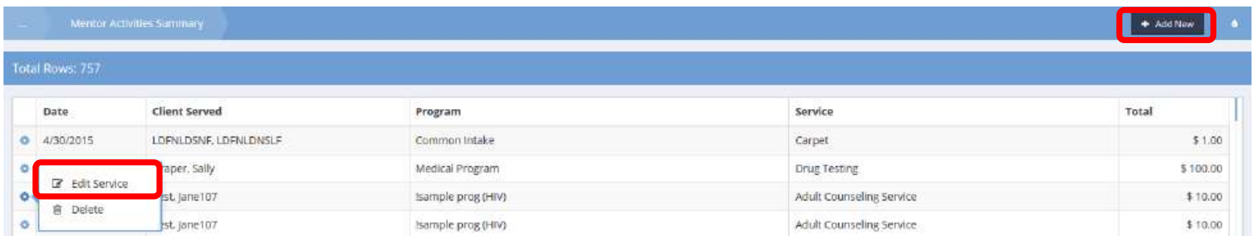
To add a new contact, click the Add New button. To edit a contact, click the action gear and click Edit.

Enter a first and last name and any other desired info. Click Save when finished.



To view or edit service activities, click the action gear and click Service Activities.

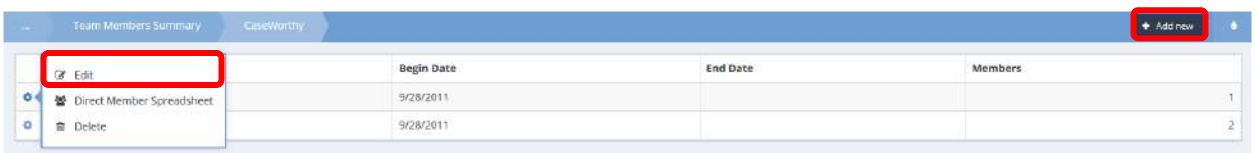
To add a new service, click the Add New button. To edit a contact, click the action gear and click Edit Service.



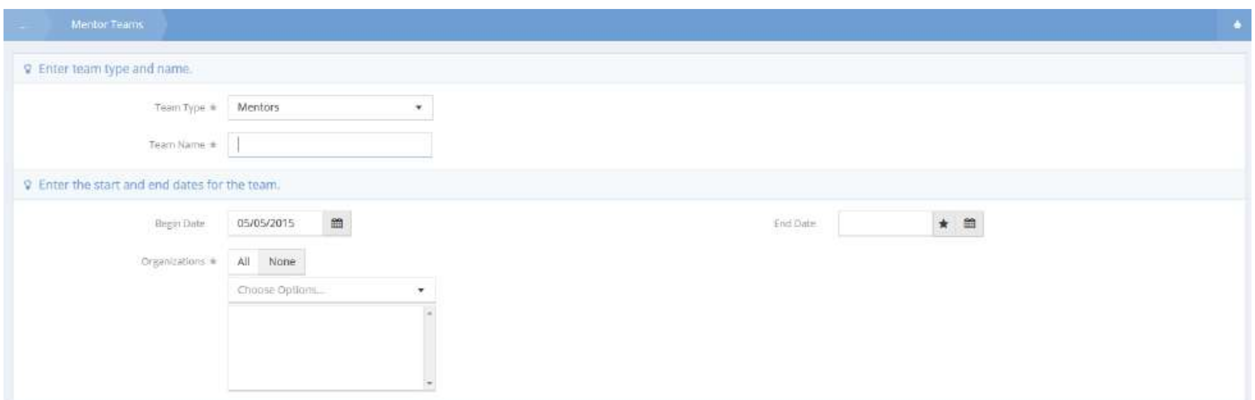
Click the magnifying glass icon for Client Name and select a client using the Find Client Lookup. Enter all other required information. Click Save when finished.

To view or edit teams, click the action gear and click Teams.

Click the Add New button to create a new team or click the action gear and click Edit to edit an existing team.



Enter a team name and select the organizations to associate it with. Click the Save button when finished.



To view or edit Assigned Clients, click the action gear and click Assigned Clients.

Click the + Add New button to create a new assignment or click the action gear and click Edit to edit an existing assignment.

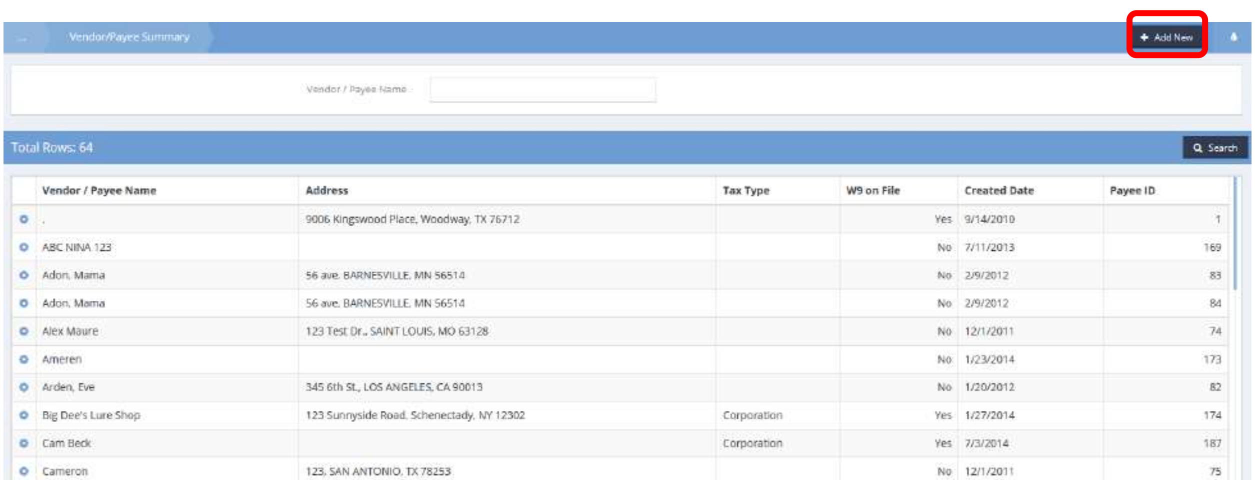
Fill out all info and click Save when finished.

Vendors and Payees

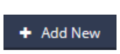
Vendor / Payee Summary

Objective: Add edit or review vendors and payees.

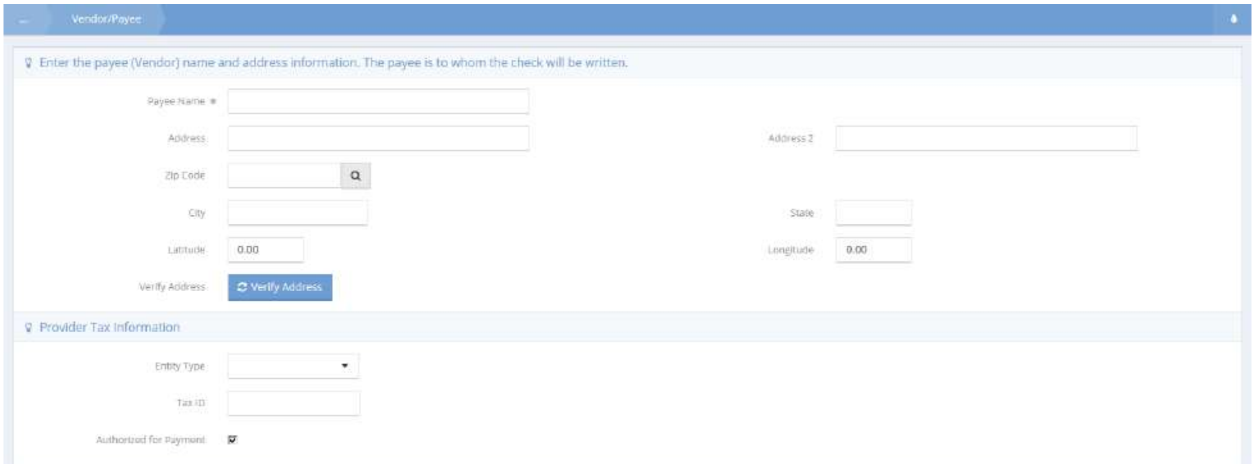
The Vendor/Payee Summary form displays.



Vendor / Payee Name	Address	Tax Type	W9 on File	Created Date	Payee ID
.	9006 Kingswood Place, Woodway, TX 76712		Yes	9/14/2010	1
ABC NINA 123			No	7/11/2013	169
Adon, Mama	56 ave. BARNESVILLE, MN 56514		No	2/9/2012	83
Adon, Mama	56 ave. BARNESVILLE, MN 56514		No	2/9/2012	84
Alex Maure	123 Test Dr., SAINT LOUIS, MO 63128		No	12/1/2011	74
Ameren			No	1/23/2014	173
Arden, Eve	345 6th St., LOS ANGELES, CA 90013		No	1/20/2012	82
Big Dee's Lure Shop	123 Sunnyside Road, Schenectady, NY 12302	Corporation	Yes	1/27/2014	174
Cam Beck		Corporation	Yes	7/3/2014	187
Cameron	123, SAN ANTONIO, TX 78253		No	12/1/2011	75

Click on the  button.

The Vendor/Payee form displays.

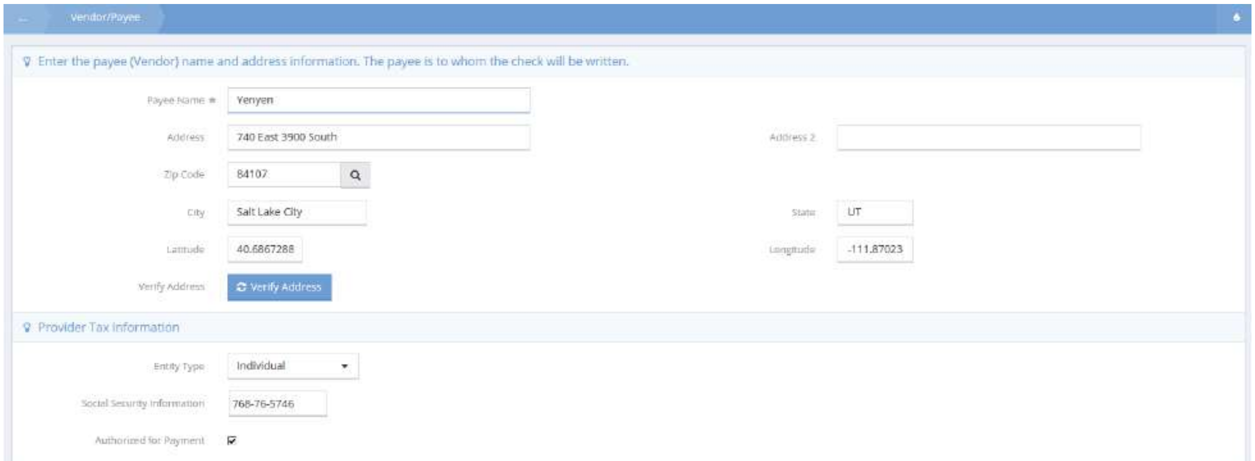


Enter the payee name as well as an address or any other desired details. Click on the Save button.

On the summary form, locate the new vendor and click on the action gear icon associated with it. Select Edit from the pop-up menu that appears.

The Vendor/Payee form displays. Any necessary changes can be made.

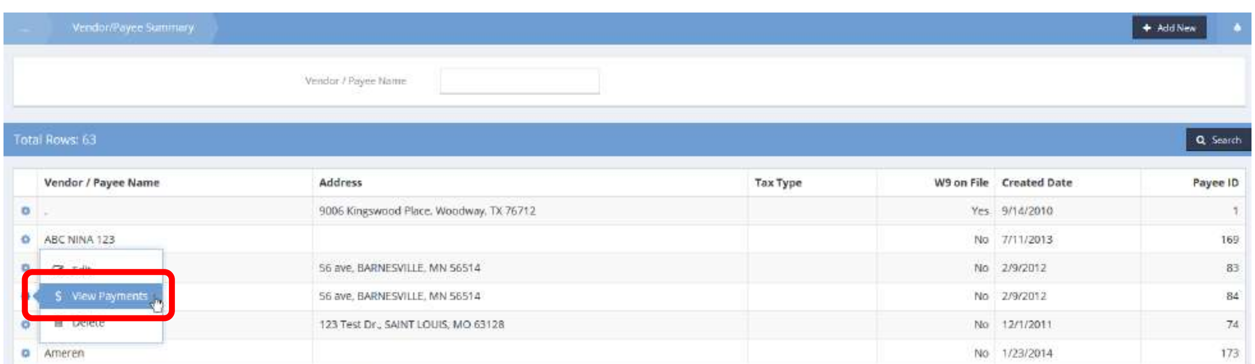
Click on the Save button when finished.



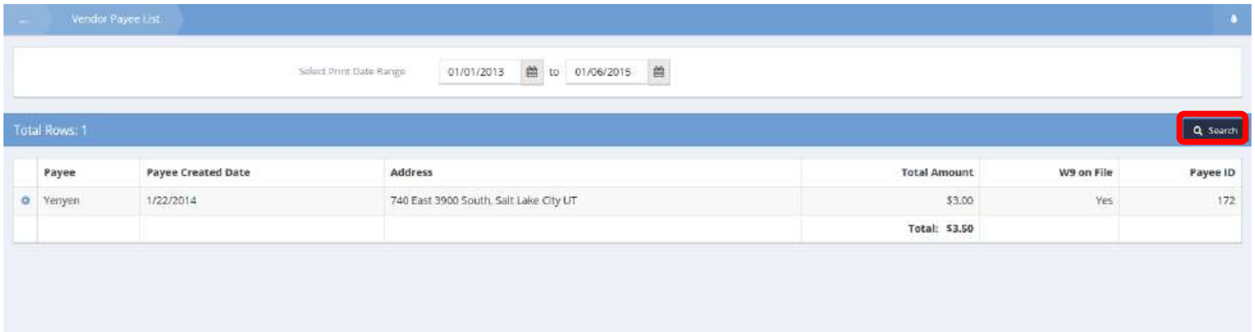
Vendor Payee List

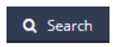
Objective: View a list of payees and view info from payments.

From the Vendor/Payee Summary form, click the action gear icon associated with the desired vendor/payee and select View Payments from the pop up menu that appears.

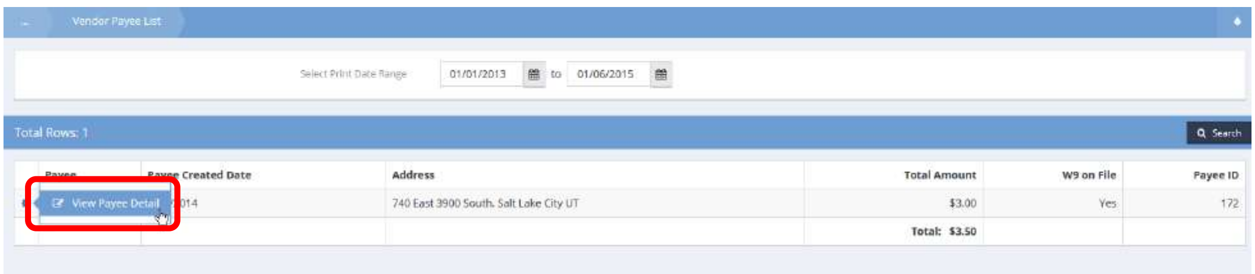


The Vendor Payee List form displays.

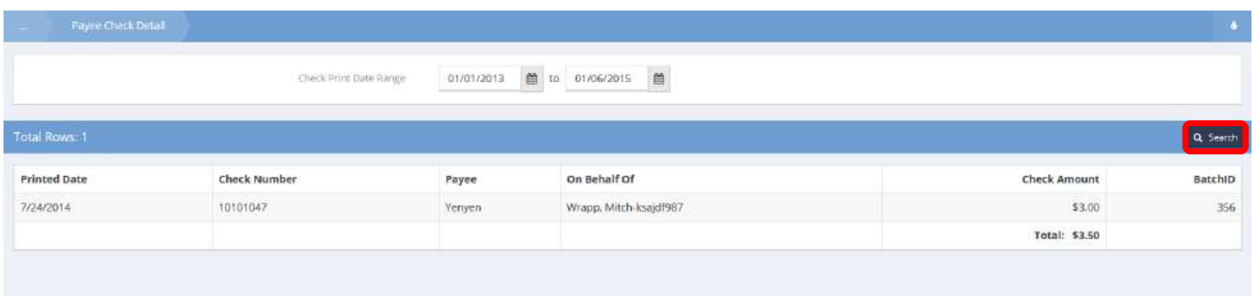


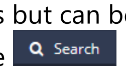
Enter a date range and click on the 

button.



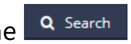
Click on the action gear  icon for the desired row and select View Payee Detail. The Payee Check Detail form displays.



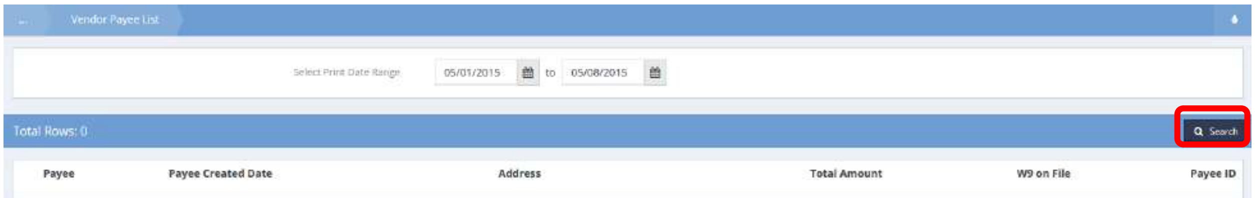
The date range auto-populates with the previously selected dates but can be changed if desired to further filter check details. After the desired date range is set, click on the 

button. The check details display in the spreadsheet below the search parameters.

Payee and Vendor Payments

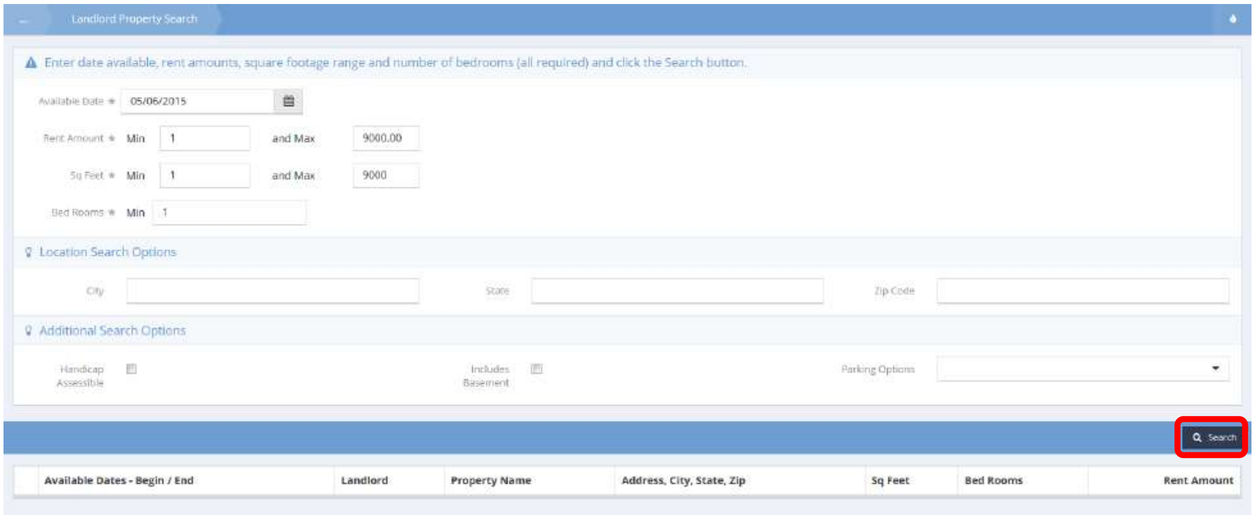
The Vendor Payee List displays a list of vendors. Enter a date range and click the 

button to filter the list.

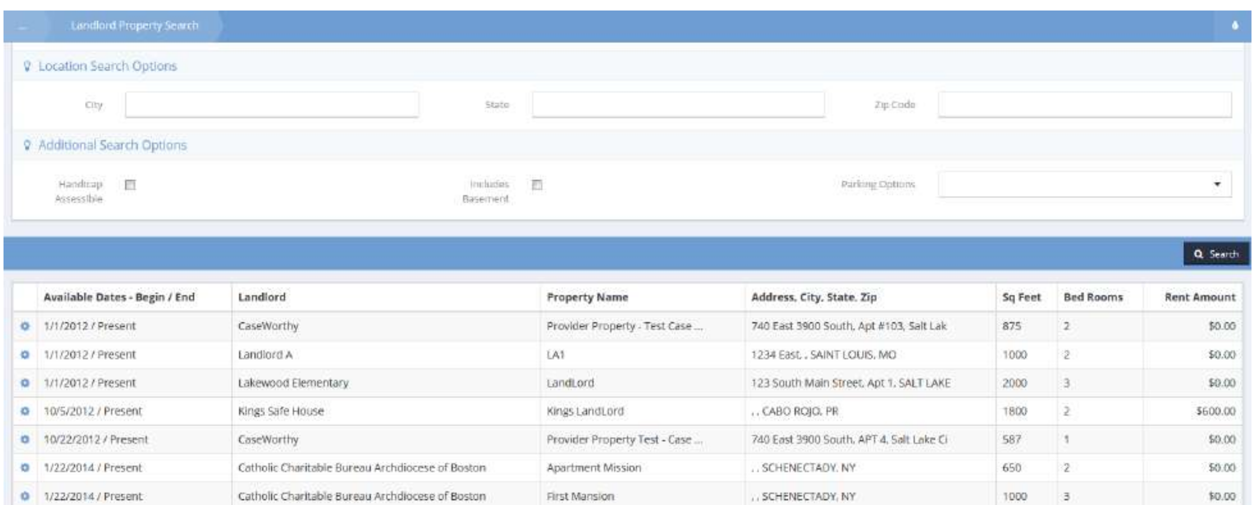


Property Search

Using the Landlord Property Search form, properties may be located based on desired parameters.

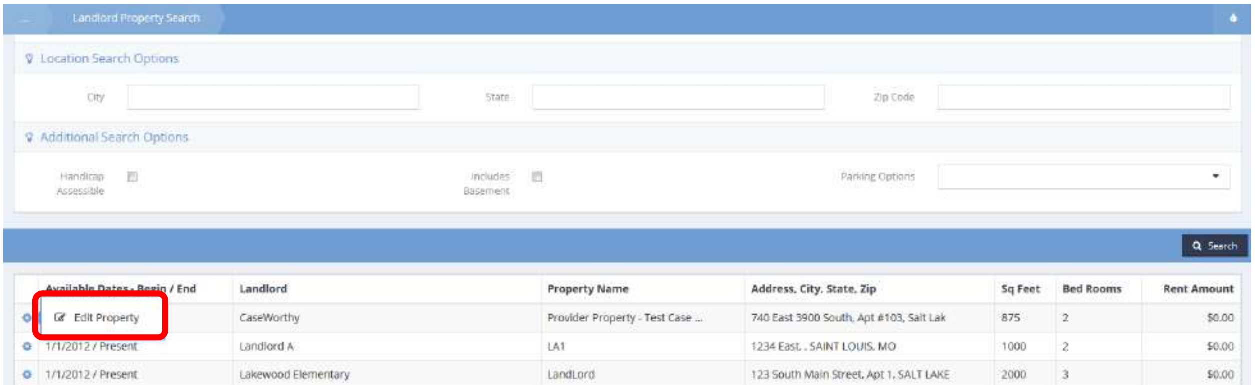


Enter an available date, range of rent amount, range of square feet, and the minimum number of bedrooms. Enter location search parameters and select any additional search options if desired. Click the Search button and all properties within the entered parameters display in the spreadsheet below.

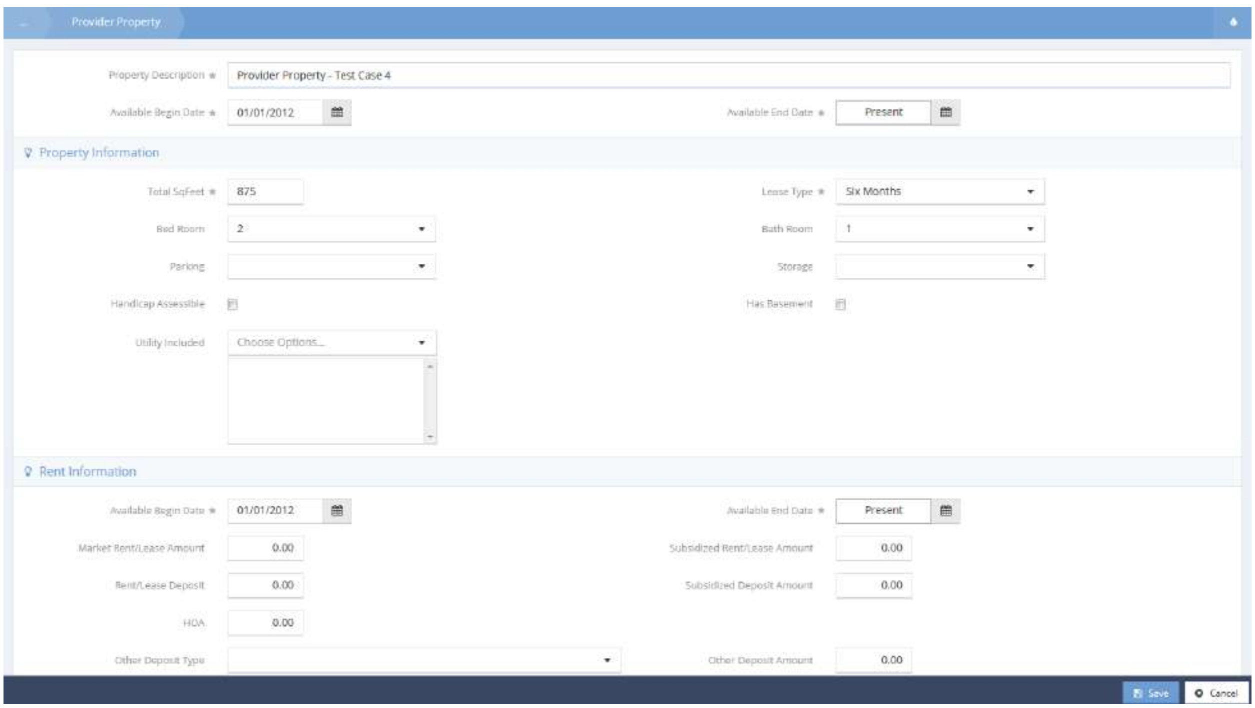


To edit a property, click the action gear and click Edit Property.

The Provider Property form displays.

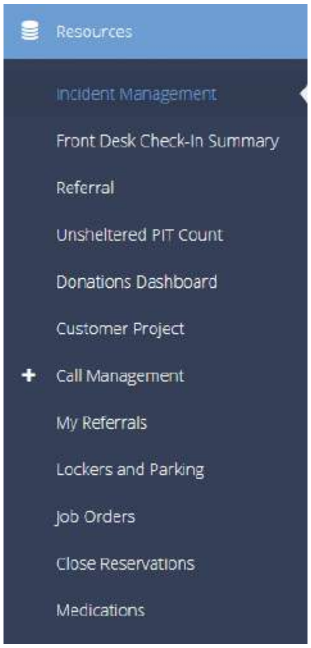


Make any changes and click Save when finished.



Resources

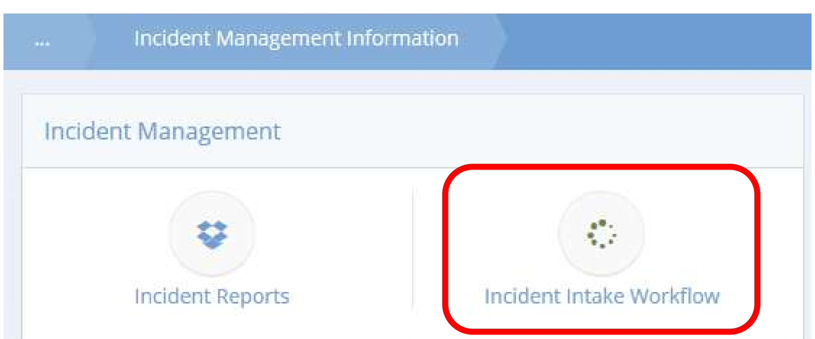
Incident Management



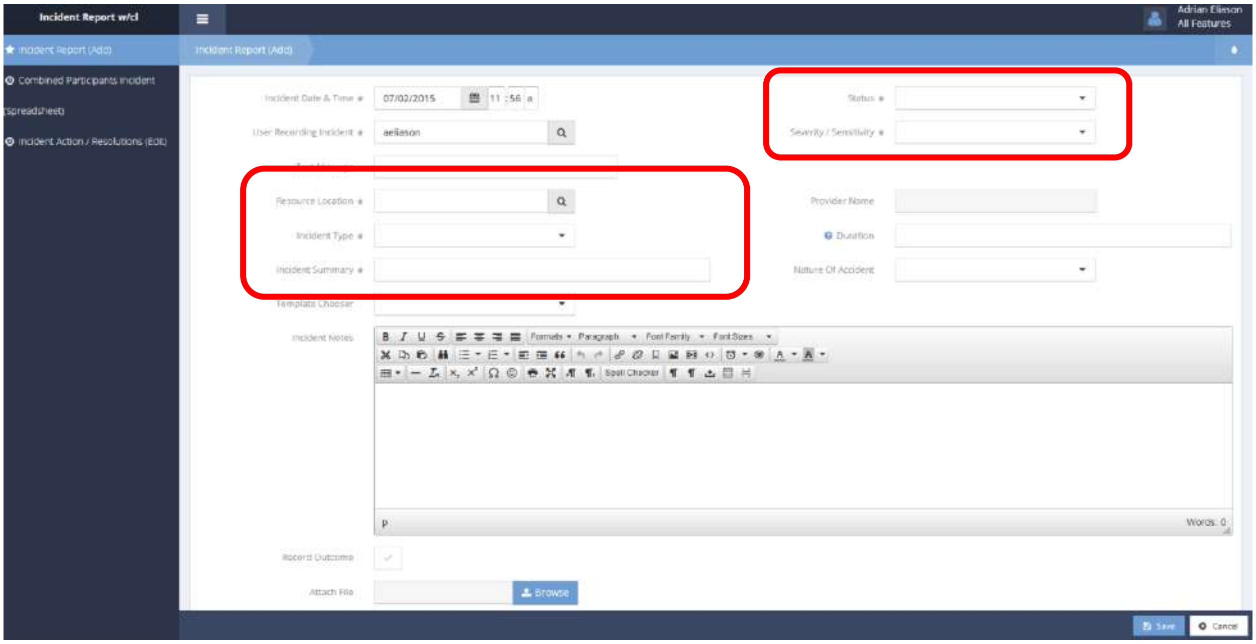
The first menu item in the Resources menu group is the "Incident Management" dashboard. From here, the user can track and view all of their organization's incident reports.

Incident Intake Workflow

Objective: Create new incident report in a workflow.

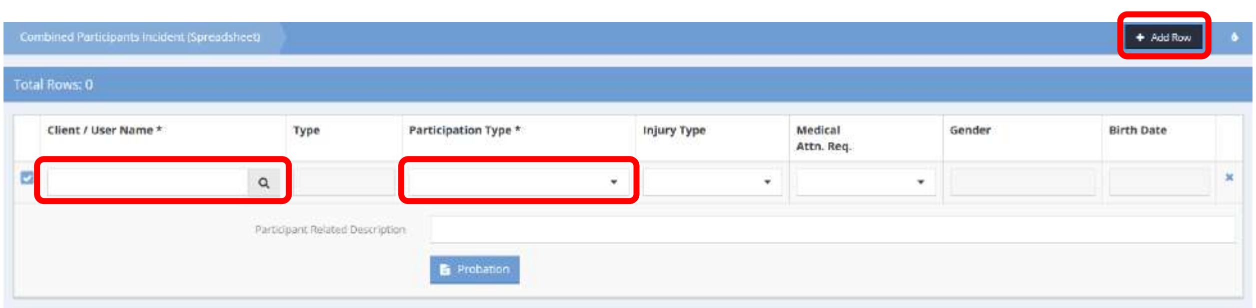


Click the icon for the Incident Intake Workflow. The workflow opens in a new window.

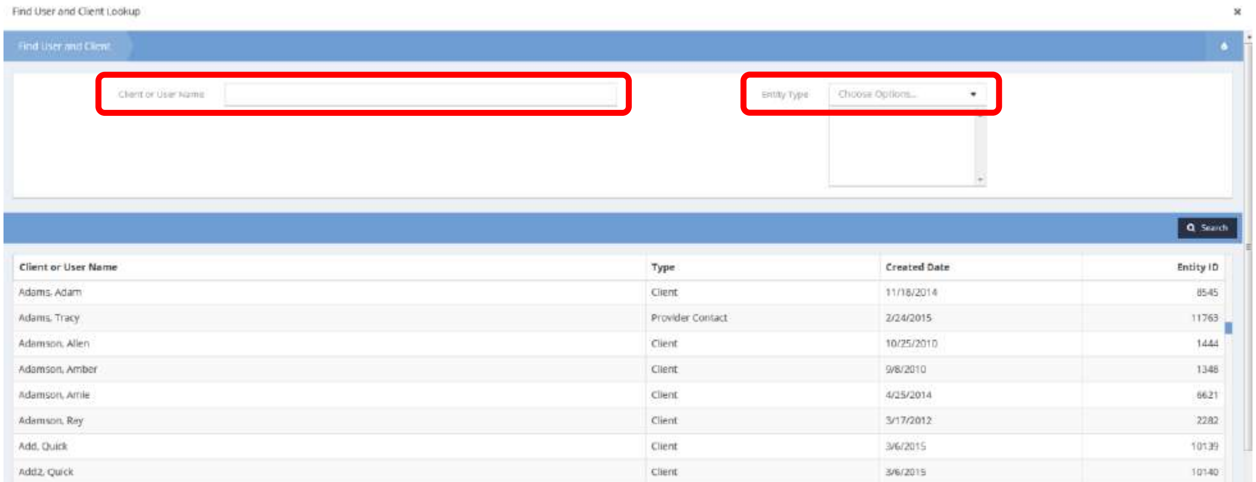


On the first step of the workflow, select a status, severity/sensitivity, resource location, incident type and enter an incident summary. Add any other information as desired. Click the Save button to proceed to the next step.

The Combined Participants Incident (Spreadsheet) form displays.



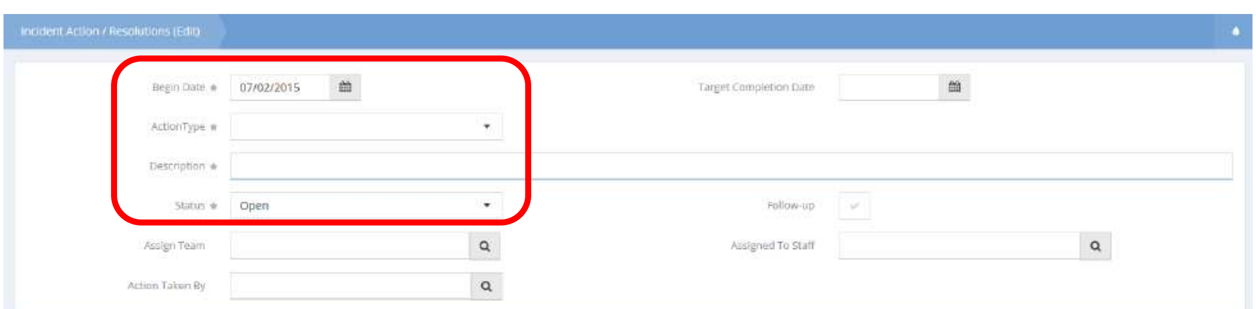
Use the Add Row button to add a participant. Select a participation type from the drop-down list and enter any other desired info. Click the magnifying glass lookup icon. The Find User and Client Lookup form displays.



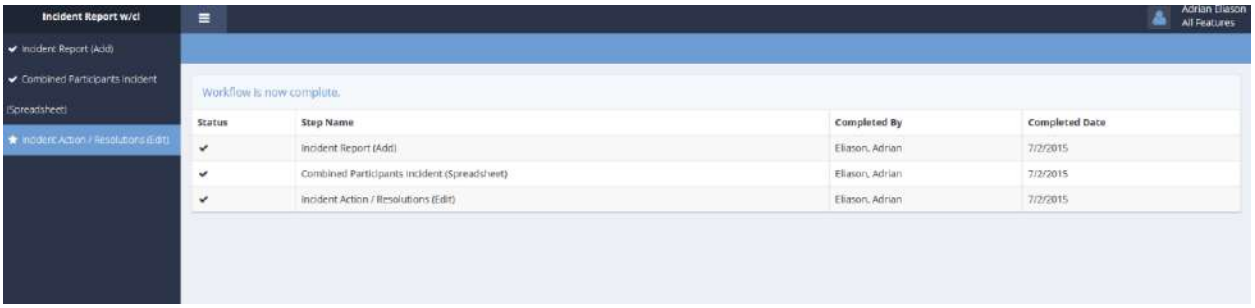
Use the filters and Search button to locate the desired client or user and when found, click to return to the previous form.

Once all required fields have been completed click Save to proceed to the next step of the workflow.

The Incident Action / Resolutions (Edit) form displays. Select an action type from the drop-down list, enter a description and select the status from the drop-down list.

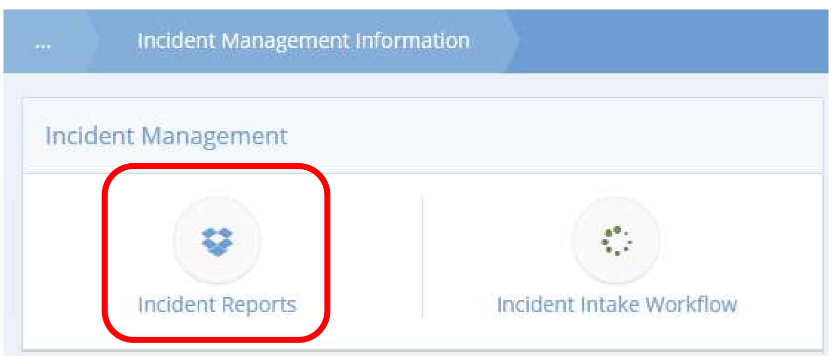


Enter any other desired fields and click  when finished. The workflow is now complete and the incident has been recorded.

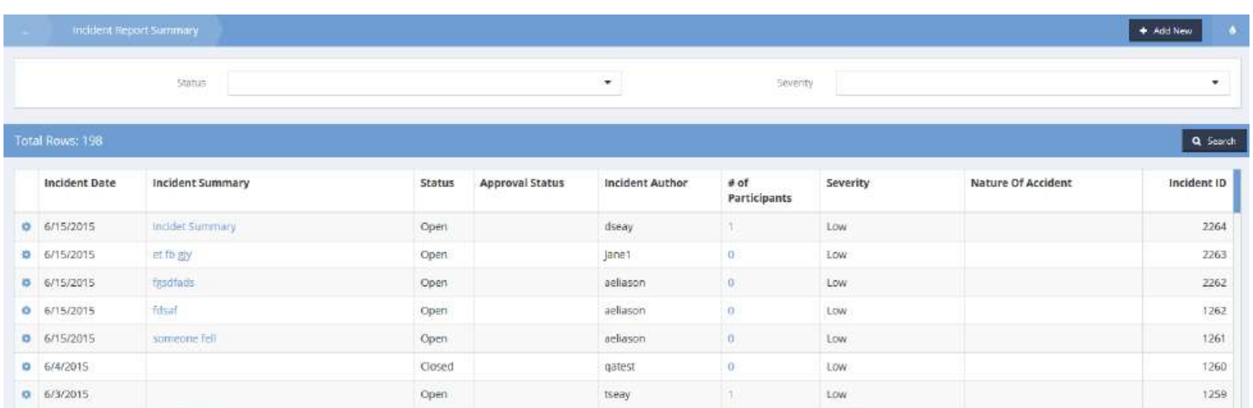


View Files (Incident Management)

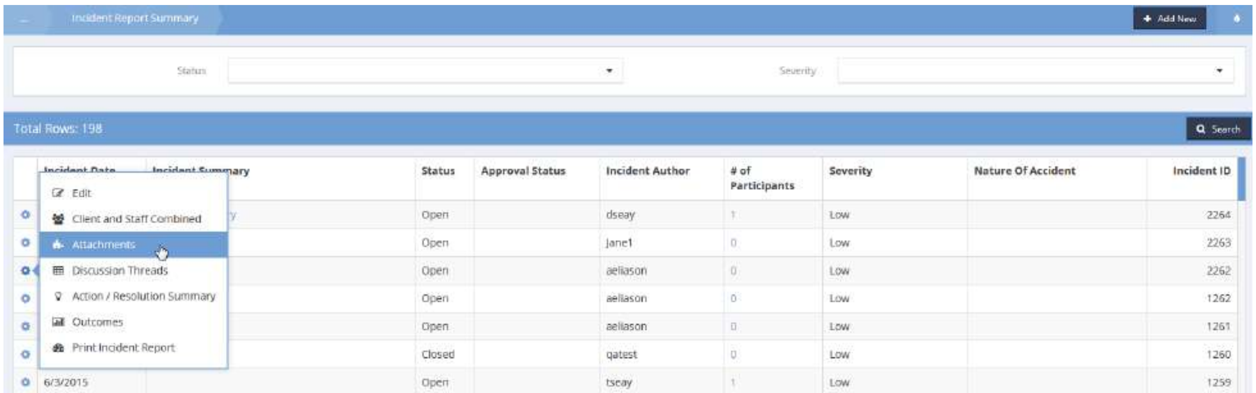
Objective: View or add files in an incident report.



Click the icon for Incident Reports. The Incident Report Summary form displays.

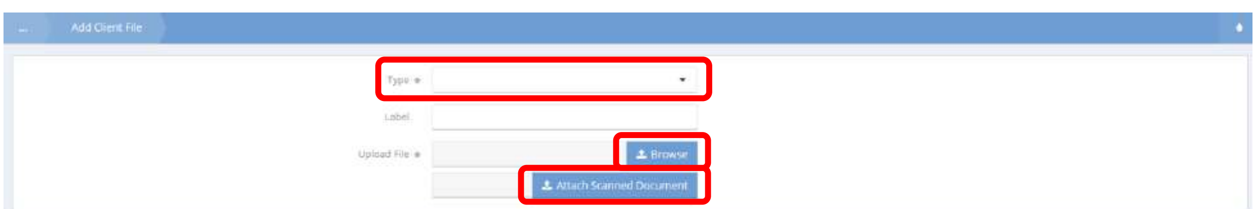


Click the action gear icon associated with the desired incident and select Attachments from the pop up menu that appears.



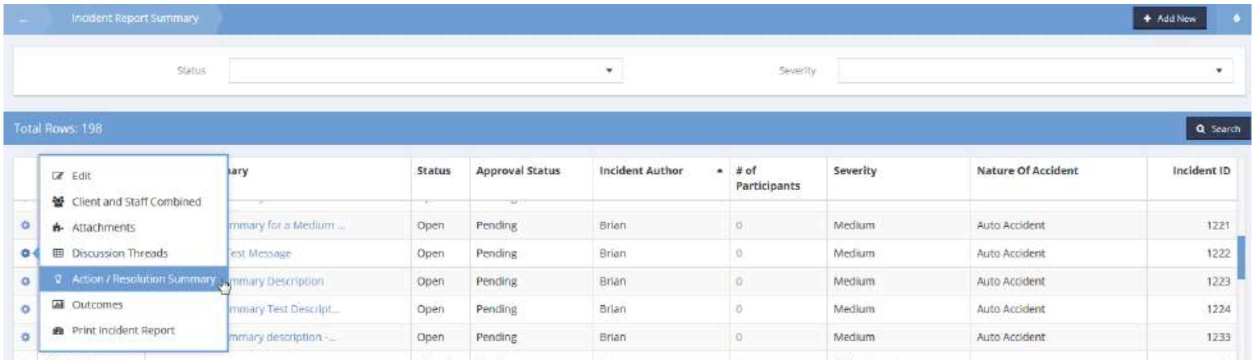
The View Incident Activity Files form displays. To add a new file to the incident report, click the Add New button.

The Add Client File form displays.



Select a file type from the drop-down list and use the Browse button to locate the desired file on the computer being used. Alternatively, if using a scanner simply click the Attach Scanned Document button. Click Save when finished.

To view a summary of actions and resolutions, click the relevant action gear icon and select Action / Resolution Summary from the pop up menu that appears.

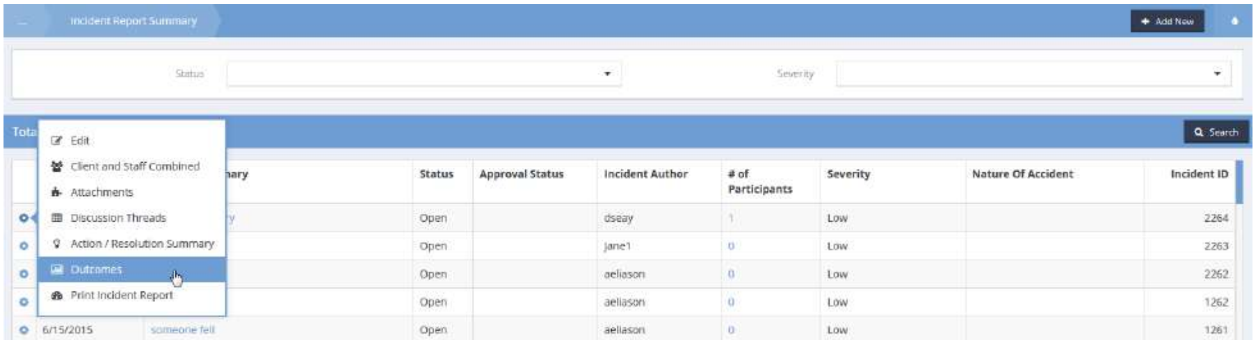


The Action Resolution form displays. Click the Add New button to add a new (or click the action gear icon and click Edit to edit an existing) action resolution.

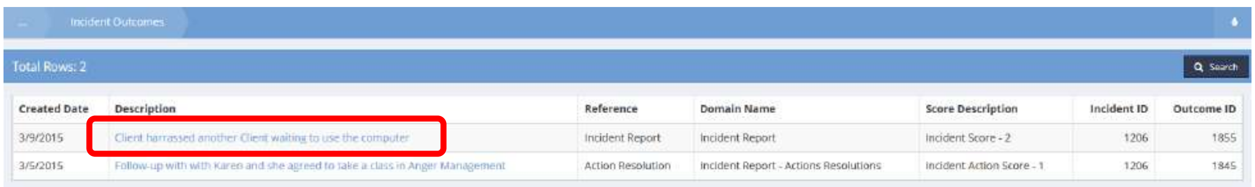
The Incident Action / Resolutions (Edit) form displays.

Select an action type, add a description and select a status. Add any other desired information and click Save when finished.

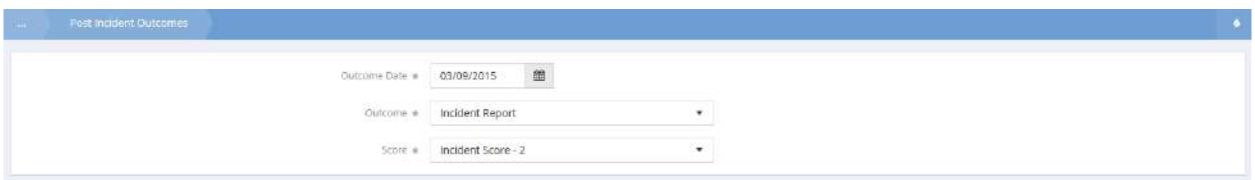
To view incident outcomes, click the relevant action gear icon and select Outcomes.



The Incident Outcomes form displays.

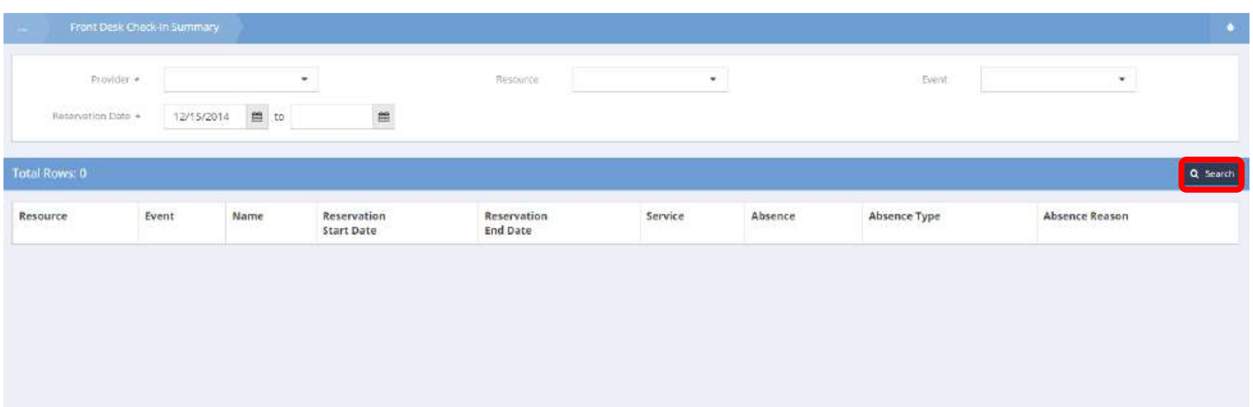


To edit an outcome, click the blue hyperlinked text. The Post Incident Outcomes form displays. Enter any desired changes and click Save when finished.

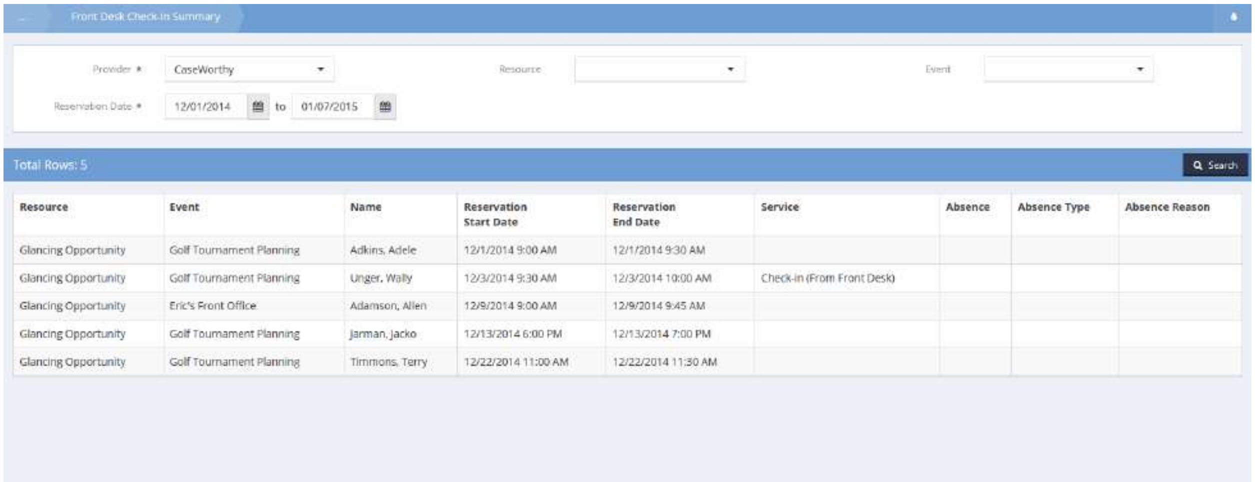


Front Desk Check-in Summary

Objective: View a summary of check-in events. Can be filtered by provider, resource, event, and dates.



On the Front Desk Check-in Summary form, enter a provider and date range. Optionally choose a resource and event. Click the Search button. Results display in the area below the search parameters.


Front Desk Check-in Summary

Provider * CaseWorthy
Resource
Event
Reservation Date * 12/01/2014 to 01/07/2015

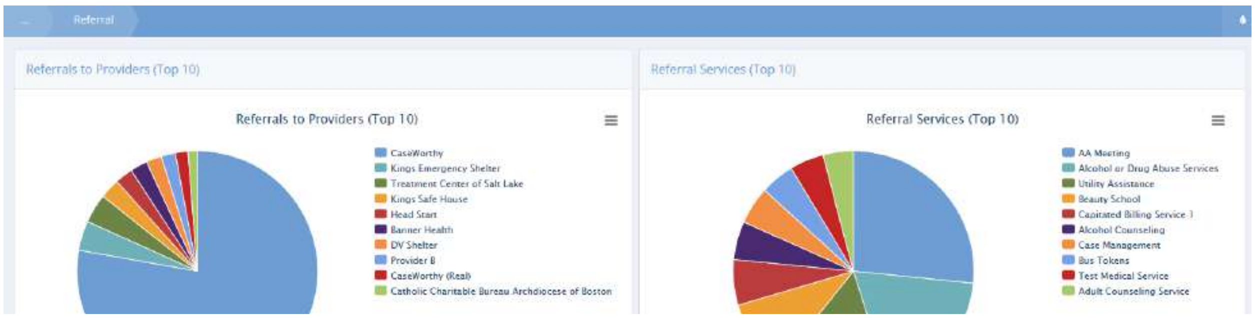
Total Rows: 5
Search

Resource	Event	Name	Reservation Start Date	Reservation End Date	Service	Absence	Absence Type	Absence Reason
Glancing Opportunity	Golf Tournament Planning	Adkins, Adele	12/1/2014 9:00 AM	12/1/2014 9:30 AM				
Glancing Opportunity	Golf Tournament Planning	Unger, Wally	12/3/2014 9:30 AM	12/3/2014 10:00 AM	Check-in (From Front Desk)			
Glancing Opportunity	Eric's Front Office	Adamson, Allen	12/9/2014 9:00 AM	12/9/2014 9:45 AM				
Glancing Opportunity	Golf Tournament Planning	Jarman, Jacko	12/13/2014 6:00 PM	12/13/2014 7:00 PM				
Glancing Opportunity	Golf Tournament Planning	Timmons, Terry	12/22/2014 11:00 AM	12/22/2014 11:30 AM				

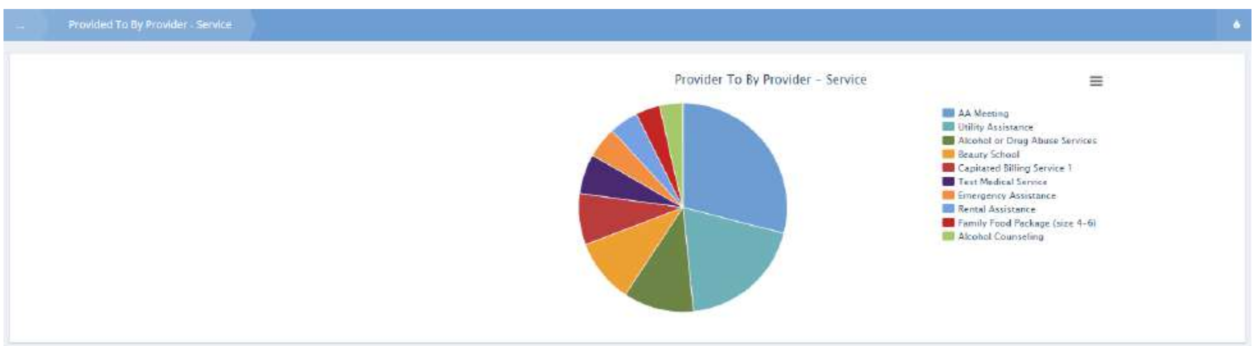
Referrals

Provided To By Provider – Service

Objective: View service referrals provided by a provider.

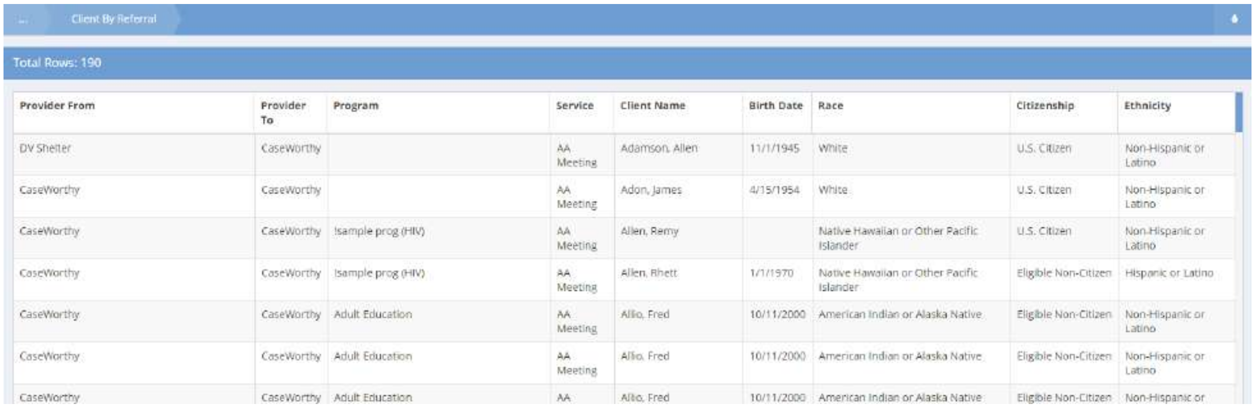


Click the Referrals to Providers chart. The Provided To By Provider – Service form displays.



To view referrals in detail, click an item in the pie chart.

The Client By Referral form displays. All relevant referrals display in the form.


Client By Referral

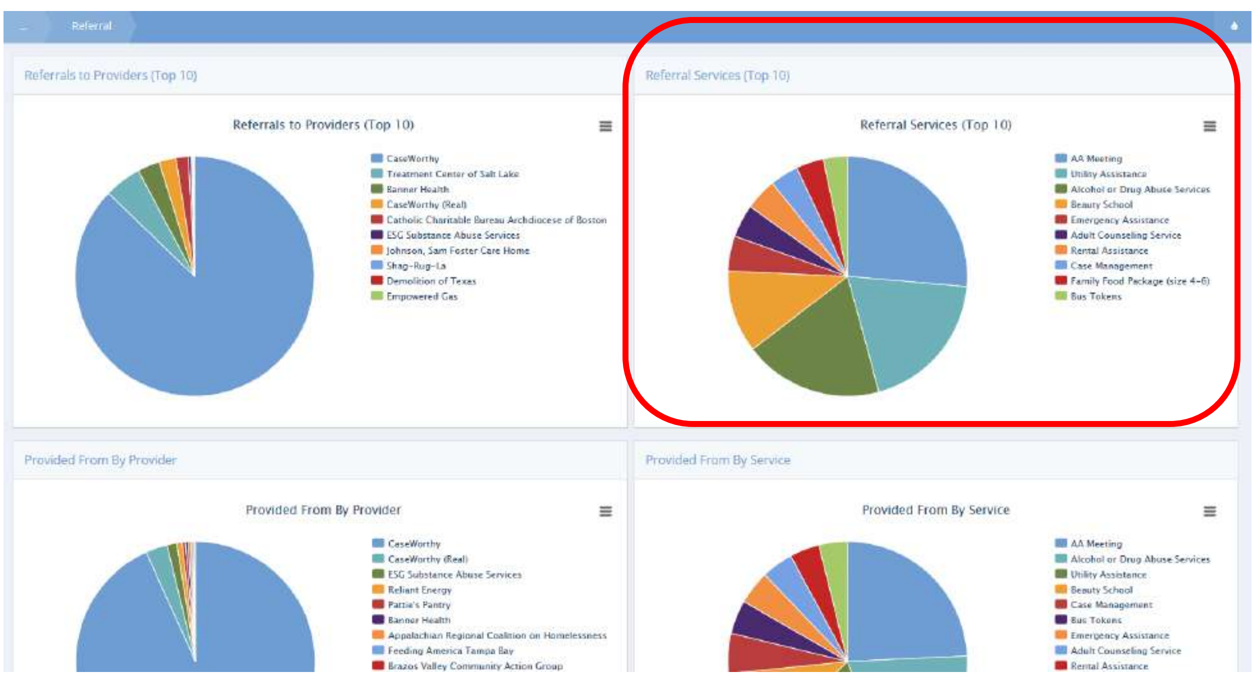
Total Rows: 190

Provider From	Provider To	Program	Service	Client Name	Birth Date	Race	Citizenship	Ethnicity
DV Shelter	CaseWorthy		AA Meeting	Adamson, Allen	11/1/1945	White	U.S. Citizen	Non-Hispanic or Latino
CaseWorthy	CaseWorthy		AA Meeting	Adon, James	4/15/1954	White	U.S. Citizen	Non-Hispanic or Latino
CaseWorthy	CaseWorthy	!sample prog (HIV)	AA Meeting	Allen, Remy		Native Hawaiian or Other Pacific Islander	U.S. Citizen	Non-Hispanic or Latino
CaseWorthy	CaseWorthy	!sample prog (HIV)	AA Meeting	Allen, Rhett	1/1/1970	Native Hawaiian or Other Pacific Islander	Eligible Non-Citizen	Hispanic or Latino
CaseWorthy	CaseWorthy	Adult Education	AA Meeting	Allio, Fred	10/11/2000	American Indian or Alaska Native	Eligible Non-Citizen	Non-Hispanic or Latino
CaseWorthy	CaseWorthy	Adult Education	AA Meeting	Allio, Fred	10/11/2000	American Indian or Alaska Native	Eligible Non-Citizen	Non-Hispanic or Latino
CaseWorthy	CaseWorthy	Adult Education	AA	Allio, Fred	10/11/2000	American Indian or Alaska Native	Eligible Non-Citizen	Non-Hispanic or

Client By Referral

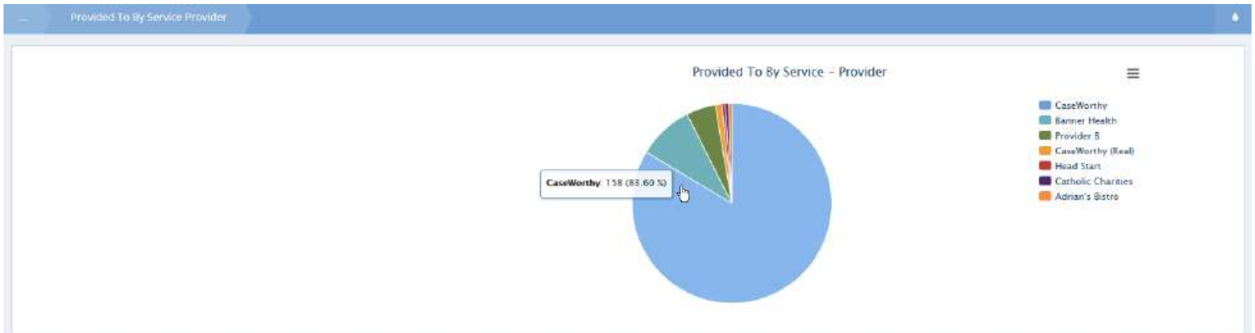
Objective: View and drill into client referral data.

The Referral dashboard displays. The dashboard consists of four graphic displays; Referrals to Providers (Top 10), Referral Services (Top 10), Provided From By Provider and Provided From By Service.



Click on the Referral Services (Top 10) window. The Provided To By Service - Provider form displays a graphical representation of the data.

Hover over any slice of the pie chart to see the pop up label.



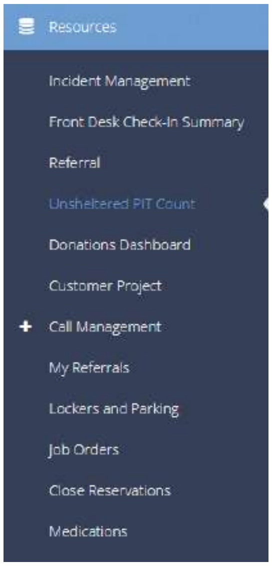
Click on any slice of the pie chart to display the drill down spreadsheet of the data on the Client By Referral form.

Client By Referral

Total Rows: 155

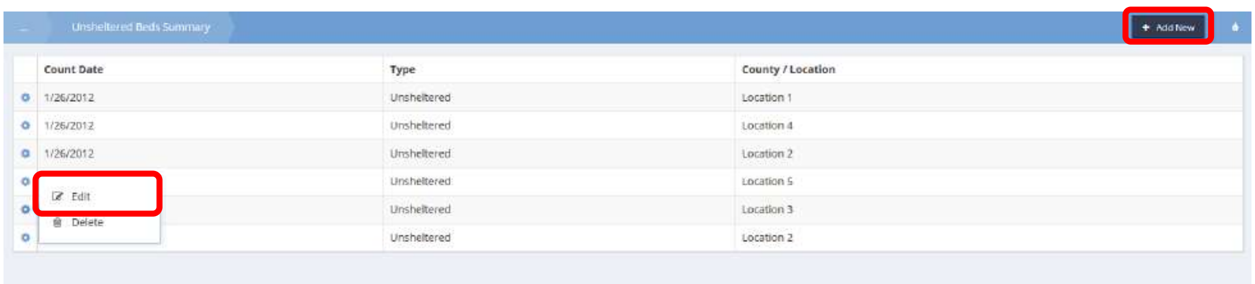
Provider From	Provider To	Program	Service	Client Name	Birth Date	Race	Citizenship	Ethnicity
DV Shelter	CaseWorthy		AA Meeting	Adamson, Allen	11/1/1945	White	U.S. Citizen	Non-Hispanic or La
CaseWorthy	CaseWorthy		AA Meeting	Adon, James	4/15/1954	White	U.S. Citizen	Non-Hispanic or La
CaseWorthy	CaseWorthy	Isample prog (HIV)	AA Meeting	Allen, Remy		Native Hawaiian or Other Pacific Islander	U.S. Citizen	Non-Hispanic or La
CaseWorthy	CaseWorthy	Isample prog (HIV)	AA Meeting	Allen, Rhett	1/1/1970	Native Hawaiian or Other Pacific Islander	Eligible Non-Citizen	Hispanic or Latino
CaseWorthy	CaseWorthy	Adult Education	AA Meeting	Allio, Fred	10/11/2000	American Indian or Alaska Native	Eligible Non-Citizen	Non-Hispanic or La
CaseWorthy	CaseWorthy	Adult Education	AA Meeting	Allio, Fred	10/11/2000	American Indian or Alaska Native	Eligible Non-Citizen	Non-Hispanic or La
CaseWorthy	CaseWorthy	Adult Education	AA Meeting	Allio, Fred	10/11/2000	American Indian or Alaska Native	Eligible Non-Citizen	Non-Hispanic or La
CaseWorthy	CaseWorthy	Adult Education	AA Meeting	Allio, Fred	10/11/2000	American Indian or Alaska Native	Eligible Non-Citizen	Non-Hispanic or La

Unsheltered PIT Count

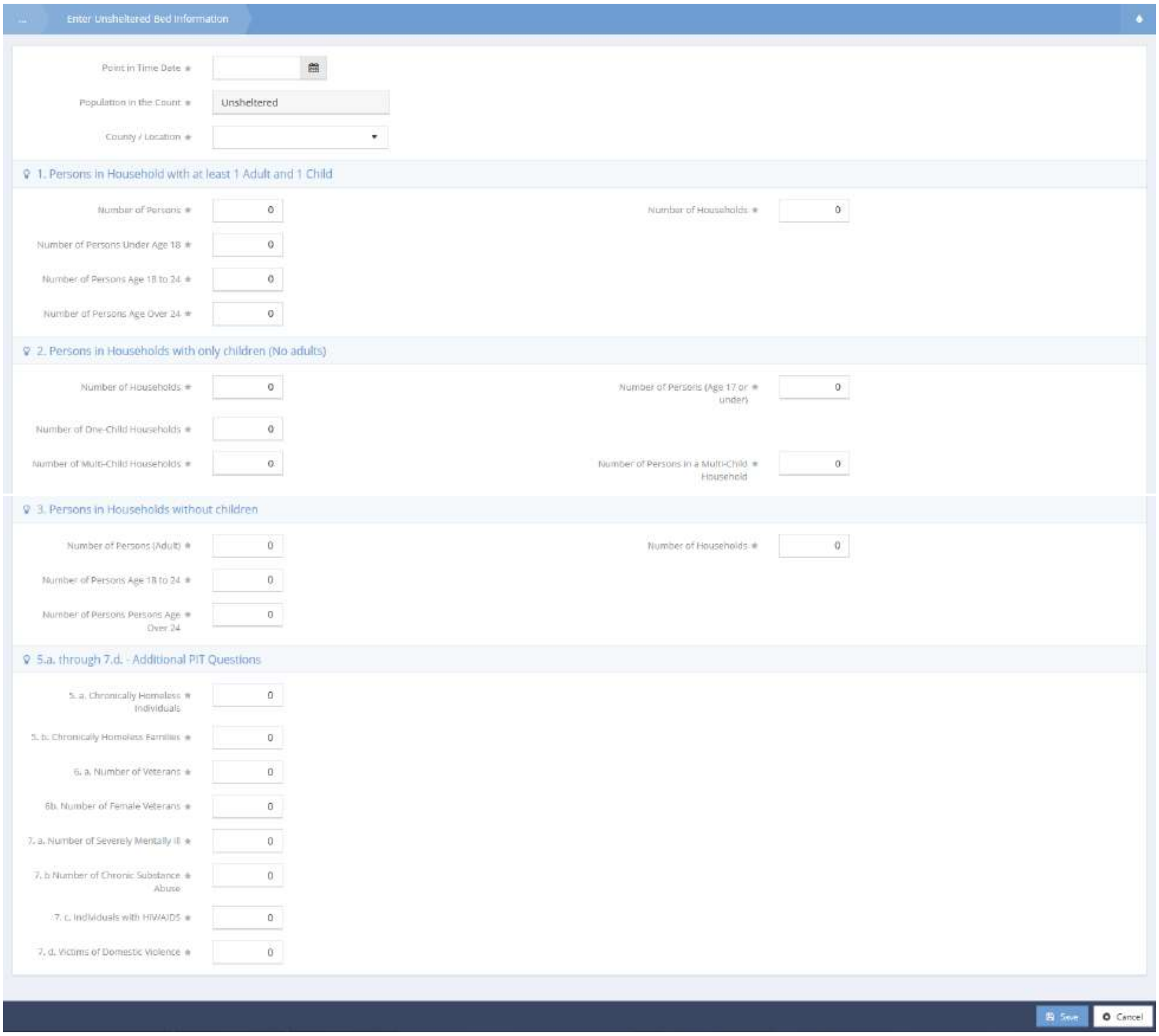


The Unsheltered PIT Count area allows users to enter their Unsheltered Point-In-Time Counts.

On the Unsheltered Beds Summary, either select edit from the action gear pop up menu or click on the **+ Add New** button.

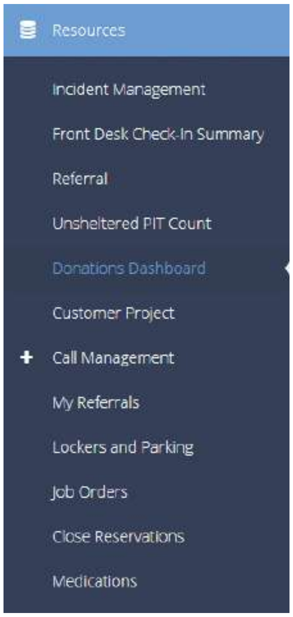


The Enter Unsheltered Bed Information form displays.

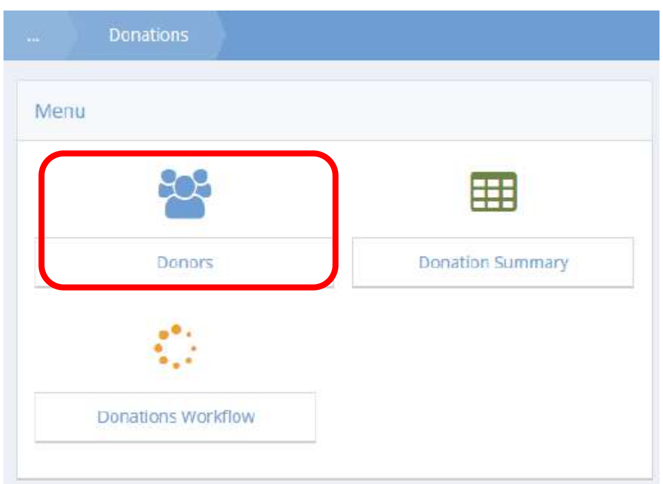


All fields are required. Enter all information and click on the  button.

Donations



The Donations Dashboard allows donations to be entered into the system. Different work flows display depending on whether the donation is monetary, or an item for inventory, such as furniture or clothing.



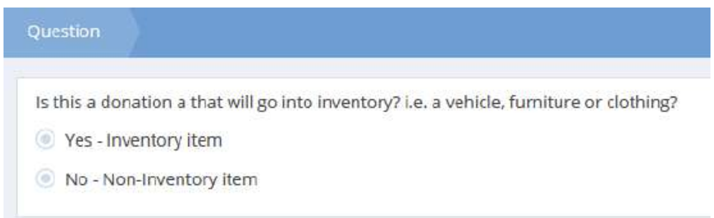
Click on the Donors icon.

The Summary of Donations Grouped by Donor form displays.

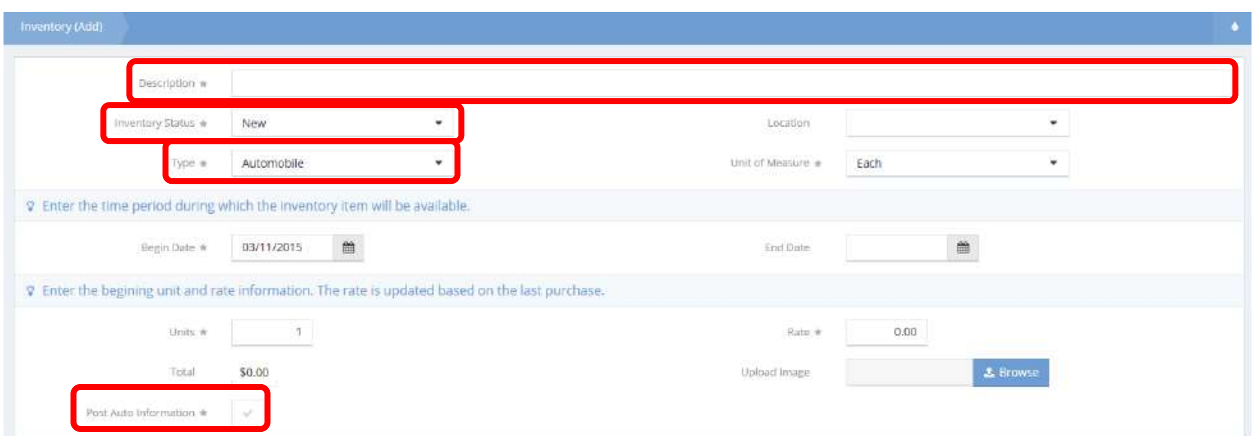
To add a donation, select the 

button.

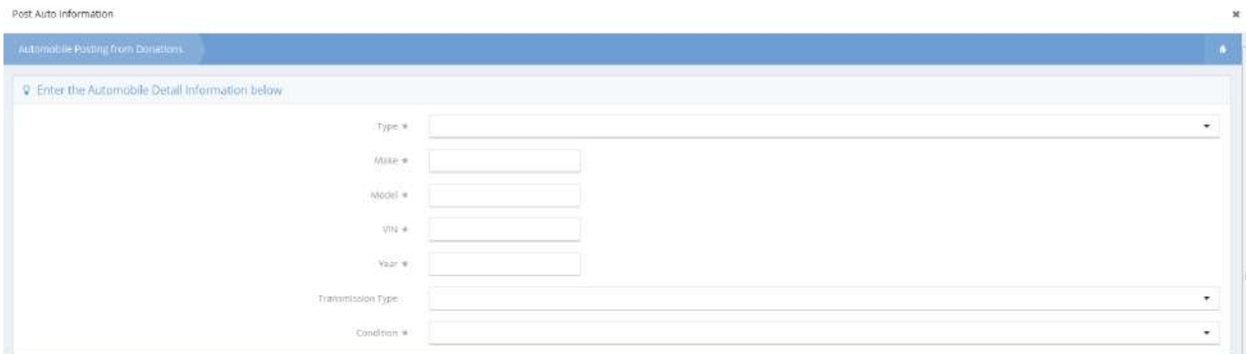
The workflow begins with a question form. Select the donation type by answering the question presented.



If the donation is an inventory item, the resulting form requires a description of the item, an inventory status, the type of donation, when the donation will be available, and how much is being donated.



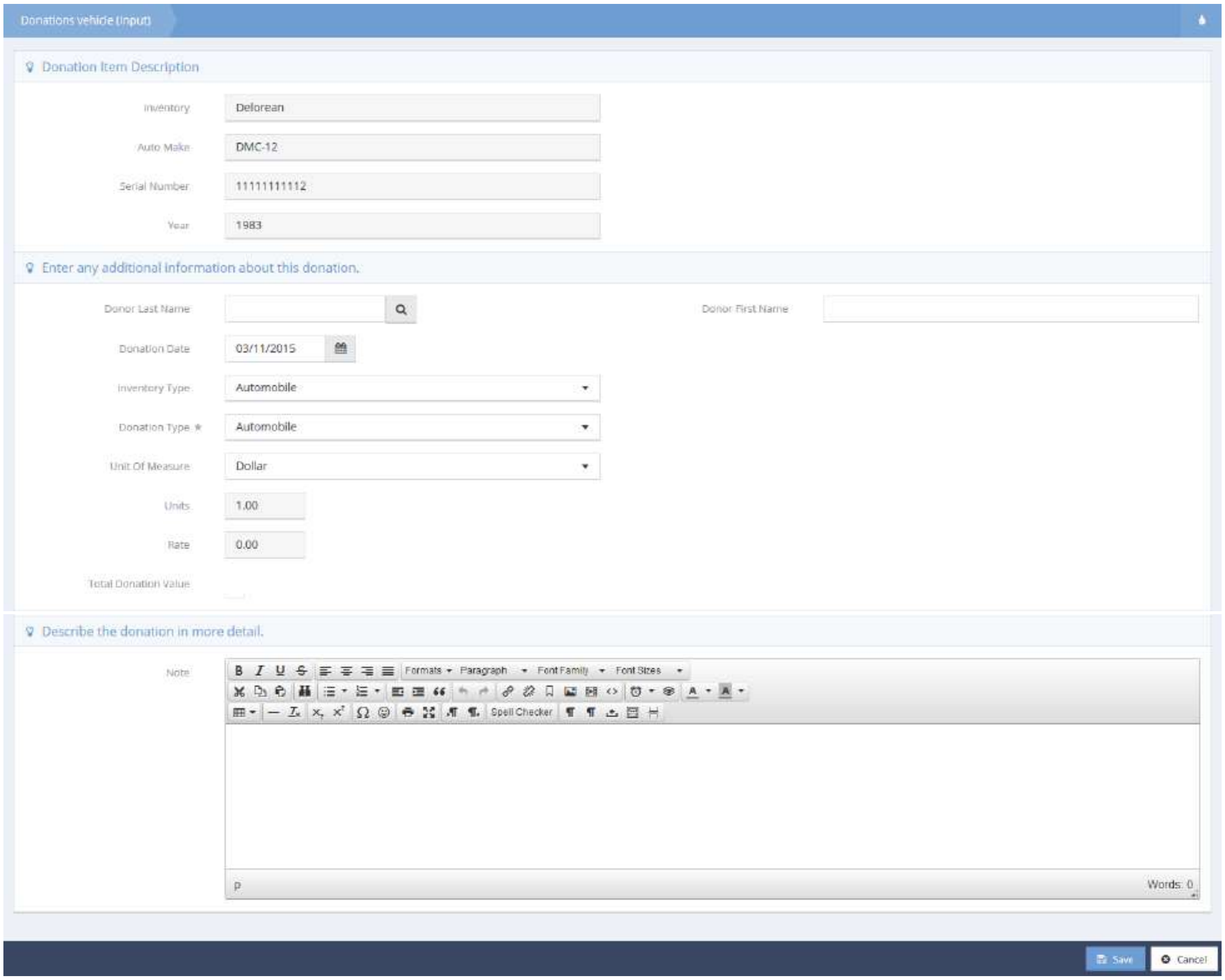
If the donation item is an automobile, the resulting form requires information such as vehicle type and Vehicle Identification Number.



