



# 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

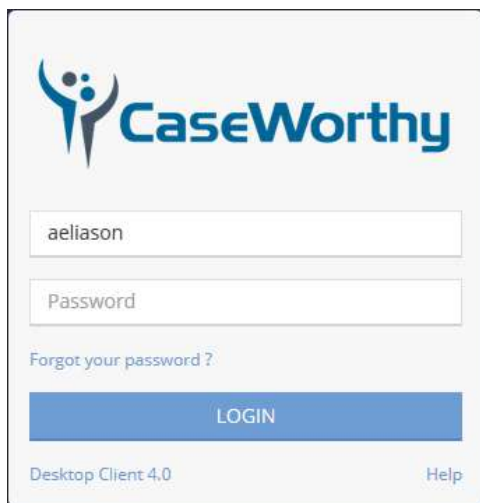
### Recommended

- High Speed Internet



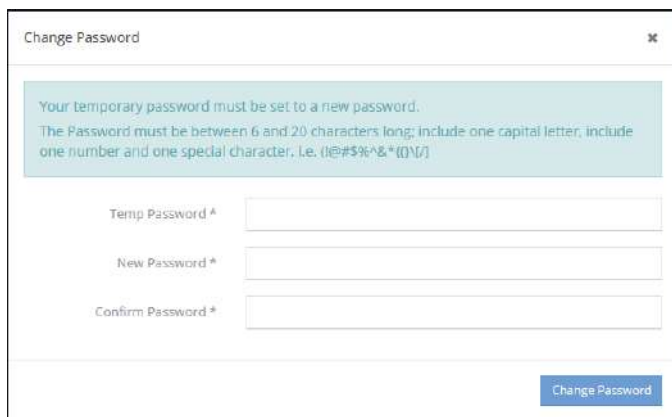
## General Navigation

### Logging in to CaseWorthy™

The image shows the CaseWorthy login interface. At the top is the CaseWorthy logo, which consists of a stylized blue icon of two people with arms raised, followed by the text "CaseWorthy" in a bold, blue, sans-serif font. Below the logo are two input fields: the first is labeled "Username" and contains the text "aeliason"; the second is labeled "Password" and is empty. Below these fields is a link that says "Forgot your password?". Underneath the link is a blue rectangular button with the word "LOGIN" in white, uppercase letters. At the bottom left of the login area, it says "Desktop Client 4.0", and at the bottom right, there is a link that says "Help".

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.

The image shows a "Change Password" pop-up window. The window has a title bar that says "Change Password" and a close button (an 'x' icon) in the top right corner. Inside the window, there is a light blue message box that says: "Your temporary password must be set to a new password. The Password must be between 6 and 20 characters long; include one capital letter; include one number and one special character. i.e. !@#%&^\*(){}|\./". Below the message box are three input fields: "Temp Password \*", "New Password \*", and "Confirm Password \*". Each field has a small asterisk indicating it is required. At the bottom right of the window is a blue button labeled "Change Password".

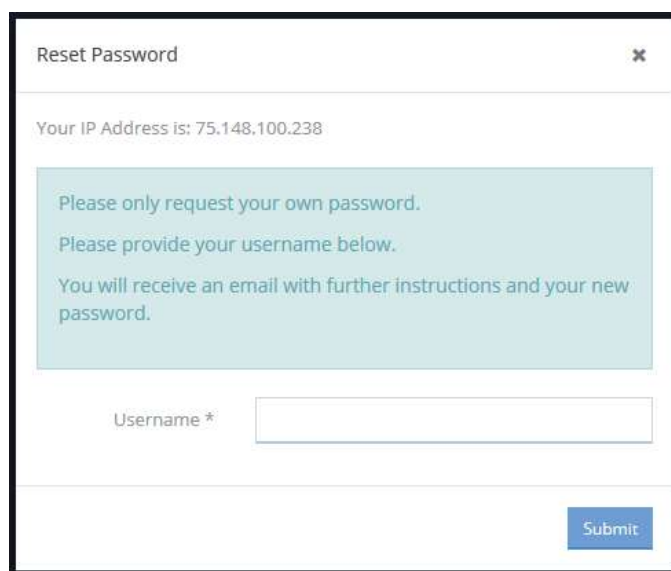
Enter the password provided by the administrator then create a new password following the password standards; passwords are case sensitive, must be between six and 20 characters in length, include one capital letter, one number and one special character, i.e. !@#%&^\*(){}|\./\.. Once the new password 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.

The image shows the CaseWorthy login interface. At the top is the CaseWorthy logo. Below it are two input fields: the first contains the username 'aeliason' and the second is labeled 'Password'. A red rectangular box highlights the text 'Forgot your password?' located below the password field. Below the input fields is a blue button labeled 'LOGIN'. At the bottom left, it says 'Desktop Client 4.0' and at the bottom right, there is a 'Help' link.

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

The image shows a 'Reset Password' pop-up window. At the top left is the title 'Reset Password' and a close button (X). Below the title, it says 'Your IP Address is: 75.148.100.238'. A light blue box contains the following instructions: 'Please only request your own password.', 'Please provide your username below.', and 'You will receive an email with further instructions and your new password.' Below this box is a text input field labeled 'Username \*'. At the bottom right of the window is a blue button labeled 'Submit'.

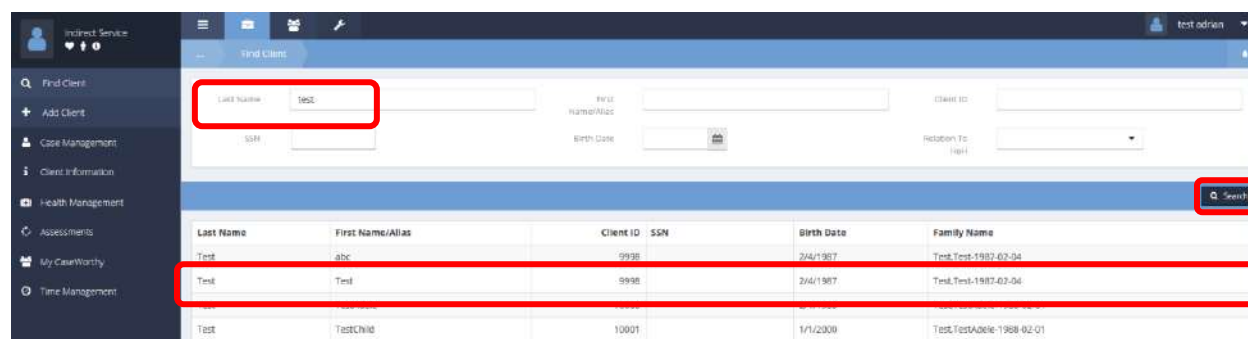
Once the email has been received, enter the temporary password and click on the [LOGIN](#) button. The system then requires the user to re-enter the temporary password and create a new, permanent password as described above.

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.

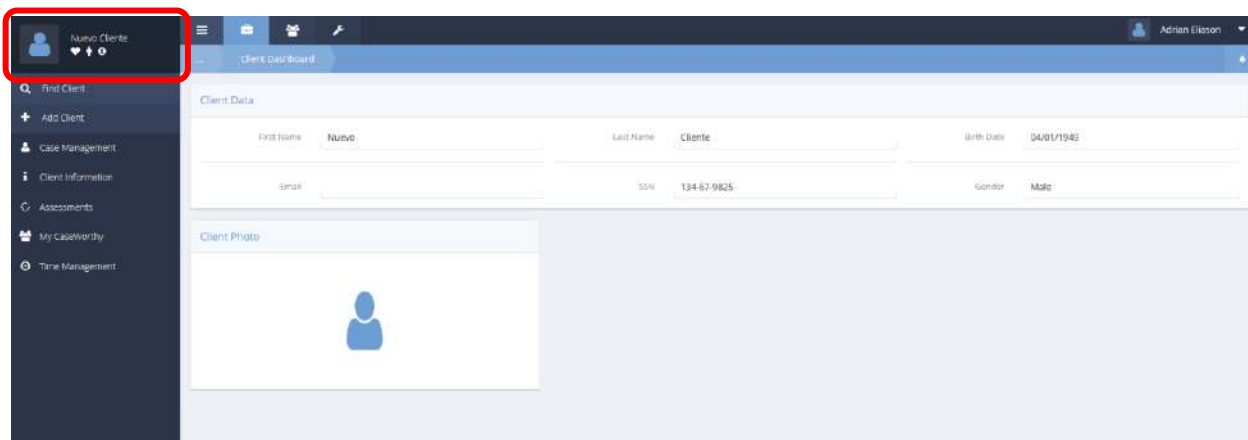
The system opens to a "limited access" screen the first time a new user logs in.



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.



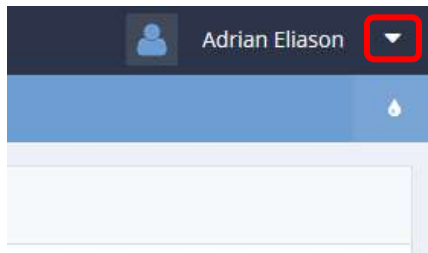
If the user has logged in previously, CaseWorthy™ opens to the following screen, displaying the active client record from the last session.



The screenshot displays the 'Client Dashboard' for a user named 'Nuevo Cliente'. The dashboard includes a sidebar with navigation options: Find Client, Add Client, Case Management, Client Information, Assessments, My CaseWorthy, and Time Management. The main content area shows 'Client Data' with fields for First Name (Nuevo), Last Name (Cliente), Birth Date (04/01/1943), SSN (134-67-9825), and Gender (Male). Below this is a 'Client Photo' section with a placeholder icon.

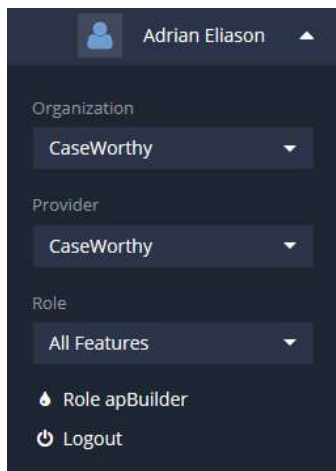
The **+ Add Client** button can also be used to launch Intake Workflows.


The screenshot shows the 'Find Client' screen. The sidebar on the left lists various intake workflows under the 'Add Client' button, which is highlighted with a red box. The main content area contains search fields for Last Name, First Name, SSN, Birth Date, and Client ID. The 'Add New' and 'Quick Add New' buttons in the top right corner are also highlighted with a red box.

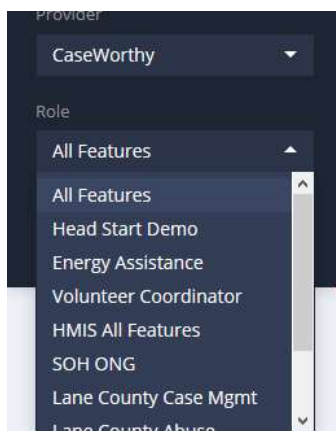
## Login Settings



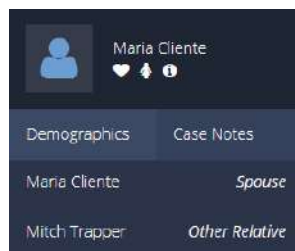
The user name appears in the top right-hand corner of the screen. Click the drop-down arrow  icon next to it. The field expands to include the current organization, provider, user role, and the  button.



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



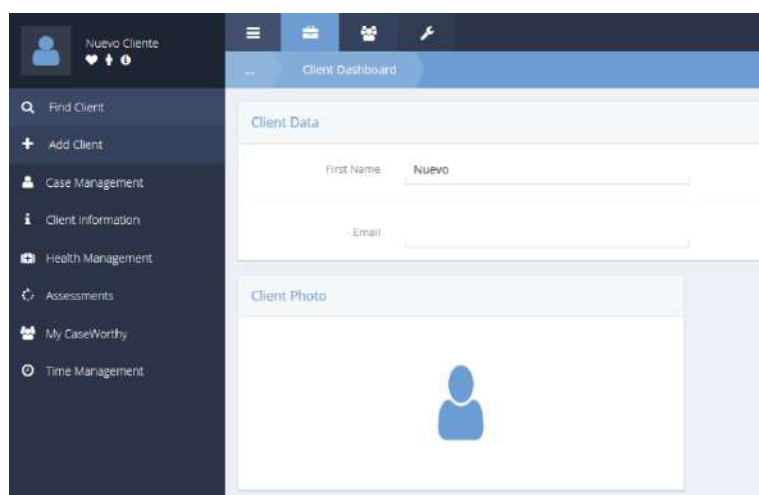
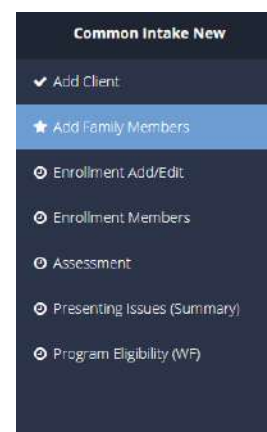
After clicking the client's picture next to their name, the field expands with additional family info. The icons below the client's name indicate date of birth, gender, and ID number. The description to the right of household members indicates their status. By clicking on the client photo in the top 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

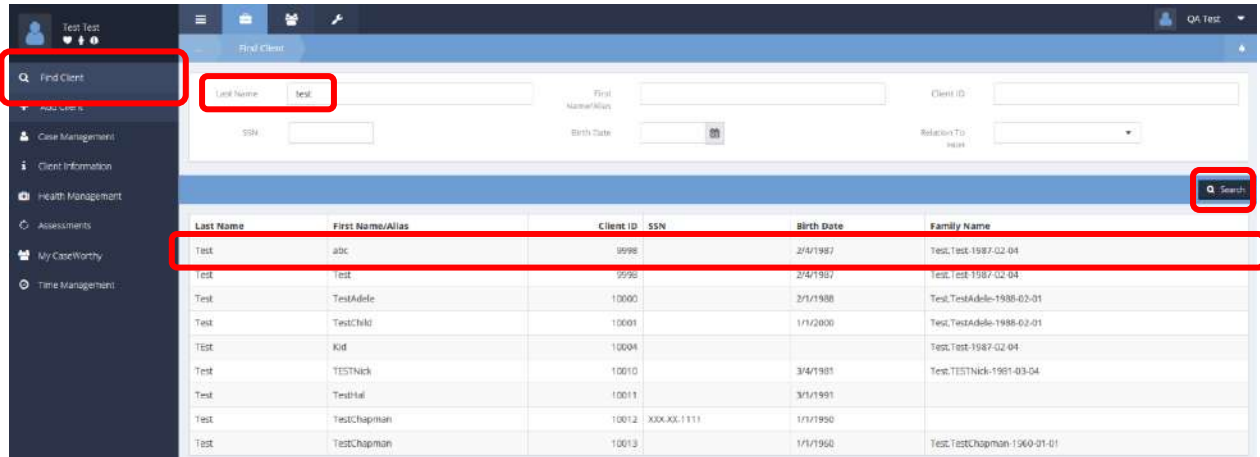
Some areas of functionality are large enough to require their own stand-alone document. They are listed here. Ask your CaseWorthy representative for access to these stand-alone docs.

- 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  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.



The screenshot displays the 'Find Client' interface. On the left is a sidebar with navigation options: 'Find Client' (highlighted with a red box), 'Case Management', 'Client Information', 'Health Management', 'Assessments', 'My CaseWorthy', and 'Time Management'. The main area contains a search form with the following fields: 'Last Name' (containing 'Test'), 'First Name/Initials' (containing 'Test'), 'Client ID', 'SSN', 'Birth Date' (with a calendar icon), and 'Relation To' (a dropdown menu). A 'Search' button (highlighted with a red box) is located in the top right corner of the search area. Below the search form is a table of results with the following columns: 'Last Name', 'First Name/Initials', 'Client ID', 'SSN', 'Birth Date', and 'Family Name'. The table contains 10 rows of data, with the first row highlighted by a red box.

Last Name	First Name/Initials	Client ID	SSN	Birth Date	Family Name
Test	abc	9998		2/4/1987	Test,Test-1987-02-04
Test	Test	9998		2/4/1987	Test,Test-1987-02-04
Test	TestAdult	10000		2/1/1988	Test,TestAdult-1988-02-01
Test	TestChild	10001		1/1/2000	Test,TestChild-1988-02-01
Test	Kid	10004			Test,Test-1987-02-04
Test	TESTNick	10010		3/4/1981	Test,TESTNick-1981-03-04
Test	TestHil	10011		3/1/1991	
Test	TestChapman	10012	XXXXX.1111	1/1/1990	
Test	TestChapman	10013		1/1/1990	Test,TestChapman-1960-01-01



## 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.

The screenshot shows the 'Add Client' form in CaseWorthy. The left sidebar contains a list of actions, with 'Add Client' highlighted by a red box. The main form area is titled 'Add Client Demographics' and contains various input fields for client information. A 'Check For Duplicates' button, also highlighted with a red box, is located in the center of the form.

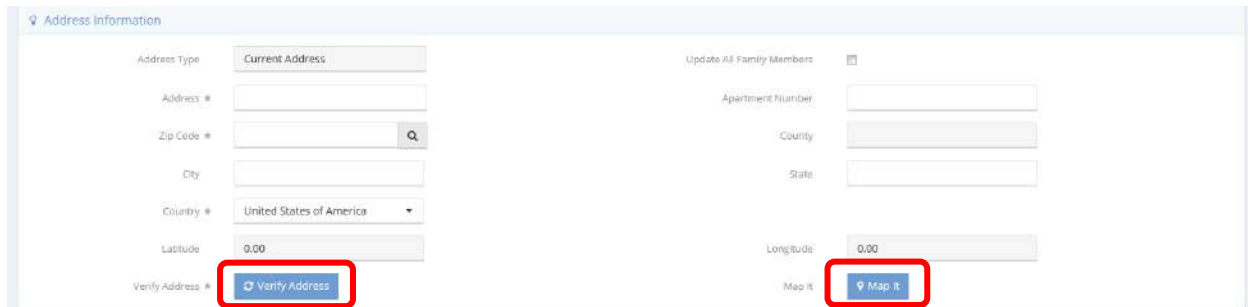
Enter some or all of the data above the [Check For Duplicates](#) button and click on it. The system searches the database to determine if the client already exists. If so, the client displays in the search results in a pop-up window and can be selected by clicking on the name. This fills the form with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

Dupe Check Results

Name	SSN	Birth Date	Alias	FamilyID
A Test, This is		02/03/1955		1090
Abrahms, Abe	135-79-2468	12/01/1965		4458
Adams, Adam	649-73-1825	04/01/1955		4449
Adams, Allen	555-55-5555	11/01/1945		1585
Adams, Ray	546-46-5465	09/18/1970		4214
Adams, Amir	333-43-2433	12/15/2009		1585
Adkins, Adale		08/01/1977	Deila	1771
Adon, James	454-54-5454	04/15/1954		1602
Agertsz, Scott		05/04/1955		1036

[Click to add client](#) [Cancel](#)

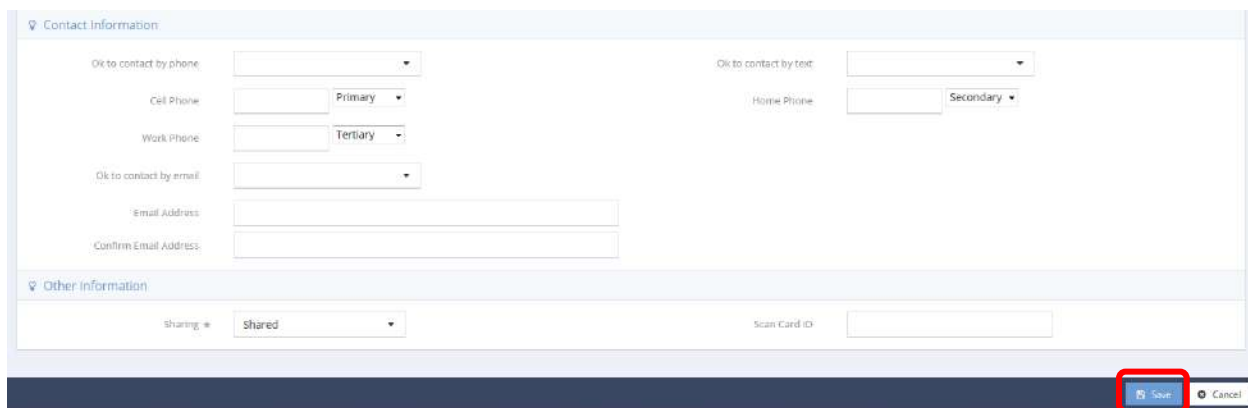
If the client does not currently exist in the system, click the **This is a new client** button and continue entering relevant and required data.



The screenshot shows the 'Address Information' form. On the left, there are fields for Address Type (Current Address), Address, Zip Code, City, Country (United States of America), Latitude (0.00), and Longitude (0.00). On the right, there are fields for Apartment Number, County, State, and Map It. The 'Verify Address' button is highlighted with a red box, and the 'Map It' button is also highlighted with a red box.

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.

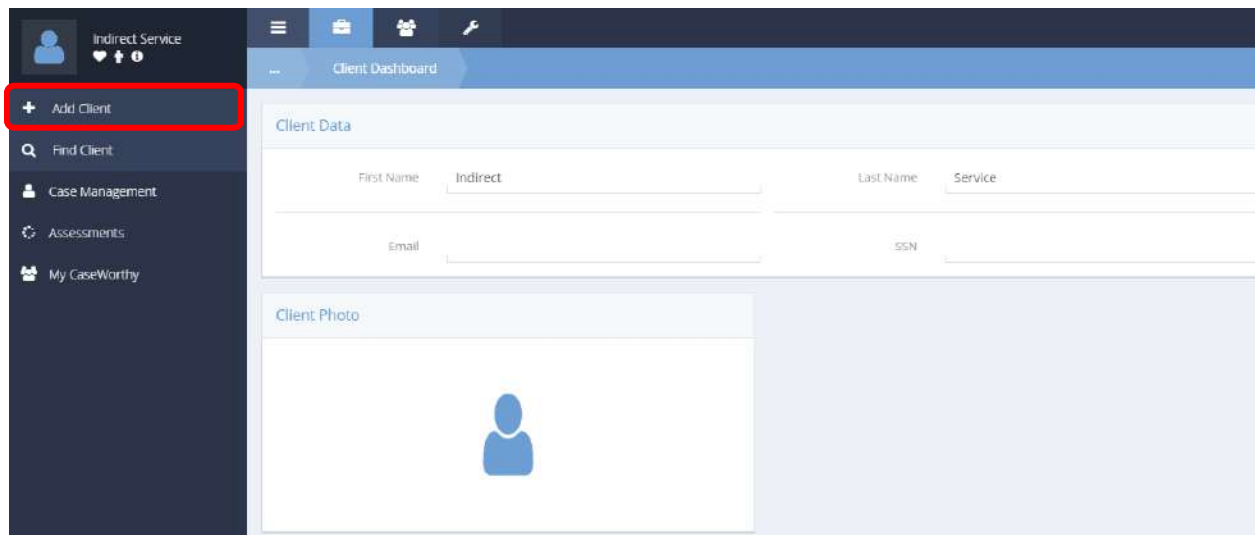
Adding contact info is optional. Click **Save** when finished.




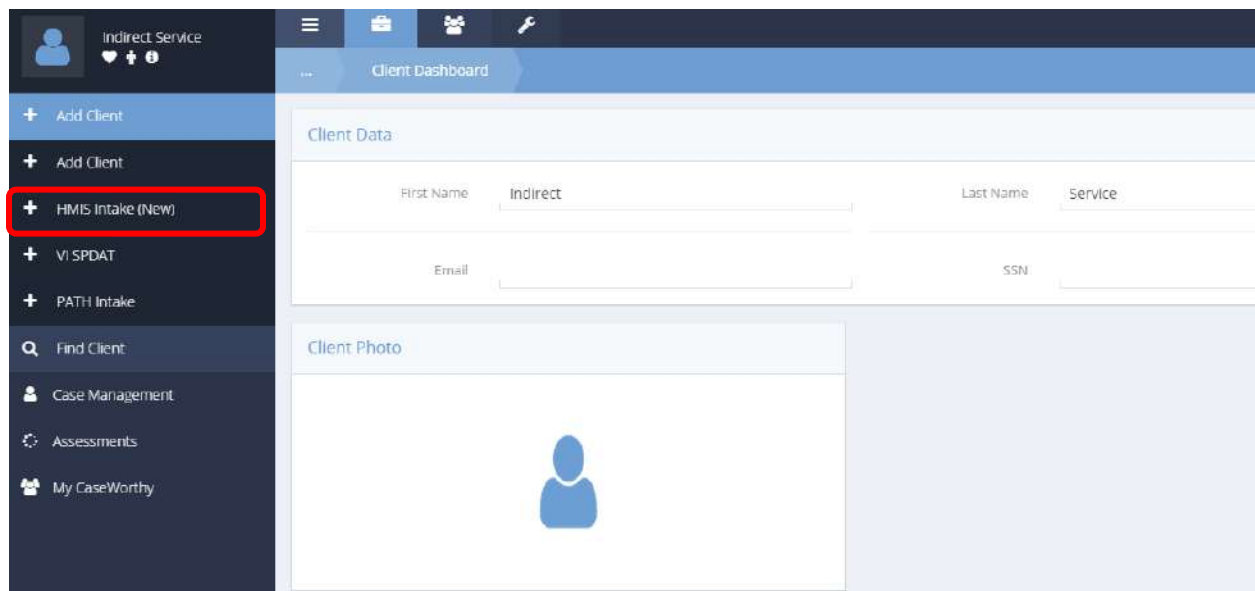
The screenshot shows the 'Contact Information' form. It includes fields for 'Ok to contact by phone' (with a dropdown), 'Cell Phone' (with a Primary dropdown), 'Work Phone' (with a Tertiary dropdown), 'Ok to contact by email' (with a dropdown), 'Email Address', and 'Confirm Email Address'. There are also fields for 'Ok to contact by text' (with a dropdown) and 'Home Phone' (with a Secondary dropdown). Below this is the 'Other Information' section with a 'Sharing' dropdown (set to Shared) and a 'Scan Card ID' field. At the bottom right, the 'Save' button is highlighted with a red box, next to a 'Cancel' button.

## 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.

The screenshot shows the 'HMIS Intake New' workflow with the 'HMIS Add New Client' form. The form is divided into two main sections: 'Identifying' and 'Contact Information'. The 'Identifying' section contains fields for Name Data Quality (Full name reported), First Name, Middle Name, Last Name, Suffix, Birth Date (Full), Age, SSN (Full), Gender, Citizenship Status, Relation to HOH (Self), Race (Choose Options...), Primary Language (English), and Ethnicity. A 'Check For Duplicates' button is located between the 'Identifying' and 'Contact Information' sections. The 'Contact Information' section includes an 'Address Type' dropdown (Current Address) and an 'Update All Family Members' checkbox. At the bottom right, there are 'Save' and 'Cancel' buttons, with the 'Save' button highlighted by a red box.

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

The HMIS Add Family Members form displays.

HMIS Intake New

HMIS Add Family Members

Total Rows: 1

Name Data Quality *	First Name *	Middle Name	Last Name *	Suffix	Dupe Check *	Birth Date *	Age	SSN *
<input checked="" type="checkbox"/> Full name reported	Mart		Writer			7/15/1989	25	554-84-8484

Save Cancel

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

Name Data Quality *	First Name *	Middle Name	Last Name *	Suffix	Dupe Check *	Birth Date *	Age	SSN *
<input checked="" type="checkbox"/> Full name reported					<a href="#">Check For Duplicates</a>			

Gender \*

Ethnicity \*

Race \*

Primary Language \*

Citizenship Status

Relation to HOH \*

Sharing \*

[Address](#)

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.

HMIS Intake New

HMIS Add New Client

HMIS Add Family Members

★ HMIS Enrollment Add/Edit

HMIS Enrollment Members

Assessment

HMIS Service Spreadsheet

Document Writer  
All Features

Family Name: Writer.Doc-2016-05-03

Project Entry Date: 05/18/2016

Project Exit Date: Open

Project: [Red Box]

Provider: CaseWorthy

Enroll current client: ☒

Assign Case Manager: ☐

Schedule Follow Up: ☒

Restriction Information

Restriction: Shared

Save Cancel

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.

HMIS Intake New

HMIS Add New Client

HMIS Add Family Members

★ HMIS Enrollment Add/Edit

★ HMIS Enrollment Members

Assessment

HMIS Service Spreadsheet


Document Writer  
All Features

Member enrollment dates must either fall between or be equal to the enrollment begin and end dates for the HOH.

Choose the family members you want to include in this enrollment from the list below.