Once all the required information is entered, select the 

button.

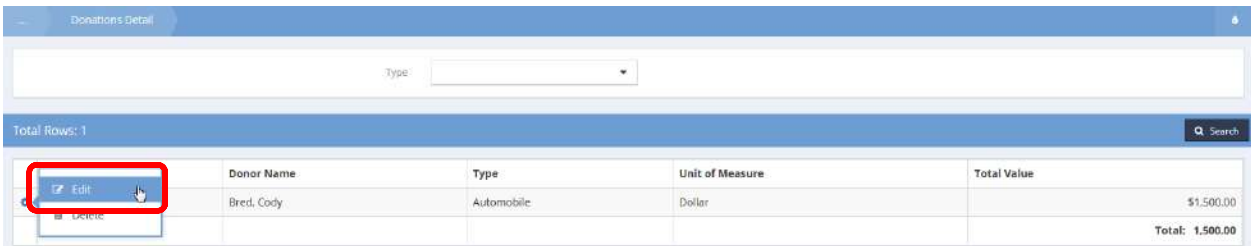
Another form pops up requesting the donor's name, and verification of the information entered earlier. There is also an area to add additional information about the donation.

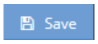


To view the detail of a donation, click on the action gear icon for the desired entry. Select Detail from the pop-up menu that appears.

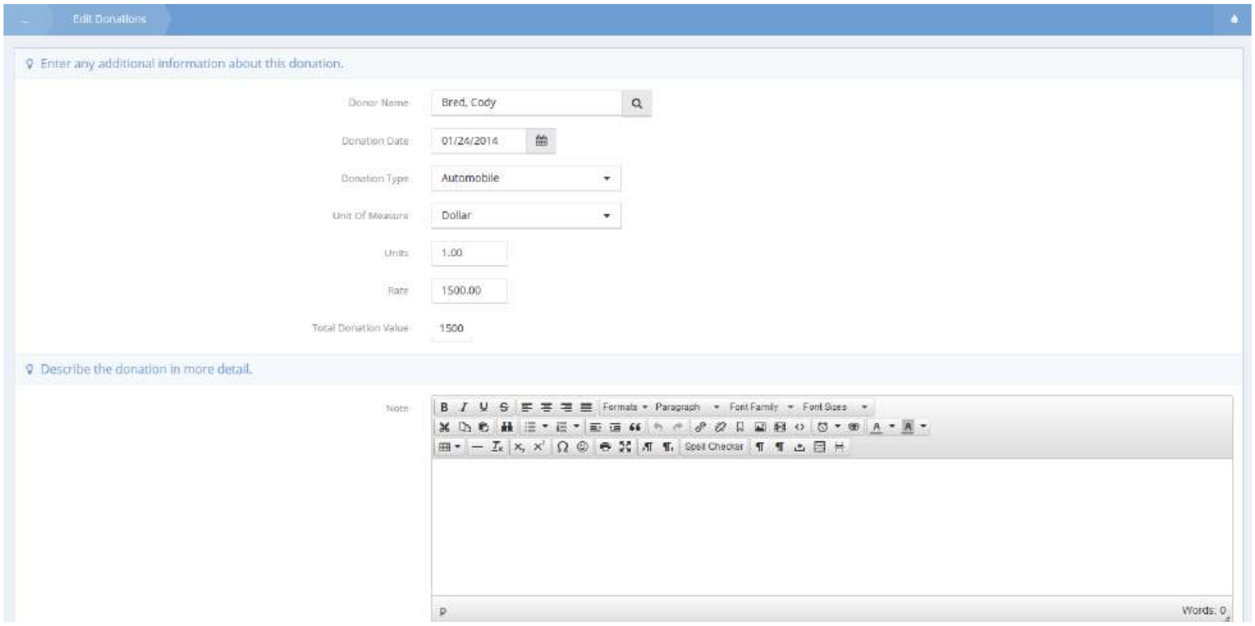
The Donations Detail form displays.

To edit a donation, click on the action gear for the desired donation and select Edit from the pop-up menu that appears.



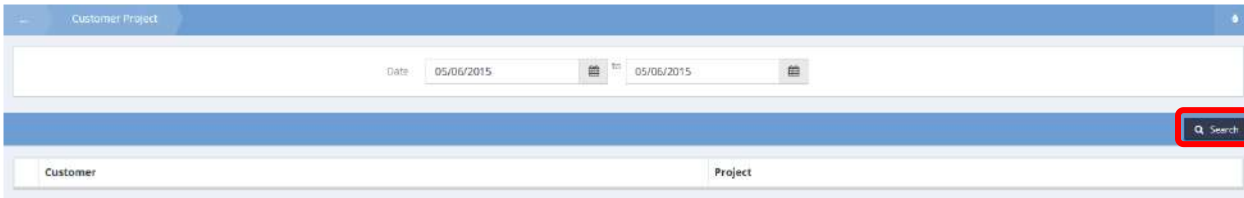
The Edit Donations form displays. Make any desired changes to the donation information and click on the 

button.

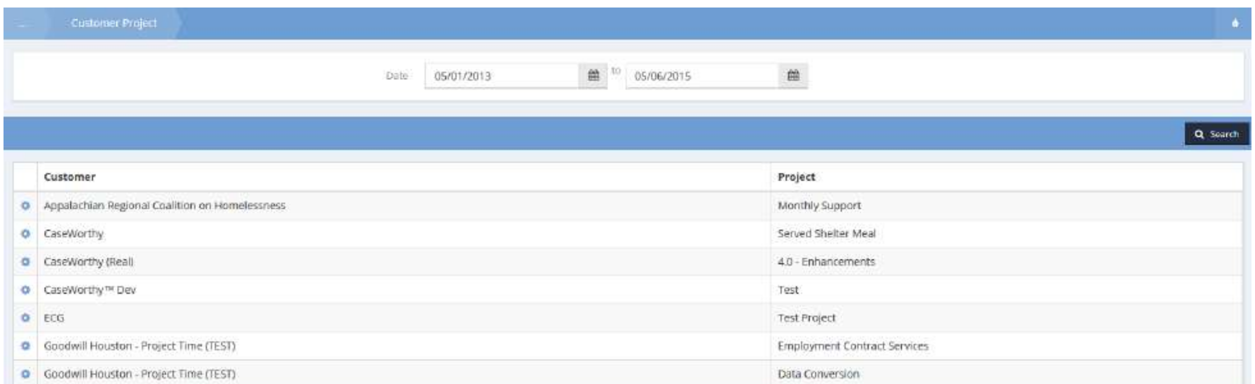


Customer Project

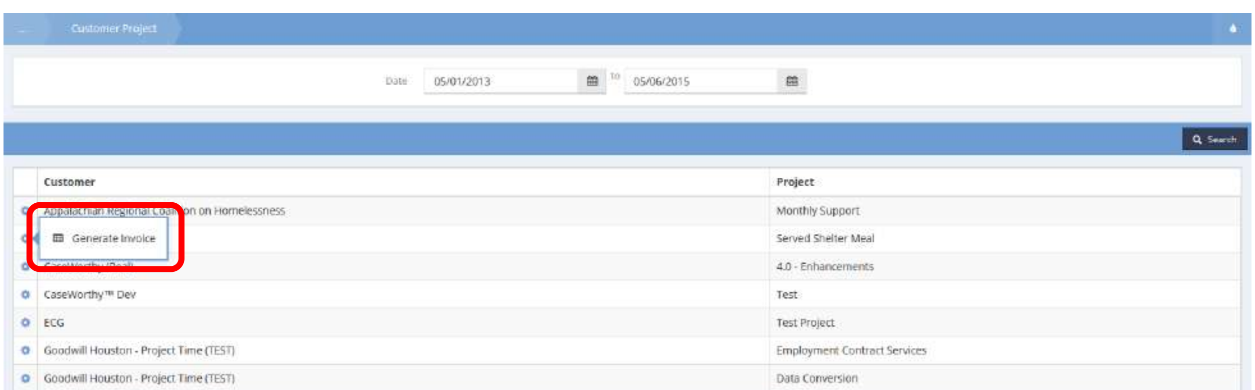
Using the Customer Project form, a project can be looked up and an invoice can be generated for it.



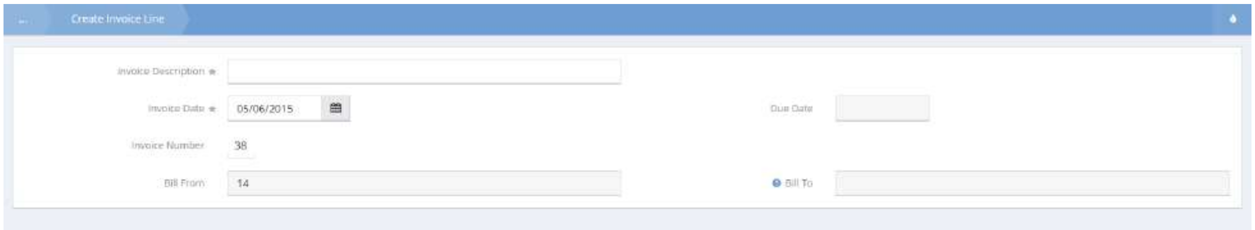
Enter a date range and click the Search button. Projects display in the spreadsheet below.



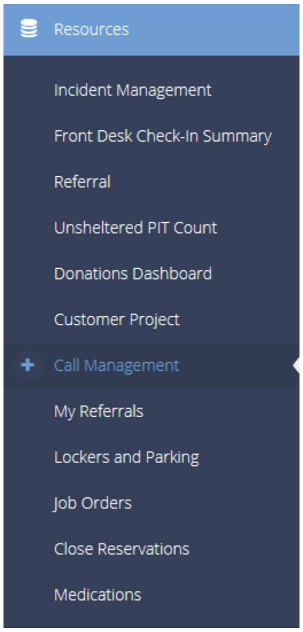
To generate an invoice, click the action gear and click Generate Invoice. The Create Invoice Line form displays.



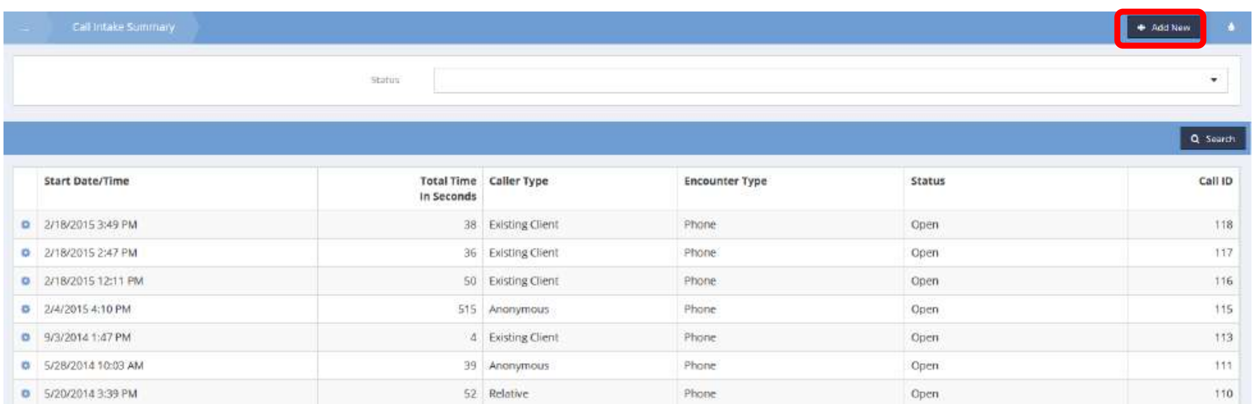
Enter a date and description and click the  button.



Call Management

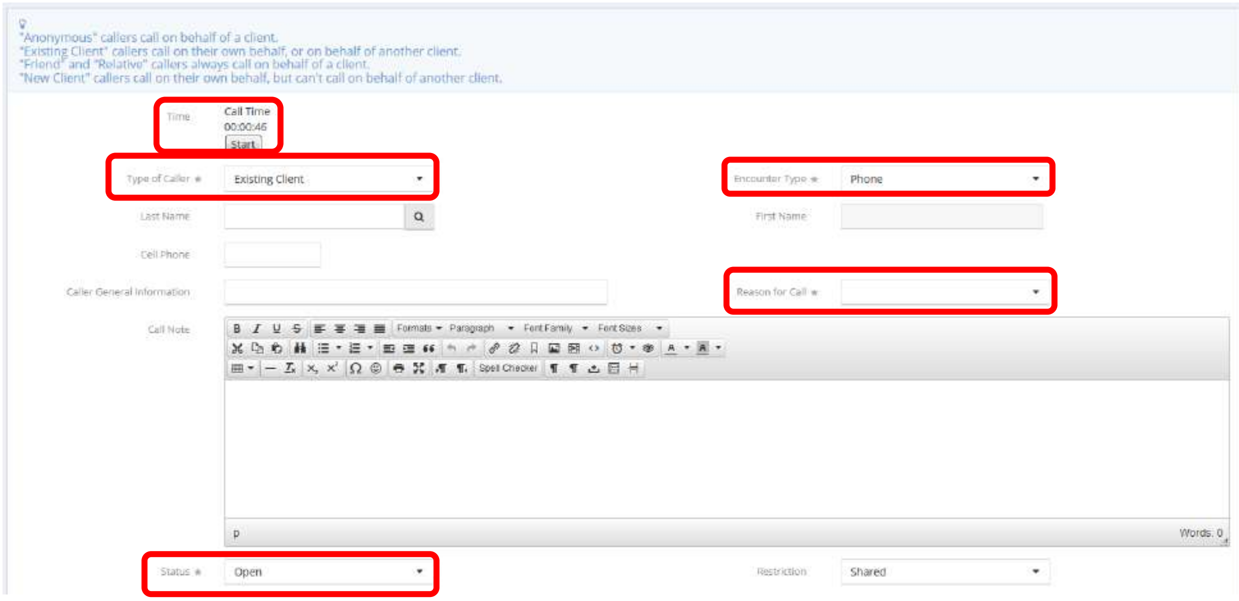


The next menu item in the Resources menu group is the "Call Management" summary form. This form allows users to track details related to incoming phone calls or walk-in information requests. Click the Add New button to create a new call intake item.

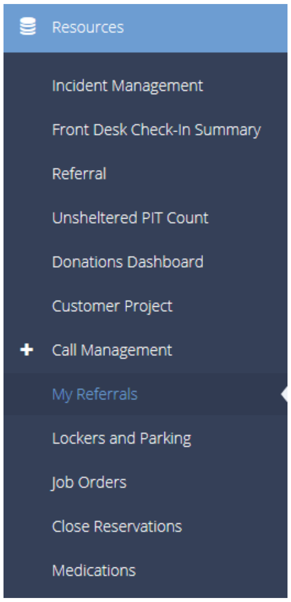


Select the type of caller and an encounter type. Next, select a reason for the call and a status. Using the Start button and Stop button at the top of the form, starts and stops the timer as needed.

If necessary, add caller general information and a call note.

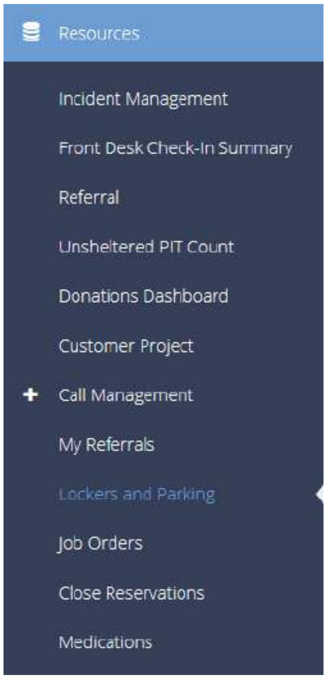


My Referrals

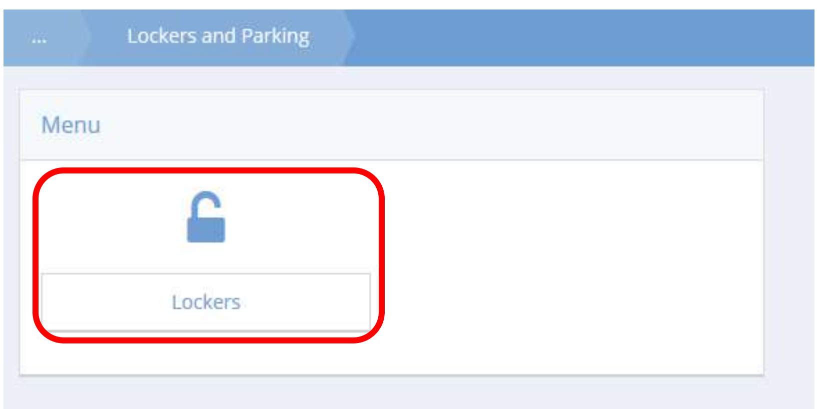


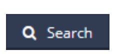
The next menu item in the Resources menu group is the "My Referrals" summary form. This form displays all client referrals for clients referred to the user's organization. From this form, the user can review referrals and, if needed, approve, deny or place the referral on hold.

Lockers and Parking



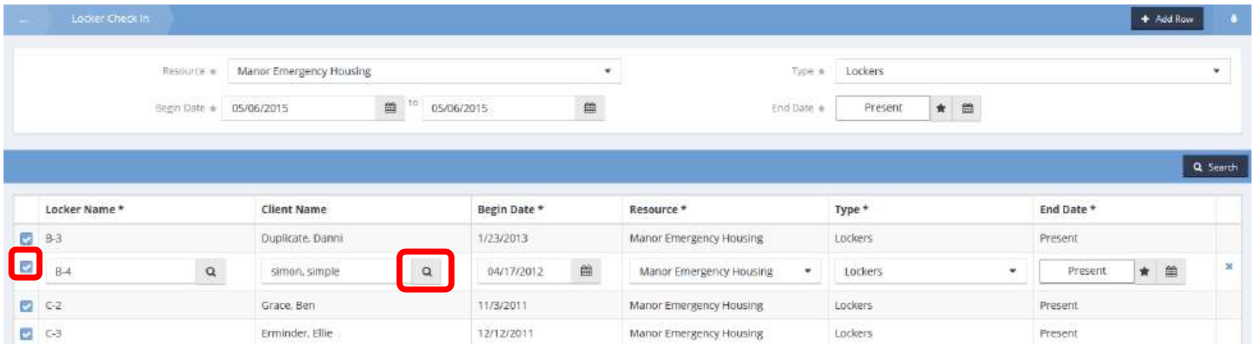
The Locker and Parking dashboard features only one item, Lockers. Clicking the Lockers icon displays the Locker Check In form.



Select a resource, type, date range, and click the 

button. Lockers fitting the specified parameters display in the spreadsheet below.

To edit a locker, click the checkbox icon and to assign a client to that locker, click the magnifying glass icon for Client Name. The Find Client no Locker Lookup form displays.

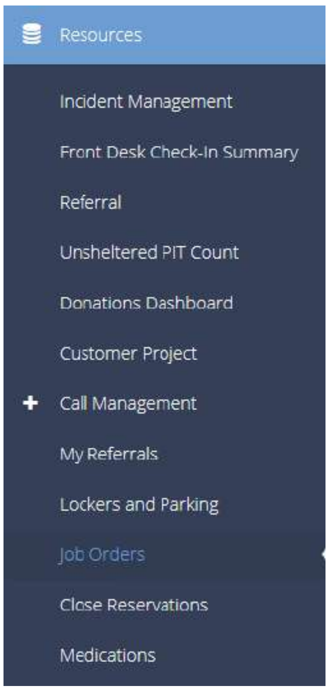


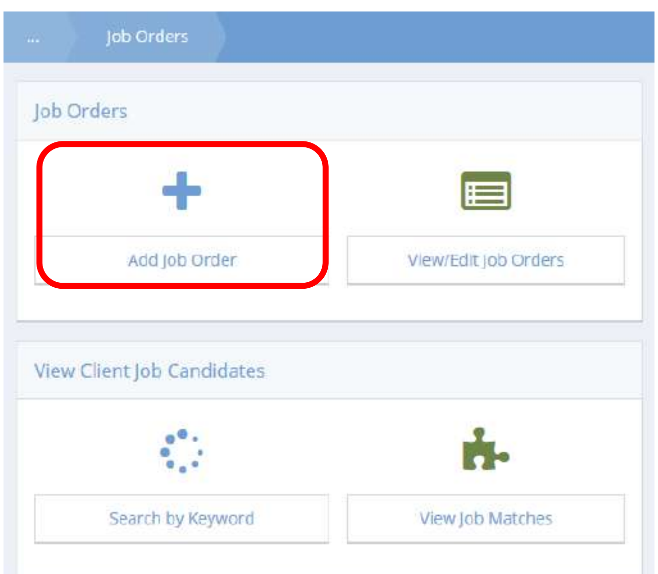
Use the search parameters to locate the desired client and select the client from the list. Click the Save button on the Locker Check In form when finished.

Job Orders

Job Opening Management – Employer Side

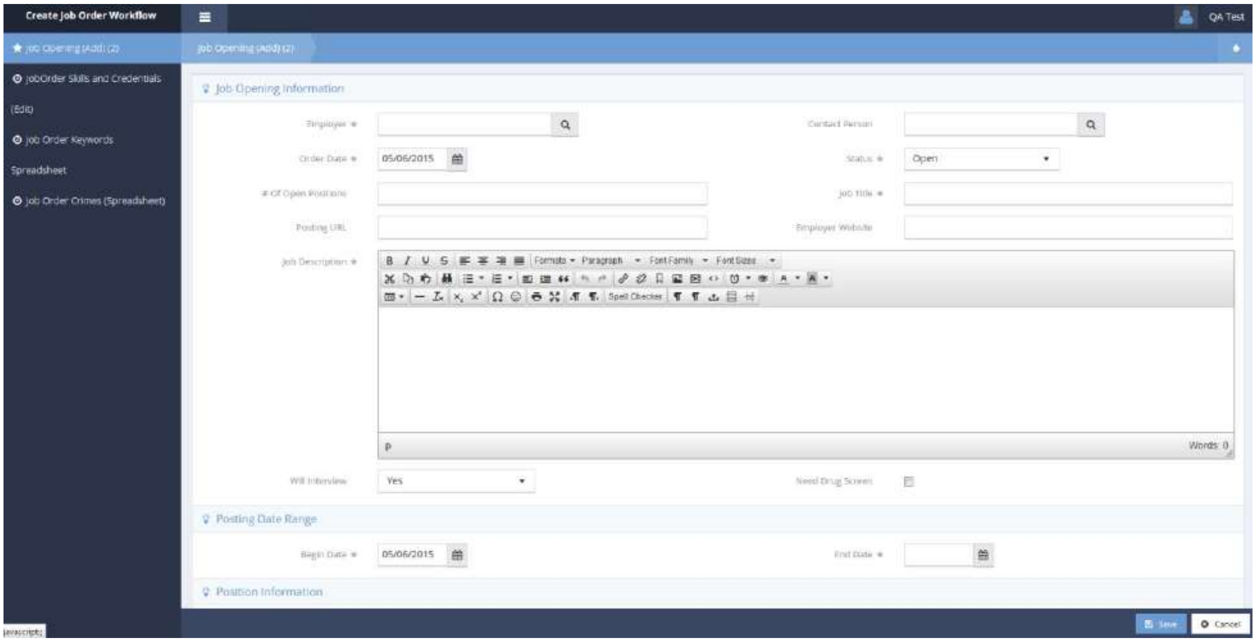
Objective: Enter and manage job opportunities including job description, qualifications, keywords and criminal record limitations.

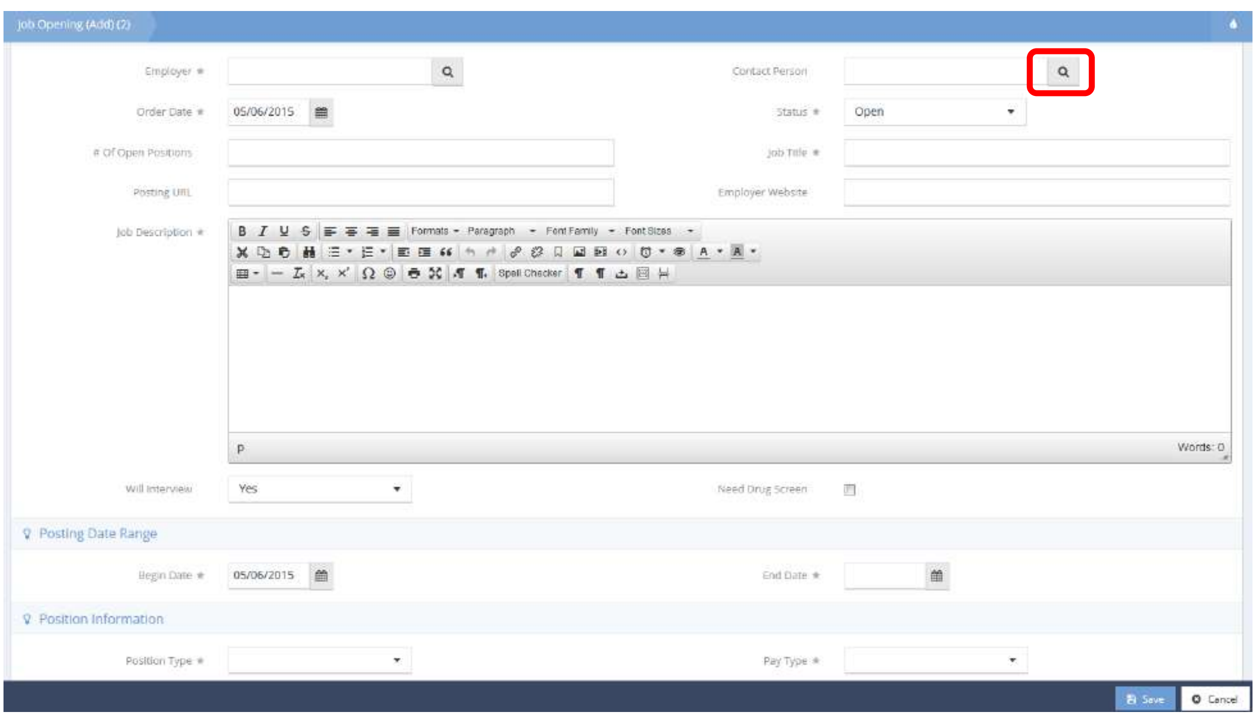




Click on the “Add Job Order” icon on the Job Orders menu. The workflow begins with the Job Opening form.

Job Opening (Add) (2)





Minimally, enter the required fields of Employer, Status, Job Title, Job Description, Begin Date, End Date, Position Type and Pay Type. Add any other information desired. Click on the Save button.

Note: ***Clicking on the magnifying glass icon for Contact Person opens a new form, Job Order Contact (Select).***

Job Order Contact (select)

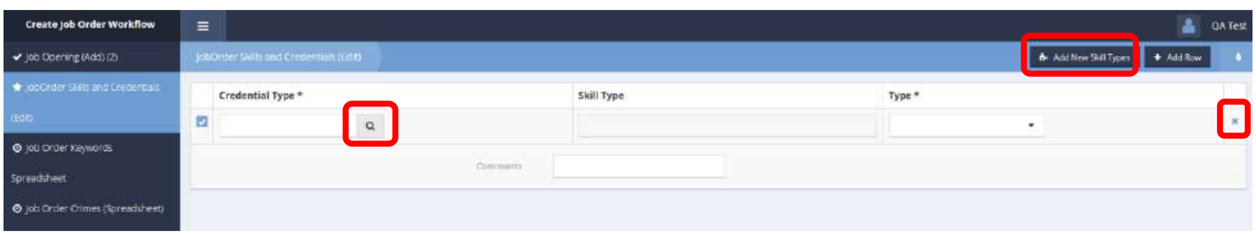
If the desired contact person does not appear on the list presented, click on the Add New *button. The form changes to facilitate adding a new contact.*

Job Order Contacts - Entity (Add New)

Enter the first name, last name and any other information desired. Click on the Save *button.*

The Job Order Skills and Credentials (Add New) form displays.

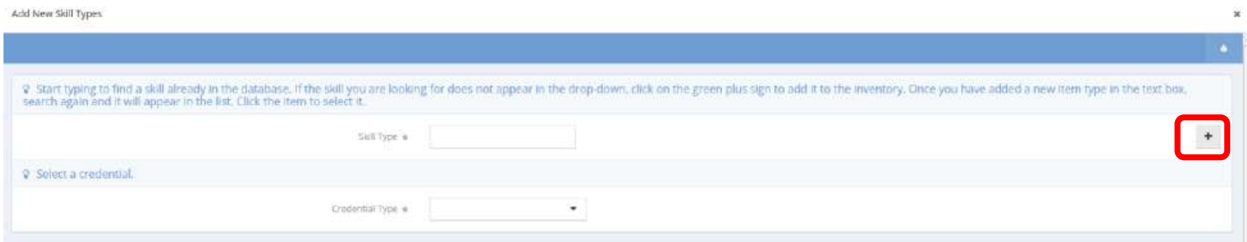
JobOrder Skills and Credentials (Add New)



Click on the magnifying glass icon and establish that all desired skills and credentials appear on the list that appears. If the desired skill or credential is not included in the list, click on the ✖ icon to return to the previous screen. Click on the Add New Skill Types button.

NOTE: ***Check the skill and credential list for matches to the desired skills and credentials. Any desired skill or credential not on the existing list must be added prior to selecting skills and credentials for the job opening. If not, skills and credentials selected to appear on the job opening prior to adding skills and credentials to the list are not saved on the job opening.***

The Add New Skill Types form displays.



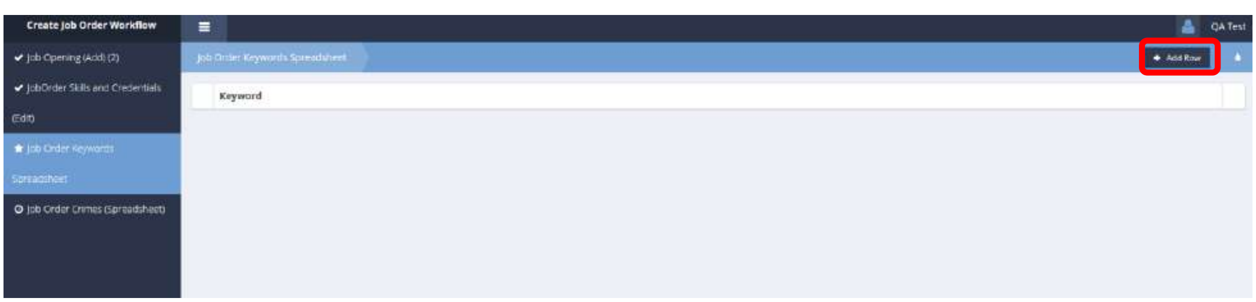
Start typing to find a skill already in the database. If the desired skill does not appear in the drop-down, click on the plus sign + to add it to the inventory.

Enter the desired skill or credential and click on the Save button.

Once all desired skills and credentials are in the system, click on the magnifying glass icon for credential type and select from the list that appears. Repeat the process until all desired skills and credentials appear on the Job Order Skills and Credentials (Add New) form. Click on the Save button.

Job Order Keywords Spreadsheet

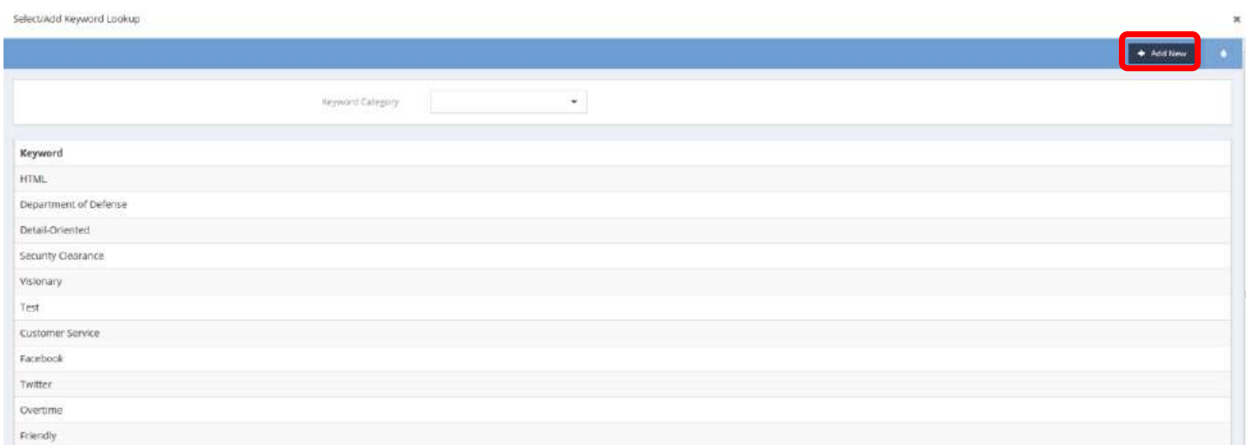
The next step in the workflow displays the Job Order Keywords Spreadsheet form.



Click on the + Add Row button. A new row appears.

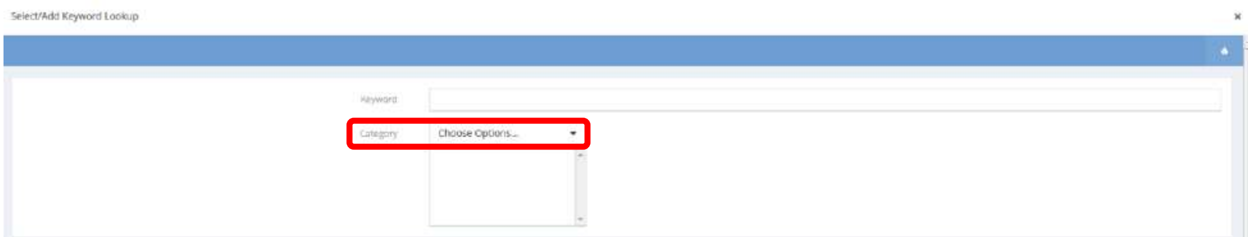
Click on the magnifying glass icon. The Select/Add Keyword Lookup form displays.

Select/Add Keyword Lookup



If the desired keyword is present on the list displayed, click on it. If not, click on the + Add New button.

Add Keyword



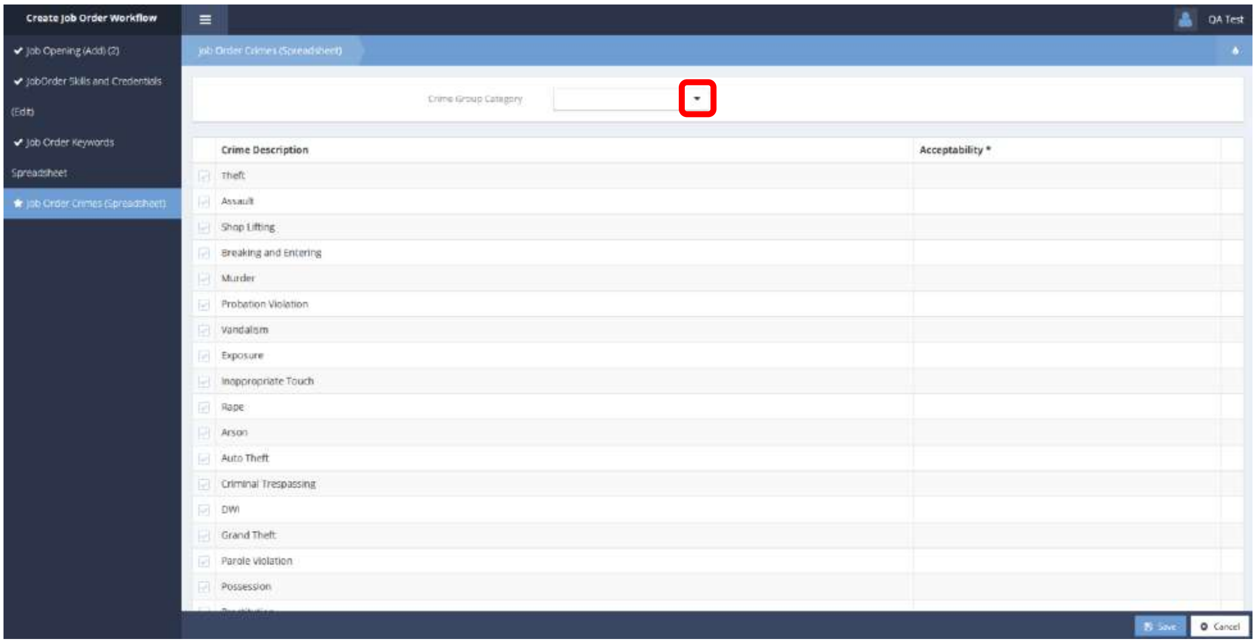
Enter the desired keyword and click on the down arrow icon for Category. Select the desired value from the drop-down list that appears. Click on the Save button. The keyword spreadsheet returns into view with the selected and added keywords.

Click on the Save button.

Job Order Crimes

The next step in the workflow displays the Job Order Crimes (Spreadsheet).

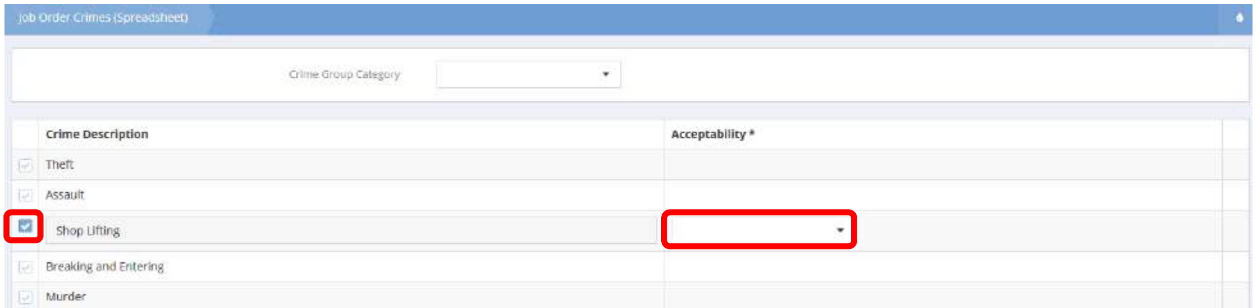
Job Order Crimes (Spreadsheet)



To filter the list displayed, click on the down arrow icon for Crime Group Category. Select from the drop-down list that displays.

Select a crime to add to the job opening by clicking on the clear checkbox associated with it.

The row highlights, the clear dot changes to blue checkbox and the Acceptability field appears.

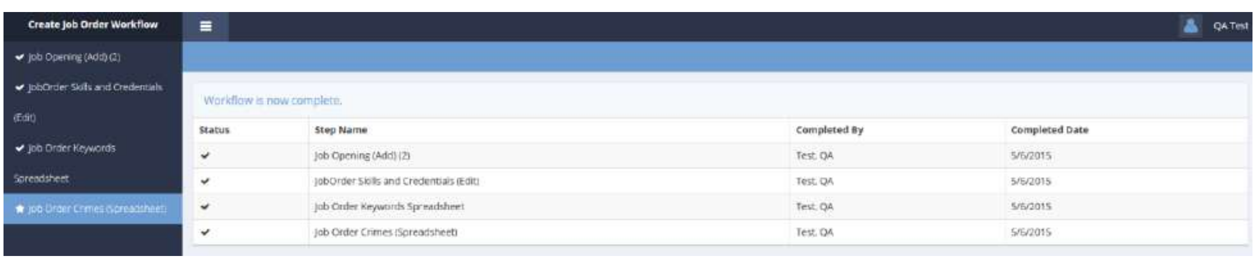


Click on the down arrow icon and select the desired value for acceptability (Not Acceptable, Not Preferred) from the drop-down list that appears.

NOTE: ***If not indicating "Not Acceptable" or "Not Preferred" for any crimes, click on the*** Cancel ***button, not the*** Save ***button.***

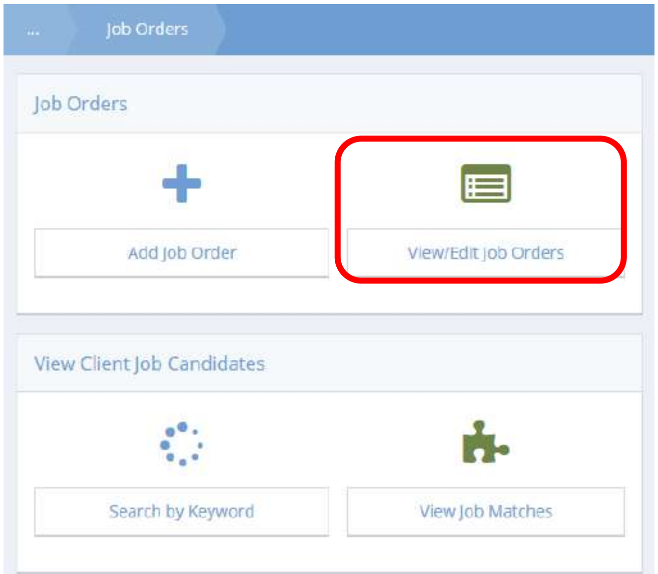
After all desired crimes are added, click on the Save button.

The workflow status screen indicates that the workflow is complete.

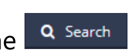


Click on the Done button.

View / Edit Job Orders

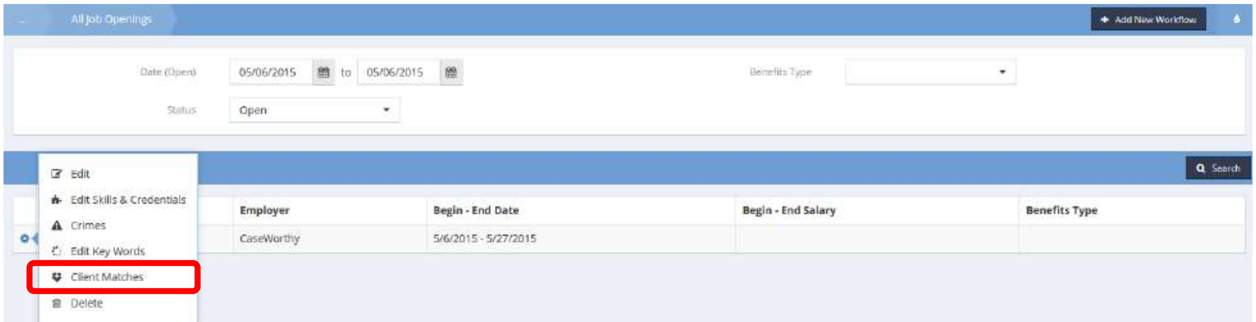


Click on the "View/Edit Job Orders" icon on the Job Orders menu. The All Job Openings form displays.

If desired, filter the resultant list by entering a date range, status and benefits type. Click on the 

button. The list, filtered to specifications, appears.

Click on the action gear icon associated with the desired job opening. Select Client Matches from the pop up menu that appears.



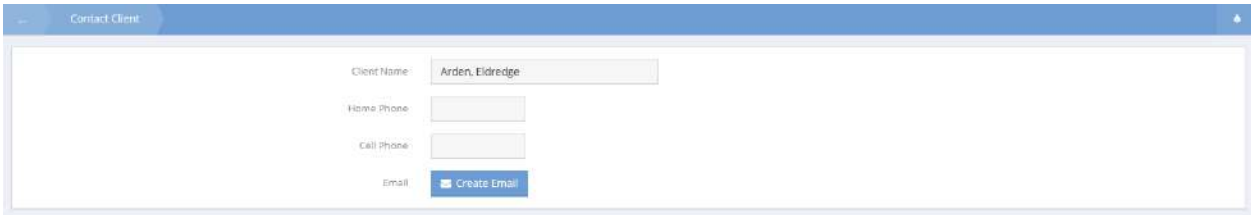
The Job Match – Client List form appears.

Job Match - Client List

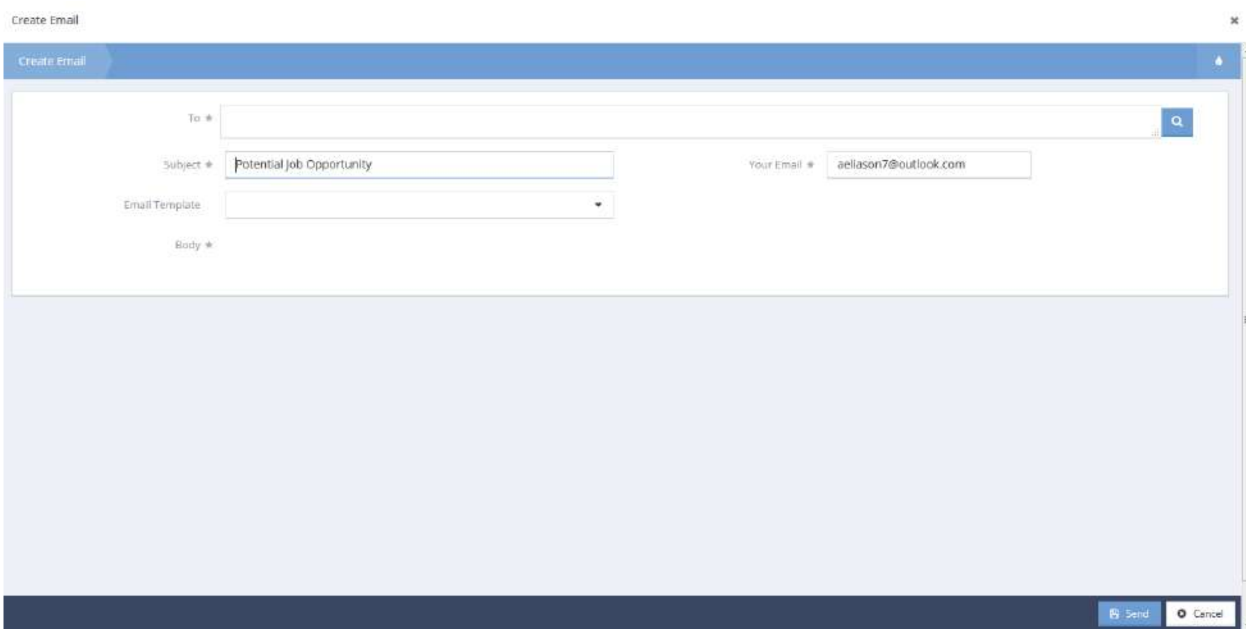
To contact the client with job information, click on the action gear icon associated with the desired job opening. Select Contact Client from the pop up menu that appears.

The Contact Client form displays. Utilize the contact information provided on the form to call or email the client. To email the client, click on the Create Email button.

Contact Client

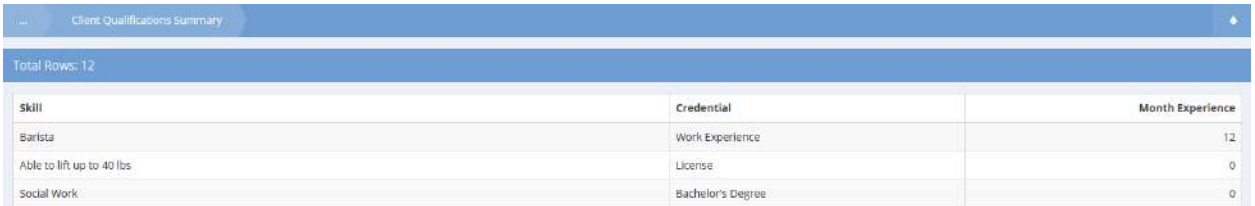


The Create Email form displays. Click on the down arrow icon for Email Template. Select an email template from the drop-down list that appears. Enter a message into the Body of the email and click the Send button.



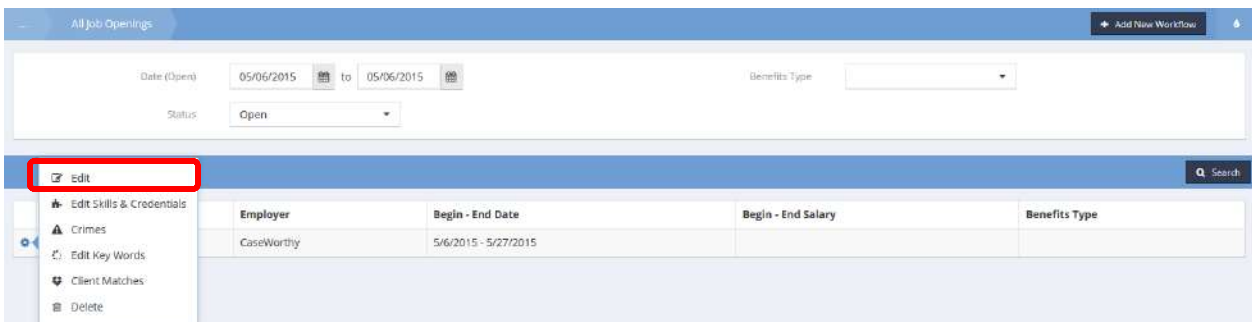
To view the job opening qualifications, from the Job Match – Client List form, click on the qualifications icon. The Client Qualifications Summary form displays.

Client Qualifications Summary

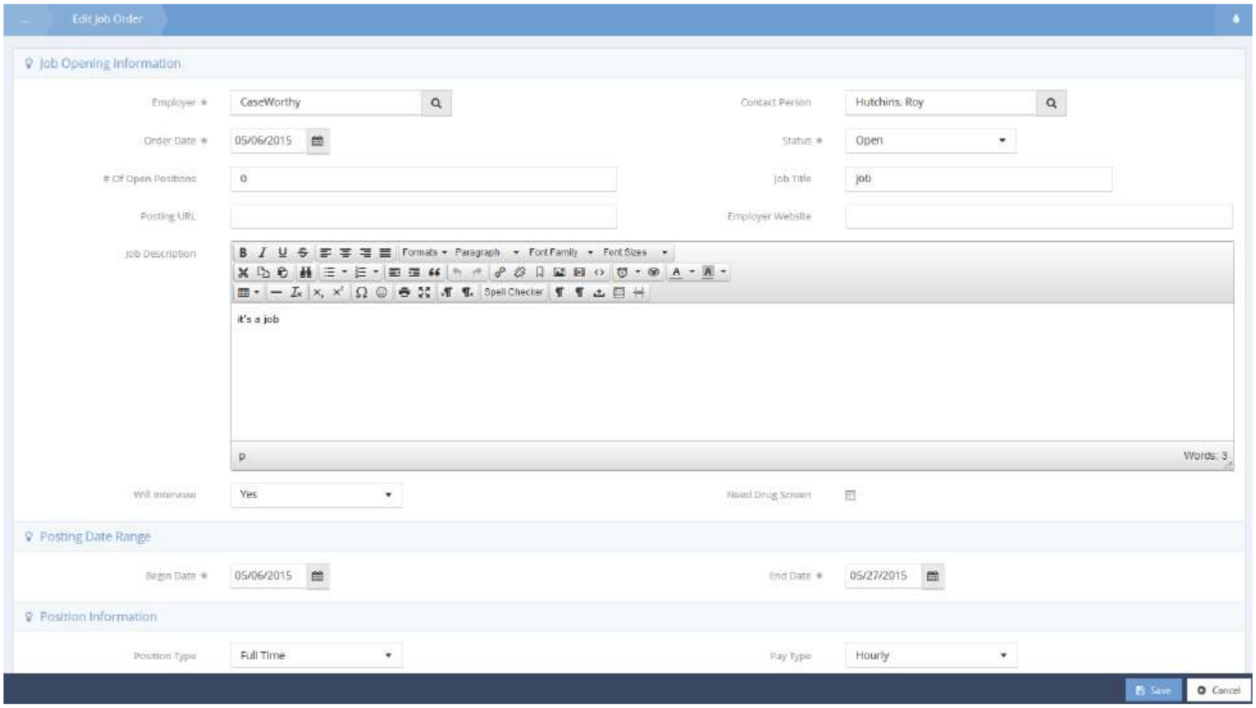


When finished viewing the qualifications, click on the Done button.

To edit a job opening, click on the action gear icon associated with the desired job opening on the All Job Openings form. Select Edit from the pop up menu that appears.

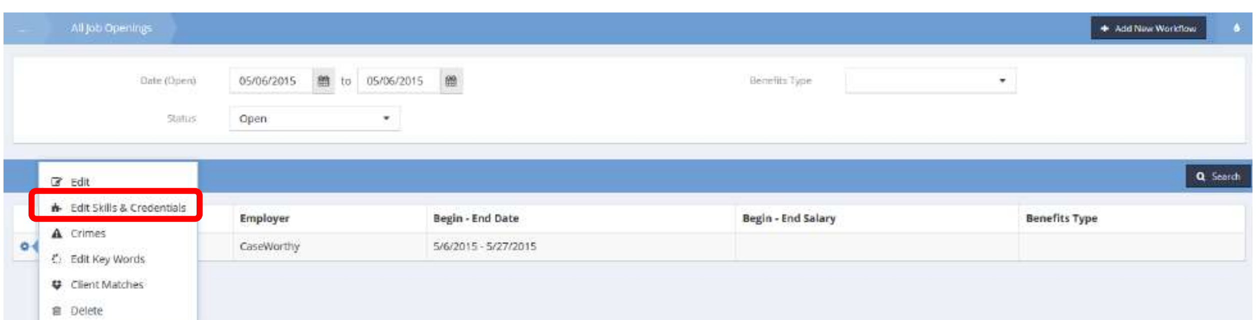


The Job Opening (Edit) form displays.

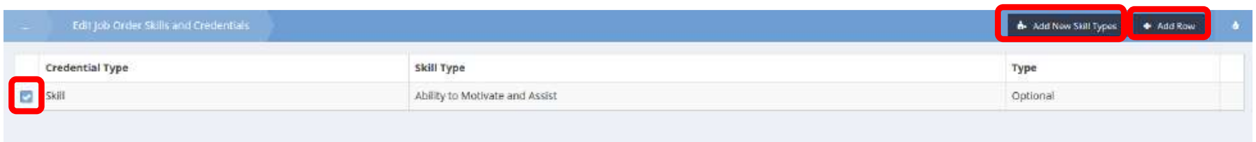


Make any desired changes and click on the Save button.

To edit the skills and credentials for a job opening, click on the action gear icon associated with the desired job opening on the All Job Openings form. Select Edit Skills and Credentials from the pop up menu that appears.

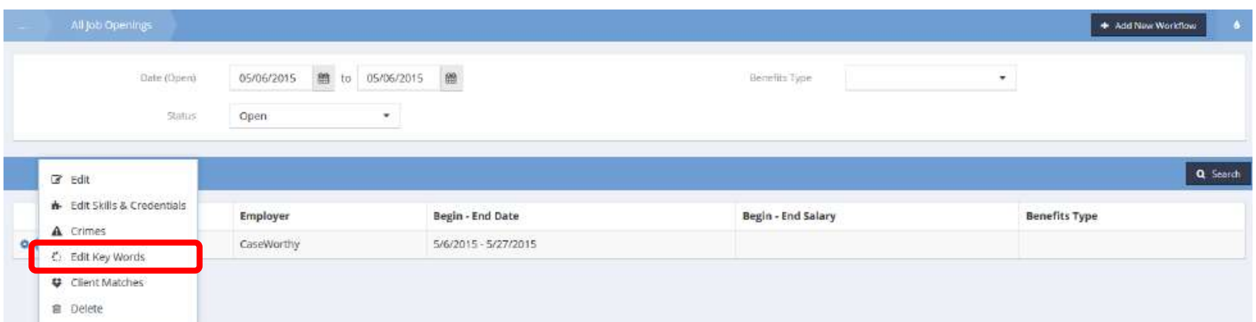


The Edit Job Order Skills and Credentials form displays.

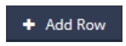


Add new skills or credentials, or edit existing ones by clicking on the Add New Skill Types button, the Add Row button or the blue checkbox icon for the associated skill in the list. Make any desired additions or changes and click on the Save button.

To edit the keywords for a job opening, click on the action gear icon associated with the desired job opening on the All Job Openings form. Select Edit Key Words from the pop up menu that appears.



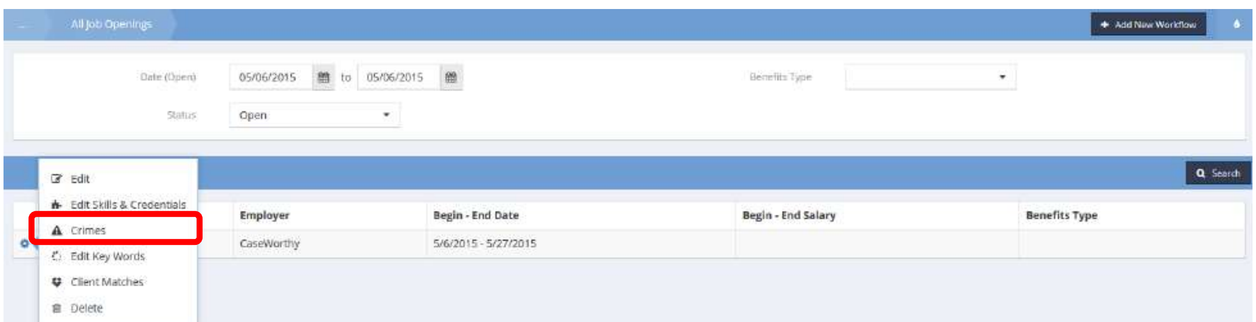
The Job Order Keywords Spreadsheet form displays a list of keywords for the job opening.

Add a new keyword by clicking on the 

button or edit an existing keyword by clicking on the clear checkbox icon associated with it. A new row appears, or the existing row expands. Make any desired additions or changes and click on the 

button.

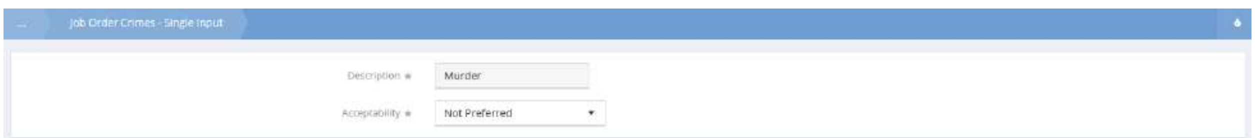
To edit crimes associated with a job opening, click on the action gear  icon associated with the desired job opening on the All Job Openings form. Select Crimes from the pop up menu that appears.

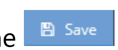


The Job Order Crimes (Summary) form displays.

Click on the action gear  icon for the desired crime and select Edit form the pop up menu that appears.

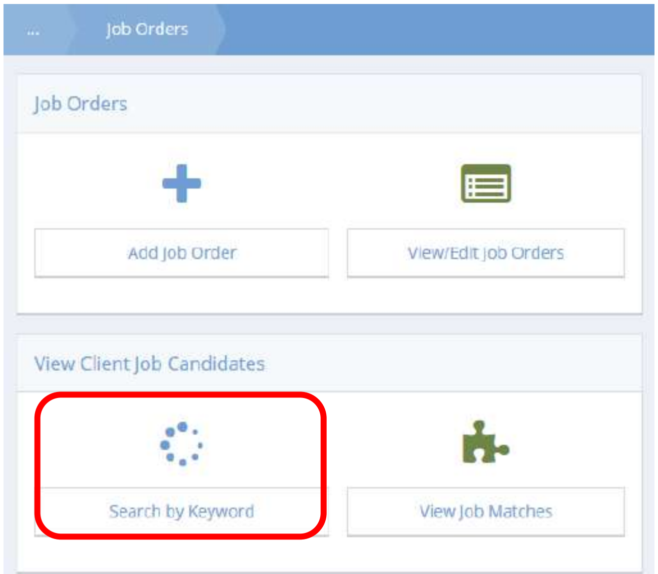
The Job Order Crimes – Single Input form displays.



Make any desired changes to the acceptability and click on the 

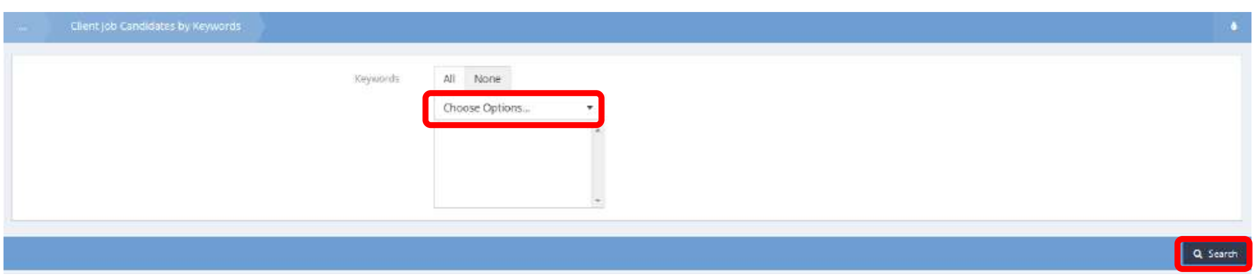
button.

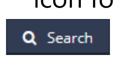
Search by Keyword



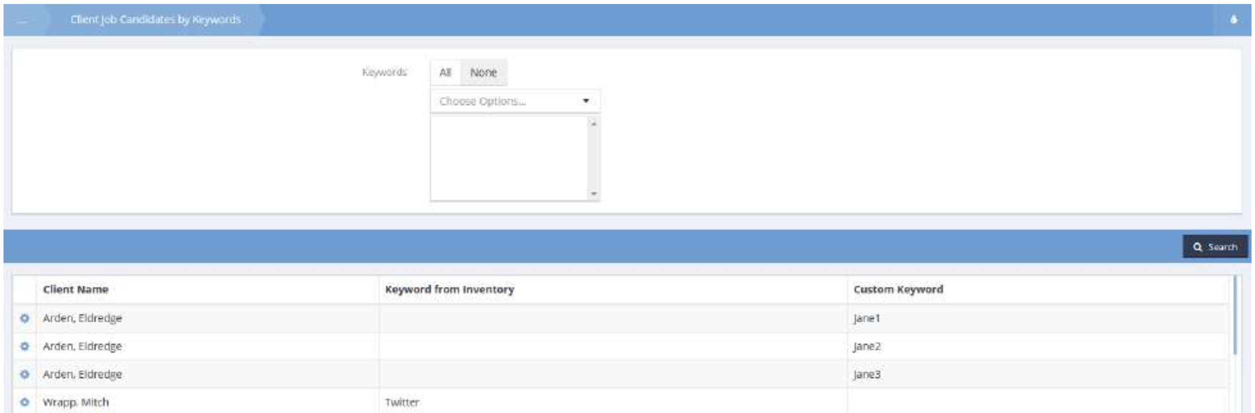
Click on the Search by Keyword icon on the View Client Job Candidates menu. The Client Job Candidates by Keywords form displays.

Client Job Candidates by Keywords

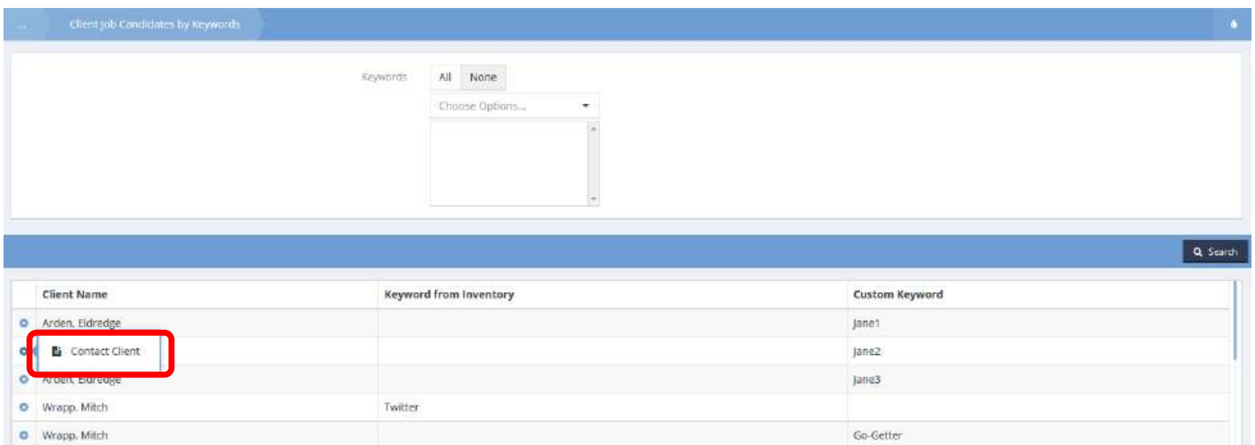


Click on the down arrow icon for Keywords and select all desired keywords from the drop-down list that appears. Click on the 

button. The list of matching clients displays.

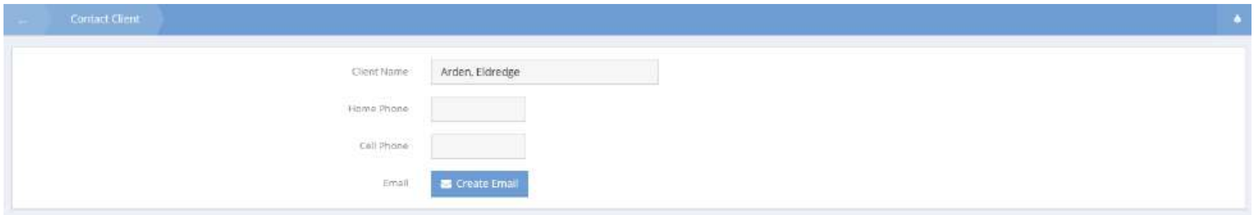


Click on the action gear icon associated with the desired client and select Contact Client from the pop up menu that appears.

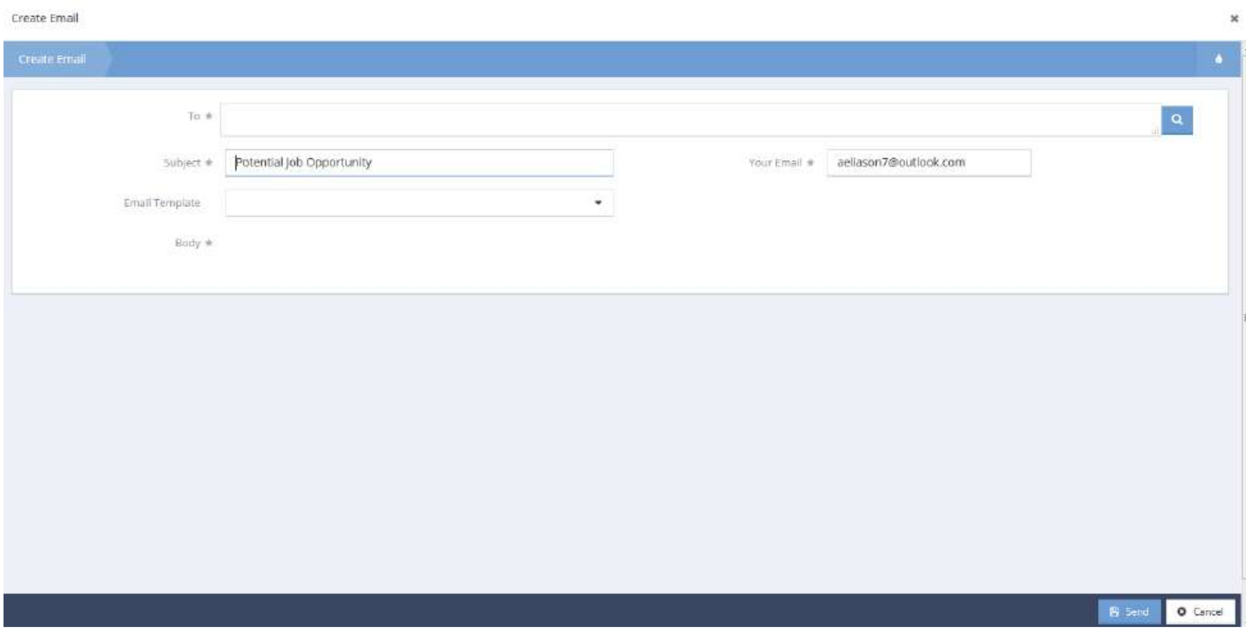


The Contact Client form displays. Utilize the contact information provided on the form to call or email the client. To email the client, click on the Create Email button.

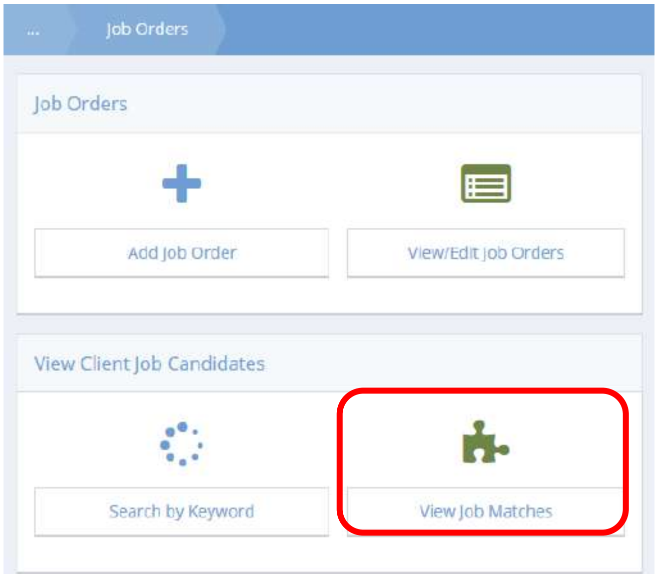
Contact Client



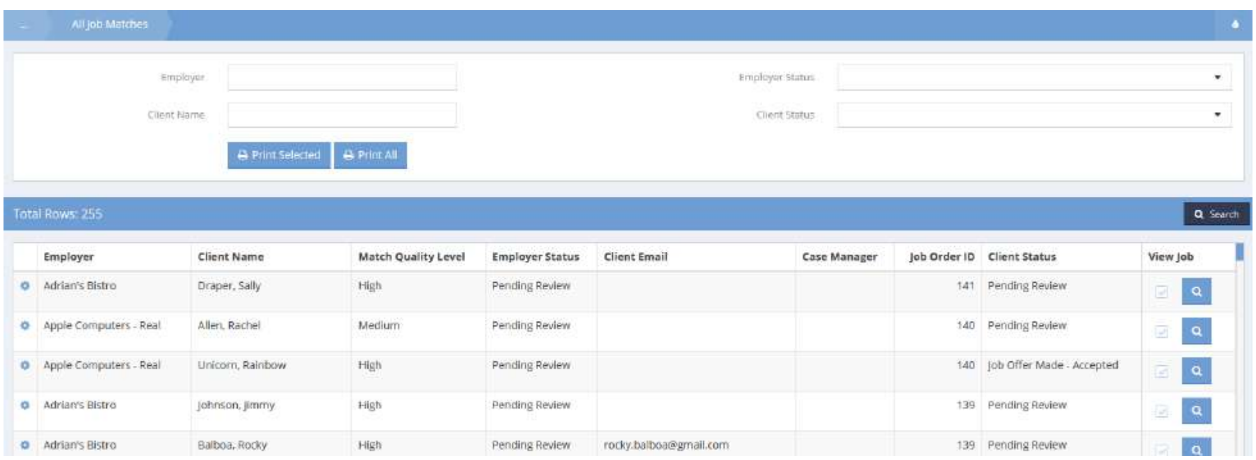
The Create Email form displays. Click on the down arrow icon for Email Template. Select an email template from the drop-down list that appears. Enter a message into the Body of the email and click the Send button.



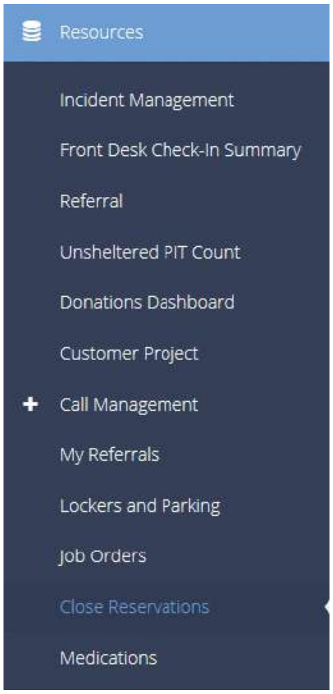
All Job Matches



Click on the “View Job Matches” icon on the View Client Job Candidates menu. The All Job Matches form displays a list of all job opening to client matches.

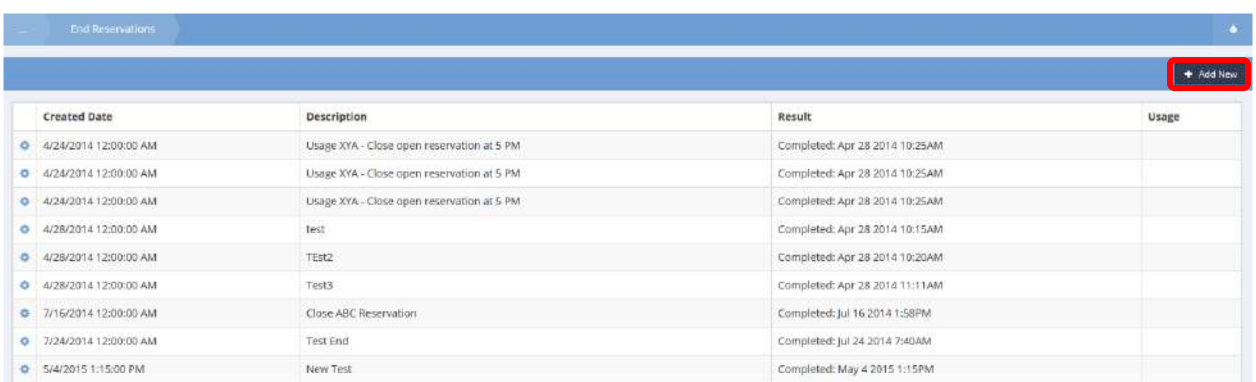


Close Reservations

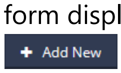


End Reservations

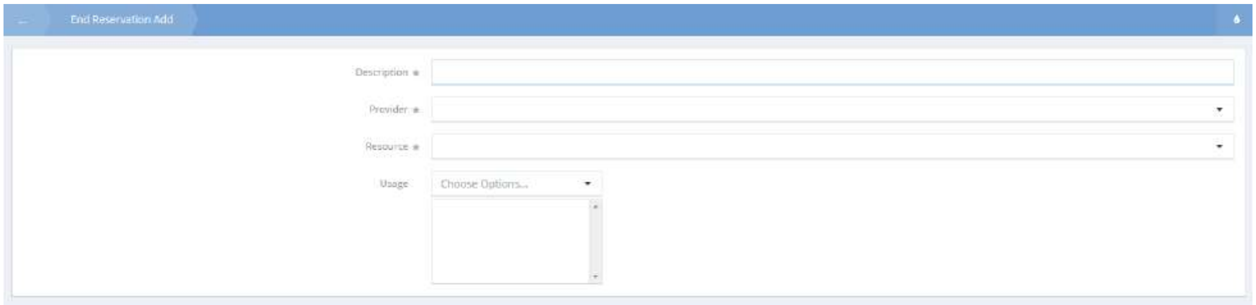
Objective: Reservations made but not used can have negative effects. Close unused reservations with this functionality.



Created Date	Description	Result	Usage
4/24/2014 12:00:00 AM	Usage XYA - Close open reservation at 5 PM	Completed: Apr 28 2014 10:25AM	
4/24/2014 12:00:00 AM	Usage XYA - Close open reservation at 5 PM	Completed: Apr 28 2014 10:25AM	
4/24/2014 12:00:00 AM	Usage XYA - Close open reservation at 5 PM	Completed: Apr 28 2014 10:25AM	
4/28/2014 12:00:00 AM	test	Completed: Apr 28 2014 10:15AM	
4/28/2014 12:00:00 AM	TEst2	Completed: Apr 28 2014 10:20AM	
4/28/2014 12:00:00 AM	Test3	Completed: Apr 28 2014 11:11AM	
7/16/2014 12:00:00 AM	Close ABC Reservation	Completed: Jul 16 2014 1:58PM	
7/24/2014 12:00:00 AM	Test End	Completed: Jul 24 2014 7:40AM	
5/4/2015 1:15:00 PM	New Test	Completed: May 4 2015 1:15PM	

The End Reservations form displays a list of manually closed unused reservations. To close unused reservations, click the  button. The End Reservation Add form displays.

End Reservation Add

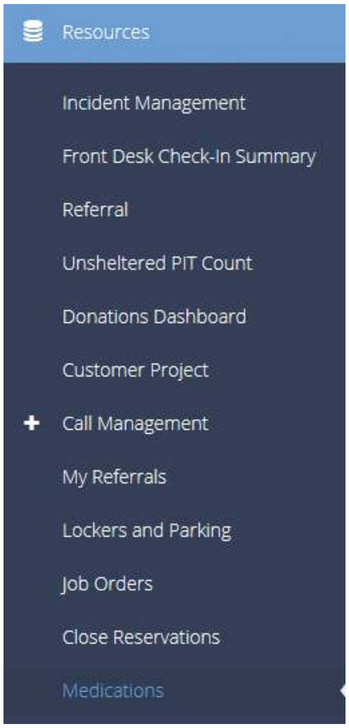


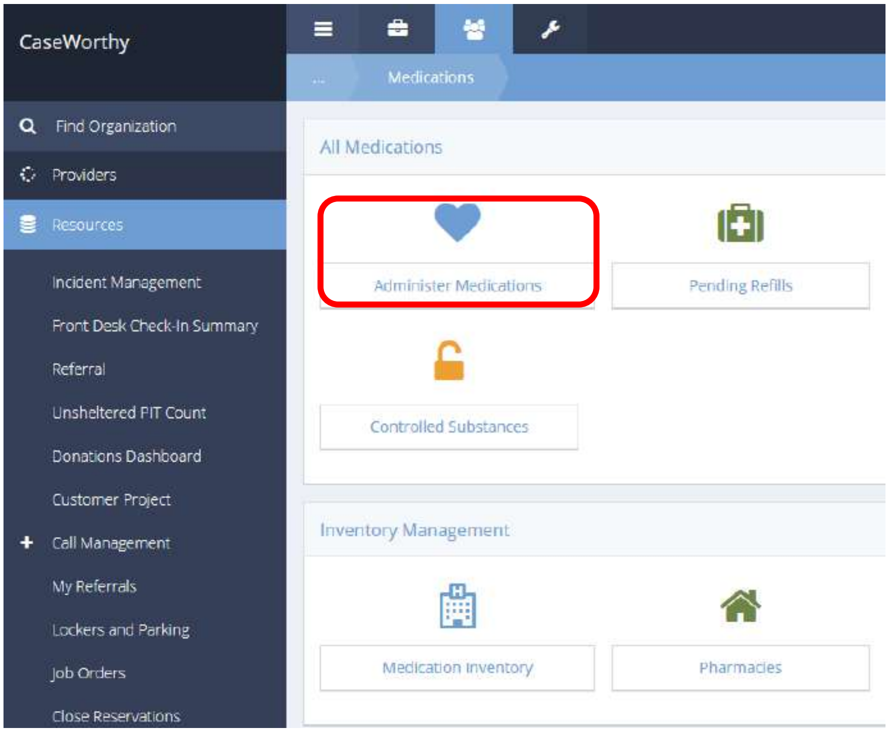
Enter a description for this instance of reservation closings. Click on the down arrow icon for Provider and select the desired provider from the drop-down list that appears. Repeat the process for Resource and if desired, for Usage. Multiple usages may be selected if desired. Click on the Save button.