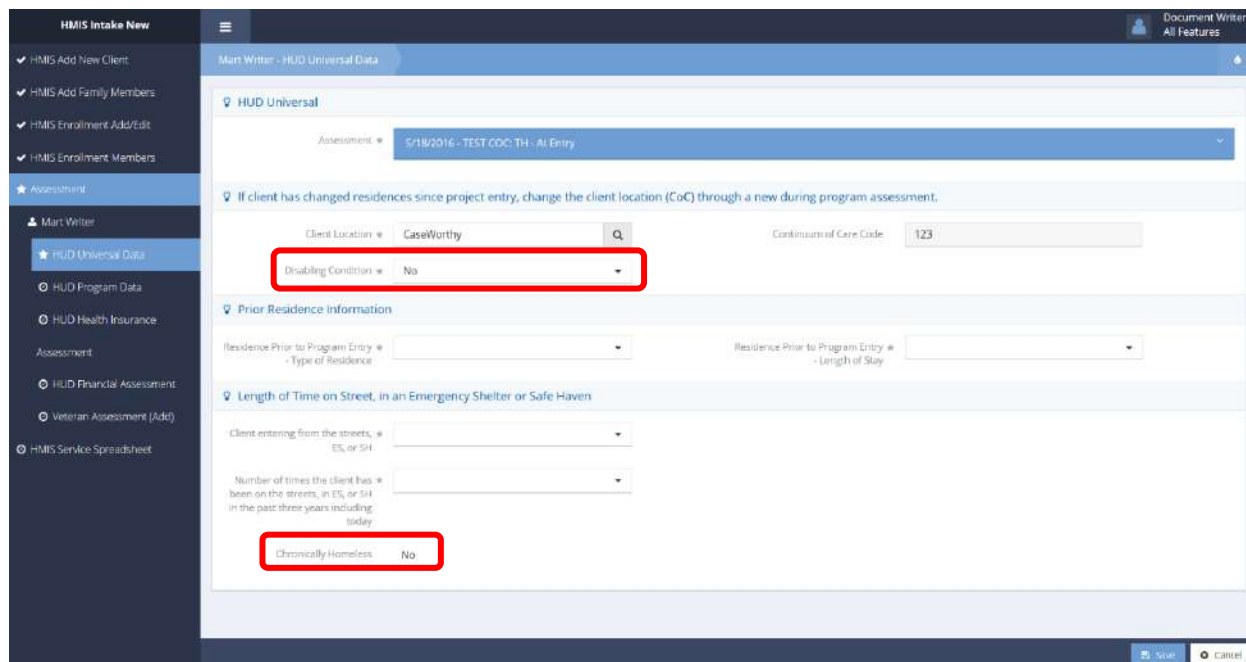
Client	Provider *	Restriction *	Begin Date *	End Date	Enrollment Relationship to HOH
<input checked="" type="checkbox"/> Writer, Mart	CaseWorthy	Shared	5/18/2016	Open	Self

Save Cancel


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  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.**



The screenshot shows the 'HMIS Intake New' interface with the 'HUD Universal Data' form. The form is titled 'HUD Universal' and includes a dropdown for 'Assessment' set to '5/18/2016 - TEST COC TH - At Entry'. Below this, a note states: 'If client has changed residences since project entry, change the client location (CoC) through a new during program assessment.' The 'Client Location' field is set to 'CaseWorthy'. The 'Disabling Condition' field is set to 'No' and is highlighted with a red box. The 'Prior Residence Information' section includes fields for 'Residence Prior to Program Entry - Type of Residence' and 'Residence Prior to Program Entry - Length of Stay'. The 'Length of Time on Street, in an Emergency Shelter or Safe Haven' section includes fields for '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'. The 'Chronically Homeless' field is set to 'No' and is highlighted with a red box. The bottom of the form has 'Save' and 'Cancel' buttons.

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  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.

The screenshot shows the 'HUD Program Data' form within the 'HMIS Intake New' interface. The form is titled 'HUD Program Data' and includes a sidebar with navigation options. The main form area contains several sections: 'Domestic Violence', 'Non-Cash Benefits from Any Source', 'Health Insurance', and 'Disabling Conditions'. The 'Disabling Conditions' section is highlighted with a red box around the 'Substance Abuse Problem' dropdown, which is set to 'Alcohol Abuse'. Other fields in this section include 'Expected to be of long continued and indefinite duration and substantially impairs ability to live independently', 'Documentation of the disability and severity on file', 'Currently receiving services/treatment for this condition', 'Mental Health Problem', and 'Developmental Disability'.

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 screenshot shows the 'HUD Program Data' form within the 'HMIS Intake New' interface. The form is titled 'HUD Program Data' and includes a sidebar with navigation options. The main form area contains several sections: 'Domestic Violence', 'Non-Cash Benefits from Any Source', 'Health Insurance', and 'Disabling Conditions'. The 'Disabling Conditions' section is highlighted with a red box around the 'Update Disabling Condition' button, which is located at the bottom of the section. Other fields in this section include 'Substance Abuse Problem', 'Expected to be of long continued and indefinite duration and substantially impairs ability to live independently', 'Documentation of the disability and severity on file', 'Currently receiving services/treatment for this condition', 'Mental Health Problem', 'Developmental Disability', 'Chronic Health Condition', 'HIV / AIDS', and 'Physical Disability'.

The HUD Chronic Homeless Post Control form displays.



Update Disabling Condition

HUD Universal

Assessment: 5/18/2016 - TEST COC: TH - At Entry

Disabling Condition: Yes

Disability expected to be of long-continued and indefinite duration and substantially impairs ability to live independently

Substance Abuse: Yes

Mental Health Problem: Yes

Length of Time on Street, in an Emergency Shelter or Safe Haven

Client entering from the streets, ES, or SH: No

Number of times the client has been on the streets, in ES, or SH in the past three years including today: One Time

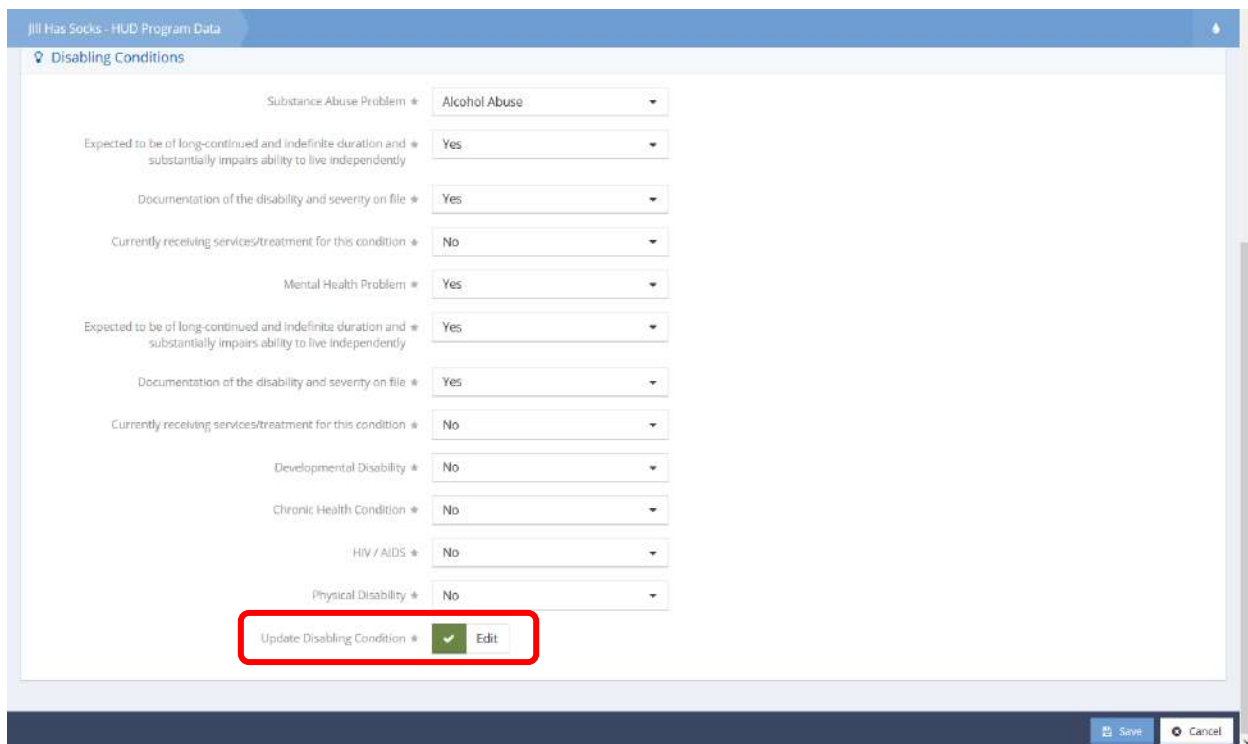
Total number of months homeless on the street, in ES, or SH in the past three years: 3

Chronically Homeless: No

Update Cancel

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.




The screenshot shows a web application window titled "Jill Has Socks - HUD Program Data". Below the title bar is a tab labeled "Disabling Conditions". The form contains several rows of data, each with a label and a dropdown menu. The labels are: "Substance Abuse Problem", "Expected to be of long-continued and indefinite duration and substantially impairs ability to live independently", "Documentation of the disability and severity on file", "Currently receiving services/treatment for this condition", "Mental Health Problem", "Expected to be of long-continued and indefinite duration and substantially impairs ability to live independently", "Documentation of the disability and severity on file", "Currently receiving services/treatment for this condition", "Developmental Disability", "Chronic Health Condition", "HIV / AIDS", and "Physical Disability". The dropdown menus are set to "Alcohol Abuse", "Yes", "Yes", "No", "Yes", "Yes", "Yes", "No", "No", "No", "No", and "No" respectively. At the bottom of the form, there is a button labeled "Update Disabling Condition" with a green checkmark icon and the word "Edit" next to it. This button is highlighted with a red rectangle. At the bottom right of the window, there are two buttons: "Save" and "Cancel".

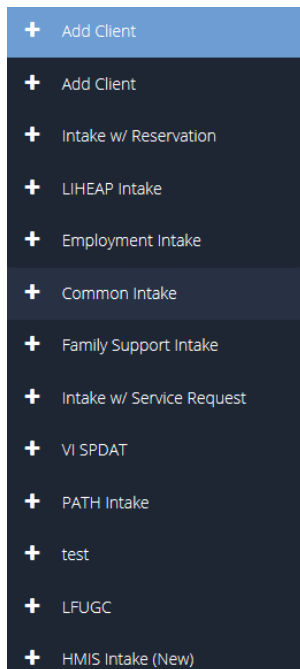
Label	Value
Substance Abuse Problem *	Alcohol Abuse
Expected to be of long-continued and indefinite duration and substantially impairs ability to live independently *	Yes
Documentation of the disability and severity on file *	Yes
Currently receiving services/treatment for this condition *	No
Mental Health Problem *	Yes
Expected to be of long-continued and indefinite duration and substantially impairs ability to live independently *	Yes
Documentation of the disability and severity on file *	Yes
Currently receiving services/treatment for this condition *	No
Developmental Disability *	No
Chronic Health Condition *	No
HIV / AIDS *	No
Physical Disability *	No

Update Disabling Condition \* ☒ Edit

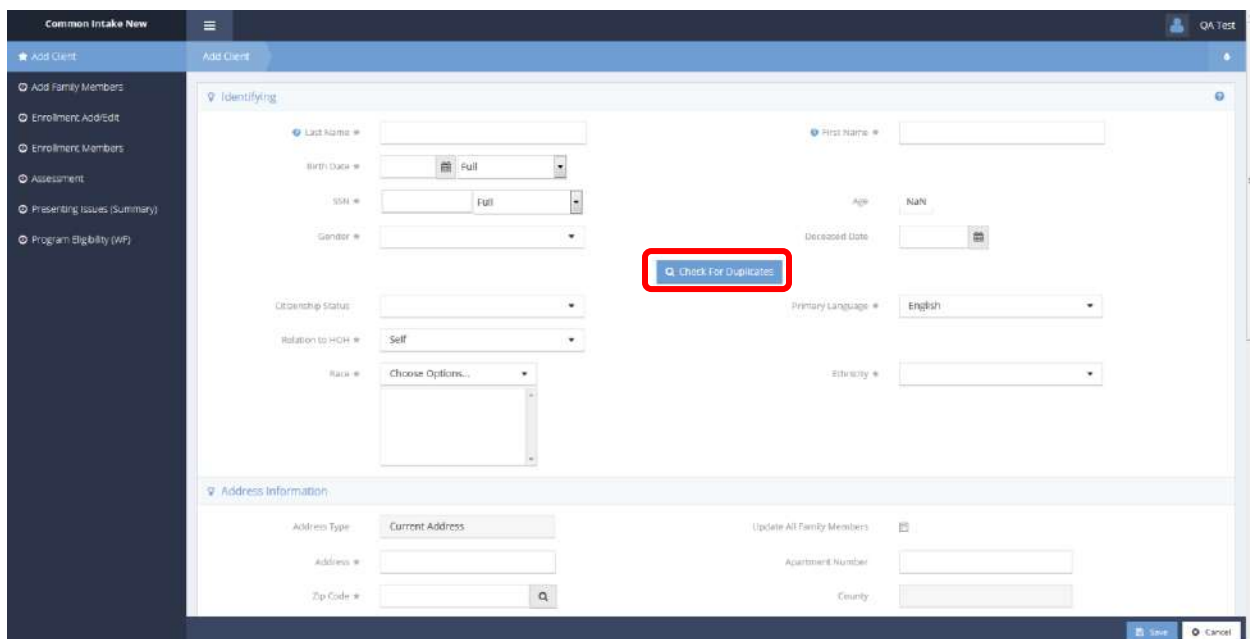
Save Cancel


Edits can always be made to update the disabling condition from this workflow. Click the  Save button to finish the remainder of the workflow.

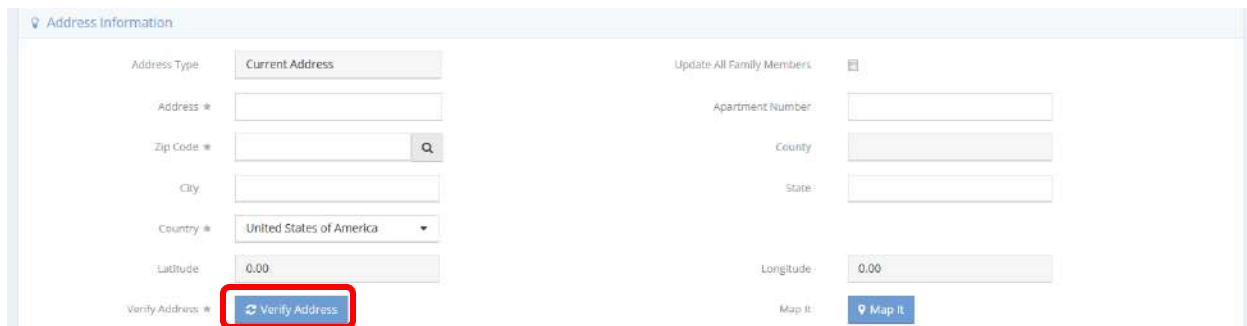
## Common Intake Workflow



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.




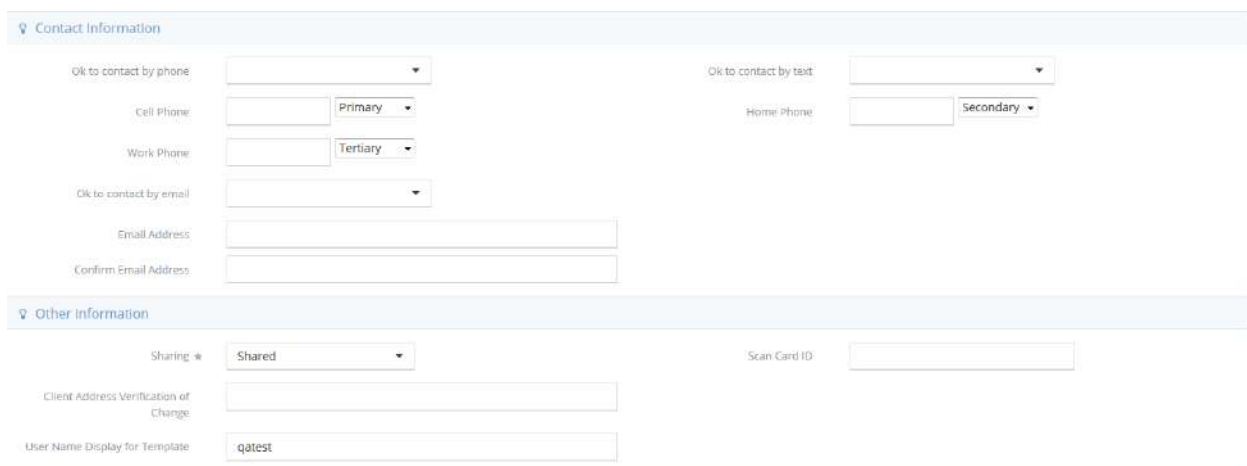
Proceed to enter an address and zip code. Click the  button and select the displayed address if correct.



The 'Address Information' form contains the following fields and controls:

- Address Type:** A dropdown menu currently set to 'Current Address'.
- Address \*:** A text input field.
- Zip Code \*:** A text input field with a search icon (magnifying glass) to its right.
- City:** A text input field.
- Country \*:** A dropdown menu currently set to 'United States of America'.
- Latitude:** A text input field with the value '0.00'.
- Verify Address \*:** A button with a circular arrow icon and the text 'Verify Address', which is highlighted with a red rectangle.
- Update All Family Members:** A checkbox.
- Apartment Number:** A text input field.
- County:** A text input field.
- State:** A text input field.
- Longitude:** A text input field with the value '0.00'.
- Map It:** A button with a location pin icon and the text 'Map It'.

Enter any other desired info and click the  button.




The 'Contact Information' and 'Other Information' forms contain the following fields and controls:

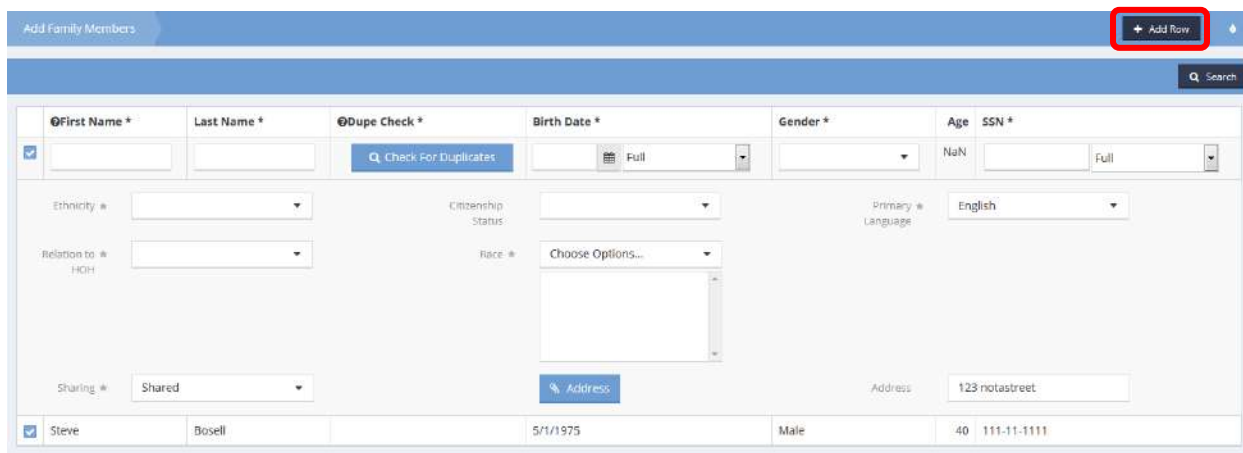
**Contact Information**

- Ok to contact by phone:** A dropdown menu.
- Cell Phone:** A text input field with a dropdown menu set to 'Primary'.
- Work Phone:** A text input field with a dropdown menu set to 'Tertiary'.
- Ok to contact by email:** A dropdown menu.
- Email Address:** A text input field.
- Confirm Email Address:** A text input field.
- Ok to contact by text:** A dropdown menu.
- Home Phone:** A text input field with a dropdown menu set to 'Secondary'.


**Other Information**

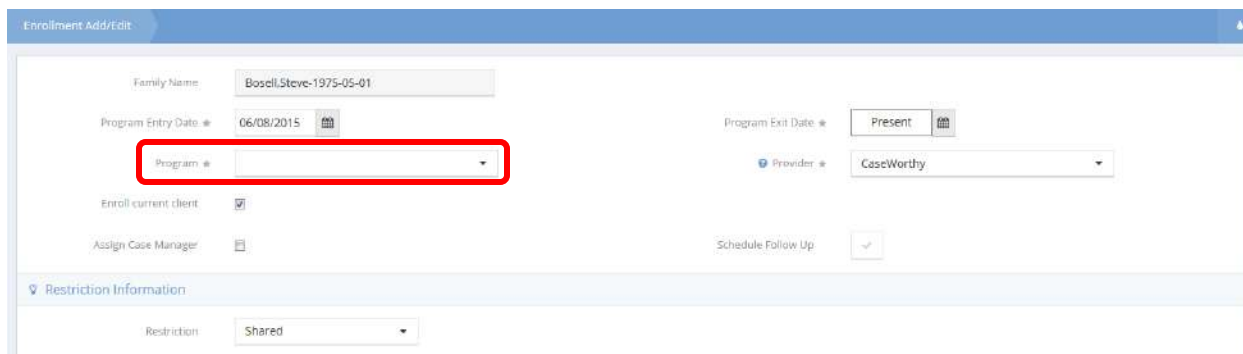
- Sharing \*:** A dropdown menu set to 'Shared'.
- Scan Card ID:** A text input field.
- Client Address Verification of Change:** A text input field.
- User Name Display for Template:** A text input field with the value 'qatest'.

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.





The screenshot shows the 'Add Family Members' form. The top header bar is blue with the text 'Add Family Members' on the left and an 'Add Row' button on the right, which is highlighted with a red rectangle. Below the header is a search bar. The main form area contains several input fields: 'First Name \*', 'Last Name \*', 'Dupe Check \*' (with a 'Check For Duplicates' button), 'Birth Date \*', 'Gender \*', 'Age', 'SSN \*', 'Ethnicity \*', 'Citizenship Status', 'Primary Language', 'Relation to \*', 'Race \*' (with a 'Choose Options...' dropdown), 'Sharing \*', and 'Address'. At the bottom, there is a table with one row containing the following data: Steve, Bosell, 5/1/1975, Male, 40, 111-11-1111.

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.



The screenshot shows the 'Enrollment Add/Edit' form. The top header bar is blue with the text 'Enrollment Add/Edit' on the left. The main form area contains several input fields: 'Family Name' (with the value 'Bosell, Steve-1975-05-01'), 'Program Entry Date \*' (with the value '06/08/2015'), 'Program Exit Date \*' (with the value 'Present'), 'Program \*' (a dropdown menu highlighted with a red rectangle), 'Provider \*' (with the value 'CaseWorthy'), 'Enroll current client' (checked), 'Assign Case Manager' (unchecked), 'Schedule Follow Up' (checked), and 'Restriction Information' (with the value 'Shared').

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.


Enrollment Members

Member enrollment dates must either fall between or be equal to the enrollment begin and end dates for the HcH.

Choose the family members you want to include in this enrollment from the list below.

Client	Provider *	Restriction *	Begin Date *	End Date
<input checked="" type="checkbox"/> Bosell, Steve	CaseWorthy	Shared	06/08/2015	Present

Enrollment Begin Date: 06/08/2015      Enrollment End Date: 12/31/9999

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

Bosell, Steve - Mental Health Diagnosis Assessment

Assessment #: 6/8/2015 - Behavioral Health - At Entry

Primary #:  Q      Primary ICD 9 Code:



Secondary:  Q      Secondary ICD 9 Code:


Tertiary:  Q      Tertiary ICD 9 Code:

Quaternary:  Q      Quaternary ICD 9 Code:

GAF Score #:

Issue Description *	Answer *
<input checked="" type="checkbox"/> Problems with Primary Support Group	No
<input checked="" type="checkbox"/> Educational Problems	No
<input checked="" type="checkbox"/> Problems Related to the Social Environment	No
<input checked="" type="checkbox"/> Occupational Problems	No
<input checked="" type="checkbox"/> Housing Problems	No
<input checked="" type="checkbox"/> Economic Problems	No
<input checked="" type="checkbox"/> Problems with Access to Health Care Services	No
<input checked="" type="checkbox"/> Problems related to Interaction with Legal System	No



 Save       Cancel

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

Presenting Issues (Summary) 

Total Rows: 0

Identified - End Date	Issue Description	Evaluation Level	Note	Restriction
-----------------------	-------------------	------------------	------	-------------









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  button when finished.

Add New


Search for Presenting Issue by Description or Issue Category

Description  Category













Total Rows: 296


Search for Presenting issue	Identified Date *	Description	Evaluation Level	Enrollment	Case Note	Restriction *
	06/08/2015 	Abuse and Neglect - Youth	<input type="text"/>	<input type="text"/>		Shared <input type="text"/>
		Active Military Parent - Family member				
		ADD				
		ADD				
		ADHD				
		Adj. Disorder - with Anxiety				

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.









Program Eligibility (WF) 


Total Rows: 14











Program	Organization	Action *	Created Date	Is Eligible	Email Contact	Description	Contacts
<input checked="" type="checkbox"/> 12 Permanent Housing for Homeless Disabled	CaseWorthy		4/16/2015	Yes			
<input checked="" type="checkbox"/> 13 Safe Haven	CaseWorthy		4/16/2015	No			
<input checked="" type="checkbox"/> 09 Head Start	CaseWorthy		4/16/2015	No			
<input checked="" type="checkbox"/> HOPWA	CaseWorthy		4/16/2015	No			
<input checked="" type="checkbox"/> 1 English for Employment	CaseWorthy		4/16/2015	Yes			
<input checked="" type="checkbox"/> 2 YAGA	CaseWorthy		4/16/2015	No			


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

The row expands.

Program Eligibility (WF)								
Total Rows: 14 <span>Search</span>								
Program	Organization	Action *	Created Date	Is Eligible	Email Contact	Description	Contacts	
<input checked="" type="checkbox"/> 12 Permanent Housing for Homeless Disabled	CaseWorthy		4/16/2015	Yes				
<input checked="" type="checkbox"/> 13 Safe Haven	CaseWorthy	Put on Wait List	04/16/2015	<input type="checkbox"/>				
<input checked="" type="checkbox"/> 09 Head Start	CaseWorthy		4/16/2015	No				
<input checked="" type="checkbox"/> HOPWA	CaseWorthy		4/16/2015	No				

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

Program Eligibility (WF)								
Total Rows: 14 <span>Search</span>								
Program	Organization	Action *	Created Date	Is Eligible	Email Contact	Description	Contacts	
<input checked="" type="checkbox"/> 12 Permanent Housing for Homeless Disabled	CaseWorthy		4/16/2015	Yes				
<input checked="" type="checkbox"/> 13 Safe Haven	CaseWorthy	Put on Wait List	04/16/2015	<input type="checkbox"/>				
<input checked="" type="checkbox"/> 09 Head Start	CaseWorthy	<div> --Nothing--  Assessed for Eligibility  Enroll Client in Program  Put on Wait List  Send Referral </div>	4/16/2015	No				
<input checked="" type="checkbox"/> HOPWA	CaseWorthy		4/16/2015	No				
<input checked="" type="checkbox"/> 1 English for Employment	CaseWorthy		4/16/2015	Yes				

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.



The screenshot displays the 'Add Client' form in the CaseWorthy system. The form is organized into two primary sections: 'Identifying' and 'Address Information'. The 'Identifying' section contains fields for 'Last Name', 'First Name', 'Birth Date' (with a calendar icon), 'SSN' (with a 'Full' dropdown), 'Age', 'Decedent Date' (with a calendar icon), 'Citizenship Status', 'Relation to HCH' (set to 'Self'), 'Race' (with a 'Choose Options...' dropdown), 'Primary Language' (set to 'English'), and 'Ethnicity'. A 'Check For Duplicates' button is positioned between the 'SSN' and 'Age' fields. The 'Address Information' section includes fields for 'Address Type' (set to 'Current Address'), 'Address', 'Zip Code' (with a search icon), 'Apartment Number', and 'County'. An 'Update All Family Members' checkbox is also present. At the bottom right, there are 'Save' and 'Cancel' buttons. The left sidebar shows a navigation menu with options like 'Add Client', 'Add Family Members', 'Enrollment Add/Edit', 'Enrollment Members', 'Assessment', 'Service Authorization CW', 'Workflow', 'Question', 'Workflow Enrollment Member', 'Summary', and 'Add Call for Existing Client'. The top right corner shows the user's name 'Adrian Elason' and 'All Features'.

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.

	First Name *	Last Name *	Dupe Check *	Birth Date *	Age	Gender *	SSN *
<input checked="" type="checkbox"/>			<a href="#">Check For Duplicates</a>	Full			Full
Ethnicity * <input type="text"/> Citizenship Status <input type="text"/> Primary Language English <input type="text"/> Relation to * HOH <input type="text"/> Race * Choose Options... <input type="text"/> Sharing * Shared <input type="text"/> <a href="#">Address</a> Address 123 notastreet ClientAddress.Address 10046 Latitude 40.78							
<input checked="" type="checkbox"/>	Nuevo	Cliente		4/1/1949	66	Male	134-67-9825
<input checked="" type="checkbox"/>	Maria	Cliente		5/2/1949	66	Female	649-78-2531

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.

Family Name: Cliente

Enrollment Entry Date: 07/10/2015

Enrollment Exit Date: Open

Program:

Provider: CaseWorthy

Enroll current client: ☒

Assign Case Manager: ☐

Schedule Follow Up: ☐

**Restriction Information**

Restriction: Shared


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.

**Enrollment Members**

⚠ Member enrollment dates must either fall between or be equal to the enrollment begin and end dates for the HoH.


📍 Choose the family members you want to include in this enrollment from the list below.

Client	Provider *	Restriction *	Begin Date *	End Date
<input checked="" type="checkbox"/> Cliente, Nuevo	CaseWorthy	Shared	7/10/2015	Present
<input type="checkbox"/> Cliente, Maria				

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



**Nuevo Cliente - HUD Program Data**



Assessment \* 7/10/2015 - 15 Supportive Services Only - At Entry



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



**Service Authorization CW (Workflow)**



Description \*


Begin Date \* 07/10/2015  End Date \* 





Account \*  Authorized Service Provider 



Service \* Choose Options...  

 Allow Override \* No 

State Authorization ID  State Authorization Date 07/10/2015 



Measurement Method *	Frequency *	Maximum Times per Frequency	Maximum Cumulative Amount
 			


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.

Question

Do you want to log a contact attempt?

☐ Yes

☐ No

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

The Add Call for Existing Client form displays.

Anonymous callers call on behalf of a client.  
 Existing Client callers call on their own behalf, or on behalf of another client.  
 Friend and Relative callers always call on behalf of a client.  
 New Client callers call on their own behalf, but can't call on behalf of another client.

Time: Call Time  
 00:00:05  
 Stop

Type of Caller: Existing Client  
 Encounter Type: Phone

Last Name: Cliente  
 First Name: Nuevo

Cell Phone:

Caller General Information:

Reason for Call:

Call Note: 

Rich text editor toolbar with options like Bold, Italic, Underline, etc.

Status: Open  
 Restriction: Shared

Save Cancel

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

Workflow Enrollment Member Summary					
Status	Program   Assigned Case Mgr	Program Entry - Exit Dates	Eligibility Rule(s) Not Met	Program ID	Enroll ID
Assessments Pending	15 Supportive Services Only	7/10/2015 - Present		45	13642

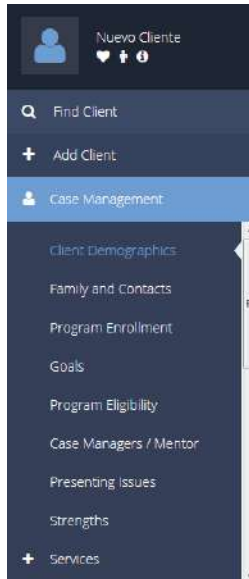
The Workflow Enrollment Member Summary form displays the status of the new enrollments. Click **Done** when finished viewing. The form displaying the completed steps of the workflow displays.

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.

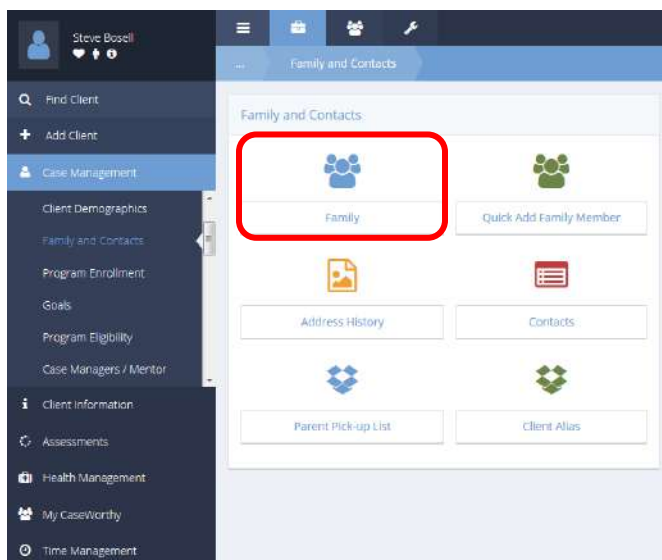
**Note:** This is the form that is launched when selecting **+ Add Client** from the menu. When selecting **Client Demographics** from the **Case Management** popup menu, it is populated with the existing data for the current client. Also, the Name Change checkbox, Old Name Begin Date and Old Name End 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.

Family Name	Date Added	Date Removed	Primary Language	Family ID
osell,Steve-1969-01-22	1/13/2015	Present	English	5615



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)

Edit Family Members


Total Rows: 4 + Add Family Member

Family Member *	Relationship *	Age	Gender	Lives W/ HoH	Date Added *	Date Removed
<input checked="" type="checkbox"/> April	Spouse	44	Female	No	1/22/2015	Present
<input checked="" type="checkbox"/> Steven Jr.	Child	14	Male	No	1/22/2015	Present
<input checked="" type="checkbox"/> April Jr.	Child	10	Female	No	1/22/2015	Present
<input checked="" type="checkbox"/> Steve	Self	46	Male	Yes	1/13/2015	Present

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.

Total Rows: 4 + Add Family Member


Family Member *	Relationship *	Age	Gender	Lives W/ HoH	Date Added *	Date Removed
<input checked="" type="checkbox"/> <input type="text" value=""/>	<input type="text" value=""/>	Male	<input type="text" value=""/>	No	01/23/2015	12/31/9999
<input checked="" type="checkbox"/> April	Spouse	44	Female	No	1/22/2015	Present
<input checked="" type="checkbox"/> Steven Jr.	Child	14	Male	No	1/22/2015	Present
<input checked="" type="checkbox"/> April Jr.	Child	10	Female	No	1/22/2015	Present
<input checked="" type="checkbox"/> Steve	Self	46	Male	Yes	1/13/2015	Present

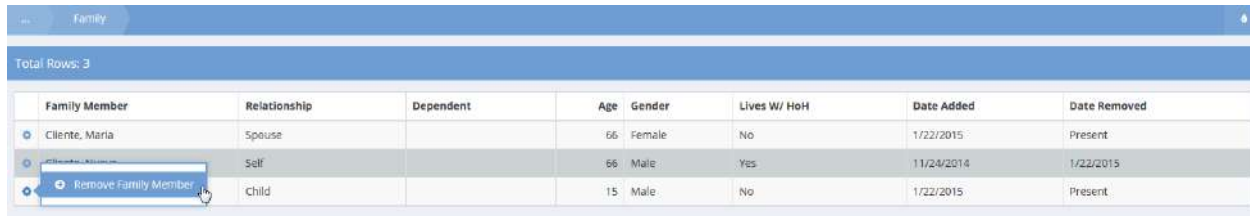
A new, expanded row displays. Click the magnifying glass  to add a new family member. The "Find Client" form opens in a pop-up. If the new family member already exists in the system, it is possible to search for them. To create a new client as a family member, click + Add New in the top right-hand corner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

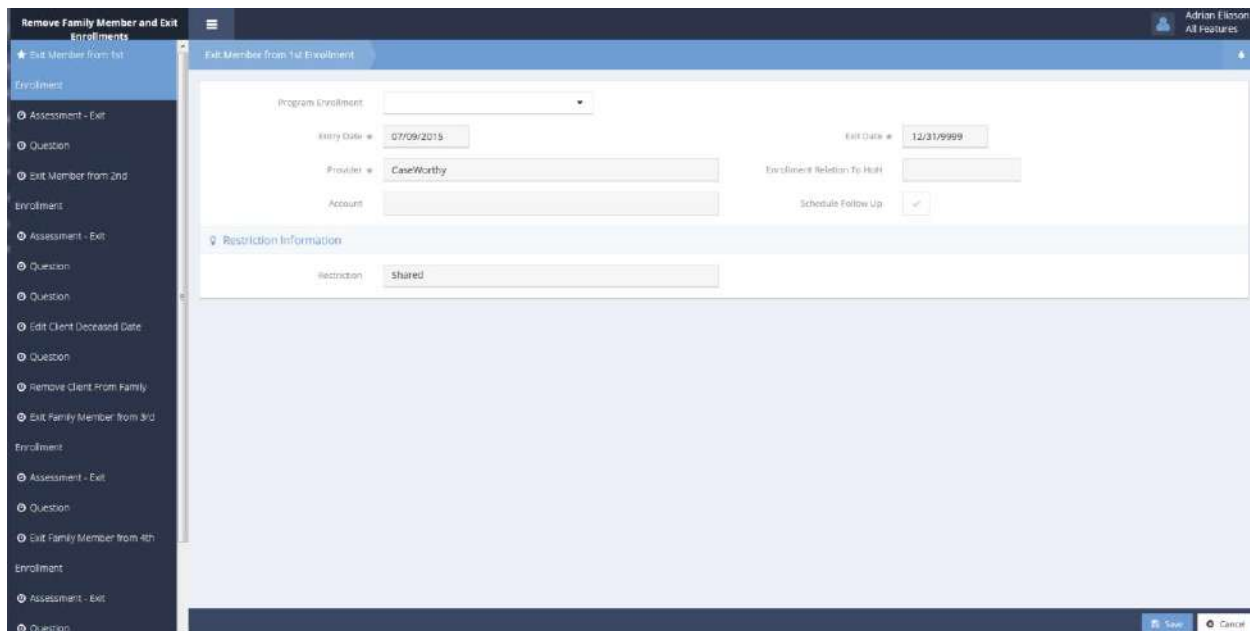



To remove a family member, click the action gear  icon associated with the desired family member and select Remove Family Members from the popup menu that appears. The Remove Member from Family form displays.



Family Member	Relationship	Dependent	Age	Gender	Lives W/ HoH	Date Added	Date Removed
Cilente, Maria	Spouse		66	Female	No	1/22/2015	Present
Cilente, Maria	Self		66	Male	Yes	11/24/2014	1/22/2015
Cilente, Maria	Child		15	Male	No	1/22/2015	Present

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.

**Remove Family Member and Exit Enrollments**

- ✓ Exit Member from 1st Enrollment
- ★ Question
- ⌚ Edit Client Deceased Date
- ⌚ Question
- ⌚ Remove Client From Family

Question

Is client deceased?


☐ Yes
 ☐ No


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

Edit Client Deceased Date

Deceased Date

07/09/2015



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


**Remove Family Member and Exit Enrollments**


- ✓ Exit Member from 1st Enrollment
- ✓ Question
- ✓ Edit Client Deceased Date
- ★ Question
- ⌚ Remove Client From Family



Question

Would you like to remove the client from the current family? This will create a new, one person family for the current client, and put an end date on the existing family member record.

☐ Yes
 ☐ No

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

Remove Client From Family							
	Family Name	Date Added *	Date Removed *	Relation To HoH	Family Member ID	Family ID	Open Enrollments
<input checked="" type="checkbox"/>	Cliente.Nuevo-1949-04-01	11/25/2014	07/09/2015 	Other Relative	7679	5499	

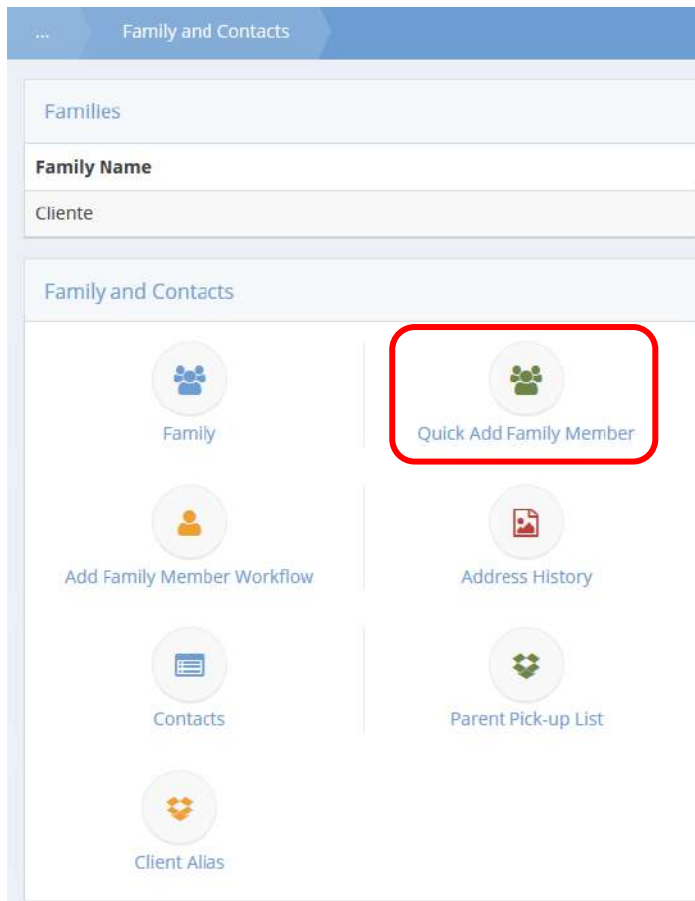
If "Yes" was selected on the previous step, the Remove Client From Family form displays. To remove, click the blue checkbox  and enter a date removed. Click the  Save button.

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.

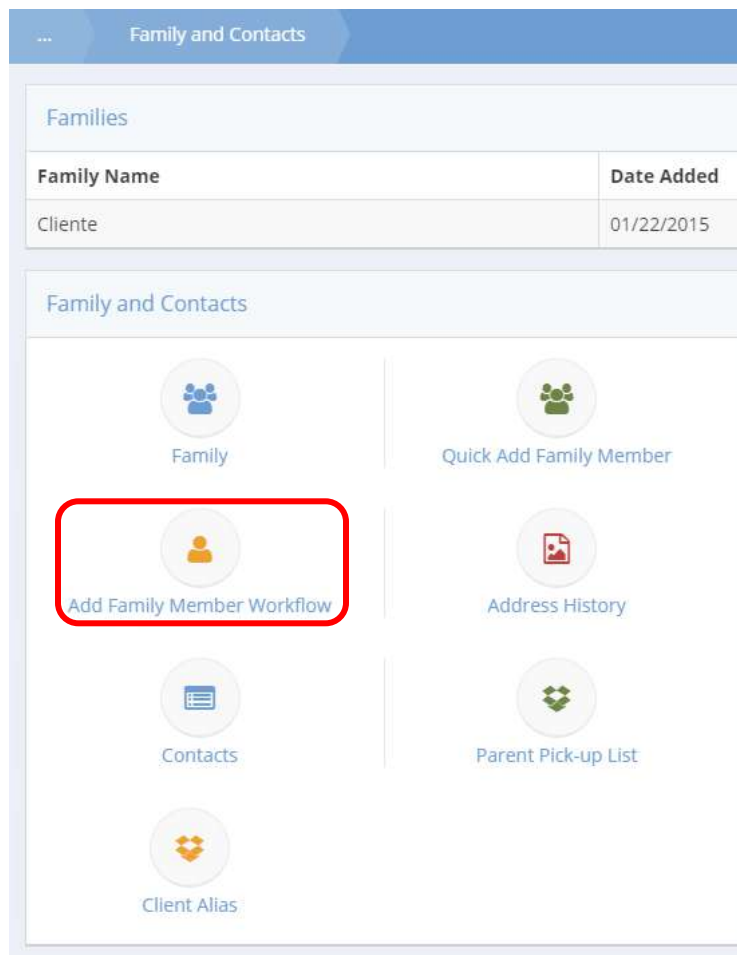
The Quick Add Family Member form displays.

The screenshot displays the CaseWorthy application interface. At the top right, a blue bar contains a '+ Add Row' button, which is highlighted with a red rectangle. Below this bar is a search bar labeled 'Search'. The main form area is divided into several sections. The top section includes fields for 'Last Name \*', 'First Name \*', 'Dupe Check' (with a 'Check For Duplicates' button highlighted in red), 'Birth Date \*', 'Gender \*', 'Age', and 'SSN'. Below these are fields for 'Ethnicity', 'Citizenship Status', 'Primary Language', 'Relation to HCH', and 'Race'. There is also a 'Choose Options...' dropdown menu. Further down, there is a checkbox for 'Is Dependent', an 'Address' button, and a 'Sharing' dropdown menu set to 'Shared'. At the bottom, there is a table with columns for 'Cliente', 'Nuevo', 'Birth Date', 'Gender', 'Age', and 'SSN'. The first row of the table contains the following data: 'Cliente', 'Nuevo', '4/1/1949', 'Male', '66', and '134-67-9825'.

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.

**Add Family Member and Enrollments**

★ Add Family Member

Demographics

○ Add Family Member to Open

Enrollment

○ Family Member Entry

Assessments

○ Question

○ Add Family Member to 2nd

Open Enrollment

○ Family Member Entry

Assessments

○ Question

○ Add Family Member to 3rd Open

Enrollment

○ Family Member Entry

Assessments

○ Question

○ Add Family Member to 4th Open

Enrollment

○ Family Member Entry

**Add Family Member Demographics**

Identifying

Last Name \*

First Name \*

Birth Date \*

SSN \*

Gender \*

Age \*

Deceased Date \*

Citizenship Status \*

Race \*

Primary Language \*

Ethnicity \*

Check For Duplicates

Next

Family Status

Address Information

Contact Information

Other Information

Cancel

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.


**Family Status**

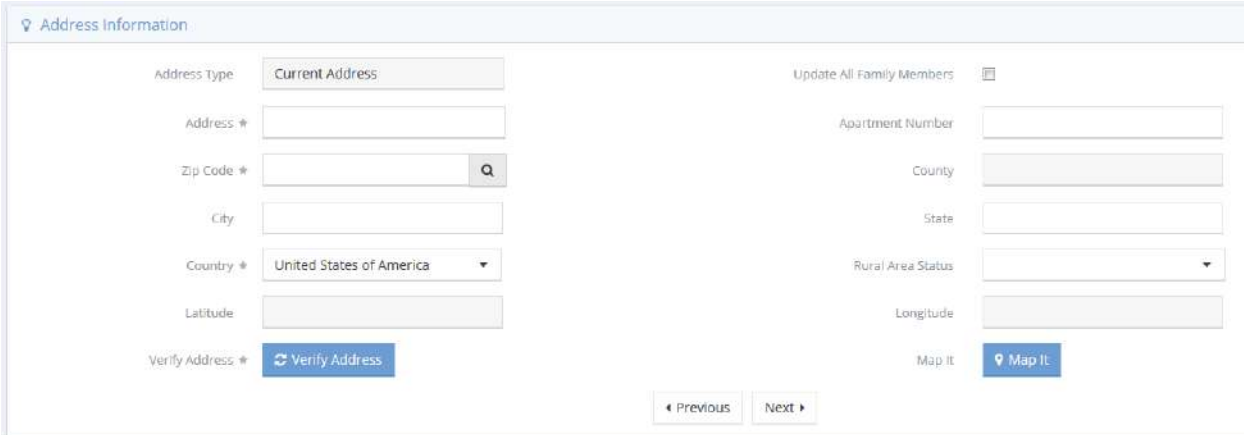
Relation to HOH \*

Family Status \*

Is Dependent



Previous Next

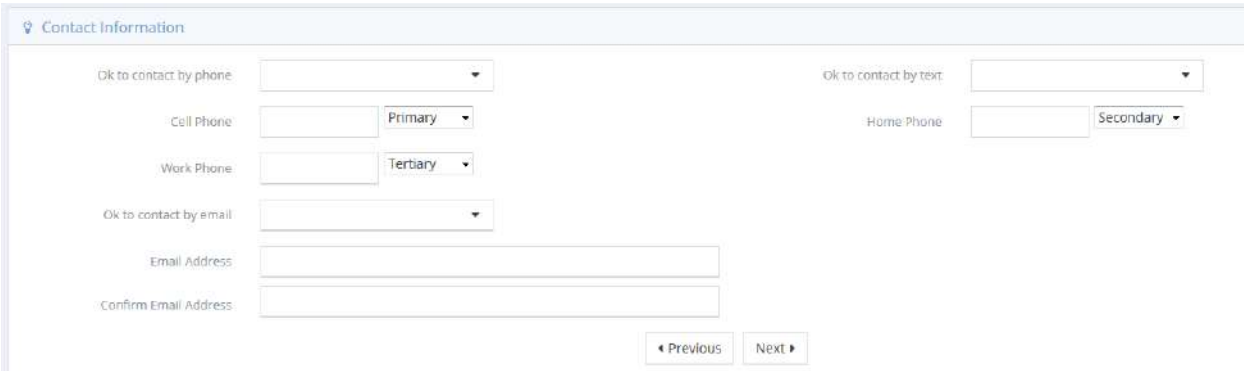
Select a relation to head of household and a family status. Click the  button.



The 'Address Information' form contains the following fields and controls:


- Address Type:** A dropdown menu with 'Current Address' selected.
- Address \***: A text input field.
- Zip Code \***: A text input field with a search icon on the right.
- City**: A text input field.
- Country \***: A dropdown menu with 'United States of America' selected.
- Latitude**: A text input field.
- Verify Address \***: A blue button with a circular arrow icon and the text 'Verify Address'.
- Update All Family Members**: A checkbox.
- Apartment Number**: A text input field.
- County**: A text input field.
- State**: A text input field.
- Rural Area Status**: A dropdown menu.
- Longitude**: A text input field.
- Map It**: A blue button with a location pin icon and the text 'Map It'.
- Navigation:** 'Previous' and 'Next' buttons at the bottom center.

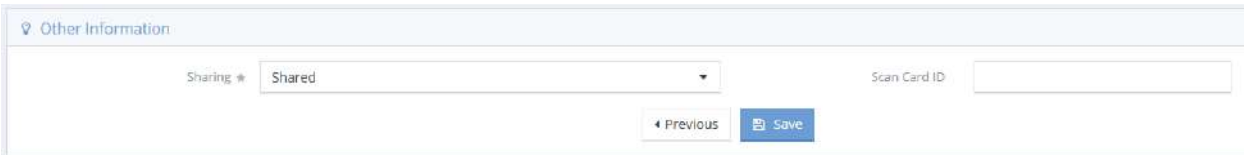
Enter an address and zip code, then click the  button. The address verification popup appears. Click on the address if correct. Click the  button.



The 'Contact Information' form contains the following fields and controls:


- Ok to contact by phone**: A dropdown menu.
- Cell Phone**: A text input field with a 'Primary' dropdown menu.
- Work Phone**: A text input field with a 'Tertiary' dropdown menu.
- Ok to contact by email**: A dropdown menu.
- Email Address**: A text input field.
- Confirm Email Address**: A text input field.
- Ok to contact by text**: A dropdown menu.
- Home Phone**: A text input field with a 'Secondary' dropdown menu.
- Navigation:** 'Previous' and 'Next' buttons at the bottom center.

Enter any available contact information and click the  button.




The 'Other Information' form contains the following fields and controls:

- Sharing \***: A dropdown menu with 'Shared' selected.
- Scan Card ID**: A text input field.
- Navigation:** 'Previous' and 'Save' buttons at the bottom center.

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



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

The screenshot shows a web form titled "Add Family Member to Open Enrollment". The form contains several fields: "Enrollment" (a dropdown menu), "Entry Date" (a date field with a calendar icon, showing 07/09/2015), "Exit Date" (a dropdown menu with "Open" selected and a calendar icon), "Provider" (a dropdown menu with "CaseWorthy" selected), "Enrollment Relation To HOH" (a dropdown menu with "Spouse" selected), "Account" (a text input field), "Schedule Follow Up" (a checkbox), and "Assign Case Manager" (a button with a calendar icon). Below these fields is a section titled "Restriction Information" with a "Restriction" dropdown menu set to "Shared".

Select an enrollment and edit all other fields as desired. Click  Save 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.

The screenshot shows a web form titled "Question". The form contains a single question: "Add another enrollment?". Below the question are two radio buttons: "Yes" and "No". The "Yes" radio button is selected.

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


The screenshot shows the 'Family and Contacts' dashboard in the CaseWorthy system. The left sidebar contains navigation options: Find Client, Add Client, Case Management (selected), Client Information, Health Management, Assessments, Family, My CaseWorthy, and Time Management. The main content area is divided into several sections:

- Families:** A table with columns: Family Name, Date Added, Date Removed, and FamilyID. It contains one entry: 'Writer, Document-1954-08-31' with Date Added '05/23/2016' and Date Removed '12/31/9999'.
- Family and Contacts:** A section with icons for Family, Add Family Member Spreadsheet, Add Family Member Workflow, Address History, Contacts, Client Alias, Parent Pick-up List, and Add New Family Workflow (highlighted with a red box).
- Family Members:** A table with columns: Birth Date, First Name, Last Name, Relationship, and Living with HH. It contains one entry: '06/31/1954', 'Document', 'Writer', 'Self', 'true'.
- Address History:** A table with columns: Address Dates, Type, and Address. It contains one entry: '05/23/2016 - 12/31/9999', 'Current Address', '777 Round St., Santaquin, UT 84655'.
- Family Financial:** A table with columns: Family Name, Family Poverty Income, Percent Of AMI, Percent Of Poverty, # in Family, Total Family Income, Total Family Expense, and Family Budget. It contains one entry: 'Writer, Document-1954-08-31', '\$200.00', '3.20%', '10.06%', '1', '\$200.00', '\$0.00', '\$200.00'.
- Family Member Enrollments:** A table with columns: Family Name, First Name, Last Name, Gender, Program Name, Begin Date, and End Date. It contains one entry: 'Writer, Document-', 'Document', 'Writer', 'Male', 'Congregate Meals', '07/28/2016', '12/31/9999'.

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


The Add New Family Workflow displays.

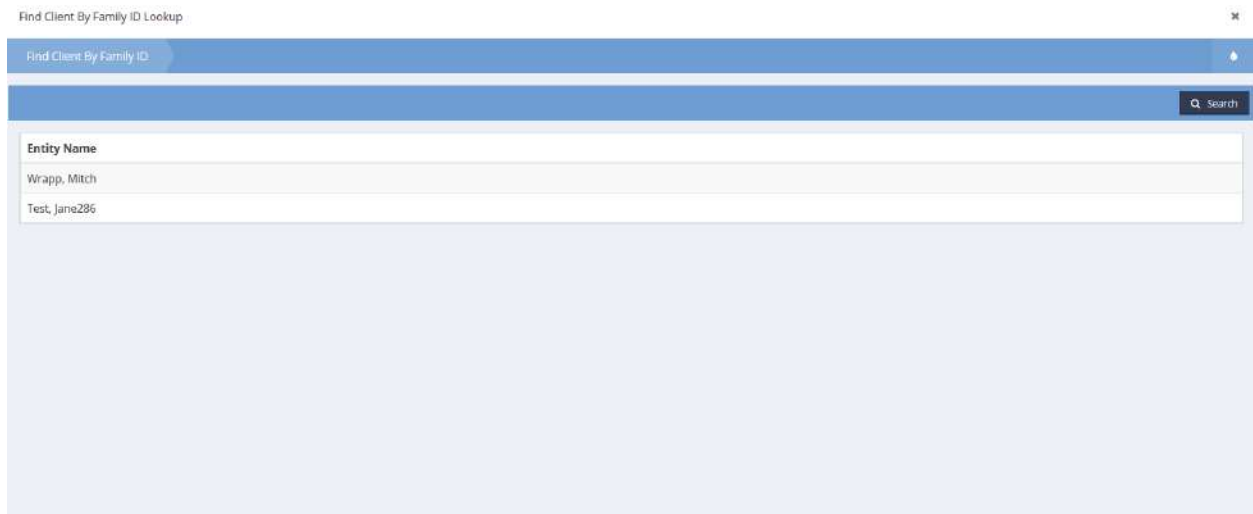
The screenshot shows the 'Add New Family' workflow form. The top navigation bar includes 'Add New Family', a menu icon, and a user profile 'Document Writer All Features'. The left sidebar has 'New Family' (selected) and 'Add Client To New Family'. The main form area has 'Family Name' and 'Primary Language' input fields. At the bottom right, there are 'Save' and 'Cancel' buttons, with the 'Save' button highlighted by a red box.

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.


The screenshot shows the 'Add Client To New Family' workflow form. The top navigation bar is the same as the previous form. The left sidebar has 'New Family' (checked) and 'Add Client To New Family' (selected). The main form area has a message: 'This Form Don't have Cancel! Button because it always need to add Member to the workflow.' Below this are fields for 'Name' (with a red box around the search icon), 'Relation To Host' (set to 'Self'), 'Date Added' (08/01/2016), 'Date Removed' (Open), 'Is Dependent' (checkbox), and 'Is Living With Host' (checked). At the bottom right, there is a 'Save' button.

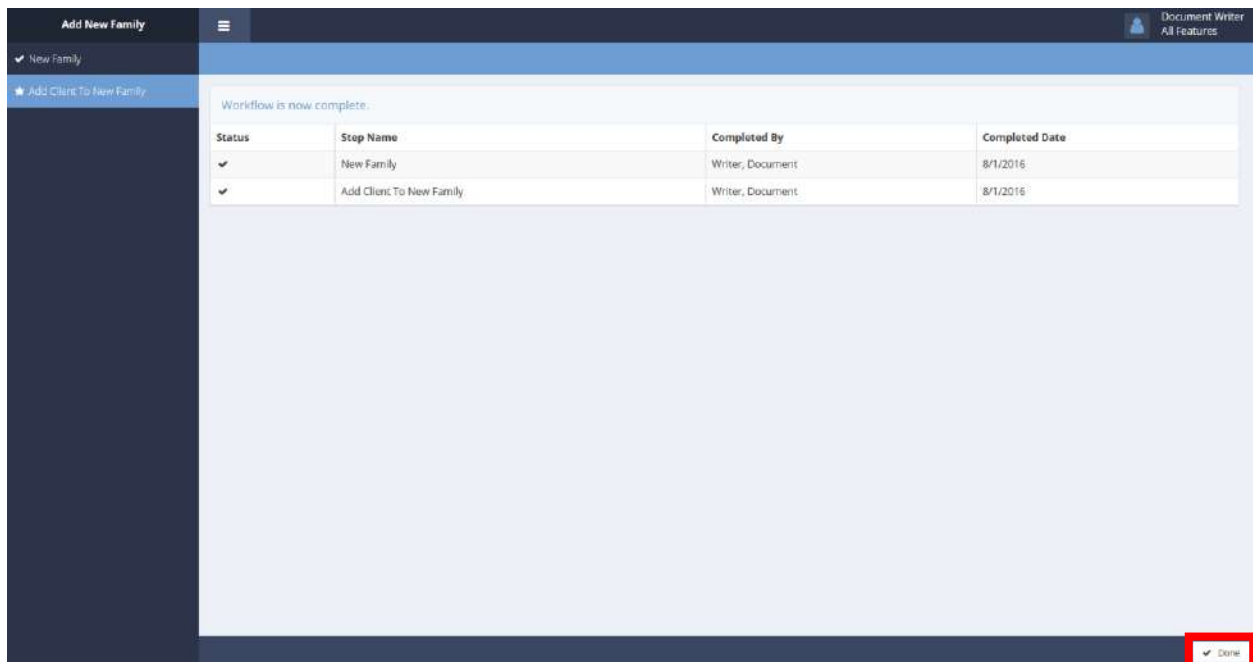
Use the magnifying glass  icon to select a client to add to the new family. The Find Client By Family ID form displays in a new pop-up window.



The screenshot shows a pop-up window titled "Find Client By Family ID Lookup". It has a search bar at the top with a magnifying glass icon and a "Search" button. Below the search bar is a table with the following data:

Entity Name
Wrapp, Mitch
Test, Jane286

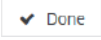
Family members in the current family display. Select a family member to add, the form closes upon selection. The family member auto populates the Name field of the previous form. Fill in the remaining fields as desired. Click the  button to save. A new screen appears, indicating completion of the workflow.



The screenshot shows the "Add New Family" workflow completion screen. It features a sidebar with navigation options: "New Family" and "Add Client To New Family". The main content area displays a message "Workflow is now complete." followed by a table showing the workflow steps:

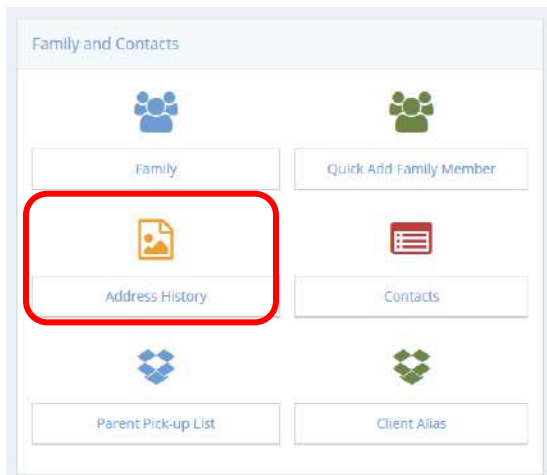
Status	Step Name	Completed By	Completed Date
✓	New Family	Writer, Document	8/1/2016
✓	Add Client To New Family	Writer, Document	8/1/2016

A "Done" button is located at the bottom right of the screen.