Medications

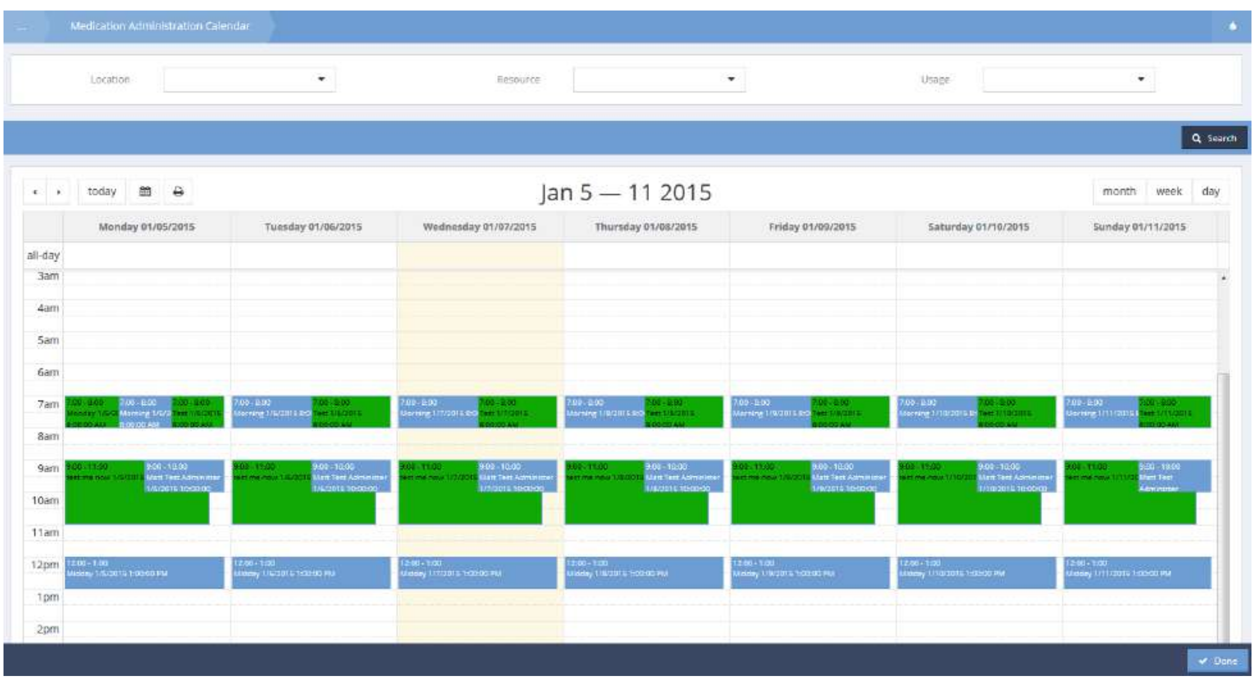
Administer Medications

Objective: Administer medications to a client.

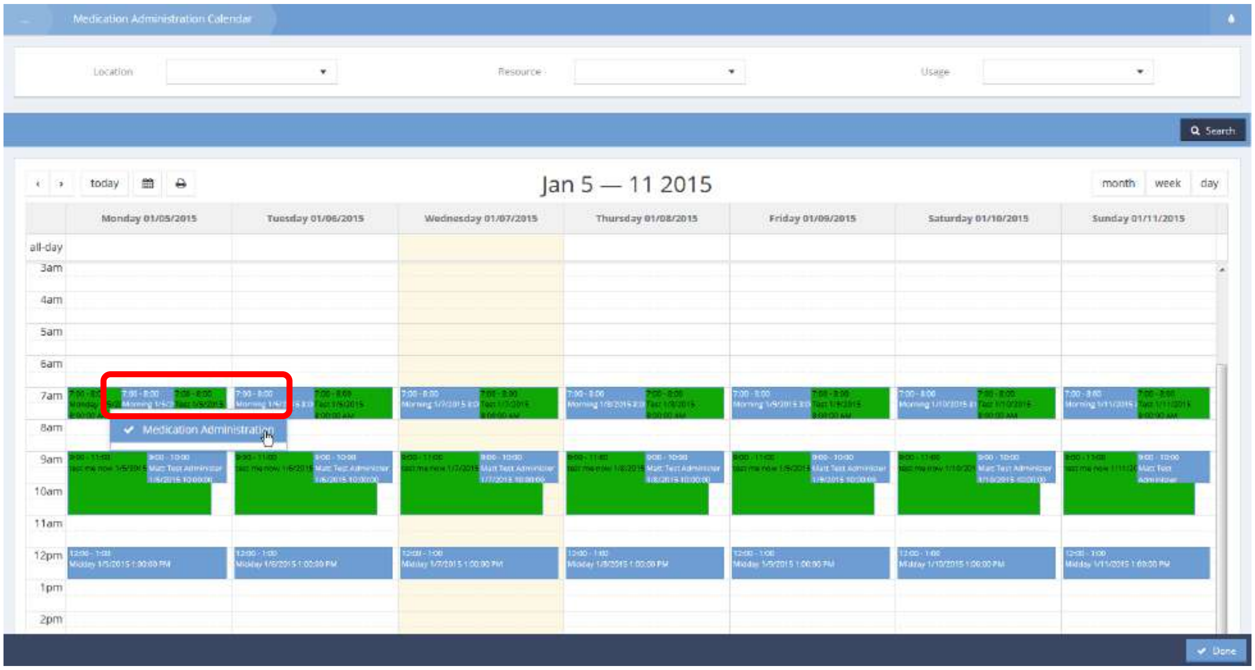




Click on the Administer Medications icon. The Medication Calendar displays.



Click on a calendar event and select Medication Administration from the pop up menu that appears.

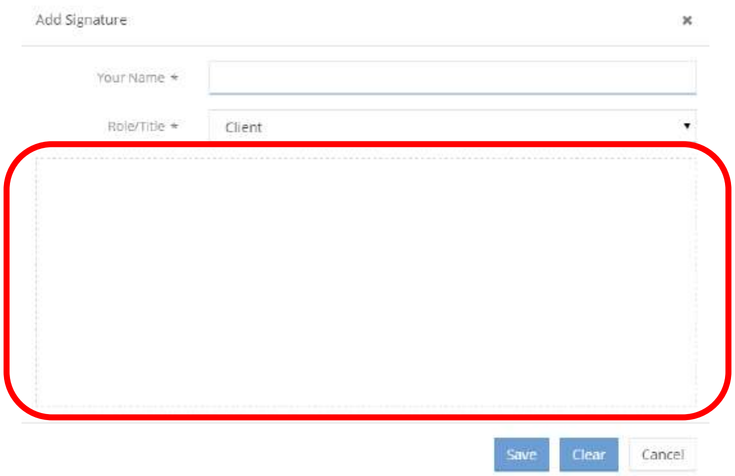


The Medication Administration Signature form displays.

The date and shift automatically fill in based on the event selected from the calendar. Make any alterations required. Click on the magnifying glass icon to select the client the medication is being administered to.

Add a witness if necessary. To view medications the client has taken today, click the Medications Taken Today button. The Medications Taken Today form displays.

Finally, click + Add Signature to open the Add Signature window.



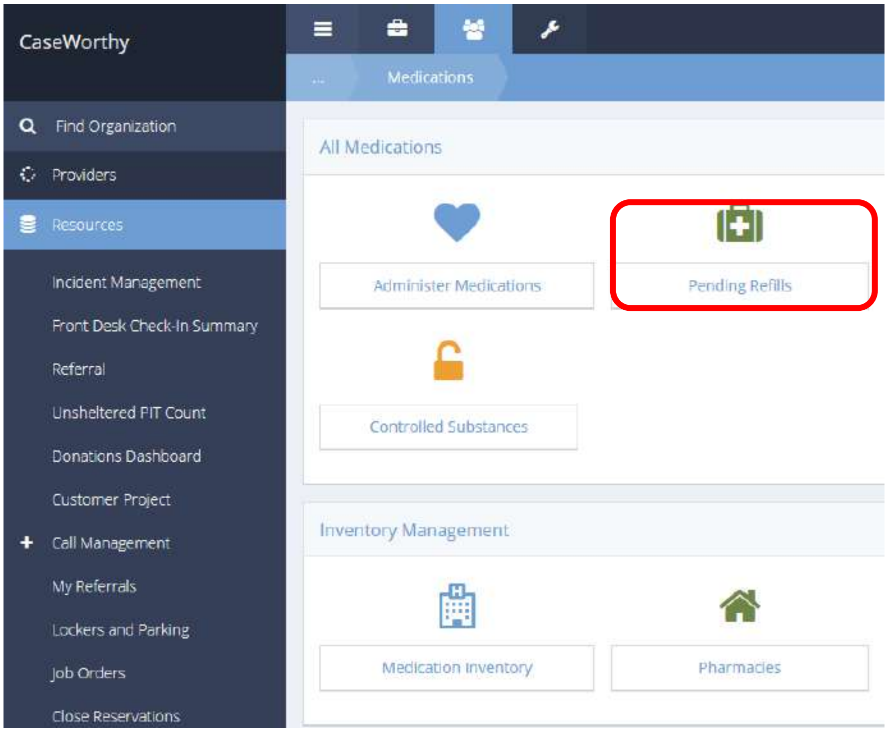
Enter a name, select a role or title from the dropdown box, and sign in the designated field.

Click on the Save button.

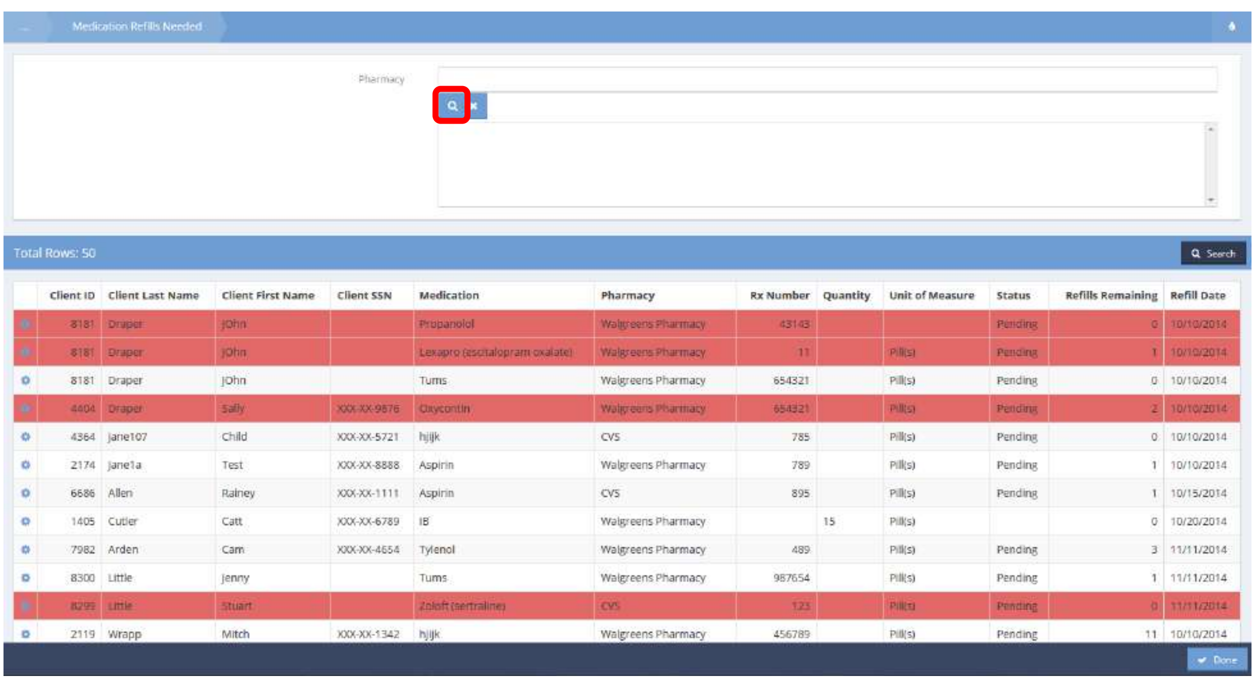
Click on the Done button.

Pending Refills

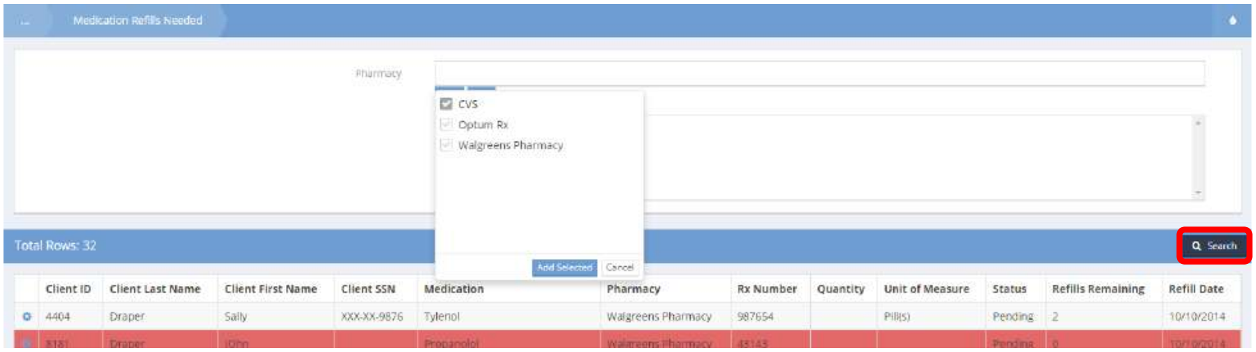
Objective: View or edit pending medication refills.



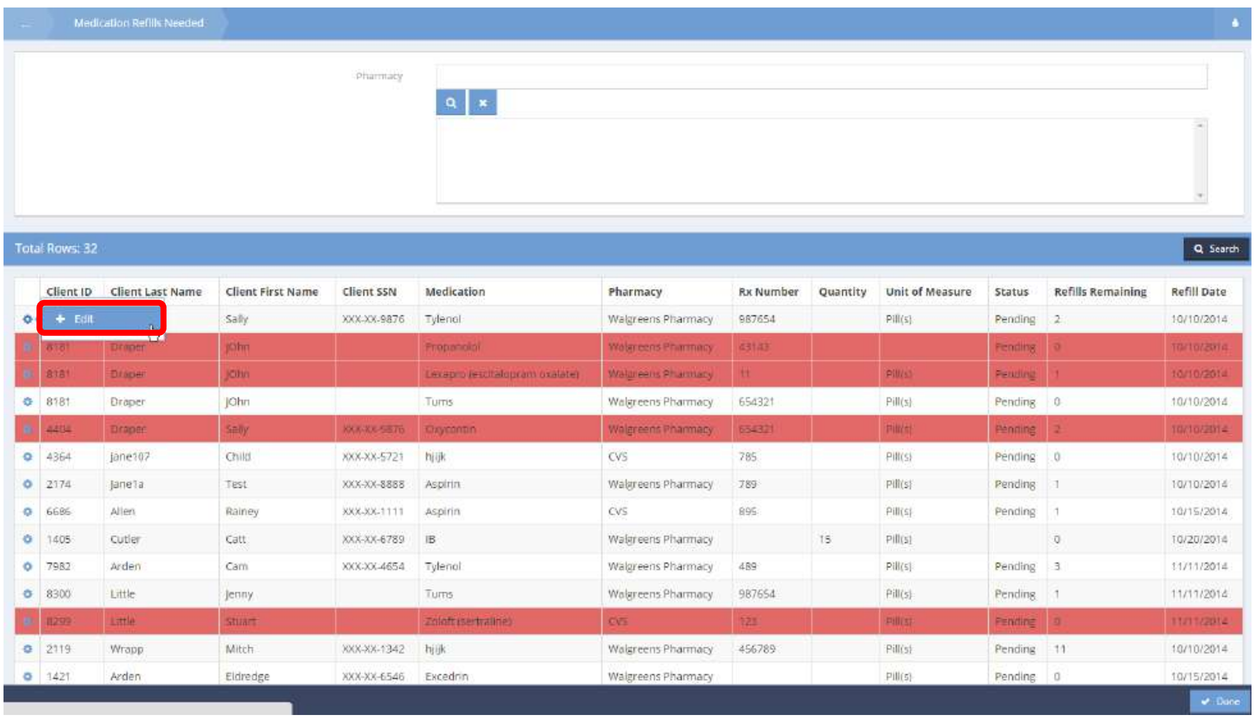
Click the Pending Refills icon. The Medication Refills Needed form displays.



Click the magnifying glass icon to select the desired pharmacies.

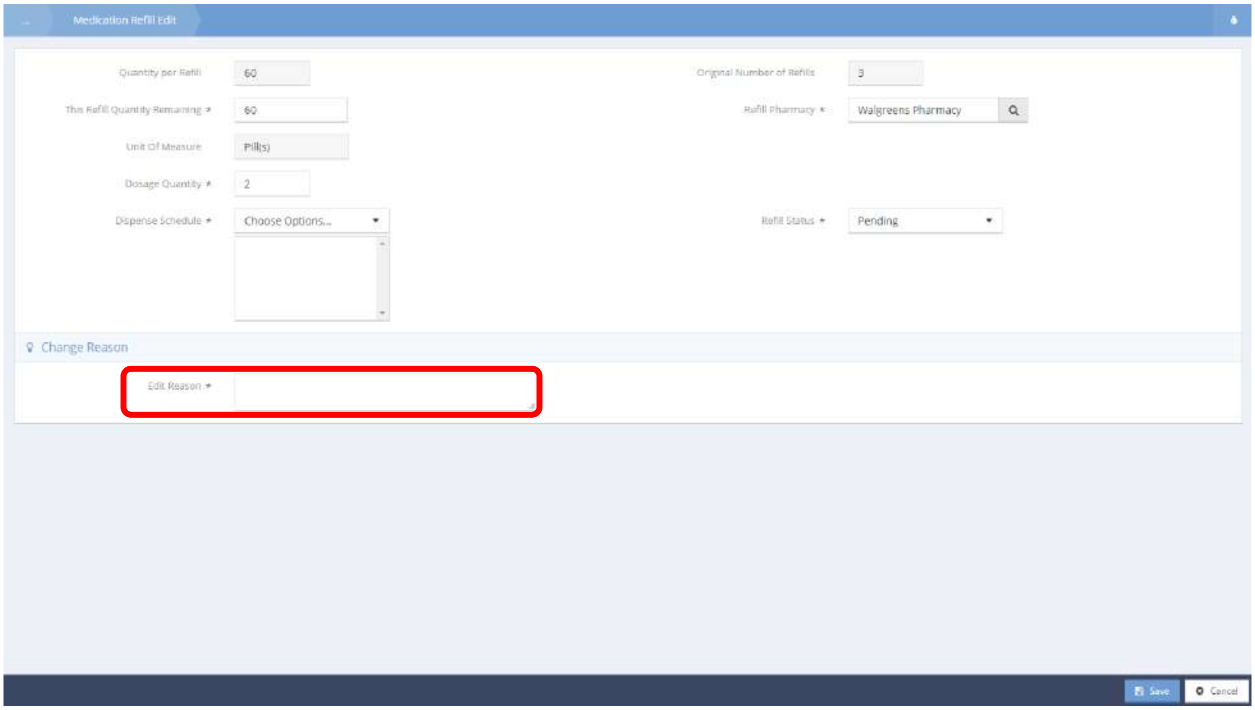


Click Search to filter results to the selected pharmacies.



Click the action gear and click Edit to edit any refills.

The Medication Refill not complete Edit form displays.



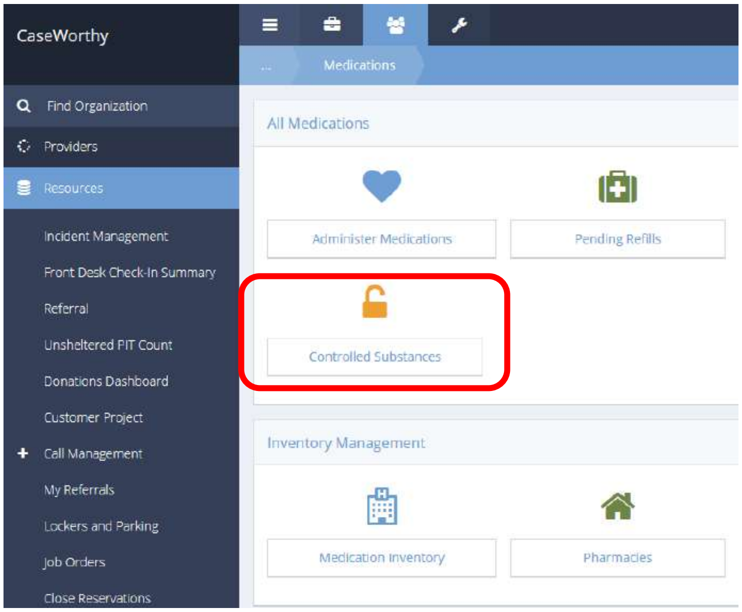
Change any necessary info and enter a reason for the edit. Click 

and then click 

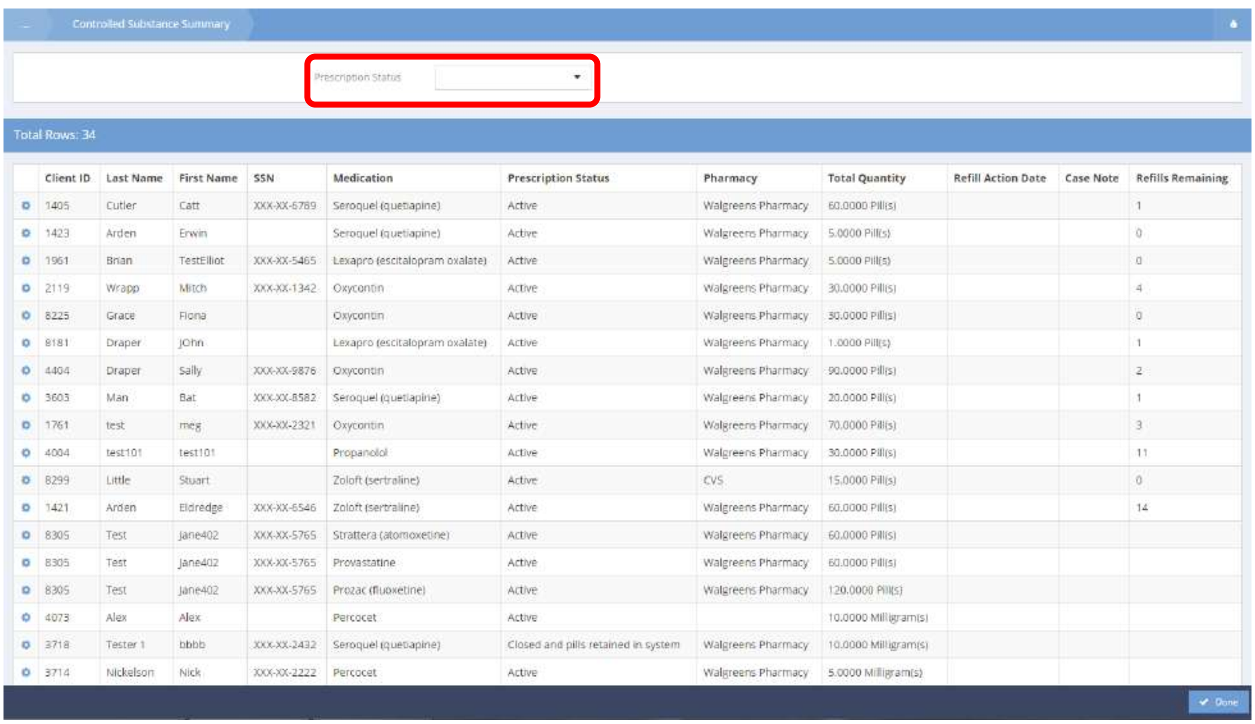
when finished editing.

Controlled Substances

Objective: Edit refill status or close prescriptions for controlled substances.

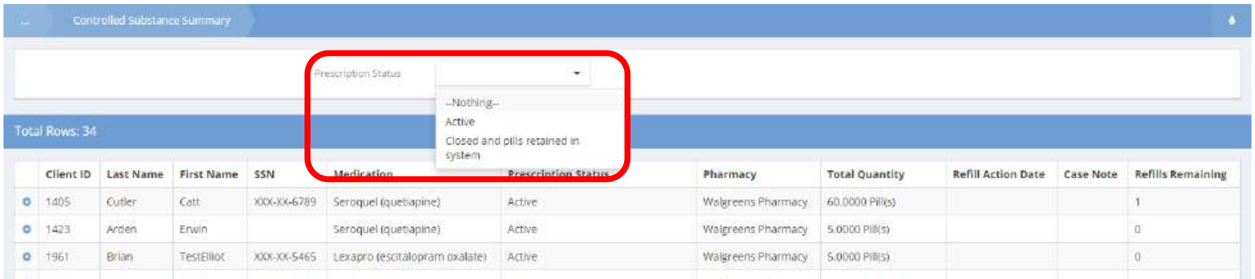


Click the Controlled Substances icon. The Controlled Substance Summary form displays.

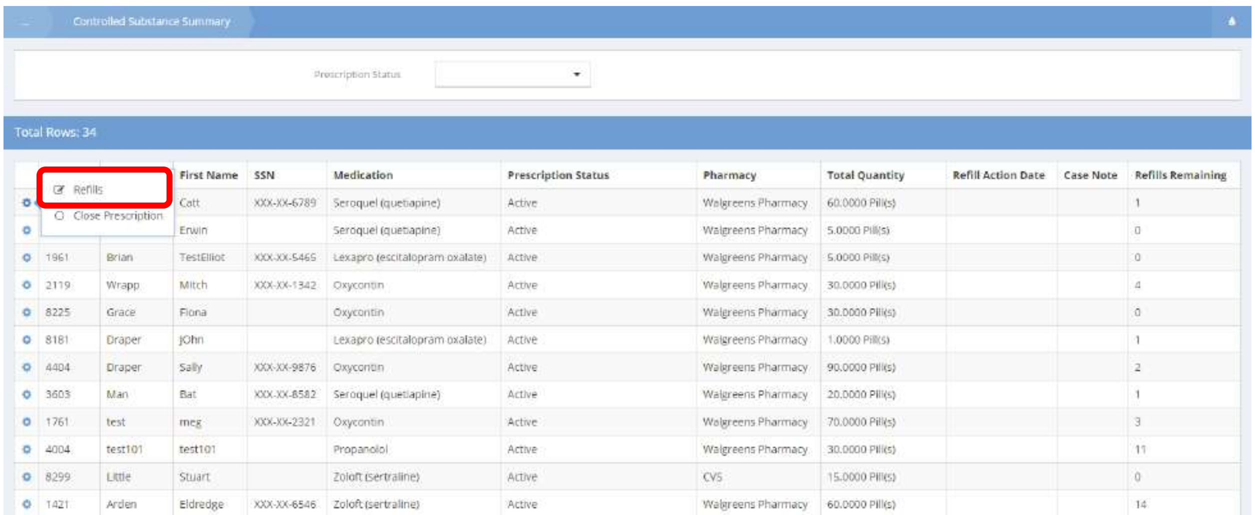


Client ID	Last Name	First Name	SSN	Medication	Prescription Status	Pharmacy	Total Quantity	Refill Action Date	Case Note	Refills Remaining
1405	Cutler	Catt	XXX-XX-6789	Seroquel (quetiapine)	Active	Walgreens Pharmacy	60.0000 Pill(s)			1
1423	Arden	Erwin		Seroquel (quetiapine)	Active	Walgreens Pharmacy	5.0000 Pill(s)			0
1961	Brian	TestElliot	XXX-XX-5465	Lexapro (escitalopram oxalate)	Active	Walgreens Pharmacy	5.0000 Pill(s)			0
2119	Wrapp	Mitch	XXX-XX-1342	Oxycontin	Active	Walgreens Pharmacy	30.0000 Pill(s)			4
8225	Grace	Fiona		Oxycontin	Active	Walgreens Pharmacy	30.0000 Pill(s)			0
8181	Draper	jOhn		Lexapro (escitalopram oxalate)	Active	Walgreens Pharmacy	1.0000 Pill(s)			1
4404	Draper	Sally	XXX-XX-9876	Oxycontin	Active	Walgreens Pharmacy	90.0000 Pill(s)			2
3603	Man	Bat	XXX-XX-8582	Seroquel (quetiapine)	Active	Walgreens Pharmacy	20.0000 Pill(s)			1
1761	test	meg	XXX-XX-2321	Oxycontin	Active	Walgreens Pharmacy	70.0000 Pill(s)			3
4004	test101	test101		Propanolol	Active	Walgreens Pharmacy	30.0000 Pill(s)			11
8299	Little	Stuart		Zoloft (sertraline)	Active	CVS	15.0000 Pill(s)			0
1421	Arden	Eldredge	XXX-XX-6546	Zoloft (sertraline)	Active	Walgreens Pharmacy	60.0000 Pill(s)			14
8305	Test	jane402	XXX-XX-5765	Strattera (atomoxetine)	Active	Walgreens Pharmacy	60.0000 Pill(s)			
8305	Test	jane402	XXX-XX-5765	Provastatine	Active	Walgreens Pharmacy	60.0000 Pill(s)			
8305	Test	jane402	XXX-XX-5765	Prozac (fluoxetine)	Active	Walgreens Pharmacy	120.0000 Pill(s)			
4073	Alex	Alex		Percocet	Active		10.0000 Milligram(s)			
3718	Tester 1	bbbb	XXX-XX-2432	Seroquel (quetiapine)	Closed and pills retained in system	Walgreens Pharmacy	10.0000 Milligram(s)			
3714	Nickelson	Nick	XXX-XX-2222	Percocet	Active	Walgreens Pharmacy	5.0000 Milligram(s)			

To filter between Active or Closed prescription, click the Prescription Status dropdown box.



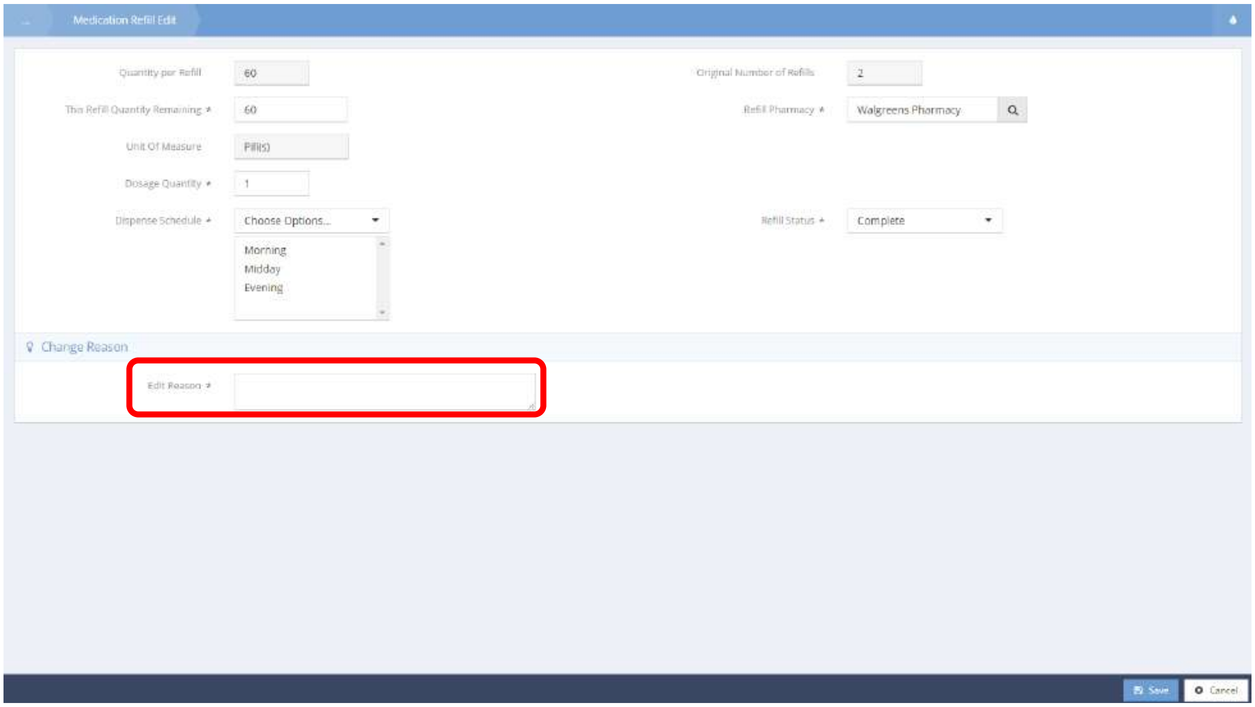
Select the desired status and the results filter.



To close a prescription, click Close Prescription. To manage refills, click the action gear and then click Refills. The Refill form displays.

Click the action gear and Edit to edit refills.

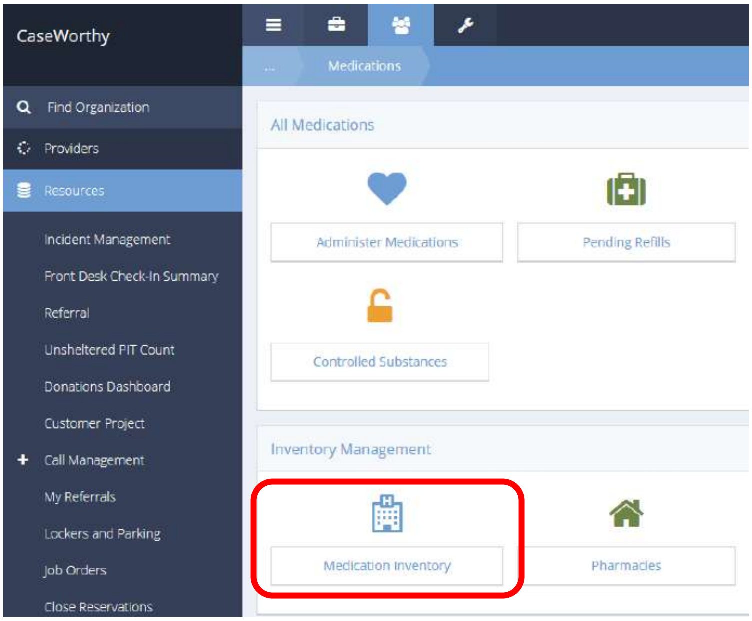
The Medication Refill not complete Edit form displays.



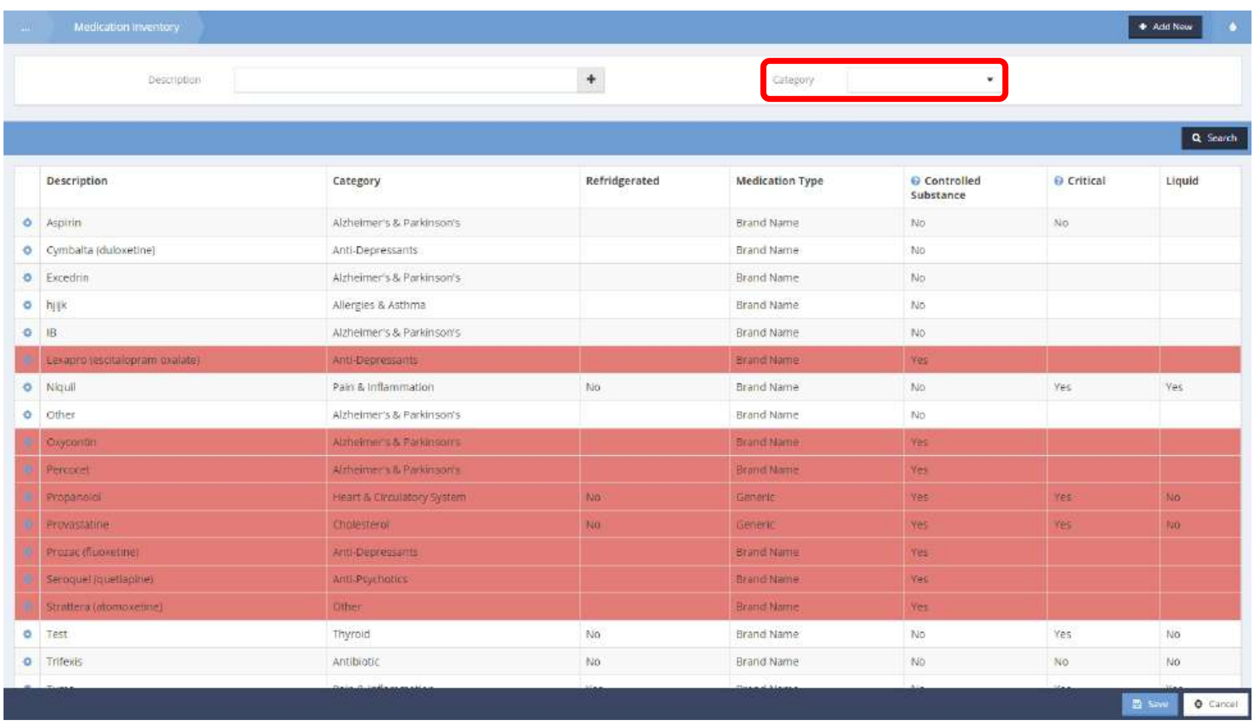
Make any necessary changes and enter a reason for the edit. Click Save when finished. Click Done when finished editing.

Medication Inventory

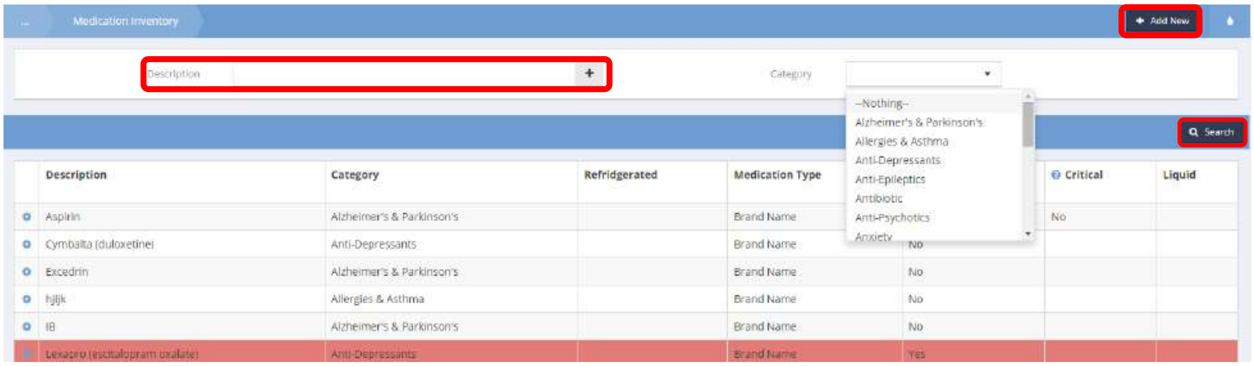
Objective: Manage medication inventory.



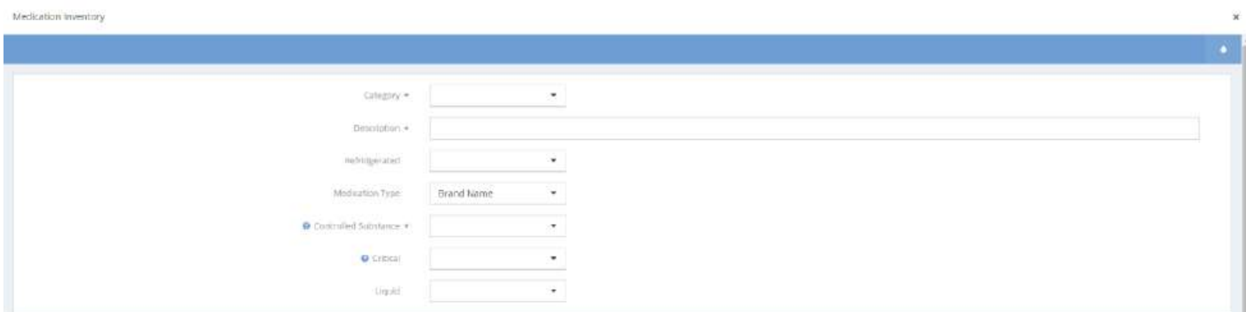
Click the Medication Inventory icon. The Medication Inventory form displays.



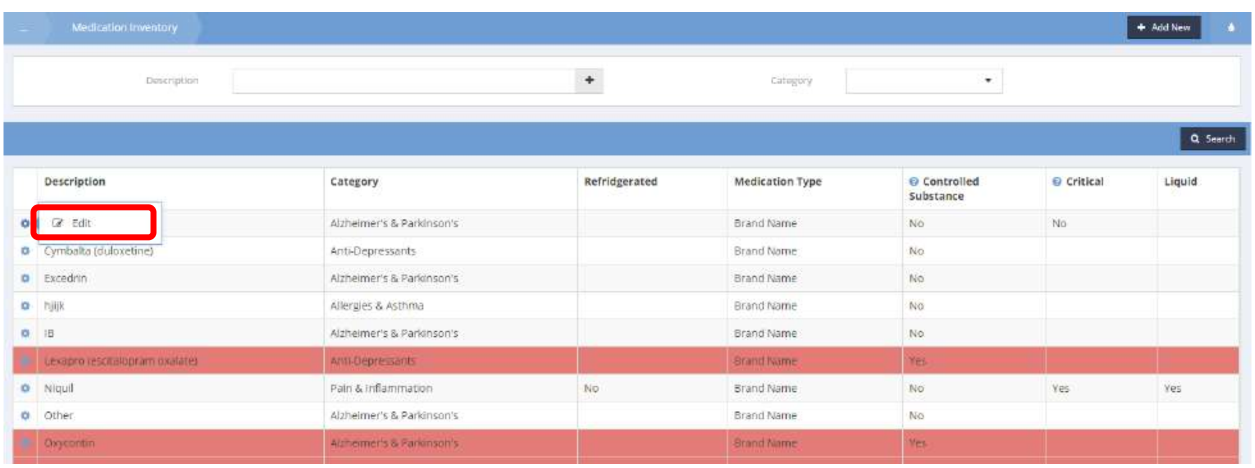
Click on the Category dropdown box to filter to a specific category.



Enter a description and click Search to display existing medications. Click Add New to add a new medication. The Edit Medication Inventory form displays.

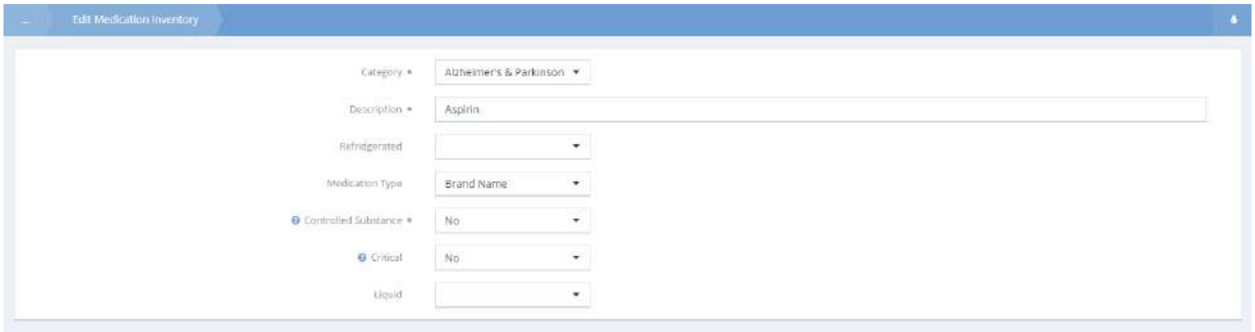


Fill out all the necessary fields and click Save when finished. The Medication Inventory form displays.

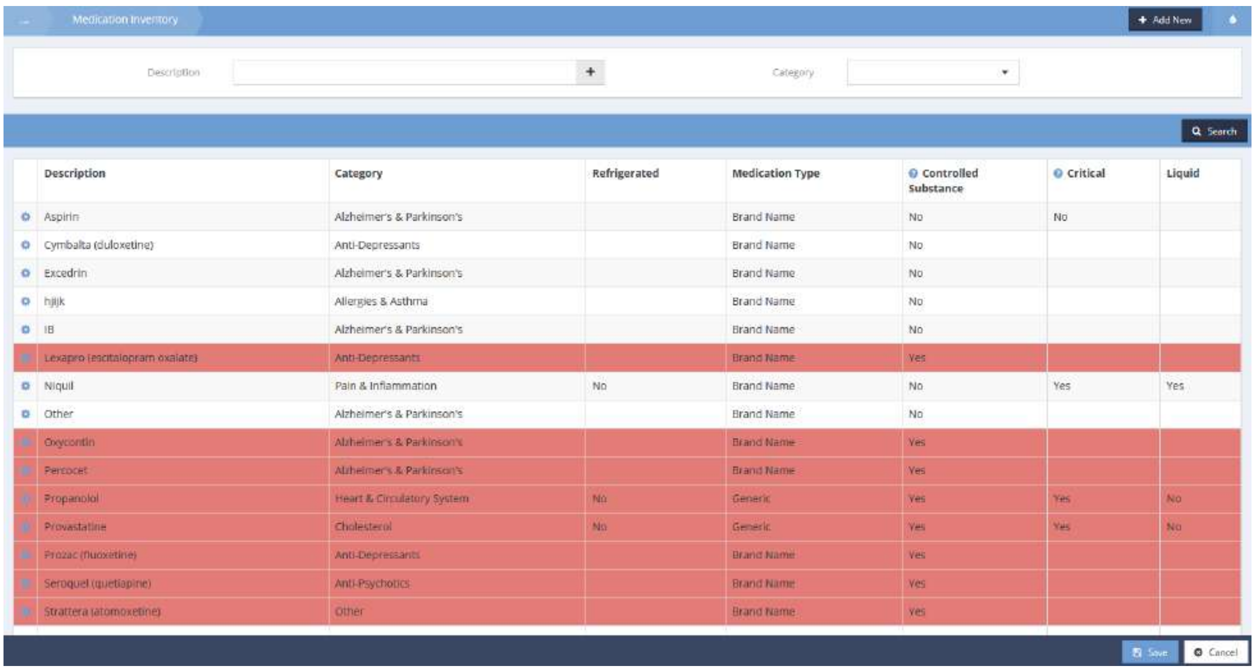


Click the action gear  and click Edit to edit an existing medication.

The Edit Medication Inventory form displays.



Make any necessary changes and click Save when finished. The Medication Inventory form displays.

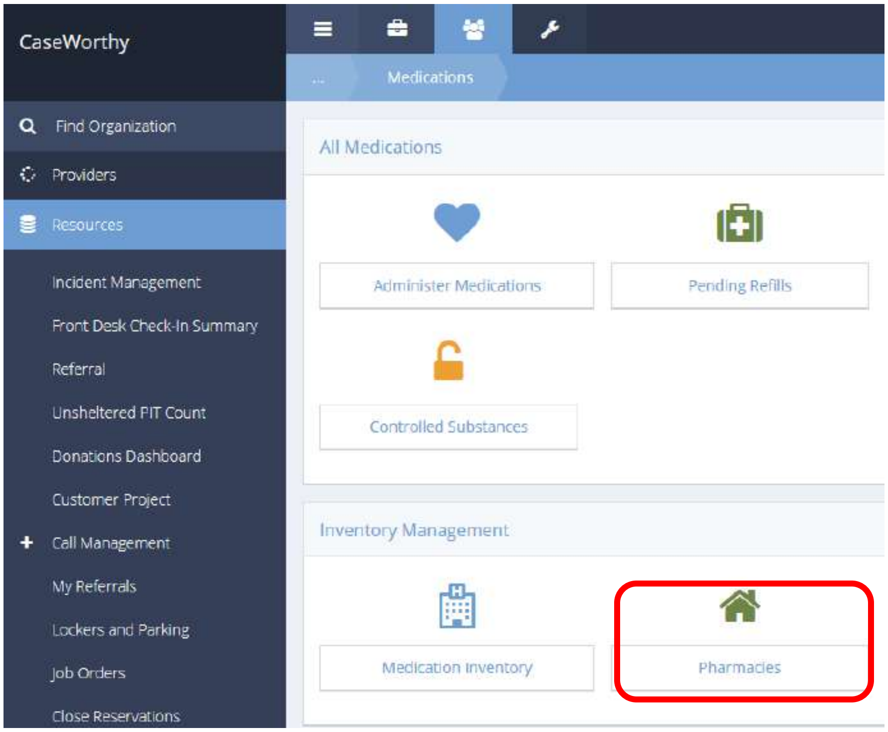


Description	Category	Refrigerated	Medication Type	Controlled Substance	Critical	Liquid
Aspirin	Alzheimer's & Parkinson's		Brand Name	No	No	
Cymbalta (duloxetine)	Anti-Depressants		Brand Name	No		
Excedrin	Alzheimer's & Parkinson's		Brand Name	No		
hjijk	Allergies & Asthma		Brand Name	No		
IB	Alzheimer's & Parkinson's		Brand Name	No		
Lexapro (escitalopram oxalate)	Anti-Depressants		Brand Name	Yes		
Niquil	Pain & Inflammation	No	Brand Name	No	Yes	Yes
Other	Alzheimer's & Parkinson's		Brand Name	No		
Oxycontin	Alzheimer's & Parkinson's		Brand Name	Yes		
Percocet	Alzheimer's & Parkinson's		Brand Name	Yes		
Propanolol	Heart & Circulatory System	No	Generic	Yes	Yes	No
Provastatine	Cholesterol	No	Generic	Yes	Yes	No
Prozac (fluoxetine)	Anti-Depressants		Brand Name	Yes		
Seroquel (quetiapine)	Anti-Psychotics		Brand Name	Yes		
Strattera (atomoxetine)	Other		Brand Name	Yes		

Click Save when finished editing.

Pharmacies

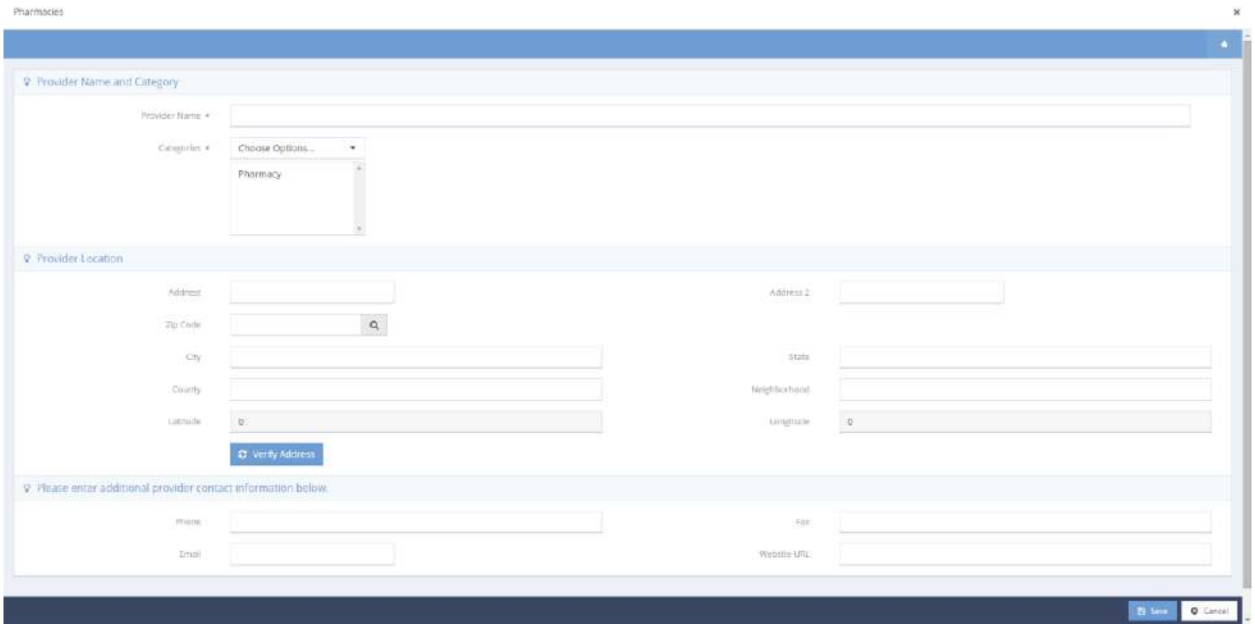
Objective: View, edit, or add new pharmacy providers.



Click the Pharmacies icon. The Pharmacies Providers form displays.

To search for a provider, enter the name in the Provider Name field and click the Search button. To add a new provider, click the + button.

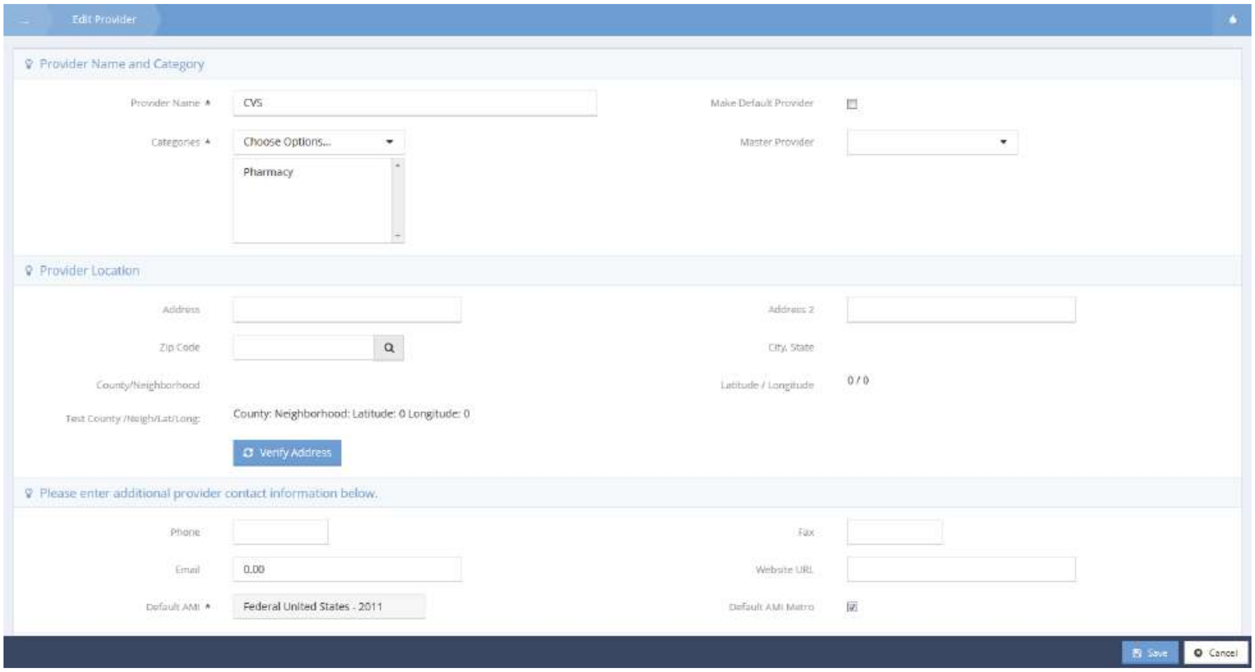
The Edit Pharmacy Provider form displays.



Fill out all required info and click Save when finished. The Pharmacies Providers form displays.

To edit an existing provider, click the action gear next to the provider name and click Edit.

The Edit Provider form displays.



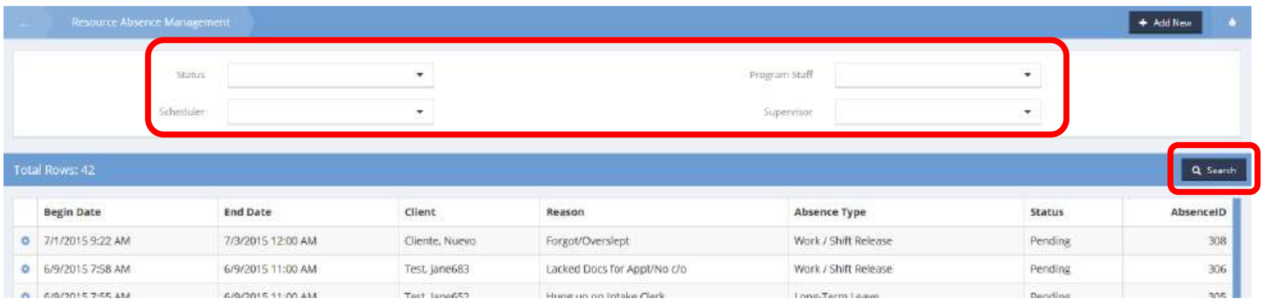
Make any necessary changes and click Save when finished.
Click Done when finished.

Excused Absences

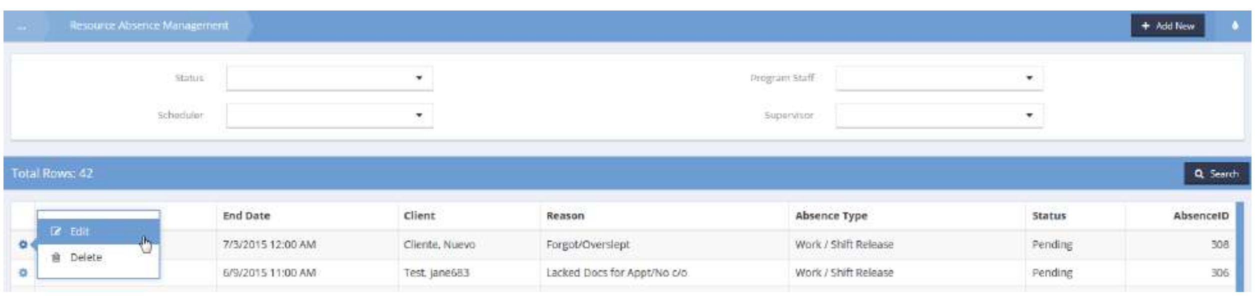
Resource Absence Management

Objective: View or edit client excused absences.

The Resource Absence Management displays a list of absences. To filter the list, use the drop-down lists and click the Search button.

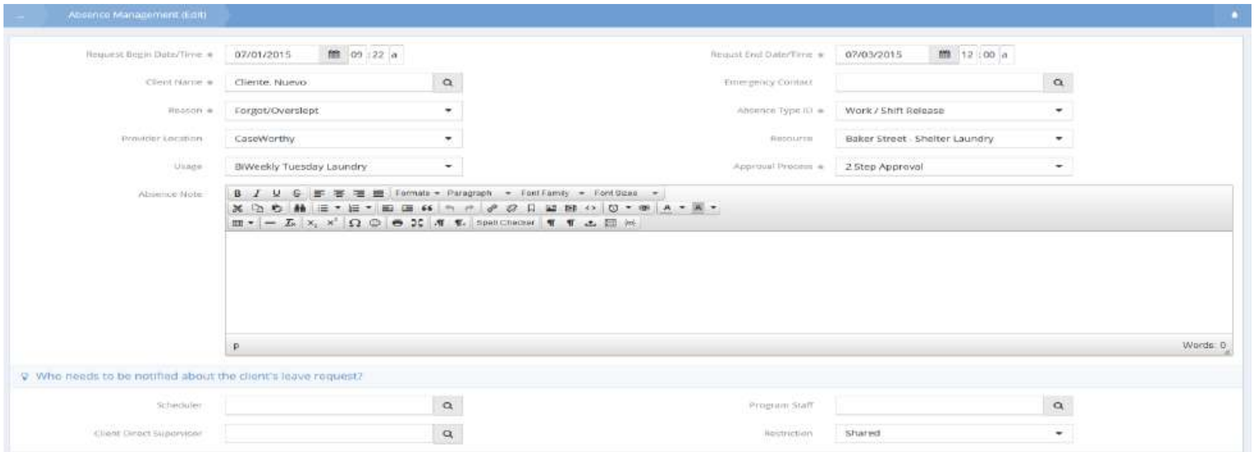


To edit an excused absence, click its action gear icon and select Edit.



The Absence Management (Edit) form displays. Make any desired changes and click 

when finished.

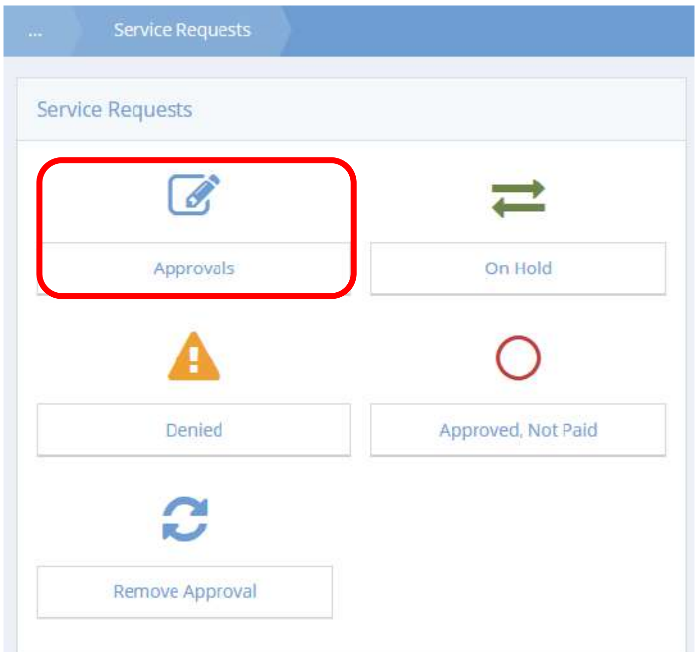


Approvals

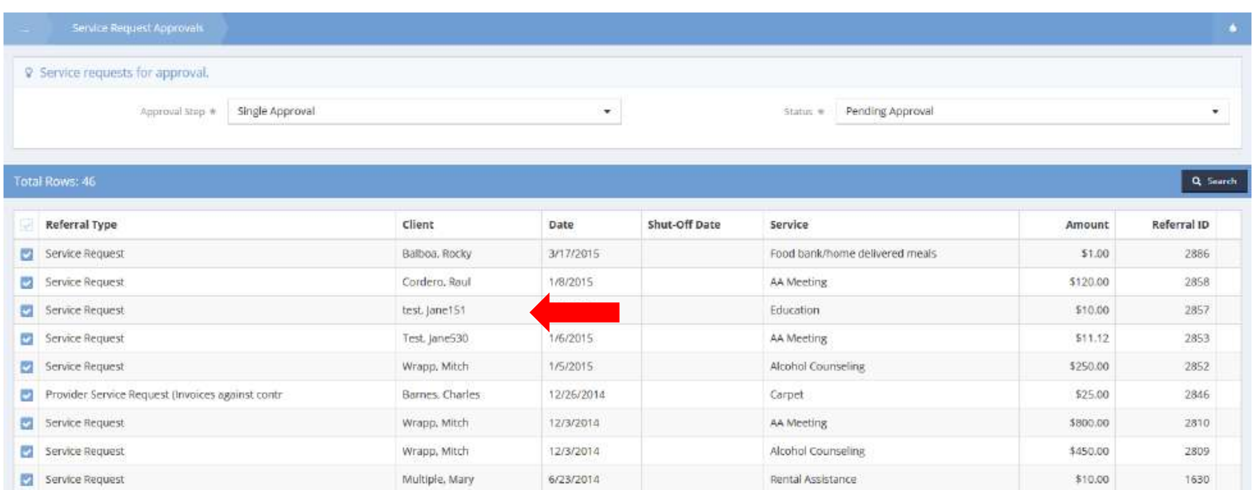
The Client Project Time, Case Note, SA / Time Service Request, Gift Card Transfers, Incident Reports, Service Obligations and General areas of approvals all function in the same way as outlined in Service Requests.

Service Requests

To approve service requests, first click the Approvals icon in the Service Requests dashboard.

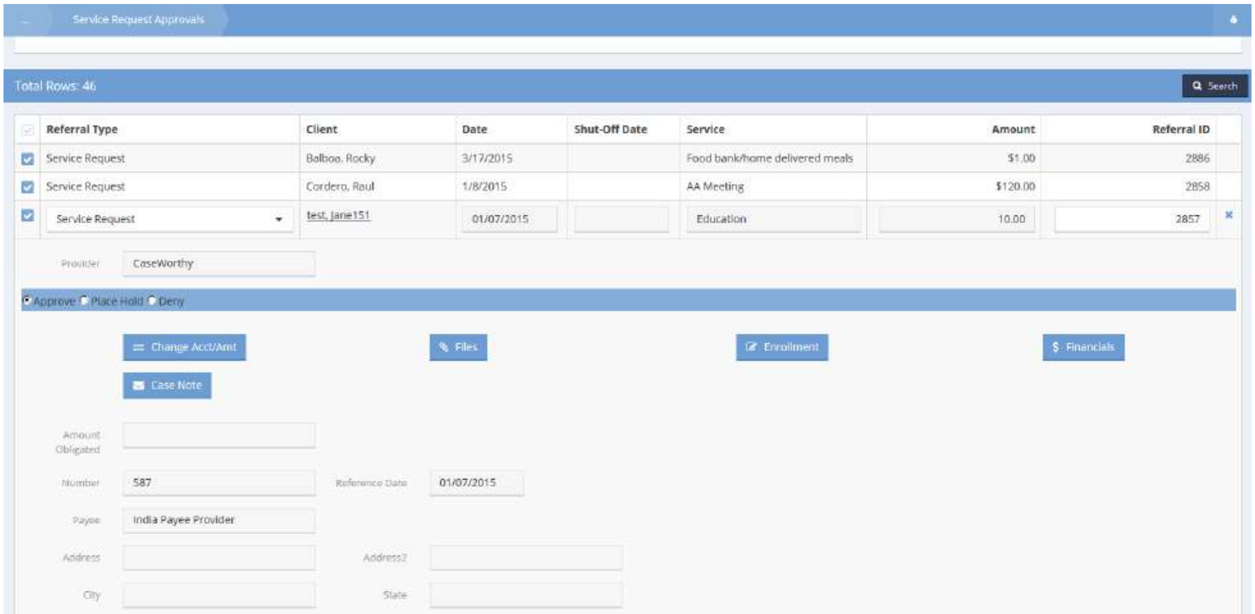


Here all Service Requests can be approved. Use the drop-down boxes to select the appropriate approval step and referral type. Select Search and a list matching the search criteria displays.

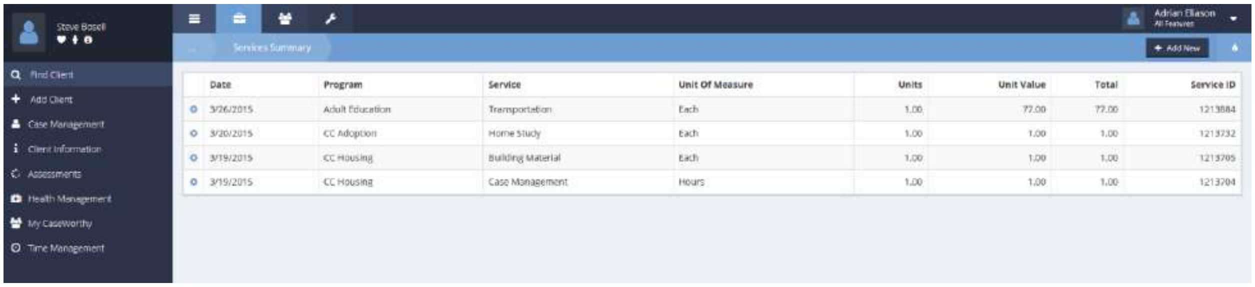


Select the blue checkbox  next to the client's name to approve the request.

Once the request is approved, the system changes the status from Pending Approval to Accepted/ Approved and post the service under the approved services list.

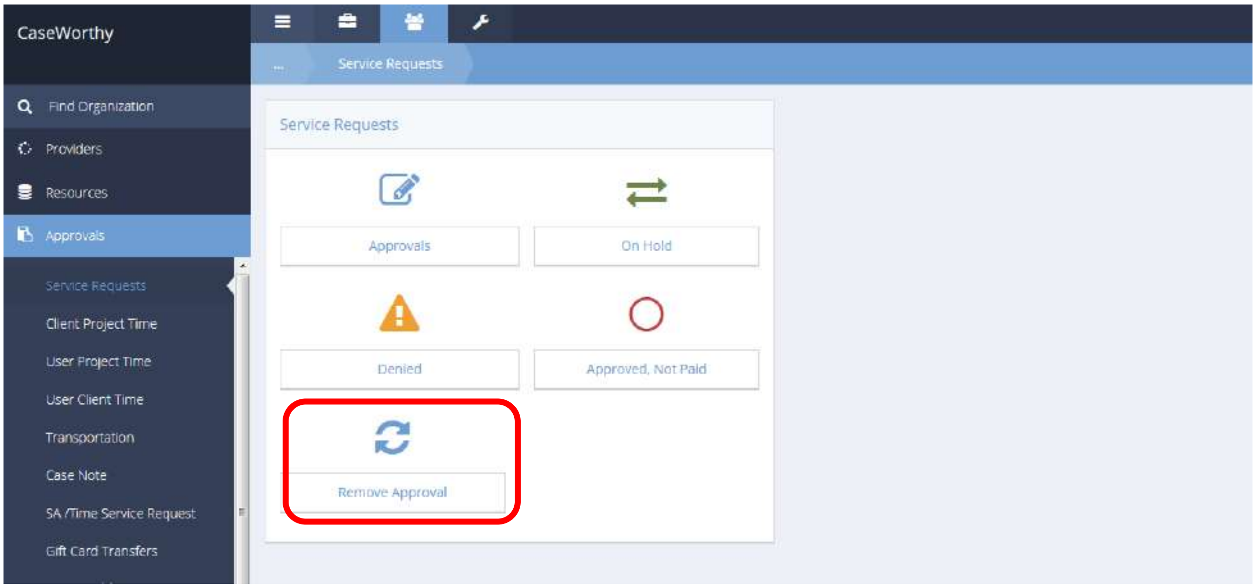


The service also shows up under the client's service list.

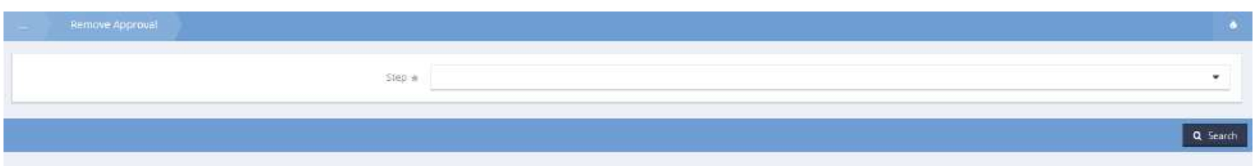


Remove Approval

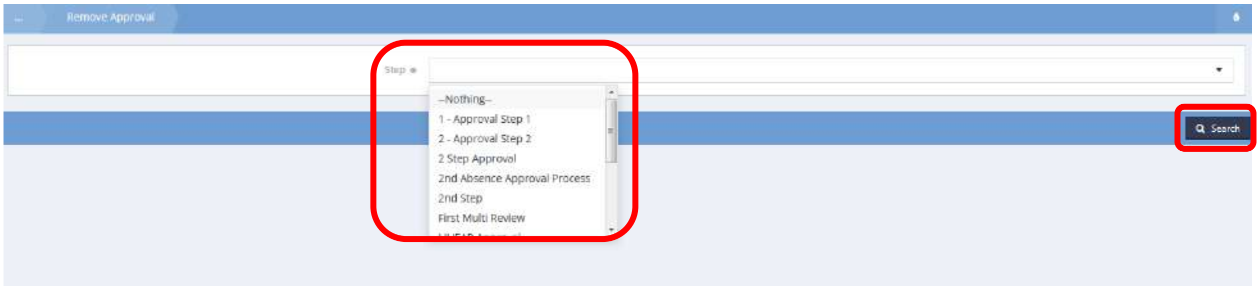
Objective: Undo an approval.



Click on the Remove Approval icon on the Service Requests menu. The Remove approval form displays.

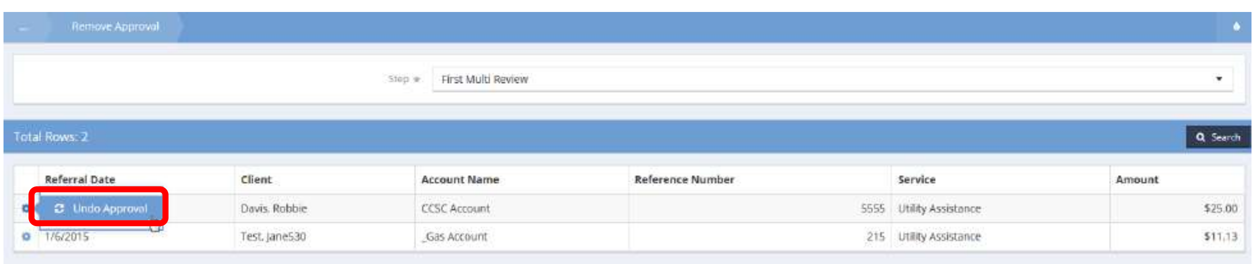


Click on the down arrow icon for Step and select the desired value from the drop-down list that appears.

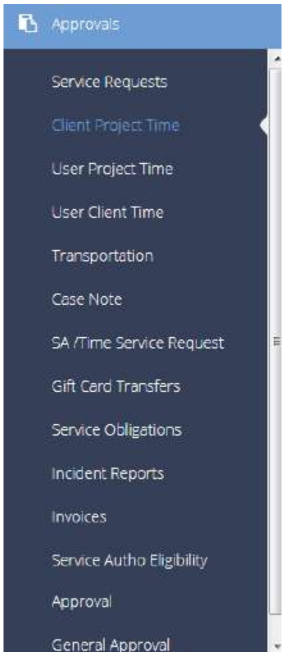


Click on the Search button. A list of approved service requests displays.

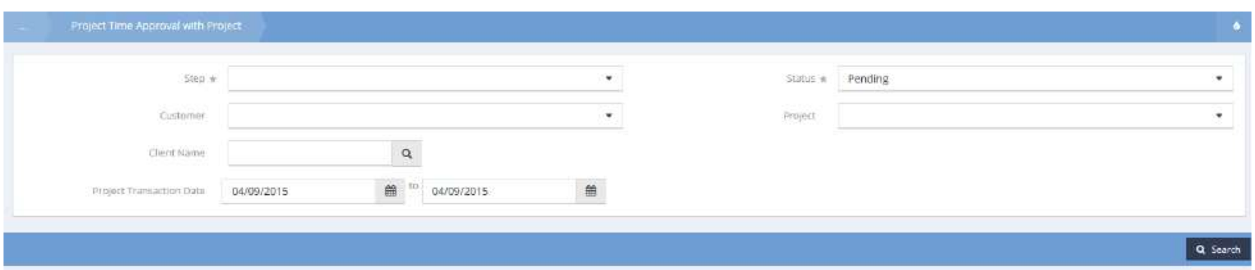
Click on the action gear icon associated with the desired service request and select Undo Approval.



Client Project Time



Use this area to approve client project time. The functionality works the same as in Service Request Approvals outlined above

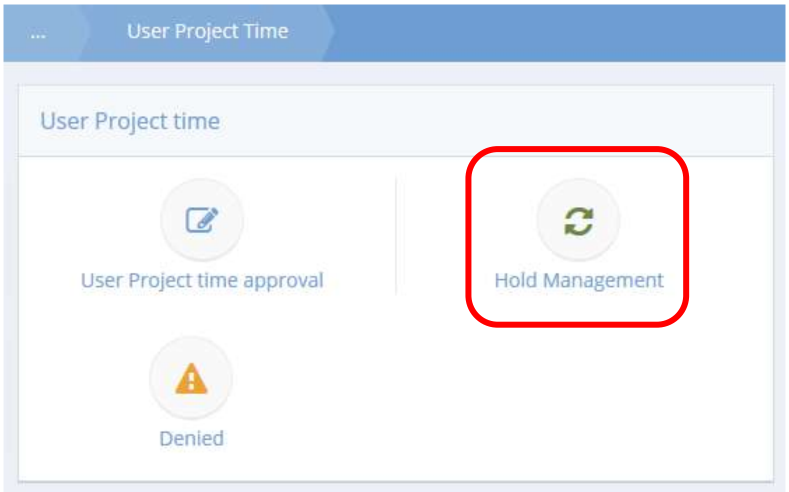


User Project Time

User Project Time Hold

Objective: View and release holds for user project time.

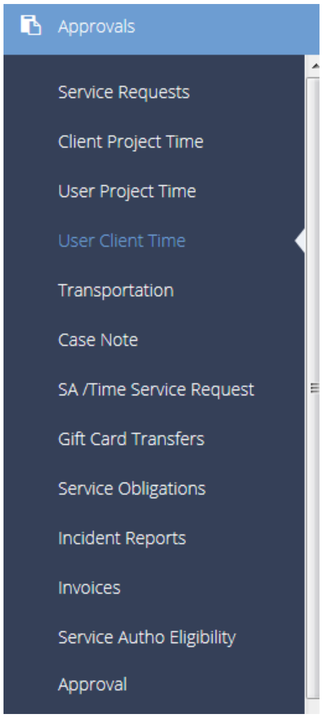
Navigation: Organization>Approvals>User Project Time



Click the icon for Hold Management. The User Project Time Hold form displays.

Holds are released in the same way as described in the Background Check section of this document.

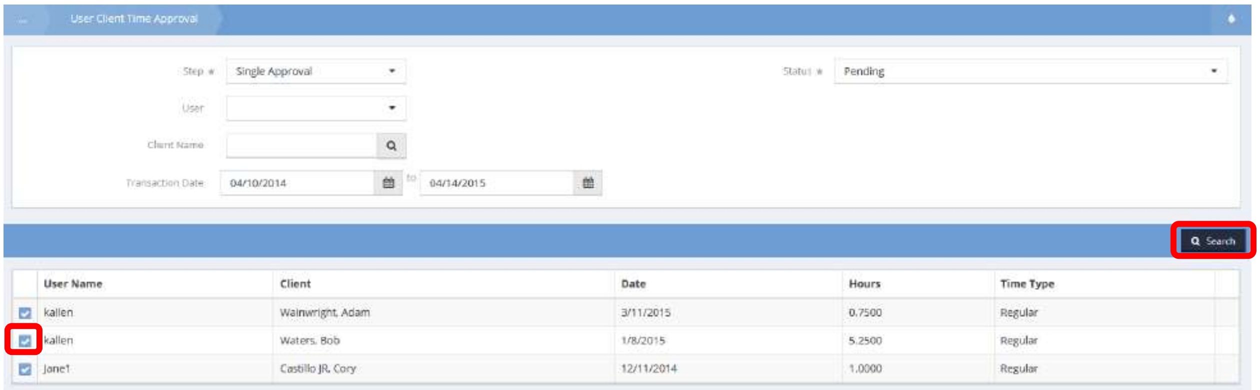
User Client Time



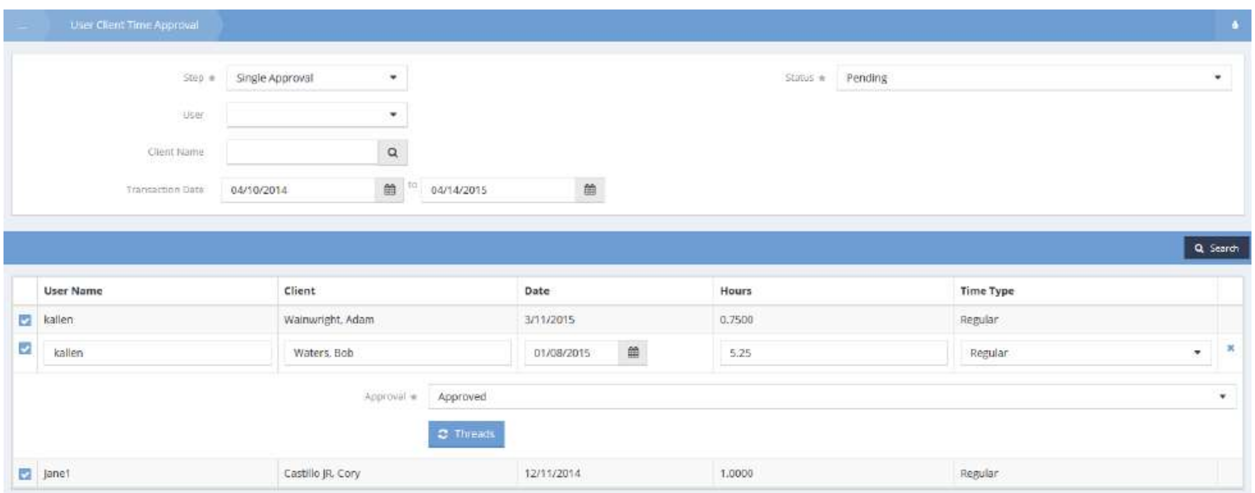
User Client Time Approval

Objective: Approve client time.

The User Client Time Approval form displays. Select values for step and status from their drop-downs lists. Limit the resultant list by selecting a user value and a client name. Enter the desired date range. Click on the Search button.



To approve client time, click on the desired blue checkbox. The row expands with the approval defaulted to approved.

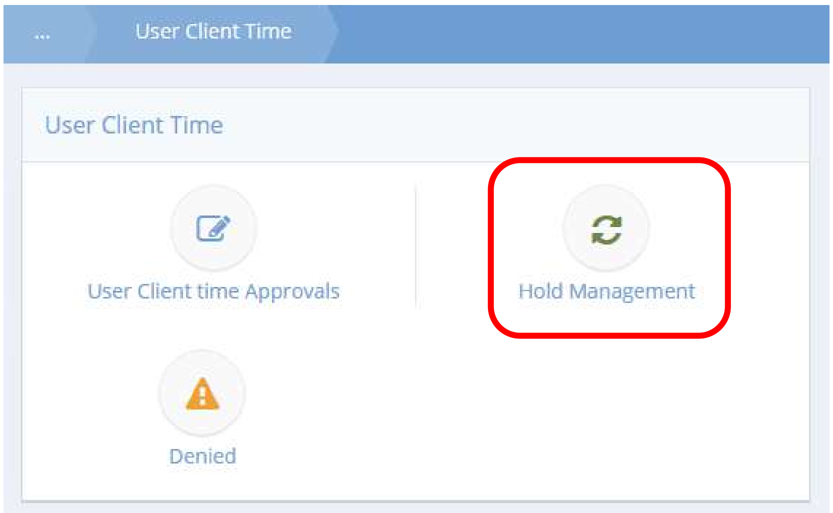


Make any desired changes and click on the Save button.

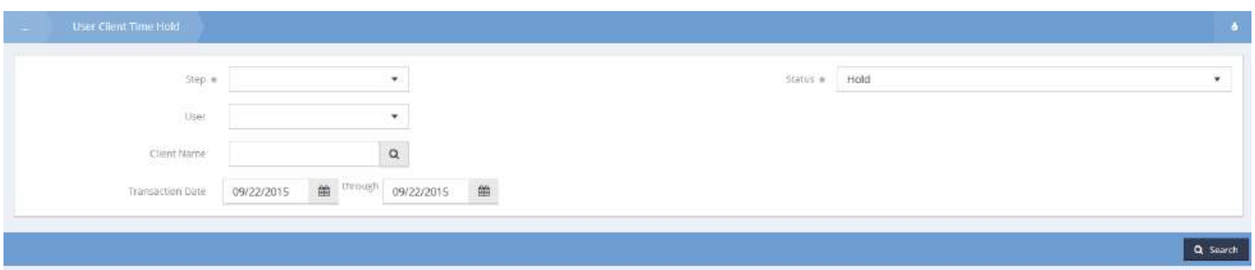
User Client Time Hold

Objective: View and release user client time holds.

Navigation: Organization>Approvals>User Client Time

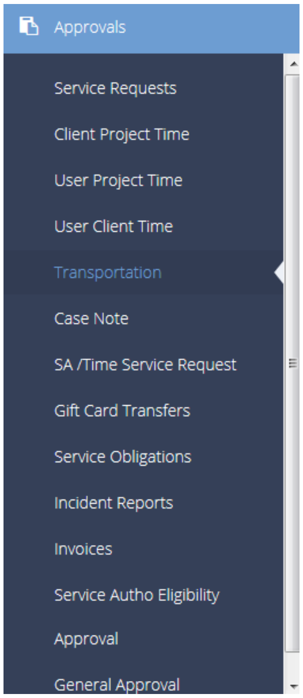


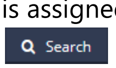
Click the icon for Hold Management. The User Client Time Hold form displays.



Holds are released in the same way as described in the Background Check section of this document.

Transportation



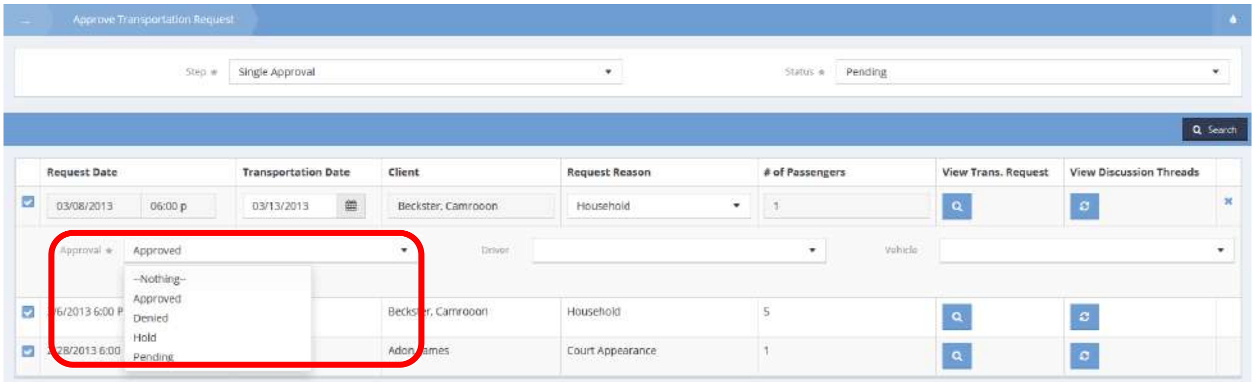
Once a transportation request has been filed, the request must be approved before it can be completed. To approve a transportation request, select the appropriate Approval Process in the Step field. The step in the approval process is assigned to a team. The system only displays steps for the teams where the user is a member. Select the 

button. Pending requests display.

To change the request status, click the blue checkbox  next to the Request Date.

NOTE: ***If the request is denied, a text box pops up that requests a reason for the denial. Denied requests status is final and cannot be changed; to provide the denied service, a whole new request must be filed.***

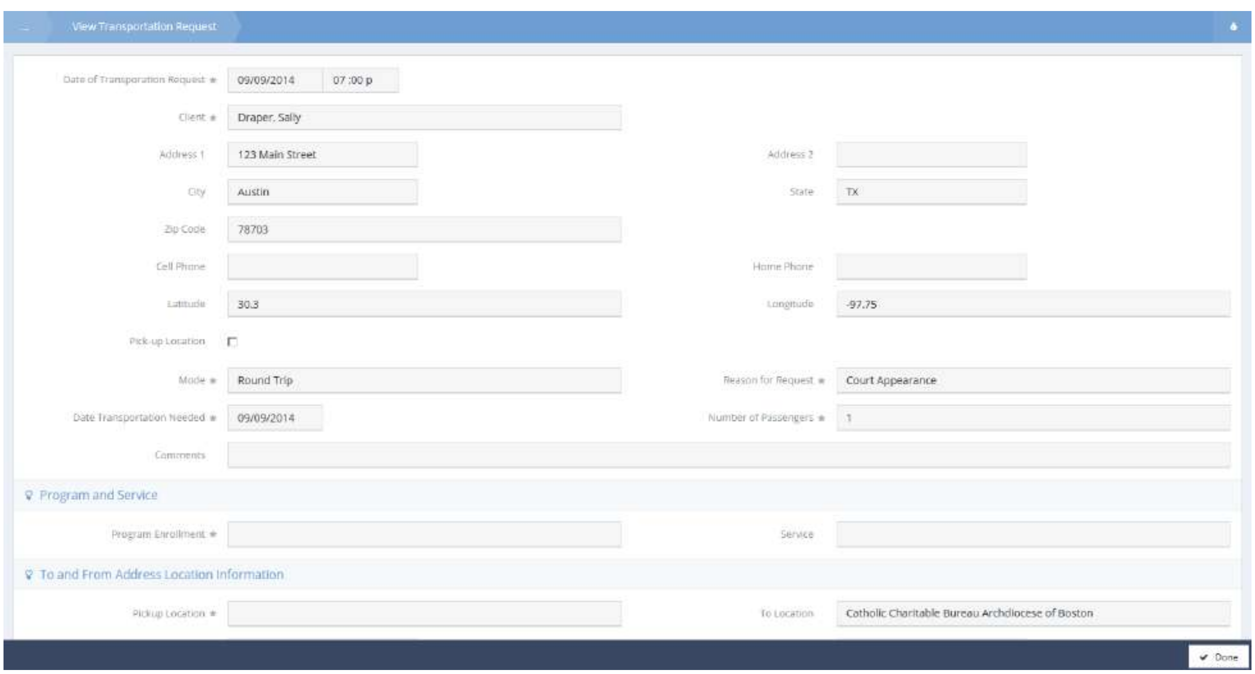
The option to approve, deny, or put the request on hold appears.



The option to assign the driver and vehicle also appears in the expanded field. If assigning a driver and vehicle at approval time, the Status defaults to Driver and Vehicle Assigned. Otherwise, the Status is "Approved". Select Save when finished.

Assigning a Driver and Vehicle

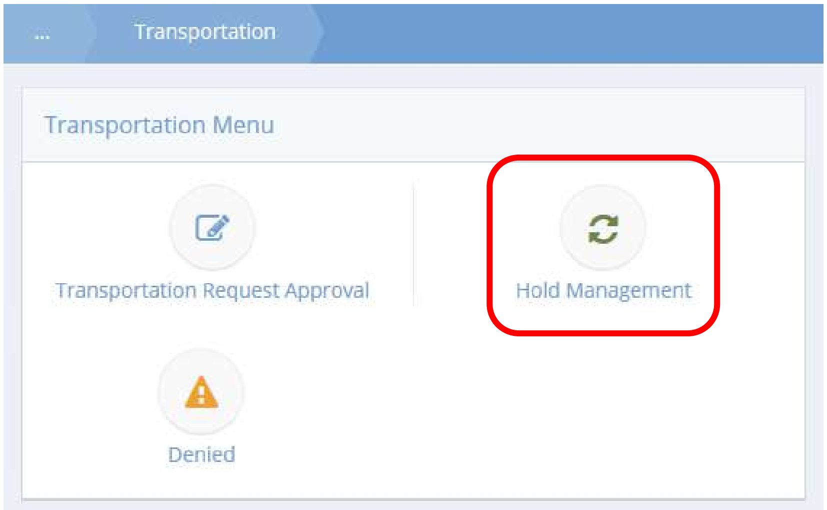
Once a transportation request has been approved, the next step is usually to assign a driver and a vehicle for the job. Select a driver from the drop-down list. Select a vehicle from the drop-down list. To verify any info for the request, click the magnifying glass icon under View Trans. Request. Click Done when finished.



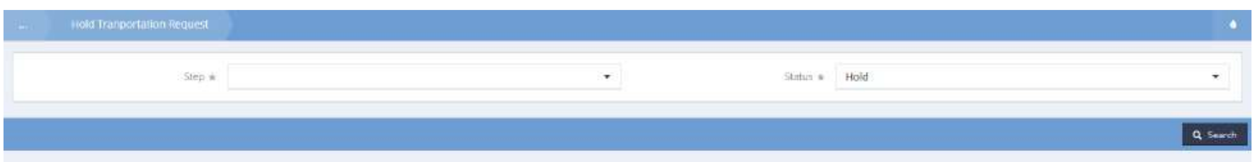
Hold Transportation Request

Objective: View and release holds on transportation requests.

Navigation: Organization>Approvals>Transportation



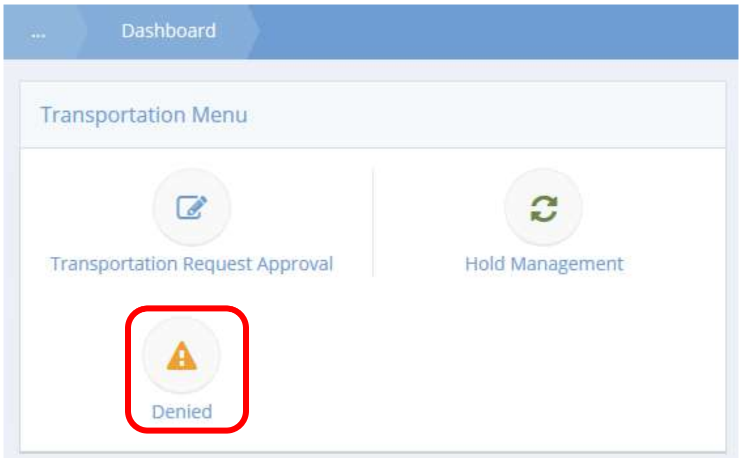
Click the icon for Hold Management. The Hold Transportation Request form displays.



Holds are released in the same way as described in the Background Check section of this document.

Transportation Denied

Objective: View denied transportation requests.



Click the icon for Denied. The Transportation Denied form displays.

Denied Date	Denied Reason	Denied By	Client
6/17/2015	Denied Test Reason	Bingel, Brian	Irons, Jeremy

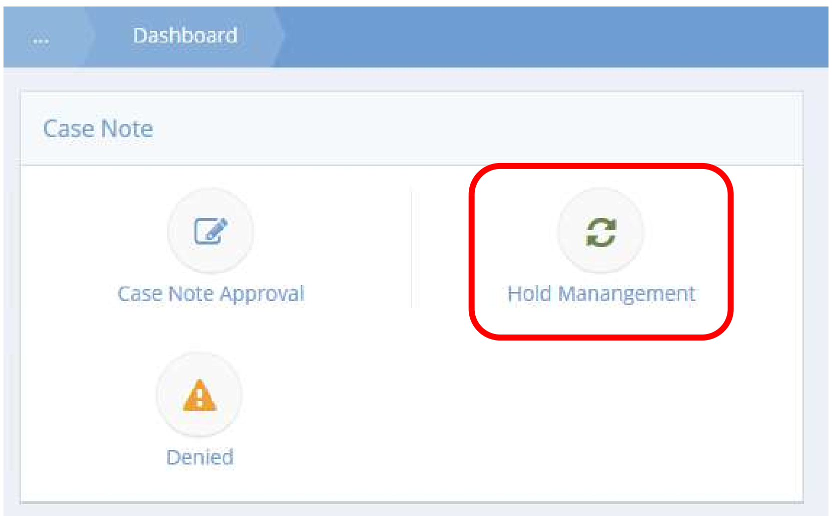
Any denied transportation requests display in the summary form.

Case Note

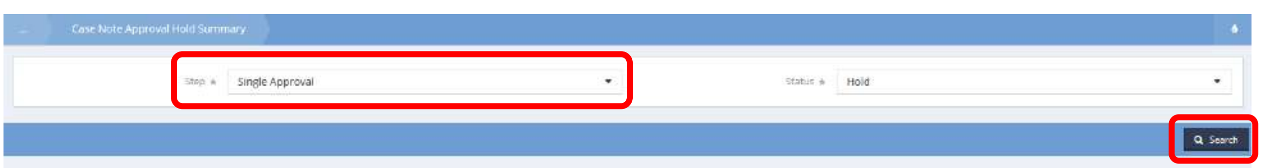
Case Note Approval Hold Summary

Objective: Manage case note approvals.

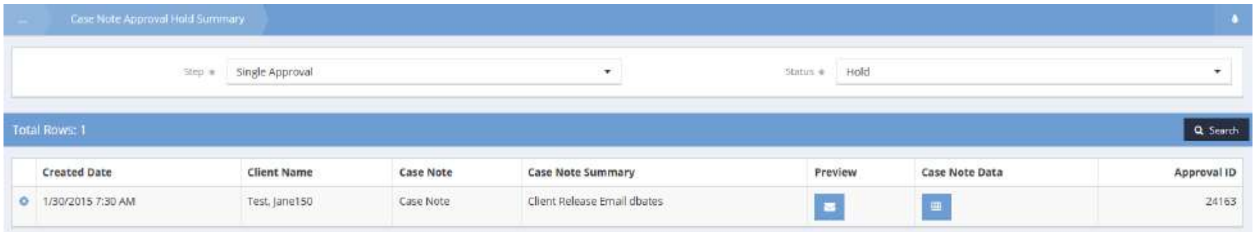
Hold Management



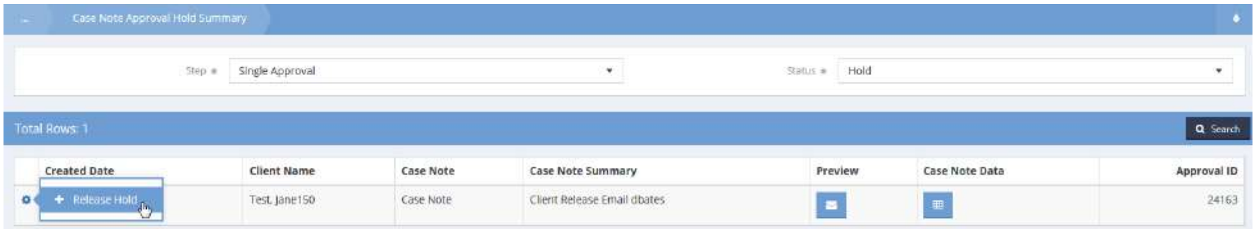
Click the icon for Hold Management. The Case Note Approval Hold Summary form displays. Select a Step using the drop-down list and click the Search button.



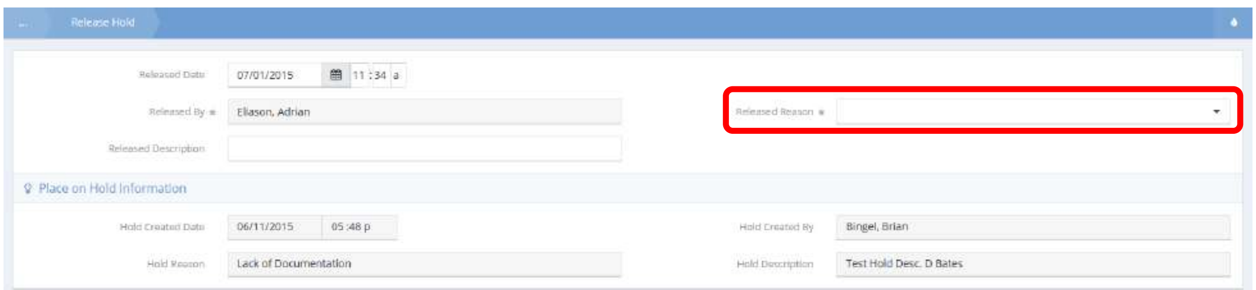
Results display in the spreadsheet below.


Case Note Approval Hold Summary
Step
Single Approval
Status
Hold
Total Rows: 1
Search
Created Date
Client Name
Case Note
Case Note Summary
Preview
Case Note Data
Approval ID
1/30/2015 7:30 AM
Test, Jane150
Case Note
Client Release Email dbates
24163

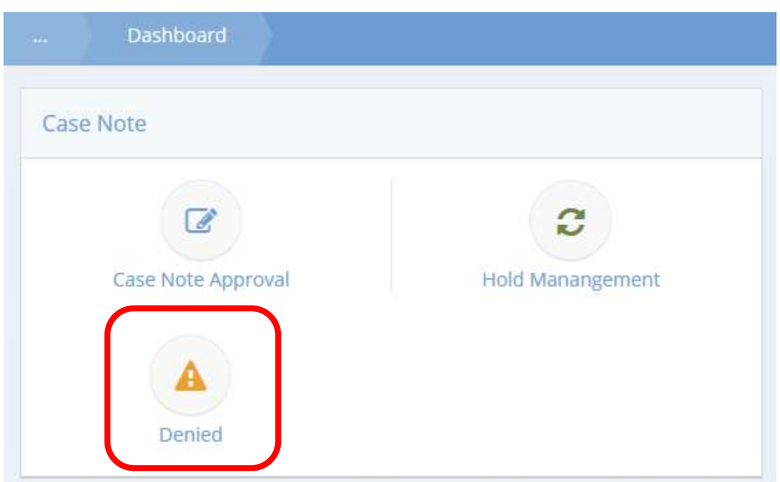
To release a hold, click the case note’s action gear icon and select Release Hold.



The Release Hold form displays. Select a Released Reason from the drop-down list and click Save when finished.

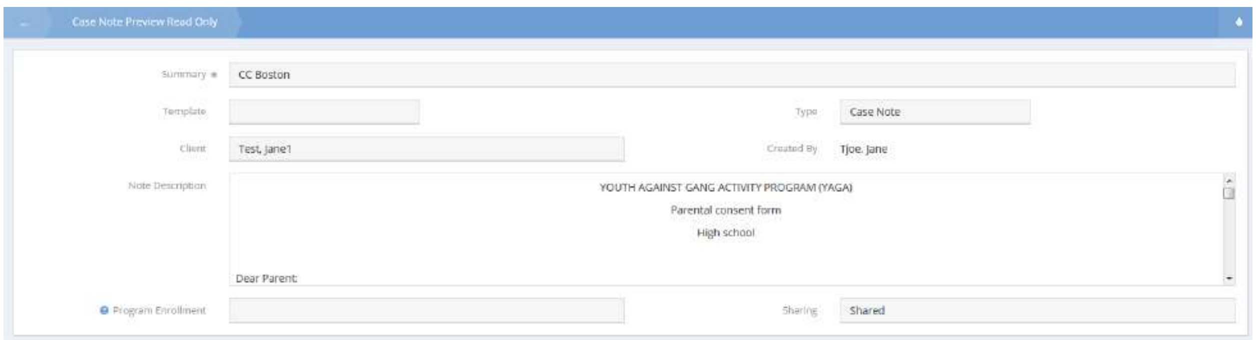


Denied

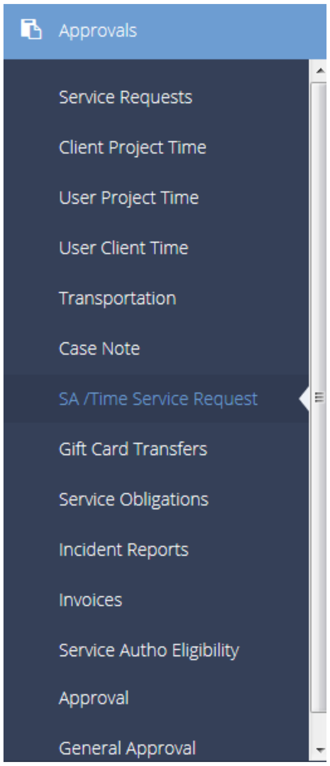


Click the icon for Denied. The Case Note Denied form displays. To view a read only view of the denied case notes, click the blue hyperlinked text in the Case Note Summary column.

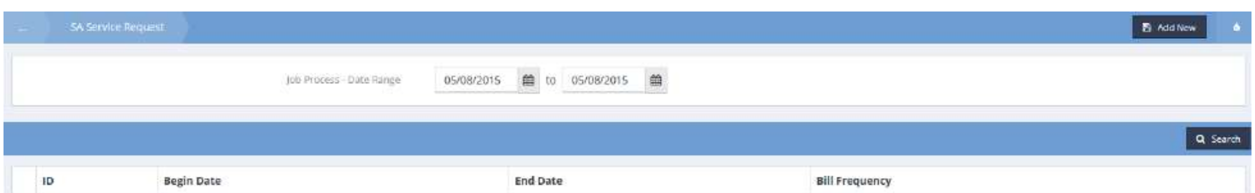
The Case Note Preview Read Only form displays.



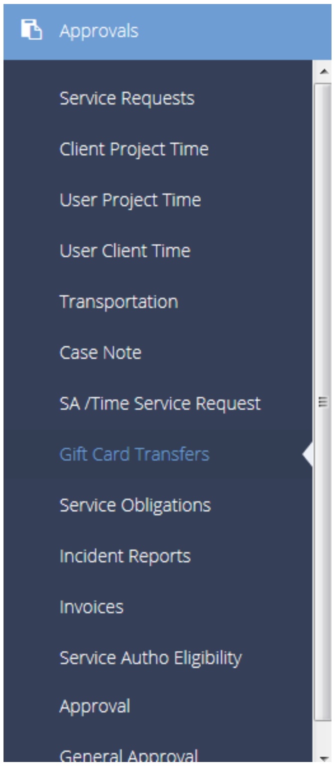
SA / Time Service Request



Use this area to approve incident reports. The functionality works the same as in Service Request Approvals outlined above



Gift Card Transfers

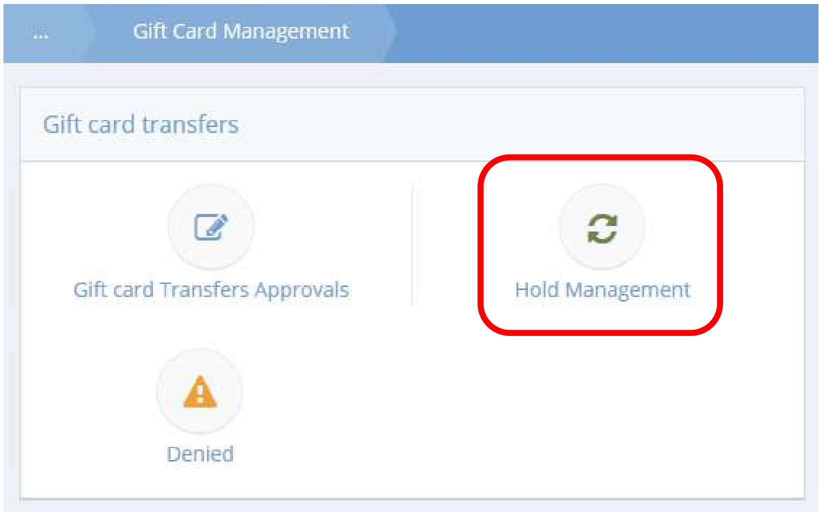


Use this area to approve gift card transfers. The functionality works the same as in Service Request Approvals outlined above

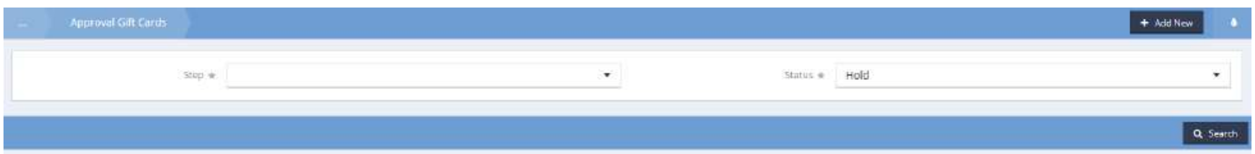
Hold Gift Cards

Objective: View and release holds for gift card transfers.

Navigation: Organization>Approvals>Gift Card Transfers

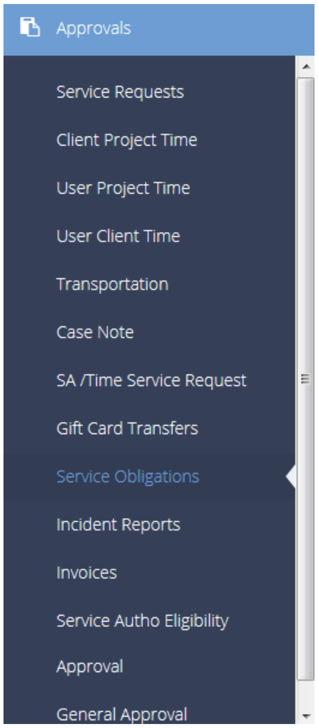


Click the icon for Hold Management. The Approval Gift Cards form displays.



Holds are released in the same way as described in the Background Check section of this document.

Service Obligations

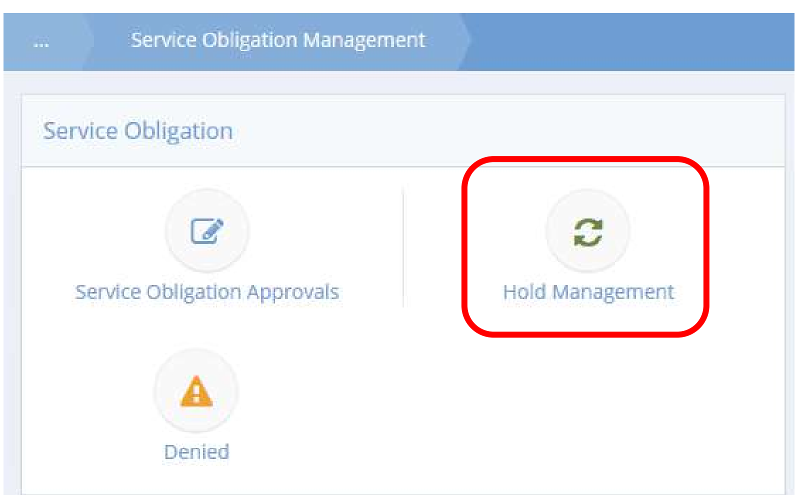


Use this area to approve gift card transfers. The functionality works the same as in Service Request Approvals outlined above

Service obligation hold

Objective: View and release service obligation holds.

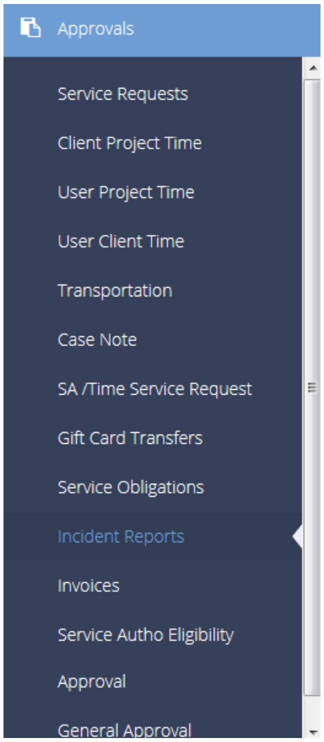
Navigation: Organization>Approvals>Service Obligations



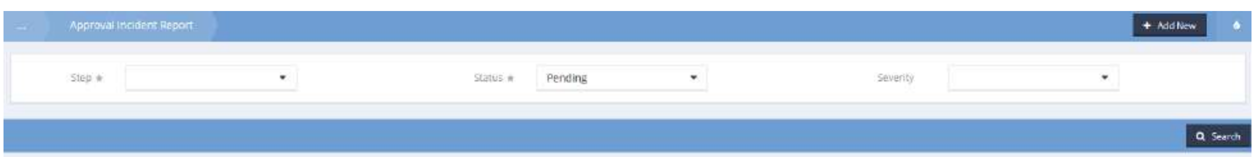
Click the icon for Hold Management. The Service Obligation Hold form displays.

Holds are released in the same way as described in the Background Check section of this document.

Incident Reports



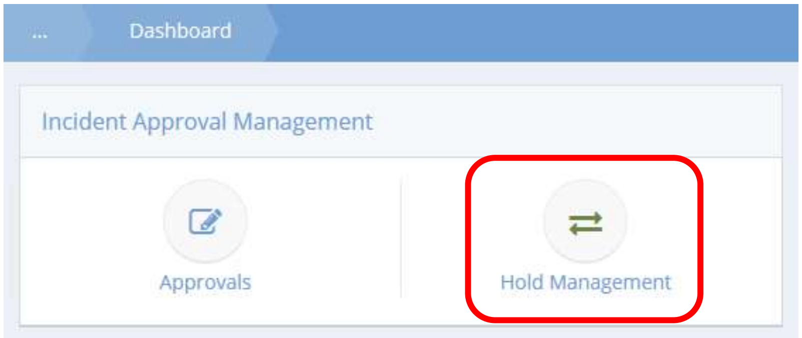
Use this area to approve incident reports. The functionality works the same as in Service Request Approvals outlined above.

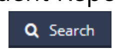


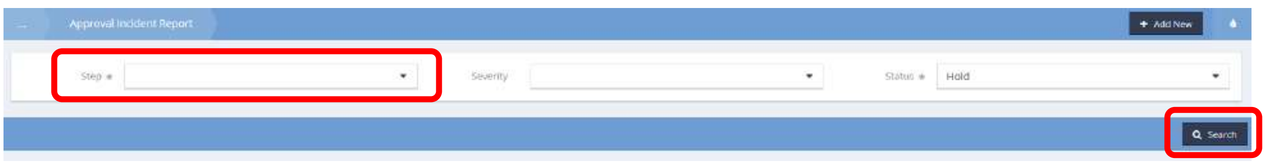
Incident Approval Management

Objective: View or release holds on incident reports on hold.

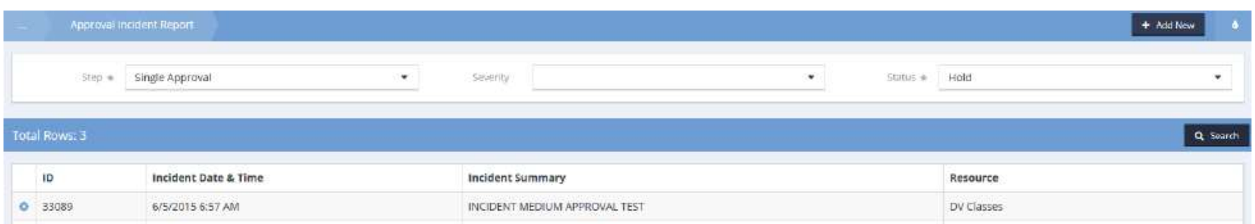
Hold Management



Click the icon for Hold Management. The Approval Incident Report form displays. Select a Step from the drop-down list and select a Severity if desired. Click the  button.

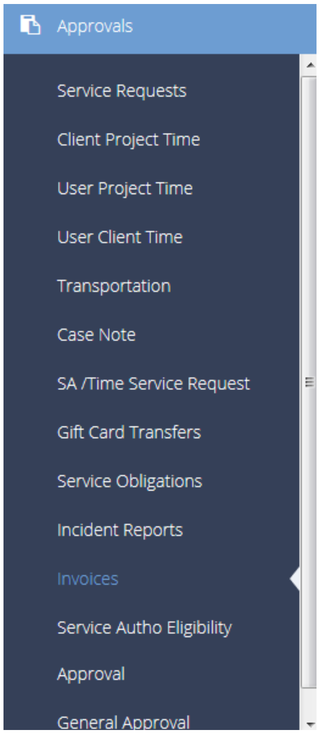


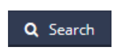
Results display in the spreadsheet below.



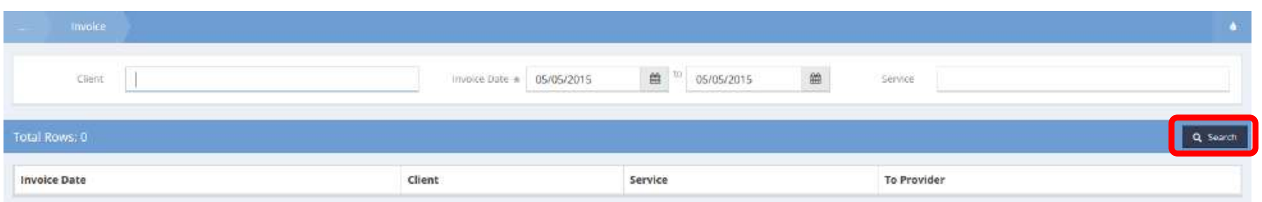
Holds may be released as documented in the Absence Request section of this document.

Invoices

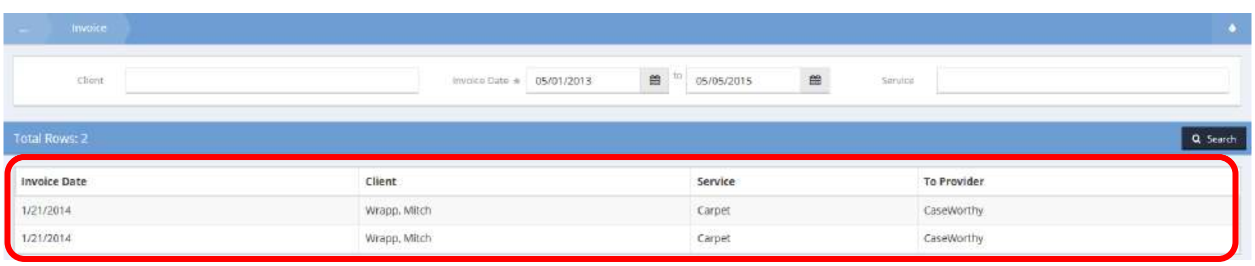


To view invoices, enter any parameters to filter and click the 

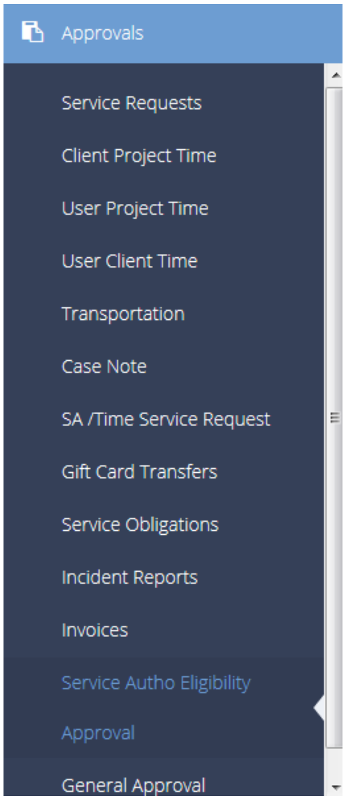
button.



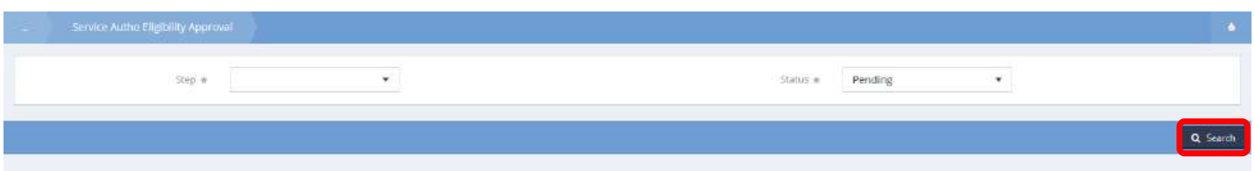
Relevant invoices display in the spreadsheet below.

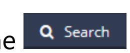


Service Authorization Eligibility

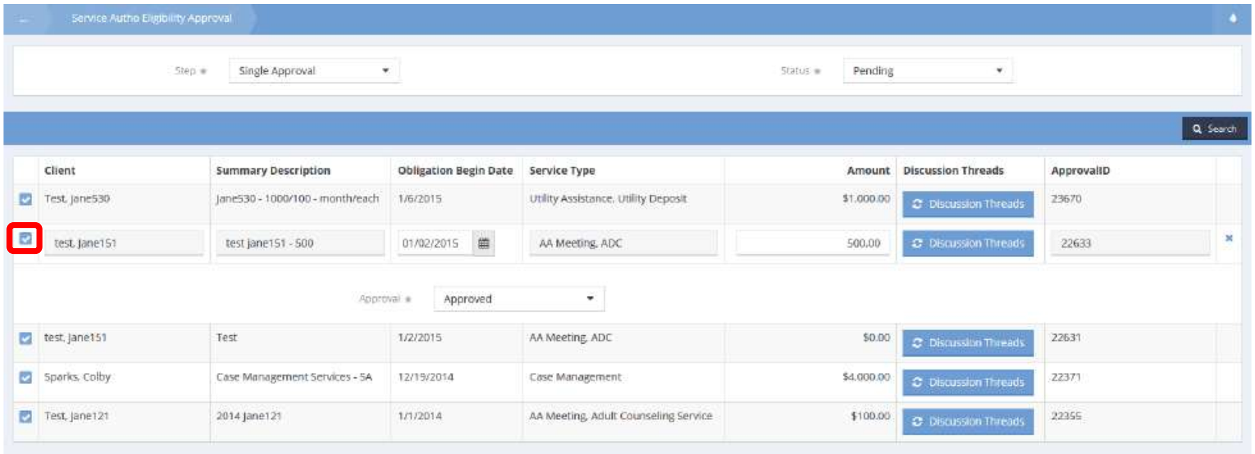


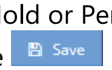
Objective: Approve or deny pending service authorization requests.



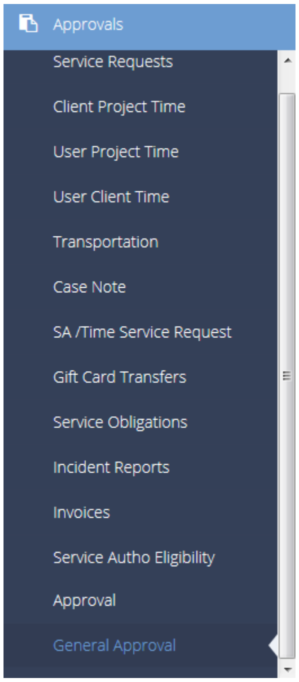
Use the Step and Status drop-down lists to filter results and click the  button.

Results display in the space below.



Changes can only be made if approval status is Hold or Pending. Click the blue checkbox  to modify the date, amount, or approval status. Click on the  button.

General



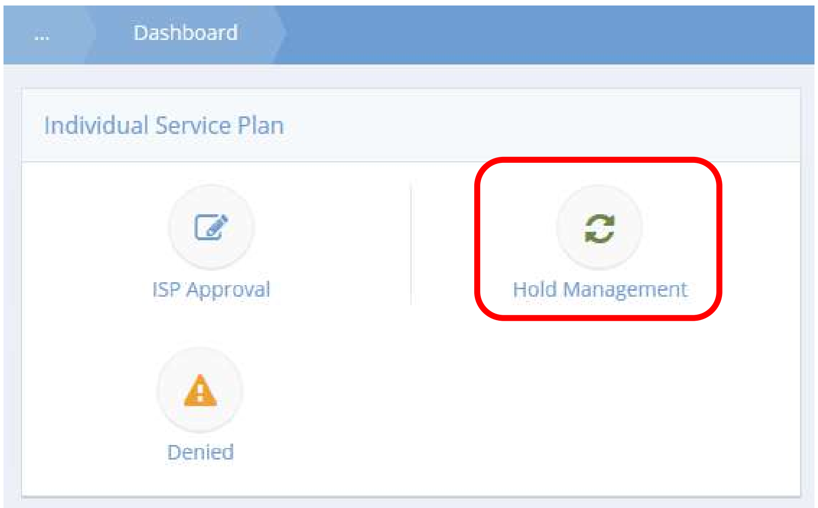
Use this area for any type of approval process. Use the Approval Context Type drop-down list to select the type of approval process to utilize. The functionality works the same as in Service Request Approvals outlined above.

Individual Service Plan

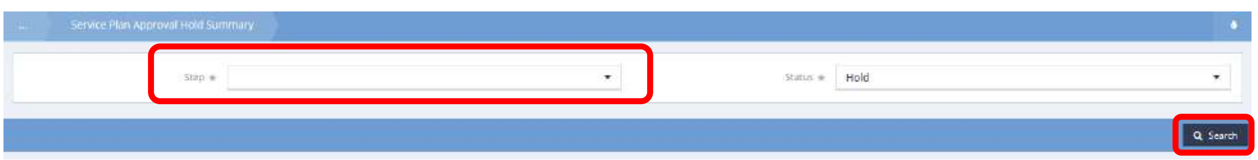
Individual Service Plan Management

Objective: Manage individual service plan requests that have been approved, denied or are on hold.

Hold Management



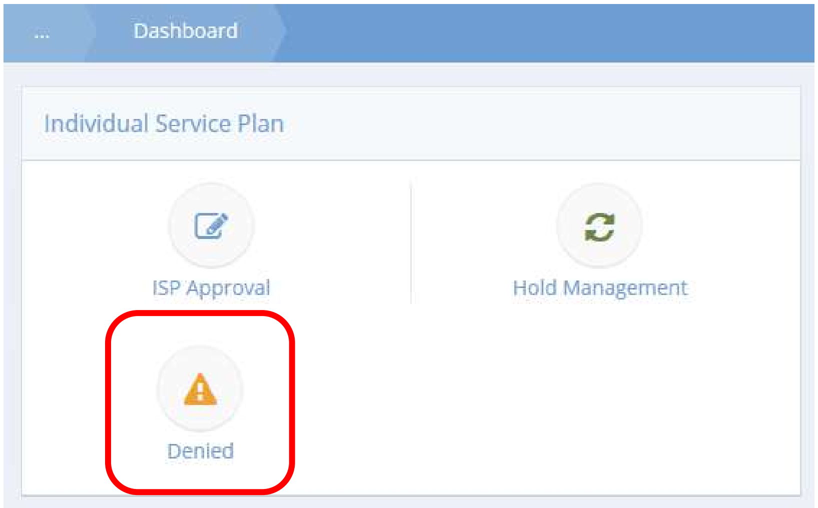
Click the icon for Hold Management. The Service Plan Approval Hold Summary form displays.



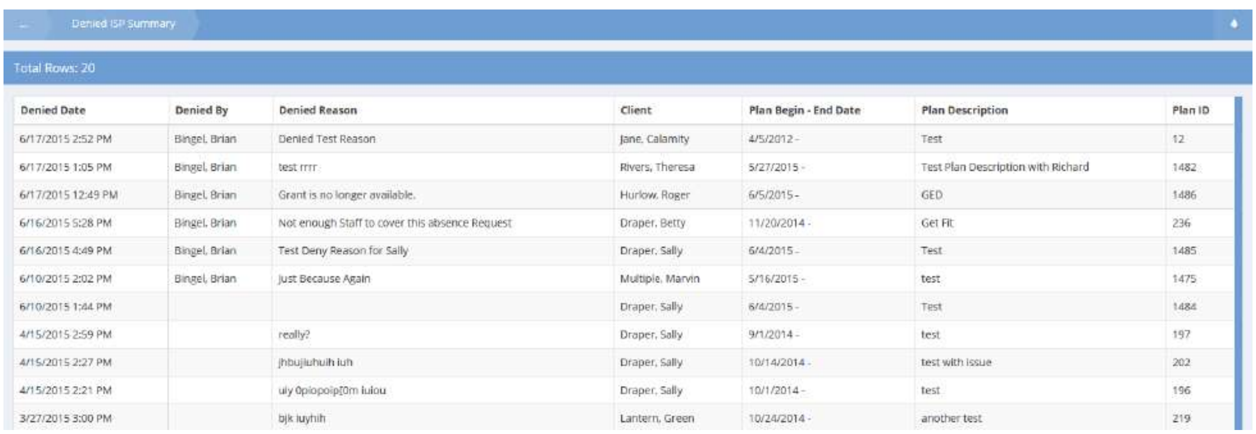
Select a Step from the drop-down list and click the button. Results display in the spreadsheet below.

Holds may be released as documented in the Absence Request section of this document.

Denied



Click the Denied icon. The Denied ISP Summary form displays a list of all denied individual service plans.


Denied ISP Summary

Total Rows: 20

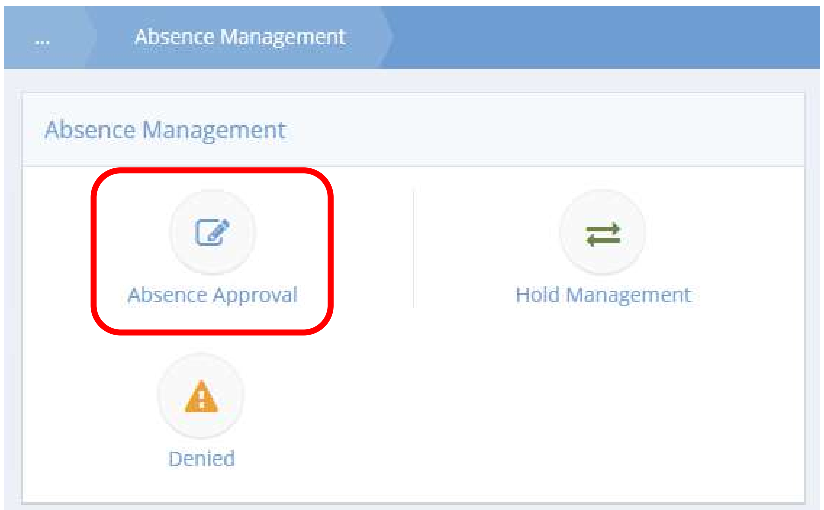
Denied Date	Denied By	Denied Reason	Client	Plan Begin - End Date	Plan Description	Plan ID
6/17/2015 2:52 PM	Bingel, Brian	Denied Test Reason	Jane, Calamity	4/5/2012 -	Test	12
6/17/2015 1:05 PM	Bingel, Brian	test rrrr	Rivers, Theresa	5/27/2015 -	Test Plan Description with Richard	1482
6/17/2015 12:49 PM	Bingel, Brian	Grant is no longer available.	Hurlow, Roger	6/5/2015 -	GED	1486
6/16/2015 5:28 PM	Bingel, Brian	Not enough Staff to cover this absence Request	Draper, Betty	11/20/2014 -	Get Fit	236
6/16/2015 4:49 PM	Bingel, Brian	Test Deny Reason for Sally	Draper, Sally	6/4/2015 -	Test	1485
6/10/2015 2:02 PM	Bingel, Brian	Just Because Again	Multiple, Marvin	5/16/2015 -	test	1475
6/10/2015 1:44 PM			Draper, Sally	6/4/2015 -	Test	1484
4/15/2015 2:59 PM		really?	Draper, Sally	9/1/2014 -	test	197
4/15/2015 2:27 PM		jhbujiuhuih iuh	Draper, Sally	10/14/2014 -	test with issue	202
4/15/2015 2:21 PM		uiy 0piopoip[0m iuiou	Draper, Sally	10/1/2014 -	test	196
3/27/2015 3:00 PM		bjk iuyhih	Lantern, Green	10/24/2014 -	another test	219

Absence

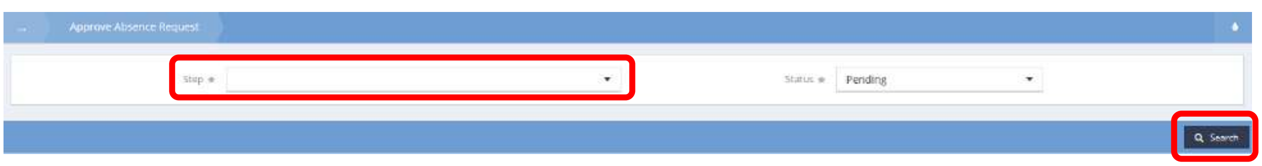
Absence Management

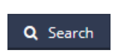
Objective: Approve, put on hold or deny absence requests.

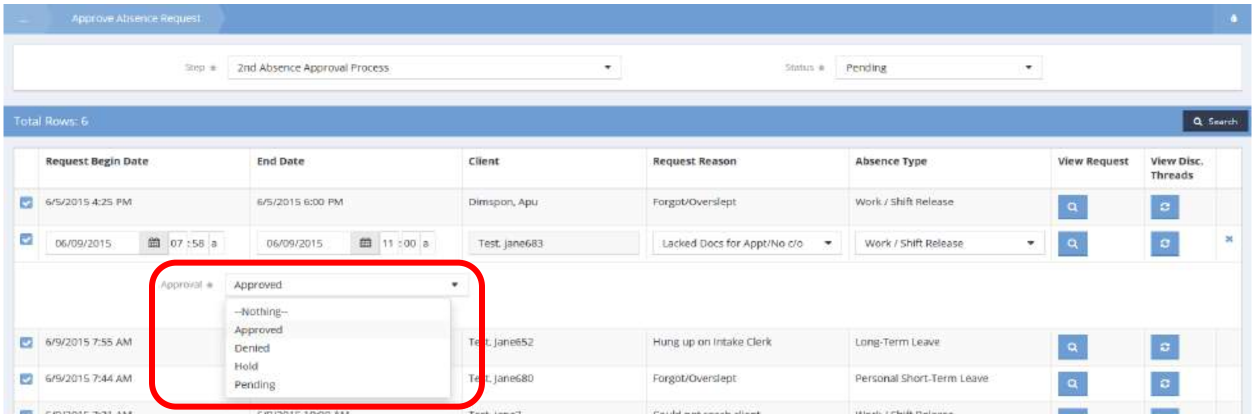
Absence Approval



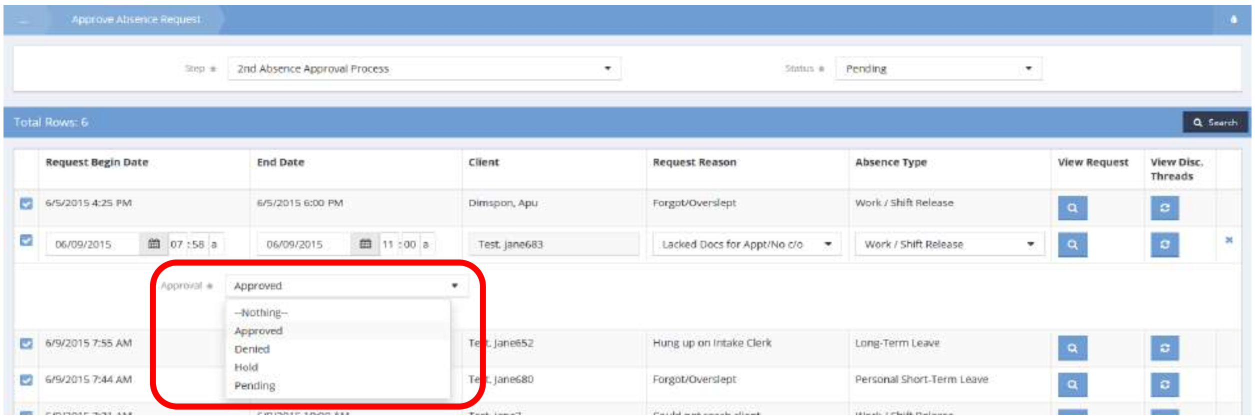
Click the icon for Absence Approval. The Approve Absence Request form displays.



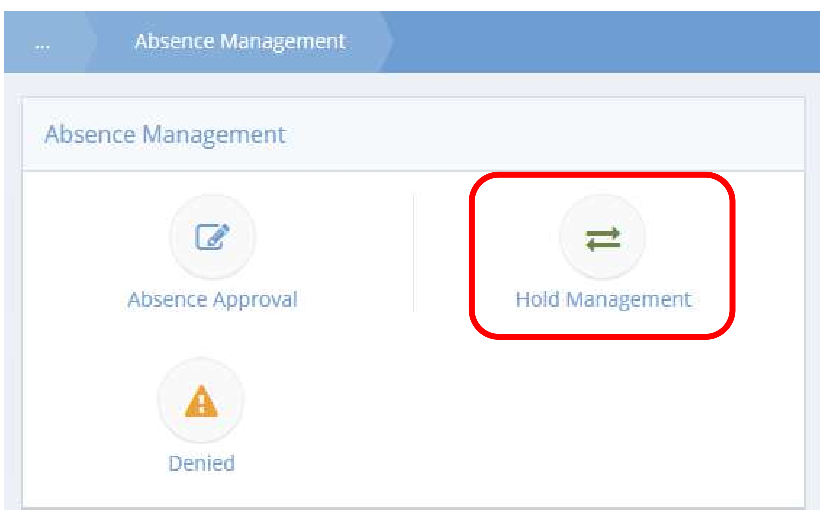
Select a Step from the drop-down list and click the  button. Results display in the spreadsheet below.


Approve Absence Request
Step
2nd Absence Approval Process
Status
Pending
Total Rows: 6
Search
Request Begin Date
End Date
Client
Request Reason
Absence Type
View Request
View Disc. Threads
6/5/2015 4:25 PM
6/5/2015 6:00 PM
Dimspon, Apu
Forgot/Overslept
Work / Shift Release
06/09/2015
06/09/2015
Test, Jane683
Lacked Docs for Appt/No c/o
Work / Shift Release
Approval
Approved
--Nothing--
Approved
Denied
Hold
Pending
6/9/2015 7:55 AM
Hung up on Intake Clerk
Long-Term Leave
6/9/2015 7:44 AM
Forgot/Overslept
Personal Short-Term Leave

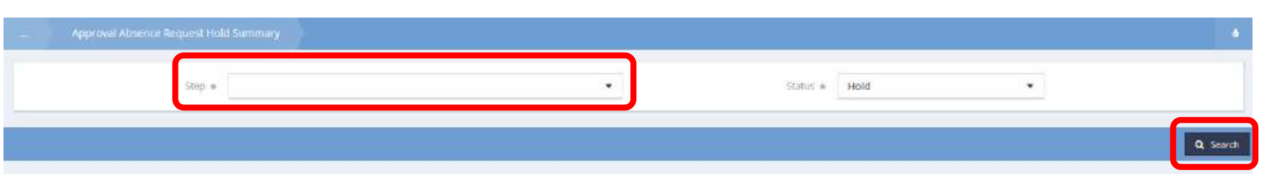
To change the change the status of a request, click the blue checkbox icon and select the desired status from the drop-down list. Make any other desired changes to the request and click Save when finished.



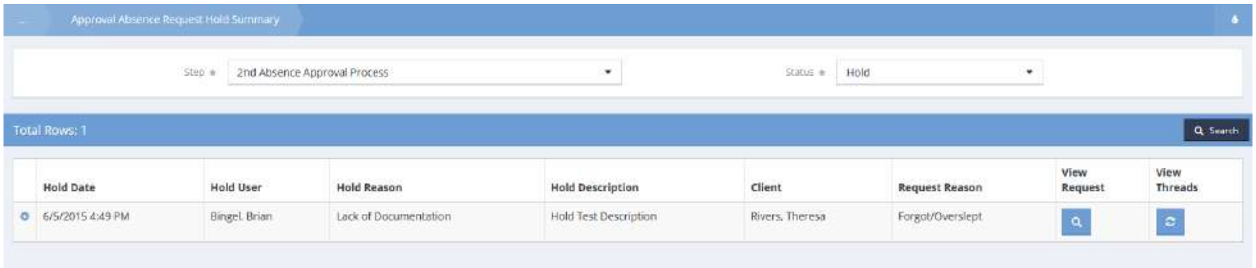
Hold Management



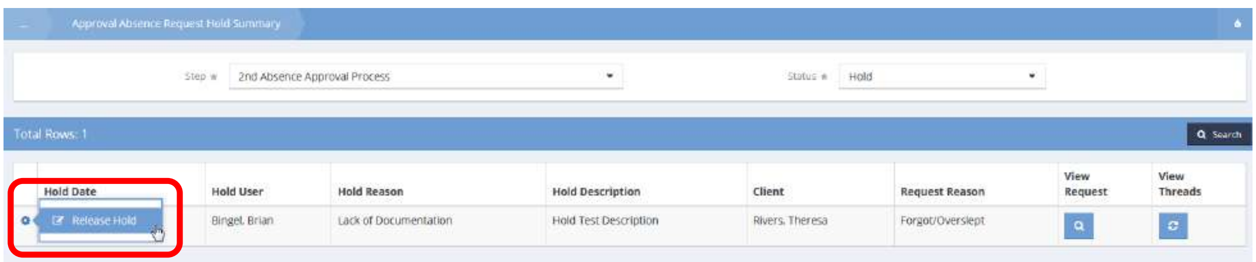
Click the icon for Hold Management. The Approval Absence Request Hold Summary displays.



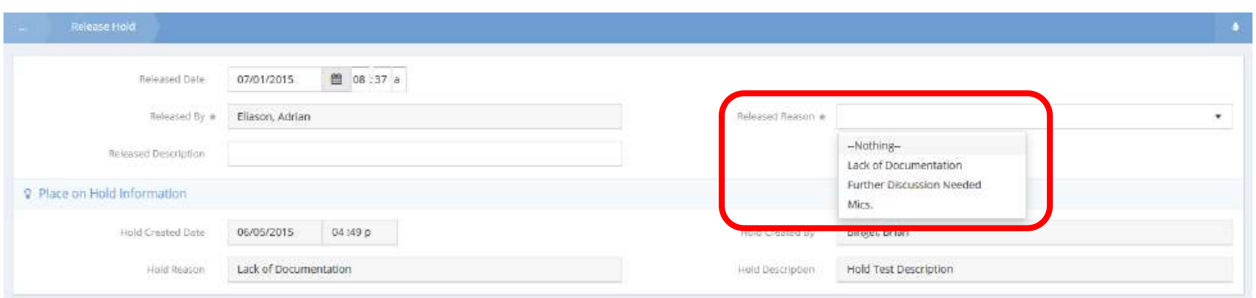
Select a Step from the drop-down list and click the Search button.



Results display in the spreadsheet below.



To release a hold, click the action gear icon associated with the desired absence and select Release Hold. The Release Hold form displays. Select a Released Reason from the drop-down list, enter a description if desired and click the Save button.

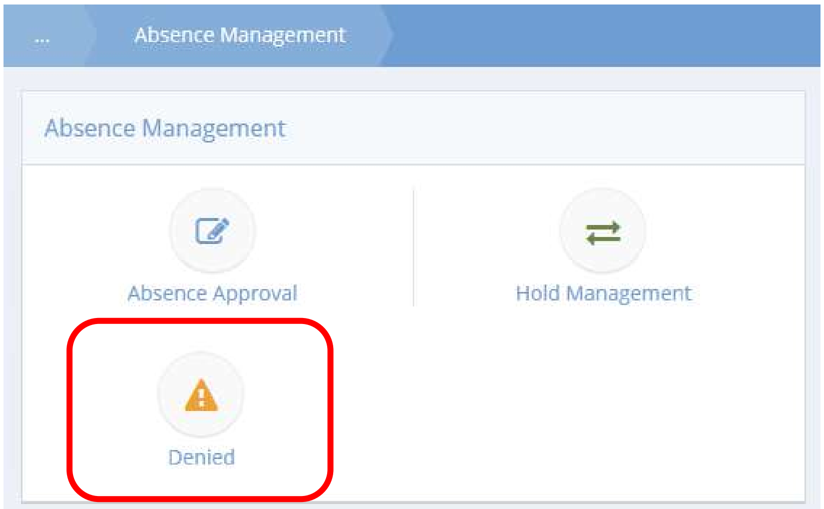


The hold has now been released.

Denied

Objective: View or edit absence requests that have been denied.

Navigation: Organization>Approvals>Absence

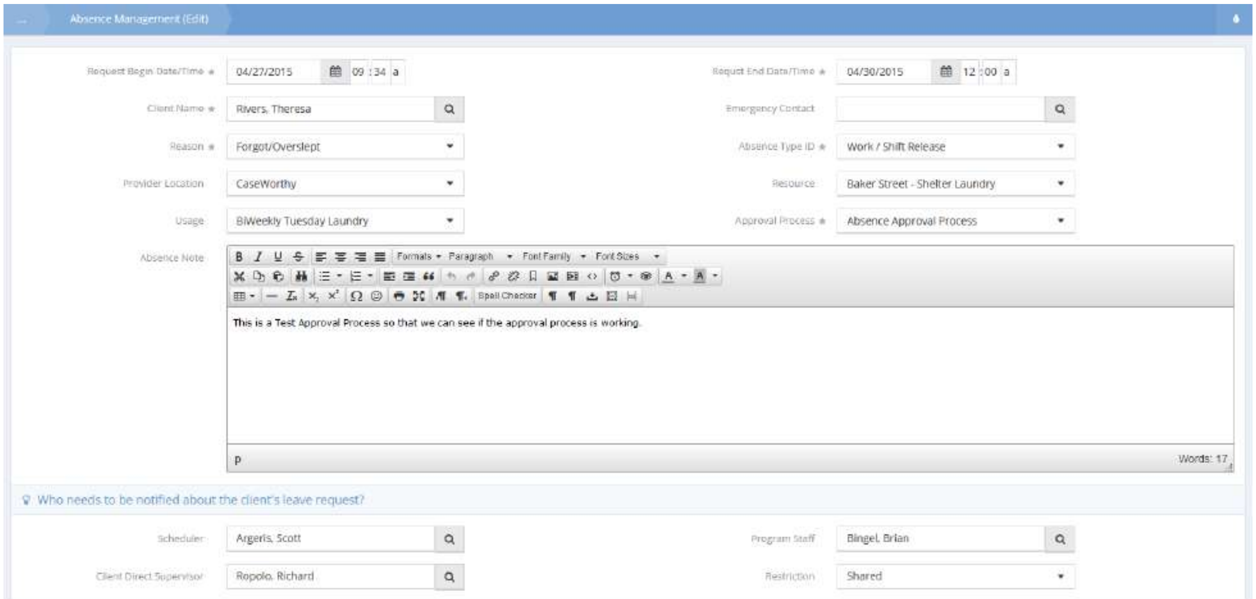


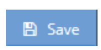
Click the icon for Denied. The Denied Absences form displays.

Denied Date	Denied Reason	Denied By	Client	Absence Request Begin - End Dates	AbsenceID
6/16/2015 5:28 PM	Not enough Staff to cover this absence Request	Bingel, Brian	Rivers, Theresa	4/27/2015 9:34 AM - 4/30/2015 12:00 AM	236
6/10/2015 1:57 PM	Test Deny Reason	Bingel, Brian	Brown, Jackson	6/5/2015 4:24 PM - 6/5/2015 8:00 PM	295

To view details or edit an absence, click the blue hyperlinked text.

The Absence Management (Edit) form displays.



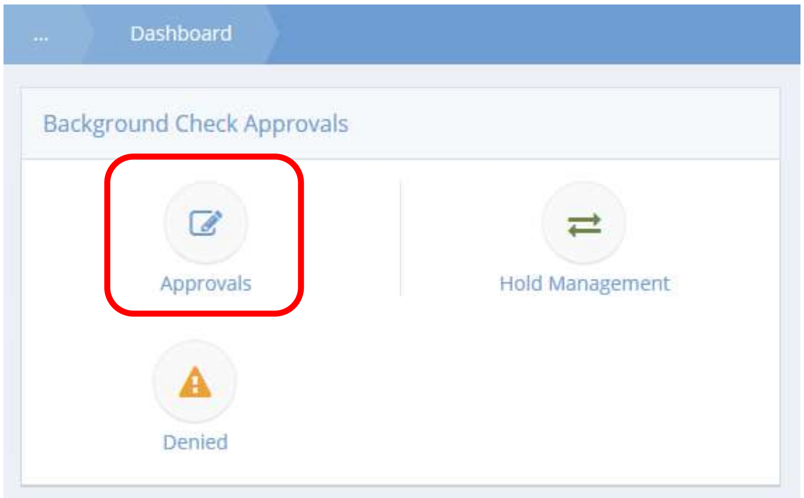
Make any desired changes and click 

when finished.

Background Checks

Approval Contact Background Check Hold Summary

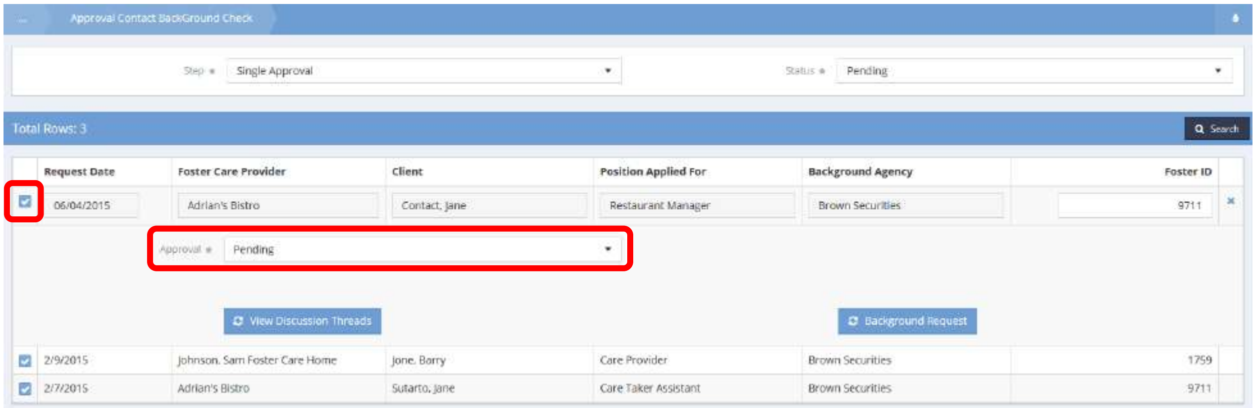
Objective: Manage approvals for contact background checks.



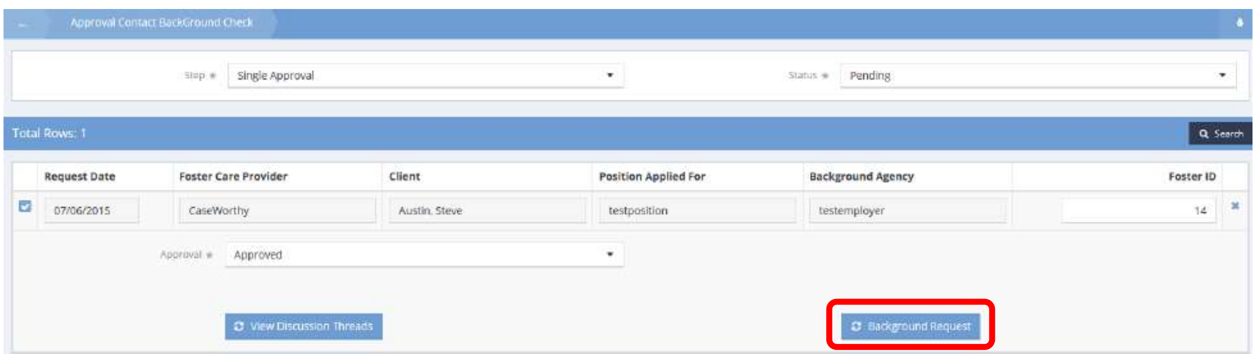
Click the icon for Approvals. The Approval Contact BackGround Check form displays.

Select a Step from the drop-down list and click the Search button.

Results display in the spreadsheet below.



To change the status of an item, click the blue checkbox and select a status from the drop-down list. Click the Save button when finished.



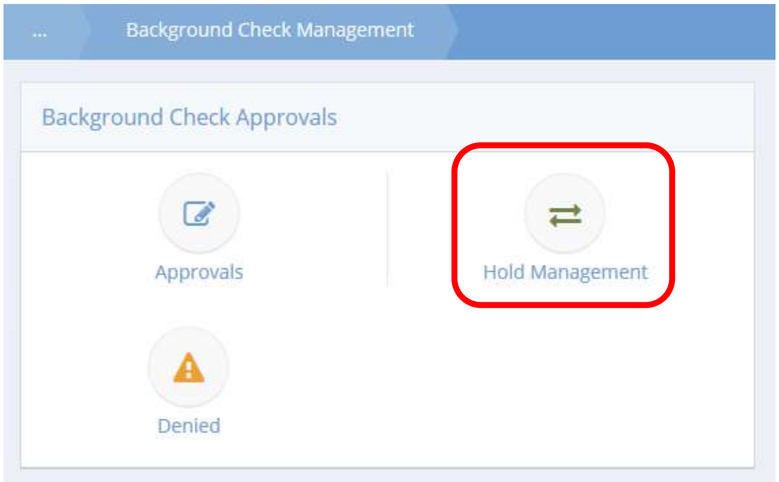
To view or edit a request, click the Background Request button.

Make any desired changes and click Save when finished.

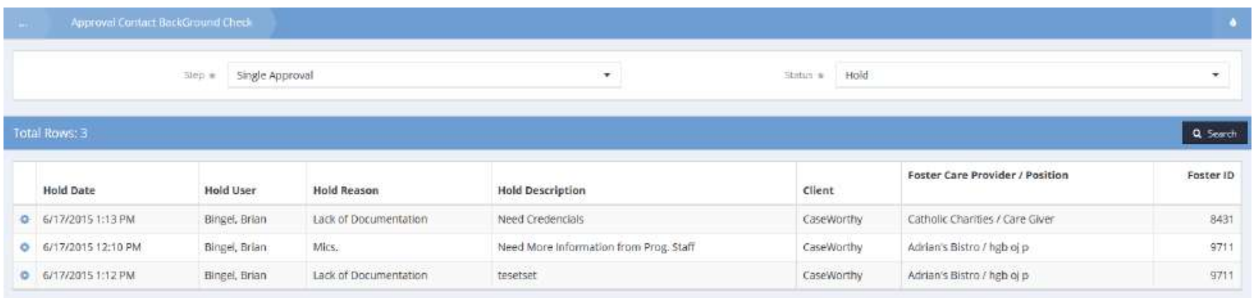
Approval Contact Background Check

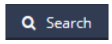
Objective: View and release holds for background checks.

Navigation: Organization>Approvals>Background Checks

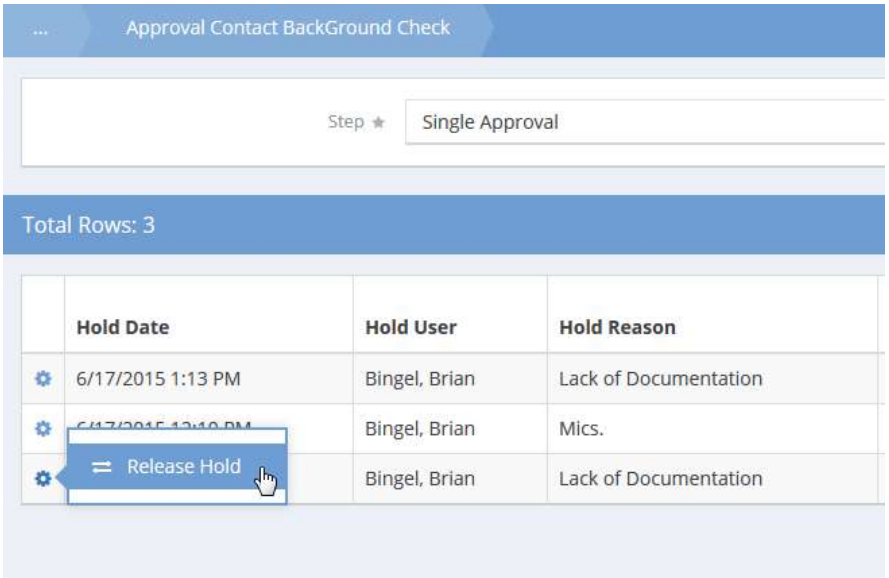


Click the icon for Hold Management. The Approval Contact Background Check form displays.



Use the drop-down lists and 

button to view a filtered list of existing holds.

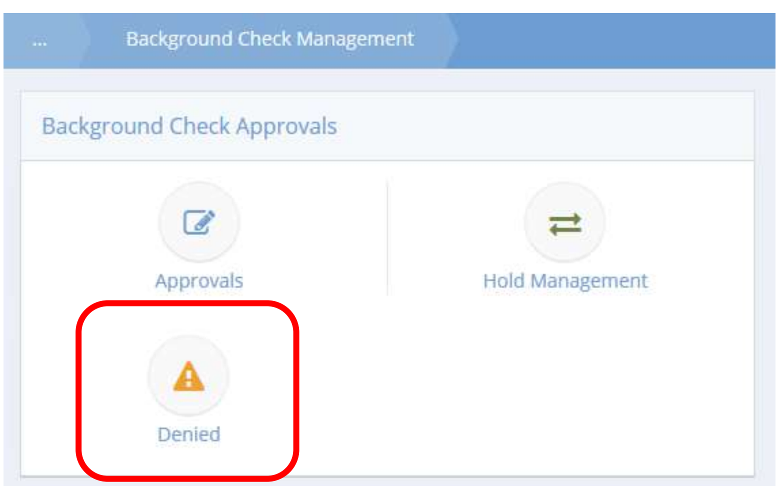


To release a hold, click the action gear icon associated with it and select Release Hold from the pop up menu that appears.

Background Check Denied

Objective: View denied background checks.

Navigation: Organization>Approvals>Background Checks



Click the icon for Denied. The Background Check Denied form displays a list of all denied background checks.


Background Check Denied

Total Rows: 1

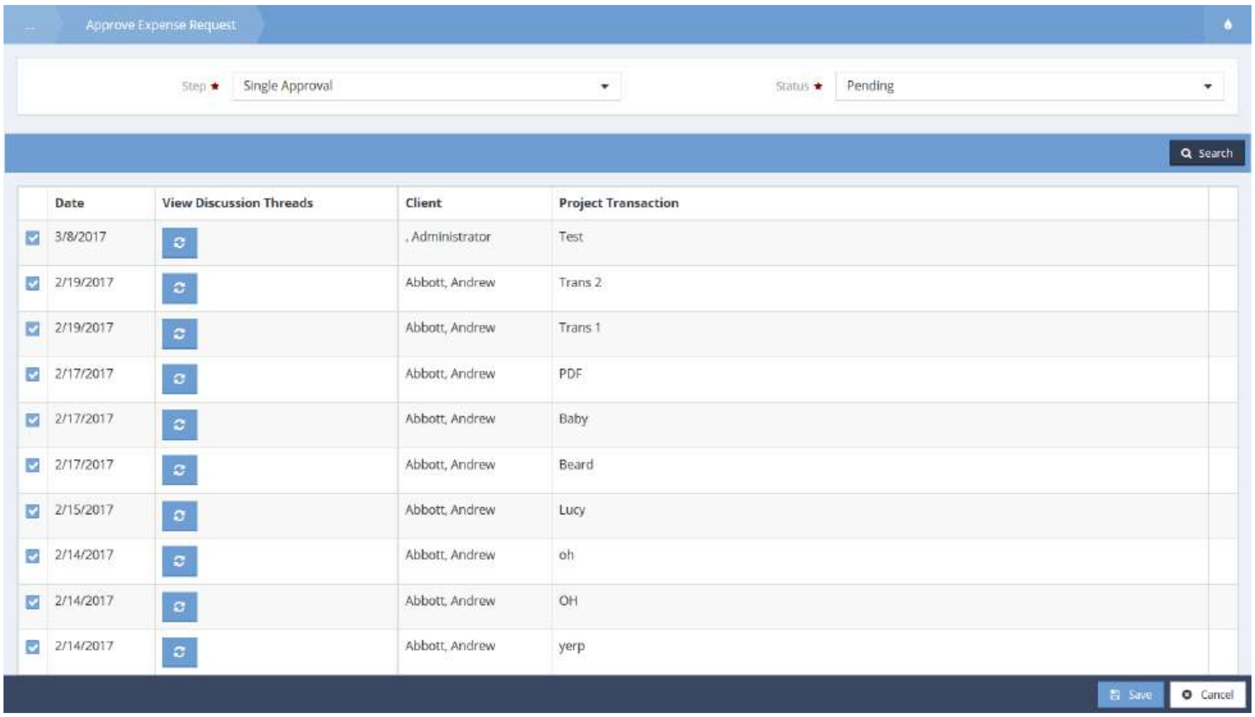
Denied Date	Denied By	Denied Reason	Provider	Provider Staff	Applied Date	Position Applied For
6/17/2015 2:52 PM	Bingel, Brian	Denied Test Reason	CCA	Test, OneMore	4/14/2015	testttt

Expense Reports

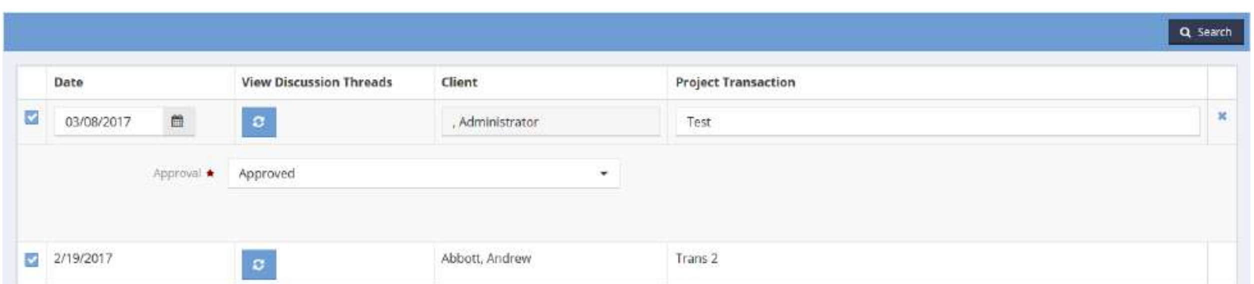
Objective: View and approve expense requests.

Navigation: Organization>Approvals>Expense Reports>Approved

The Approve Expense Request form displays.



Approve expense requests here. The status of Pending shows requests waiting to be approved. Expand the row to select an approval status for a specific request.



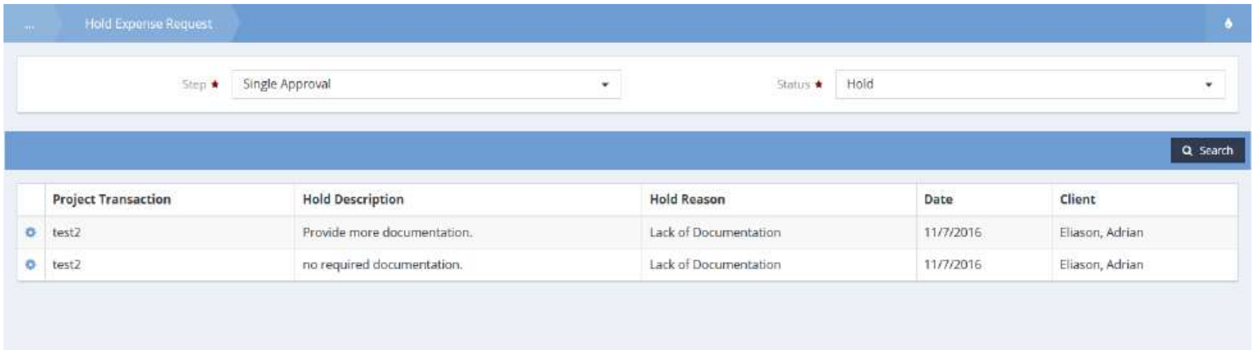
The Approval status defaults to Approved. Save and close.