Click the  button to exit.





## Address History




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

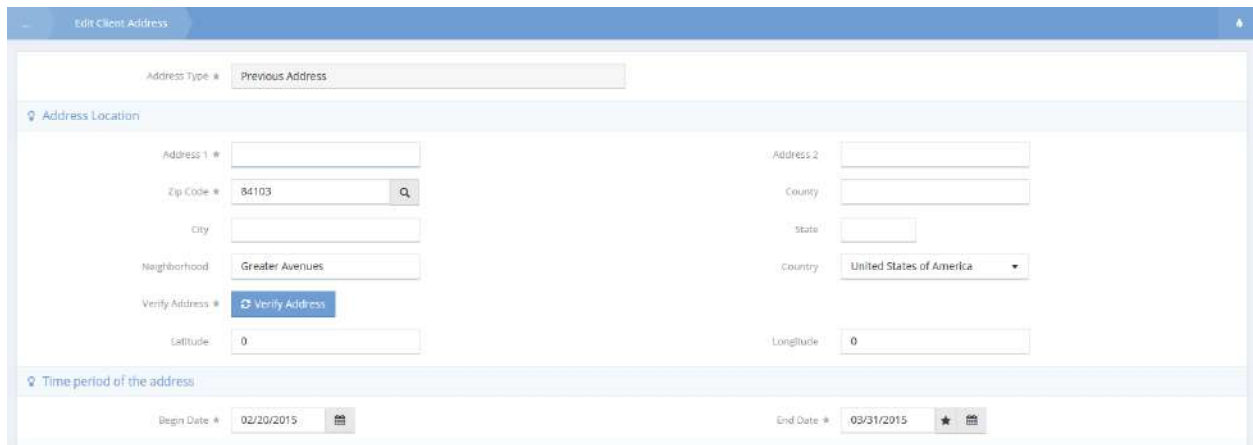
Client Address History			
Total Rows: 3			
Type	Address	Begin - End Date	Client ID
Current Address	111 notastreet, Salt Lake City, UT, 84124	3/31/2015 - Present	9956
Previous Address	..., 84103	2/20/2015 - 3/31/2015	9956
Previous Address	123 notastreet, Salt Lake City, UT, 84103	1/13/2015 - 2/20/2015	9956

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

Client Address History			
Total Rows: 3			
Type	Address	Begin - End Date	Client ID
<div>  <div> Edit Delete </div> </div>	111 notastreet, Salt Lake City, UT, 84124	3/31/2015 - Present	9956
	..., 84103	2/20/2015 - 3/31/2015	9956
	123 notastreet, Salt Lake City, UT, 84103	1/13/2015 - 2/20/2015	9956

The Client Address Edit form appears.

Make any needed alterations and click on the  Save button.



**Edit Client Address**

Address Type: Previous Address

**Address Location**

Address 1:

Address 2:

Zip Code: 84103

City:

Neighborhood: Greater Avenues

Verify Address:

Latitude: 0

Longitude: 0

Country: United States of America

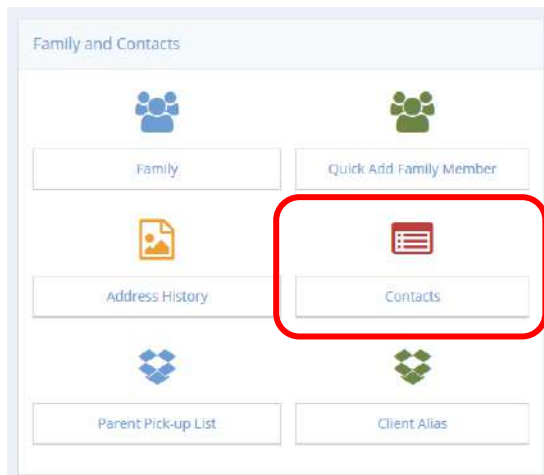
State:

**Time period of the address**

Begin Date: 02/20/2015

End Date: 03/31/2015


## Contacts



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

The screenshot shows the "Entry Contacts - Client" page. At the top right is a "+ Add New" button. Below it is a table with the following data:

Relationship	Name	Begin - End Dates	Emergency Contact	Email	Phone1 Type	Phone1	Entity ID
<a href="#">Edit</a>	Wireman, Harvey	1/8/2015 - Present	No				9881
<a href="#">Delete</a>	Biazengale, Deloras	1/8/2015 - Present	No				9882

Click [+ Add New](#) in the top right corner to create a new client contact. Click the action gear  and click Edit to edit an existing contact.

**Add New**

**Add Client Contact**

Last Name:

First Name:

Begin Date: 03/07/2017

End Date: Open

Relationship:

Birth Date:

SSN:  Full

Category: Choose Options...

**Contact Information**

Work Phone:  Primary

Cell Phone:  Secondary

Home Phone:  Tertiary

Email:

Confirm Email:

Work Phone Ext.:

Is Emergency Contact: ☐

**Address Information**

Address1:

Address2:

Zip Code:

City:

State:

County:

Latitude:

Longitude:

Verify Address:

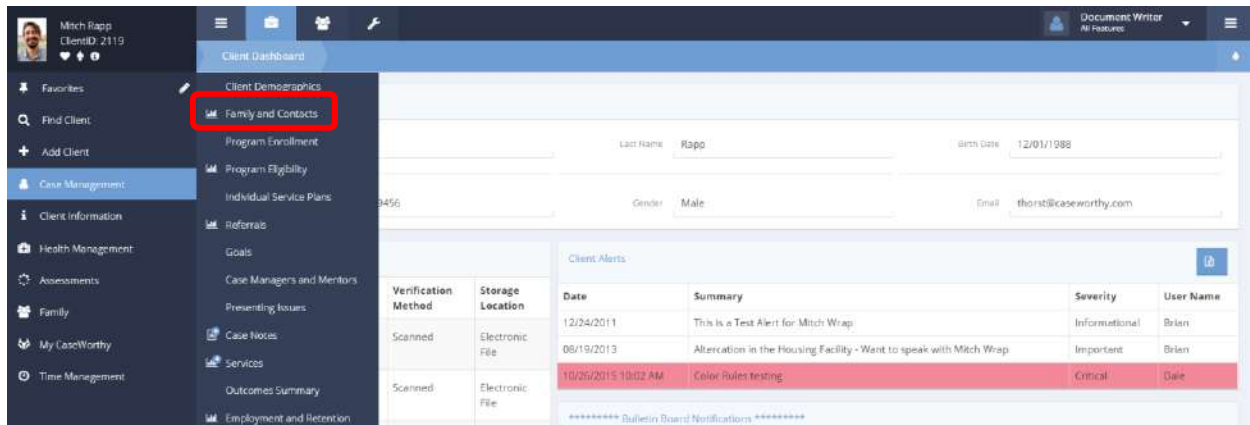
When adding or editing a new contact, select the client's relationship to the contact from the dropdown list. Use the checkbox to denote that this contact is the client's emergency contact. Add all desired information and save.



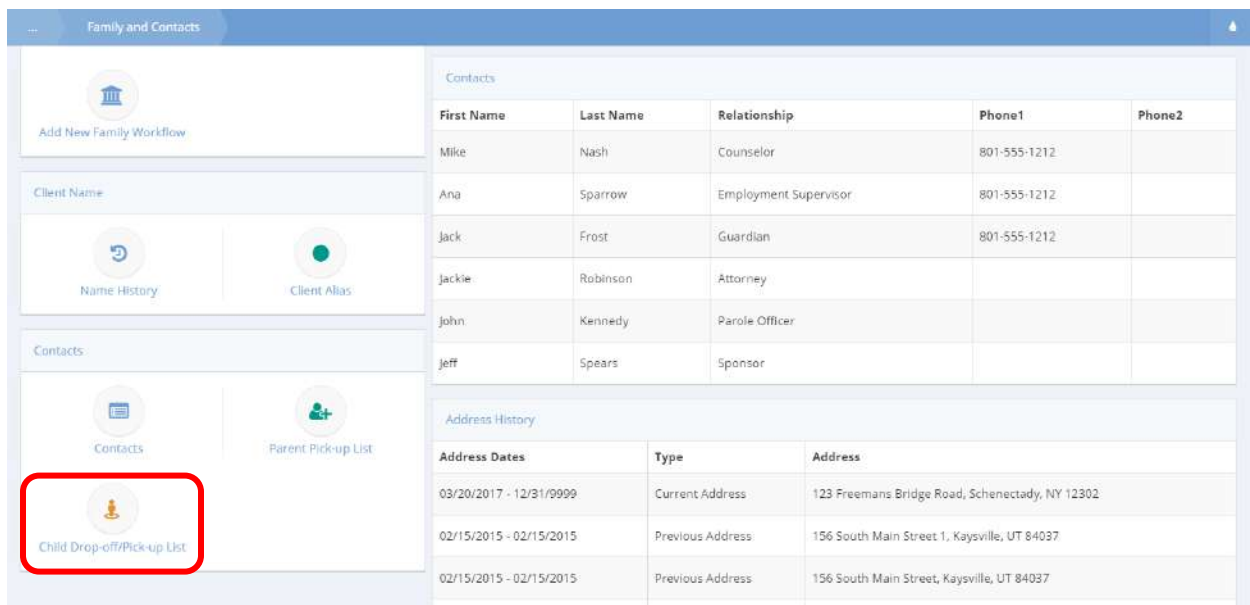
## Child Care Pick up/ Drop off

**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.


Child Care Pick up			+ Add New	
Pick up person	Begin Date	End Date		
Arden, Eldredge	5/26/2017	Open		

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

Child Care Pick up/Drop off			+ Add Row	
Pick up person	Begin Date	End Date		
<input checked="" type="checkbox"/> Arden, Eldredge	5/26/2017	Open		


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

Child Care Pick up/Drop off			+ Add Row	
Pick up person	Begin Date	End Date		
<input checked="" type="checkbox"/> <input type="text" value=""/>	09/25/2017	12/31/9999		
<input checked="" type="checkbox"/> Arden, Eldredge	5/26/2017	Open		

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


Client Look-up		
<div> <div>Filters</div> <div> <div>Program</div> <div></div> </div> </div>		
		<div> <div></div> <div>search</div> </div>

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

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



Client Look-up




Program \* TEST Program





 Search

Entry EntryName	EnrollmentMember RelationToRole	Client BirthDate	Program
Carmen, Carla	Spouse	1/1/1968 12:00:00 AM	TEST Program
Alia, Mary	Other Relative	5/16/1982 12:00:00 AM	TEST Program
Lugs, Larry	Child	1/1/1999 12:00:00 AM	TEST Program
autism@case, gary	Self	2/10/1977 12:00:00 AM	TEST Program
Arnold, Benedict	Self	1/1/2006 12:00:00 AM	TEST Program
Arnold, Billie Jo	Spouse	1/1/1977 12:00:00 AM	TEST Program
Beckster, Camille	Child	1/1/2000 12:00:00 AM	TEST Program
Latham, Green	Self	2/10/1968 12:00:00 AM	TEST Program
Latham, Green	Self	2/10/1968 12:00:00 AM	TEST Program
Arden, Eldredge	Self	1/13/2006 12:00:00 AM	TEST Program
Steve Mom, Test	Spouse	25/1/1964 12:00:00 AM	TEST Program
Jane Test2	Grandchild	1/1/2000 12:00:00 AM	TEST Program
Anderson, Jennifer	Self	8/19/2006 12:00:00 AM	TEST Program
Jane 211, Test	Self	10/1/1982 12:00:00 AM	TEST Program
Jane 101, Test	Self	5/3/1993 12:00:00 AM	TEST Program
Jane 123, Test	Self	10/1/1995 12:00:00 AM	TEST Program
Jane 123, TestChild	Child	9/8/2012 12:00:00 AM	TEST Program
Test, Jane1	Self	1/1/2000 12:00:00 AM	TEST Program
Tania, Brad	Self	5/16/1974 12:00:00 AM	TEST Program

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

Child Care Pick up/Drop off  

Pick up person	Begin Date	End Date
<input checked="" type="checkbox"/> Wazowski, Michael 	09/25/2017 	12/31/9999 
<input checked="" type="checkbox"/> Arden, Eldredge	5/26/2017	Open

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.

Individual Service Plan Summary						
Total Rows: 21						
Plan Begin - End Dates	Description	Enrolled Program	Case Manager	% Compl	# of Goals	# of Steps
12/18/2014 - 12/31/2014	plan	1 English for Employment	Eliason, Adrian		2	152
12/18/2014 - 12/19/2014	plan	09 Head Start	Eliason, Adrian		2	152
<div>  Edit            Goals and Steps            View Notes            Outcomes            Service Plan Report            Plan History            Enhanced Service Plan Report         </div>	plan	1 English for Employment	Eliason, Adrian	0	0	0
	jane	Isample prog (HIV)	Tjoe, Jane	25	2	155
	test Phase One	Isample prog (HIV)	Tjoe, Jane	0	3	183
	phase 1 Feb 23	Isample prog (HIV)	Tjoe, Jane	25	3	163
	Test Description	Adult Education	Test, QA	0	0	0
	PD	2 YAGA	Seay, Dale	0	0	0
	TEST	13 Safe Haven	Seay, Test	0	0	0
6/16/2015 - 7/15/2015	description	2 YAGA	Eliason, Adrian		0	0

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.

Service Plan Report		phase 1 Feb 23	Scheduled Reports	
<p>The following options provide specific filters of printable areas on the Service Plan. The areas default to print all areas. To suppress an area, deselect the checkbox.</p>				
Report Defaults	<input type="text"/>	<input type="button" value="Edit"/>	<input type="button" value="Save"/>	
Income & Expenses	<input type="text"/>	Plan & Goal History	<input type="text"/>	
Plan & Goal Notes	<input type="text"/>	Issues & Actions Taken	<input type="text"/>	
Service & Time	<input type="text"/>			
Include Plan Outcomes	<input checked="" type="checkbox"/>	Add Signature Line	<input checked="" type="checkbox"/>	
Include Goal Steps	<input checked="" type="checkbox"/>			
Report Details				
Program	Isample prog (HIV)	Case Manager	Tjoe	
Plan Begin Date	02/23/2015	Plan End Date	05/24/2015	

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



#### 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.

Individual Service Plan Summary

Total Rows: 21

	Plan Begin - End Dates	Description	Enrolled Program	Case Manager	% Compl	# of Goals	# of Steps
	12/18/2014 - 12/31/2014	plan	1 English for Employment	Elason, Adrian		2	152
		plan	09 Head Start	Elason, Adrian		2	152
		plan	1 English for Employment	Elason, Adrian	0	0	0
		jane	tsample prog (HIV)	Tjoe, Jane	25	2	155
		test Phase One	tsample prog (HIV)	Tjoe, Jane	0	3	183
		phase 1 Feb 23	tsample prog (HIV)	Tjoe, Jane	25	3	163
		Test Description	Adult Education	Test, QA	0	0	0
		PD	2 YAGA	Seay, Dale	0	0	0
	4/15/2015 - 4/29/2015	TEST	13 Safe Haven	Seay, Test	0	0	0

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

Enter Enrollment Service Plan

Enrollment Service Plan Dates

Begin Date: 12/18/2014 Plan Projected End Date: 12/31/2014

Copy Plan: Enter Plan Manually

Actual Completed Date:

Plan Information

Case Manager: aelason Percent Complete:

Plan Description: plan

Progress Note

Initial Case Note: Case Note

Post Follow-up or Outcome:

Case Note and Signature(s):

Add Signature

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

Progress Note

Progress Note Summary (ISP)

Total Rows: 2

Created Date	Created By	Type	Progress Note Summary
1/15/2015 8:26 AM	Elason, Adrian	Service Plan	summary
1/15/2015 8:28 AM	Elason, Adrian	Service Plan	description

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

Progress Note

Enter Case Note

Template: [dropdown] Type: Goal / Progress Notes

Summary: [text field]

Note Description: [rich text editor]

Sharing: shared Program Involvement: [dropdown]

Read Only: [checkbox]

JunctionCaseNoteContextTypeID: 5


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 yhihtk cdra	_CEAP / Utility Assistance	Tjoe, Jane		3	171
	10/3/2013 - 10/3/2013	lkjlpock	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							
	<ul style="list-style-type: none"> <li>Edit</li> <li>Goals and Steps</li> <li>View Notes</li> <li><b>Outcomes</b></li> <li>Service Plan Report</li> <li>Plan History</li> <li>Enhanced Service Plan Report</li> </ul>	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.

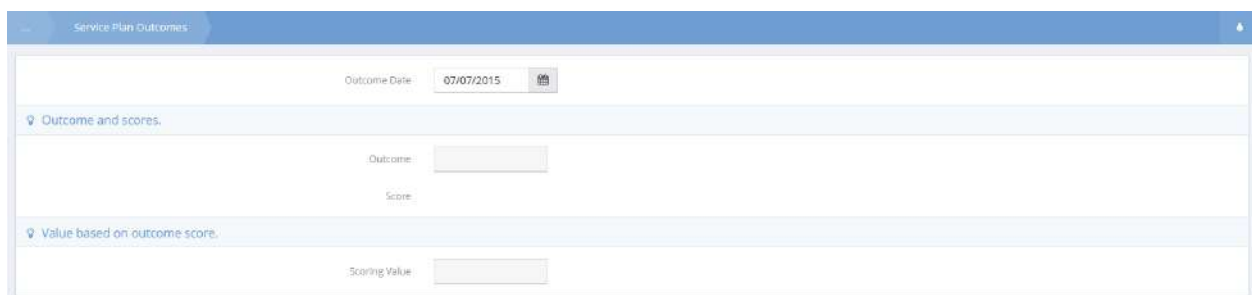
Service Plan Outcomes				
Total Rows: 2				
Outcome Date/Time	Outcome	Score	Short Description	Scoring Value
2/20/2012 12:00 AM	Adult Education		Has high school diploma/GED	1.00
2/20/2012 12:00 AM	Adult Education		Has high school diploma/GED	1.00

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



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

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



Service Plan Outcomes

Outcome Date: 07/07/2015

Outcome and scores.

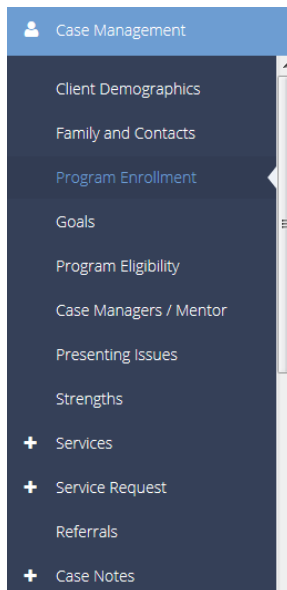
Outcome:

Score:

Value based on outcome score.

Scoring Value:

## 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.

Status	Program   Assigned Case Mgr	Program Entry - Exit	Enrollment Member End Date	CM Assignment Dates	Eligibility Rules	Family	Program ID	Enroll ID	Enrollment Family ID
Assessments Pending	COC Rapid Re-Housing	1/18/2016 - Present	Present			Lucy,Evelina-1950-01-01	316	16137	1172
Enrolled	Test	12/31/2015 - Present	Present			Lucy,Evelina-1950-01-01	307	16135	1172
Assessments Pending	ss Prevention	12/17/2015 - Present	Present			Lucy,Evelina-1950-01-01	314	16132	1172

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

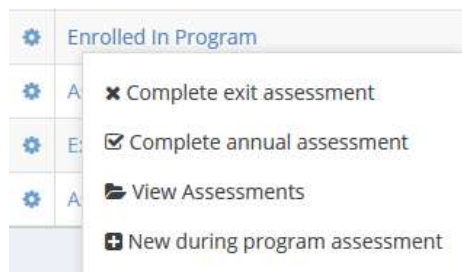
The user can schedule an enrollment follow up appointment by clicking on the "Schedule Follow Up" check box. A pop-up window appears.

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.

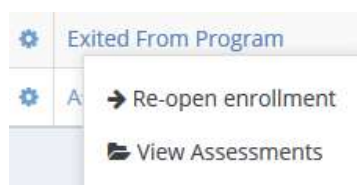
Once an enrollment has been entered, the user can click on the enrollment status to complete tasks related to the enrollment. If the enrollment status is "Assessments Pending" the user can launch a workflow to complete the required exit assessments.




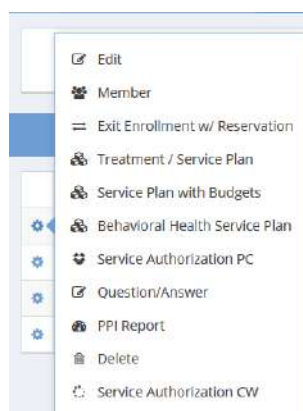
If the status is “Enrolled in Program” the user can launch workflows to complete “during program” assessments or to exit all enrolled family members.



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

**Edit Enrollment**

By clicking save, all members' assessments and enrollments with the same entry or exit date will be adjusted to the Begin and End Date entered on this form. Clients with different dates will be adjusted to an earlier or later date as necessary.

Family: Bosell,Steve-1969-01-22

Program Name: Adult Education

Enrollment Status: Enrolled in Program

Account: [Dropdown]

Program Entry Date: 01/23/2015

Program Exit Date: Present

Restriction: Shared

**Summary Enrollment Information:**

Organization: CaseWorthy

Provider Name: CaseWorthy

## 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.


**Enrollment Summary** + Add New

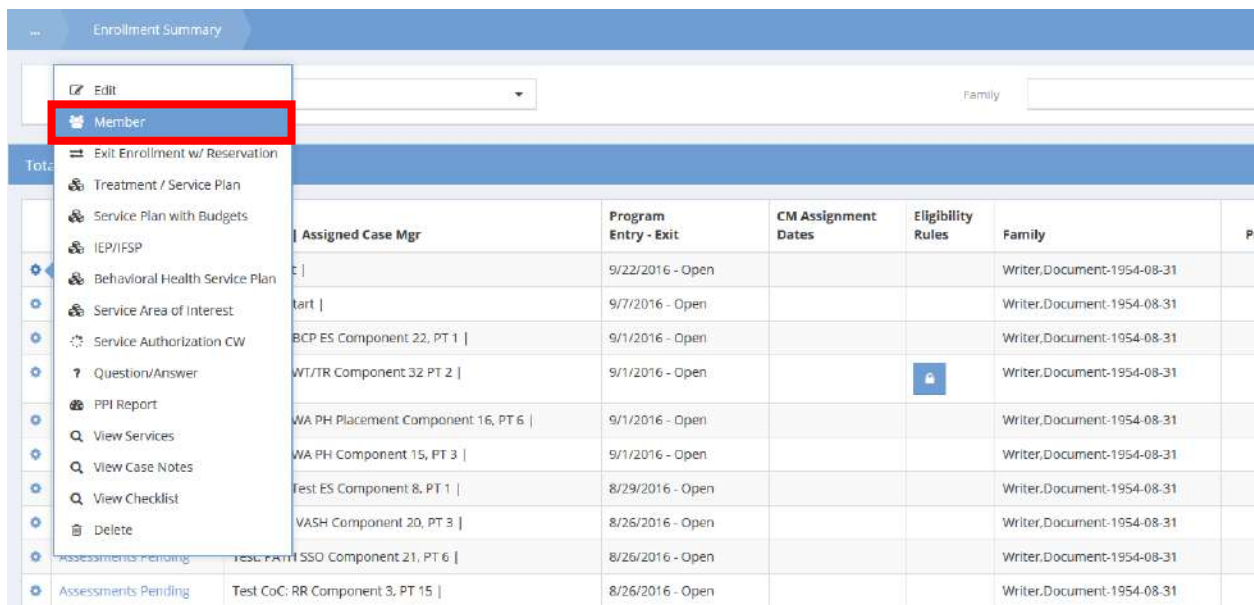
Status: [Dropdown] Family: [Dropdown]

Total Rows: 19 Search

	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 YASH 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

+ Done

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



Enrollment Summary

Family

Member

Exit Enrollment w/ Reservation

Treatment / Service Plan

Service Plan with Budgets

IEP/IISP

Behavioral Health Service Plan

Service Area of Interest

Service Authorization CW

Question/Answer

PPI Report

View Services

View Case Notes

View Checklist

Delete

Assigned Case Mgr	Program Entry - Exit	CM Assignment Dates	Eligibility Rules	Family	Pi
...	9/22/2016 - Open			Writer, Document-1954-08-31	
...	9/7/2016 - Open			Writer, Document-1954-08-31	
BCP ES Component 22, PT 1	9/1/2016 - Open			Writer, Document-1954-08-31	
WT/TR Component 32, PT 2	9/1/2016 - Open			Writer, Document-1954-08-31	
WA PH Placement Component 16, PT 6	9/1/2016 - Open			Writer, Document-1954-08-31	
WA PH Component 15, PT 3	9/1/2016 - Open			Writer, Document-1954-08-31	
Test ES Component 8, PT 1	8/29/2016 - Open			Writer, Document-1954-08-31	
VASH Component 20, PT 3	8/26/2016 - Open			Writer, Document-1954-08-31	
Test CoC: RR Component 3, PT 15	8/26/2016 - Open			Writer, Document-1954-08-31	

The Enrollment Members for Case Management form displays.



Enrollment Members for Case Management

+ Add / Edit Members

Client	Provider	Program Entry - Exit Dates	Restriction	Exit Type	MemberID
Writer, Document	CaseWorthy	9/22/2016 - Open	Shared		20329

Click the  button. The Enrollment Members form displays.




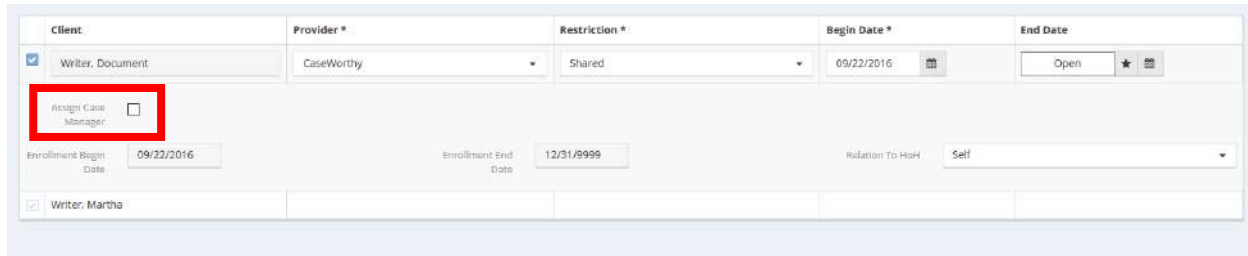
Enrollment Members

Member enrollment dates must either fall between or be equal to the enrollment begin and end dates for the HOH.

Choose the family members you want to include in this enrollment from the list below.

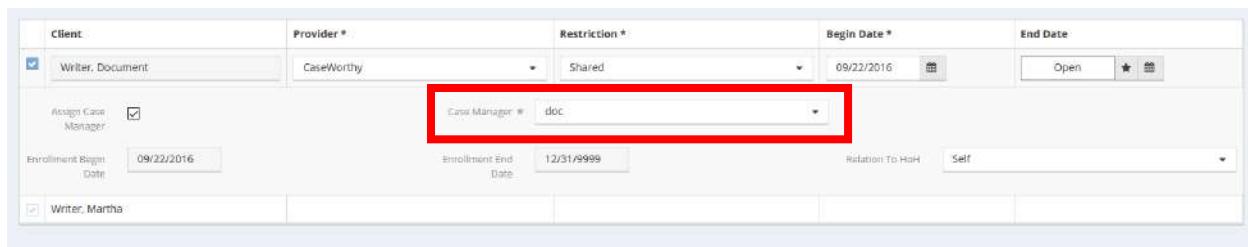
Client	Provider *	Restriction *	Begin Date *	End Date
<input checked="" type="checkbox"/> Writer, Document	CaseWorthy	Shared	9/22/2016	Open
<input type="checkbox"/> Writer, Martha				

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




The screenshot shows a table with columns: Client, Provider \*, Restriction \*, Begin Date \*, and End Date. The first row is expanded, showing details for 'Writer, Document'. The 'Assign Case Manager' checkbox is highlighted with a red box. Below the table, there are fields for 'Enrollment Begin Date' (09/22/2016), 'Enrollment End Date' (12/31/9999), and 'Relation To HSH' (Self). A 'Writer, Martha' row is visible below the expanded row.

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




The screenshot shows the same table as the previous image, but the 'Assign Case Manager' checkbox is now checked. The 'Case Manager' dropdown menu is highlighted with a red box and shows the value 'doc'. The 'Enrollment Begin Date' (09/22/2016), 'Enrollment End Date' (12/31/9999), and 'Relation To HSH' (Self) fields are still visible.

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.

Enrollment Summary
















Add New

Status


Family

Total Rows: 19

Search

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 CW7/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 YASH Component 20, PT 3	8/26/2016 - Open			Writer,Document-1954-08-31	289	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

Done

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

The screenshot shows the 'Enrollment Summary' page. A dropdown menu is open, and the 'Member' option is highlighted with a red rectangle. The menu includes options like 'Edit', 'Member', 'Exit Enrollment w/ Reservation', 'Treatment / Service Plan', 'Service Plan with Budgets', 'IEP/IISP', 'Behavioral Health Service Plan', 'Service Area of Interest', 'Service Authorization CW', 'Question/Answer', 'PPI Report', 'View Services', 'View Case Notes', 'View Checklist', and 'Delete'. The background table lists enrollment details for various components.

Assigned Case Mgr	Program Entry - Exit	CM Assignment Dates	Eligibility Rules	Family	P
...	9/22/2016 - Open			Writer, Document-1954-08-31	
...	9/7/2016 - Open			Writer, Document-1954-08-31	
BCP ES Component 22, PT 1	9/1/2016 - Open			Writer, Document-1954-08-31	
WT/TR Component 32, PT 2	9/1/2016 - Open			Writer, Document-1954-08-31	
WA PH Placement Component 16, PT 6	9/1/2016 - Open			Writer, Document-1954-08-31	
WA PH Component 15, PT 3	9/1/2016 - Open			Writer, Document-1954-08-31	
Test ES Component 8, PT 1	8/29/2016 - Open			Writer, Document-1954-08-31	
VASH Component 20, PT 3	8/26/2016 - Open			Writer, Document-1954-08-31	
Test ES SSO Component 21, PT 6	8/26/2016 - Open			Writer, Document-1954-08-31	
Test CoC: RR Component 3, PT 15	8/26/2016 - Open			Writer, Document-1954-08-31	

The enrollment Members for Case Management form displays.

The screenshot shows the 'Enrollment Members for Case Management' table. It has columns for Client, Provider, Program Entry - Exit Dates, Restriction, Exit Type, and MemberID. The data row shows 'Marsh, Scott' as the client, 'CaseWorthy' as the provider, and '3/17/2017 - 3/17/2017' as the dates.

Client	Provider	Program Entry - Exit Dates	Restriction	Exit Type	MemberID
Marsh, Scott	CaseWorthy	3/17/2017 - 3/17/2017	Shared		25656

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 screenshot shows the 'Define Exit Date' form. It includes fields for Name (Marsh, Scott), Program Name (09 Head Start), Enrollment Status (Enrolled in Program), Begin Date (03/17/2017), and Exit Date (03/17/2017). The Exit Date field has a calendar icon next to it.

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

Exit Enrollment w/ Reservation

Question

Exit whole family? \*Family\* Exit Member only? \*Member\*

☐ Family

☐ Member

☐ Cancel

## Treatment/Service Plan

Enrollment Service Plan Summary


The following list represents Client Service Plans that are linked to a specific Enrollment.

Plan Begin - End Dates	Description	Plan Type	Case Manager	Case Note	% Complete	Plan ID
1/23/2015 - 1/30/2015	description	Initial	adrian		0.00 %	1345

## Goals

**Objective:** View or edit goals for a service plan.

Enrollment Summary				+ Add New	
Status: <input type="text"/>				Search	
Status	Program   Assigned Case Mgr	Program Entry - Exit Dates	Enroll ID		
Assessments Pending	12 Permanent Housing for Homeless Disabled	1/7/2015 - Present	9982		
Enrolled in Program	1 English for Employment	1/7/2015 - Present	9981		
Assessments Pending	09 Head Start	1/7/2015 - Present	9980		
Assessments Pending	Isample prog (HIV)	1/7/2015 - Present	9979		

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.)

Enrollment Summary

+ Add New

Edit

Member

Treatment / Service Plan

Service Plan Management

Behavioral Health Service Plan

Service Authorization PC

Question/Answer

PPI Report

Delete

Service Authorization CW

Status


Search

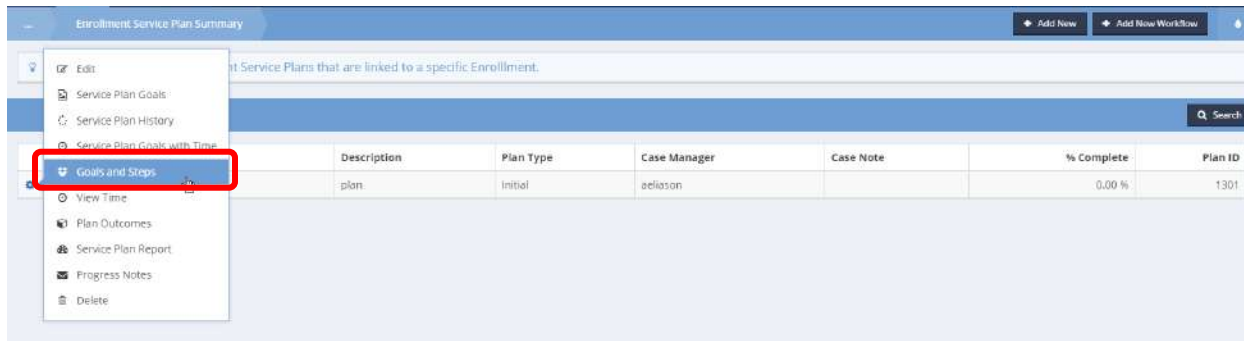
Program   Assigned Case Mgr	Program Entry - Exit Dates	Enroll ID
1 English for Employment   user, test	12/18/2014 - 12/19/2014	9926
09 Head Start   user, test	12/18/2014 - Present	9925
HUD Test Project	8/25/2014 - Present	8315

The Enrollment Service Plan Summary form opens.

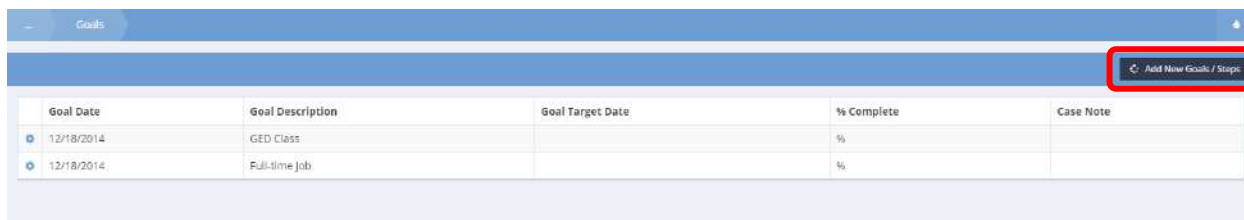
Enrollment Service Plan Summary							+ Add New	+ Add New Workflow	
The following list represents Client Service Plans that are linked to a specific Enrollment.							Search		
Plan Begin - End Dates	Description	Plan Type	Case Manager	Case Note	% Complete	Plan ID			
1/7/2015 - 1/14/2015	plan	Initial	aedason		0.00 %	1315			



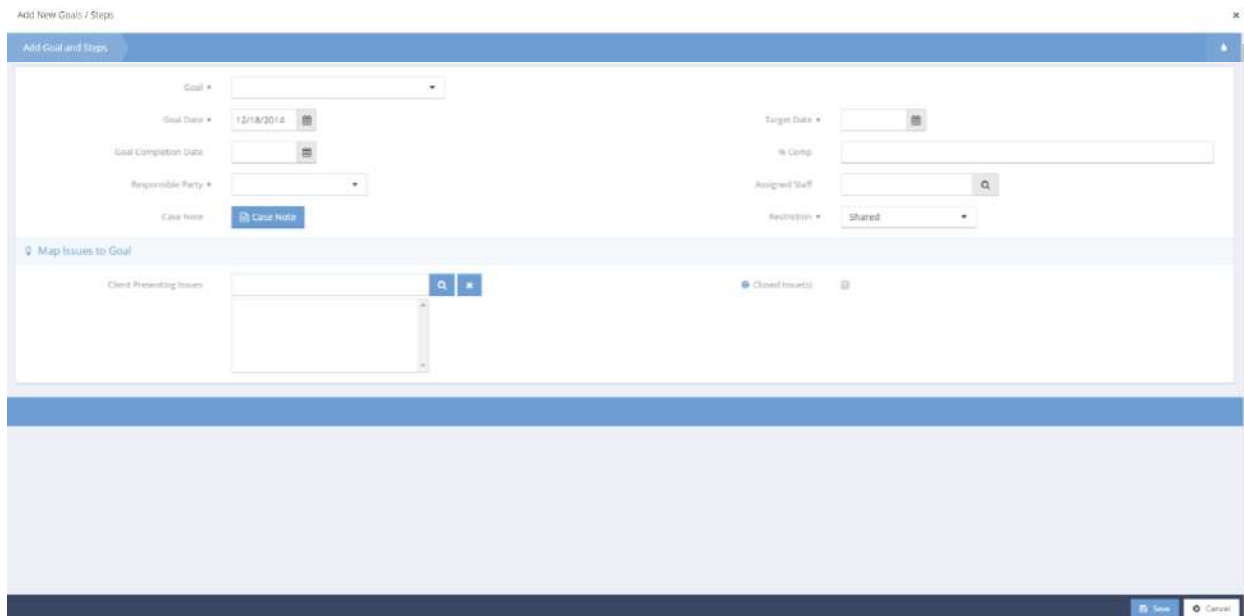
Click the action gear  icon for the desired service plan and select Goals and Steps from the pop up menu that appears.



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.

Enrollment Summary				+ Add New	
Status: <input type="text"/>				Search	
Status	Program   Assigned Case Mgr	Program Entry - Exit Dates	Enroll ID		
Assessments Pending	12 Permanent Housing for Homeless Disabled	1/7/2015 - Present	9982		
Enrolled in Program	1 English for Employment	1/7/2015 - Present	9981		
Assessments Pending	09 Head Start	1/7/2015 - Present	9980		
Assessments Pending	sample prog (PHV)	1/7/2015 - Present	9979		

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.

Enrollment Summary				+ Add New	
Status: <input type="text"/>				Search	
<ul style="list-style-type: none"> <li>Edit</li> <li>Member</li> <li>Exit Enrollment w/ Reservation</li> <li>Treatment / Service Plan</li> <li>Service Plan with Budgets</li> <li>Behavioral Health Service Plan</li> <li>Service Authorization PC</li> <li>Question/Answer</li> <li>PPI Report</li> <li>Delete</li> <li><b>Service Authorization CW</b></li> </ul>	Program   Assigned Case Mgr	Program Entry - Exit Dates	Enroll ID		
	CC Other Basic Needs	12/19/2014 - Present	9929		
	CC Health Related Services	12/2/2014 - Present	9799		
	21 Tenant-based Rental Assistance (TRA)	11/26/2014 - Present	9783		
	1 English for Employment	11/25/2014 - 11/26/2014	9779		
	HUD Test Project	11/25/2014 - Present	9778		

The Service Authorization CW Summary form displays.

Service Authorization CW

+ Add New

WF\_ProgramID

150

Description	Begin - End Dates	Account	Authorization Date - ID	Authorized Service Provider	ID

Click the **+ Add New** button.


The Eligibility Rule form displays.

The screenshot shows the 'Eligibility rule' form. The form is titled 'Eligibility rule' in a blue header bar. Below the header, there is a large white area containing several input fields and dropdown menus. The fields are arranged in two columns. The left column contains: 'Description' (a text input field), 'Begin Date' (a date input field with a calendar icon, showing '01/05/2015'), 'Account' (a dropdown menu), 'Service' (a dropdown menu with 'Choose Options...' selected), and 'State Authorization ID' (a text input field). The right column contains: 'End Date' (a date input field with a calendar icon), 'Authorized Service Provider' (a dropdown menu), and 'State Authorization Date' (a date input field with a calendar icon). Below the form area, there is a blue bar with a red-bordered button labeled '+ Add Row'. At the bottom right of the form, there are two buttons: 'Save' and 'Cancel'.


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

A row appears in the spreadsheet below.

Measurement Method *	Frequency *	Maximum Times per Frequency	Maximum Cumulative Amount
<input checked="" type="checkbox"/> Each / Times	Monthly (30 - Days)		

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

Description	Begin - End Dates	Account	Authorization Date - ID	Authorized Service Provider	ID
 description	1/5/2015 - 1/14/2015	_Gas Account			16


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


Description	Begin - End Dates	Account	Authorization Date - ID	Authorized Service Provider	ID
 description	1/5/2015 - 1/14/2015	_Gas Account			16

+ Edit

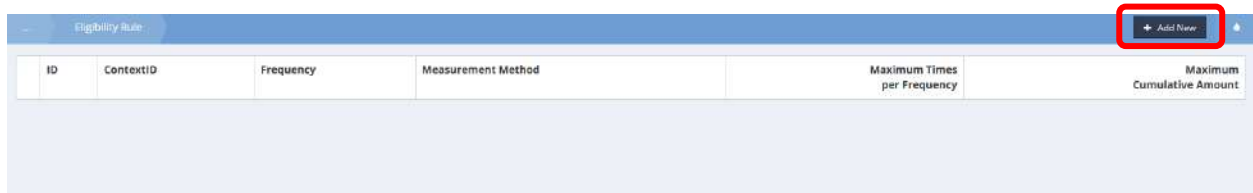
+ Eligibility Rule

The Eligibility Rule form displays.

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

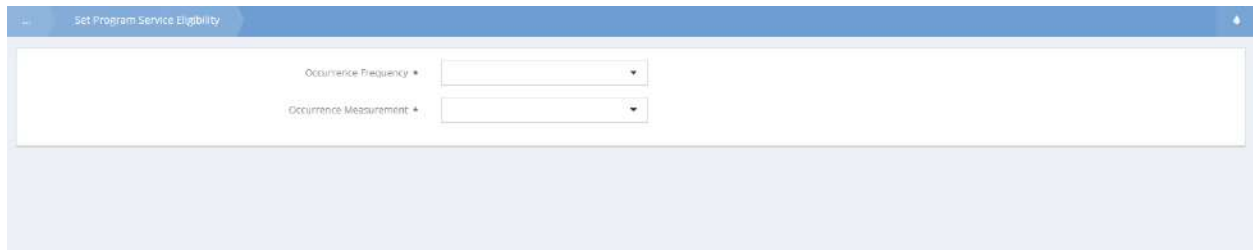
To add or edit eligibility rules click the action gear  associated with the desired service authorization and select Eligibility Rule from the pop up menu that appears.

The Authorization Eligibility Rule form displays.



ID	ContextID	Frequency	Measurement Method	Maximum Times per Frequency	Maximum Cumulative Amount
----	-----------	-----------	--------------------	-----------------------------	---------------------------

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.

Enrollment Summary				+ Add New	
Status					
				Search	
Status	Program   Assigned Case Mgr	Program Entry - Exit Dates	Enroll ID		
Assessments Pending	CCP Employment	12/30/2014 - Present	9944		
Enrolled in Program	CC Other Basic Needs	12/19/2014 - Present	9929		
Assessments Pending	CC Health Related Services	12/2/2014 - Present	9799		
Assessments Pending	21 Tenant-based Rental Assistance (TRA)	11/26/2014 - Present	9783		
Exited From Program	1 English for Employment	11/25/2014 - 11/26/2014	9779		
Assessments Pending	HUD Test Project	11/25/2014 - Present	9778		

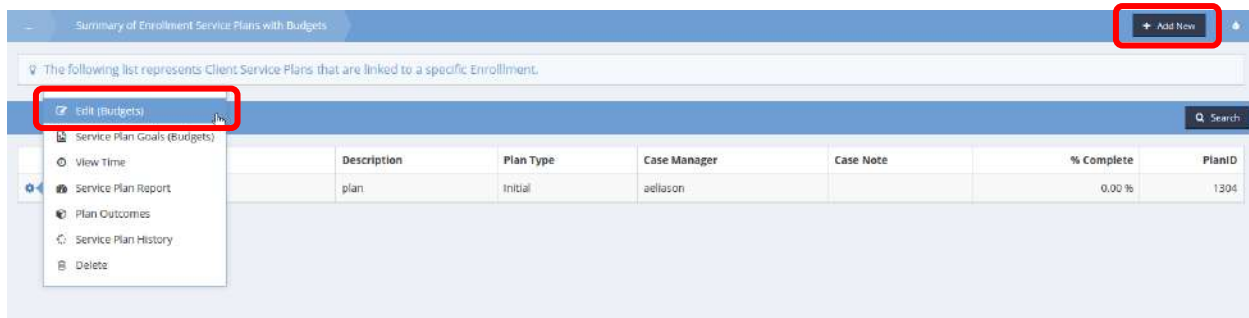
On the Enrollment Summary form, click the action gear  associated with the desired program and select Service Plan with Budgets from the pop up menu that appears.

Enrollment Summary				+ Add New	
Status					
				Search	
<ul style="list-style-type: none"> <li>Edit</li> <li>Member</li> <li>Exit Enrollment w/ Reservation</li> <li>Treatment &amp; Service Plan</li> <li><b>Service Plan with Budgets</b></li> <li>Behavioral Health Service Plan</li> <li>Service Authorization PC</li> <li>Question/Answer</li> <li>PPI Report</li> <li>Delete</li> <li>Service Authorization CW</li> </ul>	Program   Assigned Case Mgr	Program Entry - Exit Dates	Enroll ID		
	CC Other Basic Needs	12/19/2014 - Present	9929		
	CC Health Related Services	12/2/2014 - Present	9799		
	21 Tenant-based Rental Assistance (TRA)	11/26/2014 - Present	9783		
	1 English for Employment	11/25/2014 - 11/26/2014	9779		
	HUD Test Project	11/25/2014 - Present	9778		

The Summary of Enrollment Service Plans with Budgets form displays.

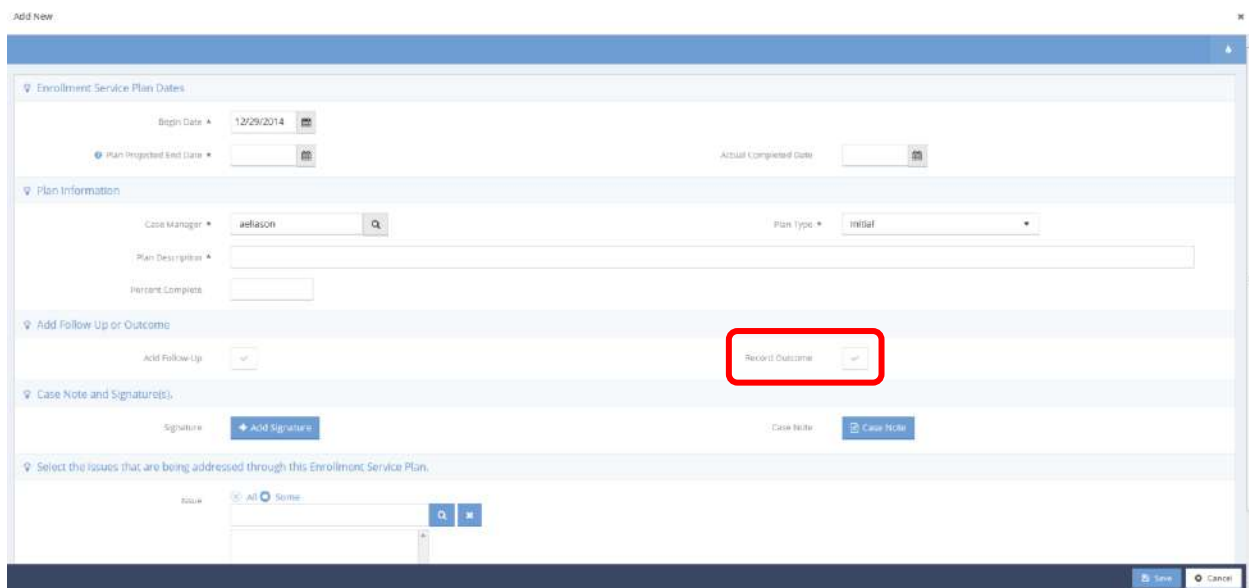
Summary of Enrollment Service Plans with Budgets							+ Add New	
The following list represents Client Service Plans that are linked to a specific Enrollment.								
							Search	
Plan Begin - End Dates	Description	Plan Type	Case Manager	Case Note	% Complete	PlanID		
1/7/2015 - 1/14/2015	plan	Initial	aeliason		0.00 %	1315		

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.



Description	Plan Type	Case Manager	Case Note	% Complete	PlanID
plan	Initial	aellason		0.00 %	1304

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.

Enrollment Summary				+ Add New	
Status <input type="text"/>					
Status	Program   Assigned Case Mgr	Program Entry - Exit Dates	Enroll ID		
Assessments Pending	CCP Employment	12/30/2014 - Present	9944		
Enrolled in Program	CC Other Basic Needs	12/19/2014 - Present	9929		
Assessments Pending	CC Health Related Services	12/2/2014 - Present	9799		
Assessments Pending	21 Tenant-based Rental Assistance (TRA)	11/26/2014 - Present	9783		
Exited From Program	1 English for Employment	11/25/2014 - 11/26/2014	9779		
Assessments Pending	HUD Test Project	11/25/2014 - Present	9778		

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.

Enrollment Summary

+ Add New

Edit

Member

Exit Enrollment w/ Reservation

Treatment / Service Plan

Service Plan with Budgets

Behavioral Health Service Plan

Service Authorization PC

Question/Answer

PPI Report

Delete


Service Authorization CW


Status

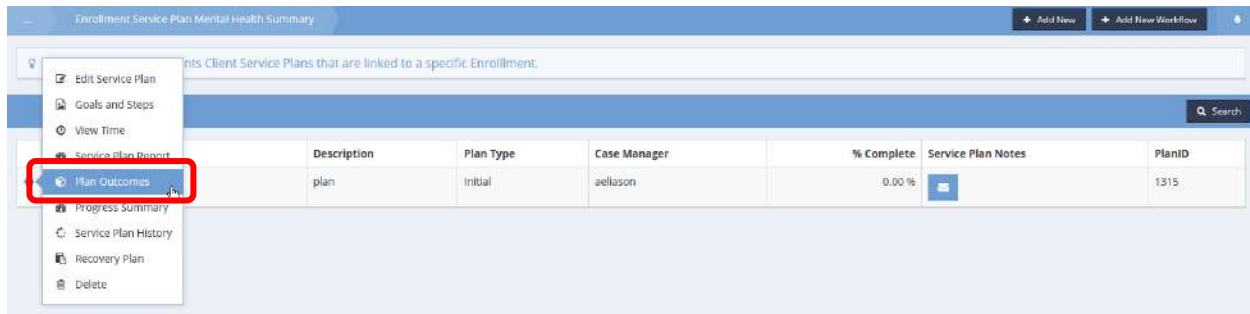
Search

Program   Assigned Case Mgr	Program Entry - Exit Dates	Enroll ID
CC Other Basic Needs	12/19/2014 - Present	9929
CC Health Related Services	12/2/2014 - Present	9799
21 Tenant-based Rental Assistance (TRA)	11/26/2014 - Present	9783
1 English for Employment	11/25/2014 - 11/26/2014	9779
HUD Test Project	11/25/2014 - Present	9778

The Enrollment Service Plan Mental Health Summary form displays.

Enrollment Service Plan Mental Health Summary							+ Add New	+ Add New Workflow	
The following list represents Client Service Plans that are linked to a specific Enrollment.									
Plan Begin - End Dates	Description	Plan Type	Case Manager	% Complete	Service Plan Notes	PlanID			
1/7/2015 - 1/14/2015	plan	Initial	acliason	0.00 %		1315			

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



Enrollment Service Plan Mental Health Summary

Ints Client Service Plans that are linked to a specific Enrollment.

Description	Plan Type	Case Manager	% Complete	Service Plan Notes	PlanID
plan	Initial	aellason	0.00 %		1315

The Service Plan Outcomes Summary displays.



Service Plan Outcomes

Outcome Date	Outcome	Score Short Description	Scoring Value
--------------	---------	-------------------------	---------------

Click the **+ Add New** button. The Service Plan Outcomes form displays.



Service Plan Outcomes

Choose the specific Outcome by selecting the reference next to the outcome date and then select the appropriate score.

Outcome Date	Outcome	Score
<input checked="" type="checkbox"/>	Income	
<input type="checkbox"/>	Employment	
<input type="checkbox"/>	Adult Education	
<input type="checkbox"/>	Employment Placement	
<input type="checkbox"/>	Employment Retention	
<input type="checkbox"/>	Self Sufficiency Through Employment	

Click the clear checkbox ☐ next to an outcome.

The row expands.

Service Plan Outcomes

Choose the specific Outcome by selecting the reference next to the outcome date and then select the appropriate score.

Outcome Date	Outcome	Score
12/30/2014	Income	<input checked="" type="checkbox"/> No income <input checked="" type="checkbox"/> Inadequate income <input type="checkbox"/> Basic needs with assistance <input type="checkbox"/> Basic needs without assistance <input type="checkbox"/> Income is sufficient + discretionary income <input type="checkbox"/> Don't Know <input type="checkbox"/> Refused
	Employment	

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.

Service Plan Outcomes

Outcome Date	Outcome	Score Short Description	Scoring Value
1/7/2015	Employment	No job	1.00
1/7/2015	Employment Placement	With out placement	1.00

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

Service Plan Outcomes

Outcome Date	Outcome	Score Short Description	Scoring Value
1/7/2015	Employment	No job	1.00
1/7/2015	Employment Placement	With out placement	1.00

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

Service Plan Outcomes

Outcome Date: 01/07/2015

Outcome and scores:

Outcome: Employment Placement

Score: ☒ Placed in employment  
☒ With out placement

Value based on outcome score:


Scoring Value: 1.00

## Goal Plan Summary – Workflow

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

The screenshot shows the 'Enrollment Summary' form. At the top, there is a 'Status' dropdown menu. Below it is a search bar. A table displays enrollment data:


Status	Program   Assigned Case Mgr	Program Entry - Exit Dates	Enroll ID
Assessments Pending	13 Safe Haven	12/31/2014 - Present	9962

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 screenshot shows the 'Enrollment Summary' form with a dropdown menu open for the first row. The menu options are: Edit, Member, Treatment / Service Plan, Service Plan with Budgets, Behavioral Health Service Plan (highlighted with a red box), Service Authorization PC, Question/Answer, PPI Report, Delete, and Service Authorization CW.

The Enrollment Service Plan Mental Health Summary displays.


The screenshot shows the 'Enrollment Service Plan Mental Health Summary' form. At the top, there are buttons for '+ Add New' and '+ Add New Workflow' (highlighted with a red box). Below is a search bar and a table displaying service plan data:

Plan Begin - End Dates	Description	Plan Type	Case Manager	% Complete	Service Plan Notes	PlanID
12/31/2014 - 1/21/2015	plan	Initial	aeliason	0.00 %		1309
12/31/2014 - 1/21/2015	plan	Initial	aeliason	0.00 %		1310


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

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

The screenshot shows the 'Mental Health Service Plan' workflow form. The left sidebar contains a menu with options: 'Mental Health Service Plan', 'Add Service Plan Goal and Steps', 'Question', 'Goal Plan Summary - Workflow', and 'Service Plan Report'. The main form area is titled 'Mental Health Service Plan (input)' and includes sections for 'Enrollment Service Plan Dates', 'Plan Information', 'Case Note and Signature(s)', and 'Select the issues that are being addressed through this Enrollment Service Plan'. The 'Enrollment Service Plan Dates' section has fields for 'Begin Date' (12/31/2014), 'Plan End Date', and 'Actual Completed Date'. The 'Plan Information' section has fields for 'Case Manager' (adellson), 'Plan Type' (Initial), 'Plan Description', and 'Percent Complete'. The 'Case Note and Signature(s)' section has a 'Signature' field and an 'Add Signature' button. The 'Select the issues that are being addressed through this Enrollment Service Plan' section has a table with 'Issue' and 'Add' buttons. At the bottom right are 'Save' and 'Cancel' buttons.

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  Save button. Add Service Plan Goal and Steps, the next step in the workflow, displays.

The screenshot shows the 'Add Service Plan Goal and Steps' form. The top section has fields for 'Goal' (with a red box around the drop-down arrow), 'Goal Date' (04/10/2015), 'Target Date', 'Goal Completion Date', '% Comp' (0), 'Responsible Party', 'Assigned Staff', 'Case Note' (with a 'Case Note' button), and 'Restriction' (Shared). The bottom section is titled 'Map Issues to Goal' and has a table with 'Client Presenting Issues' and 'Add Issue(s)' buttons. At the bottom right are 'Save', 'Cancel', and 'Save/Add New Goal' buttons.

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.

Total Rows: 5						
	Step Order	Step Description	Step Date	Target Date	Status	Completion Date
<input checked="" type="checkbox"/>	1	Open Checking Account				
<input checked="" type="checkbox"/>	2	Open Savings Account				
<input checked="" type="checkbox"/>	4	30 days clean				

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.

**Service Plan**

- ✓ Mental Health Service Plan
- ★ Add Service Plan Goal and Steps
- Question
- Goal Plan Summary - Workflow
- Service Plan Report

### Add Service Plan Goal and Steps

Goal *	<input type="text"/>				
Goal Date *	<input type="text" value="12/31/2014"/>	<input type="button" value="📅"/>	Target Date *	<input type="text"/>	<input type="button" value="📅"/>
Goal Completion Date *	<input type="text"/>	<input type="button" value="📅"/>	% Comp.	<input type="text"/>	
Responsible Party *	<input type="text"/>			Assigned Staff	<input type="text"/> 🔍
Case Note	<input type="button" value="📝 Case Note"/>			Restrictions *	<input type="text" value="Shared"/> ▼




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Map Issues to Goal

Client Presenting Issues:


🔍 ✕

(Close 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  to finish or click  to add another goal.

The next form in the workflow, Question, appears.

The screenshot shows the 'Question' form within the 'Service Plan' workflow. The left sidebar lists the workflow steps: 'Mental Health Service Plan', 'Add Service Plan Goal and Steps', 'Question' (highlighted), 'Goal Plan Summary - Workflow', and 'Service Plan Report'. The main content area displays the question 'Do you want to print the service plan?' with two radio button options: 'Yes' and 'No'. A 'Save' button is located at the bottom left of the form.

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.

The screenshot shows the 'Goal Plan Summary - Workflow' form. The left sidebar highlights 'Goal Plan Summary - Workflow'. The main content area displays a table of client goals. A red box highlights the 'Progress Notes' column, which contains a document icon.

Goal Description	Goal Target Date	Goal Date	Hours Budget	Hours Used	Progress Notes	Steps
\$50 savings	1/7/2015	12/31/2014	0.00	0.00		
Total: 0.00			Total: 0.00			

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

The screenshot shows the 'Progress Notes' form. The top right corner features a red box around the '+ Add New' button. Below this, there are 'Print Selected' and 'Print All' buttons. The main content area is a table with columns: 'Preview', 'Goal Description', 'Goal Target Date', 'Case Note Summary', and 'Case Note Reference Date'.

Click the  Add New button to add a new note.

An Add New form displays.

Summary

Template

Reference Date: 12/31/2014


Note Description

Sharing: Shared

Read Only

Program Enrollment


Save Cancel

Enter summary and reference dates (required) select a template and enter case notes. Click  Save when finished. The Progress Notes form displays again.


Progress Notes

Add New

Print Selected Print All

Preview	Goal Description	Goal Target Date	Case Note Summary	Case Note Reference Date
	\$50 savings	1/7/2015	note	12/31/2014

Done

Click  Done when finished viewing.