On Hold

Objective: View and/or approve expense requests on hold.

Navigation: Organization>Approvals>Expense Reports>On Hold

The Hold Expense Request form displays.



Click the action gear icon associated with the desired expense report and select Release Hold to release the hold on the request. A new form displays asking for a Released Reason. Once this form has been saved the request goes back to a status of pending so it can be approved.

Denied

Objective: View denied expense requests.

Navigation: Organization>Approvals>Expense Reports>Denied

The Expense Denied form displays.

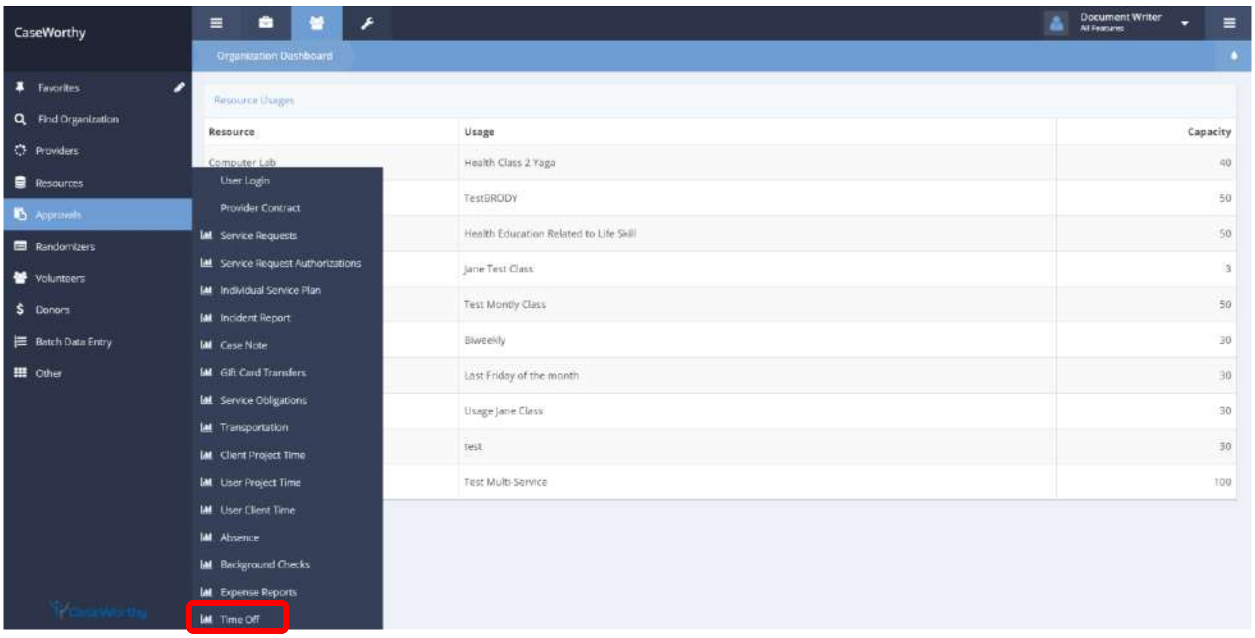
This is view only form, click the Done button when finished.

Time-Off Request

Approval Time Off Request

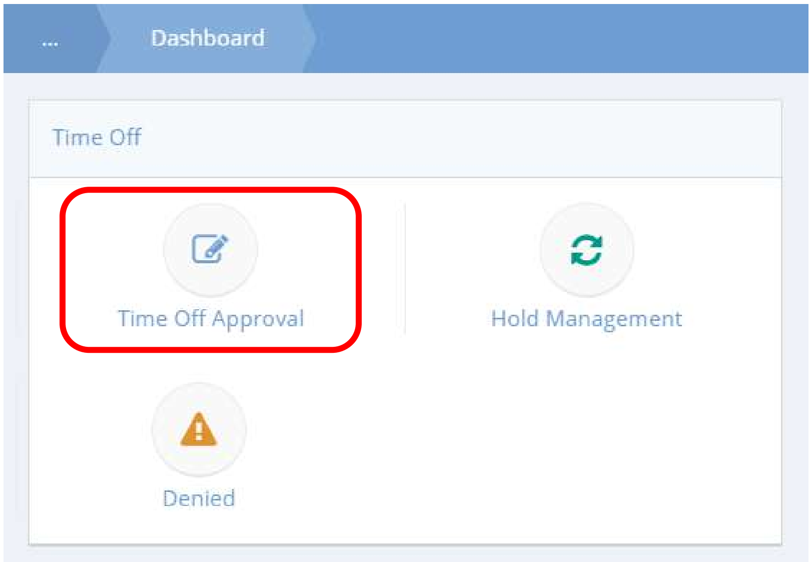
Objective: Manage time off requests.

Navigation: Organization>Approvals>Time Off>Time Off Approval

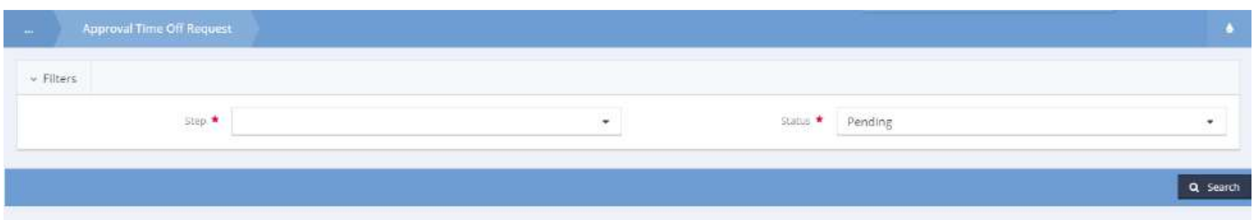


Under the Organization tab, select Approvals. A pop-up menu appears. Select Time Off.

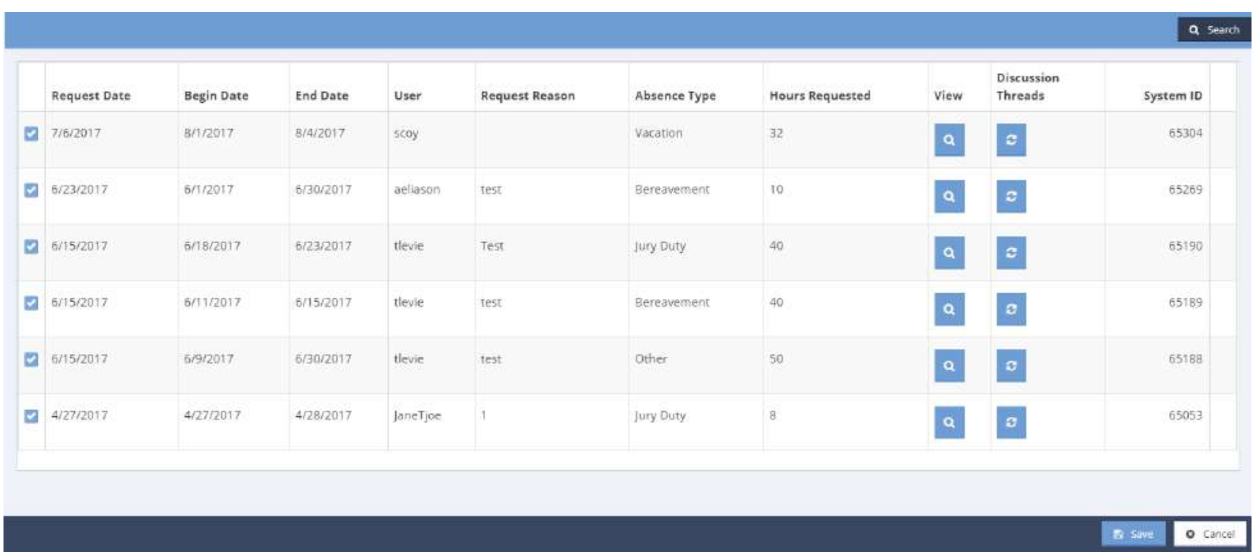
The Time Off dashboard appears.



Click the icon labeled Time Off Aprroval. The Approval Time Off Request form appears.

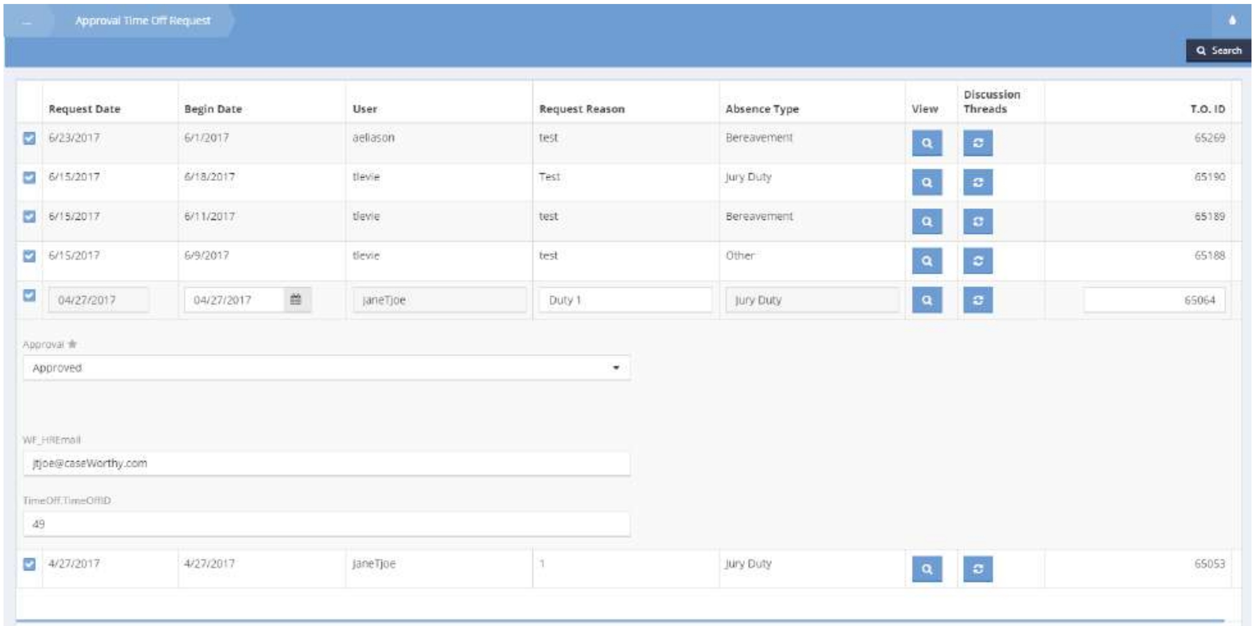


Select a Step and Status by clicking the drop-down menus. Click the Search button. A summary list appears.



	Request Date	Begin Date	End Date	User	Request Reason	Absence Type	Hours Requested	View	Discussion Threads	System ID
	7/6/2017	8/1/2017	8/4/2017	scoy		Vacation	32			65304
	6/23/2017	6/1/2017	6/30/2017	aeliason	test	Bereavement	10			65269
	6/15/2017	6/18/2017	6/23/2017	tlevie	Test	Jury Duty	40			65190
	6/15/2017	6/11/2017	6/15/2017	tlevie	test	Bereavement	40			65189
	6/15/2017	6/9/2017	6/30/2017	tlevie	test	Other	50			65188
	4/27/2017	4/27/2017	4/28/2017	JaneTjoe	1	Jury Duty	8			65053

To manage a pending request, click the icon next to a request date. The row expands.

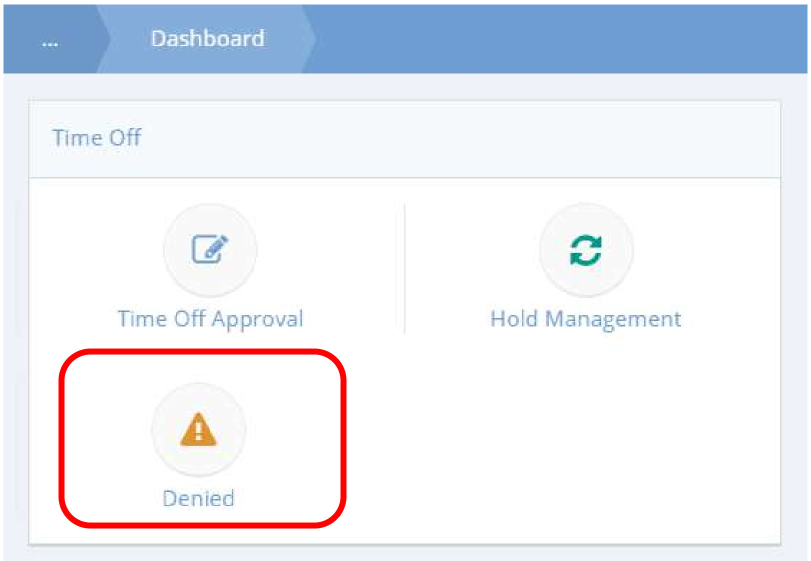


Select a desired outcome from the drop-down menu under Approval. Edit any other desired information. It is possible to manage multiple requests at once by clicking any icons desired. Click the Save button to finish and return to the Approval Time Off Request form. Once a request is assigned a label and saved, it will appear under the appropriately named Status list.

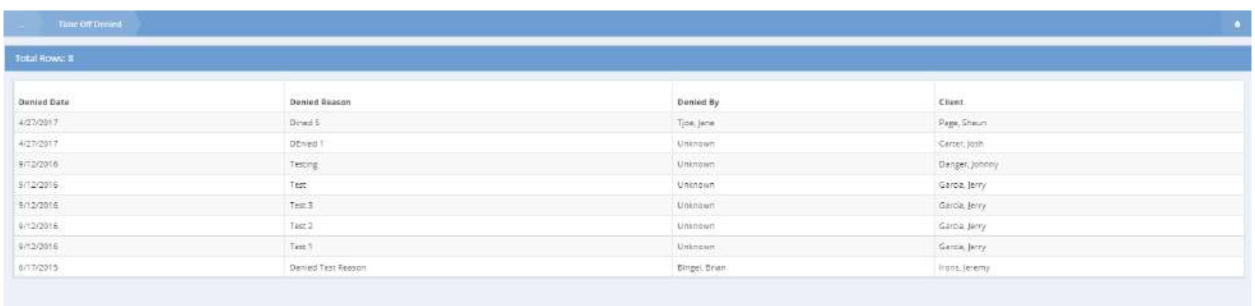
Time Off Denied

Objective: Display a summary of all Time Off Denied claims.

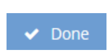
From the Time Off dashboard, click the icon labeled Denied.



The Time Off Denied form appears and displays a summary of information regarding each denied claim.



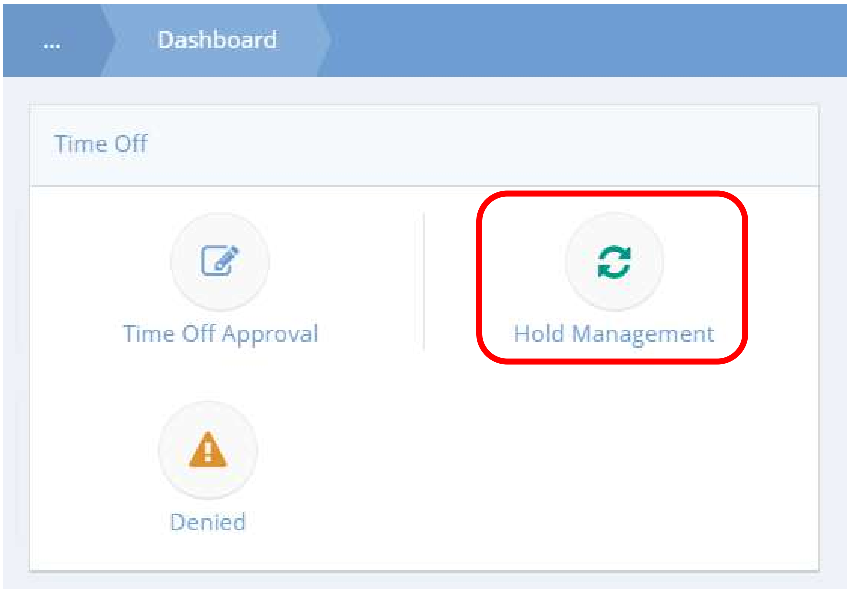
Denied Date	Denied Reason	Denied By	Client
4/27/2017	Dined 5	Tjoe, Jane	Page, Shaun
4/27/2017	DEnied 1	Unknown	Carter, Josh
9/12/2016	Testing	Unknown	Denger, Johnny
9/12/2016	Test	Unknown	Garcia, Jerry
9/12/2016	Test 3	Unknown	Garcia, Jerry
9/12/2016	Test 2	Unknown	Garcia, Jerry
9/12/2016	Test 1	Unknown	Garcia, Jerry
6/17/2015	Denied Test Reason	Bingel, Brian	Irons, Jeremy

To return to the Time Off Dashboard, click the  button.

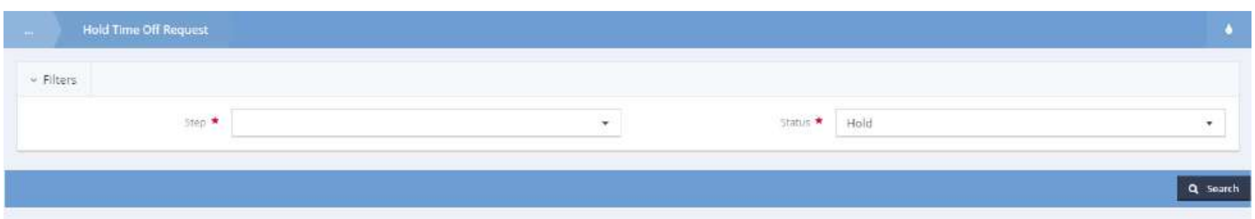
Hold Time Off Request

Objective: Manage holds placed on time off requests.

From the Time Off dashboard, click the icon labeled Hold Management.

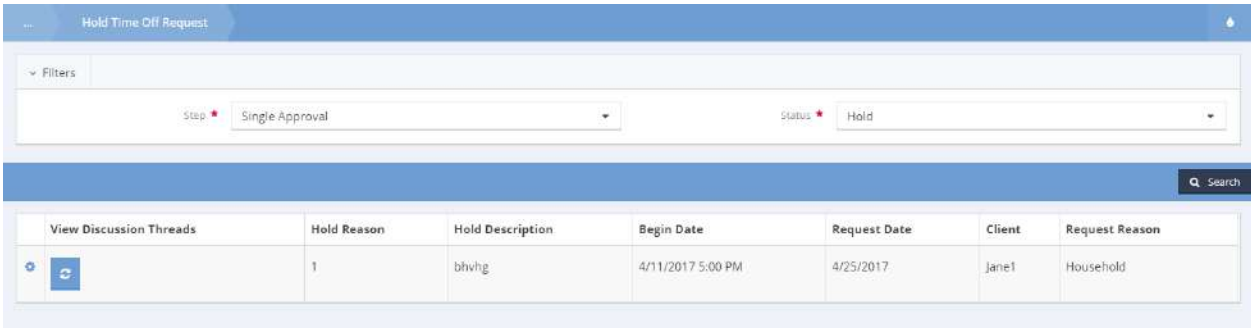


The Hold Time Off Request form appears.

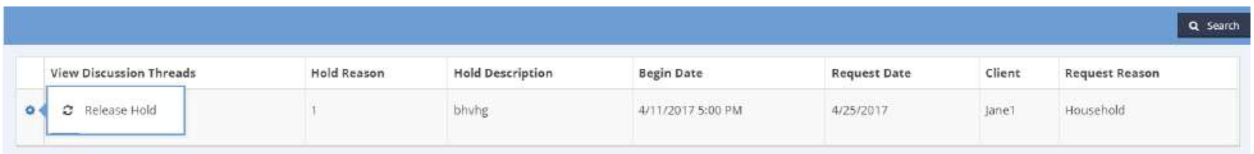


Select a Step by clicking the drop-down icon. Click the Search button.

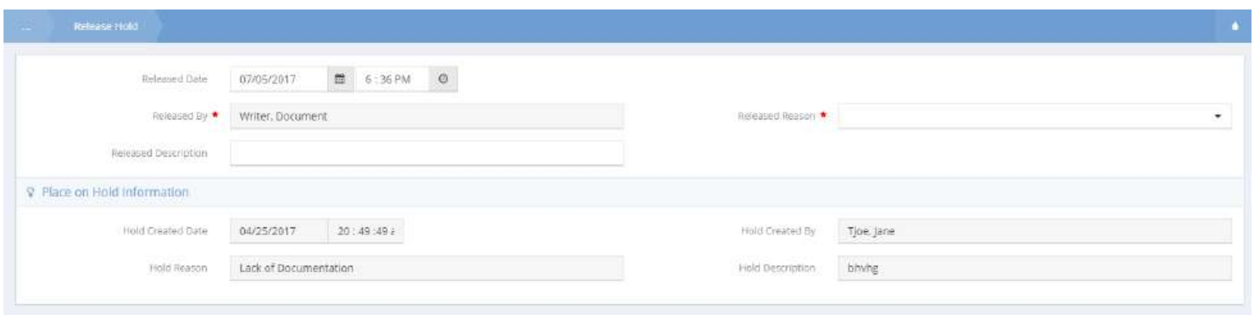
A summary list appears.



Click the action gear icon next to the desired time off request. A pop-up menu appears.



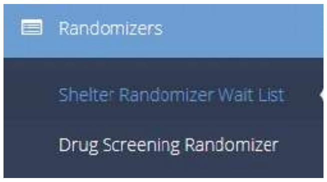
Click Release Hold to view the Release Hold form.



Enter in any necessary information and click the Save button to save and return to the Hold Time Off Request form.

Randomizers

Shelter Randomizer Wait List



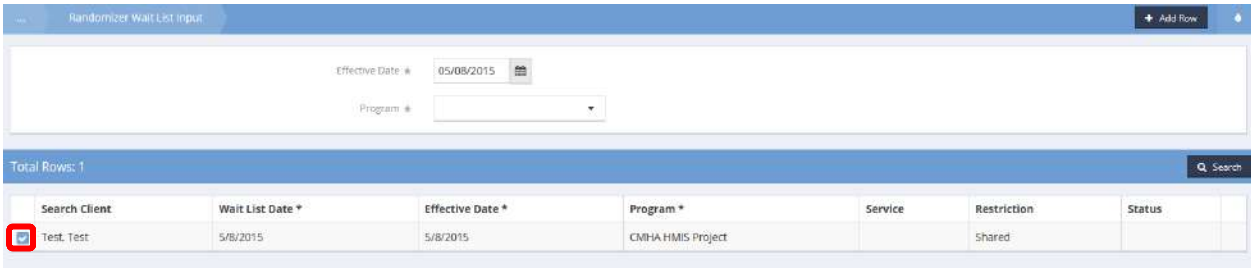
The Wait list can be filtered using the search bar. Enter a name or date range and click the Search button. To create a new randomizer, click the + Add New button. The Randomizer Wait List Input form displays.

Click the + Add Row button. A new row appears.

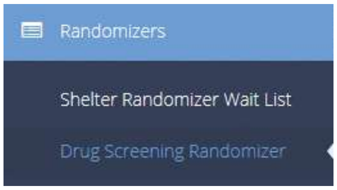
Select a client using the magnifying glass icon lookup. Select dates, a program, and a service if desired. Click the Save button. The Randomizer Wait List Input form reappears.

The new wait list item has been added.

To edit an existing click the blue checkbox icon and make any desired changes. Click the Save button when finished.



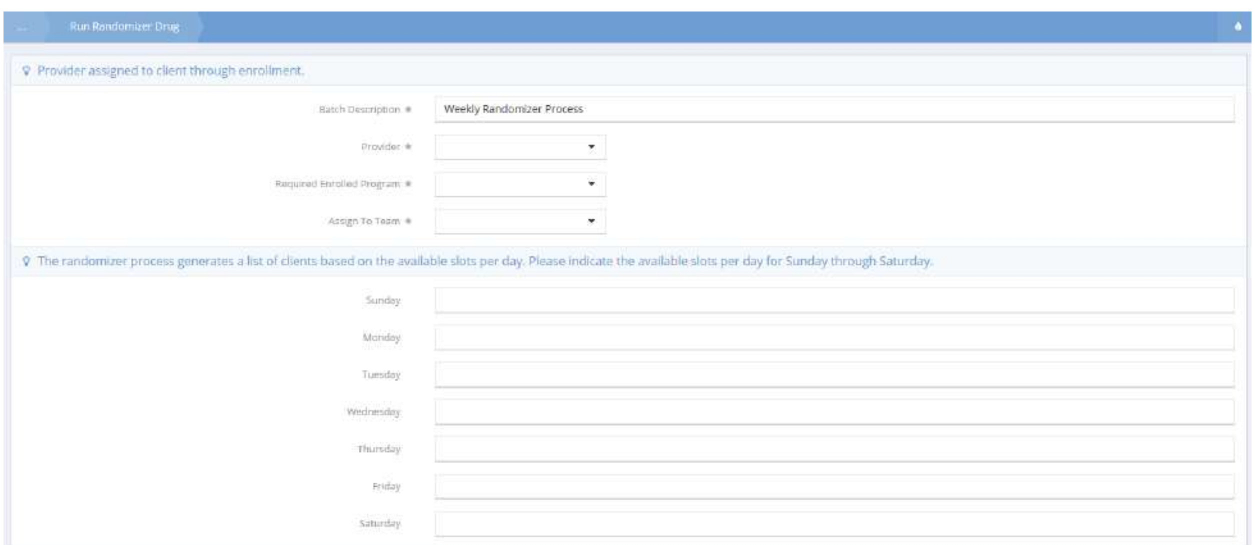
Drug Screening Randomizer



The Shelter Randomizer Wait list requires extensive System Administrator set-up and user training. Please contact a CaseWorthy™ project manager for information and training on using this functionality.

To create a new drug screening randomizer, click the **Add New** button. The Run Randomizer Drug form displays.

Select a provider, program, and team from the drop-down lists. Indicate the available slots for each day. Click the **Save** button when finished.



The new randomizer is added.

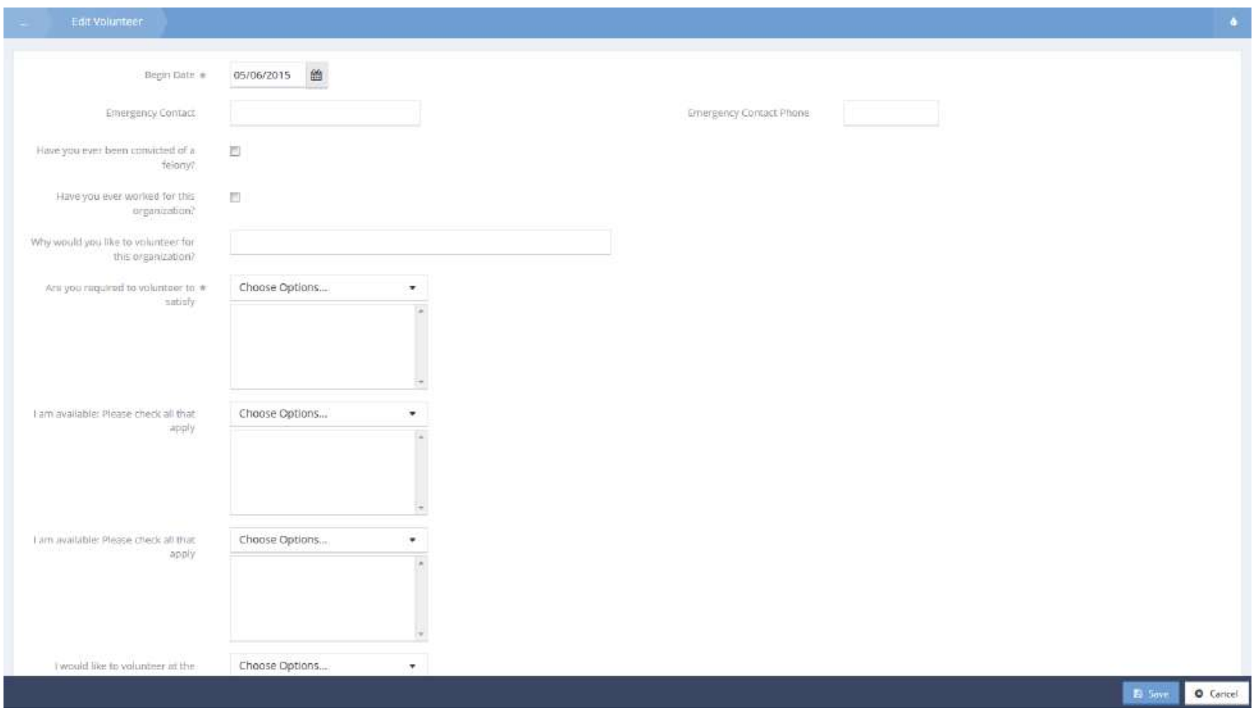
To edit, run, or view the randomizer, click the action gear  and click the relevant menu item.

Volunteers

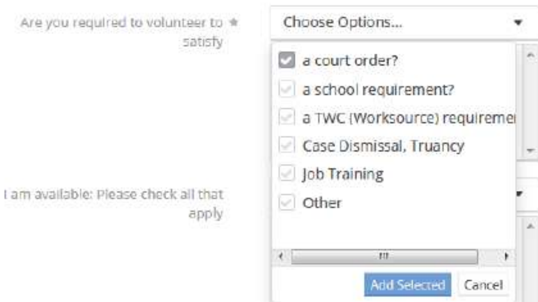
Volunteer Application

The Volunteer Intake Application Summary is used to view and manage volunteer applications. To create a new application, click the Add New button.

The Edit Volunteer form displays.



Select a volunteer reason from the "Are you required to volunteer to satisfy" drop-down list by clicking the checkbox icon and clicking the Add Selected button.



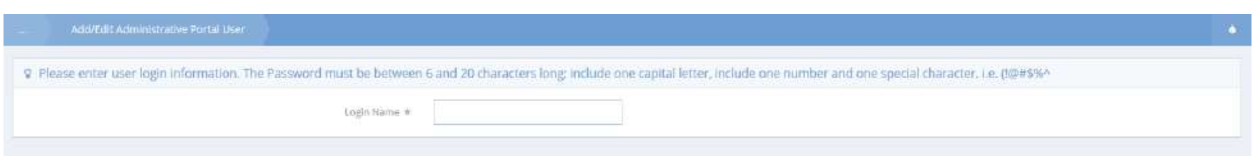
Fill out all other available info and click the Save button.

To edit an existing application, click the action gear and click Edit. Make any changes and click the Save button when finished.

All Volunteers

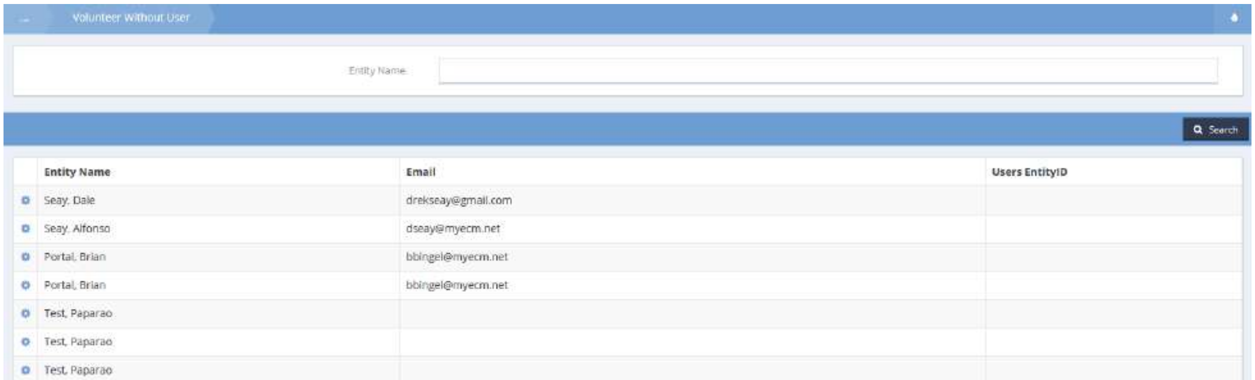
The Portal Users Summary form displays a list of portal users. The list can be filtered by typing all or part of a name in the Entity Name field and clicking the Search button. To add a user, click the Add User button. The Add/Edit Administrative Portal User form displays.

Enter a login name and click the Save button.

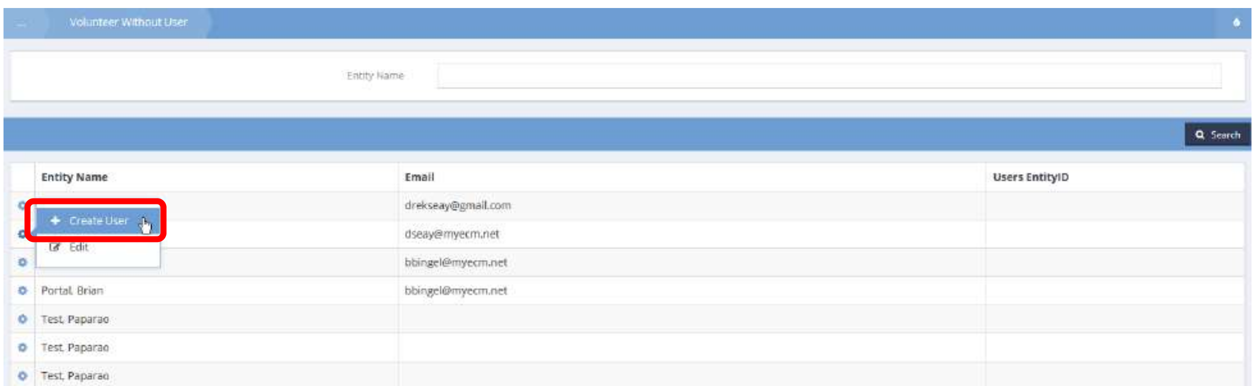


Volunteers Without User IDs

Objective: View a list of volunteers without user IDs.



To assign a user ID, click the action gear  icon associated with the desired volunteer and select Create User from the pop up menu that appears.



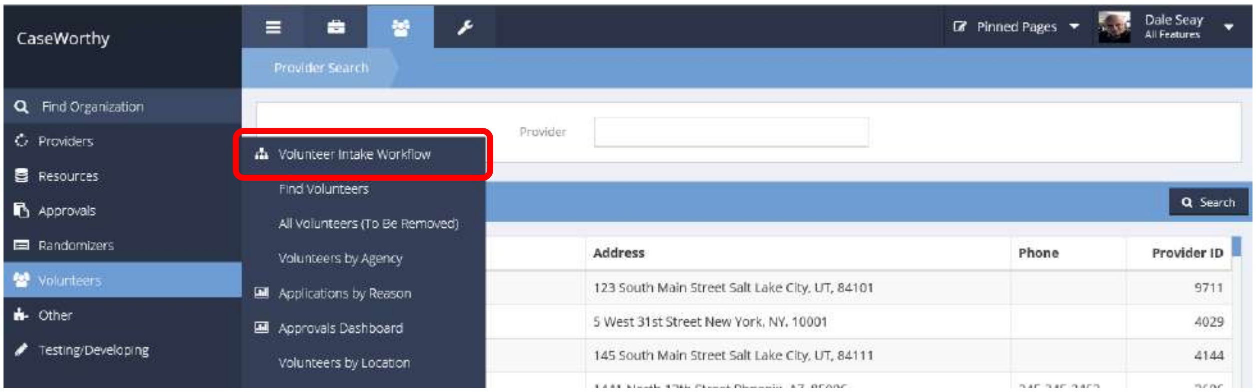
The Add/Edit Administrative Portal User form displays.

Enter a login name and click the 

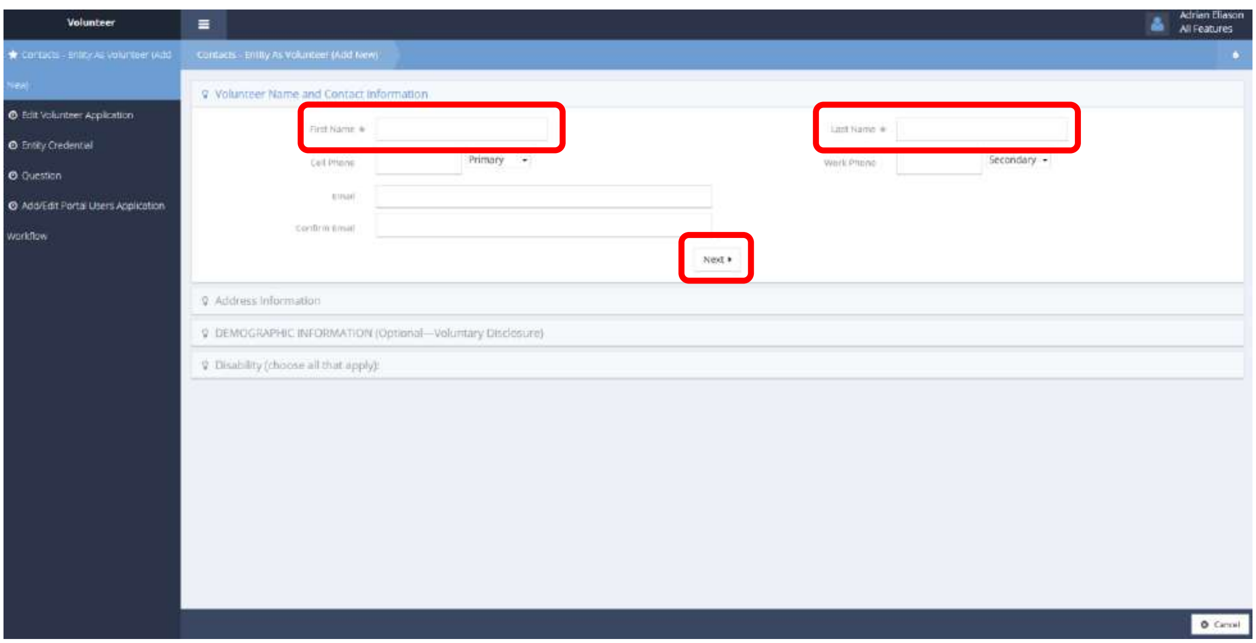
button.

Volunteer Intake Workflow

Objective: Add or edit portal users within the volunteer application workflow.

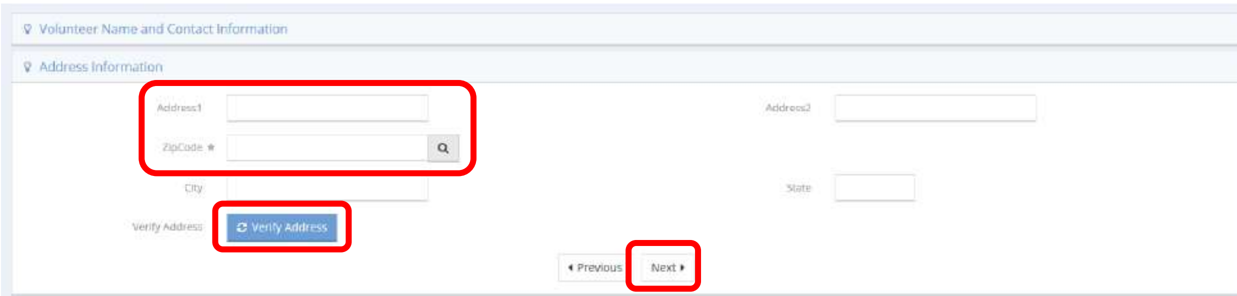


Select Volunteer Intake Workflow from the Volunteers menu. The first step of the workflow, Volunteer Name and Contact Information, opens.

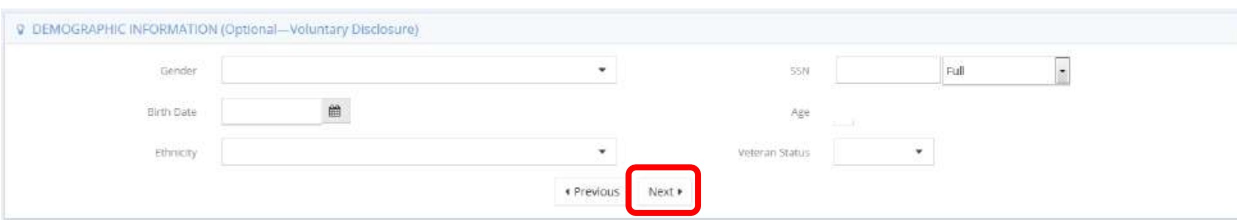


Enter a first and last name for the volunteer, along with any other available information. Click the button.

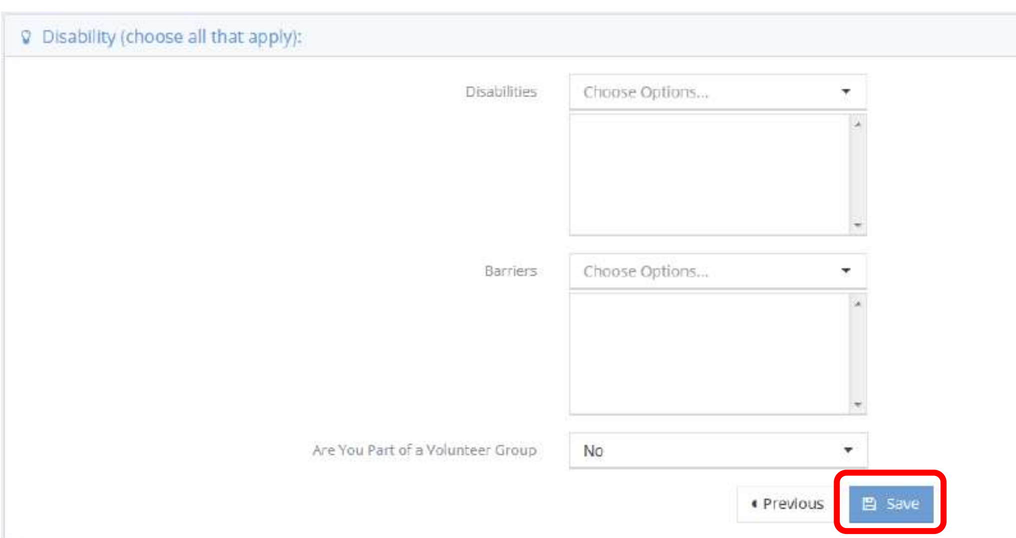
The next step of the Contacts – Entity As Volunteer (Add New) form, Address Information, displays.



Enter an address and zip code and click the Verify Address button. If the location displayed is correct click it to proceed. Click the Next button. The Demographic Information area displays.

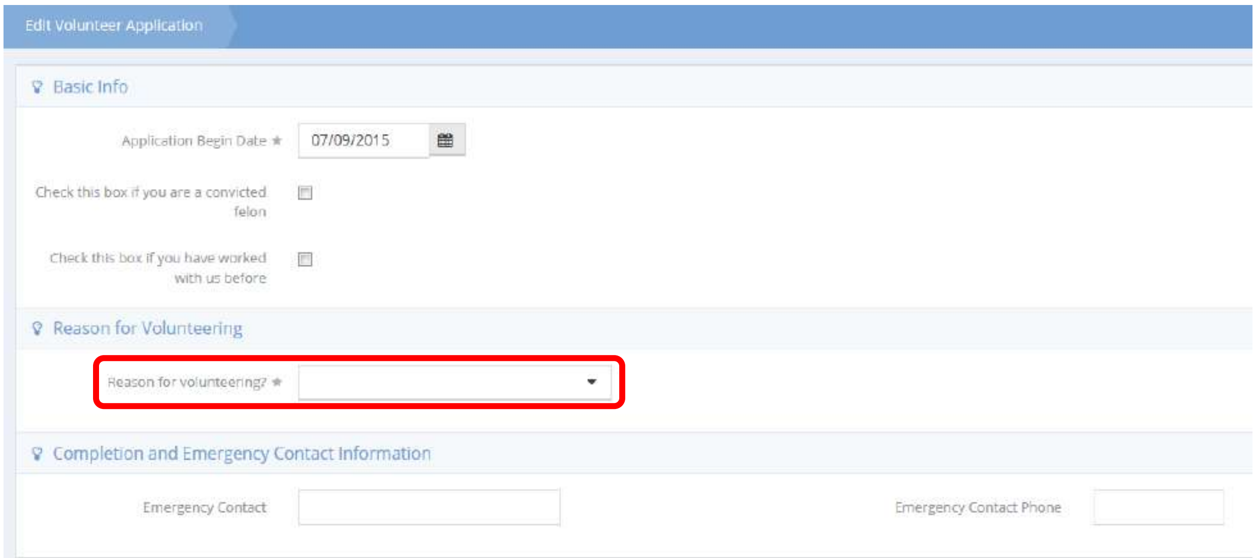


Optionally, enter any available demographic info. Click the Next button. The Disability area displays.



Enter any disability information or barriers using the drop-down lists. Click the button when finished.

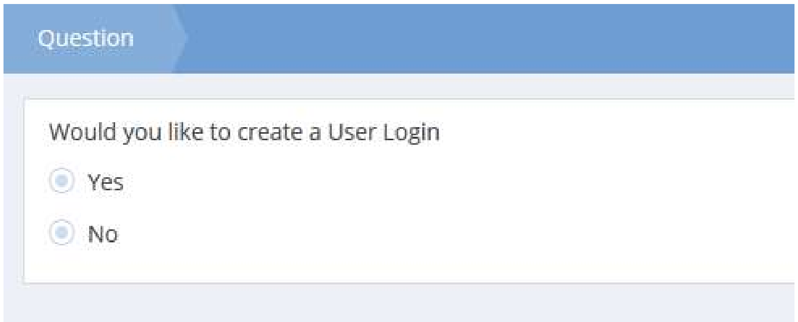
The next step in the workflow, Edit Volunteer Application, displays.



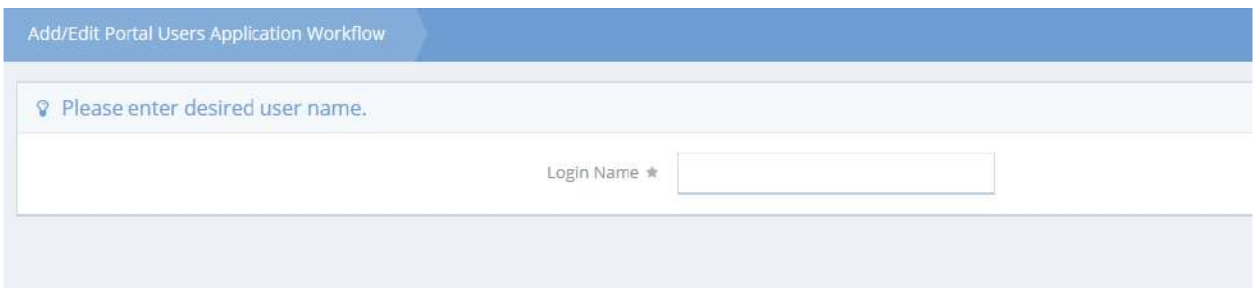
Select a reason for volunteering using the drop-down list and enter any further required information in the fields that appear. Enter any other available information in the remaining fields. Click the button when finished. The Entity Credential form displays.

Add any relevant credentials using the clear checkbox icon or click Add Row to make a new entry. Click Save when finished.

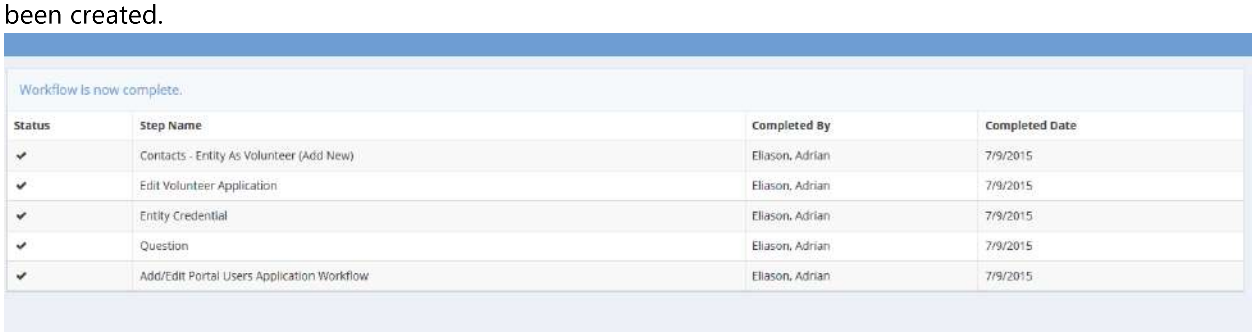
The next step of the workflow, the question about creating a user login, appears.



If creating a user login is desired, click the radio button for Yes. Click Save to proceed. The form used to enter the desired user login name displays.



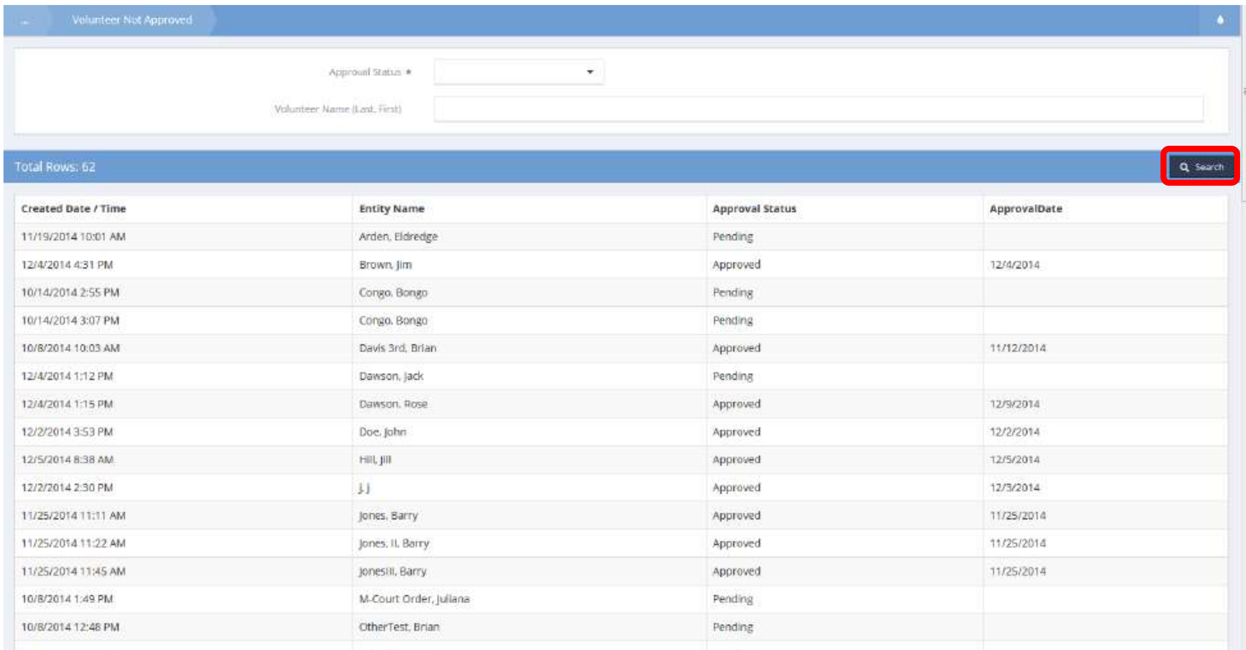
Enter the desired user name and click Save when finished. The workflow is complete and the user has been created.



Volunteers Not Yet Approved

Objective: Display list of volunteers based on approval status.

On the Volunteer Not Approved form, enter the desired volunteer name and select a value from the drop-down box for Approval Status to filter the list displayed. Click Search when parameters are chosen. The list appears on the lower part of the form.


Volunteer Not Approved

Approval Status *

Volunteer Name (Last, First)

Total Rows: 62

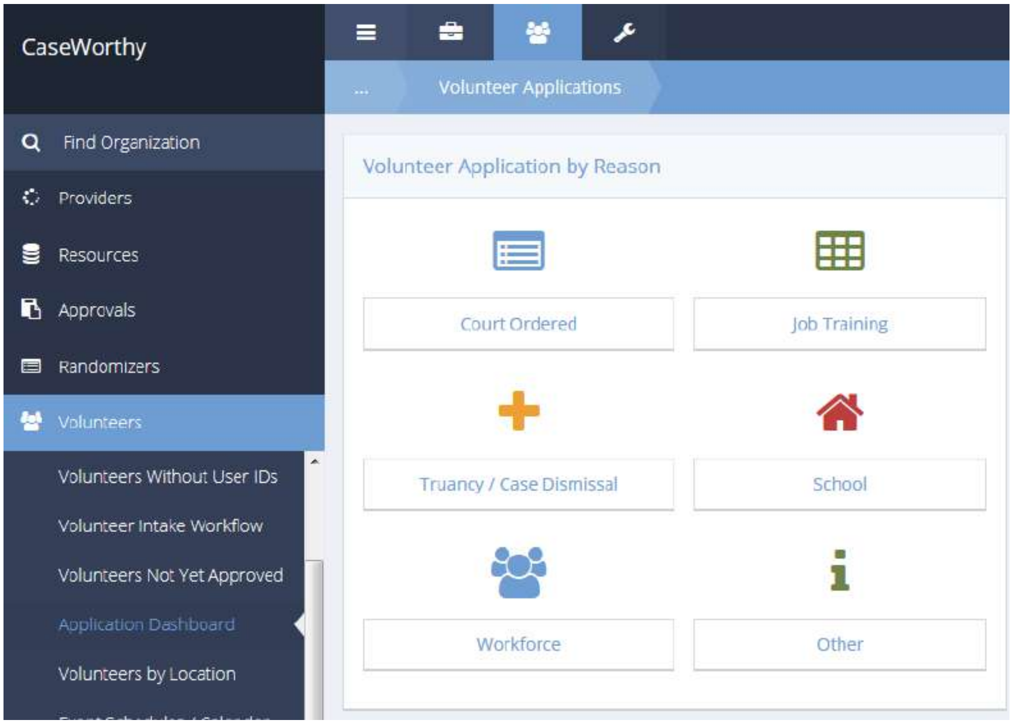
Search

Created Date / Time	Entity Name	Approval Status	ApprovalDate
11/19/2014 10:01 AM	Arden, Eldredge	Pending	
12/4/2014 4:31 PM	Brown, Jim	Approved	12/4/2014
10/14/2014 2:55 PM	Congo, Bongo	Pending	
10/14/2014 3:07 PM	Congo, Bongo	Pending	
10/8/2014 10:03 AM	Davis 3rd, Brian	Approved	11/12/2014
12/4/2014 1:12 PM	Dawson, Jack	Pending	
12/4/2014 1:15 PM	Dawson, Rose	Approved	12/9/2014
12/2/2014 3:53 PM	Doe, John	Approved	12/2/2014
12/5/2014 8:38 AM	Hill, Jill	Approved	12/5/2014
12/2/2014 2:30 PM	J, J	Approved	12/3/2014
11/25/2014 11:11 AM	Jones, Barry	Approved	11/25/2014
11/25/2014 11:22 AM	Jones, II, Barry	Approved	11/25/2014
11/25/2014 11:45 AM	JonesIII, Barry	Approved	11/25/2014
10/8/2014 1:49 PM	M-Court Order, Juliana	Pending	
10/8/2014 12:48 PM	OtherTest, Brian	Pending	
10/8/2014 12:36 PM	SchoolTest, Brian	Pending	

Application Dashboard

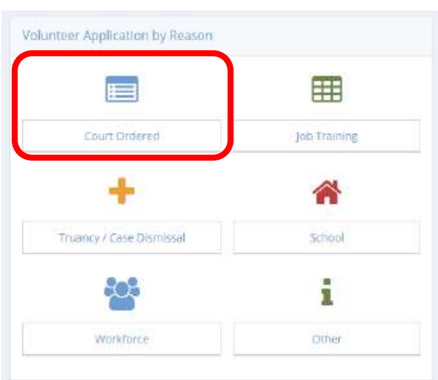
Application Dashboard

Objective: Edit volunteer applications and access volunteers by reason categories.

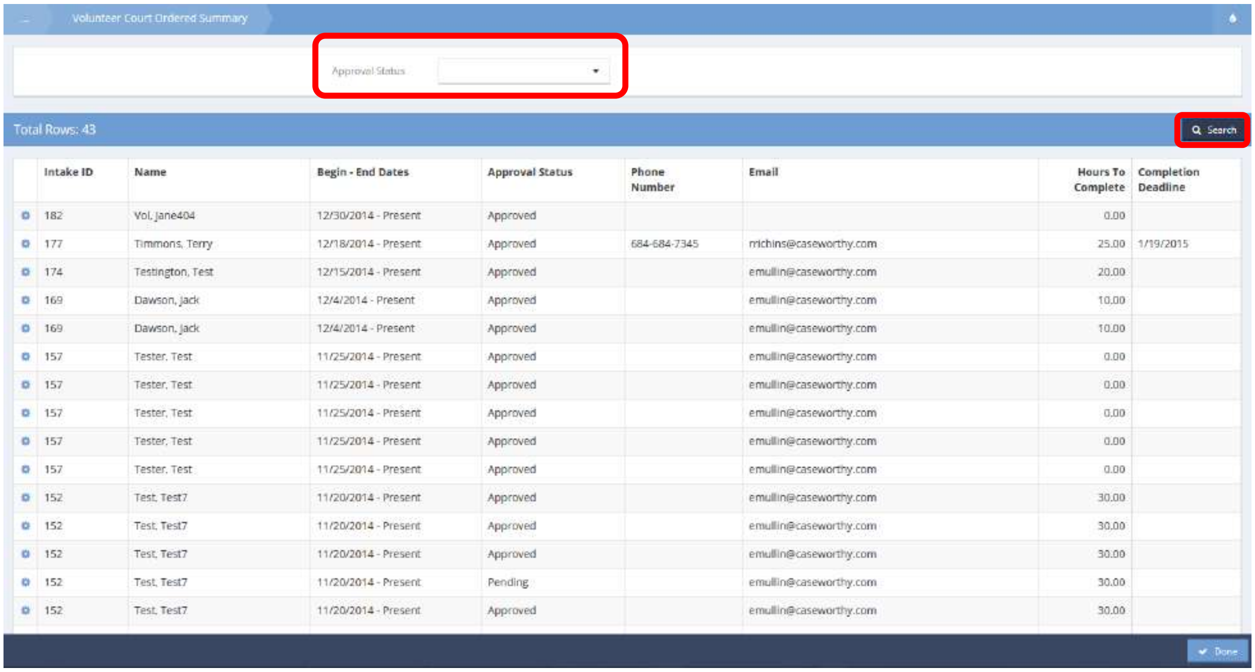


Volunteer Court Ordered Summary

Click on the Court Ordered icon.

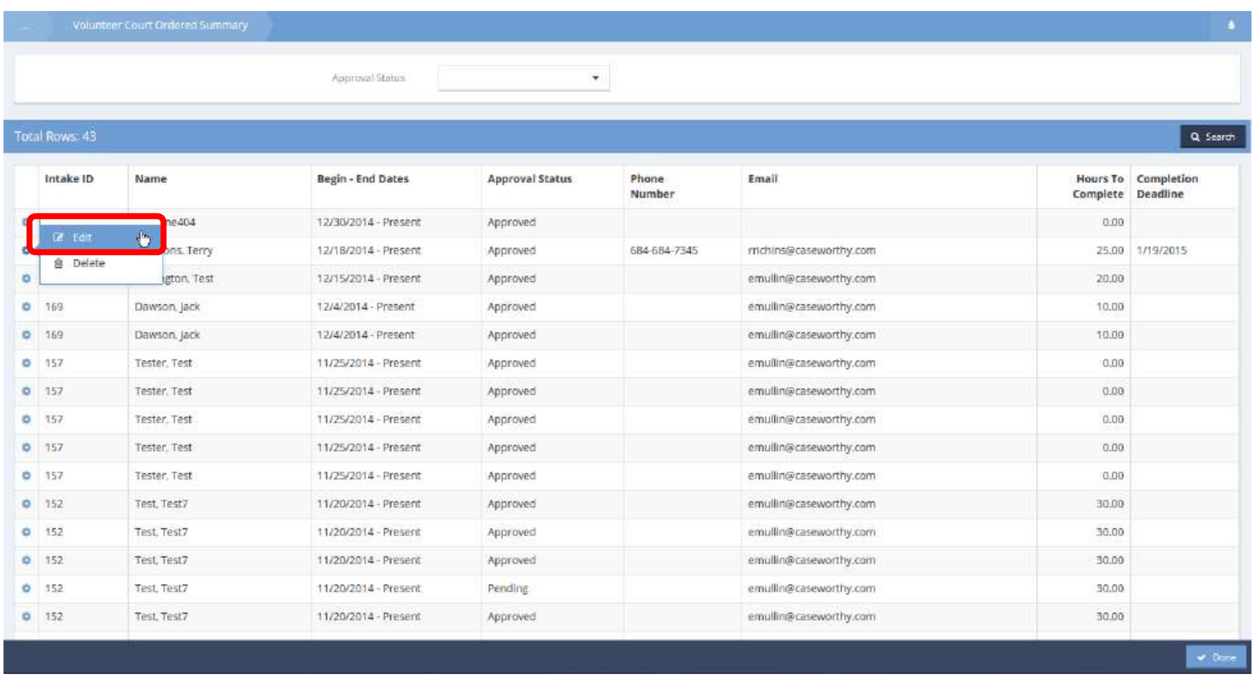


The Volunteer Court Ordered Summary form displays.



Intake ID	Name	Begin - End Dates	Approval Status	Phone Number	Email	Hours To Complete	Completion Deadline
182	Vol, Jane404	12/30/2014 - Present	Approved			0.00	
177	Timmons, Terry	12/18/2014 - Present	Approved	684-684-7345	rrichins@caseworthy.com	25.00	1/19/2015
174	Testington, Test	12/15/2014 - Present	Approved		emullin@caseworthy.com	20.00	
169	Dawson, Jack	12/4/2014 - Present	Approved		emullin@caseworthy.com	10.00	
169	Dawson, Jack	12/4/2014 - Present	Approved		emullin@caseworthy.com	10.00	
157	Tester, Test	11/25/2014 - Present	Approved		emullin@caseworthy.com	0.00	
157	Tester, Test	11/25/2014 - Present	Approved		emullin@caseworthy.com	0.00	
157	Tester, Test	11/25/2014 - Present	Approved		emullin@caseworthy.com	0.00	
157	Tester, Test	11/25/2014 - Present	Approved		emullin@caseworthy.com	0.00	
157	Tester, Test	11/25/2014 - Present	Approved		emullin@caseworthy.com	0.00	
152	Test, Test7	11/20/2014 - Present	Approved		emullin@caseworthy.com	30.00	
152	Test, Test7	11/20/2014 - Present	Approved		emullin@caseworthy.com	30.00	
152	Test, Test7	11/20/2014 - Present	Approved		emullin@caseworthy.com	30.00	
152	Test, Test7	11/20/2014 - Present	Pending		emullin@caseworthy.com	30.00	
152	Test, Test7	11/20/2014 - Present	Approved		emullin@caseworthy.com	30.00	

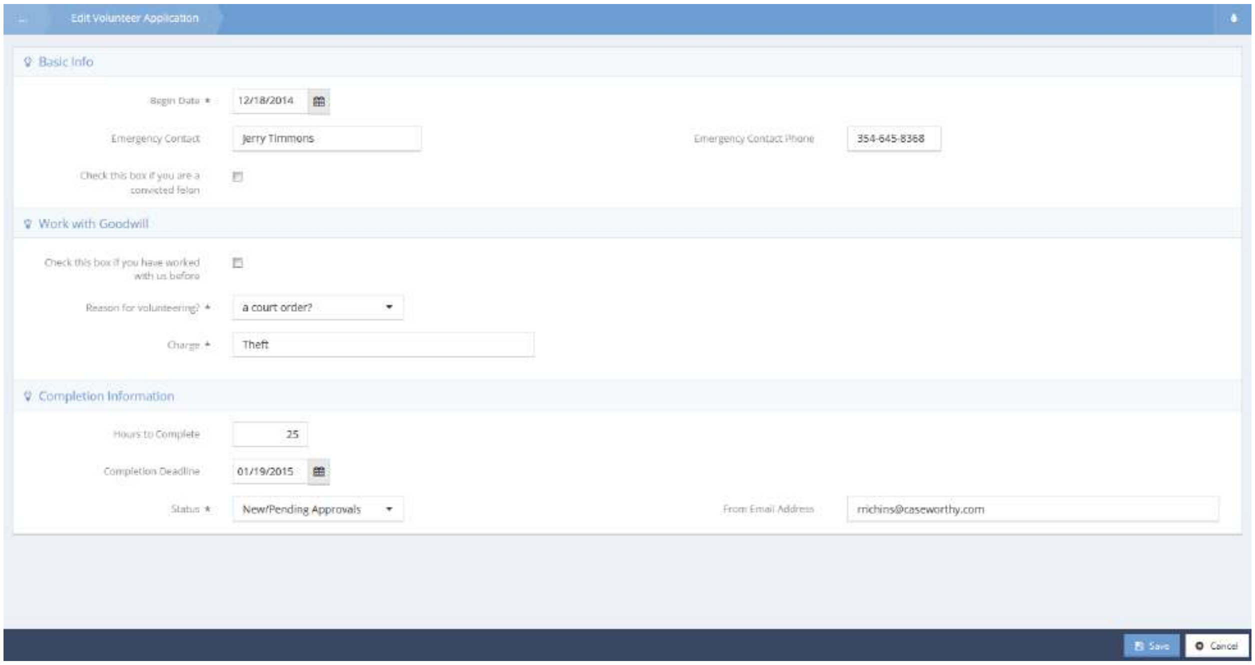
To filter by approval status, choose a status from the drop-down list and click the Search button. The list changes to reflect the selected approval status.



Intake ID	Name	Begin - End Dates	Approval Status	Phone Number	Email	Hours To Complete	Completion Deadline
	ne404	12/30/2014 - Present	Approved			0.00	
	ons, Terry	12/18/2014 - Present	Approved	684-684-7345	rrichins@caseworthy.com	25.00	1/19/2015
	gton, Test	12/15/2014 - Present	Approved		emullin@caseworthy.com	20.00	
169	Dawson, Jack	12/4/2014 - Present	Approved		emullin@caseworthy.com	10.00	
169	Dawson, Jack	12/4/2014 - Present	Approved		emullin@caseworthy.com	10.00	
157	Tester, Test	11/25/2014 - Present	Approved		emullin@caseworthy.com	0.00	
157	Tester, Test	11/25/2014 - Present	Approved		emullin@caseworthy.com	0.00	
157	Tester, Test	11/25/2014 - Present	Approved		emullin@caseworthy.com	0.00	
157	Tester, Test	11/25/2014 - Present	Approved		emullin@caseworthy.com	0.00	
157	Tester, Test	11/25/2014 - Present	Approved		emullin@caseworthy.com	0.00	
152	Test, Test7	11/20/2014 - Present	Approved		emullin@caseworthy.com	30.00	
152	Test, Test7	11/20/2014 - Present	Approved		emullin@caseworthy.com	30.00	
152	Test, Test7	11/20/2014 - Present	Approved		emullin@caseworthy.com	30.00	
152	Test, Test7	11/20/2014 - Present	Pending		emullin@caseworthy.com	30.00	
152	Test, Test7	11/20/2014 - Present	Approved		emullin@caseworthy.com	30.00	

To edit a volunteer, click the action gear icon associated with it and select Edit from the pop up menu that appears.

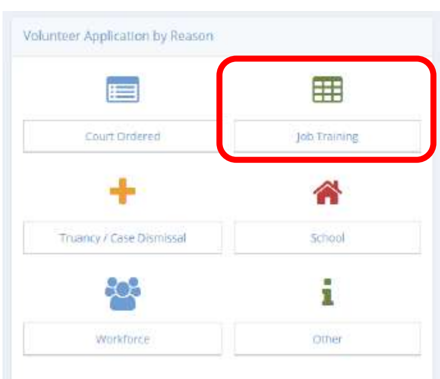
The Edit Volunteer Application form displays.



Make any necessary changes and click Save when finished.

Volunteer Job Training Summary

Click the Job Training icon.



The Volunteer Job Training Summary form displays.


Volunteer Job Training Summary

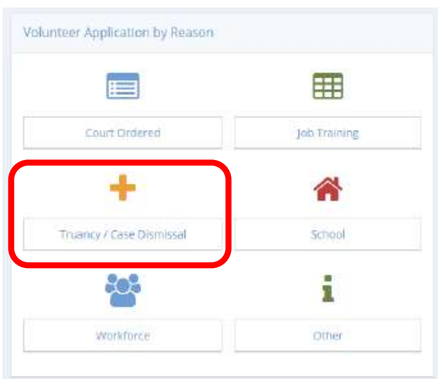
Search

Begin Date	Reason	Status	Name	Phone Number	Email	Job Coach
10/8/2014	Job Training	Open	Davis 3rd, Brian		bbingel@CaseWorthy.com	Brian
10/8/2014	Job Training	Open	Vol, Jane		jtjoe@caseWorthy.com	Brian
10/6/2014	Job Training	Open	Vol141, Jane		jtjoe@CaseWorthy.com	tseay

Edit an application using the same steps as shown for the Court Ordered Summary form.

Volunteer Court Dismissal/Truancy Summary

Click the Truancy / Case Dismissal icon.



The Volunteer Court Dismissal/Truancy Summary form displays.


Volunteer Court Dismissal/Truancy Summary

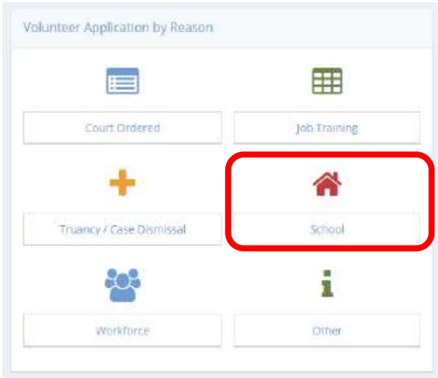
Search

Begin Date	Reason	Status	Name	Phone Number	Email	Hours To Complete	Completion Deadline	Letter Required Upon Completion
12/5/2014	Case Dismissal, Truancy	Open	Hill, Jill		emullin@caseworthy.com	10		
12/2/2014	Case Dismissal, Truancy	Open	Doe, John		emullin@caseworthy.com	10		Yes
11/25/2014	Case Dismissal, Truancy	Open	JonesIII, Barry		bbingel@CaseWorthy.com	30	12/31/2014	Yes
11/20/2014	Case Dismissal, Truancy	Open	Test, Test		emullin@caseworthy.com	20		Yes
10/8/2014	Case Dismissal, Truancy	Open	TruancyTeset, Brian		bbingel@CaseWorthy.com	20	12/31/2014	Yes

Edit an application using the same steps shown for the Court Ordered Summary form.

Volunteer School Requirement Summary

Click the School icon.



The Volunteer School Requirement Summary form displays.


Volunteer School Requirement Summary

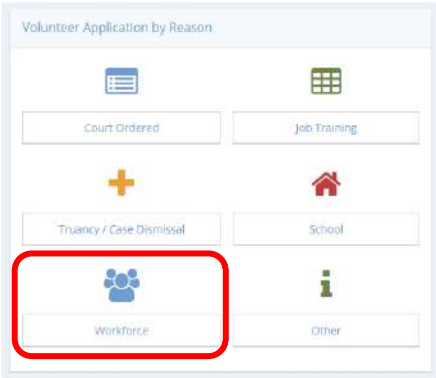
Search

Begin Date	Reason	Status	Name	Phone Number	Email	School Name	Hours To Complete	Completion Deadline	Letter Required Upon Completion
12/3/2014	a school requirement?	Open	Smith, Mary		emullin@caseworthy.com	test			
12/2/2014	a school requirement?	Open	Test, Portal		emullin@caseworthy.com	Test School	20		Yes
11/25/2014	a school requirement?	Open	Jones, Barry			Pioneer High School	40	12/31/2014	Yes
11/25/2014	a school requirement?	Open	Smith, Barry		bbingel@CaseWorthy.com	Pioneer High School	40	12/31/2014	Yes
11/19/2014	a school requirement?	Open	Test, Test			Test school	20		
11/19/2014	a school requirement?	Open	Test, TestEmilee		emullin@caseworthy.com	Test School	10		Yes
11/18/2014	a school requirement?	Open	Test, Test1		emullin@caseworthy.com	Test School	20	5/31/2015	Yes
11/18/2014	a school requirement?	Open	Test, Test2		emullin@caseworthy.com	Test School	20	5/31/2015	Yes
10/8/2014	a school requirement?	Open	SchoolTest, Brian		bbingel@CaseWorthy.com	Pioneer High School	15	1/1/2015	Yes

Edit an application using the same steps shown for the Court Ordered Summary form.

Volunteer Workforce Requirement Summary

Click the Workforce icon.

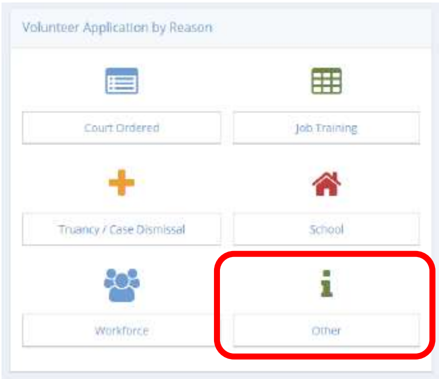


The Volunteer Workforce Requirement Summary form displays.

Edit an application using the same steps shown for the Court Ordered Summary form.

Volunteer Other Reason Summary

Click the Other icon.

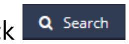


The Volunteer Other Reason Summary form displays.

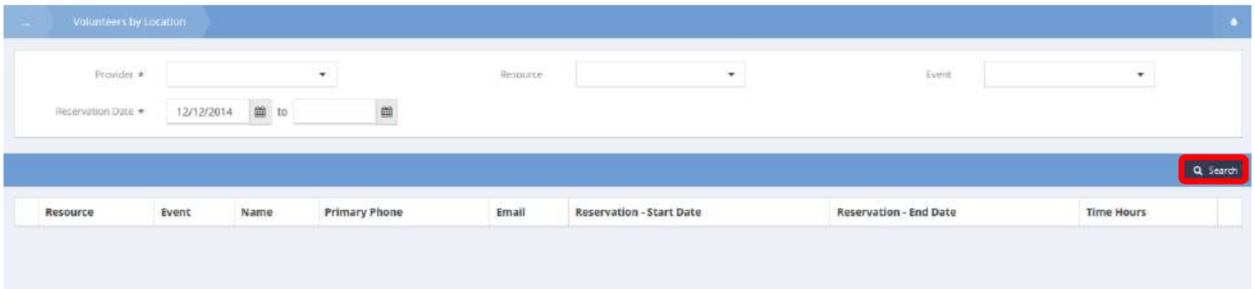
Edit an application using the same steps shown for the Court Ordered Summary form.

Volunteers by Location

Objective: Display list of volunteers based on provider, date, resource, and event.

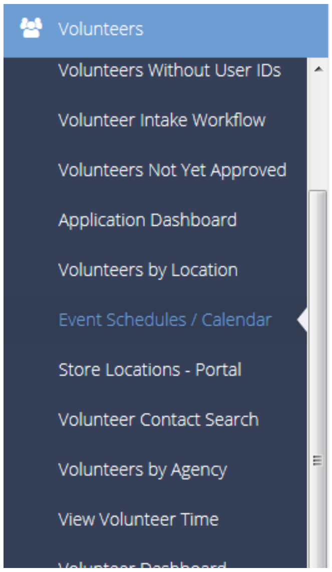
On the Volunteers by Location form, enter reservation dates and select values from the drop-down boxes for Provider, Resource and Event to filter the list displayed. Click 

when parameters are chosen. The list appears on the lower part of the form.

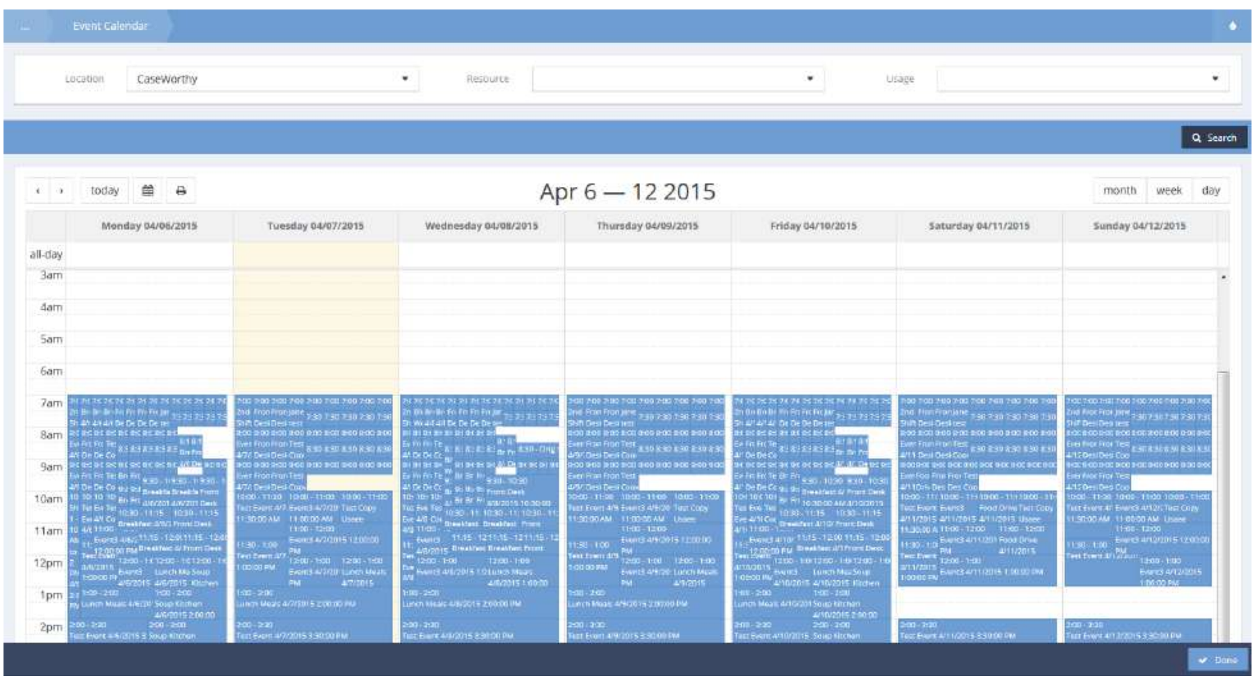


Event Schedules and Calendar

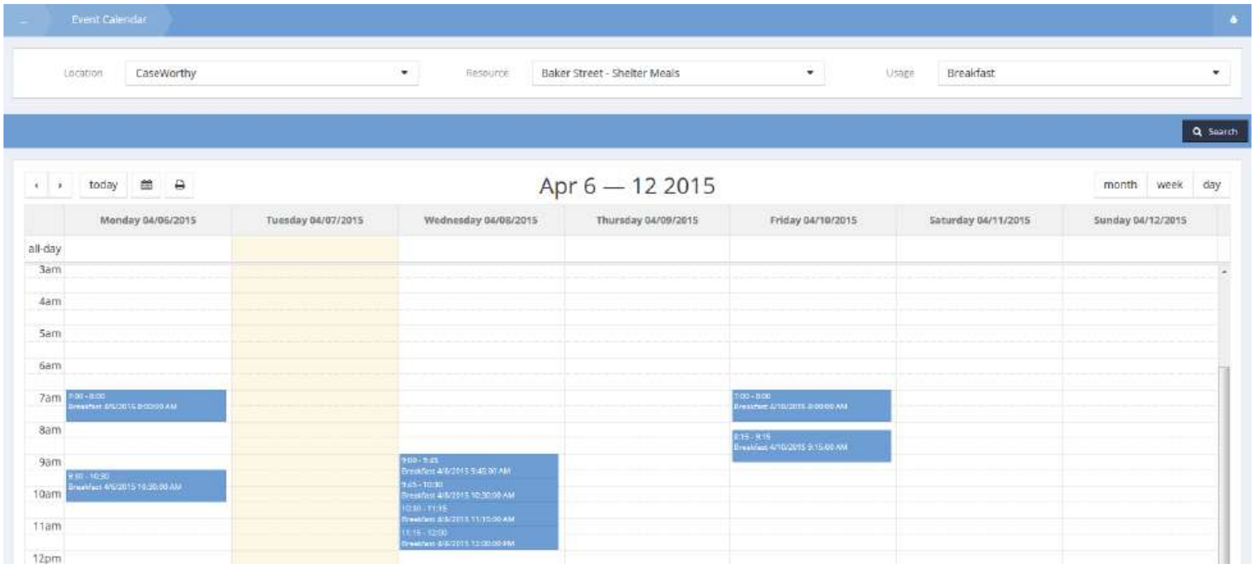
Objective: Make reservations and check-in participants to events.