The Goal Plan Summary – Workflow form displays again.

Service Plan

Mental Health Service Plan

(input)

Add Service Plan Goal and Steps


Question

Goal Plan Summary - Workflow

Goal Plan Summary - Workflow

The following list represents Client Goals that are linked to a specific Service Plan.


Goal Description	Goal Target Date	Goal Date	Hours Budget	Hours Used	Progress Notes	Steps
\$50 savings	1/7/2015	12/31/2014	0.00	0.00		
			Total: 0.00	Total: 0.00		

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

Steps

Total Rows: 5

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

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

Service Plan

Mental Health Service Plan

(input)

Add Service Plan Goal and Steps


Question

Goal Plan Summary - Workflow

Goal Plan Summary - Workflow

The following list represents Client Goals that are linked to a specific Service Plan.

Goal Description	Goal Target Date	Goal Date	Hours Budget	Hours Used	Progress Notes	Steps
\$50 savings	1/7/2015	12/31/2014	0.00	0.00		
			Total: 0.00	Total: 0.00		

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

Service Plan

Mental Health Service Plan

(input)

Add Service Plan Goal and Steps

Question

Goal Plan Summary - Workflow


Workflow is now complete.

Step Order	Step Description	Completed By	Completed Date
✓	Mental Health Service Plan (input)	Elason, Adrian	12/31/2014
✓	Add Service Plan Goal and Steps	Elason, Adrian	12/31/2014
✓	Question	Elason, Adrian	12/31/2014
✓	Goal Plan Summary - Workflow	Elason, Adrian	12/31/2014

## Add Service Plan Goal and Steps

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

Enrollment Summary				+ Add New	
Status: <input type="text"/>					
Status	Program   Assigned Case Mgr	Program Entry - Exit Dates	Enroll ID		
Enrolled In Program	Adult Education	1/5/2015 - Present	9971		
Enrolled In Program	CC Immigration	12/31/2014 - Present	9965		
Assessments Pending	13 Safe Haven	12/31/2014 - Present	9962		

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.

Enrollment Summary

+ Add New

Status:

Edit

Member

Treatment / Service Plan

Service Plan with Subjects

Behavioral Health Service Plan

Service Authorization

Question/Answer


PPI Report


Delete

Program   Assigned Case Mgr	Program Entry - Exit Dates	Enroll ID
Adult Education	12/15/2014 - Present	9865
09 Head Start	12/15/2014 - Present	9864

Search

The Enrollment Service Plan Mental Health Summary form displays.

Enrollment Service Plan Mental Health Summary							+ Add New	+ Add New Workflow	
The following list represents Client Service Plans that are linked to a specific Enrollment.									
Plan Begin - End Dates	Description	Plan Type	Case Manager	% Complete	Service Plan Notes	PlanID			
1/6/2015 - 1/14/2015	plan	Initial	adelason	0.00 %		1311			

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



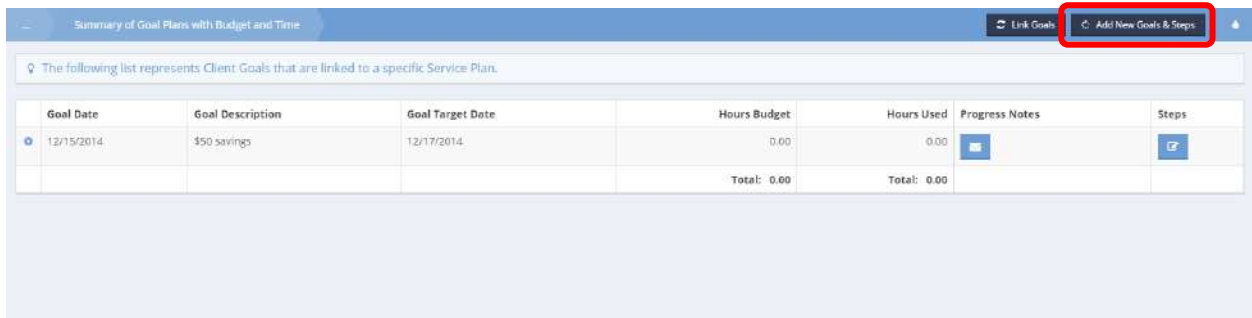
Enrollment Service Plan Mental Health Summary

Client Service Plans that are linked to a specific Enrollment.

Goals and Steps

Description	Plan Type	Case Manager	% Complete	Service Plan Notes	PlanID
bjk	Initial	aellason	0.00 %		1297


The Goal Plan with Budget & Time Summary displays.

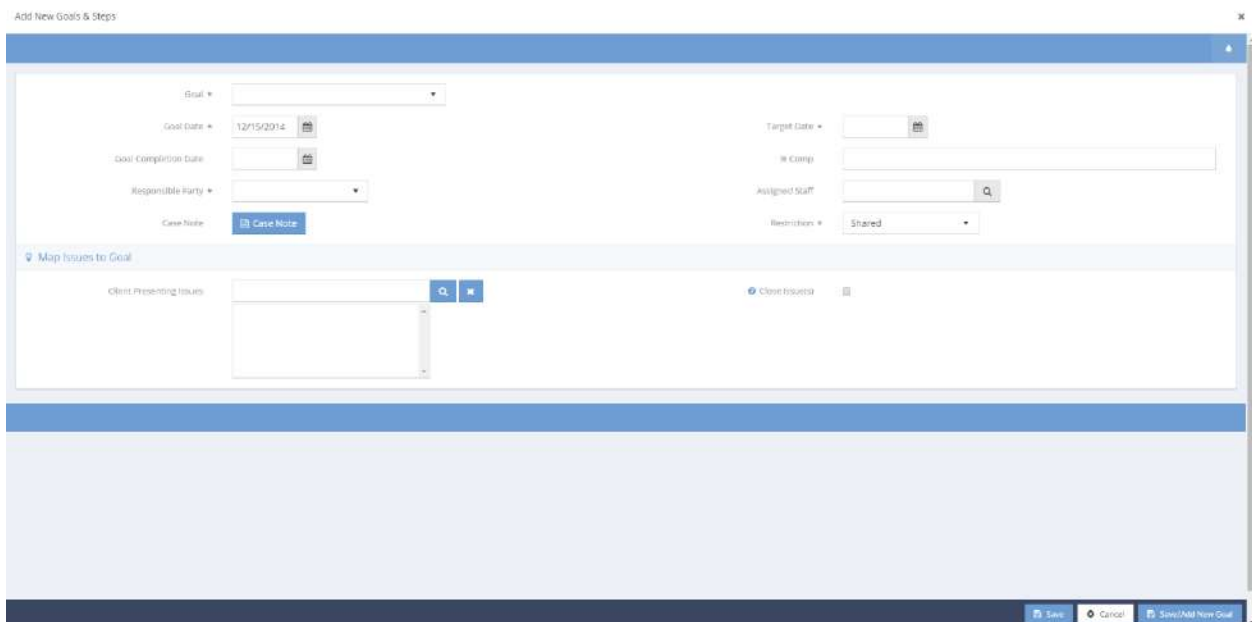


Summary of Goal Plans with Budget and Time

The following list represents Client Goals that are linked to a specific Service Plan.

Goal Date	Goal Description	Goal Target Date	Hours Budget	Hours Used	Progress Notes	Steps
12/15/2014	\$50 savings	12/17/2014	0.00	0.00		
Total:			0.00	0.00		

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



Add New Goals & Steps

Goal:

Goal Date: 12/15/2014

Goal Completion Date:

Responsible Party:

Case Note:

Target Date:

% Comp:

Assigned Staff:

Restrictions: Shared

Map Issues to Goal

Client Presenting Issues:

Client Issues:

Save Cancel Save/Add New Goal

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

Summary of Goal Plans with Budget and Time

This collection lists contingent Client Goals that are linked to a specific Service Plan.

Goal Description	Goal Target Date	Hours Budget	Hours Used	Progress Notes	Steps
\$50 Savings	12/19/2014	0.00	0.00		
Total:		0.00	0.00		

Outcomes

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

Client Goal Outcomes Summary

Created Date	Outcome	Short Description	Scoring Value
12/15/2014	Income	No Income	1.0


## Edit Case Note with Reference Date

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

Enrollment Summary

Status:


Status	Program   Assigned Case Mgr	Program Entry - Exit Dates	Enroll ID
Enrolled In Program	Adult Education	1/5/2015 - Present	9971
Enrolled In Program	CC Immigration	12/31/2014 - Present	9965
Assessments Pending	13 Safe Haven	12/31/2014 - Present	9962

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 screenshot shows the 'Enrollment Summary' page. A dropdown menu is open, listing various actions: Edit, Member, Treatment / Service Plan, Service Plan with Burden, Behavioral Health Service Plan (highlighted with a red box), Service Authorization, Question/Answer, PPI Report, and Delete. The background table lists enrollment details.

Program   Assigned Case Mgr	Program Entry - Exit Dates	Enroll ID
Shelter Plus Care	12/12/2014 - Present	9855
Family Support	12/12/2014 - Present	9854
1 English for Employment	12/12/2014 - 12/13/2014	9853


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


The screenshot shows the 'Enrollment Service Plan Mental Health Summary' page. A table lists client service plans. The 'Service Plan Notes' column for the first row contains a notes icon (a blue square with a white notepad and pencil), which is highlighted with a red box.

Plan Begin - End Dates	Description	Plan Type	Case Manager	% Complete	Service Plan Notes	PlanID
12/15/2014 - 12/17/2014	a plan	Initial	aellason	0.00 %		1294
12/15/2014 - 12/16/2014	vhj	Initial	aellason	0.00 %		1295


The Service Plan Case Notes Summary form displays.


The screenshot shows the 'Service Plan Case Notes Summary' page. A table lists service plans. The 'Preview' column for the first row contains a preview icon (a blue square with a white magnifying glass), which is highlighted with a red box.

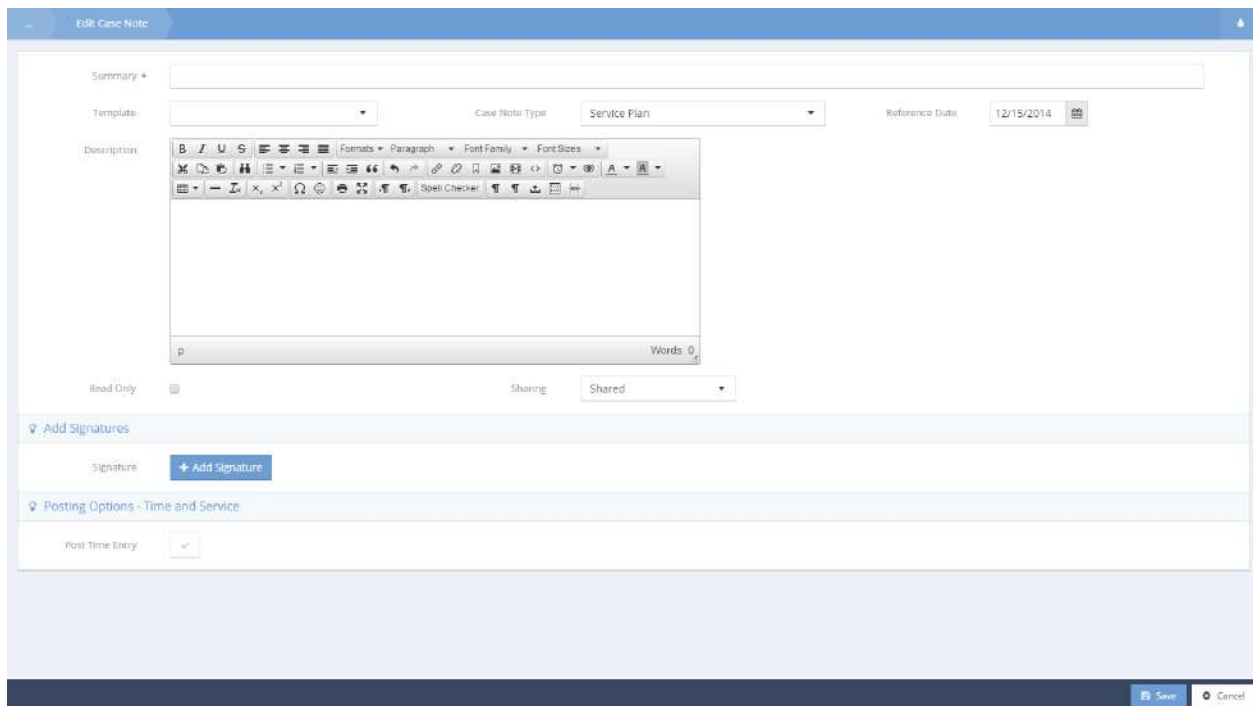
Preview	Service Plan	Case Note Summary	Case Note Reference Date
	plan	note	1/6/2015

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

The screenshot shows the 'Service Plan Case Notes Summary' page. A dropdown menu is open for the first row, listing actions: Edit (highlighted with a red box), Add New, and Delete. The background table lists service plans.

Preview	Service Plan	Case Note Summary	Case Note Reference Date
	a plan	a note	12/15/2014

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



The screenshot shows the 'Edit Case Note' form. At the top, there's a blue header bar with the title 'Edit Case Note'. Below the header, the form is divided into several sections. The 'Summary' section has a text input field. The 'Template' section has a dropdown menu. The 'Case Note Type' section has a dropdown menu set to 'Service Plan'. The 'Reference Date' section has a date input field set to '12/15/2014'. The 'Description' section features a rich text editor with a toolbar containing various formatting options like bold, italic, underline, and font color. Below the text editor, there's a 'Words' counter showing '0'. The 'Read Only' section has a checkbox. The 'Sharing' section has a dropdown menu set to 'Shared'. Below these sections, there's a 'Add Signatures' section with a 'Signature' label and an 'Add Signature' button. The 'Posting Options - Time and Service' section has a 'Post Time Entry' dropdown menu. At the bottom right of the form, there are 'Save' and 'Cancel' buttons.

## Service Plan Progress Reporting

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

Enrollment Summary


+ Add New

Family

Status

Search

Status	Program   Assigned Case Mgr	Program Entry - Exit Dates	Case Manager Assignment Dates	Elig. Rules Not Met	Program ID	Enrc
Enrolled	Common Intake	4/16/2015 - Present			179	1
Assessments Pending	CEAP   Household Crisis	4/15/2015 - Present			97	1
Exited	Weatherization Assistance	4/13/2015 - 4/14/2015			131	1
Assessments Pending	12 Permanent Housing for Homeless Disabled	4/13/2015 - Present			42	1
Enrolled	CC Refugee Reception & Placement	3/19/2015 - Present			136	1
Enrolled	CC Pregnancy	3/18/2015 - Present			138	1
Enrolled	CC Emergency Services	3/18/2015 - Present			147	1
Enrolled	CC Adoption	3/18/2015 - Present			139	1

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

Enrollment Summary

+ Add New

Family


Status

Search


<div> <div>Edit</div> <div>Member</div> <div>Exit Enrollment w/ Reservation</div> <div>Treatment / Service Plan</div> <div>Service Plan with Budgets</div> <div>Behavioral Health Service Plan</div> <div>Service Authorization CW</div> <div>Service Authorization PC</div> <div>Question/Answer</div> <div>PPI Report</div> <div>Delete</div> </div>	<div>Program   Assigned Case Mgr</div> <div>Common Intake  </div> <div>AP   Household Crisis  </div> <div>Weatherization Assistance  </div> <div>Permanent Housing for Homeless Disabled  </div> <div>Refugee Reception &amp; Placement  </div> <div>Pregnancy  </div> <div>Emergency Services  </div> <div>Adoption  </div> <div>AF  </div> <div>program   Eliason, Adrian</div>	<div>Program Entry - Exit Dates</div> <div>4/16/2015 - Present</div> <div>4/15/2015 - Present</div> <div>4/13/2015 - 4/14/2015</div> <div>4/13/2015 - Present</div> <div>3/19/2015 - Present</div> <div>3/18/2015 - Present</div> <div>3/18/2015 - Present</div> <div>3/18/2015 - Present</div> <div>3/18/2015 - Present</div> <div>3/9/2015 - Present</div>	<div>Case Manager Assignment Dates</div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div>3/9/2015 - Present</div>	<div>Elig. Rules Not Met</div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div>	<div>Program ID</div> <div>179</div> <div>97</div> <div>131</div> <div>42</div> <div>136</div> <div>138</div> <div>147</div> <div>139</div> <div>137</div> <div>102</div>	<div>Enrc</div> <div>1</div> <div>1</div> <div>1</div> <div>1</div> <div>1</div> <div>1</div> <div>1</div> <div>1</div> <div>1</div> <div>1</div>
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The Enrollment Service Plan Mental Health Summary form displays.


Enrollment Service Plan Mental Health Summary						
The following list represents Client Service Plans that are linked to a specific Enrollment.						
Total Rows: 1						
Plan Begin - End Dates	Description	Plan Type	Case Manager	% Complete	Service Plan Notes	Plan
3/31/2015 - 4/2/2015	description	Initial	aellason	50.00 %		14

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

Service Plan Case Notes Summary			
 			
Total Rows: 2			
Preview	Service Plan	Case Note Summary	Case Note Reference Date
 	description	note 1	4/16/2015
 	description	note 2	4/16/2015

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

Enrollment Service Plan Mental Health Summary						
The following list represents Client Service Plans that are linked to a specific Enrollment.						
Total Rows: 1						
Plan Begin - End Dates	Description	Plan Type	Case Manager	% Complete	Service Plan Notes	Plan ID
3/31/2015 - 4/2/2015	description	Initial	aellason	0.00 %		1462



- Edit Service Plan
- Goals and Steps
- View Time
- Service Plan Report
- Plan Outcomes
- Progress Summary**
- Service Plan History
- Recovery Plan
- Delete
- Service Plan Test
- Test Recovery Plan





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.

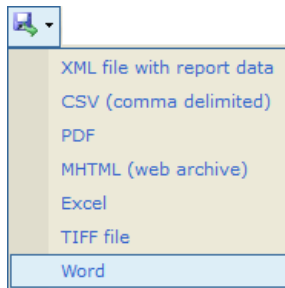
To create a Service Plan Report, from the Mental Health Service Plan form, click on the action gear icon associated with the desired service plan. Select Service Plan Report from the pop up menu that appears.

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.

Family Member   Presenting Issue	Action Taken
April Bosell	
	Created a tailored Service Plan, beginning on 2014-12-15
Steve Bosell	
	Created a tailored Service Plan, beginning on 2015-01-23
	Created a tailored Service Plan, beginning on 2015-02-16
	Created a tailored Service Plan, beginning on 2015-02-23
	Created a tailored Service Plan, beginning on 2015-03-02
	Created a tailored Service Plan, beginning on 2015-03-03

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.

Enrollment Summary


+ Add New

Family

Status

Search

Status	Program   Assigned Case Mgr	Program Entry - Exit Dates	Case Manager Assignment Dates	Elig. Rules Not Met	Program ID	Enrc
Enrolled	Common Intake	4/16/2015 - Present			179	1
Assessments Pending	CEAP   Household Crisis	4/15/2015 - Present			97	1
Exited	Weatherization Assistance	4/13/2015 - 4/14/2015			131	1
Assessments Pending	12 Permanent Housing for Homeless Disabled	4/13/2015 - Present			42	1
Enrolled	CC Refugee Reception & Placement	3/19/2015 - Present			136	1
Enrolled	CC Pregnancy	3/18/2015 - Present			138	1
Enrolled	CC Emergency Services	3/18/2015 - Present			147	1

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












Enrollment Summary

+ Add New

Family

Status

Search

	Program   Assigned Case Mgr	Program Entry - Exit Dates	Case Manager Assignment Dates	Elig. Rules Not Met	Program ID	Enrc
 Edit	Common Intake	4/16/2015 - Present			179	1
 Member	AP   Household Crisis	4/15/2015 - Present			97	1
 Exit Enrollment w/ Reservation	Weatherization Assistance	4/13/2015 - 4/14/2015			131	1
 Transfer to Enrollment	12 Permanent Housing for Homeless Disabled	4/13/2015 - Present			42	1
 Service Plan with Budgets	CC Refugee Reception & Placement	3/19/2015 - Present			136	1
 Schedule Home Service Plan	CC Pregnancy	3/18/2015 - Present			138	1
 Service Authorization CW	Emergency Services	3/18/2015 - Present			147	1
 Service Authorization PC	Adoption	3/18/2015 - Present			139	1
 Question/Answer	IF	3/18/2015 - Present			137	1
 PPI Report	program   Eliason, Adrian	3/9/2015 - Present	3/9/2015 - Present		102	1
 Delete						

The Summary of Enrollment Service Plans with Budgets form displays.

Summary of Enrollment Service Plans with Budgets


+ Add New

The following list represents Client Service Plans that are linked to a specific Enrollment.

Total Rows: 1

Search

	Plan Begin - End Dates	Description	Plan Type	Case Manager	Case Note	% Complete	Plan
	3/31/2015 - 4/2/2015	description	Initial	aeliason		50.00 %	14


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.


The screenshot shows a web application interface. At the top, there is a tab labeled 'Summary of Goal Plans with Budgets'. Below this tab, there is a message: 'The following list represents Client Goals that are linked to a specific Service Plan.' Below the message, there is a table with columns: 'Goal Description', 'Goal Date', 'Goal Target Date', 'Hours Budget', and 'Case Note'. The table contains three rows of data. The first row is 'Full-time job' with 'Goal Date' 3/31/2015 and 'Hours Budget' 5.00. The second row is 'Acquire Stable Housing' with 'Goal Date' 3/3/2015, 'Goal Target Date' 3/12/2015, and 'Hours Budget' 2.50. The third row is 'GED Class' with 'Goal Date' 2/16/2015, 'Goal Target Date' 3/18/2015, and 'Hours Budget' 0.00. At the bottom of the table, there is a 'Total: 7.50'.

Goal Description	Goal Date	Goal Target Date	Hours Budget	Case Note
Full-time job	3/31/2015		5.00	
Acquire Stable Housing	3/3/2015	3/12/2015	2.50	
GED Class	2/16/2015	3/18/2015	0.00	
			Total: 7.50	


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 screenshot shows a web application interface. At the top, there is a tab labeled 'Summary of Goal Plans with Budgets'. Below this tab, there is a message: 'The following list represents Client Goals that are linked to a specific Service Plan.' Below the message, there is a table with columns: 'Goal Description', 'Goal Date', 'Goal Target Date', 'Hours Budget', and 'Case Note'. The table contains three rows of data. The first row is 'Full-time job' with 'Goal Date' 3/31/2015 and 'Hours Budget' 5.00. The second row is 'Acquire Stable Housing' with 'Goal Date' 3/3/2015, 'Goal Target Date' 3/12/2015, and 'Hours Budget' 2.50. The third row is 'GED Class' with 'Goal Date' 2/16/2015, 'Goal Target Date' 3/18/2015, and 'Hours Budget' 0.00. At the bottom of the table, there is a 'Total: 7.50'. A dropdown menu is open over the first row, showing options: 'View Time', 'Service Plan Report', 'Plan Outcomes', 'Service Plan History', 'Delete', and 'Steps W/Budgets'. The 'Steps W/Budgets' option is highlighted with a red rectangle.

Goal Description	Goal Date	Goal Target Date	Hours Budget	Case Note
Full-time job	3/31/2015		5.00	
Acquire Stable Housing	3/3/2015	3/12/2015	2.50	
GED Class	2/16/2015	3/18/2015	0.00	
			Total: 7.50	



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

Client Goal Steps with Budgets							+ Add Row
Step Description	Step Date	Target Date	Frequency *	Status	Funding Source	Hours Budget	
<input checked="" type="checkbox"/> Get Taxes	4/16/2015	4/16/2015	Weekly	Open		2.50	
						Total: 2.50	


The row expands. Click on the  Intervention Notes button.

Client Goal Steps with Budgets							+ Add Row
Step Description	Step Date	Target Date	Frequency *	Status	Funding Source	Hours Budget	
<input checked="" type="checkbox"/> Get Taxes	04/16/2015	04/16/2015	Weekly	Open		2.50	
<div> <div>Service Type *</div> <div>Legal Services</div> </div> <div> <div>Custom Description</div> <div>Get Taxes</div> </div>							
						Total: 2.50	

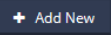
The Intervention Notes form displays.

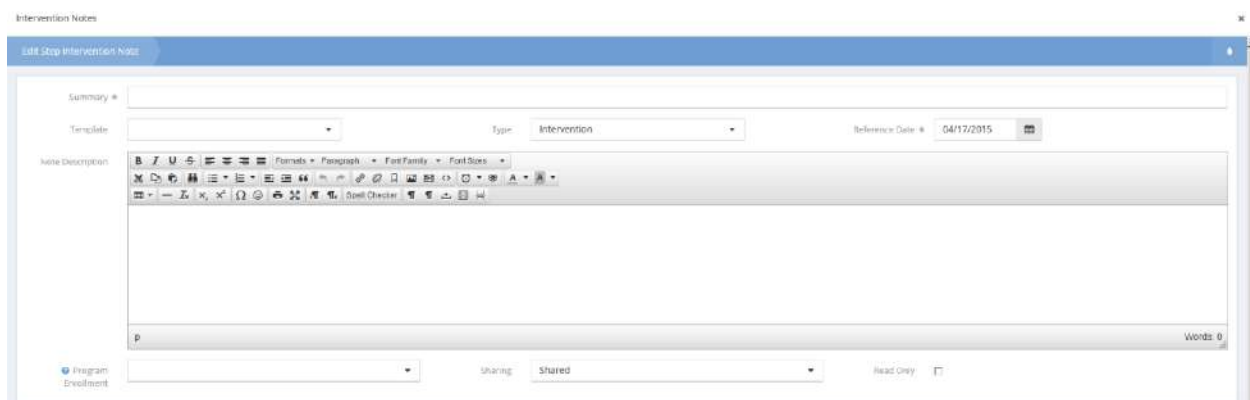
Intervention Notes			
Intervention Notes Summary by Step			
<div>Print Selected</div> <div>Print All</div>			
Total Rows: 1			
Case Note Reference Date	Preview	Step Description	Case Note Summary
4/17/2015	 	Get Taxes	Intervention notes


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 from the pop up menu that appears.



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

A screenshot of the 'Add New Intervention Note' form. The form has a blue header bar with the text 'Add New Intervention Note'. Below the header, there is a 'Summary' section with a text input field. A 'Template' dropdown menu is set to 'Intervention'. A 'Reference Date' field shows '04/17/2015'. The 'Note Description' section features a rich text editor with various formatting tools (bold, italic, underline, link, etc.) and a large text area. At the bottom, there is a 'Program Enrollment' dropdown menu, a 'Sharing' dropdown menu set to 'Shared', and a 'Read Only' checkbox.

When finished, click on the  button.

## Enrollment Denied Reason

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

Enrollment Summary



+ Add New

Family

Status

Search

Status	Program   Assigned Case Mgr	Program Entry - Exit	CM Assign. Dates	Elig. Rules	Family	Program ID	Enroll ID
<div>Ineligible</div>	Employment with Substance Abuse	7/28/2015 - Present		<div><div></div></div>	Cliente.Nuevo-1949-04-01	105	13645
<div>Enrolled</div>	Employment Job Match Program	7/28/2015 - Present			Cliente.Nuevo-1949-04-01	199	13644
<div>Assessments Pending</div>	Isample prog (HIV)	7/9/2015 - Present			Cliente.Nuevo-1949-04-01	151	13641

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.

Elig. Rules

Enrollment Denied Reason

Program

Employment with Substance Abuse

Status

Turned Away/Denied

Eligibility Rules Not Met

HCHAge >= 18

Done

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.

Enrollment Summary + Add New

Family:  Status:

Total Rows: 8 Q Search

	Status	Program   Assigned Case Mgr	Program Entry - Exit	CM Assign. Dates	Elig. Rules	Family	Program ID	Enroll ID
⚙	Edit	Food Pantry El Centro	6/30/2015 - Present			Cliente	44	13680
⚙	Member	Sample prog (HIV)	6/19/2015 - Present			Cliente	151	13644
⚙	Treatment / Service Plan	EAP / Utility Assistance	6/17/2015 - Present			Cliente	98	13637
⚙	Service Plan with Budgets	Family VI SPDAT	6/11/2015 - 6/12/2015			Cliente	197	12589
⚙	Behavioral Health Service Plan	YAGA	2/23/2015 - 5/24/2015			Cliente	95	10171
⚙	Service Authorization CW	Safe Haven	2/23/2015 - Present			Cliente	43	10170
⚙	PPI Report	Permanent Housing for Homeless Disabled	1/29/2015 - Present			Cliente	42	10067
⚙	Delete	Head Start	1/29/2015 - Present			Cliente	58	10066


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.

Enrollment Service Plan Summary + Add New + Add New Workflow

Sample prog (HIV) Q Search

Total Rows: 2

Plan Begin - End Dates	Description	Plan Type	Case Manager	Case Note	% Complete Method	% Complete	Plan ID
6/23/2015 - 11/30/2015	description	Phase1	aedason		Calculate from Steps	49.00 %	1515
6/22/2015 - 9/20/2015	Phase1	Phase1	JaneTJoe		Calculate from Steps	100.00 %	1512


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

Enrollment Service Plan Summary + Add New + Add New Workflow

Sample prog (HIV) Q Search

Total Rows: 2

	Description	Plan Type	Case Manager	Case Note	% Complete Method	% Complete	Plan ID
⚙	description	Phase1	aedason		Calculate from Steps	49.00 %	1515
⚙	Phase1	Phase1	JaneTJoe		Calculate from Steps	100.00 %	1512

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.

Enrollment Summary + Add New

Status  Family

Total Rows: 6 Search

	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

Done

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


The screenshot shows the 'Enrollment Summary' page. A dropdown menu is open on the left side, listing various actions. The 'IEP/IFSP' option is highlighted with a red rectangular box. The background table shows columns for 'Assigned Case Mgr', 'Program Entry - Exit', 'CM Assignment Dates', 'Eligibility Rules', and 'Family'.

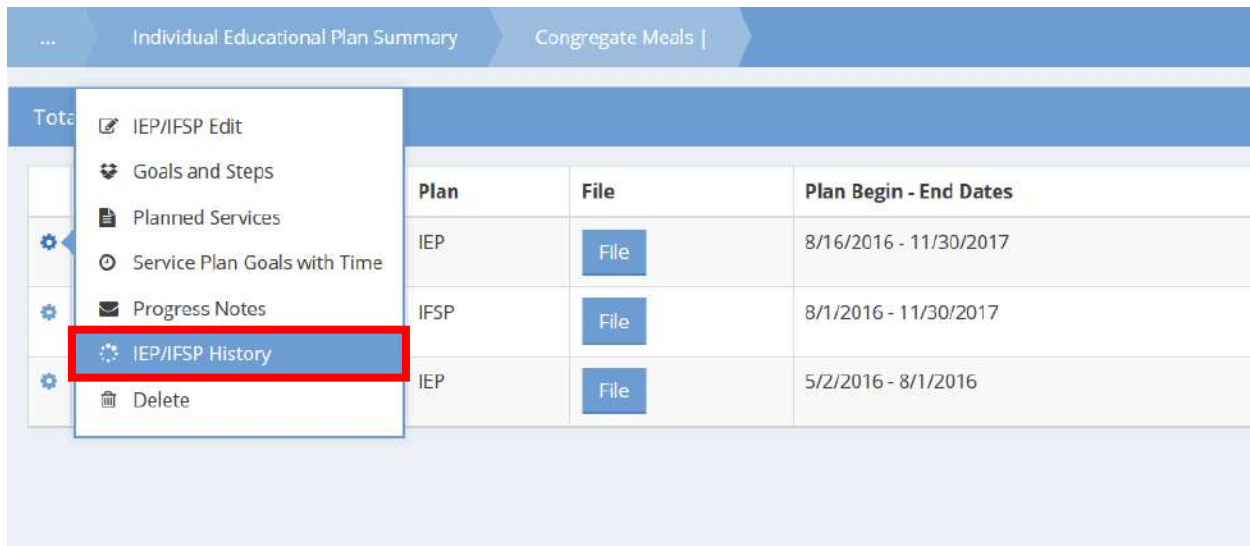
Assigned Case Mgr	Program Entry - Exit	CM Assignment Dates	Eligibility Rules	Family
Meals	8/16/2016 - Open			Writer,Do
e Dining Test	8/16/2016 - Open			Writer,Do
ogram	6/2/2016 - Open			Writer,Do
based Rental Assistance (TRA)	12/13/2015 - Open			Writer,Do
art	5/23/2016 - Open			Writer,Do
ation Program	5/23/2016 - Open			Writer,Do

The Individualized Educational Plan Summary form displays.

The screenshot shows the 'Individual Educational Plan Summary' page. It features a table with two rows. The first row is highlighted with a red rectangular box. The table columns are 'Description', 'Plan', 'File', 'Plan Begin - End Dates', 'Case Note', and 'Plan ID'.

Description	Plan	File	Plan Begin - End Dates	Case Note	Plan ID
IEP Test	IEP	<a href="#">File</a>	8/16/2016 - 11/30/2017		1756
IFSP Test	IFSP	<a href="#">File</a>	8/1/2016 - 11/30/2017		1757

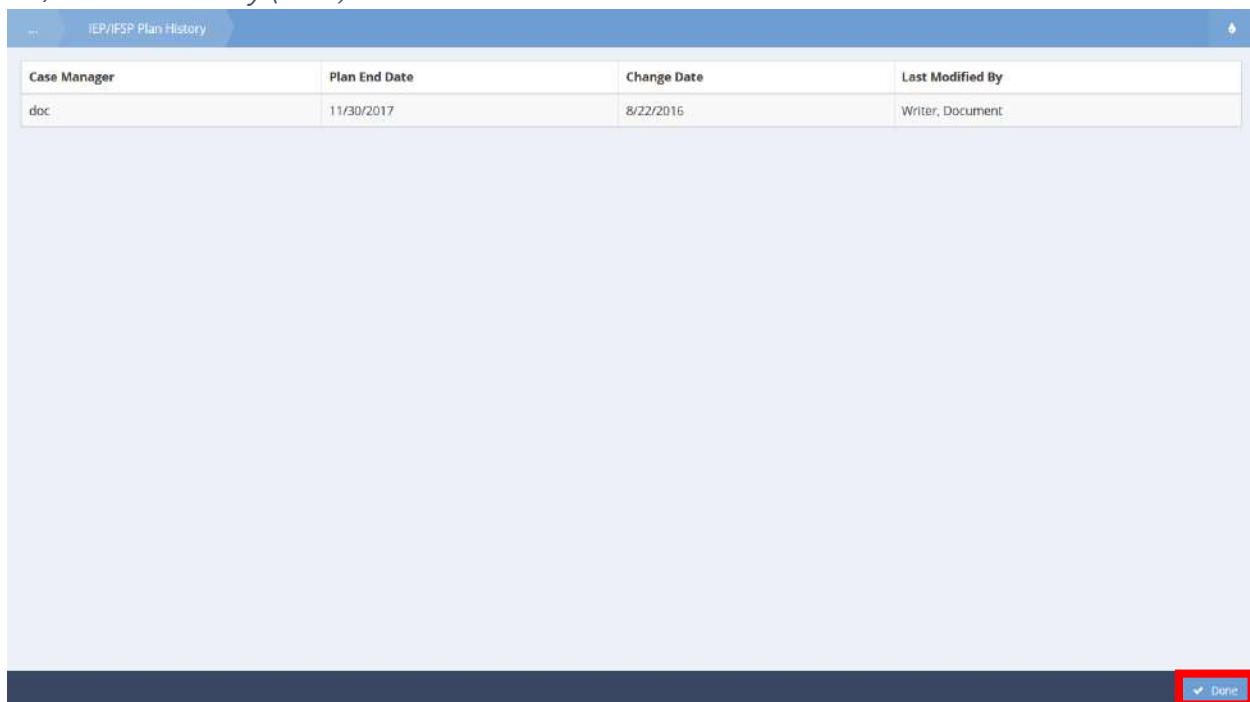
Existing IEPs and IFSPs display. Click the action gear  icon associated with the desired plan and select IEP/IFSP History.



Plan	File	Plan Begin - End Dates
IEP	<a href="#">File</a>	8/16/2016 - 11/30/2017
IFSP	<a href="#">File</a>	8/1/2016 - 11/30/2017
IEP	<a href="#">File</a>	5/2/2016 - 8/1/2016

The IEP/IFSP Plan History form displays.

#### *IEP/IFSP Plan History (8945)*




Case Manager	Plan End Date	Change Date	Last Modified By
doc	11/30/2017	8/22/2016	Writer, Document

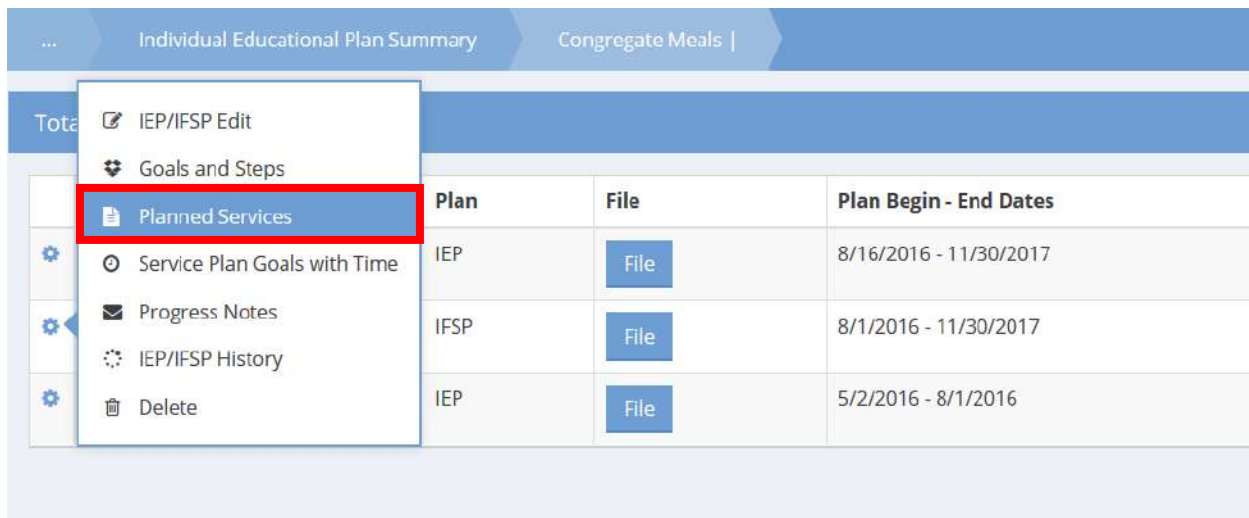
Done

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.

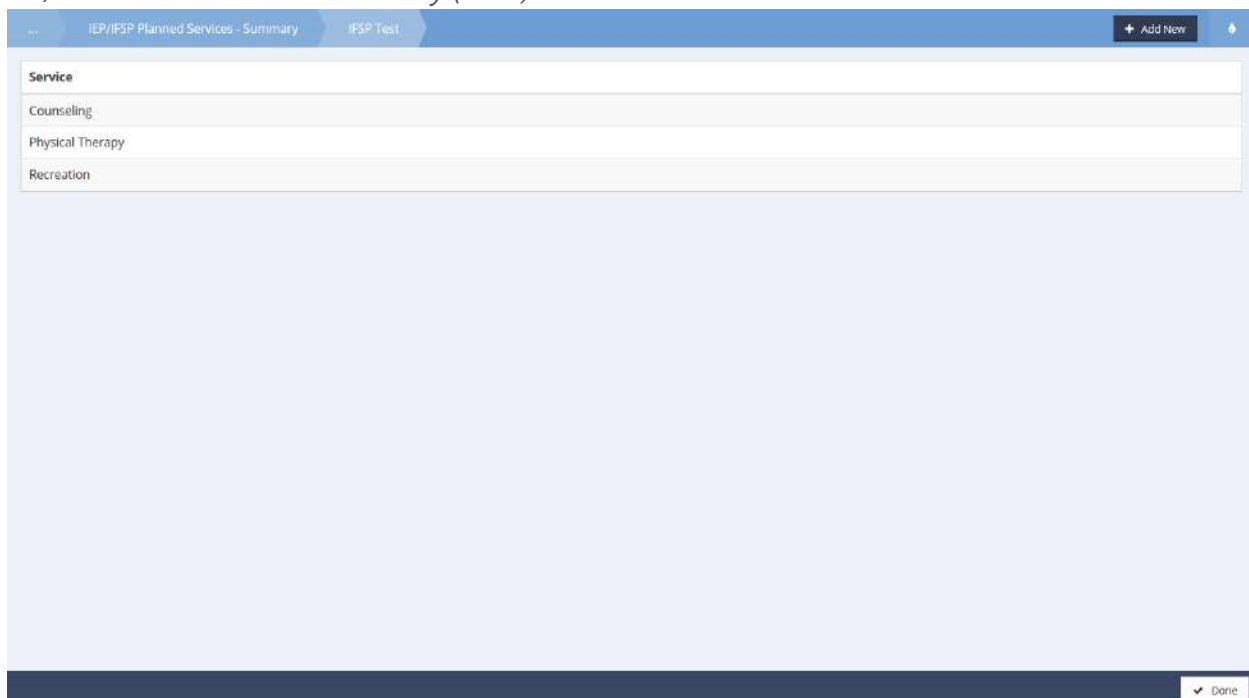


The screenshot shows the 'Individual Educational Plan Summary' page. A dropdown menu is open, listing several options. The 'Planned Services' option is highlighted with a red box. The background table shows three plans: IEP, IFSP, and IEP, each with a 'File' button and 'Plan Begin - End Dates'.

Plan	File	Plan Begin - End Dates
IEP	<a href="#">File</a>	8/16/2016 - 11/30/2017
IFSP	<a href="#">File</a>	8/1/2016 - 11/30/2017
IEP	<a href="#">File</a>	5/2/2016 - 8/1/2016

The IEP/IFSP Planned Services – Summary form displays.

*IEP/IFSP Planned Services Summary (8951)*



The screenshot shows the 'IEP/IFSP Planned Services - Summary' form. It has a header bar with 'IEP/IFSP Planned Services - Summary' and 'IFSP Test' tabs, and an 'Add New' button. The form contains a table with the following data:

Service
Counseling
Physical Therapy
Recreation

A 'Done' button is visible at the bottom right of the form.

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






The IEP/IFSP Service Add form displays.

### *IEP/IFSP Planned Services Add (8950)*



Description	Service Type ID
<input checked="" type="checkbox"/> Recreation	582
<input checked="" type="checkbox"/> Physical Therapy	580
<input checked="" type="checkbox"/> Counseling	306
<input checked="" type="checkbox"/> Audiology Services	573
<input checked="" type="checkbox"/> School Health Services	574
<input checked="" type="checkbox"/> Medical Services	575
<input checked="" type="checkbox"/> Social Work Services in School	576
<input checked="" type="checkbox"/> Occupational Therapy	577
<input checked="" type="checkbox"/> Orientation and Mobility Services	578
<input checked="" type="checkbox"/> Parent Counseling and Training	579
<input checked="" type="checkbox"/> Psychological Services	581
<input checked="" type="checkbox"/> Transportation	98
<input checked="" type="checkbox"/> Rehabilitation Counseling Services	583
<input checked="" type="checkbox"/> Interpreting Services	584
<input checked="" type="checkbox"/> Afternoon Snack	588

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  button to save and exit.

## Program Individual Services Summary

**Objective:** View client services for an enrolled program.

**Navigation:** Case Management>Case Management>Program Enrollment

Enrollment Summary

Add New

Family

Status

Total Rows: 6


Search

Status	Program   Assigned Case Mgr	Program Entry - Exit	CM Assignment Dates	Eligibility Rules	Family	Program ID	Enroll ID
Enrolled	Family VI SPDAT	9/28/2015 - Present			Cliente.Nuevo-1949-01-01	197	15154
Exited	VI SPDAT Program	9/25/2015 - 9/26/2015			Cliente.Nuevo-1949-01-01	196	15150
Exited	testprogram	9/23/2015 - 9/28/2015			Cliente.Nuevo-1949-01-01	230	15140
Assessments Pending	Mental Health Clinic - Security Testing	9/23/2015 - Present			Cliente.Nuevo-1949-01-01	156	15139
Assessments Pending	Medical Program	9/23/2015 - Present			Cliente.Nuevo-1949-01-01	211	15138
Assessments Pending	1 English for Employment	9/22/2015 - Present			Cliente.Nuevo-1949-01-01	94	15134








The Enrollment Summary form displays.

The screenshot shows the Enrollment Summary form with a context menu open. The menu options are:

- Edit
- Member
- Exit Enrollment w/ Reservation
- Treatment / Service Plan
- Service Plan with Budgets
- Behavioral Health Service Plan
- Service Authorization CW
- Question/Answer
- PPI Report
- Exit W Enroll
- Enrollment Details
- View Services** (highlighted)
- View Case Notes
- View Checklist
- Delete

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.

Individual Services Summary									
Total Rows: 80									
	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
	10/8/2015	09 Head Start	Adult Counseling Service	1/4 Hours (15 Min Intervals)	1.00	0.00	0.00	4237	1215584

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





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

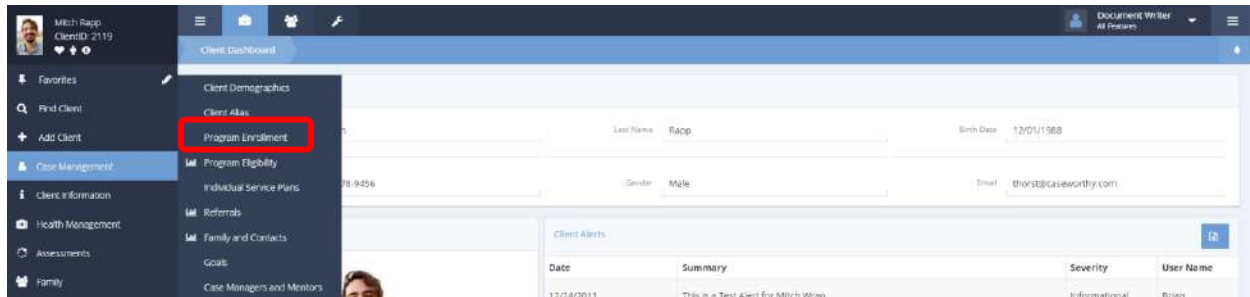
	Preview	Reference Date	Case Note Summary	Type	Status	Created Date
		10/8/2015	test	Service		7/21/2015 1:07:00 PM

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.

Enrollment Summary									
<div> <div>Filters</div> <div> <div>Status</div> <div>Family</div> </div> </div>									
Total Rows: 60									
	Status	Program   Assigned Case Mgr	Program Entry - Exit	CM Assignment Dates	Eligibility Rules	Family	Program ID	Enrollment FamilyID	Enroll ID
	Enrolled	Tyler Test Program	7/26/2017 - Open			Wrapp, Mitch-1988-12-01	378	5631	23967
	Assessments Pending	VI SPDAT Eligibility Test	7/26/2017 - Open			Wrapp, Mitch-1988-12-01	410	5631	23966
	Enrolled	Work Therapy Program	6/14/2017 - Open			Wrapp, Mitch-1988-12-01	394	5631	23893
	Enrolled	Child Day Care	5/5/2017 - Open			Wrapp, Mitch-1988-12-01	144	5631	23813
	Exited	I1testprogram	4/18/2017 - 4/19/2017			Wrapp, Mitch-1988-12-01	323	5631	23772
	Enrolled	22 Sponsored Rental Asst (SRA) NA	2/1/2017 - Open			Wrapp, Mitch-1988-12-01	48	5631	23568
	Exited	I1testprogram	2/20/2017 - 2/21/2017			Wrapp, Mitch-1988-12-01	323	5631	21557
	Enrolled	FinancialHMIS	2/3/2017 - Open			Wrapp, Mitch-1988-12-01	346	5631	19483
	Exited	I1testprogram	1/27/2017 - 2/15/2017			Wrapp, Mitch-1988-12-01	323	5631	19439
	Enrolled	Medical Program	1/16/2017 - Open			Wrapp, Mitch-1988-12-01	211	5631	19373
	Exited	Test: ESG RR Component 10, PF 15	1/5/2017 - 4/5/2017			Wrapp, Mitch-1988-12-01	259	5631	19305

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

A pop-up menu appears.


The screenshot shows the 'Enrollment Summary' page. A table lists enrollment details for various members. A context menu is open, showing options like 'Edit', 'Member', 'Exit Enrollment w/ Reservation', 'Treatment / Service Plan', 'Service Plan with Budgets', 'IDP/FSP', 'Behavioral Health Service Plan', 'Service Area of Interest', 'Service Authorization', 'Service Authorization W/Out Account', 'Question/Answer', 'PPI Report', 'View Services', 'View Case Notes', 'View Checklist', 'Class Reservation' (highlighted in red), and 'Delete'.

Case Mgr	Program Entry - Exit	CM Assignment Dates	Eligibility Rules	Family	Program ID	Enrollment FamilyID	Enroll ID
	7/26/2017 - Open			Wrapp.Mitch-1988-12-01	378	5631	23967
	7/26/2017 - Open			Wrapp.Mitch-1988-12-01	410	5631	23966
	6/14/2017 - Open			Wrapp.Mitch-1988-12-01	394	5631	23893
	5/5/2017 - Open			Wrapp.Mitch-1988-12-01	144	5631	23813
	4/18/2017 - 4/19/2017			Wrapp.Mitch-1988-12-01	323	5631	23772
	2/1/2017 - Open			Wrapp.Mitch-1988-12-01	48	5631	23568
	2/20/2017 - 2/21/2017			Wrapp.Mitch-1988-12-01	323	5631	21557
	2/3/2017 - Open			Wrapp.Mitch-1988-12-01	346	5631	19483
	1/27/2017 - 2/15/2017			Wrapp.Mitch-1988-12-01	323	5631	19439



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

The screenshot shows the 'In/Out Event Summary' page. A table lists events with columns: Member ID, Name, Member Enrollment ID, Usage Name, Start Date, and End Date. The 'Edit' button for the second row is highlighted.

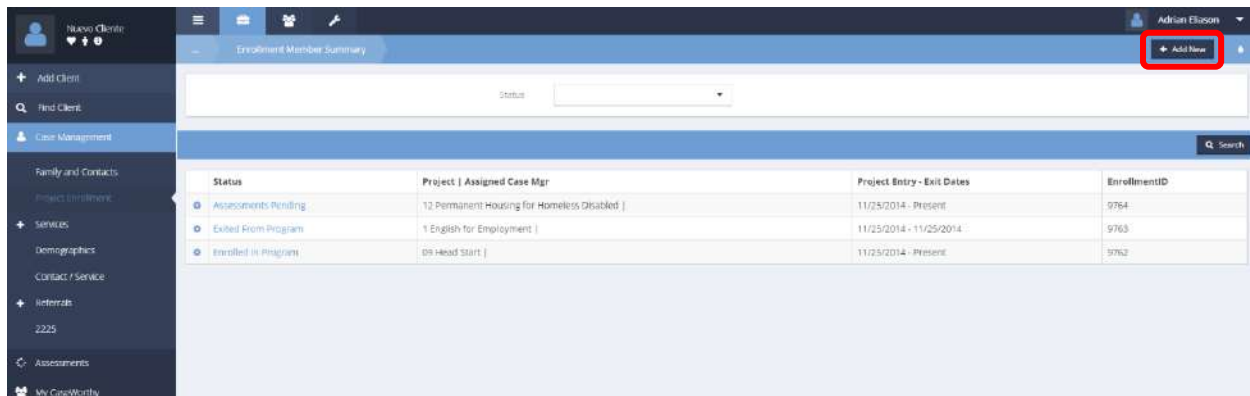
Member ID	Name	Member Enrollment ID	Usage Name	Start Date	End Date
25961	Rapp, Mitch	23893	Breakfast - Cook	9/15/2017	9/15/2017
25961	Rapp, Mitch	23893	Dinner - Cook	7/5/2017	7/5/2017
25961	Rapp, Mitch	23893	Lunch - Cook	8/13/2017	8/13/2017
25961	Rapp, Mitch	23893	Lunch - Waiter	8/11/2017	8/11/2017

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

The screenshot shows the 'Edit Class' form. It contains fields for 'Begin Date' (07/05/2017), 'End Date' (07/05/2017), and 'Class' (Dinner - Cook). There are calendar icons next to the date fields.

Click on the  icons to adjust the Begin and End dates for the class. Click the  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.


The screenshot shows the 'Add/Edit Enrollment' form. The 'Family Name' field is pre-filled with 'Draper Sally-1962-02-05'. A red box highlights the 'Project Entry Date' (07/08/2015), 'Project Exit Date' (Open), 'Project' (a dropdown menu), and 'Provider' (CaseWorthy) fields. Below these are checkboxes for 'Enroll current client' and 'Assign Case Manager', and a 'Schedule Follow Up' button. At the bottom, there is a 'Restriction Information' section with a 'Restriction' dropdown set to 'Shared'.

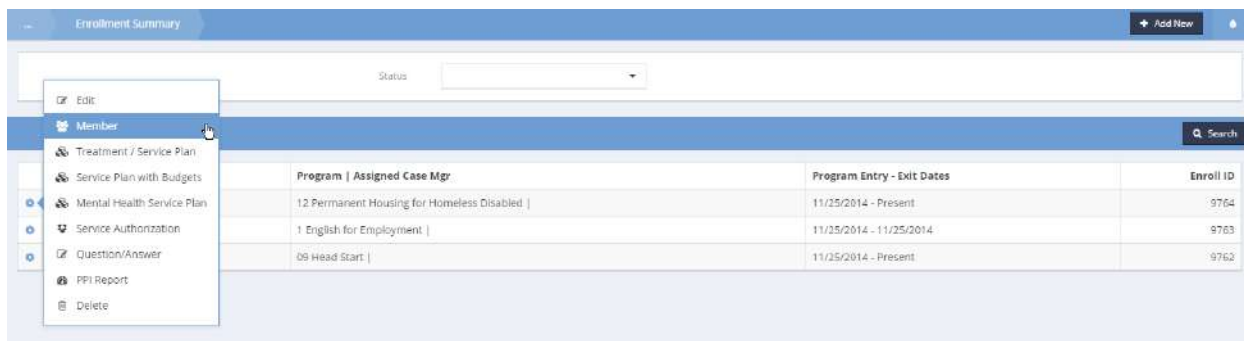
Enter an entry and exit date and select a provider. Select a project from the drop-down list.

This close-up shows the 'Project' dropdown menu with '!sample prog (HIV)' selected. Below it is an empty 'Account' dropdown menu. At the bottom, the 'Enroll current client' checkbox is checked.

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.

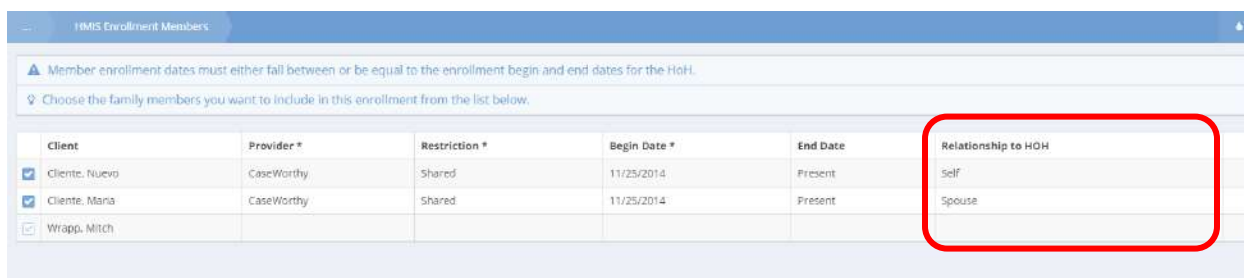
To edit an existing enrollment, click on the action gear  icon associated with the desired enrollment and select Member from the popup menu that appears.





The HMIS Enrollment Members for Case Management form displays.




Click on the  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.





The Enrollment Service Plan Mental Health Summary form displays.

Enrollment Service Plan Mental Health Summary						
The following list represents Client Service Plans that are linked to a specific Enrollment.						
Total Rows: 1						
Plan Begin - End Dates	Description	Plan Type	Case Manager	% Complete	Service Plan Notes	Plan
3/31/2015 - 4/2/2015	description	Initial	aellason	50.00 %		14

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

Enrollment Service Plan Mental Health Summary						
The following list represents Client Service Plans that are linked to a specific Enrollment.						
Total Rows: 1						
Plan Begin - End Dates	Description	Plan Type	Case Manager	% Complete	Service Plan Notes	Plan
3/31/2015 - 4/2/2015	description	Initial	aellason	50.00 %		14

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

Summary of Goal Plans with Budget and Time						
The following list represents Client Goals that are linked to a specific Service Plan.						
Total Rows: 3						
Goal Date	Goal Description	Goal Target Date	Hours Budget	Hours Used	Progress Notes	Steps
3/31/2015	Full-time Job		5.00	0.00		
3/3/2015	Acquire Stable Housing	3/12/2015	2.50	0.00		
2/16/2015	GED Class	3/18/2015	0.00	0.00		
			Total: 7.50	Total: 0.00		

## 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.

The screenshot shows the 'Add New' form for an Enrollment Service Plan. The form is titled 'Service Plan' and contains several sections:

- Enrollment Service Plan Dates:** Includes fields for 'Begin Date' (04/15/2015), 'Plan End Date', and 'Actual Completed Date'.
- Plan Information:** Includes fields for 'Case Manager' (arlington), 'Plan Type' (Initial), 'Plan Description', and 'Percent Complete' (0).
- Signature:** Includes an 'Add Signature' button.
- Select the issues that are being addressed through this Enrollment Service Plan:** Includes a list of issues.
- Add Follow-Up:** Includes a checkbox.
- Buttons:** 'Save' and 'Cancel' buttons at the bottom right.

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.

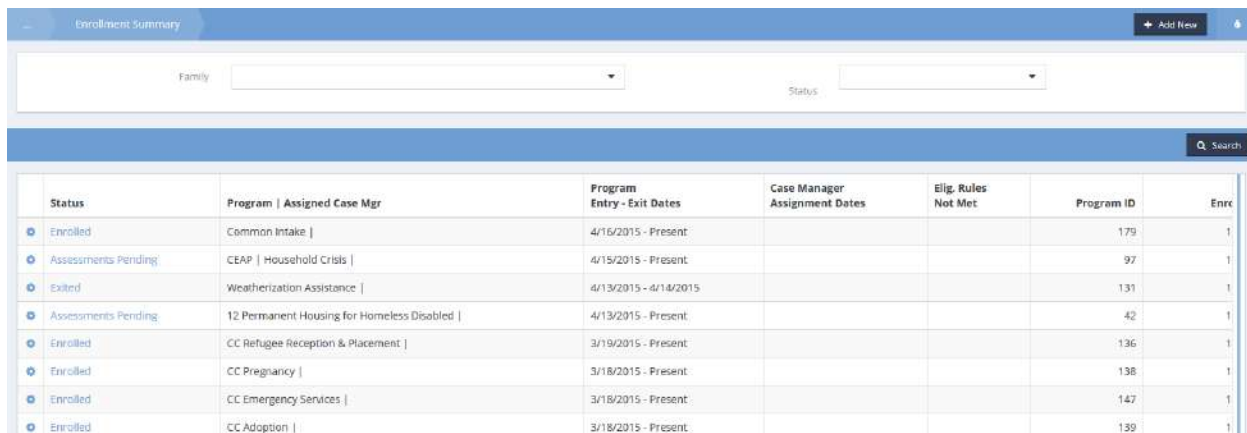
The screenshot shows the 'Schedule Follow Up' form. The form is titled 'Schedule Follow Up' and contains the following fields:

- Client:** Dorell, Steven
- Follow Up Type:** Schedule Follow Up
- Follow Up Days:** 30
- Target Follow Up Date:** 05/16/2015
- Follow Up Status:** Open
- Assigned Team:** Team Member
- Team Member:**
- Buttons:** 'Update' and 'Save' buttons at the bottom right.