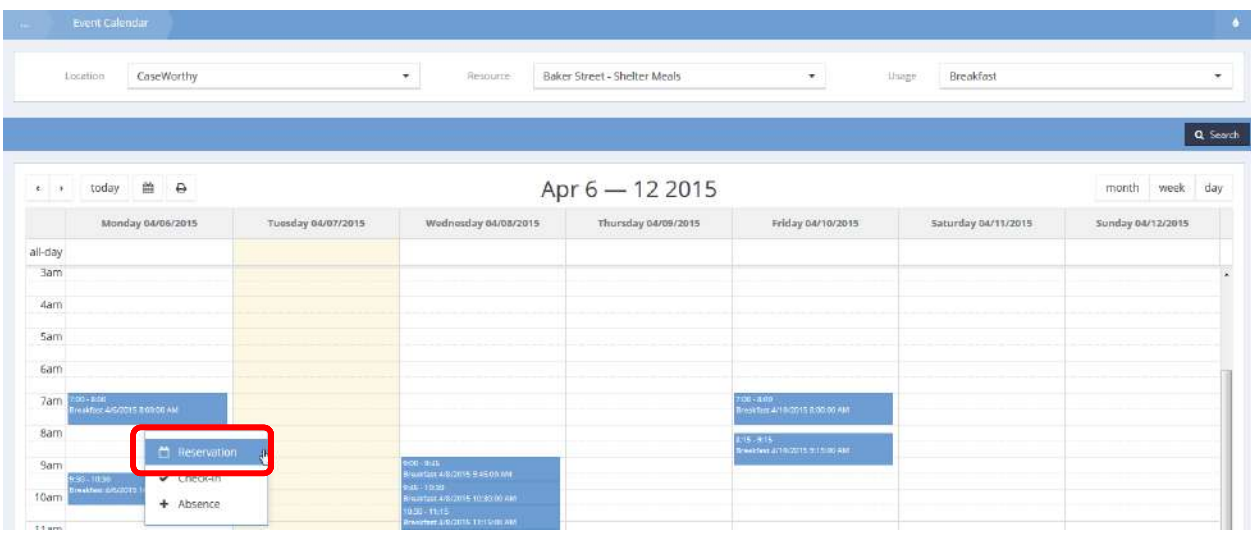
The Event Calendar form displays upon selecting Event Schedules / Calendar from the Volunteers menu.



Filter the events displayed by entering parameters in the location, resource and usage fields at the top of the calendar form.

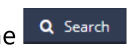


Make reservations or check in clients by clicking on the desired event and selecting from the pop-up menu that appears.

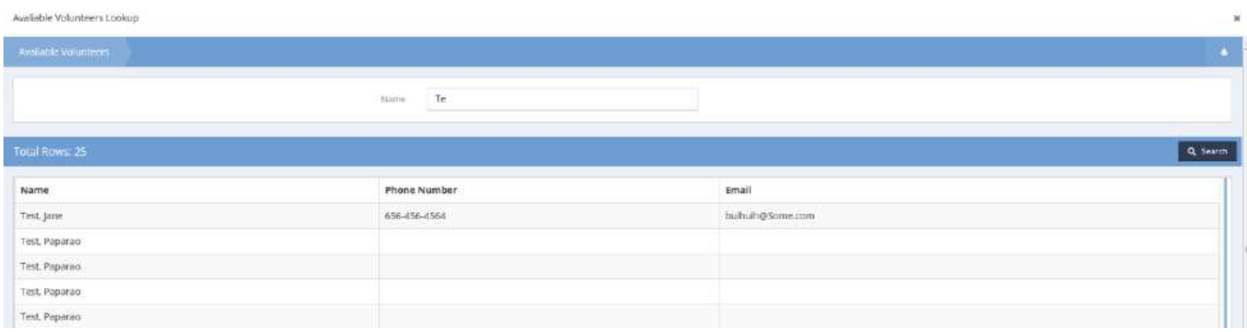


Select Reservation from the pop up menu. The Reservation form displays.

Click on the magnifying glass  icon. The Available Volunteers Lookup form displays.

Enter any or all of the desired participant name and click on the 

button. A list of matching participant names appears.

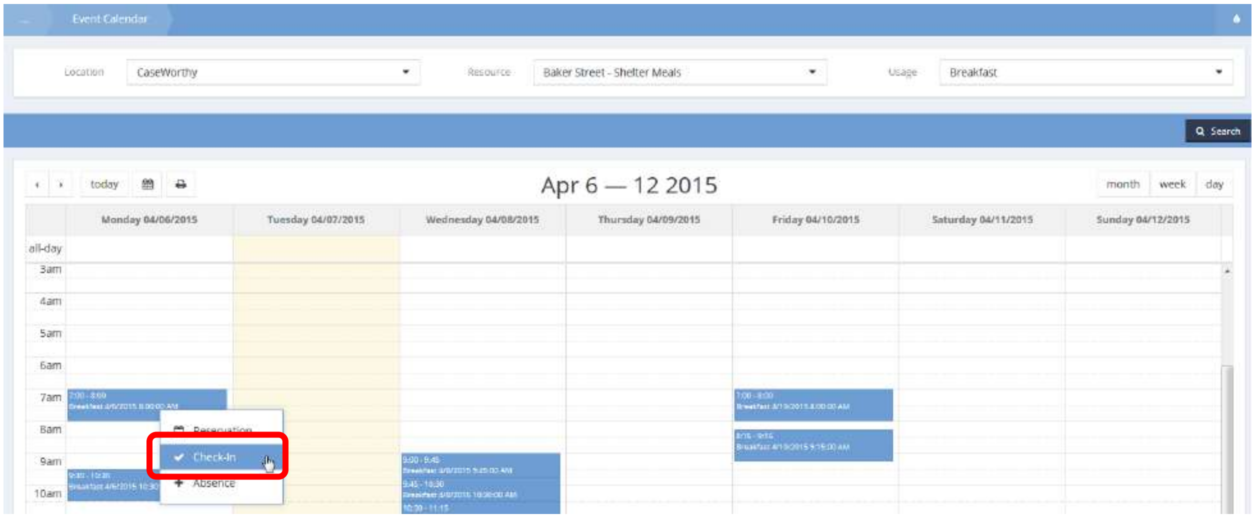


Select the desired participant by clicking on the row. The name now appears on the Reservation form.

Click on the 

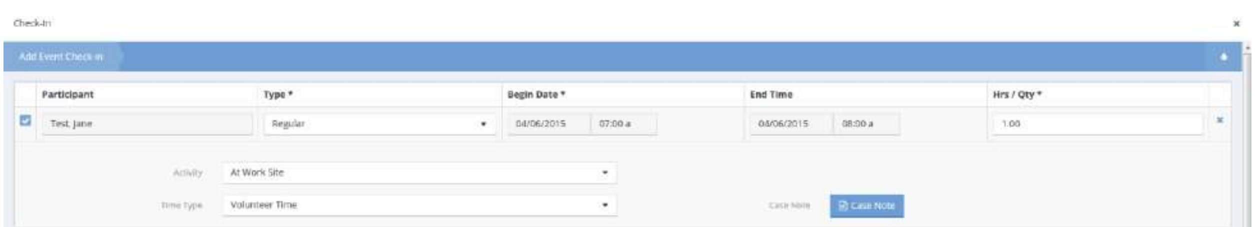
button.

To check in a participant, select Check-In from the pop up menu.



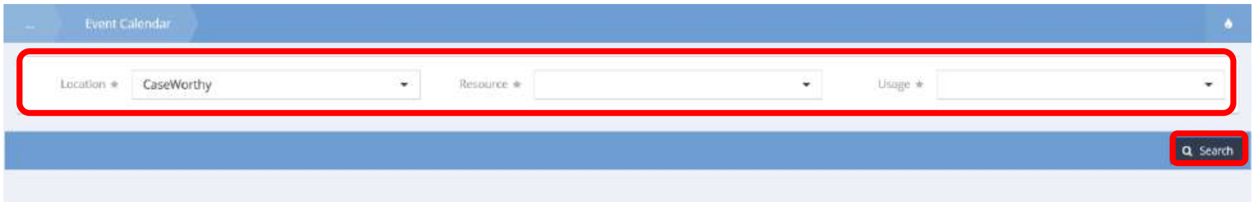
The Check-In form displays. Click on the clear checkbox associated with the desired reservation.

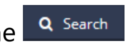
The row expands, presenting editable fields. Make any desired changes or additions to the row including adding case notes. When finished, click on the Save button.



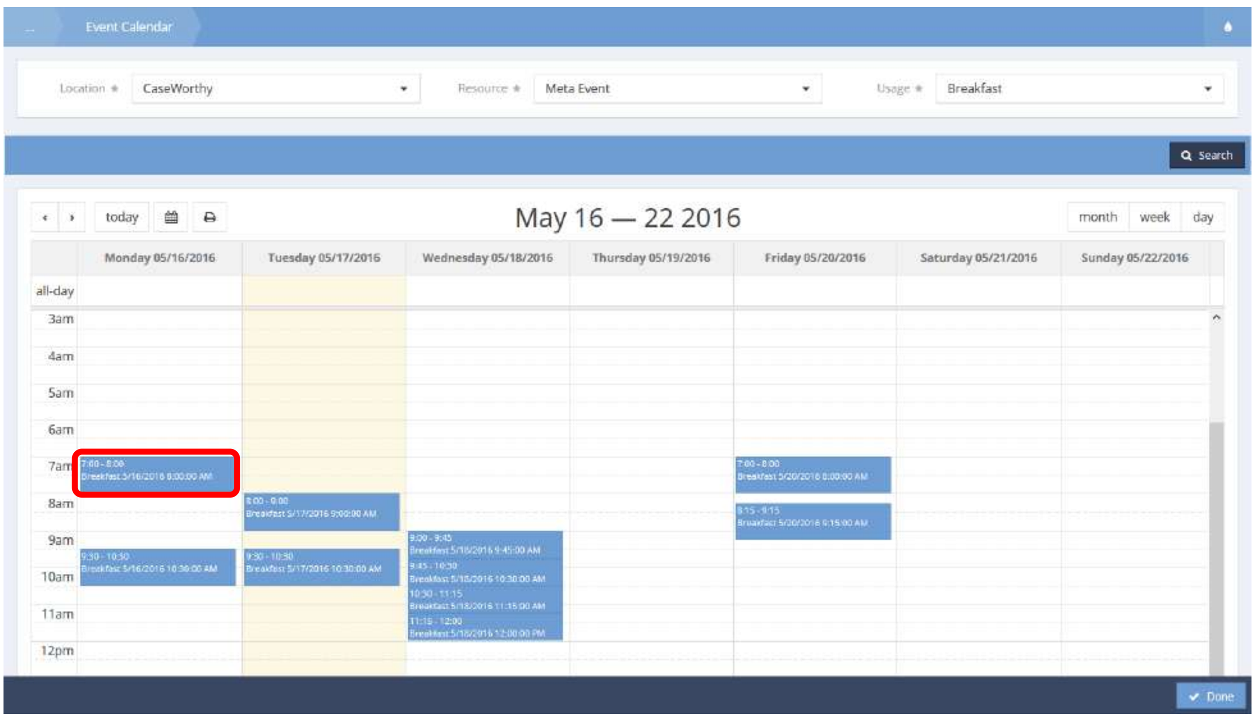
Group Volunteers

The Event Calendar form displays.

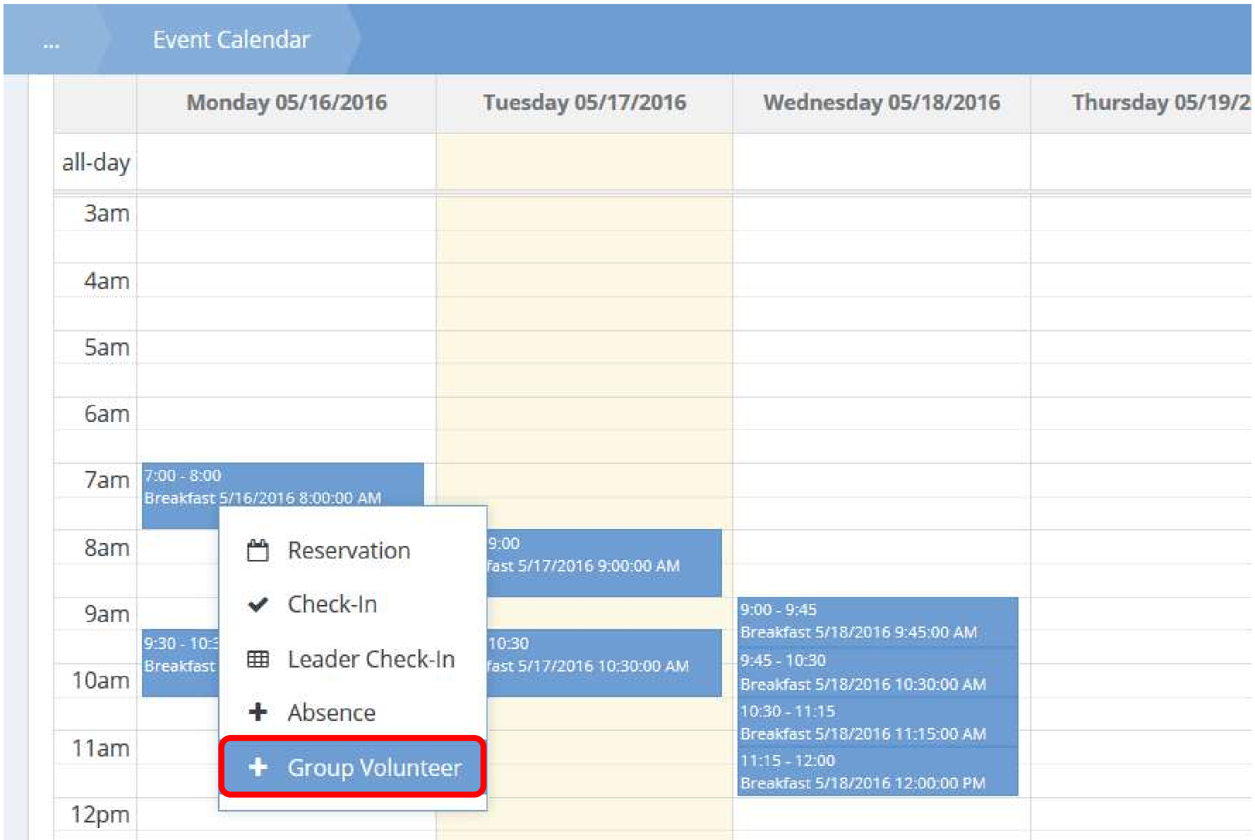


Select a Location, Resource, and Usage from the drop-down menus and click the 

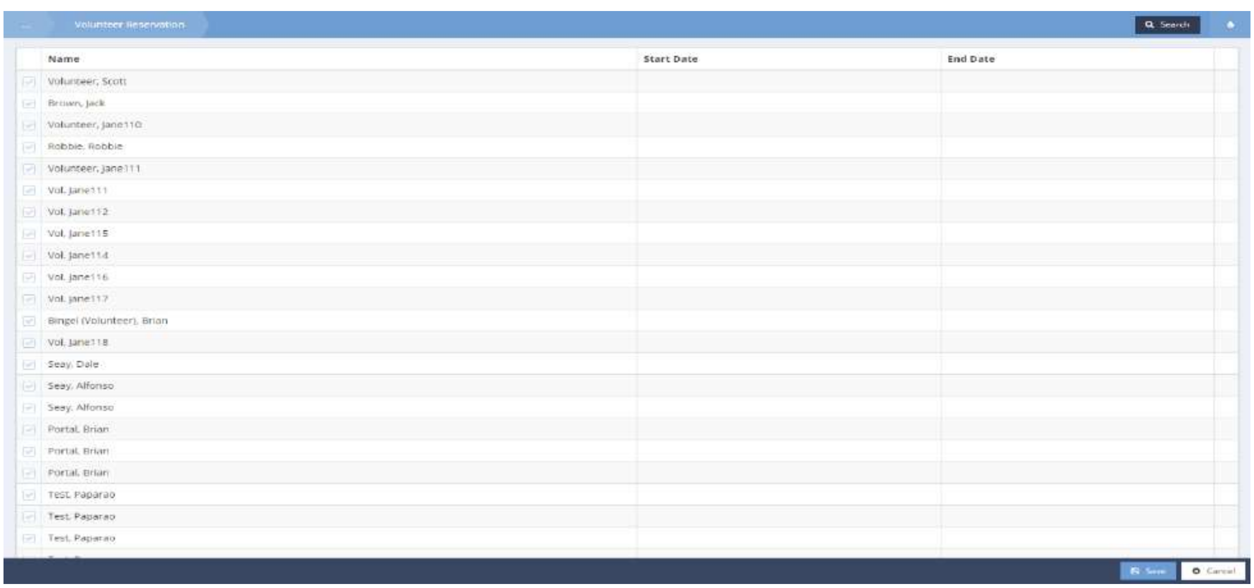
button to populate results.



Click on desired event and select Group Volunteer from the menu options.

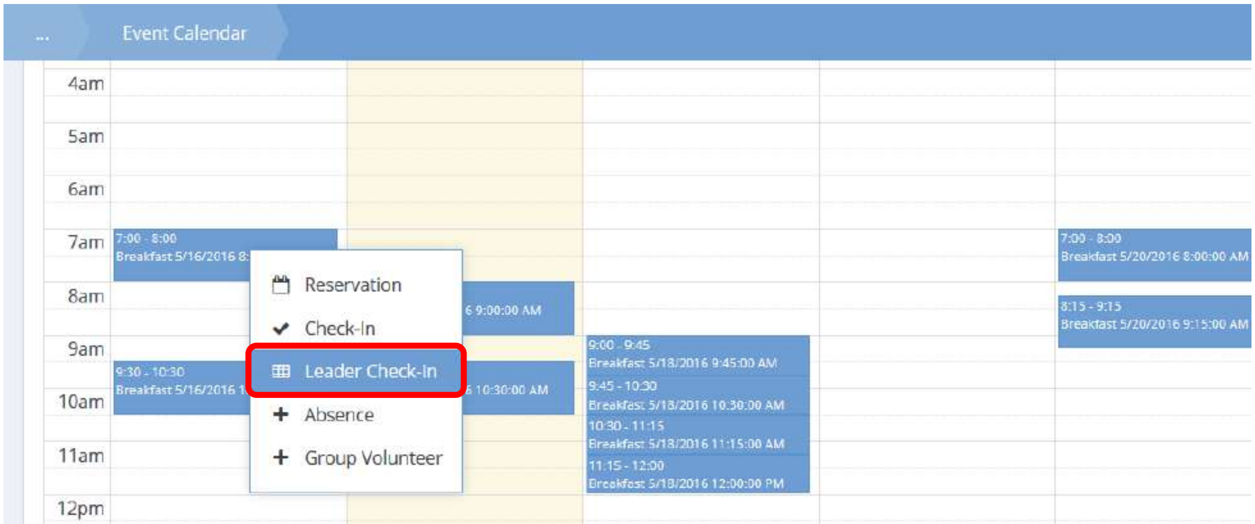


The Volunteer Reservation form displays.

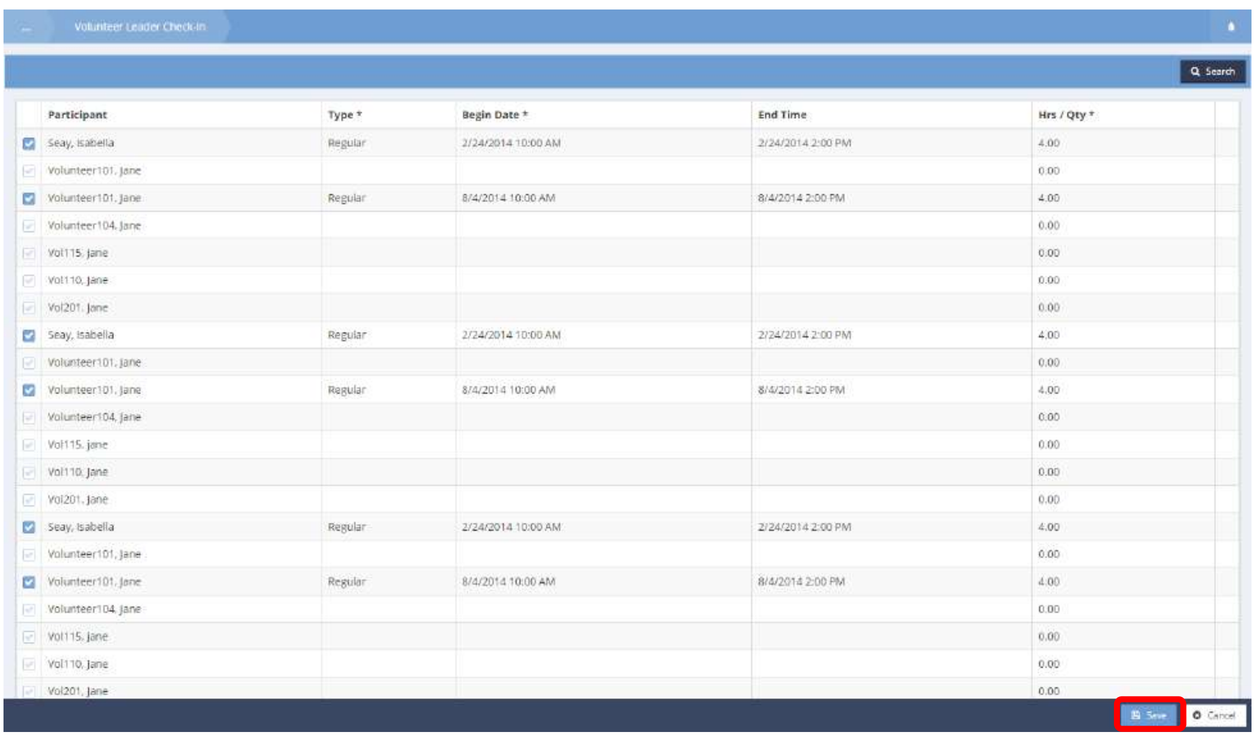


Click the clear checkbox icon associated with the desired volunteer to add them to the group reservation. Once selected the checkbox turns blue. Click the Save button to save and exit. The

Event Calendar form displays once again. Select the desired calendar and event. Then select Leader Check-In from the menu options.

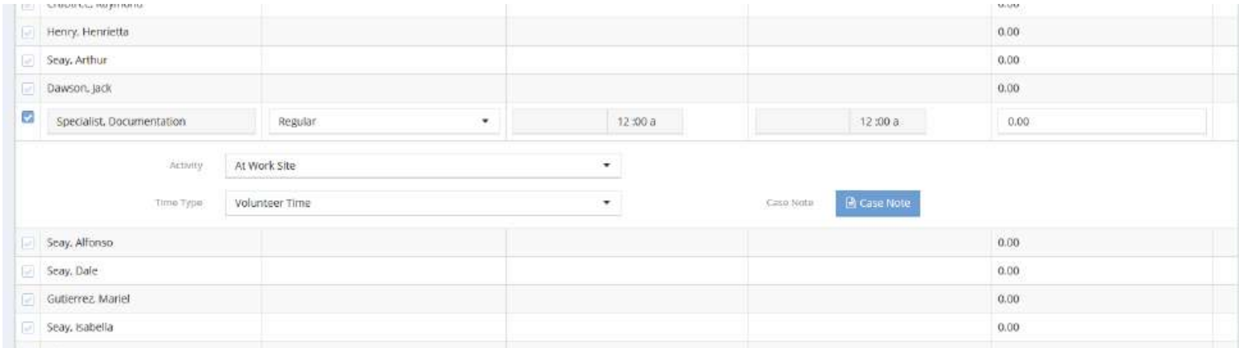


The Volunteer Leader Check-In form displays.



Participant	Type *	Begin Date *	End Time	Hrs / Qty *
Seay, Isabella	Regular	2/24/2014 10:00 AM	2/24/2014 2:00 PM	4.00
Volunteer101, Jane				0.00
Volunteer101, Jane	Regular	8/4/2014 10:00 AM	8/4/2014 2:00 PM	4.00
Volunteer104, Jane				0.00
Vol115, Jane				0.00
Vol110, Jane				0.00
Vol201, Jane				0.00
Seay, Isabella	Regular	2/24/2014 10:00 AM	2/24/2014 2:00 PM	4.00
Volunteer101, Jane				0.00
Volunteer101, Jane	Regular	8/4/2014 10:00 AM	8/4/2014 2:00 PM	4.00
Volunteer104, Jane				0.00
Vol115, Jane				0.00
Vol110, Jane				0.00
Vol201, Jane				0.00
Seay, Isabella	Regular	2/24/2014 10:00 AM	2/24/2014 2:00 PM	4.00
Volunteer101, Jane				0.00
Volunteer101, Jane	Regular	8/4/2014 10:00 AM	8/4/2014 2:00 PM	4.00
Volunteer104, Jane				0.00
Vol115, Jane				0.00
Vol110, Jane				0.00
Vol201, Jane				0.00

Only those previously checked in to this event as volunteers populate this form. Click the clear checkbox icon associated with the desired volunteer leader to assign them a leader role for the reservation. Once selected, the checkbox turns blue and the row expands for editing.

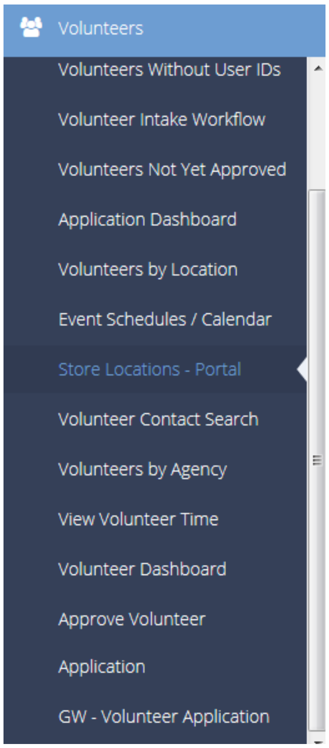


Enter information as desired. Click the Save button to save and exit.

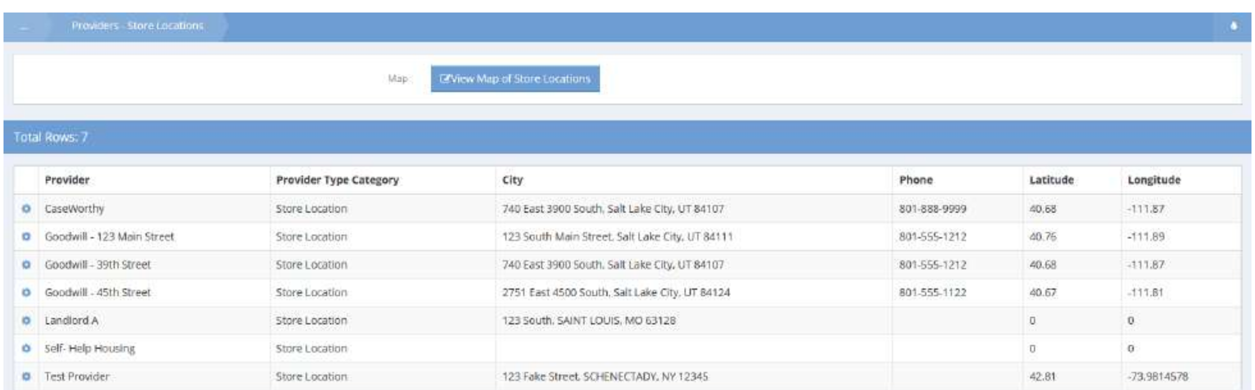
Store Locations - Portal

Providers - Store Locations

Objective: View a map of provider store locations or navigate to any of several provider related actions.

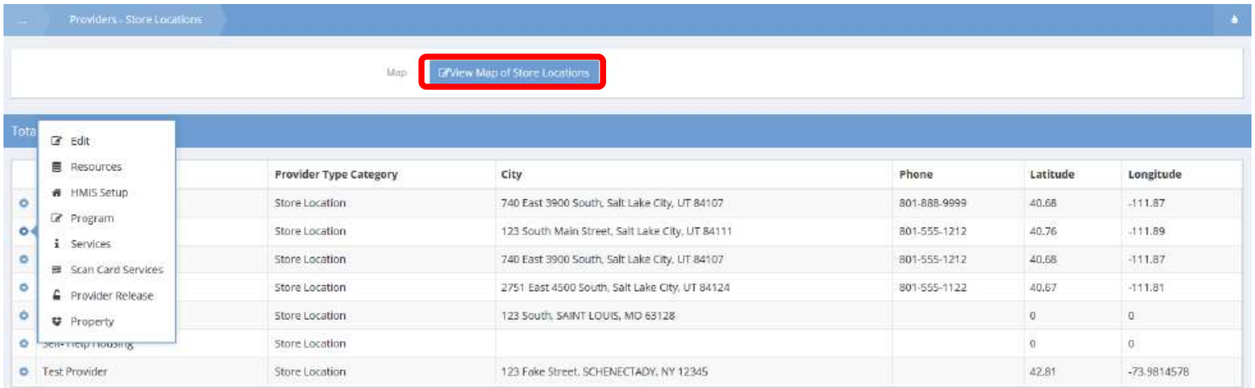


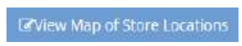
The Providers – Store Locations form displays.



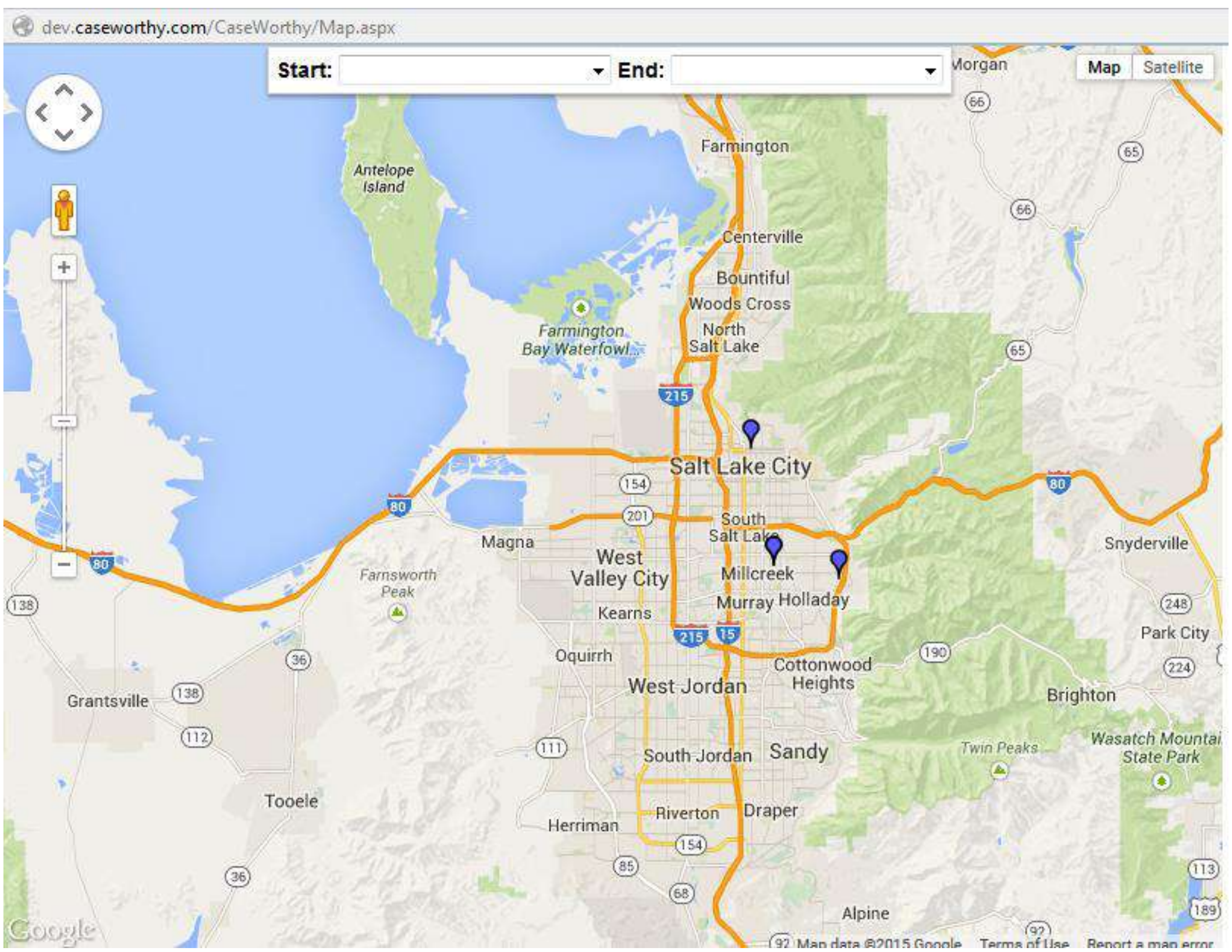
Provider	Provider Type Category	City	Phone	Latitude	Longitude
CaseWorthy	Store Location	740 East 3900 South, Salt Lake City, UT 84107	801-888-9999	40.68	-111.87
Goodwill - 123 Main Street	Store Location	123 South Main Street, Salt Lake City, UT 84111	801-555-1212	40.76	-111.89
Goodwill - 39th Street	Store Location	740 East 3900 South, Salt Lake City, UT 84107	801-555-1212	40.68	-111.87
Goodwill - 45th Street	Store Location	2751 East 4500 South, Salt Lake City, UT 84124	801-555-1122	40.67	-111.81
Landlord A	Store Location	123 South, SAINT LOUIS, MO 63128		0	0
Self- Help Housing	Store Location			0	0
Test Provider	Store Location	123 Fake Street, SCHENECTADY, NY 12345		42.81	-73.9814578

Click on the action gear for any entry to see the options offered there.



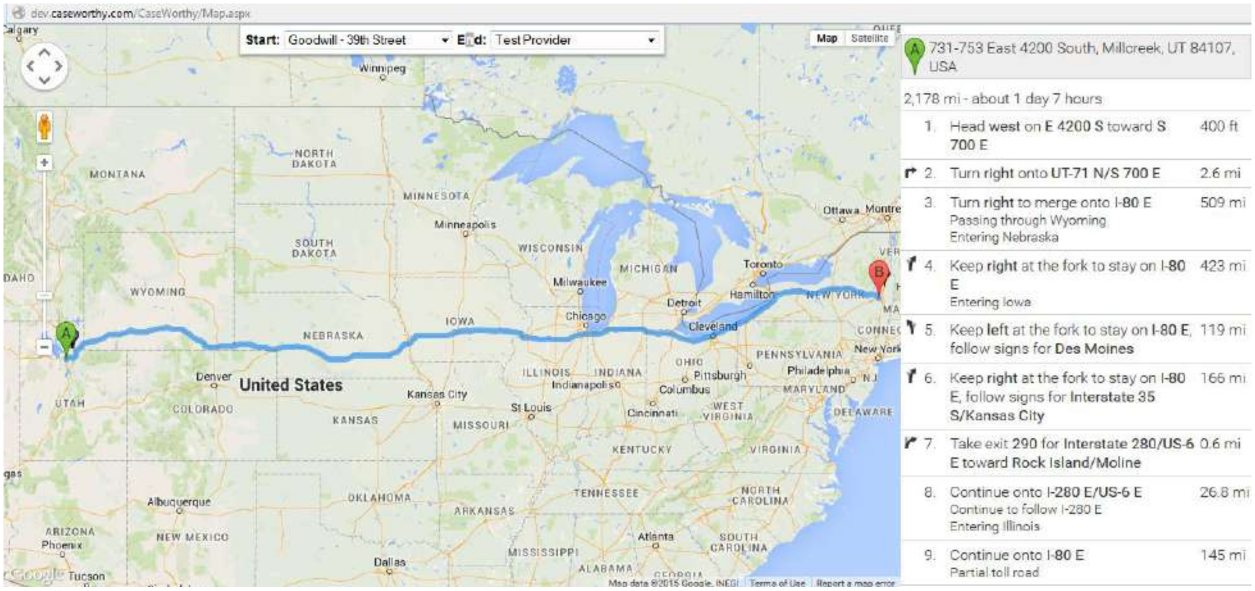
To map the store locations, click on the  button.

A new window opens with a map of the locations on the list.

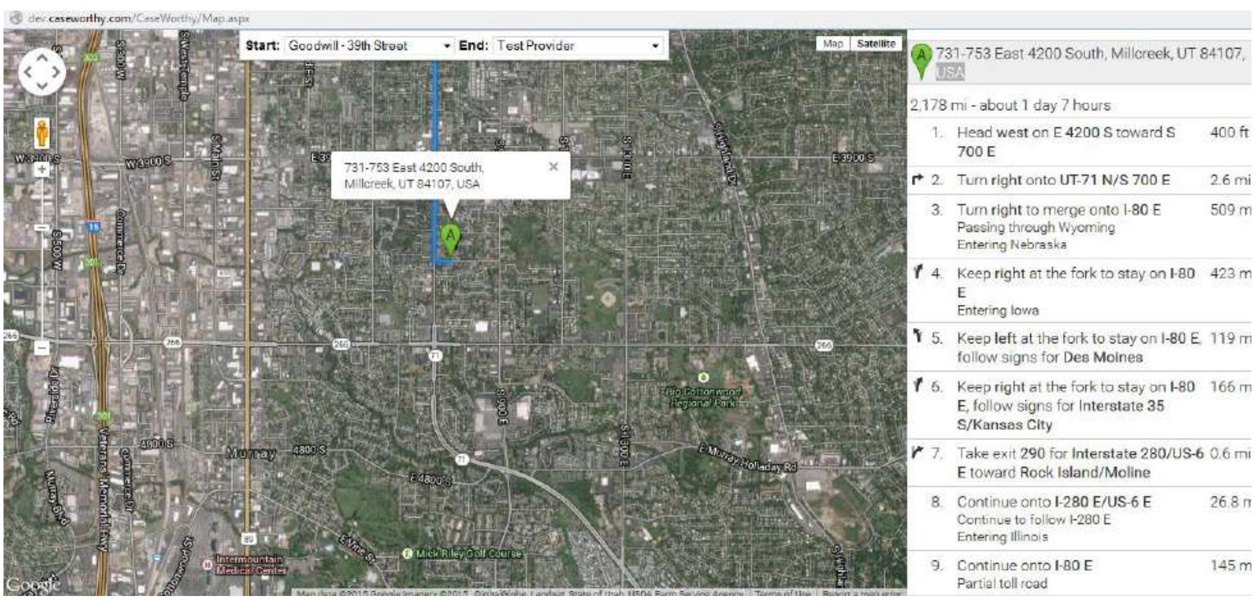


Select values from the drop-down lists for start and end on the map.

The image changes and the matching locations display to the right of the map.

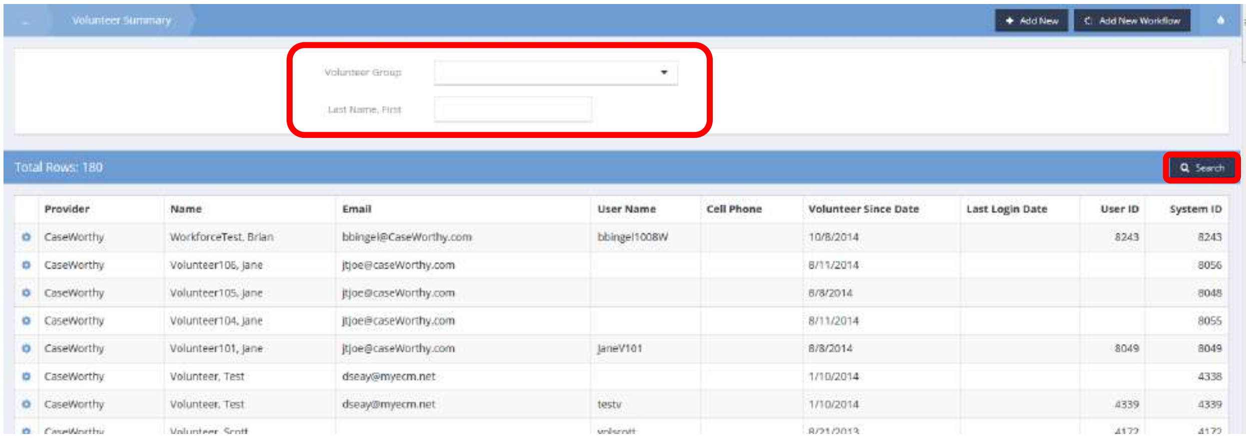


Click on Satellite and the image changes again.



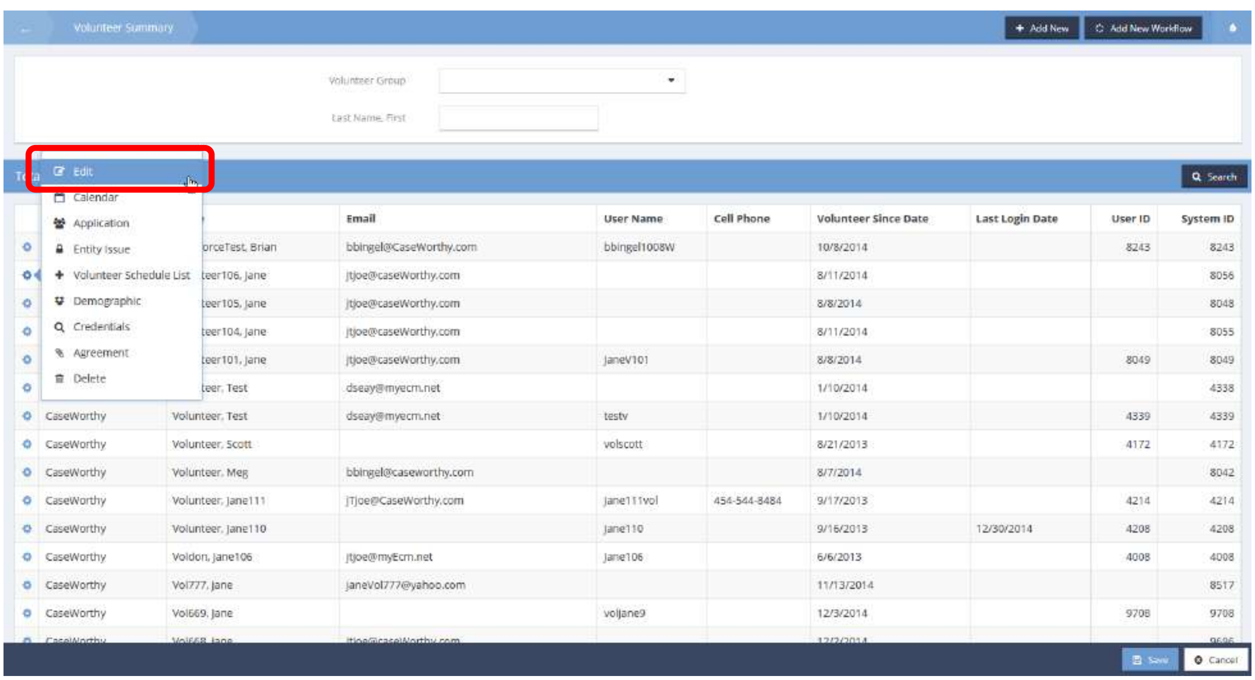
Volunteer Contact Search

Objective: Search for a volunteer, view and edit volunteer contact info.

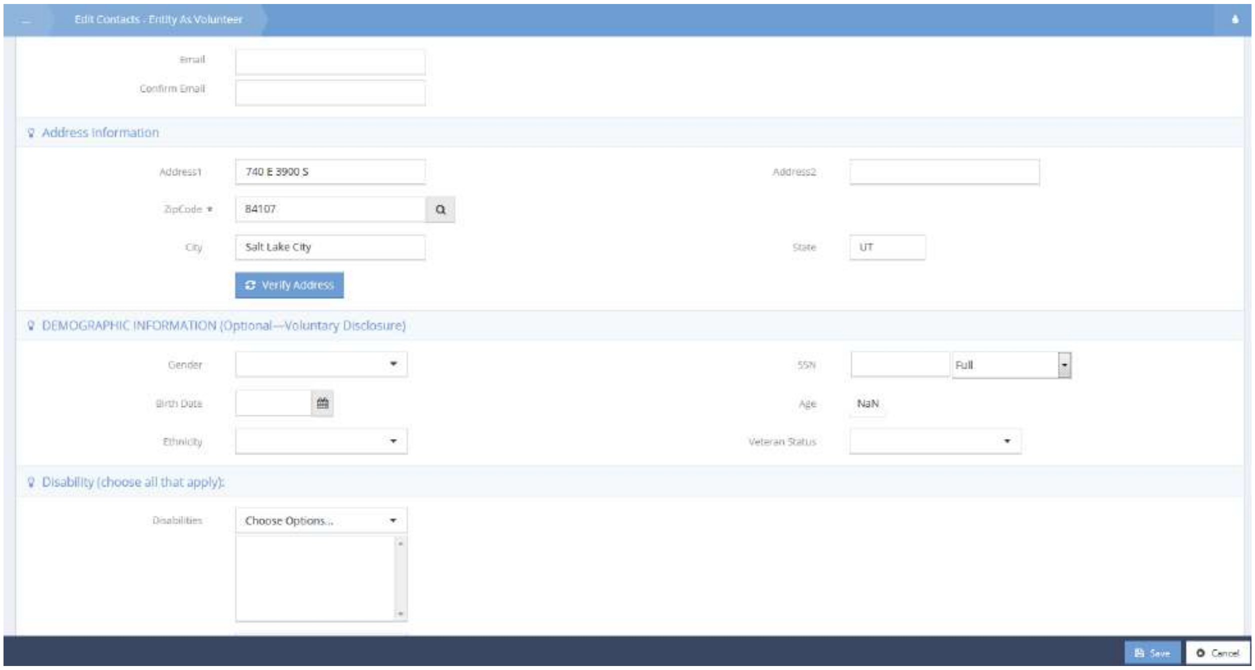


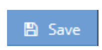
The Volunteer Summary form displays a list of all the volunteers in the system. To filter the list, on the form header, choose a group from the drop-down list and/or enter a name, then click on the Search button.

To edit a volunteer's information, on the filtered list, click the action gear icon associated with the desired volunteer and select Edit from the pop up menu that appears.

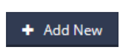


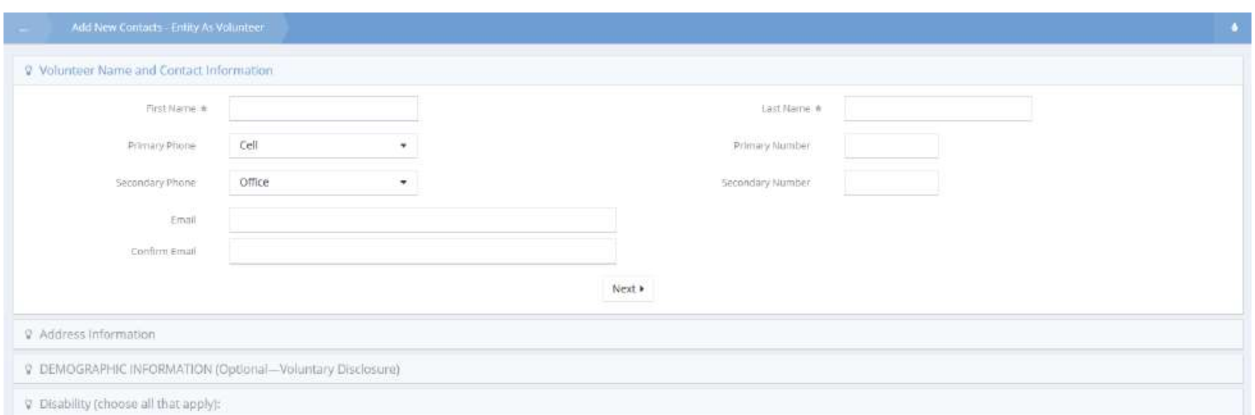
The Edit Contacts – Entity as Volunteer form displays.



Make any necessary changes and click  when finished.

Add Volunteer

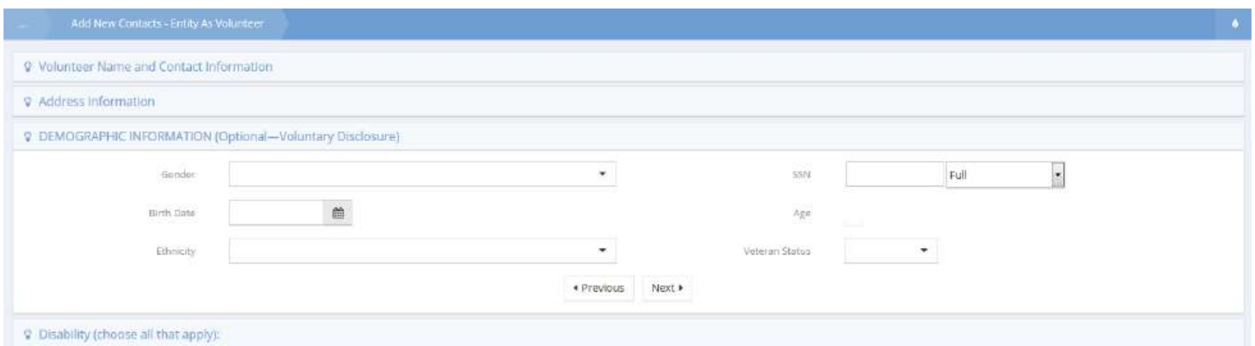
To add a new volunteer, click the  button. The Contacts – Entity as a Volunteer (Add New) form displays.



Enter the new volunteer's first and last names and the dates of service. If desired, enter the telephone and email information.

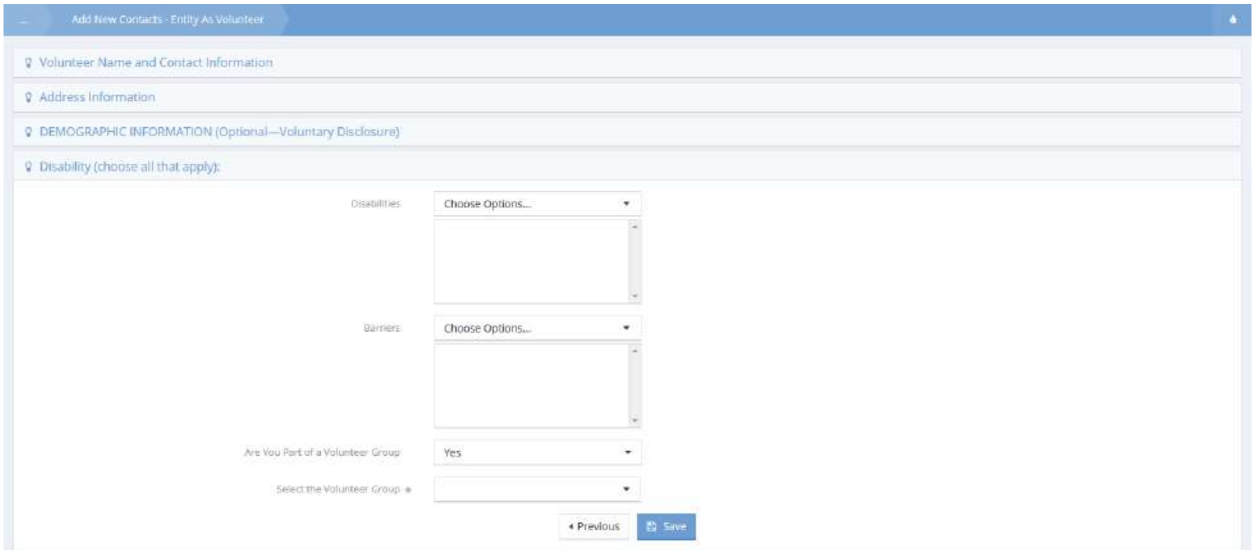
Click Next ▸ to proceed to the next step.

Enter the volunteer's address information. Use the Verify Address button to verify after enter address information. Click Next ▸ to proceed to the next step.



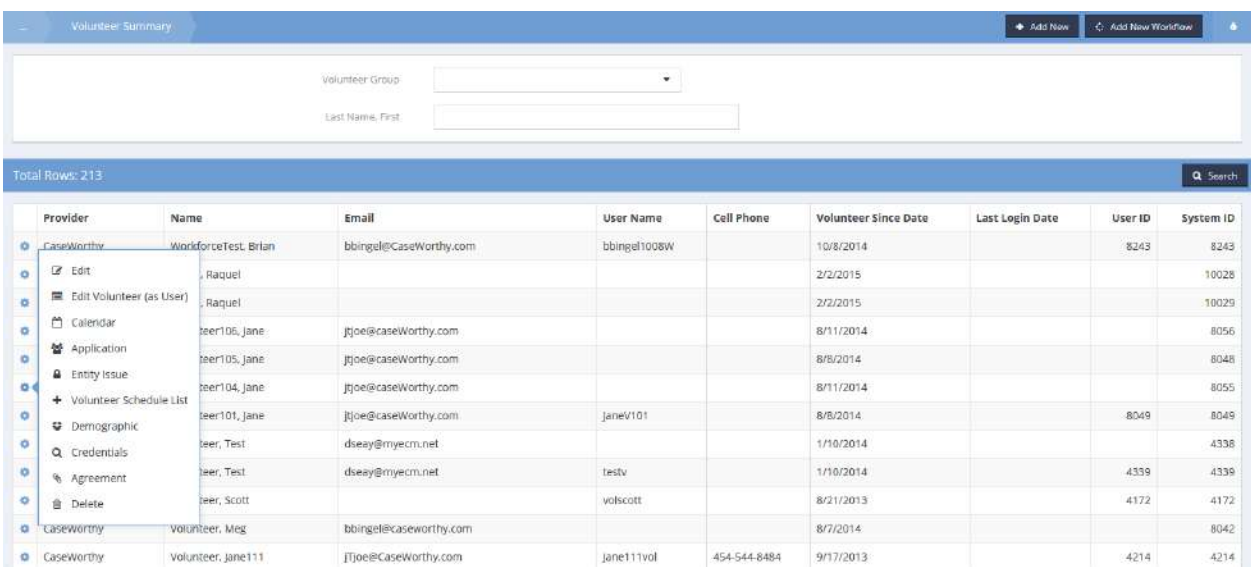
Demographic information is voluntary. If desired, enter the volunteer's gender, date of birth, social security number, ethnicity, and veteran status of the volunteer.

Click Next to proceed to the next step.



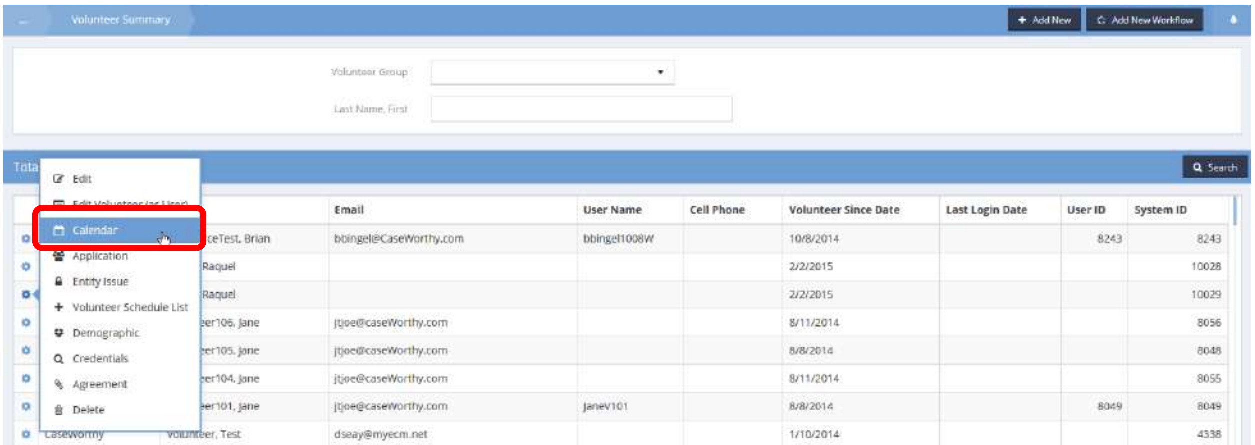
The last section of the form allows the user to identify any limitations the volunteer may have by making selections from the multi-select drop-down lists of disabilities and barriers. If the volunteer is a member of a group, the default value of "No" can be changed to "Yes". This displays a new field, "Select the Volunteer Group". Choose the group of which the volunteer is a part. Click the Save button.

The new volunteer is now in the volunteers list and various actions can be taken from the list by selecting from the menu that displays when the desired volunteer's record is clicked on.

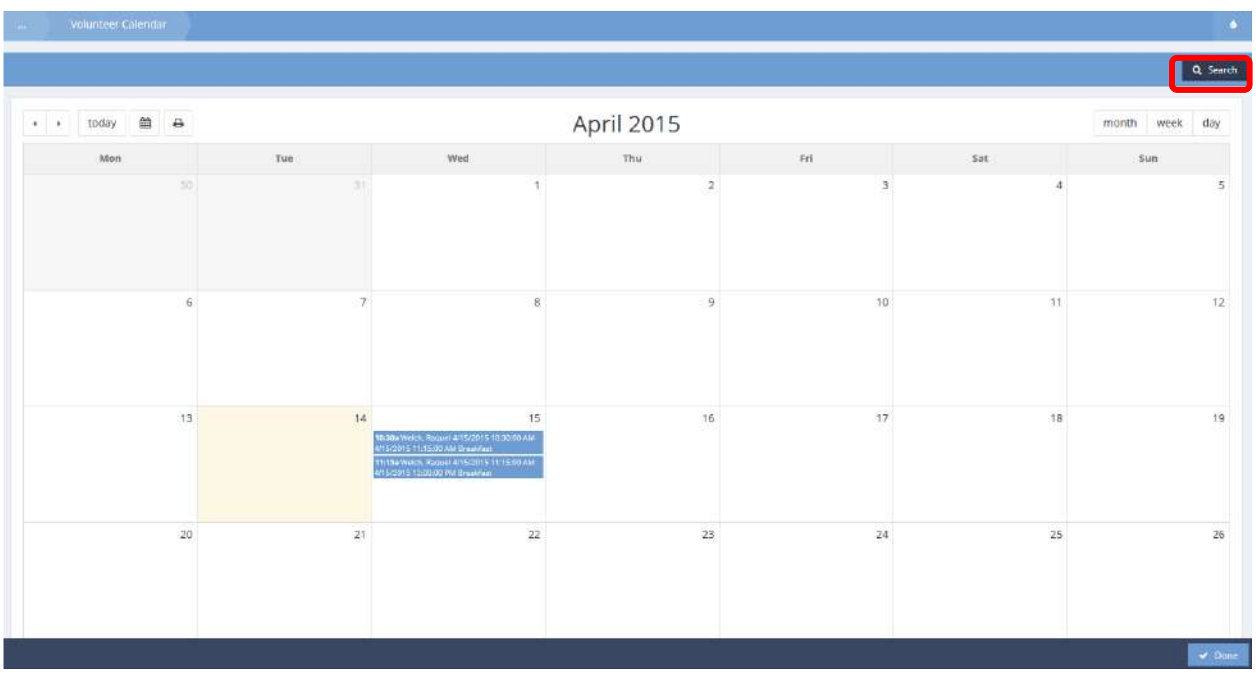


Calendar

To view a calendar specific to an individual volunteer, locate the desired volunteer and click on the action gear icon associated with it. Select Calendar from the pop-up menu that appears.



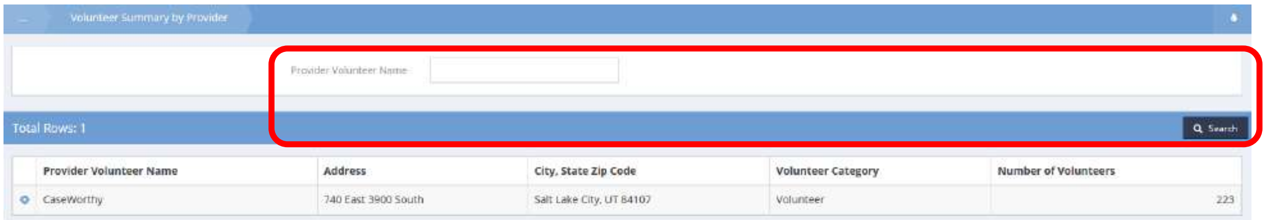
The Volunteer Calendar form displays. Enter the desired date range and click on the Search button. The calendar displays any time served by the volunteer within the entered date range.



Volunteers by Agency

The Volunteer Summary by Provider form allows volunteer information to be viewed specific to providers.

The search bar can be used to filter providers by name.



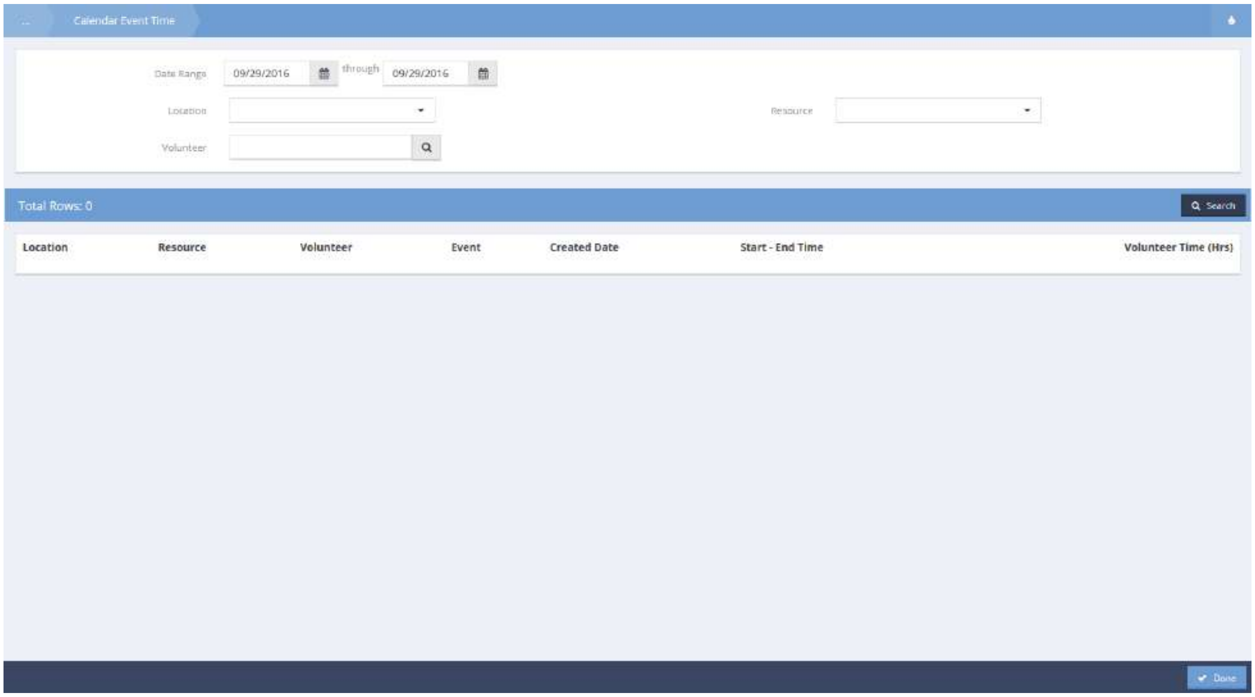
Summaries of volunteers, service activities, teams, assigned clients, and time may all be accessed through the relevant menu items.

View Volunteer Time

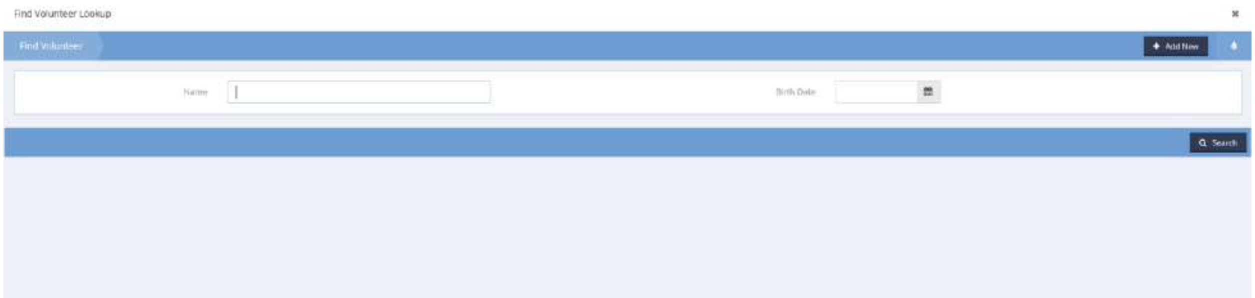
Objective: View volunteer hours by volunteer.

Navigation: Organization>Volunteers>View Volunteer Time

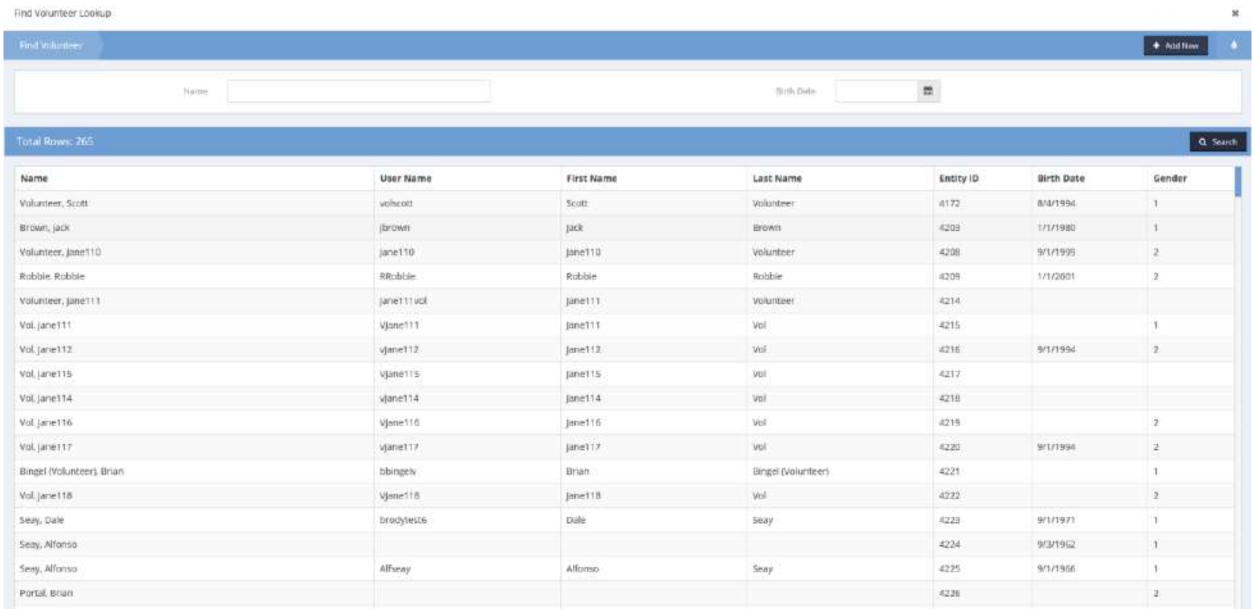
The Calendar Event Time form displays



Use the Volunteer lookup field to select a volunteer for whom to view time. The Find Volunteer form displays.



Search by volunteer name or birthdate or simply click the Search button to populate all results.


Find Volunteer Lookup

Find Volunteer

+ Add New

Name

Birth Date

Total Rows: 265

Search

Name	User Name	First Name	Last Name	Entity ID	Birth Date	Gender
Volunteer, Scott	volscott	Scott	Volunteer	4172	8/4/1994	1
Brown, jack	jbrown	jack	Brown	4203	1/1/1980	1
Volunteer, Jane110	jane110	Jane110	Volunteer	4208	9/1/1999	2
Robbie, Robbie	RRobbie	Robbie	Robbie	4209	1/1/2001	2
Volunteer, jane111	jane111vol	jane111	Volunteer	4214		
Vol, jane111	VJane111	Jane111	Vol	4215		1
Vol, jane112	vjane112	Jane112	Vol	4216	9/1/1994	2
Vol, jane115	vjane115	jane115	vol	4217		
Vol, Jane114	vjane114	Jane114	Vol	4218		
Vol, jane116	VJane116	Jane116	Vol	4219		2
Vol, jane117	vjane117	jane117	vol	4220	9/1/1994	2
Bingel (Volunteer), Brian	bbingelv	Brian	Bingel (Volunteer)	4221		1
Vol, jane118	VJane118	Jane118	Vol	4222		2
Seay, Dale	brodytest6	Dale	Seay	4223	9/1/1971	1
Seay, Alfonso				4224	9/3/1962	1
Seay, Alfonso	Alfseay	Alfonso	Seay	4225	9/1/1966	1
Portal, Brian				4226		2

Select the desired volunteer. The form closes upon selection.

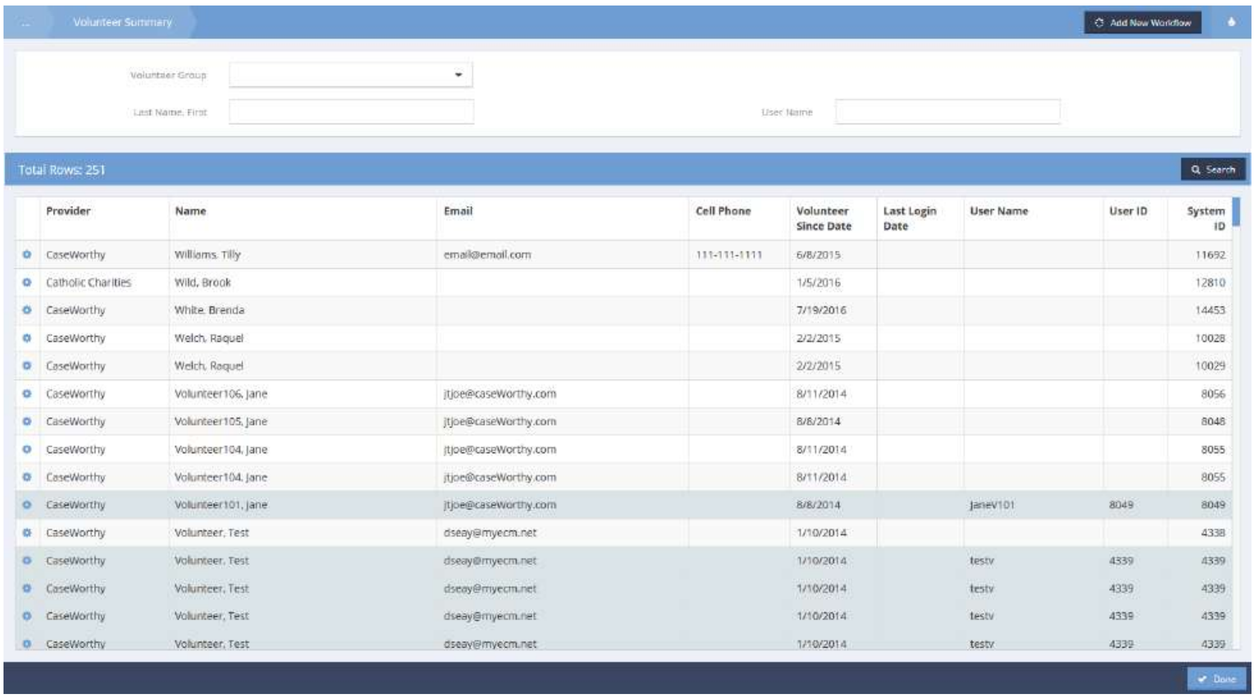
Note: ***Click the*** + Add New ***button to add a new volunteer record on the fly.***

Find Volunteers

Objective: View volunteer hours by volunteer.

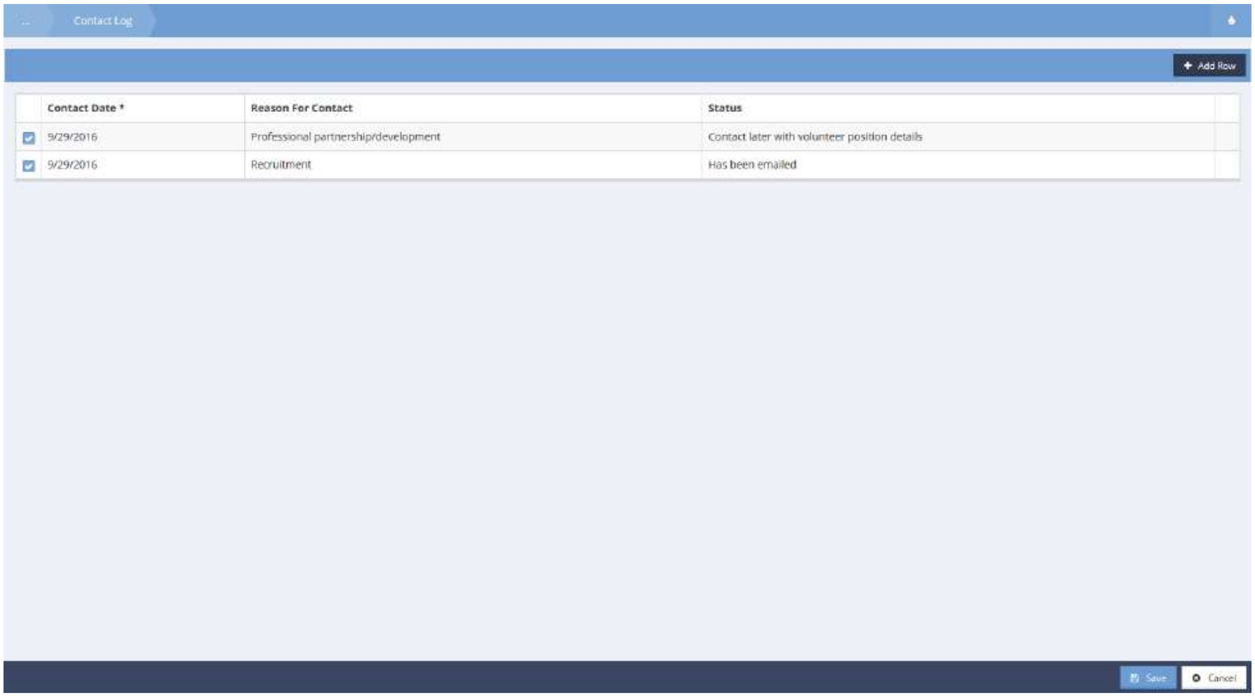
Navigation: Organization>Volunteers>Find Volunteers

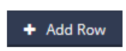
The Volunteer Summary form displays.



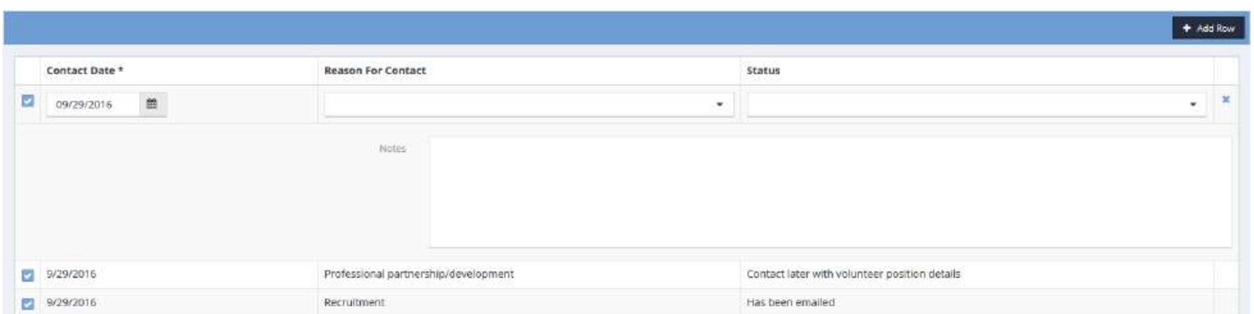
Click the action gear  icon associated with the desired volunteer and select Volunteer Contact Log from the menu options.

The Contact Log form displays existing contact information for the volunteer.



To add additional contact information, click the 

button. A new row appears.



Select a reason for desired contact as well as a status indicating what kind of contact has already been made. Add any notes as desired. To edit existing contact requests, click the blue checkbox  icon associated with the desired request, the row expands for editing. Click the 

button to save and exit.

Volunteer Dashboard

The Volunteer Information form is used to view and manage current unapproved volunteers. Click the desired volunteer to begin. The Approve Volunteer Applications form displays. This form is covered in the next section.


Volunteer Information

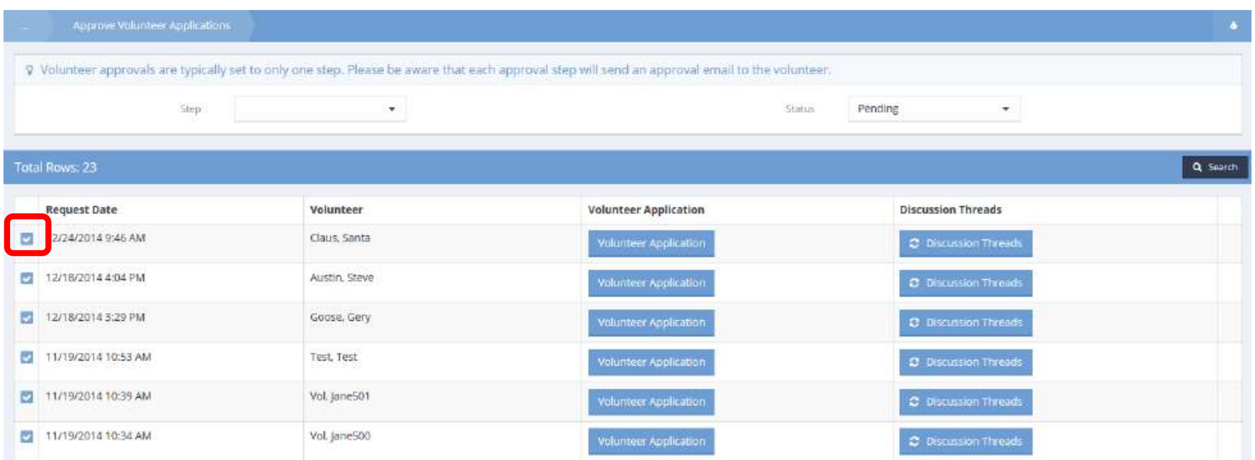
Unapproved Volunteer

Status	Volunteer	Created Date	Reason
Pending	Volunteer106, Jane	09/26/2014	
Pending	Volunteer106, Jane	09/26/2014	
Pending	Volunteer106, Jane	09/26/2014	
Pending	Volunteer106, Jane	09/26/2014	
Pending	Volunteer106, Jane	09/26/2014	
Pending	Volunteer105, Jane	09/26/2014	
Pending	Volunteer104, Jane	09/26/2014	
Pending	SchoolTest, Brian	10/08/2014 12:37 AM	2
Pending	Vol, Jane	10/08/2014 2:17 AM	102
Pending	OtherTest, Brian	10/08/2014 12:48 AM	105

Approve Volunteer Application

Objective: View a list of volunteer applications filtered by status and step in the approval process.

To edit, click the blue checkbox next to a volunteer.


Approve Volunteer Applications

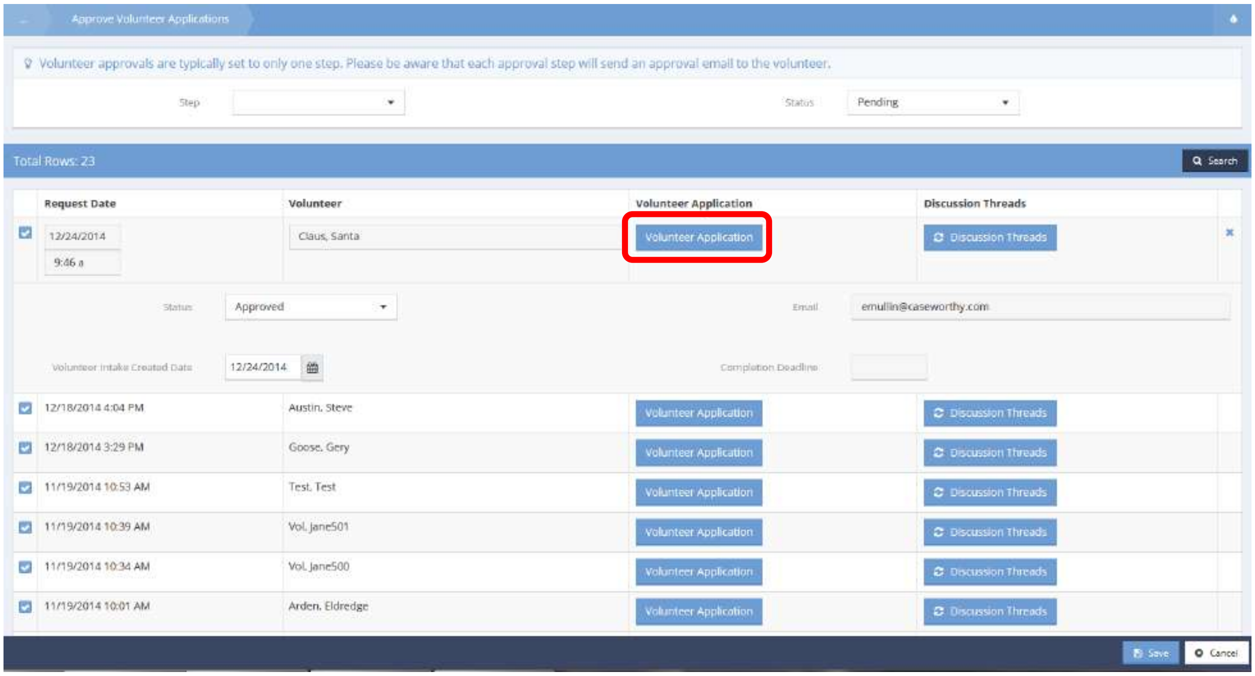
Volunteer approvals are typically set to only one step. Please be aware that each approval step will send an approval email to the volunteer.

Step | Status: Pending

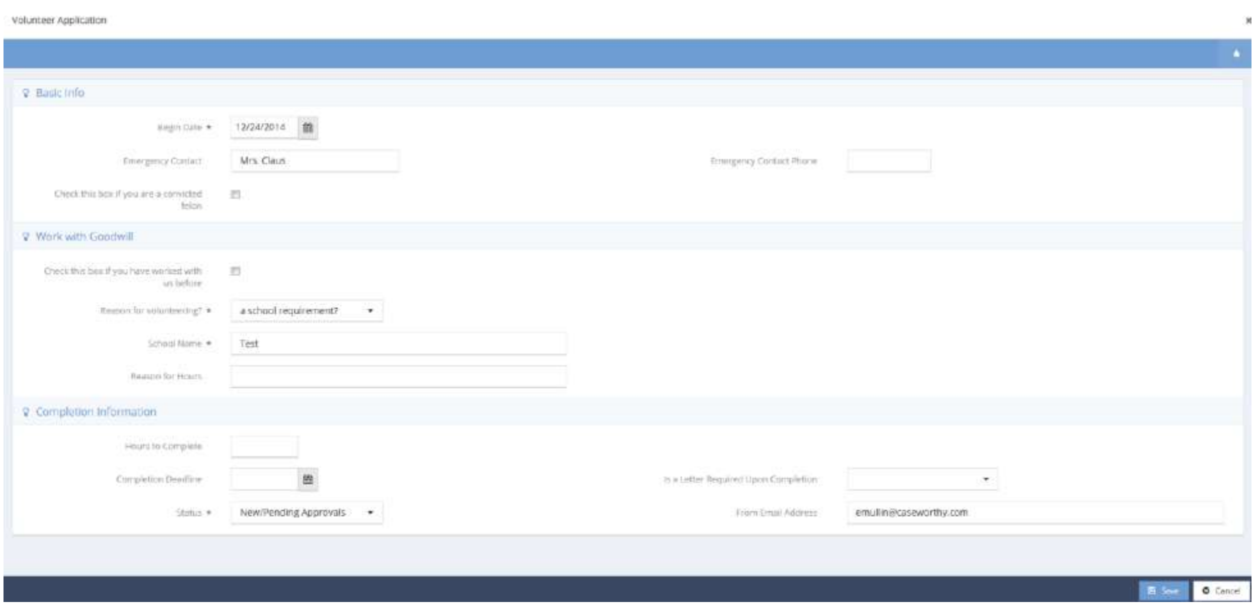
Total Rows: 23 | Search

Request Date	Volunteer	Volunteer Application	Discussion Threads
2/24/2014 9:46 AM	Claus, Santa	Volunteer Application	Discussion Threads
12/18/2014 4:04 PM	Austin, Steve	Volunteer Application	Discussion Threads
12/18/2014 3:29 PM	Goose, Gery	Volunteer Application	Discussion Threads
11/19/2014 10:53 AM	Test, Test	Volunteer Application	Discussion Threads
11/19/2014 10:39 AM	Vol, Jane501	Volunteer Application	Discussion Threads
11/19/2014 10:34 AM	Vol, Jane500	Volunteer Application	Discussion Threads

The row expands. Click Volunteer Application to open the application and make any changes.



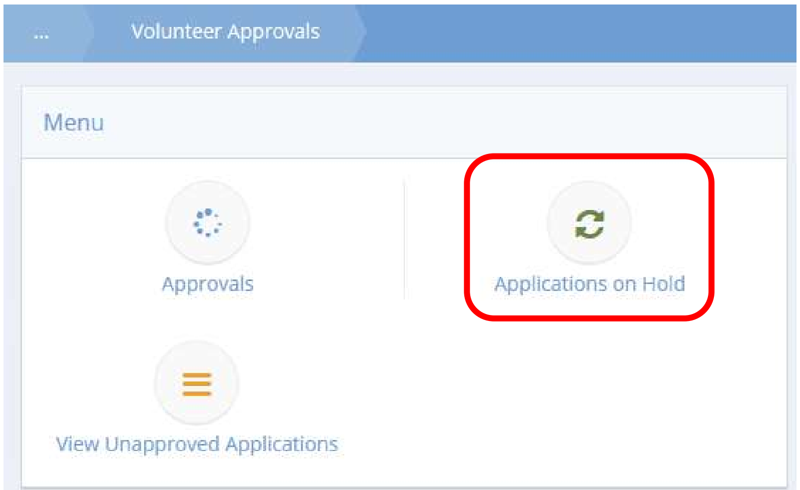
The Volunteer Application form displays.



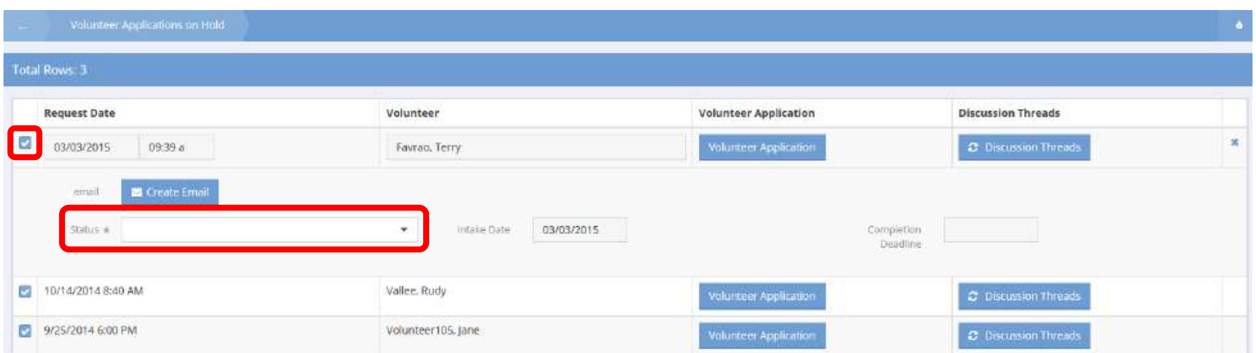
Click Save when finished.

Volunteer Applications on Hold

Objective: Change status of volunteer applications placed on hold.



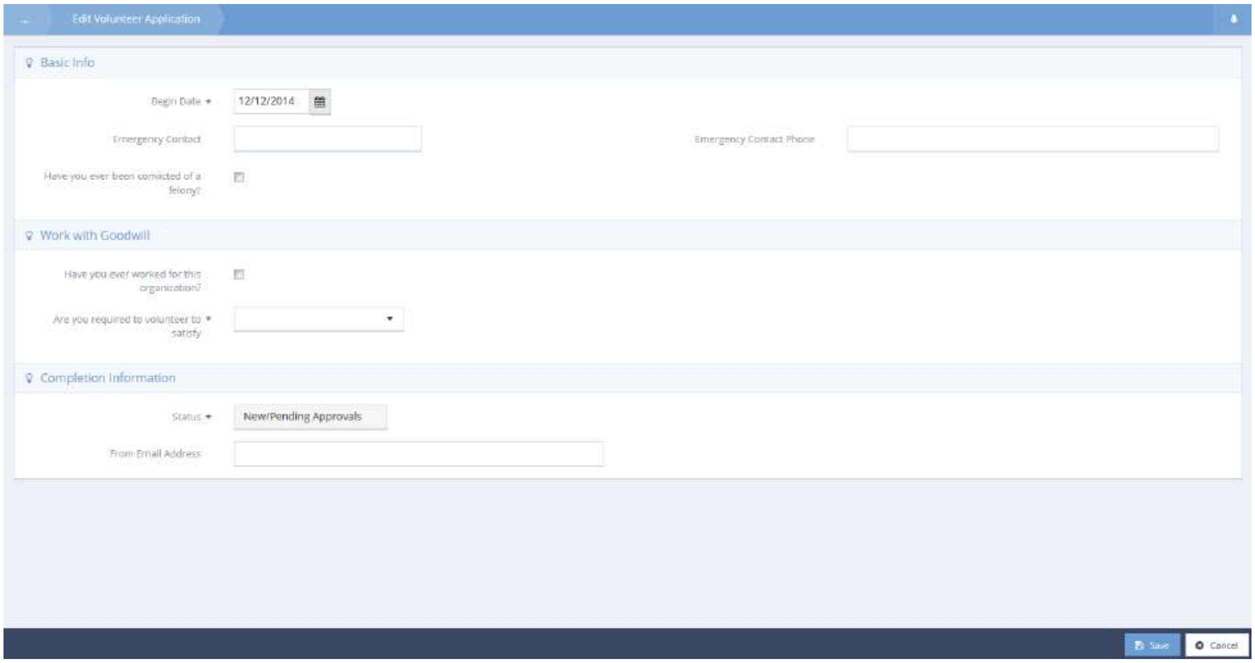
Click the Applications on Hold icon. The Volunteer Applications on Hold form displays.



To change the status on an application on hold, click the blue checkbox icon. The field expands. Select the new status from the drop-down list and click Save when finished.

GW – Volunteer Application

Objective: Start a new volunteer application.



Fill out all required info, click 

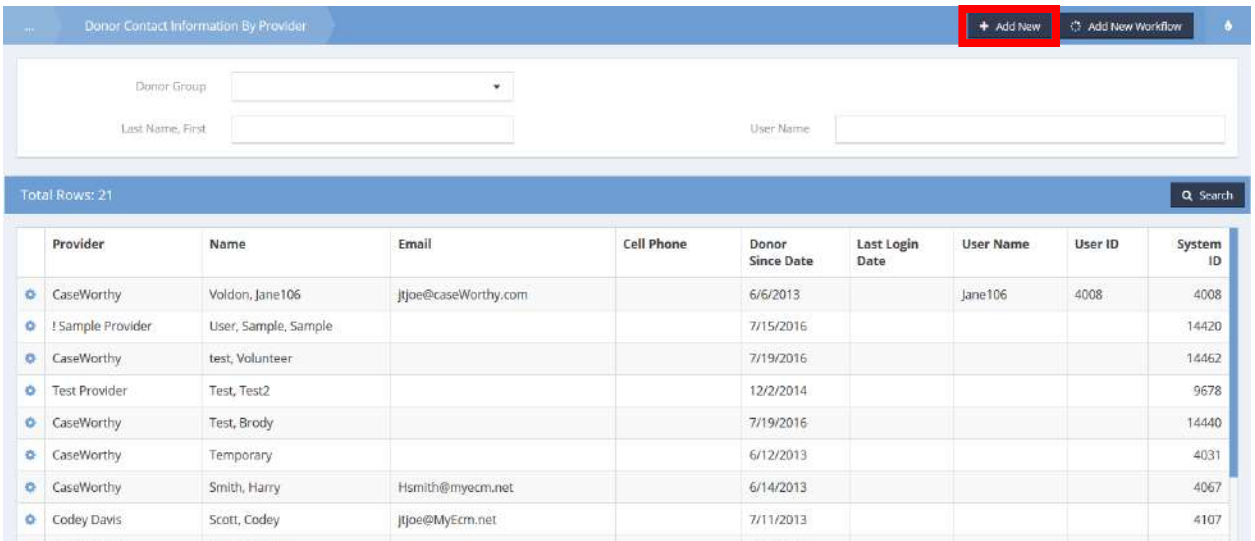
when finished.

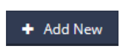
Donors

Find Donors

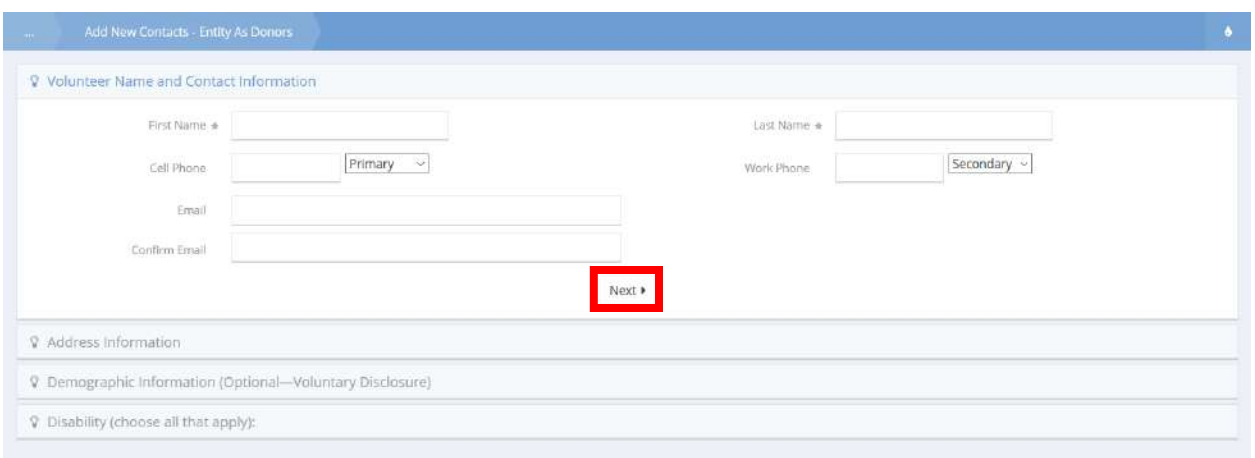
Objective: Add and view donor contact information.

Navigation: Organization>Donors>Find Donors



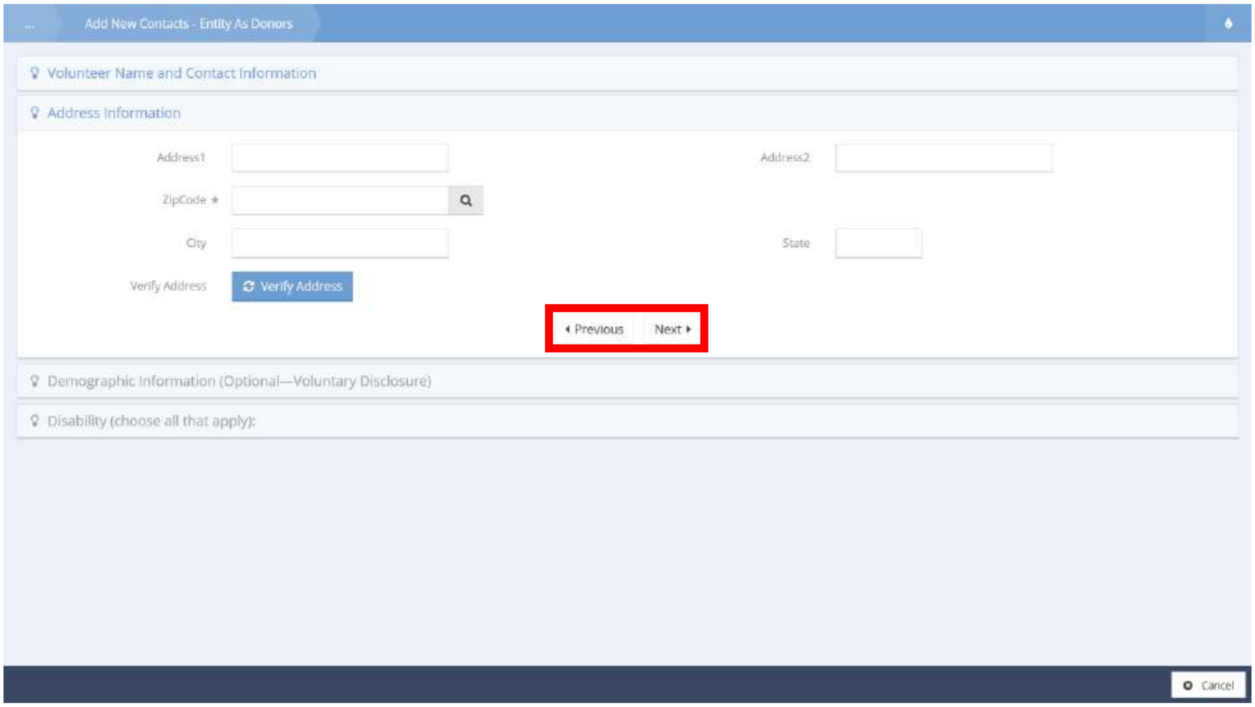
To add another contact entry, click the 

button. The Add New Contacts – Entity As Volunteer form displays.

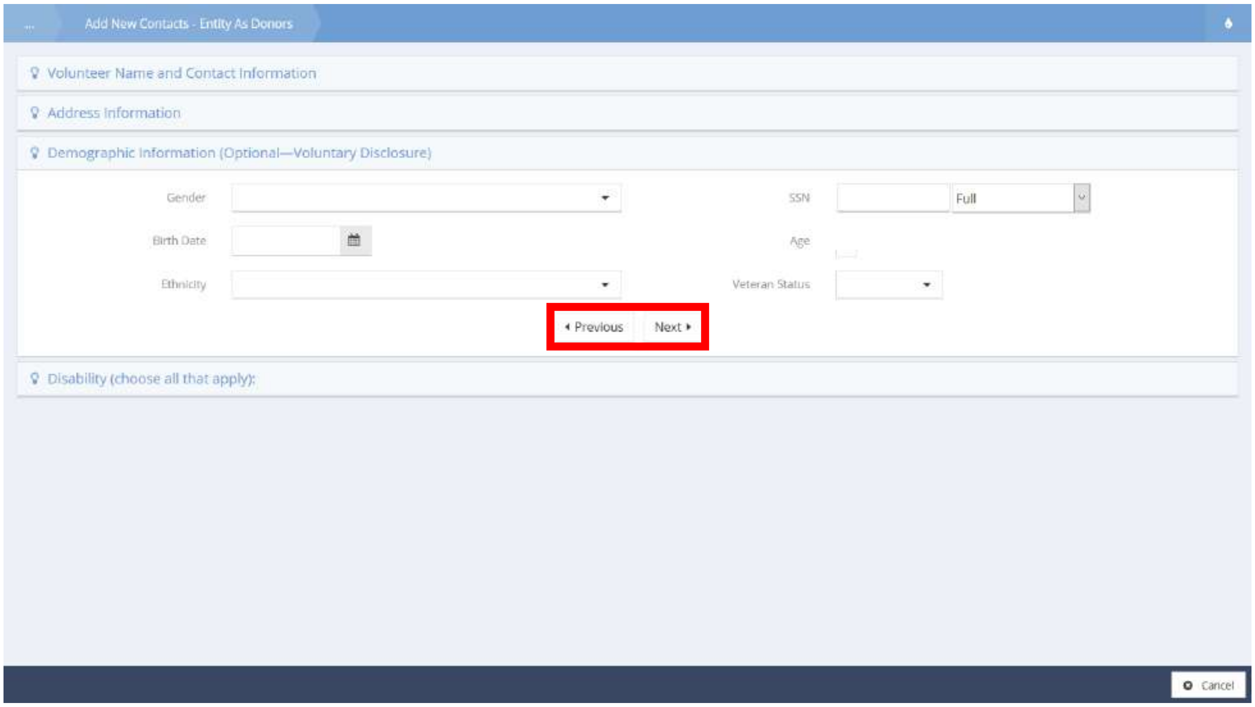


Enter information into the required fields: First Name and Last Name. Fill remaining fields as desired.

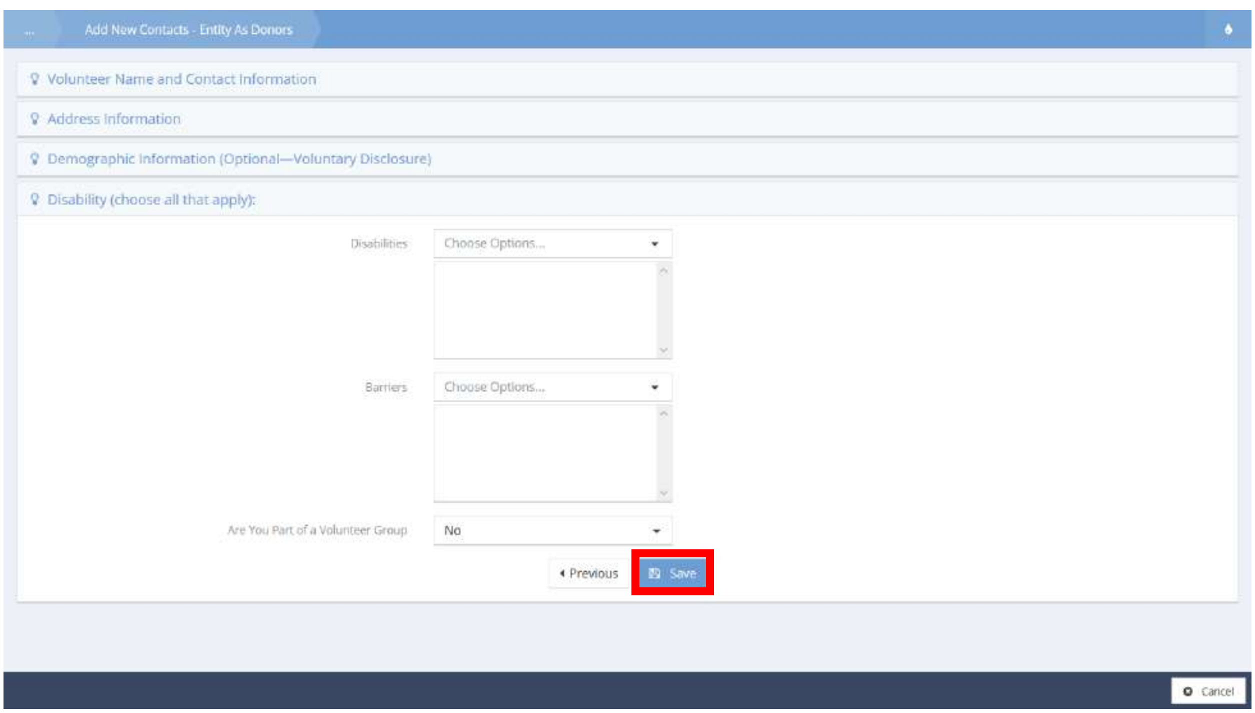
To move on to the next portion of the form and subsequent portions, click the Next ▸ button.



Enter information into the required field ZipCode. Fill remaining fields as desired. To navigate between portions of the form, click the ◂ Previous or Next ▸ button as applicable.



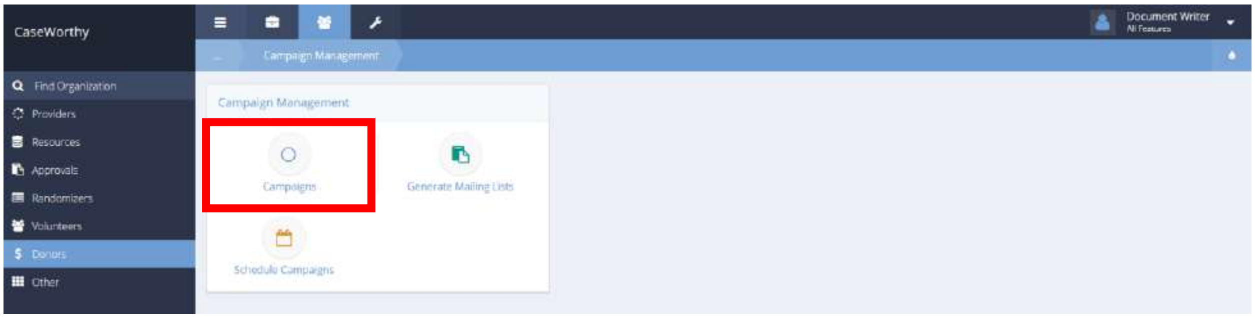
Fill fields as desired. Click the button to continue and the  button to finish.



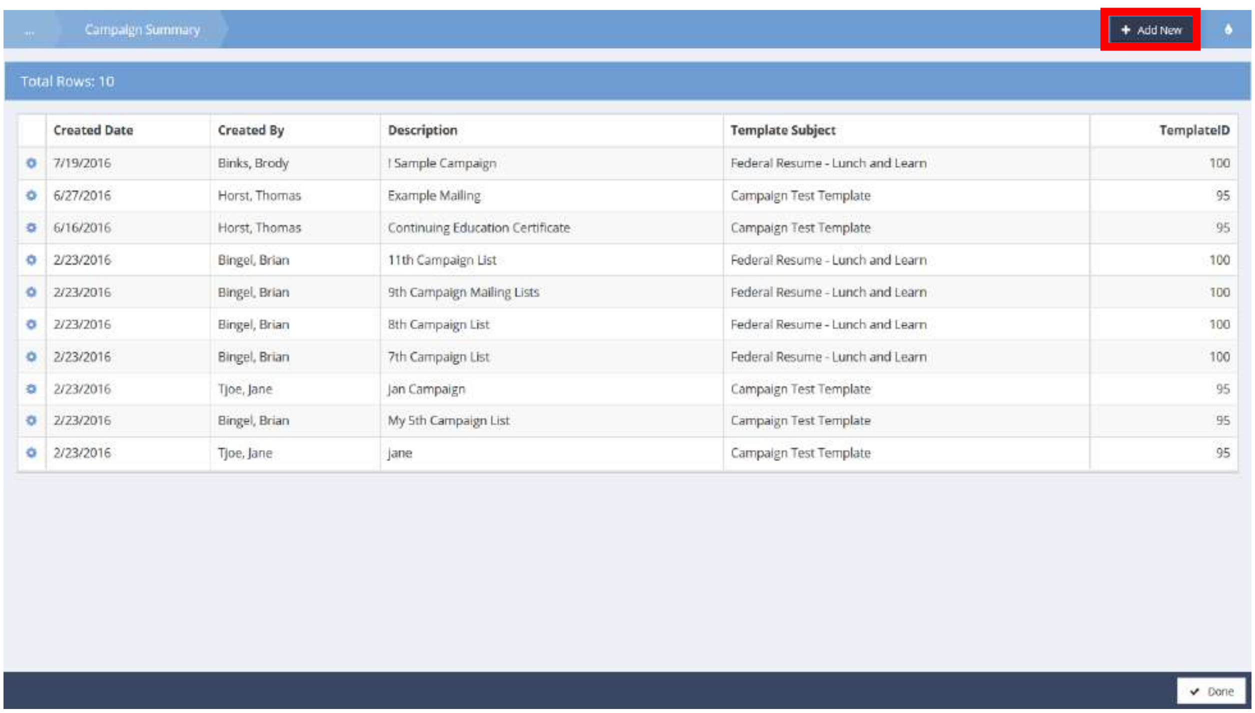
Campaign Management

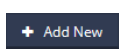
Objective: Add and mange new campaigns.

Navigation: Organization>Donors>Campaign Management

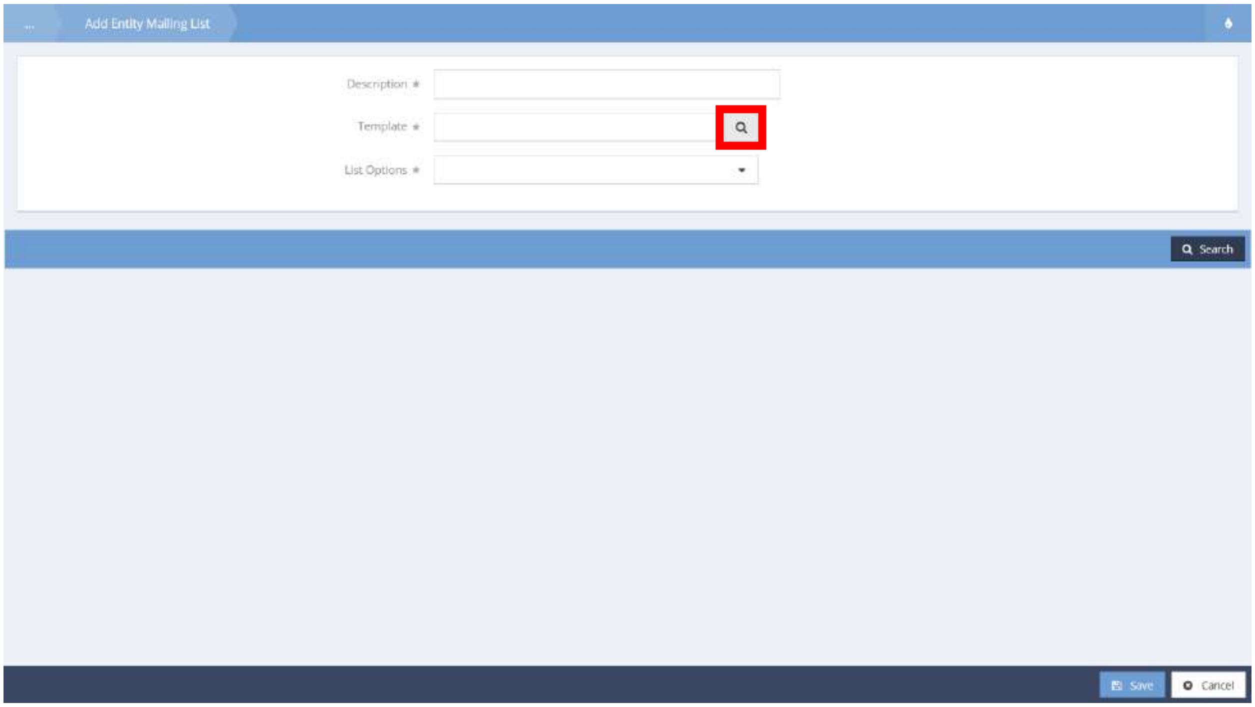


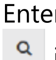
Select Campaign from the Campaign Management Dashboard. The Campaign Summary form displays.

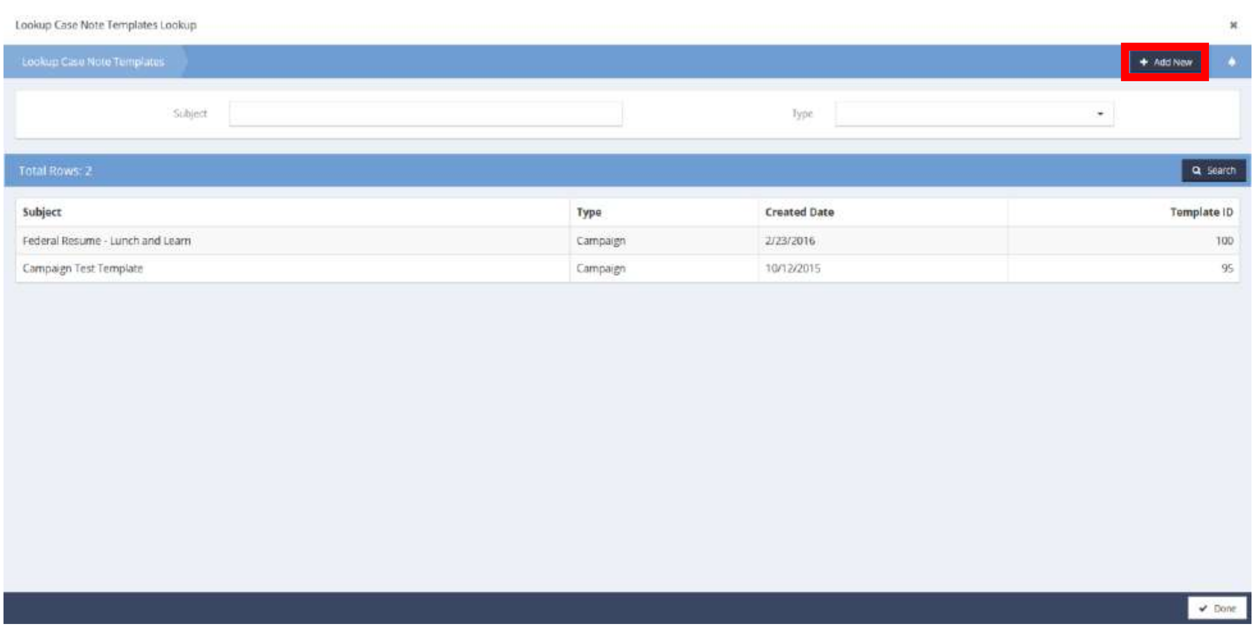


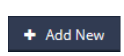
To add a new campaign, click the  button.

The Add Entity Mailing List form displays.



Enter information into all fields, as they are all required. To select a Template, click the magnifying glass  icon. The Lookup Case Note Templates form displays in a new pop-up window.

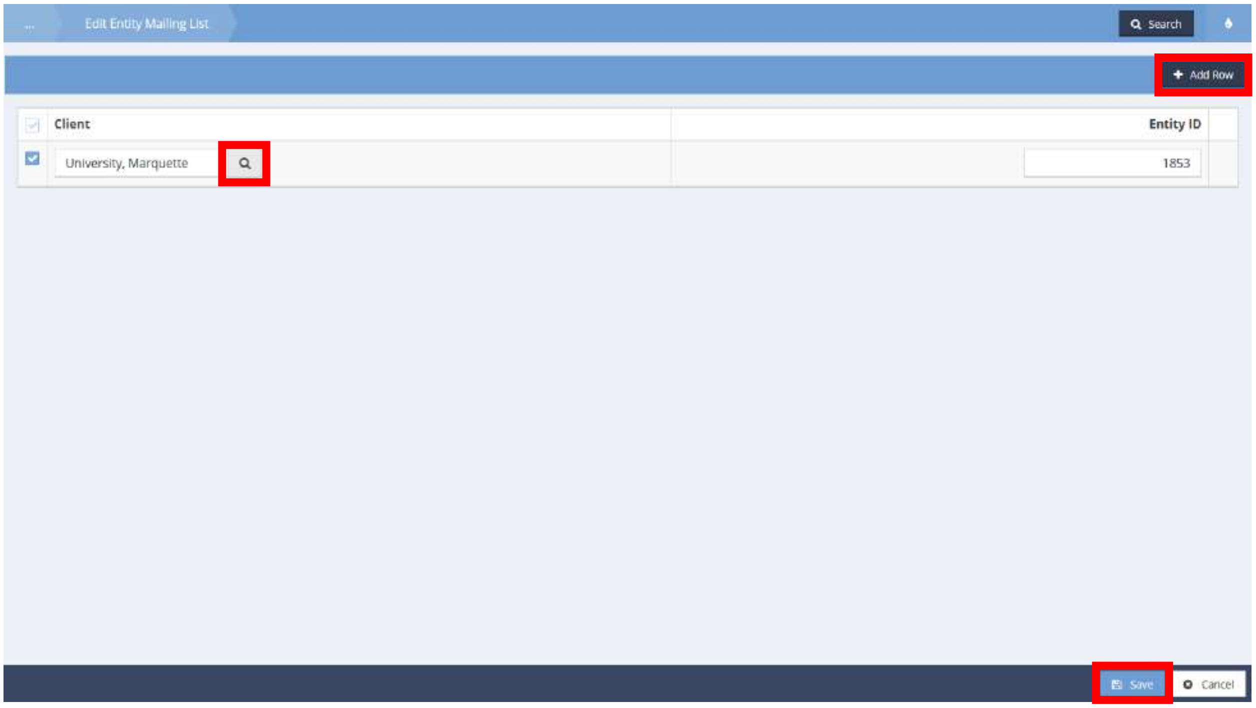


Search by Subject and/or Type. To add a new template, click the 

button. Click on the desired line to select. The form closes upon selection.

To edit an existing campaign, click the action gear icon associated with the desired campaign and select edit from the menu options.

The Edit Entity Mailing List displays.



Use the magnifying class icon to lookup a different client. Click the Add Row button to add a new client to the mailing list. Click the Save button to save and exit.

Other

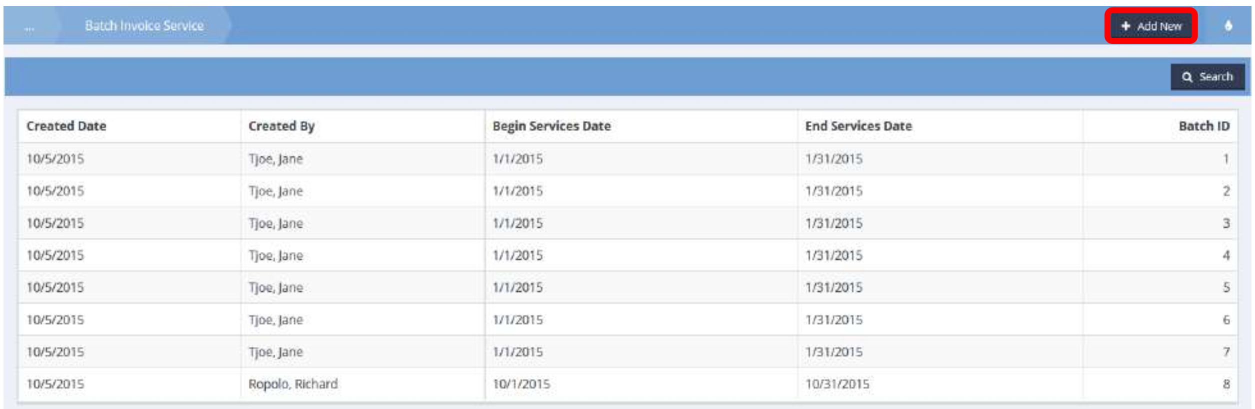
Batch Invoice Service

General Invoice Summary

Objective: View and create invoices on the batch level.

Navigation: Organization>Other>Batch Invoice Service

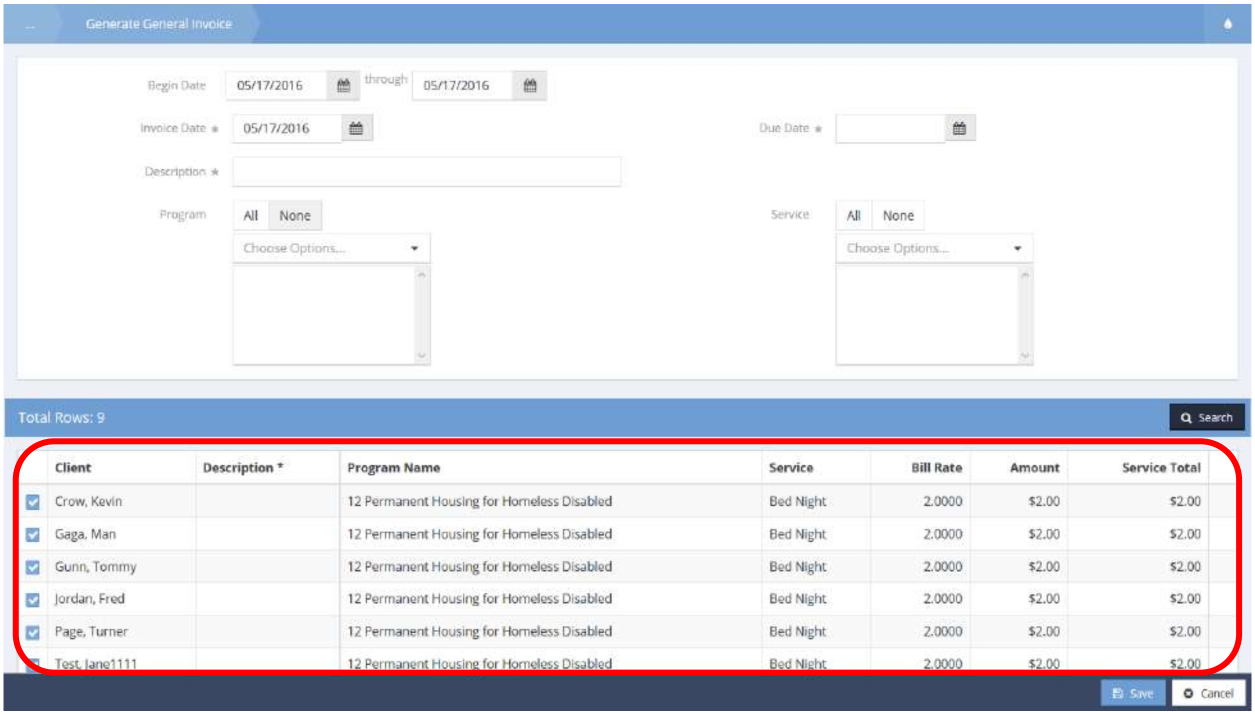
The Batch Invoice Service form displays.



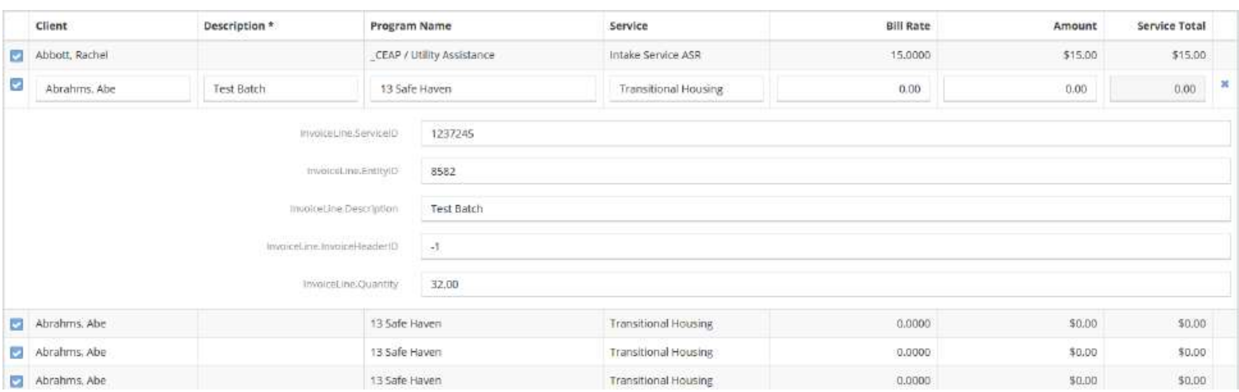
Created Date	Created By	Begin Services Date	End Services Date	Batch ID
10/5/2015	Tjoe, Jane	1/1/2015	1/31/2015	1
10/5/2015	Tjoe, Jane	1/1/2015	1/31/2015	2
10/5/2015	Tjoe, Jane	1/1/2015	1/31/2015	3
10/5/2015	Tjoe, Jane	1/1/2015	1/31/2015	4
10/5/2015	Tjoe, Jane	1/1/2015	1/31/2015	5
10/5/2015	Tjoe, Jane	1/1/2015	1/31/2015	6
10/5/2015	Tjoe, Jane	1/1/2015	1/31/2015	7
10/5/2015	Ropolo, Richard	10/1/2015	10/31/2015	8

This is a view only form, no edits can be made. To add a new invoice, simply click on the Add New button. The Generate General Invoice form displays.

Enter information into required fields: Invoice Date, Due Date, and Description. Select a desired program and service. Click the Search button to populate results of clients matching the date range and Program and Service selections.



A blue checkbox icon indicates selection. Click the blue checkbox icon to edit or delete from selection. The row expands.



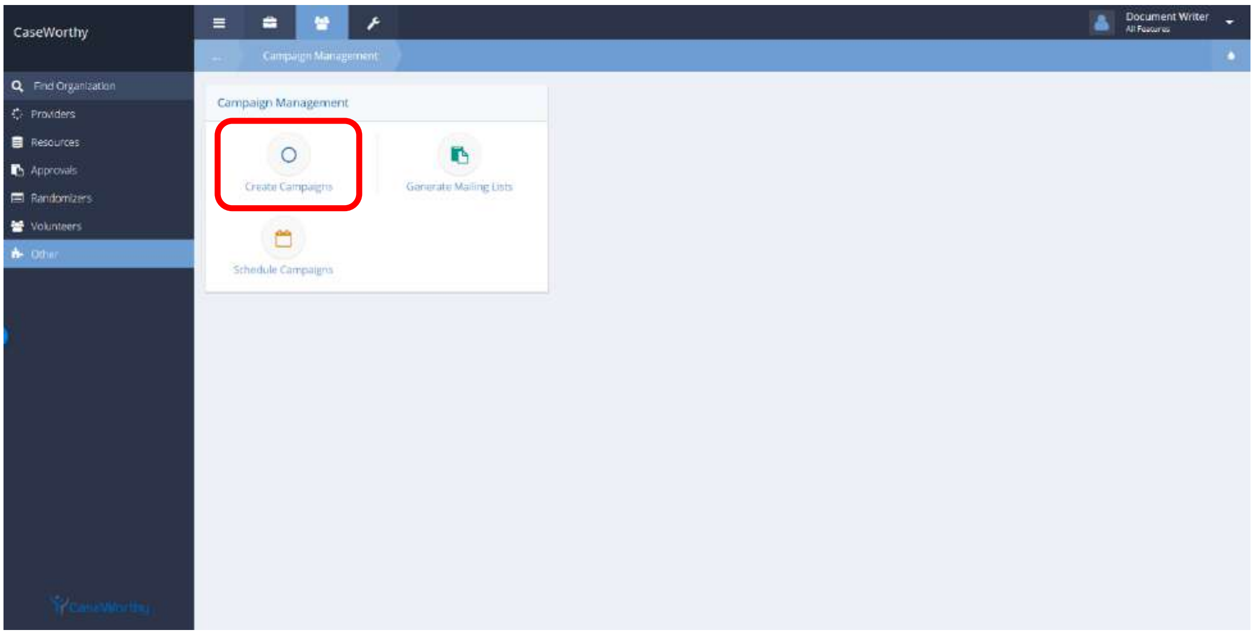
Enter information as desired. Click the Save button to save and exit.

Campaign Management

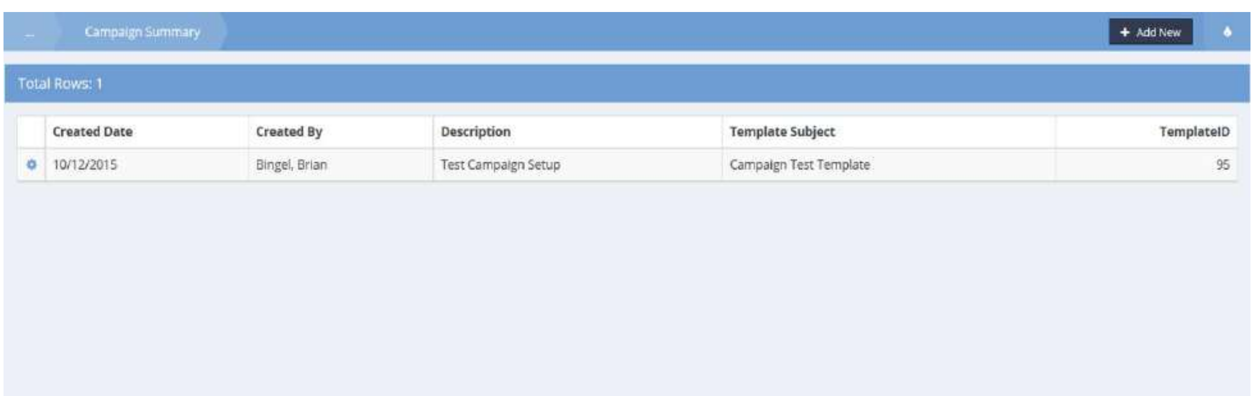
Create Campaigns

Objective: View existing campaigns.

Navigation: Organization>Other>Campaign Management

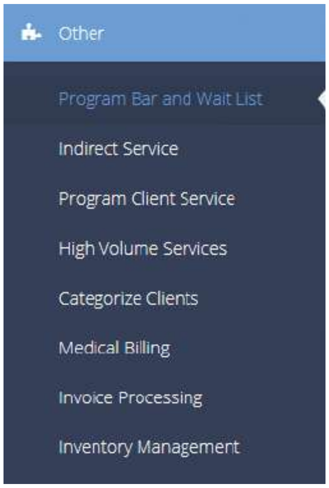


Select Create Campaigns from the Campaign Management portion of the Campaign Management dashboard. The Campaign Summary form displays.

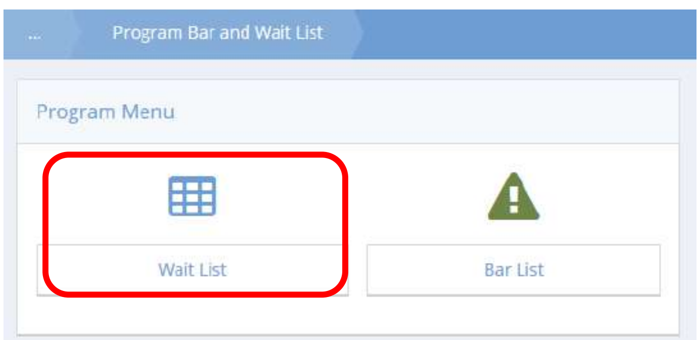


To edit or delete an entry click on the action gear icon and select the desired menu option. To add a new entry click on the Add New button. Click the Done button when finished.

Program Bar and Wait List

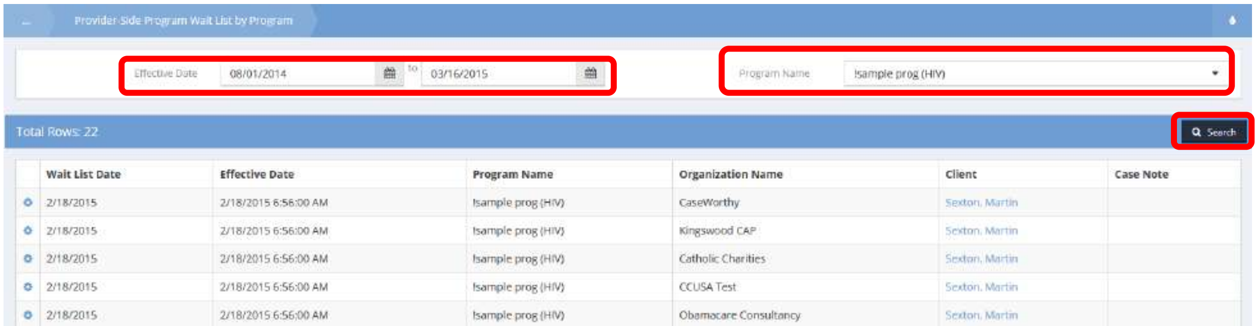


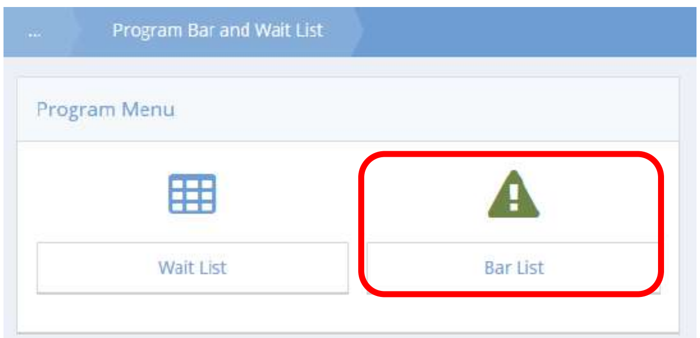
From this dashboard, the user can view all clients barred from programs and services in their organization, and all clients on a wait list in their organization.



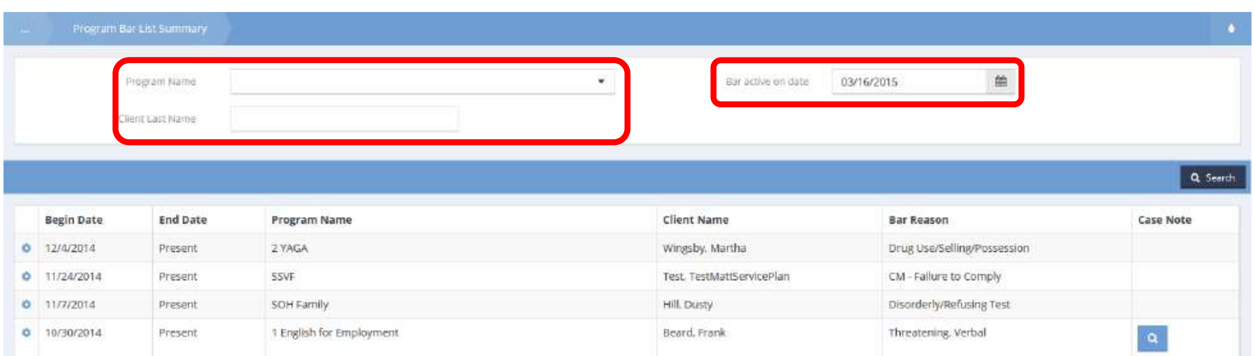
Clicking the "Wait List" icon opens a wait list search form.

Select the program and date range, then click Search for the clients that meet those criteria.

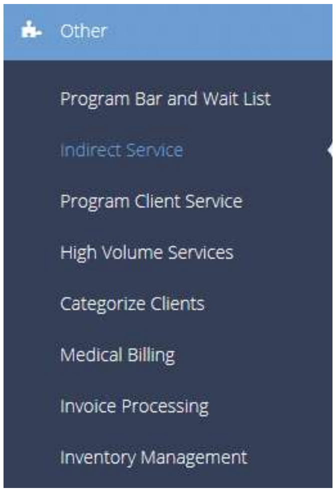




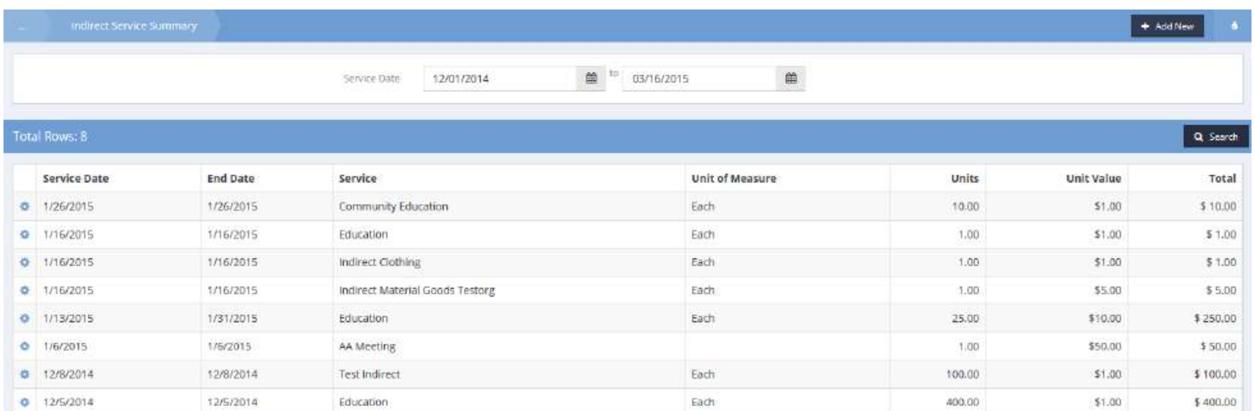
Clicking the "Bar List" icon opens the bar list summary form. Here the user can view any client bars related to their organization. The form can also be sorted by program, date or client last name.



Indirect Service

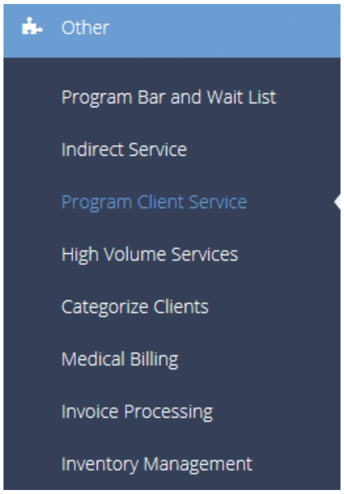


The next menu item in the Other menu group is the “Indirect Service” form. This functionality works similarly to the forms in the Case Management>My CaseWorthy area, except that it automatically assigns the services to the Indirect Service client.

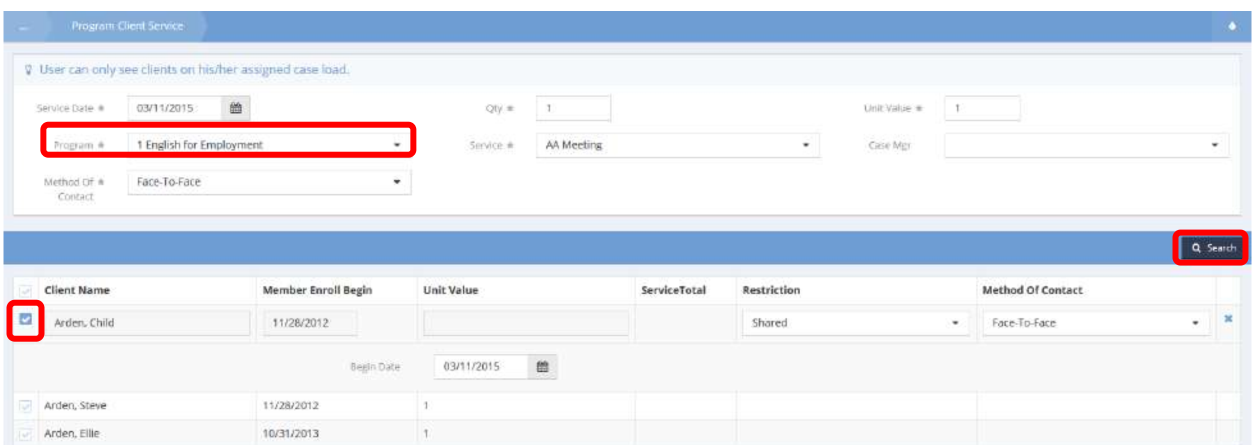


Service Date	End Date	Service	Unit of Measure	Units	Unit Value	Total
1/26/2015	1/26/2015	Community Education	Each	10.00	$1.00	$ 10.00
1/16/2015	1/16/2015	Education	Each	1.00	$1.00	$ 1.00
1/16/2015	1/16/2015	Indirect Clothing	Each	1.00	$1.00	$ 1.00
1/16/2015	1/16/2015	Indirect Material Goods Testorg	Each	1.00	$5.00	$ 5.00
1/13/2015	1/31/2015	Education	Each	25.00	$10.00	$ 250.00
1/6/2015	1/6/2015	AA Meeting		1.00	$50.00	$ 50.00
12/8/2014	12/8/2014	Test Indirect	Each	100.00	$1.00	$ 100.00
12/5/2014	12/5/2014	Education	Each	400.00	$1.00	$ 400.00

Program Client Service

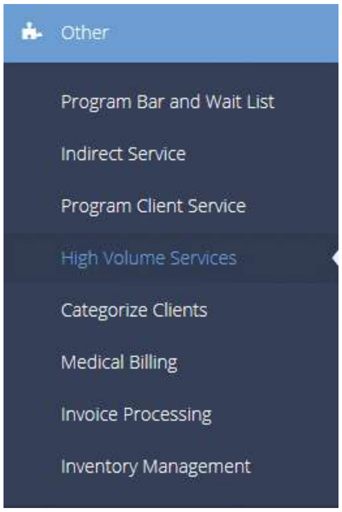


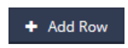
The next menu item in the Other menu group is the "Program Client Service" form. This form allows the user to provide a service to multiple clients in a program at the same time. Select a program and service, then click Search for a list of eligible clients. Click the clear checkbox next to the client's name to provide the select service to them.



High Volume Services

Objective: Add services to a program with high volume.



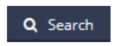
On the Add Services for High Volume Program form, enter a service date and choose a program and service. Optionally choose a method of contact. Click the 

button.

A new, expanded row appears on the form.

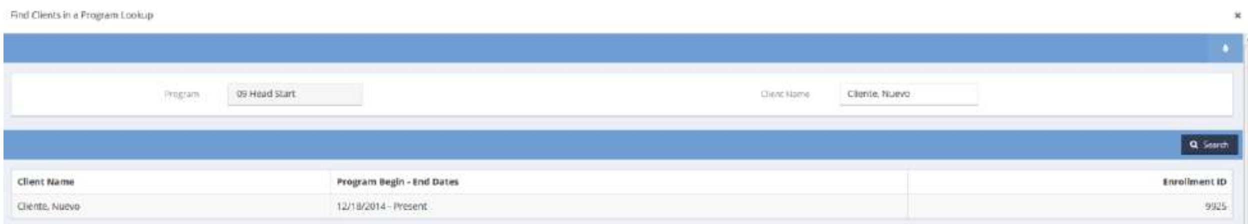
Click the magnifying glass  icon to look up a client.

The Find Clients in a Program form displays.

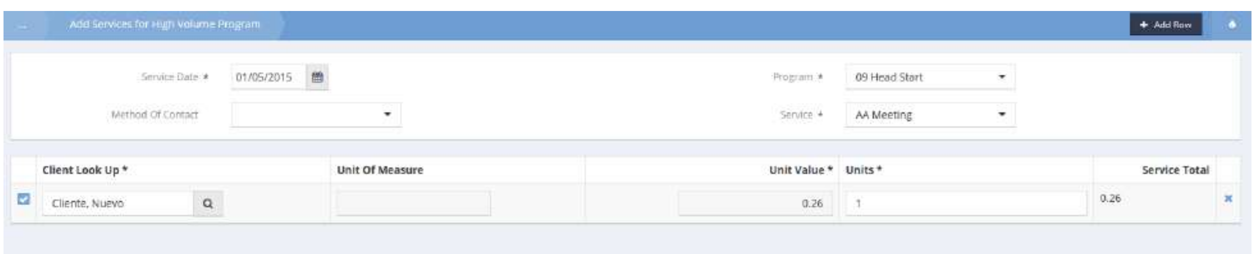
Enter any or all of the client's name and click on the 

button.

A list of matching clients appears.



Select the client from the results. The Add Services for High Volume Program form displays with client name in the new row.

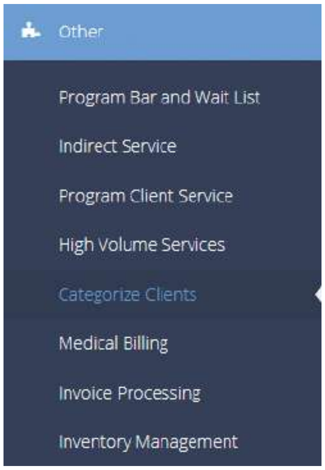


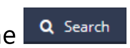
Add as many clients as desired by repeating the process. Click 

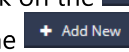
when finished.

Categorize Clients

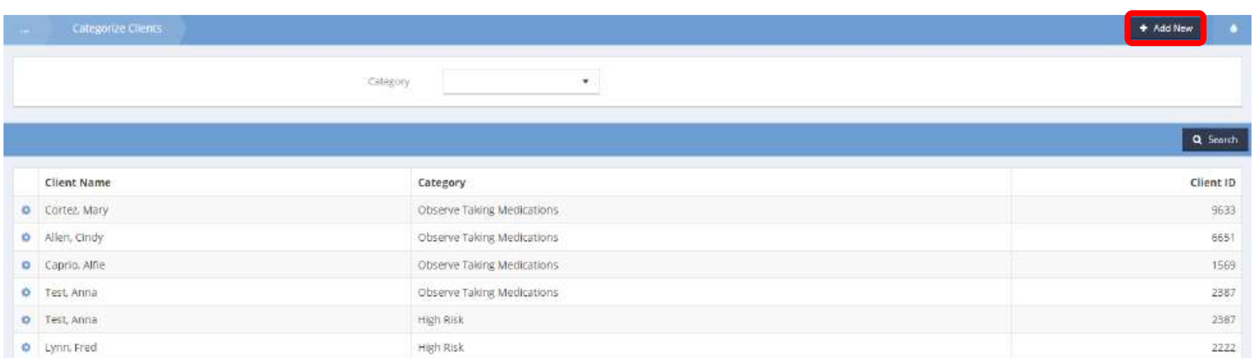
Objective: Categorize clients, edit client categories, and find clients in a program.



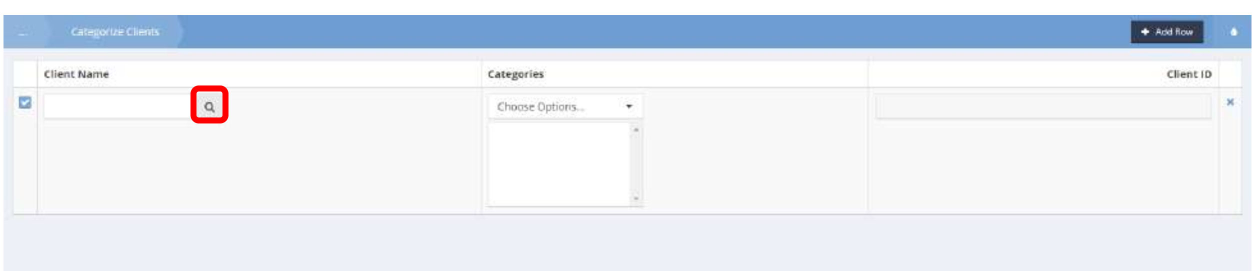
On the Categorize Clients form, choose a category from the drop-down list and click on the 

button. The list of clients in that category appears. To add a client to the list, click the 

button.



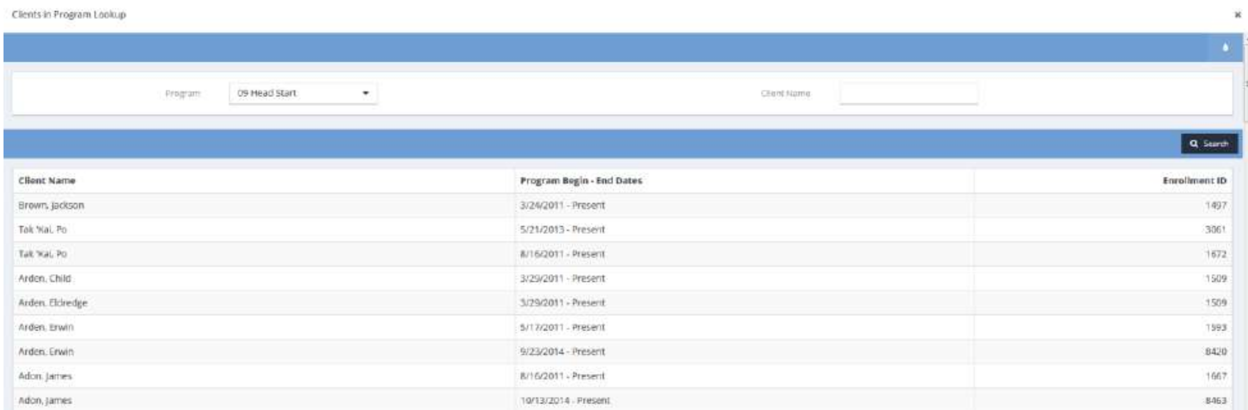
The list closes and an expanded row appears.



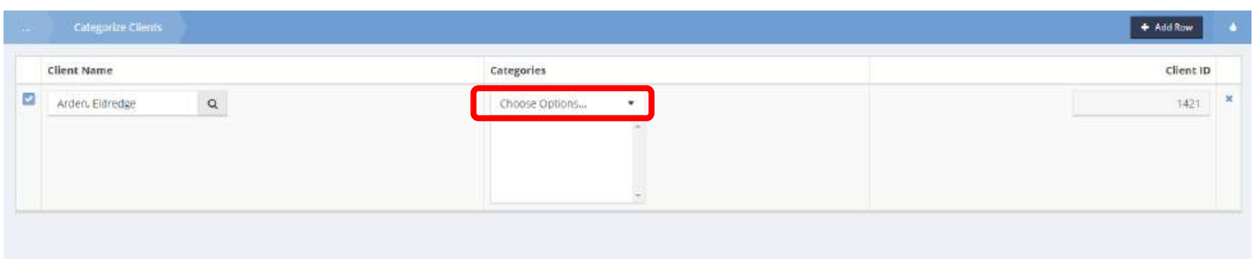
Click the magnifying glass icon. The Clients in Program Lookup form displays.

Select a program from the drop-down list and enter a name if desired. Click on the Search button.

Results display in the space below the search parameters.



Select a client by clicking on the associated row. The Categorize Clients form appears again with the client name.

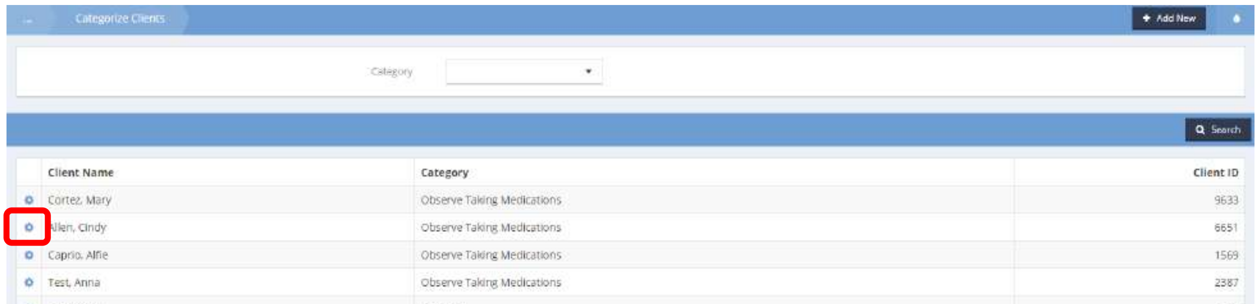


Click on the down arrow icon for the Categories field and select any desired categories from the drop-down list that appears by clicking on the clear checkbox associated with them. Click on the Add Selected button. Click Save when finished.

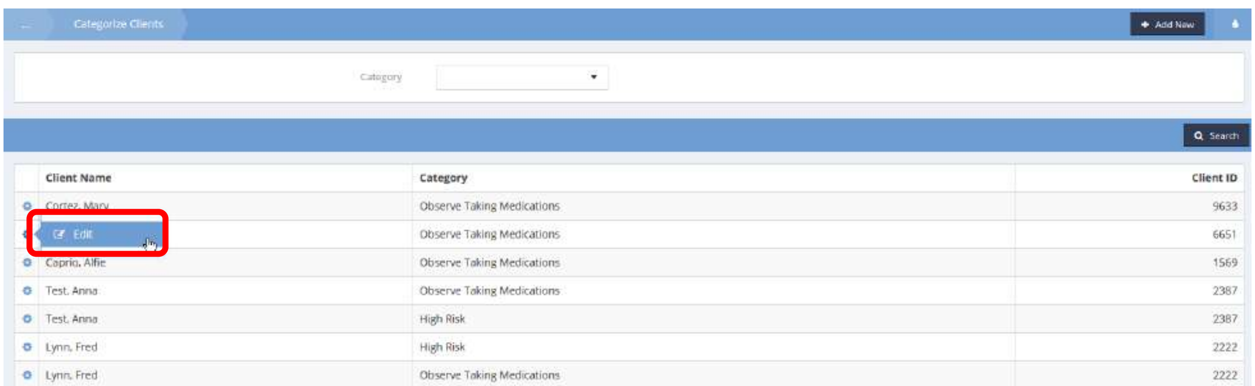
Edit Client Categories

Objective: Edit categories associated with a client.

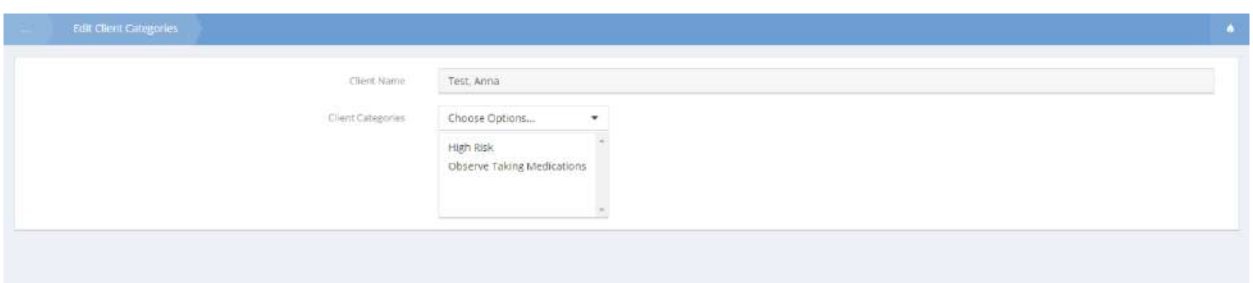
On the Categorize Clients form, click the action gear icon associated with the desired client.



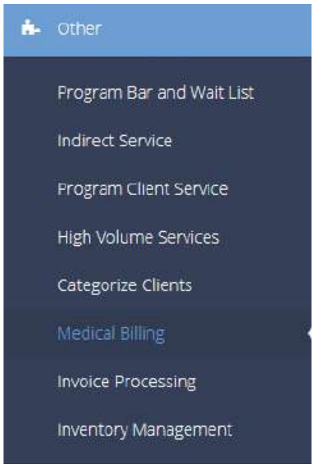
Select Edit from the pop up menu that appears.



The Edit Client Categories form displays. Make any changes and click on the Save button.

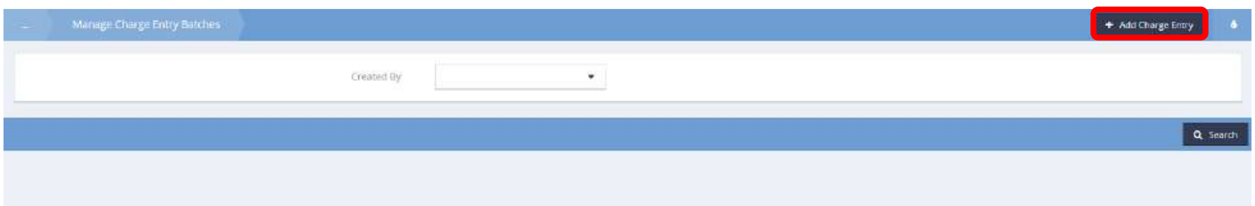


Medical Billing

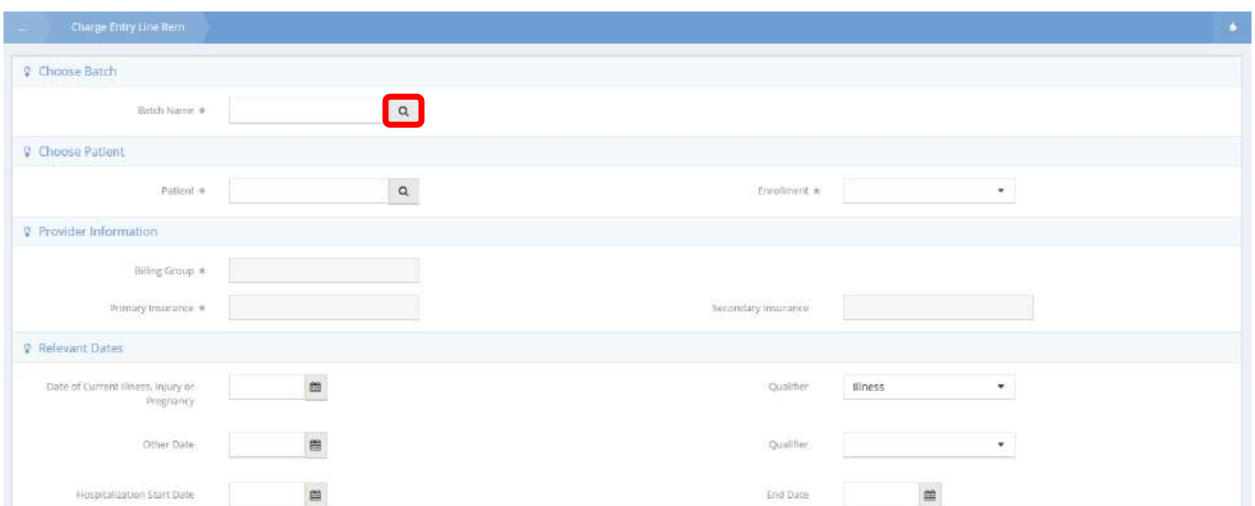


Manage Charge Entry Batches

Objective: Manage medical billing charge entry batches.

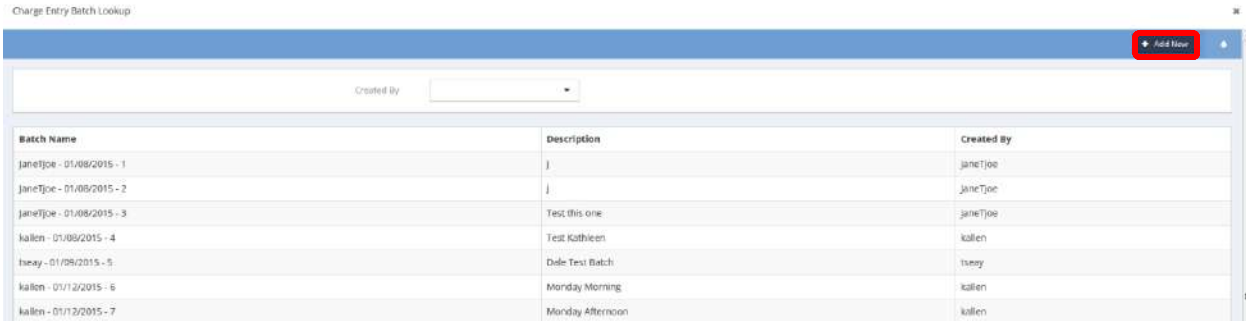


Click the Add Charge Entry button. The Charge Entry Line Item form displays.



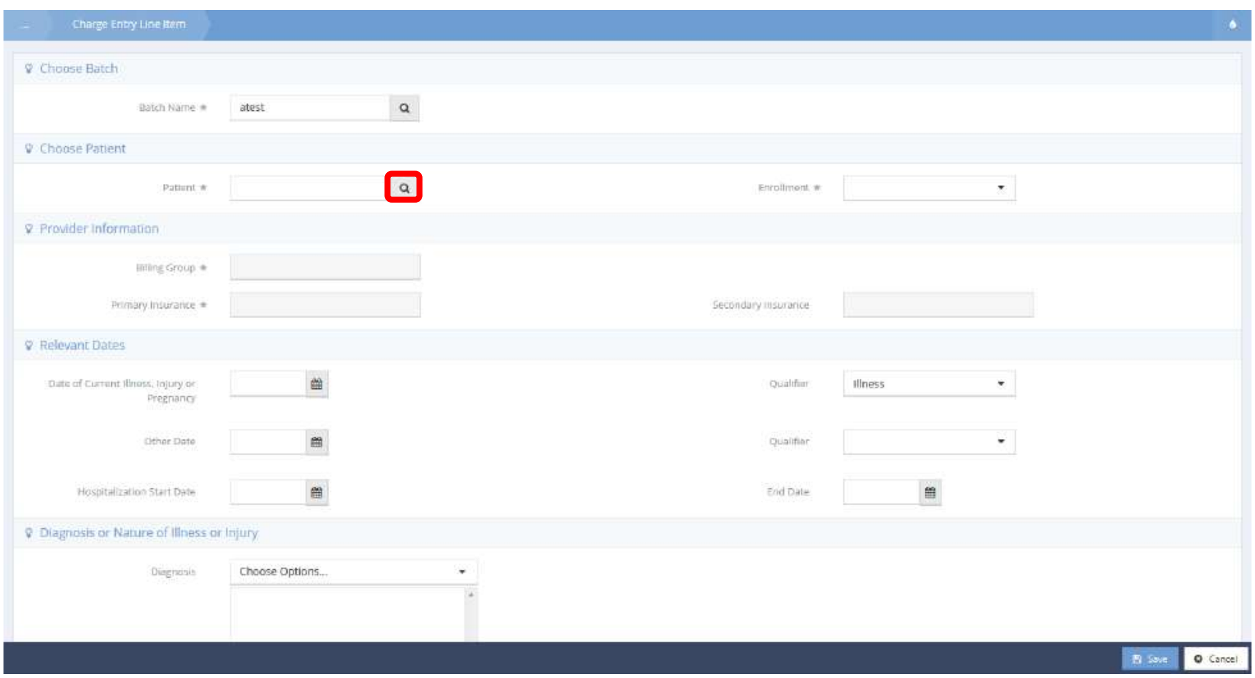
Click the magnifying glass icon to choose a batch.

The Charge Entry Batch Lookup displays.



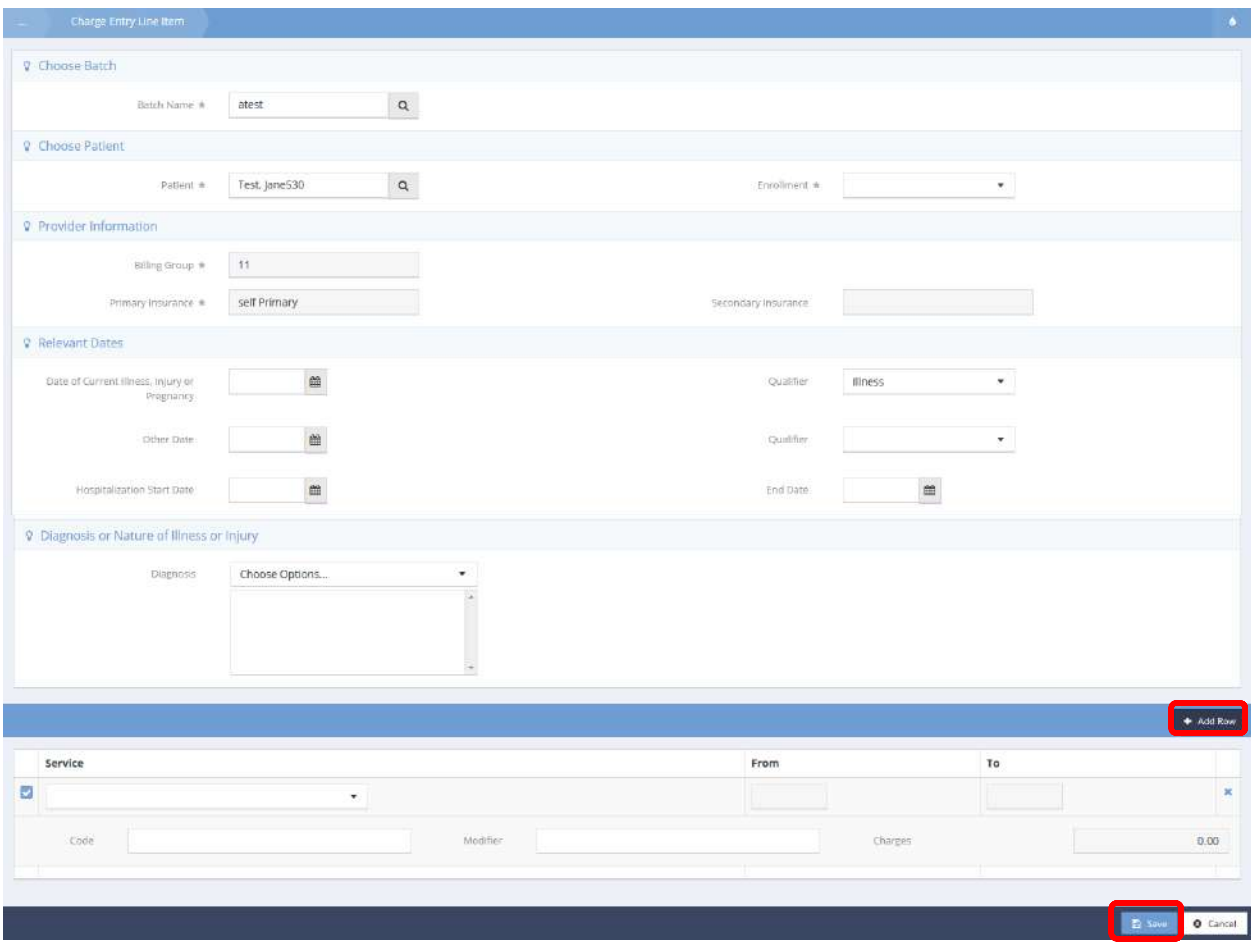
To find an existing batch, use the Created By drop-down list to filter the list. Click the desired batch when located. To create a new batch, click the Add New button. The ChargeEntryBatch Add form displays.

Simply enter a description and click on the Save button. The Charge Entry Line Item form displays.



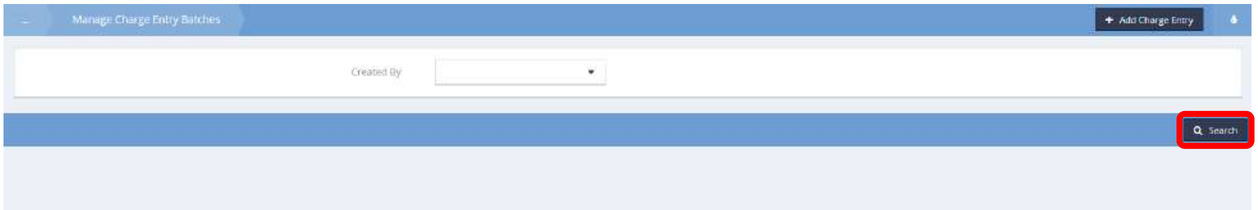
Click the magnifying glass icon to choose a patient. The Find Client Lookup form displays.

Enter any known client info and click on the Search button. Select the desired client from the results displayed below. The Charge Entry Line Item form displays.

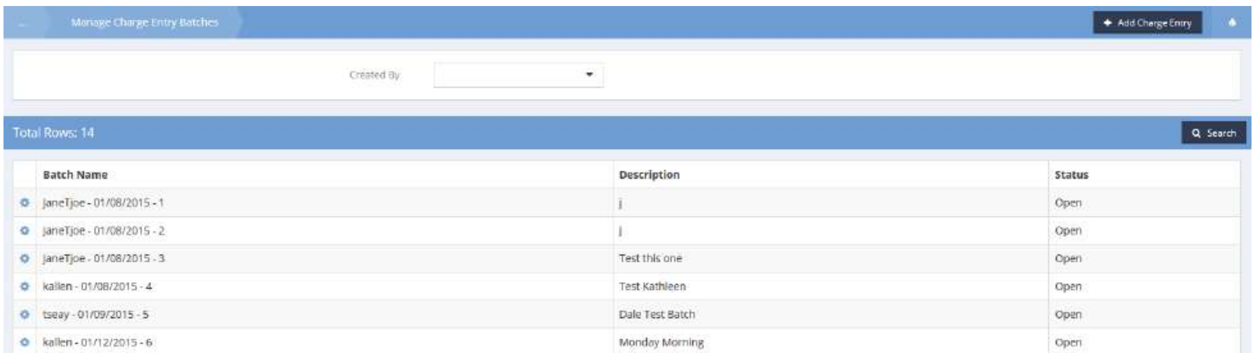


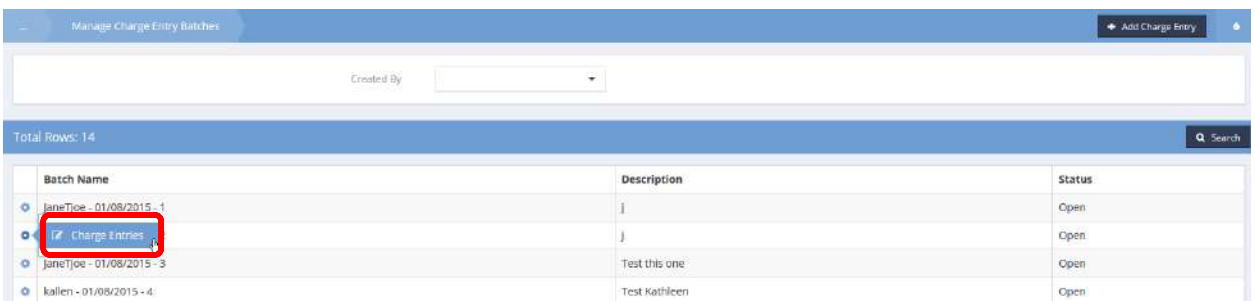
Select an enrollment and fill out any other fields. Click Add Row if an additional line item is needed. Click Save when finished.

The Manage Charge Entry Batches form displays.

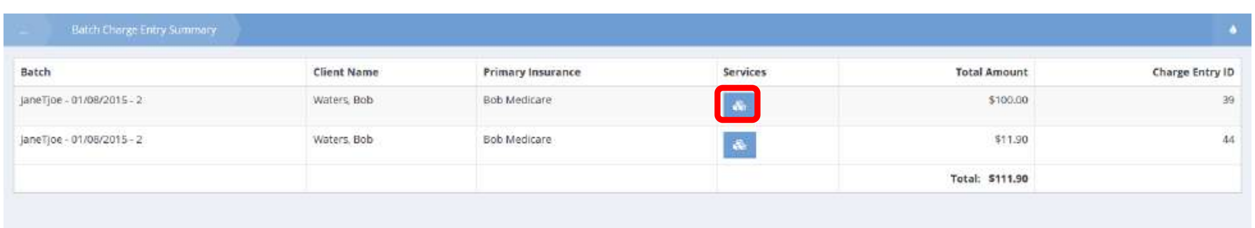


To view existing batches, use the Created By drop-down list to filter and click the Search button.





Click the action gear and click Charge Entries. The Batch Charge Entry Summary form displays.



To view services, click the icon. The Charge Entry Services form displays.

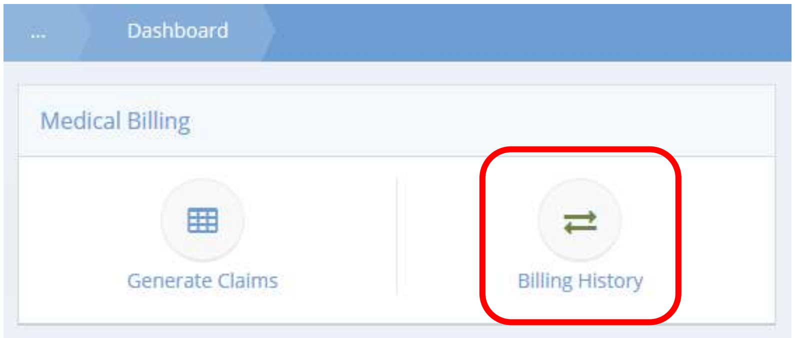
Service	From	To	CPT Code	Modifier	Charges
Therapeutic, Prophylactic or Diagnostic Injection	1/12/2015	1/12/2015	90772	AU	$11.90
					Total: $11.90

Click Done when finished viewing.

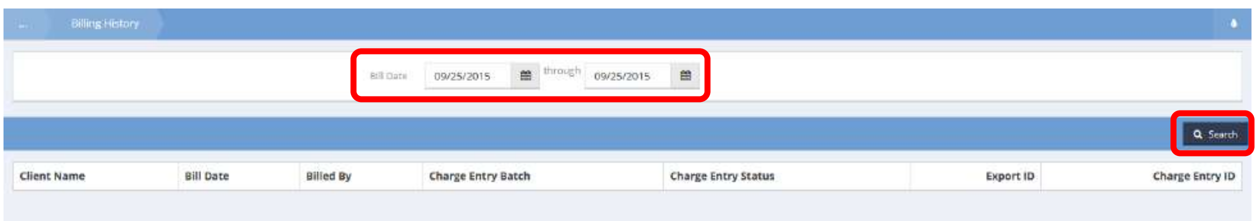
Billing History

Objective: View organization medical billing history.

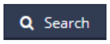
Navigation: Organization>Other>Medical Billing



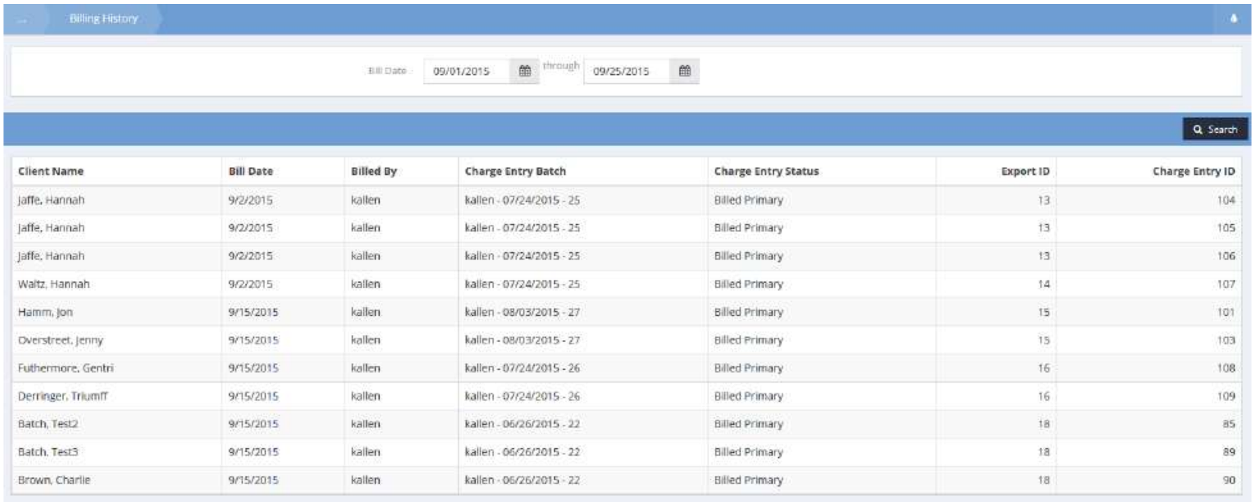
Click the icon for Billing History. The Billing History form displays.



Select a date range and click the Search button.

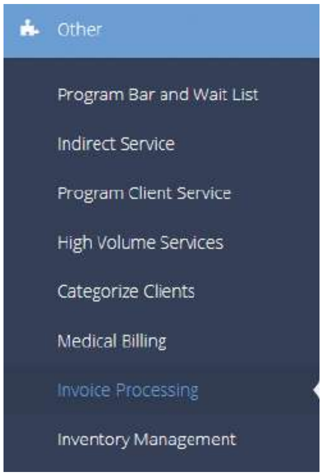
Billed items display below the 

button.



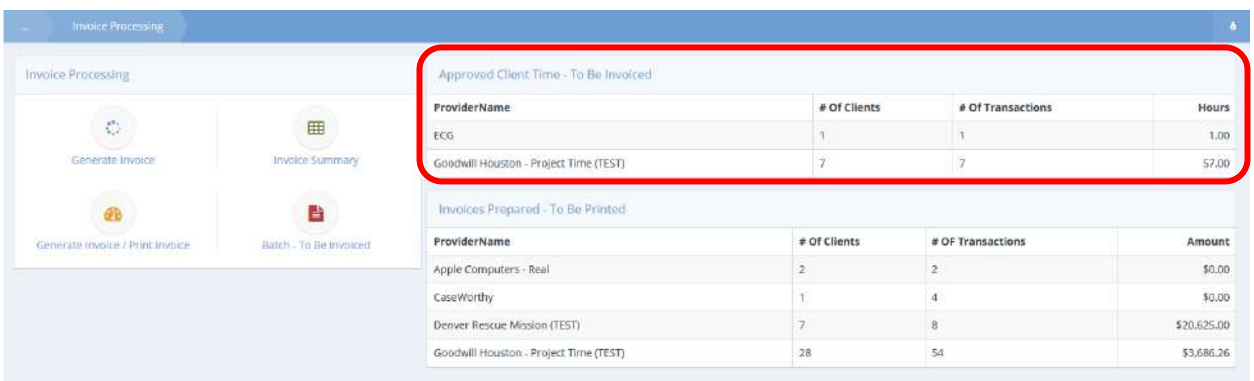
Client Name	Bill Date	Billed By	Charge Entry Batch	Charge Entry Status	Export ID	Charge Entry ID
Jaffe, Hannah	9/2/2015	kallen	kallen - 07/24/2015 - 25	Billed Primary	13	104
Jaffe, Hannah	9/2/2015	kallen	kallen - 07/24/2015 - 25	Billed Primary	13	105
Jaffe, Hannah	9/2/2015	kallen	kallen - 07/24/2015 - 25	Billed Primary	13	106
Waltz, Hannah	9/2/2015	kallen	kallen - 07/24/2015 - 25	Billed Primary	14	107
Hamm, Jon	9/15/2015	kallen	kallen - 08/03/2015 - 27	Billed Primary	15	101
Overstreet, Jenny	9/15/2015	kallen	kallen - 08/03/2015 - 27	Billed Primary	15	103
Futhermore, Gentri	9/15/2015	kallen	kallen - 07/24/2015 - 26	Billed Primary	16	108
Derringer, Triumff	9/15/2015	kallen	kallen - 07/24/2015 - 26	Billed Primary	16	109
Batch, Test2	9/15/2015	kallen	kallen - 06/26/2015 - 22	Billed Primary	18	85
Batch, Test3	9/15/2015	kallen	kallen - 06/26/2015 - 22	Billed Primary	18	89
Brown, Charlie	9/15/2015	kallen	kallen - 06/26/2015 - 22	Billed Primary	18	90

Invoice Processing



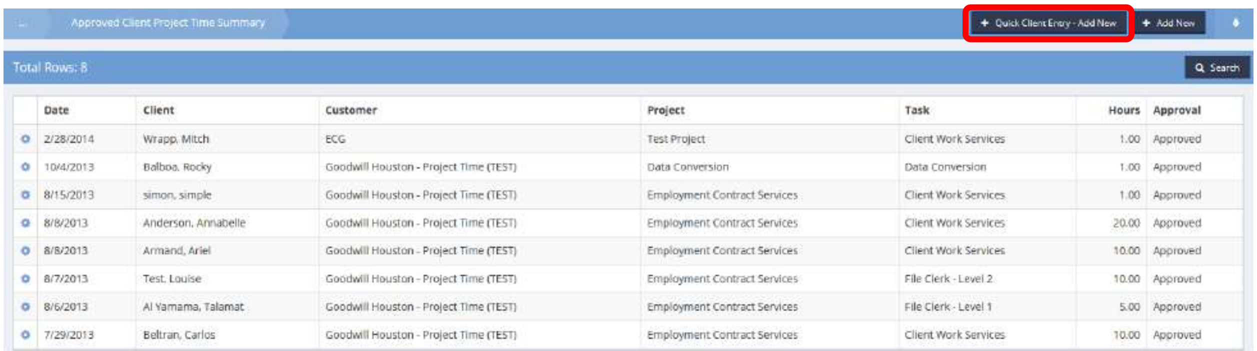
Use this area to generate invoices related to Client Project Time entry. Refer to the Client Project Time Entry section of this manual for more information on how to enter the data necessary to generate invoices. Once the time data has been entered, navigate to Organization>Other>Invoice Processing

Approved Client Time – To Be Invoiced



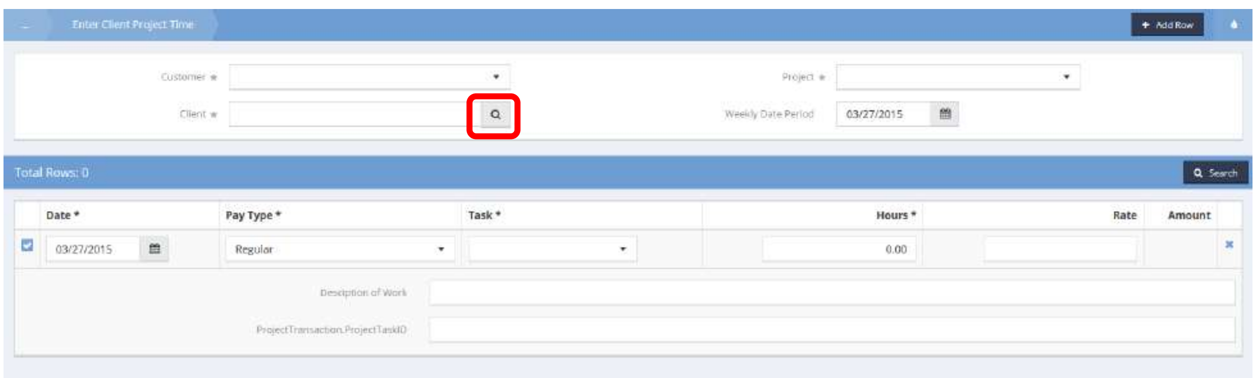
Locate the Approved Client Time – To Be Invoiced query table and select the desired entry by clicking on it.

The Approved Client Project Time Summary form displays.



Date	Client	Customer	Project	Task	Hours	Approval
2/28/2014	Wrapp, Mitch	ECG	Test Project	Client Work Services	1.00	Approved
10/4/2013	Balboa, Rocky	Goodwill Houston - Project Time (TEST)	Data Conversion	Data Conversion	1.00	Approved
8/15/2013	simon, simple	Goodwill Houston - Project Time (TEST)	Employment Contract Services	Client Work Services	1.00	Approved
8/8/2013	Anderson, Annabelle	Goodwill Houston - Project Time (TEST)	Employment Contract Services	Client Work Services	20.00	Approved
8/8/2013	Armand, Ariel	Goodwill Houston - Project Time (TEST)	Employment Contract Services	Client Work Services	10.00	Approved
8/7/2013	Test, Louise	Goodwill Houston - Project Time (TEST)	Employment Contract Services	File Clerk - Level 2	10.00	Approved
8/6/2013	Al Yamama, Talamat	Goodwill Houston - Project Time (TEST)	Employment Contract Services	File Clerk - Level 1	5.00	Approved
7/29/2013	Beltran, Carlos	Goodwill Houston - Project Time (TEST)	Employment Contract Services	Client Work Services	10.00	Approved

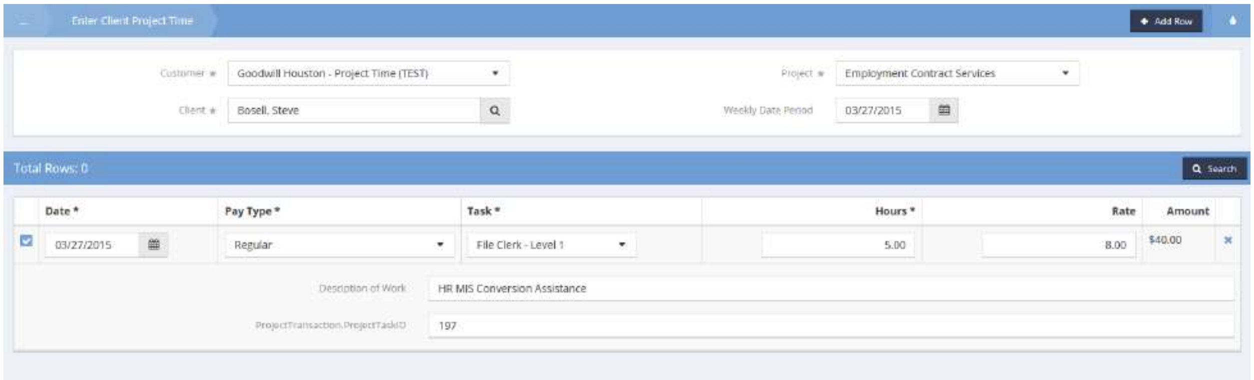
Click on the **+ Quick Client Entry - Add New** button. The Enter Client Project Time form displays.



Select the Client by clicking on the magnifying glass icon. The Find Client Lookup form displays.

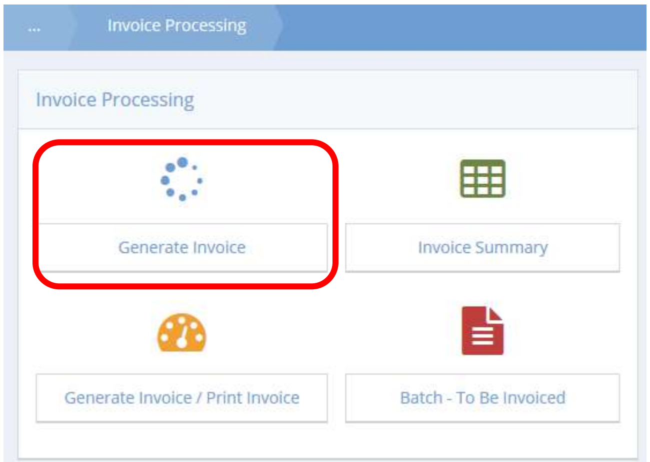
Enter the desired lookup information and click on the **Search** button.

Select the desired client from the list presented in the form. Enter the Customer, Project and Task from the drop-down lists and enter the Description of Work. Click on the  button.

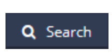


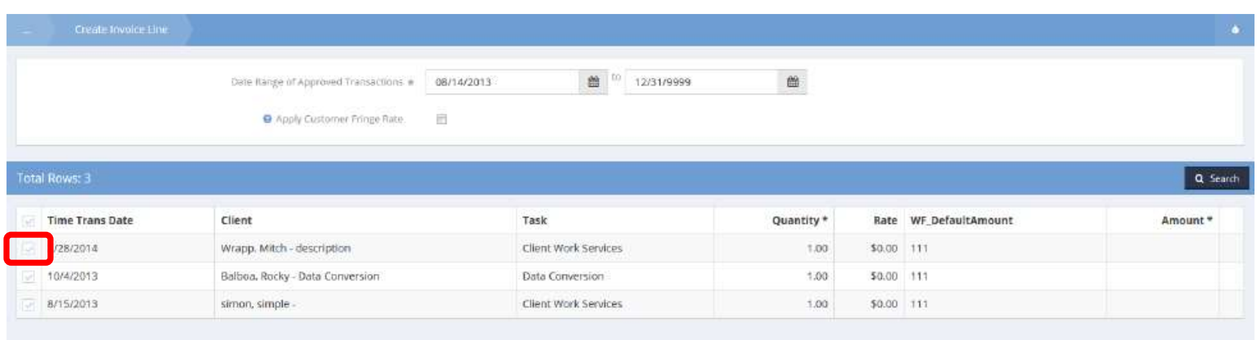
Generate All Invoice

Click the icon for Generate Invoice.



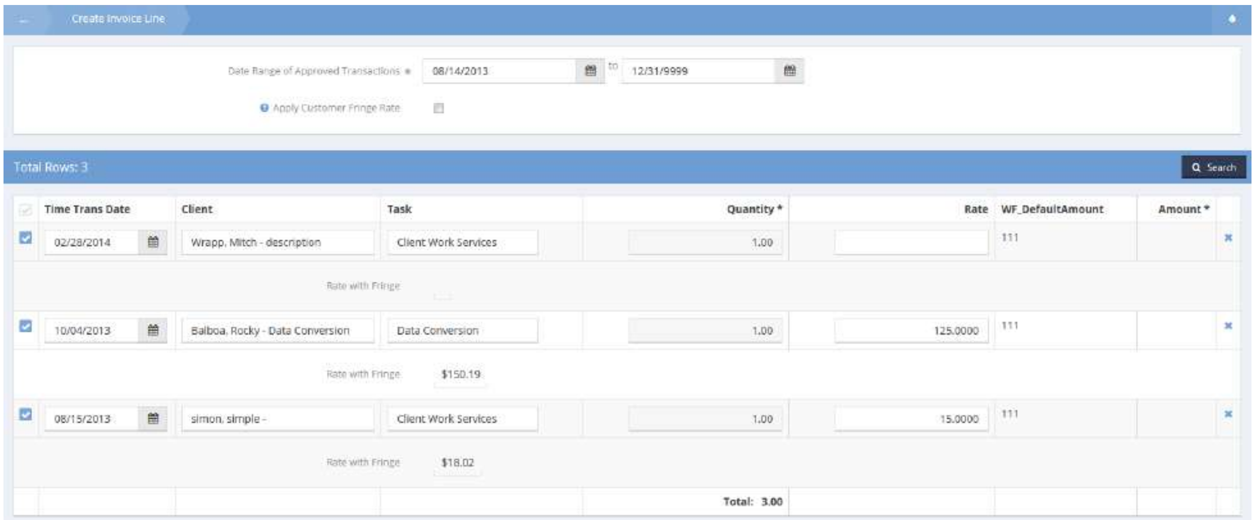
The Invoice Line (Create) page displays.

After supplying a date range, click  to display the records to be processed.

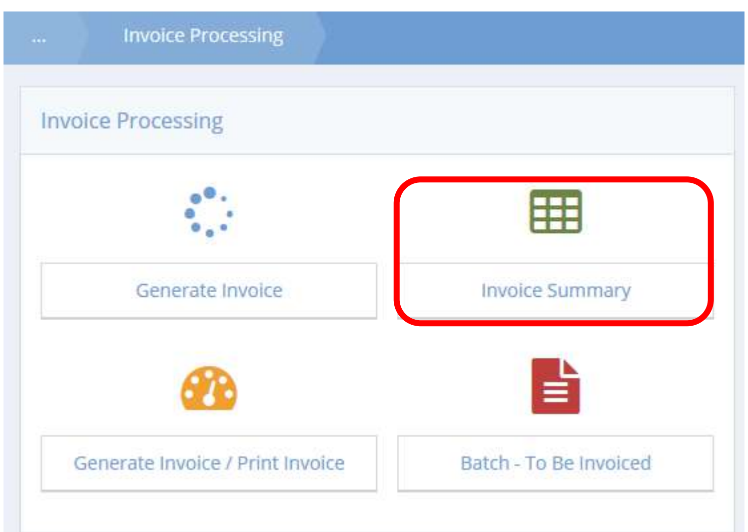


Select all desired records by clicking on the clear checkbox at the left of each record. Click in the task field and press Tab for each line. The Amount field populates with the extrapolated value for each line.

Click on the Generate Invoice button at the bottom of the page.



The user is returned to the Invoice Processing menu.



Click the icon for Invoice Summary.

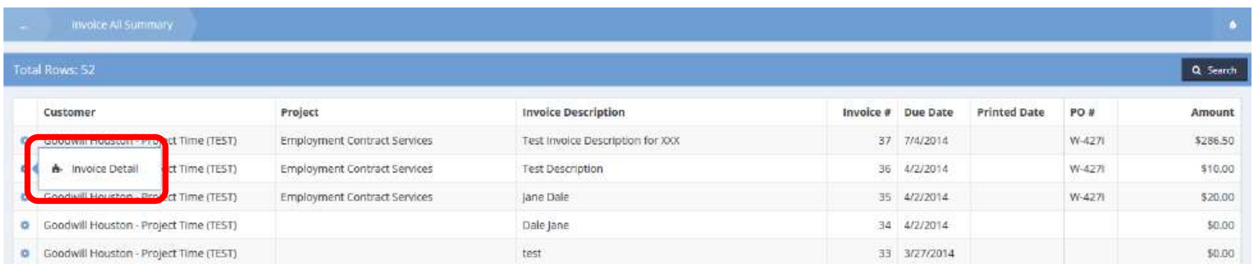
The Invoice All Summary page displays.


Invoice All Summary

Total Rows: 52 Search

Customer	Project	Invoice Description	Invoice #	Due Date	Printed Date	PO #	Amount
Goodwill Houston - Project Time (TEST)	Employment Contract Services	Test Invoice Description for XXX	37	7/4/2014		W-4271	$286.50
Goodwill Houston - Project Time (TEST)	Employment Contract Services	Test Description	36	4/2/2014		W-4271	$10.00
Goodwill Houston - Project Time (TEST)	Employment Contract Services	Jane Dale	35	4/2/2014		W-4271	$20.00
Goodwill Houston - Project Time (TEST)		Dale Jane	34	4/2/2014			$0.00
Goodwill Houston - Project Time (TEST)		test	33	3/27/2014			$0.00
Goodwill Houston - Project Time (TEST)		asf	32	3/27/2014			$0.00
Goodwill Houston - Project Time (TEST)		Test Invoice	31	2/8/2014			$0.00

Click on the action gear to the left of the invoice generated and click on Invoice Detail.

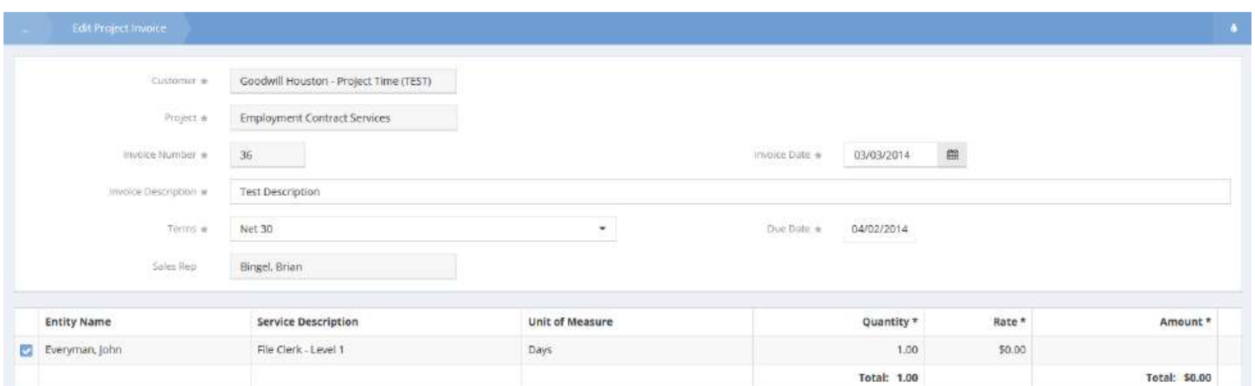

Invoice All Summary

Total Rows: 52 Search

Invoice Detail

Customer	Project	Invoice Description	Invoice #	Due Date	Printed Date	PO #	Amount
...ct Time (TEST)	Employment Contract Services	Test Invoice Description for XXX	37	7/4/2014		W-4271	$286.50
...ct Time (TEST)	Employment Contract Services	Test Description	36	4/2/2014		W-4271	$10.00
...ct Time (TEST)	Employment Contract Services	Jane Dale	35	4/2/2014		W-4271	$20.00
Goodwill Houston - Project Time (TEST)		Dale Jane	34	4/2/2014			$0.00
Goodwill Houston - Project Time (TEST)		test	33	3/27/2014			$0.00

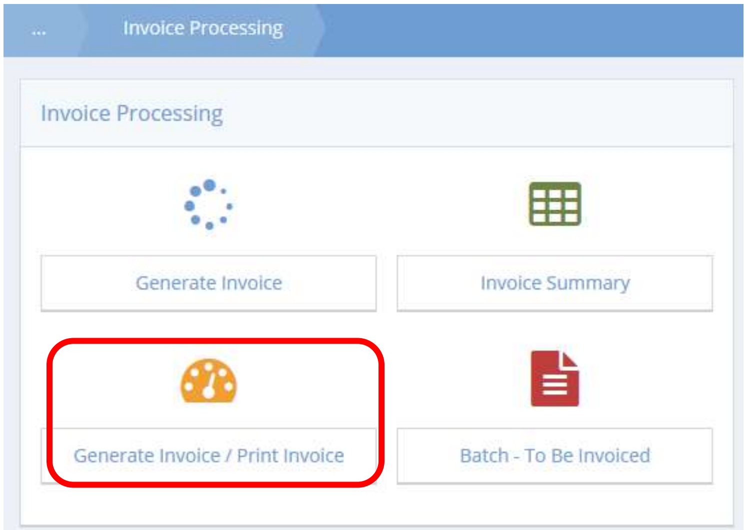
The Edit Project Invoice form displays. Verify that the time records are listed individually. This page is editable if required. Return to the Invoice Processing menu by selecting the Cancel button or the Save button.


Edit Project Invoice

Customer: Goodwill Houston - Project Time (TEST)
Project: Employment Contract Services
Invoice Number: 36 Invoice Date: 03/03/2014
Invoice Description: Test Description
Terms: Net 30 Due Date: 04/02/2014
Sales Rep: Bingel, Brian

Entity Name	Service Description	Unit of Measure	Quantity *	Rate *	Amount *
Everyman, John	File Clerk - Level 1	Days	1.00	$0.00	
			Total: 1.00		Total: $0.00

To print invoices, click the Generate Invoice / Print Invoice icon.



The Invoice Print Summary page displays.


Invoice Print Summary

Total Rows: 3

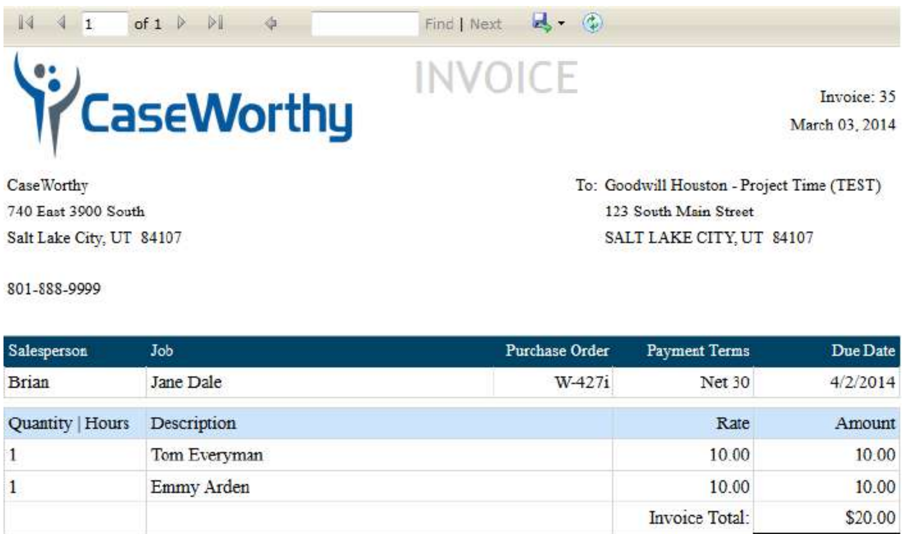
Customer	Project Description	Invoice Date	Due Date	Amount	Invoice Number
Goodwill Houston - Project Time (TEST)	Employment Contract Services	6/4/2014	7/4/2014	$286.50	37
Goodwill Houston - Project Time (TEST)	Employment Contract Services	3/3/2014	4/2/2014	$10.00	36
Goodwill Houston - Project Time (TEST)	Employment Contract Services	3/3/2014	4/2/2014	$20.00	35
				Total: $316.50	

Select the invoice to be printed and click on the Create Batch button in the lower right of the page.

The Invoice Batch Summary displays. Click on the action gear to the right of the batch to be printed and click on Print Invoices in Batch.

The Print Client Invoice page displays. Verify the Batch ID is correct and click the Report button in the lower right of the page.

The invoice displays in a new window.


1 of 1 Find | Next

INVOICE

Invoice: 35
March 03, 2014

CaseWorthy
740 East 3900 South
Salt Lake City, UT 84107

801-888-9999

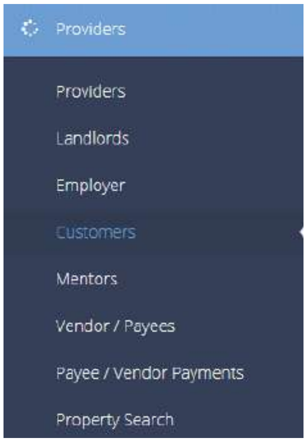
To: Goodwill Houston - Project Time (TEST)
123 South Main Street
SALT LAKE CITY, UT 84107

Salesperson	Job	Purchase Order	Payment Terms	Due Date
Brian	Jane Dale	W-427i	Net 30	4/2/2014

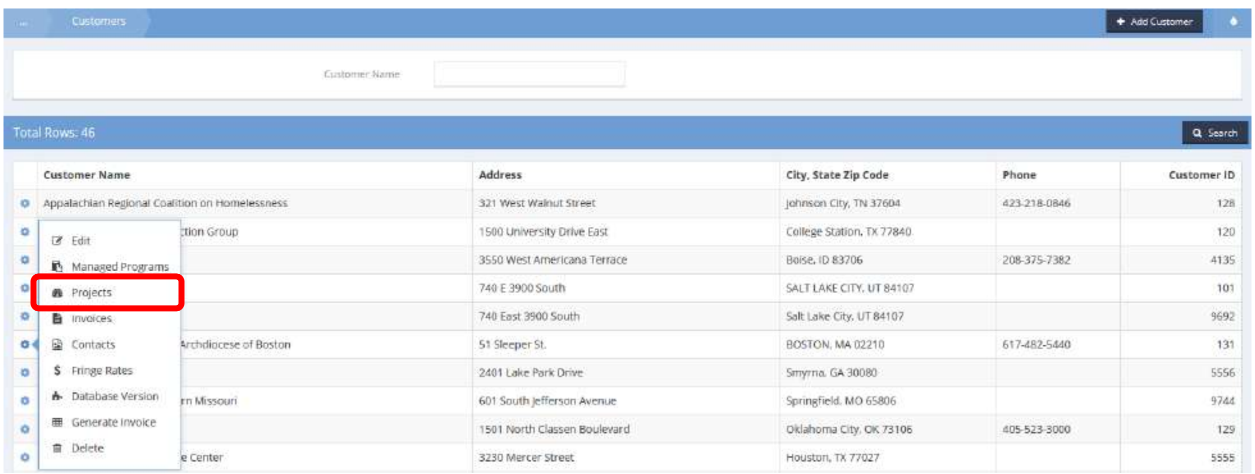
Quantity | Hours	Description	Rate	Amount
1	Tom Everyman	10.00	10.00
1	Emmy Arden	10.00	10.00
		Invoice Total:	$20.00

Click Done and Cancel after printing to return to the Invoice Processing menu page.

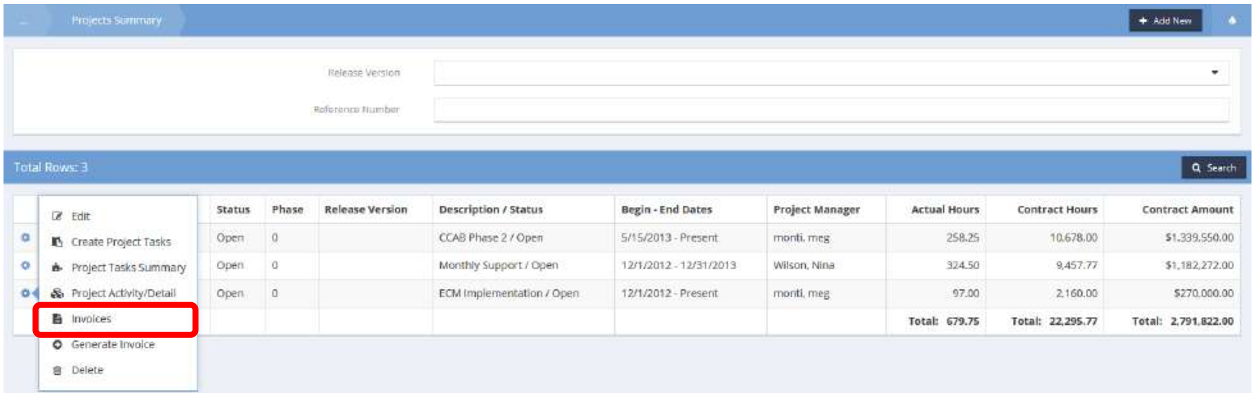
To view a specific customer's invoices, first navigate to: Organization > Providers > Customers



Select a customer with the action gear to the left and click on Projects.



The Projects (Summary) page displays a list of projects for that customer.



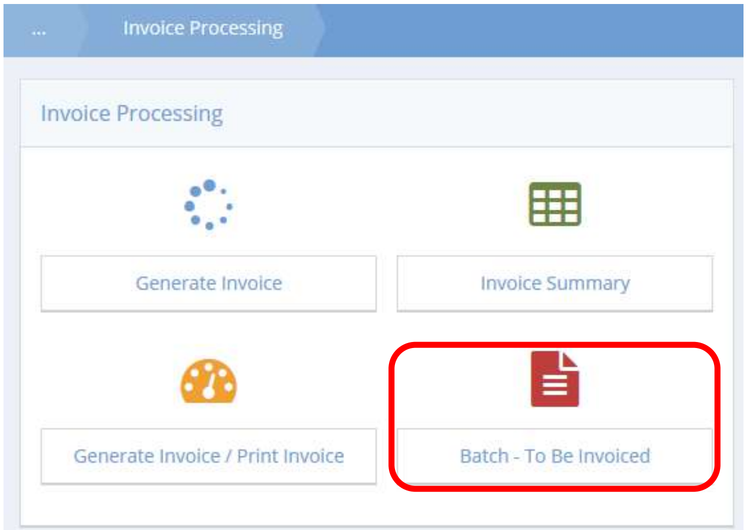
Select one of the projects on the list and click on the action gear to the left of the project record. Select Invoices from the pop up menu that appears.

The invoices for that project display in a list, Project Invoice Summary.

NOTE: ***Invoices are also accessible through the following navigation: Organization > Providers > Customers > Select a customer with the action gear to the left and click on Invoices. Invoices by Customer (Summary) page displays a list of invoices for that customer.***

Batch – To Be Printed Detail

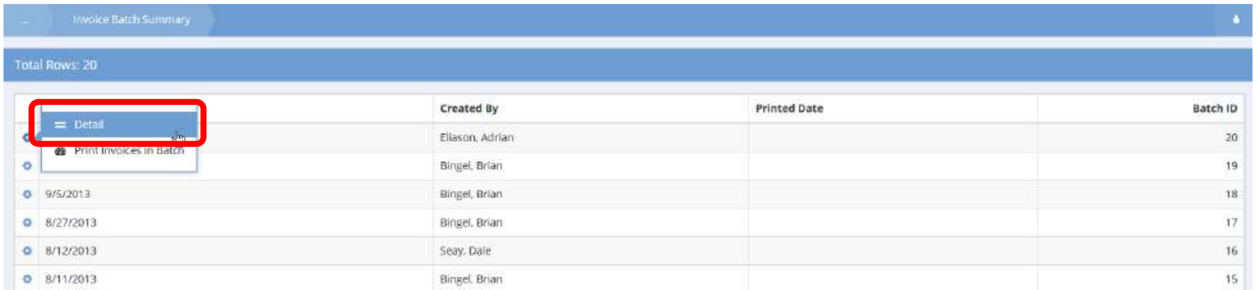
Objective: Presents a list of batches ready to be printed from which an individual invoice may be selected for printing.



Click on the Batch – To Be Invoiced icon in the Invoice Processing window.

The Invoice Batch Summary form displays.

Locate the desired batch and click on the action gear icon associated with it. Select Detail from the pop-up menu that appears.

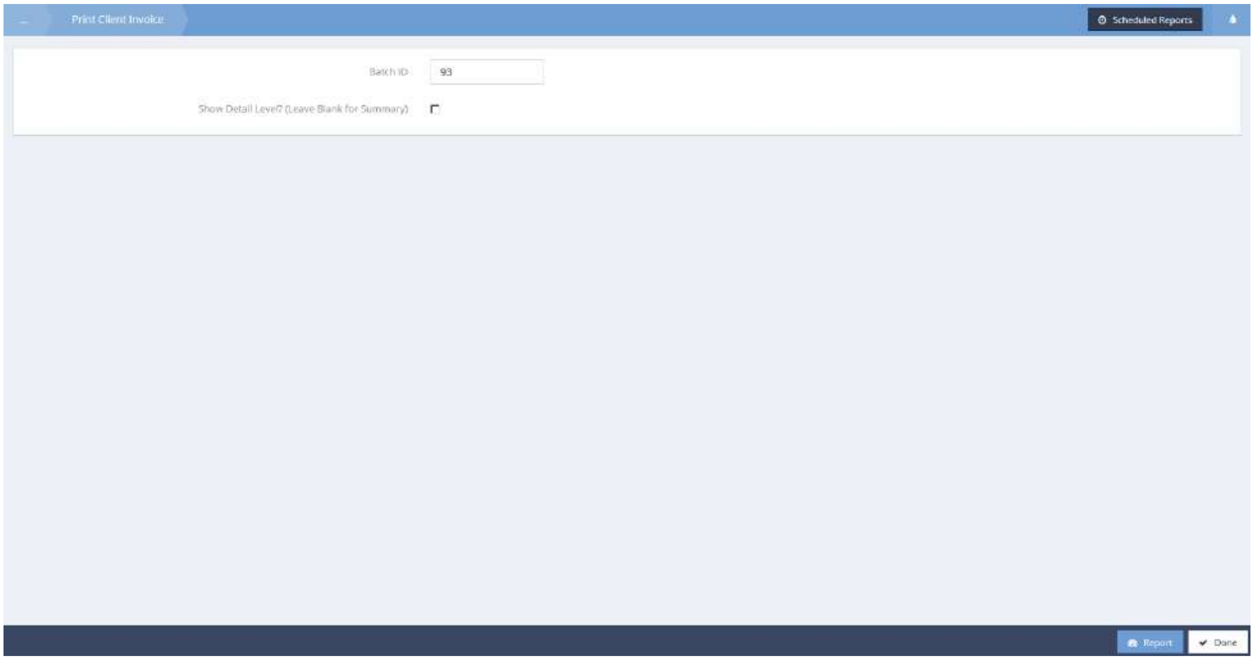


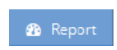
The Batch – To Be Printed Detail form displays.

Locate the desired batch and click on the action gear icon associated with it.

Select Print Individual Invoice from the pop-up menu that appears.

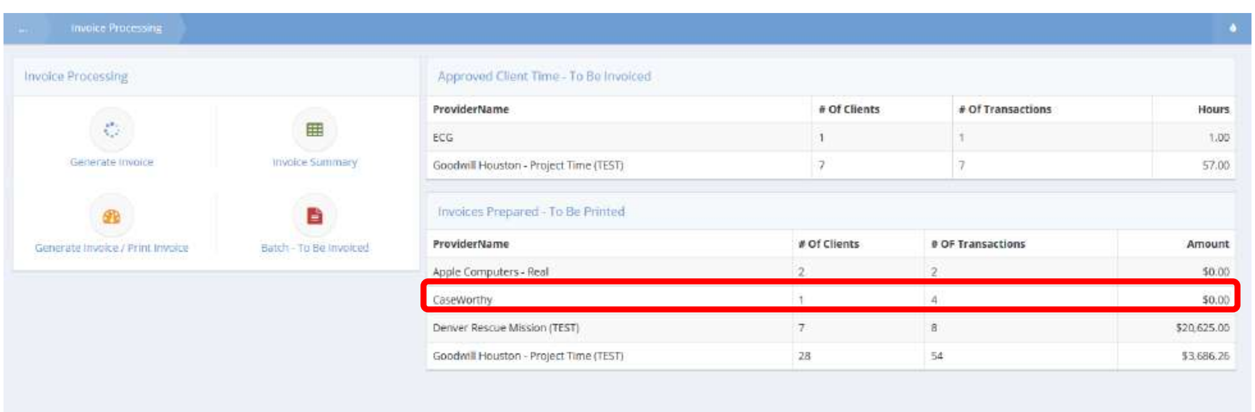
The Print Client Invoice form appears allowing the user to print the invoice.



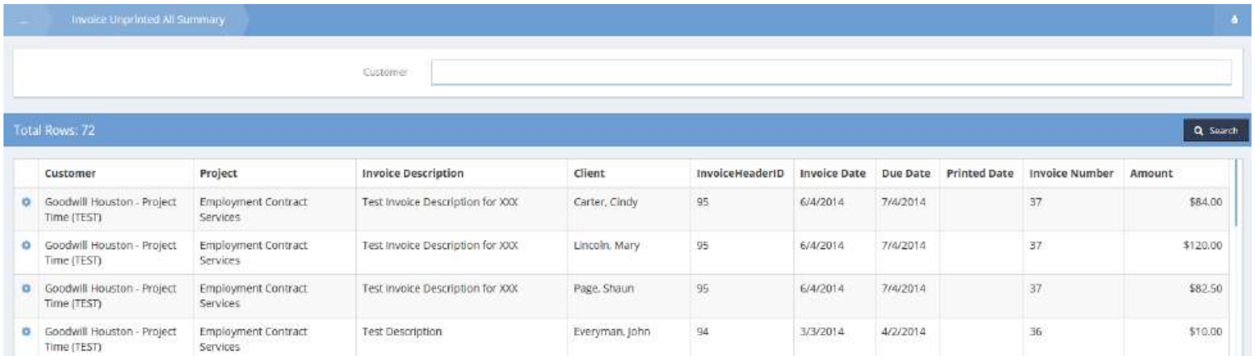
Click the checkbox to Show Detail Level if desired and then click the  button. The invoice displays in a new window where it can be printed.

Invoice Unprinted All Summary

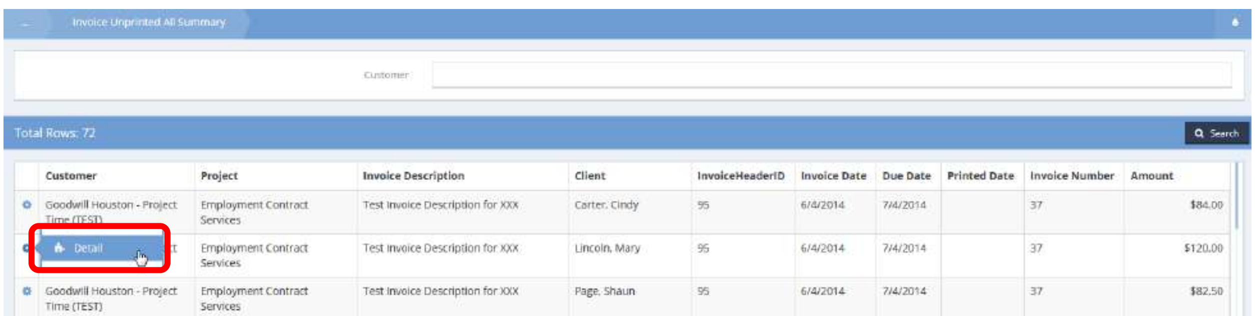
Objective: Access invoice detail for unprinted invoices from the list presented.



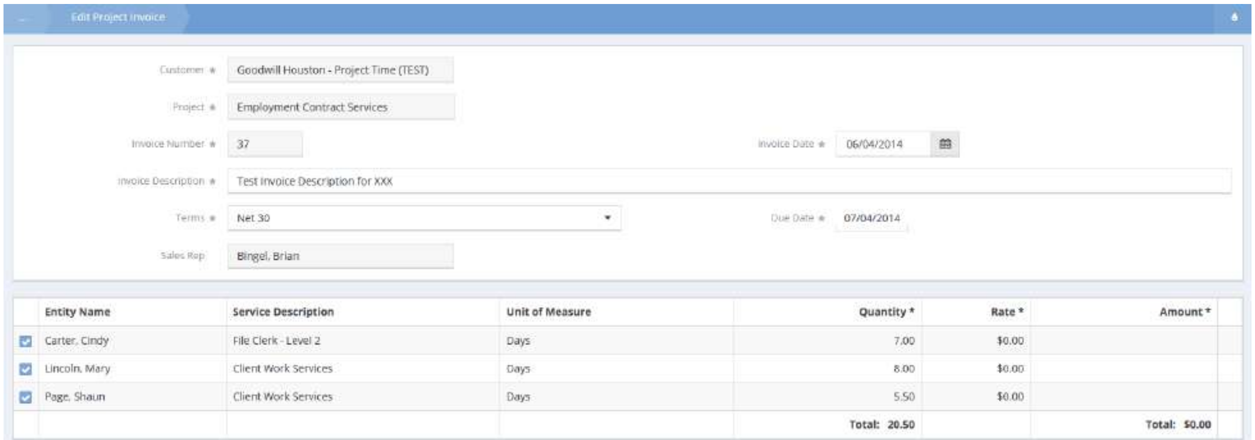
Click on the desired Provider in the Invoices Prepared - To Be Printed query table. The Invoice Unprinted All form displays of all the related invoices.



Locate the desired invoice and click on the action gear associated with it. Select Detail from the pop-up menu that appears.



The Edit Project Invoice form displays.

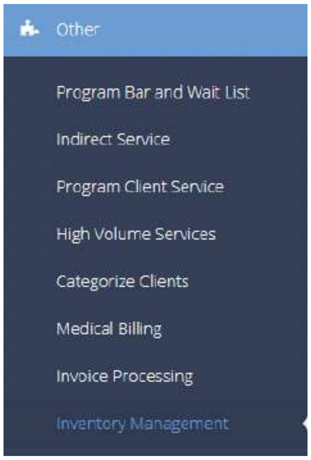


Make any desired changes and click the 

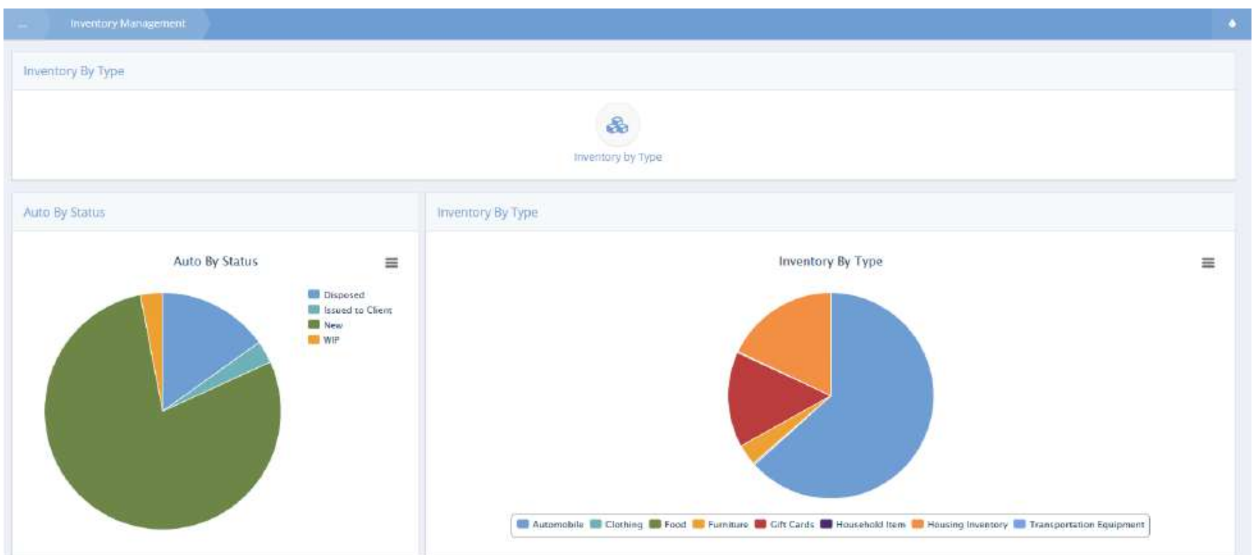
button.

Inventory Management

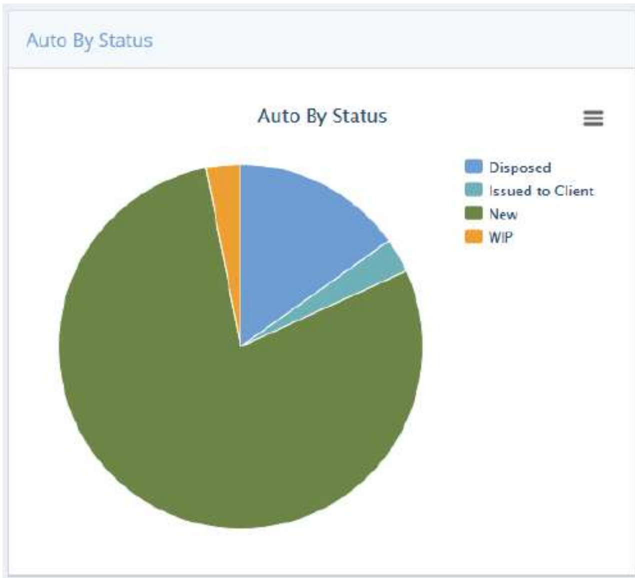
Inventory Charts



Objective: View graphic representation of inventory data as presented in charts.



Locate the Auto By Status chart.



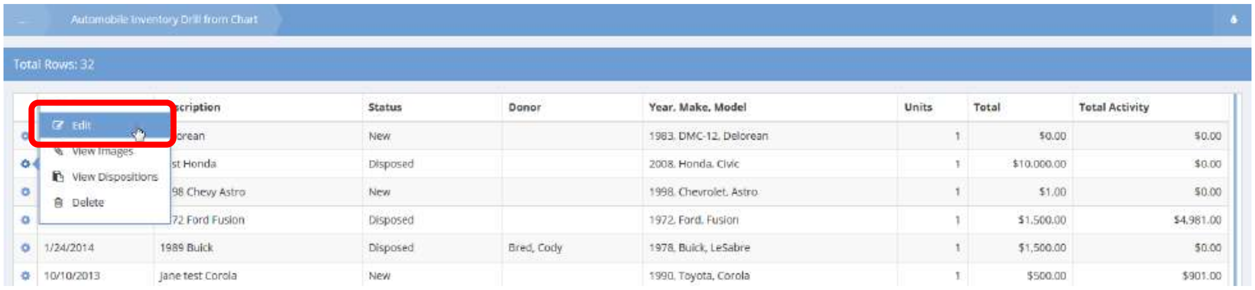
Click on the chart. The Automobile Inventory Drill from Chart form displays.


Automobile Inventory Drill from Chart

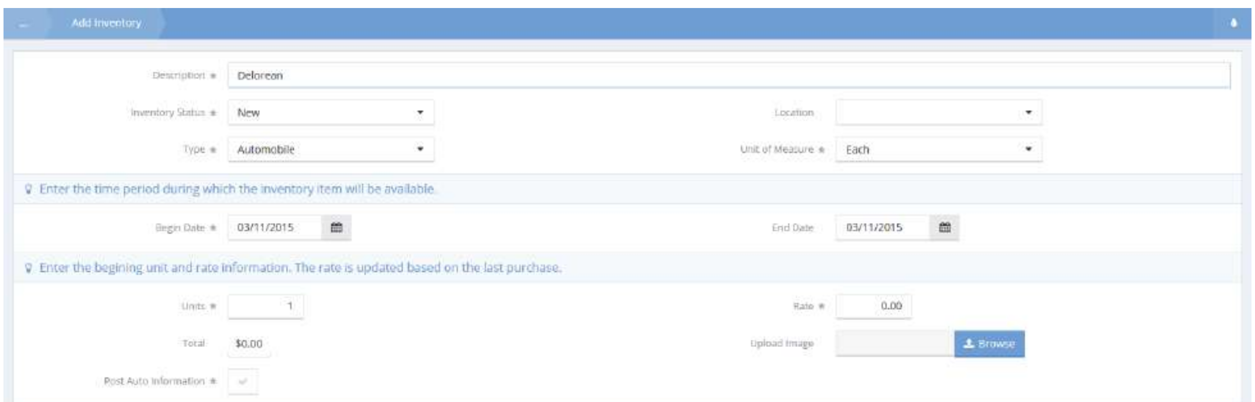
Total Rows: 32

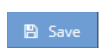
Begin Date	Description	Status	Donor	Year, Make, Model	Units	Total	Total Activity
3/11/2015	Delorean	New		1983, DMC-12, Delorean	1	$0.00	$0.00
12/5/2014	Test Honda	Disposed		2008, Honda, Civic	1	$10,000.00	$0.00
2/27/2014	1998 Chevy Astro	New		1998, Chevrolet, Astro	1	$1.00	$0.00
2/6/2014	1972 Ford Fusion	Disposed		1972, Ford, Fusion	1	$1,500.00	$4,981.00
1/24/2014	1989 Buick	Disposed	Bred, Cody	1978, Buick, LeSabre	1	$1,500.00	$0.00
10/10/2013	Jane test Corola	New		1990, Toyota, Corola	1	$500.00	$901.00
10/8/2013	V14-001	Disposed	Brian, Brian	1995, Dodge, Dakota	1	$900.00	$1.00
10/4/2013	VW	Issued to Client		1985, VW, bug	1	$500.00	$600.00
6/20/2013	Jane Civic 1999	Disposed		1999, Honda, Civic	1	$1.00	$400.00
6/14/2013	Vehicle Donation	WIP	Smith, Harry	2003, GMC , ENVOY	1	$750.00	$0.00
6/12/2013	Ng Camry 2000	New	Cia, Stuart	2000, Toyota, Camty	1	$2.00	$0.00

Locate the desired vehicle and click on the action gear  associated with it.



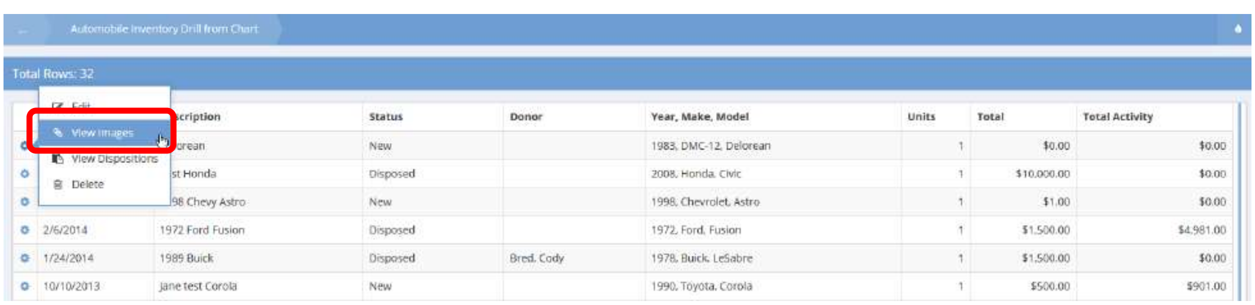
Select Edit from the pop-up menu that appears. The Inventory (Add) form displays.



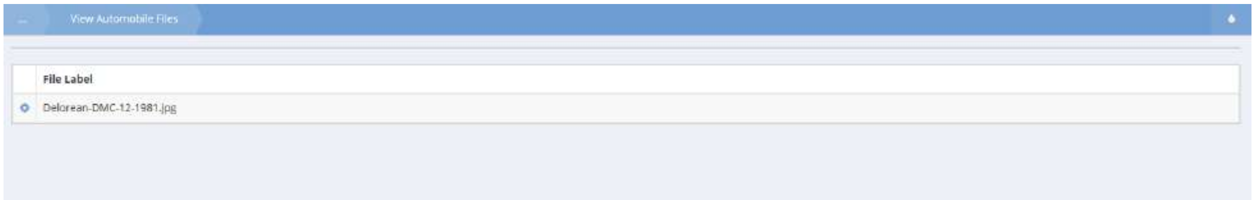
Make any changes desired and click on the 

button.

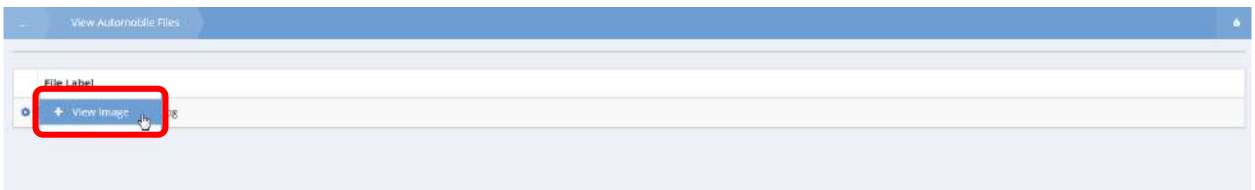
To view images of the vehicle, select View Images from the pop-up menu.



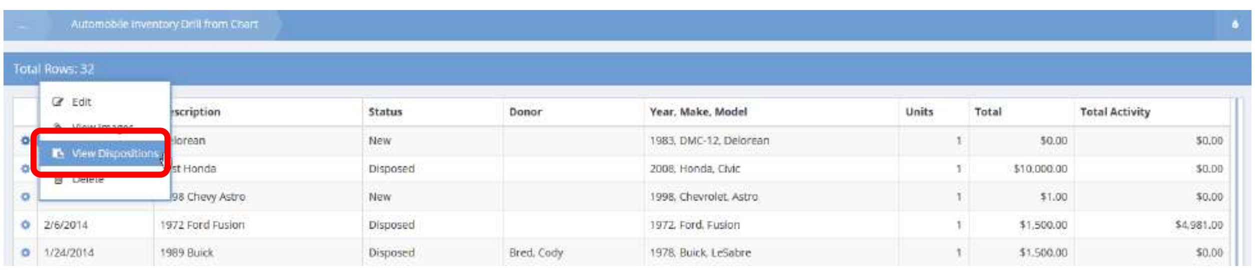
The View Automobile Files form displays.



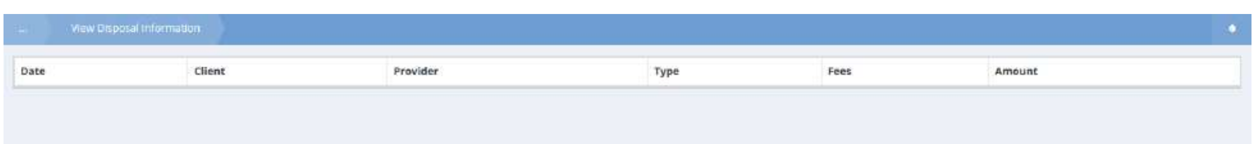
Locate the desired image file and click on the action gear associated with it. The image displays.



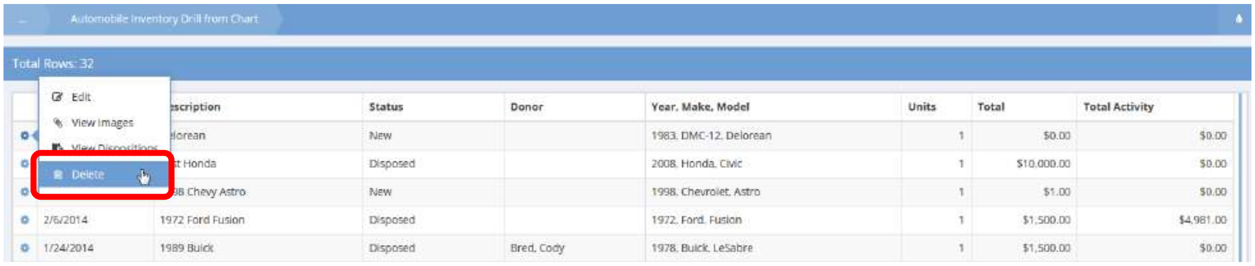
To view vehicle disposition records, select View Dispositions from the pop-up menu.



The View Disposal Information form displays with a list of dispositions for the vehicle.



To delete a vehicle, select Delete from the pop-up menu.

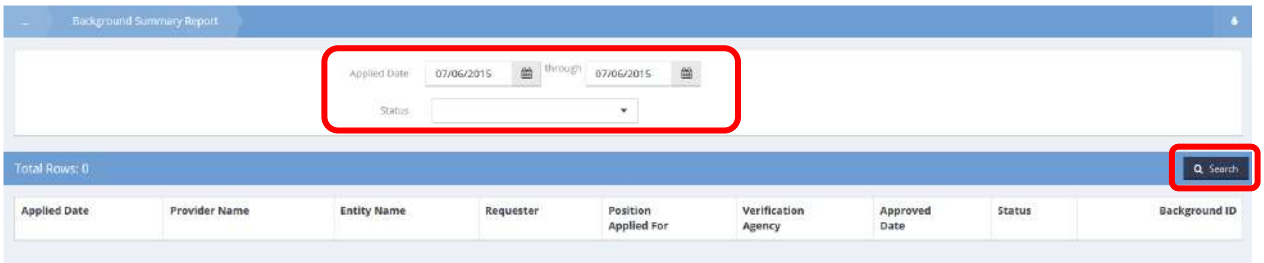


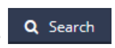
A dialog pops up requesting confirmation. Click  to delete.

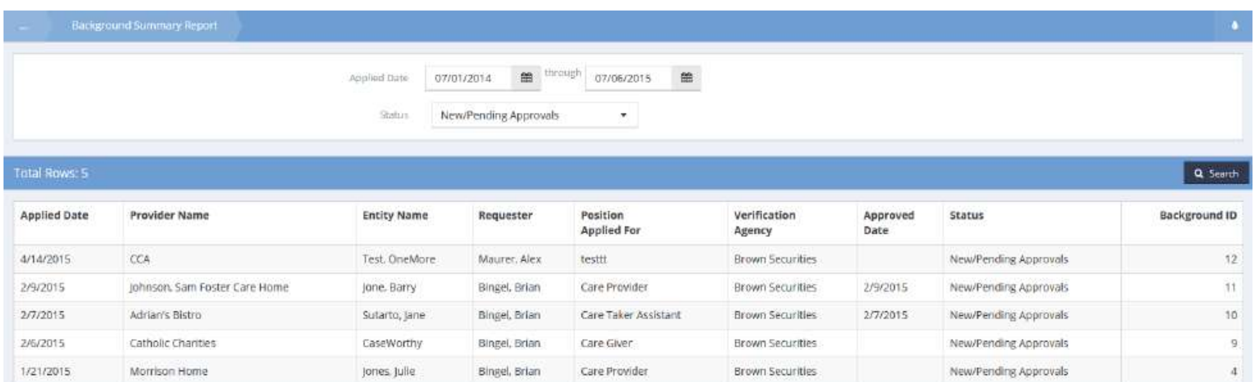
Background Report Summary

Background Summary Report

Objective: View a background summary report within a specified date range and status type.



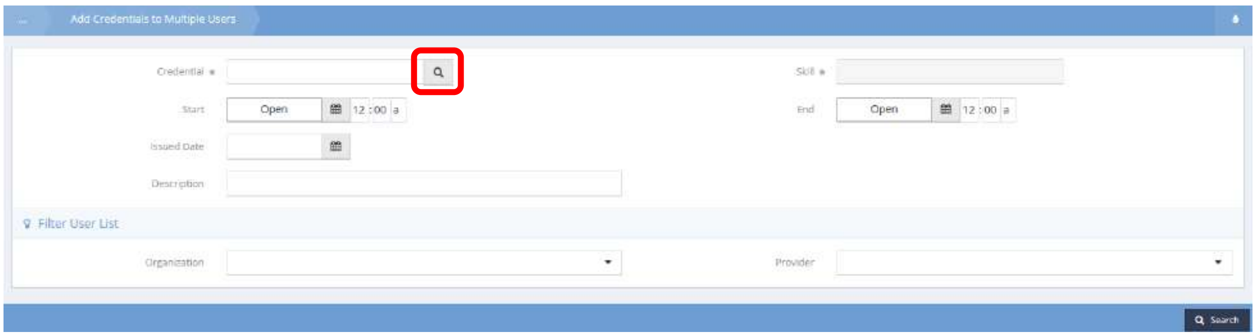
To filter the items that display in the spreadsheet: select a date range for the Applied Date category and select a status from the Status drop-down list. Click the  button to display the results. Results display in the spreadsheet below.

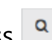


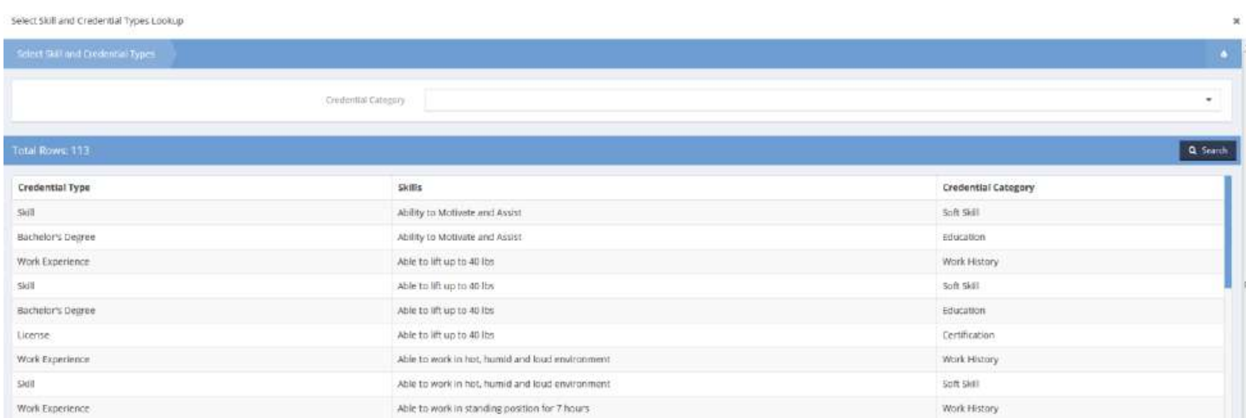
User Credentials

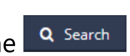
Add Credentials to Multiple Users Header

Objective: Add credentials to multiple users at a time.



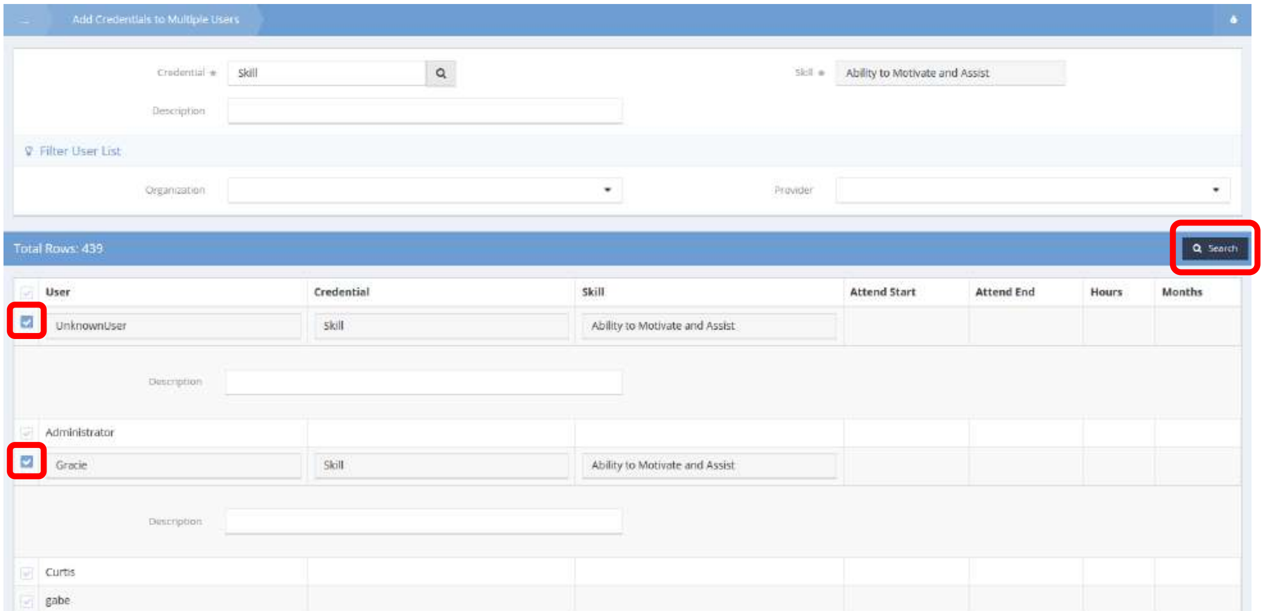
On the Add Credentials to Multiple User form, click the magnifying glass  lookup icon for Credential. The Select Skill and Credential Types Lookup form displays.



The Credential Category drop-down list can be used to filter by category by clicking the 

button. Click the desired credential upon locating it.

The selected credential and skill appear in the fields.



To filter the users that display, use the Organization and Provider drop-down lists and click the Search button. To add a credential to a user, click the clear checkbox icon. When all desired users have been selected, click the Save button.

Administration

Instructions related to the Administration workspace are found in the CaseWorthy™ System Administrator Manual.