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


## Goal Progress Note and Service Plan Note

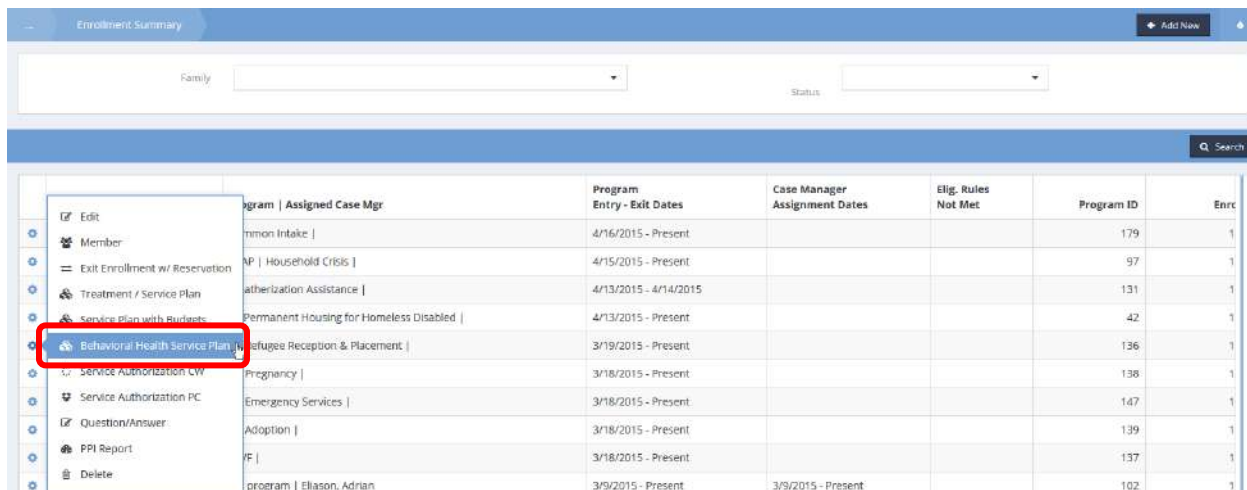
**Objective:** Enter and edit notes relating to service plans and progress.



The screenshot shows the 'Enrollment Summary' page with a table of program enrollments. The table has columns for Status, Program | Assigned Case Mgr, Program Entry - Exit Dates, Case Manager Assignment Dates, Elig. Rules Not Met, Program ID, and Enroll. The following table represents the data shown:

Status	Program   Assigned Case Mgr	Program Entry - Exit Dates	Case Manager Assignment Dates	Elig. Rules Not Met	Program ID	Enroll
Enrolled	Common Intake	4/15/2015 - Present			179	1
Assessments Pending	CEAP   Household Crisis	4/15/2015 - Present			97	1
Exited	Weatherization Assistance	4/13/2015 - 4/14/2015			131	1
Assessments Pending	12 Permanent Housing for Homeless Disabled	4/13/2015 - Present			42	1
Enrolled	CC Refugee Reception & Placement	3/19/2015 - Present			136	1
Enrolled	CC Pregnancy	3/18/2015 - Present			138	1
Enrolled	CC Emergency Services	3/18/2015 - Present			147	1
Enrolled	CC Adoption	3/18/2015 - Present			139	1

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 screenshot shows the 'Enrollment Summary' page with the same table as above. The action menu for the first row is open, and the 'Behavioral Health Service Plan' option is highlighted with a red box. The following table represents the data shown:

Status	Program   Assigned Case Mgr	Program Entry - Exit Dates	Case Manager Assignment Dates	Elig. Rules Not Met	Program ID	Enroll
Enrolled	Common Intake	4/15/2015 - Present			179	1
Assessments Pending	CEAP   Household Crisis	4/15/2015 - Present			97	1
Exited	Weatherization Assistance	4/13/2015 - 4/14/2015			131	1
Assessments Pending	12 Permanent Housing for Homeless Disabled	4/13/2015 - Present			42	1
Enrolled	CC Refugee Reception & Placement	3/19/2015 - Present			136	1
Enrolled	CC Pregnancy	3/18/2015 - Present			138	1
Enrolled	CC Emergency Services	3/18/2015 - Present			147	1
Enrolled	CC Adoption	3/18/2015 - Present			139	1
Enrolled	CC Adoption	3/18/2015 - Present			137	1
Enrolled	program   Elason, Adrian	3/9/2015 - Present	3/9/2015 - Present		102	1

The Enrollment Service Plan Mental Health Summary form displays.

Enrollment Service Plan Mental Health Summary							+ Add New	+ Add New Workflow	
The following list represents Client Service Plans that are linked to a specific Enrollment.									
Total Rows: 1									
Plan Begin - End Dates	Description	Plan Type	Case Manager	% Complete	Service Plan Notes			Plan	
3/31/2015 - 4/2/2015	description	Initial	aeilason	50.00 %				14	

### 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.

Service Plan Case Notes Summary

Print Selected

Print All

Total Rows: 2

	Preview	Service Plan	Case Note Summary	Case Note Reference Date
<div><div></div><div></div></div>	<div><div></div><div></div></div>	description	note 1	4/16/2015
<div><div></div><div></div></div>	<div><div></div><div></div></div>	description	note 2	4/16/2015

Click on the  button. The Edit Service Plan Note form displays.

Service Plan Note

Summary \*

Template

TypeService Plan

Reference Date \*04/16/2015

Note Description


B I U

pWords: 0


Program Enrollment

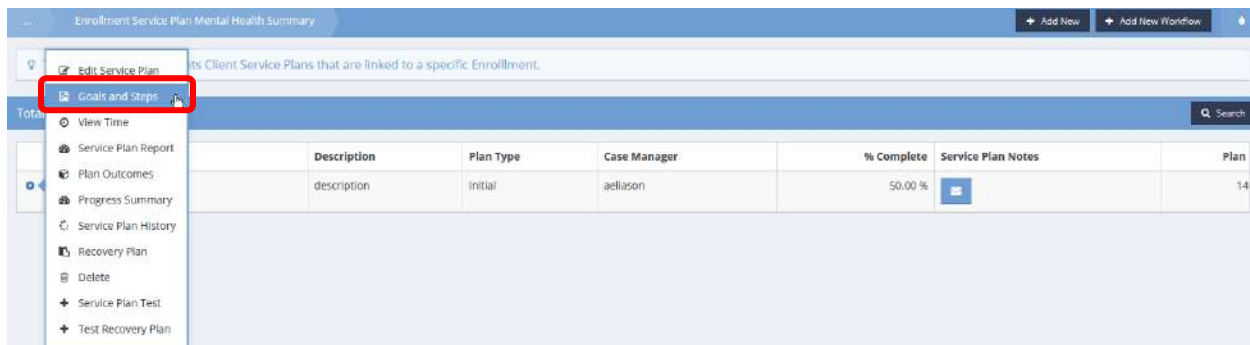
SharingShared

Read Only

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.

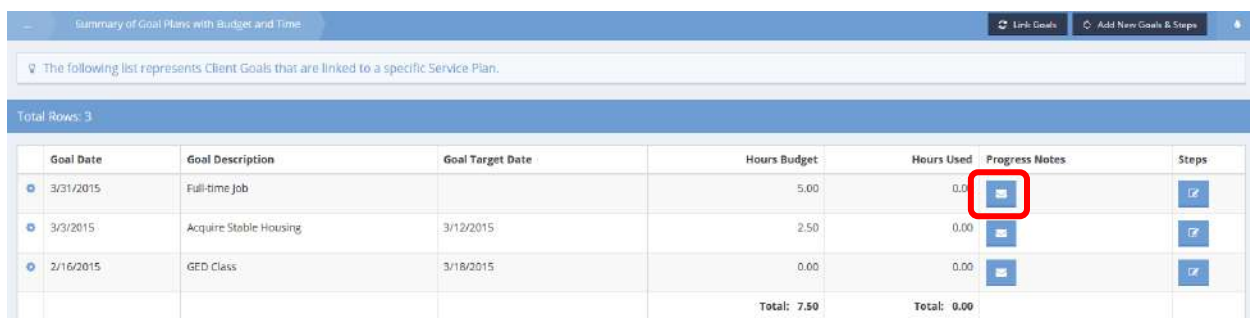
## Goal Progress Note

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 screenshot shows the 'Enrollment Services Plan Mental Health Summary' form. A dropdown menu is open, showing various actions. The 'Goals and Steps' option is highlighted with a red box. The menu also includes options like 'Edit Service Plan', 'View Time', 'Service Plan Report', 'Plan Outcomes', 'Progress Summary', 'Service Plan History', 'Recovery Plan', 'Delete', 'Service Plan Test', and 'Test Recovery Plan'.

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



The screenshot shows the 'Summary of Goal Plans with Budget and Time' form. It displays a table with 3 rows of goal data. The first row is highlighted, and the progress notes icon (an envelope) in the 'Progress Notes' column is highlighted with a red box.

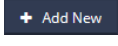
Goal Date	Goal Description	Goal Target Date	Hours Budget	Hours Used	Progress Notes	Steps
3/31/2015	Full-time Job		5.00	0.00		
3/3/2015	Acquire Stable Housing	3/12/2015	2.50	0.00		
2/16/2015	GED Class	3/18/2015	0.00	0.00		
Total:			7.50	0.00		

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




The screenshot shows the 'Progress Notes Summary by Goal' form. It displays a table with 1 row of progress note data. The 'Add New' button in the top right corner is highlighted with a red box.

Preview	Goal Description	Goal Target Date	Case Note Summary	Case Note Reference Date
	Full-time job		made minimal progress	4/16/2015

Click on the  button.

The Add New form displays.

The screenshot shows the 'Add New' form for creating a 'Goal Progress Note'. The form has a blue header bar with the title 'Add New' and a sub-header 'Edit Goal Progress Note'. Below the header, there are several input fields and a rich text editor. The 'Summary' field is a text box. The 'Template' field is a dropdown menu. The 'Reference Date' field is a date picker showing '04/16/2015'. The 'Note Description' field is a rich text editor with a toolbar containing various formatting options like bold, italic, underline, and link. Below the rich text editor, there is a 'Sharing' dropdown menu set to 'Shared', a 'Read Only' checkbox, and a 'Program Enrollment' dropdown menu. A 'Save' button is located at the bottom right of the form.

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.

Enrollment Summary


Add New

Family

Status

Q Search

Status	Program   Assigned Case Mgr	Program Entry - Exit Dates	Case Manager Assignment Dates	Elig. Rules Not Met	Program ID	Enroll ID
Assessments Pending	Weatherization Assistance	4/13/2015 - 4/30/2015			131	10311
Assessments Pending	12 Permanent Housing for Homeless Disabled	4/13/2015 - Present			42	10310
Enrolled	CC Refugee Reception & Placement	3/19/2015 - Present			136	10236
Enrolled	CC Pregnancy	3/18/2015 - Present			138	10235
Enrolled	CC Emergency Services	3/18/2015 - Present			147	10234
Enrolled	CC Adoption	3/18/2015 - Present			139	10233
Enrolled	SSVF	3/18/2015 - Present			137	10231
Enrolled	HH program   Eliason, Adrian	3/9/2015 - Present	3/9/2015 - Present		102	10213
Exited	1 English for Employment   Eliason, Adrian	3/9/2015 - 3/10/2015	3/9/2015 - Present		94	10212
Enrolled	Catholic Charities: All in One   Eliason, Adrian	3/9/2015 - Present	3/9/2015 - Present		132	10211
Assessments Pending	Budgets Program   Eliason, Adrian	3/9/2015 - Present	3/9/2015 - Present		178	10210
Enrolled	2 YAGA   Eliason, Adrian	3/9/2015 - Present	3/9/2015 - Present		95	10209

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

Enrollment Summary

Add New

Family

Status

Q Search

Edit

Member

Exit Enrollment w/ Reservation

Treatment / Service Plan

Service Plan with Budgets

Behavioral Health Service Plan

Service Authorization CW

Service Authorization PC

Question/Answer

PPI Report


Delete

	Program   Assigned Case Mgr	Program Entry - Exit Dates	Case Manager Assignment Dates	Elig. Rules Not Met	Program ID	Enroll ID
0	Weatherization Assistance	4/13/2015 - 4/30/2015			131	10311
0	12 Permanent Housing for Homeless Disabled	4/13/2015 - Present			42	10310
0	CC Refugee Reception & Placement	3/19/2015 - Present			136	10236
0	CC Pregnancy	3/18/2015 - Present			138	10235
0	CC Emergency Services	3/18/2015 - Present			147	10234
0	CC Adoption	3/18/2015 - Present			139	10233
0	SSVF	3/18/2015 - Present			137	10231
0	HH program   Eliason, Adrian	3/9/2015 - Present	3/9/2015 - Present		102	10213
0	Exited 1 English for Employment   Eliason, Adrian	3/9/2015 - 3/10/2015	3/9/2015 - Present		94	10212



The Summary of Enrollment Service Plans with Budgets form displays.

Summary of Enrollment Service Plans with Budgets						
The following list represents Client Service Plans that are linked to a specific Enrollment.						
Total Rows: 1						
Plan Begin - End Dates	Description	Plan Type	Case Manager	Case Note	% Complete	Plan ID
3/31/2015 - 4/2/2015	description		aellason		0.00 %	1403

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


Summary of Enrollment Service Plans with Budgets						
The following list represents Client Service Plans that are linked to a specific Enrollment.						
Total Rows: 1						
<div> <div> Edit (Budgets)  Service Plan Goals (Budgets)  <b>View Time</b>  Service Plan Report  Plan Outcomes  Service Plan History  Delete  Test - Service Plan Report </div> </div>	Description	Plan Type	Case Manager	Case Note	% Complete	Plan ID
	description		aellason		0.00 %	1403

The Client Service Plan Time form displays.

Client Service Plan Time					
Total Rows: 57					
Date	Hrs Qty	User	Activity Type	Goal Description	Step Description
3/31/2015	0.00	Richard	Direct - Face to Face	Get Sober	
3/31/2015	0.00	Brian	Direct - Face to Face	GED Class	
3/25/2015	1.00	kallen	Direct - Face to Face	Ability to follow rules and instructions.	
3/25/2015	1.00	kallen	Direct - Face to Face	Ability to follow rules and instructions.	
3/11/2015	0.75	kallen	Direct - Face to Face	\$50 savings	


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.

Client Service Plan Time						
Total Rows: 57						
Date	Hrs Qty	User	Activity Type	Goal Description	Step Description	
3/31/2015	0.00	Richard	Direct - Face to Face	Get Sober		
3/31/2015	0.00	Brian	Direct - Face to Face	GED Class		
3/25/2015	1.00	kallen	Direct - Face to Face	Ability to follow rules and instructions.		
3/25/2015	1.00	kallen	Direct - Face to Face	Ability to follow rules and instructions.		

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

Edit User Client Time with Budgets	
Date	<input type="text"/>
Client Name	<input type="text"/>
Hours / Quantity	<input type="text" value="0.00"/>
Time Type	<input type="text"/>
Service	<input type="text"/>
Activity Information	
Activity Type	<input type="text"/>
Activity Location	<input type="text"/>
Goals and Goal Steps	
Goal	<input type="text"/>
Goal Step	<input type="text"/>
Case Note	<input type="button" value="Case Note"/>



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


Summary of Enrollment Service Plans with Budgets							+ Add New
The following list represents Client Service Plans that are linked to a specific Enrollment.							
Total Rows: 1							Search
Plan Begin - End Dates	Description	Plan Type	Case Manager	Case Note	% Complete	Plan ID	
4/9/2015 - 4/23/2015	description		aellason		0.00 %	1415	





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



Summary of Enrollment Service Plans with Budgets							+ Add New
The following list represents Client Service Plans that are linked to a specific Enrollment.							
Total Rows: 1							Search
Plan Begin - End Dates	Description	Plan Type	Case Manager	Case Note	% Complete	Plan ID	
4/9/2015 - 4/23/2015	description		aellason		0.00 %	1415	

The Goal Plan with Budget (Summary) form displays.

Summary of Goal Plans with Budgets					+ Link Goals
The following list represents Client Goals that are linked to a specific Service Plan.					
Total Rows: 3					
Goal Description	Goal Date	Goal Target Date	Hours Budget	Case Note	
Full-time Job	3/31/2015		0.00		
Acquire Stable Housing	3/3/2015	3/12/2015	0.00		
GED Class	2/16/2015	3/18/2015	0.00		
			Total: 0.00		

Click on the  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	
<input type="checkbox"/>	GED Class	2/16/2015	Both, Client and Staff	3/18/2015	
<input type="checkbox"/>	GED Class	2/16/2015	Both, Client and Staff	3/18/2015	
<input checked="" type="checkbox"/>	GED Class	02/16/2015 	Both, Client and Staff 	03/18/2015 	
<input type="checkbox"/>	GED Class	2/16/2015	Both, Client and Staff	3/18/2015	
<input checked="" type="checkbox"/>	GED Class	2/16/2015	Both, Client and Staff	3/18/2015	
<input type="checkbox"/>	Full-time Job	3/31/2015			
<input type="checkbox"/>	Full-time Job	3/31/2015			
<input checked="" type="checkbox"/>	Full-time Job	3/31/2015			
<input type="checkbox"/>	Part-time Job Desc	3/31/2015			

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

## Client Goal Steps w/budgets (2)

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


Enrollment Summary

Add New

Status:

Search

Status	Program   Assigned Case Mgr	Program Entry - Exit Dates	Case Manager Assignment Dates	Elig. Rules Not Met	Program ID	Enroll ID
<div>Enrolled</div>	CC Refugee Reception & Placement	3/19/2015 - Present			136	10236
<div>Enrolled</div>	CC Pregnancy	3/18/2015 - Present			138	10235
<div>Enrolled</div>	CC Emergency Services	3/18/2015 - Present			147	10234
<div>Enrolled</div>	CC Adoption	3/18/2015 - Present			139	10233
<div>Enrolled</div>	SSVF	3/18/2015 - Present			137	10231
<div>Enrolled</div>	HH program   Eliason, Adrian	3/9/2015 - Present	3/9/2015 - Present		102	10213

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

Enrollment Summary

Add New


Status

Search

Status	Program   Assigned Case Mgr	Program Entry - Exit Dates	Case Manager Assignment Dates	Elig. Rules Not Met	Program ID	Enroll ID
<div><div><div>Edit</div><div>Member</div><div>Exit Enrollment w/ Reservation</div><div>Treatment / Service Plan</div><div>Service Plan with Budgets</div><div>Behavioral Health Service Plan</div><div>Service Authorization PC</div><div>Question/Answer</div><div>PPI Report</div><div>Service Authorization CW</div><div>Delete</div></div></div>	Refugee Reception & Placement	3/19/2015 - Present			136	10236
	Pregnancy	3/18/2015 - Present			138	10235
	Emergency Services	3/18/2015 - Present			147	10234
	Adoption	3/18/2015 - Present			139	10233
	SSVF	3/18/2015 - Present			137	10231
	Behavioral Health Service Plan   Eliason, Adrian	3/9/2015 - Present	3/9/2015 - Present		102	10213
	Job for Employment   Eliason, Adrian	3/9/2015 - 3/10/2015	3/9/2015 - Present		94	10212
	Charities: All in One   Eliason, Adrian	3/9/2015 - Present	3/9/2015 - Present		132	10211
	Program   Eliason, Adrian	3/9/2015 - Present	3/9/2015 - Present		178	10210
	Program   Eliason, Adrian	3/9/2015 - Present	3/9/2015 - Present		95	10209
	Plus Care	3/6/2015 - Present			63	10206

The Enrollment Service Plan with Budgets form displays.


Summary of Enrollment Service Plans with Budgets							+ Add New
The following list represents Client Service Plans that are linked to a specific Enrollment.							
Total Rows: 1							Search
Plan Begin - End Dates	Description	Plan Type	Case Manager	Case Note	% Complete	Plan ID	
3/31/2015 - 5/1/2015	description		aellason		0.00 %	1406	

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

Summary of Enrollment Service Plans with Budgets							+ Add New
The following list represents Client Service Plans that are linked to a specific Enrollment.							
Total Rows: 1							Search
Plan Begin - End Dates	Description	Plan Type	Case Manager	Case Note	% Complete	Plan ID	
3/31/2015 - 5/1/2015	description		aellason		0.00 %	1406	

The Summary of Goal Plans with Budgets form displays.





Summary of Goal Plans with Budgets					+ Link Goals
The following list represents Client Goals that are linked to a specific Service Plan.					
Total Rows: 3					
Goal Description	Goal Date	Goal Target Date	Hours Budget	Case Note	
Full-time Job	3/31/2015		0.00		
Acquire Stable Housing	3/3/2015	3/12/2015	0.00		
GED Class	2/16/2015	3/18/2015	0.00		
			Total: 0.00		

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

Summary of Goal Plans with Budgets Link Goals

The following list represents Client Goals that are linked to a specific Service Plan.

Total Rows: 3

	Goal Date	Goal Target Date	Hours Budget	Case Note
 Edit	3/31/2015		0.00	
 Steps W/Budgets	3/3/2015	3/12/2015	0.00	
 Outcomes	2/16/2015	3/18/2015	0.00	
 Delete				
			Total: 0.00	


The Client Goal Steps with Budgets form displays.

Client Goal Steps with Budgets + Add Row

	Step Description	Step Date	Target Date	Frequency *	Status	Funding Source	Hours Budget
<input checked="" type="checkbox"/>	Write resume	4/15/2015	4/15/2015	Weekly	Open		0.00
							Total: 0.00

To add a new step, click on the + Add Row 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 Save button.

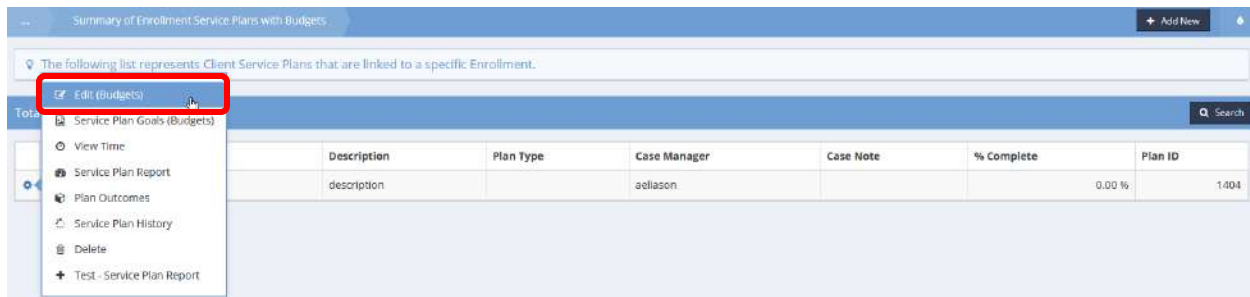
Client Goal Steps with Budgets + Add Row

	Step Description	Step Date	Target Date	Frequency *	Status	Funding Source	Hours Budget
<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/> 04/15/2015 	<input type="text"/>	<input type="text"/> Weekly	<input type="text"/> Open	<input type="text"/>	<input type="text"/> 0.00
	Service Type <input type="text"/> Custom Description <input type="text"/>						
<input checked="" type="checkbox"/>	Write resume	4/15/2015	4/15/2015	Weekly	Open		0.00
							Total: 0.00

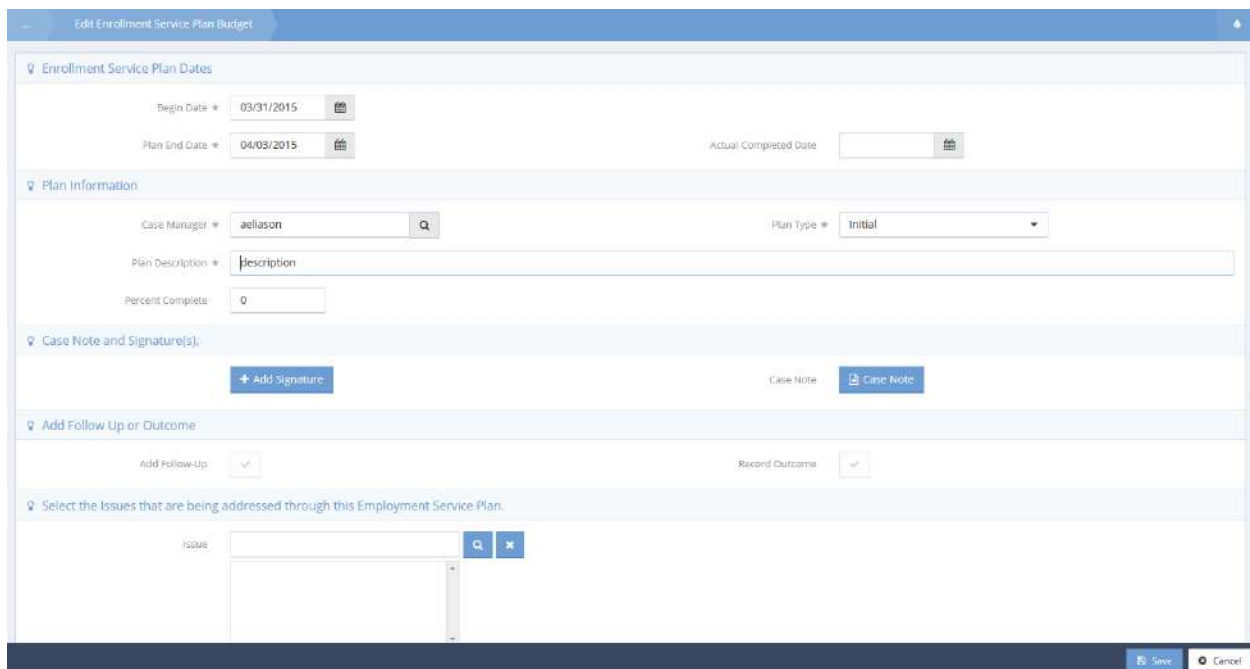


## Edit Enrollment Service Plan Budget

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.



The screenshot shows the "Edit Enrollment Service Plan Budget" form. It includes sections for:

- Enrollment Service Plan Dates:** Begin Date (03/31/2015), Plan End Date (04/03/2015), and Actual Completed Date.
- Plan Information:** Case Manager (aellason), Plan Type (Initial), Plan Description (description), and Percent Complete (0).
- Case Note and Signature(s):** Includes buttons for "Add Signature" and "Case Note".
- Add Follow Up or Outcome:** Includes dropdowns for "Add Follow-Up" and "Record Outcome".
- Select the Issues that are being addressed through this Employment Service Plan:** Includes a search bar and a list of issues.

At the bottom right, there are "Save" and "Cancel" buttons.

Make any changes desired and click on the  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

Client	Provider	Begin - End Dates	Authorization Date	Authorization Reference	Restriction
Bosell, Steve					Shared

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

Client	Provider	Begin - End Dates	Authorization Date	Authorization Reference	Restriction
Bosell, Steve					Shared

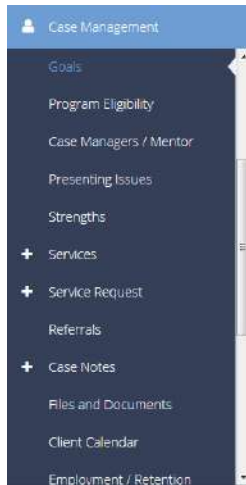
The report displays in a new window.

First Name	Last Name	Middle Name	Suffix
Steve	Bosell		
Ethnicity	Race	Gender	Birth Date
Non-Hispanic or Latino	White	Male	1/22/1969
Veteran Status			

## 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:


Add New Spreadsheet

Category:

Total Rows: 52





Goal Date	Description	Responsible Party	Case Note	Assigned Staff	Restriction *
	\$50 savings				
	Ability to follow rules and instructions.				
	Ability to give and take in situations. (Sharing)				
01/26/2015	Acquire GED	Both, Client and Staff	<a href="#">Case Note</a>		Shared

Target Date:  % Comp:

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.



Goals

Total Rows: 5

- ☒ Edit
- ☒ Edit Goals and Steps
-  Steps
-  Outcomes
-  Goal History
-  Delete

Total Rows: 5

Step Order	Step Description
<input checked="" type="checkbox"/> 1	Open Checking Account
<input checked="" type="checkbox"/> 2	Open Savings Account
<input checked="" type="checkbox"/> 4	30 days clean
<input checked="" type="checkbox"/> 4	Other1
<input checked="" type="checkbox"/> 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:

Add New Goals / Steps

Goal \* Acquire GED

Goal Date \* 01/26/2015

Goal Completion Date \* 01/26/2015

Responsible Party \* Both, Client and Staff

Case Note [Add Case Note]

Target Date \* [Target Date]

% Comp: 0

Assigned Staff: [Assigned Staff]

Restriction \* Shared

Map Issues to Goal

Client presenting issue: [Client presenting issue]


Client issue(s): [Client issue(s)]

Total Rows: 5


Step Order	Step Description	Step Date	Target Date	Status	Completion Date
1	Get High School Transcripts				
2	Tuition Assistance	01/26/2015		Open	

Set Default Completion Date to Today: 01/26/2015

[Save] [Cancel] [Save/Add New Goal]

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.

Goals

Total Rows: 14

[Add New Spreadsheet] [Add New Goals / Steps]

	Goal - Target Compl. Date	% Complete	Case Note
<span style="border: 1px solid red; padding: 2px;">[Edit]</span>	2/23/2015 - 5/24/2015	50%	
<span style="border: 1px solid red; padding: 2px;">[Edit Goals and Steps]</span>	2/23/2015 - 3/25/2015	0%	
<span style="border: 1px solid red; padding: 2px;">[Steps]</span>	2/23/2015 - 3/25/2015	0%	
<span style="border: 1px solid red; padding: 2px;">[Outcomes]</span>	2/23/2015 - 3/25/2015	0%	
<span style="border: 1px solid red; padding: 2px;">[Goal History]</span>	2/20/2015 - 5/21/2015	50%	
<span style="border: 1px solid red; padding: 2px;">[Delete]</span>	2/20/2015 - 5/21/2015	0%	

The Client Goal Steps Line Item form displays.

Client Goal Steps Line Item

Goal: GED Class

Goal Date: 02/23/2015

Goal Completion Date:

Responsible Party: Both, Client and Staff

Goal Weight % to Plan: 25

Case Note: [Case Note](#)

Record Outcome: ☐

Target Date: 03/25/2015

% Comp: 0

Assigned Staff:

Required Goal: Yes

Restriction: Shared

Map Presenting Issues to Goals: ☐

Total Rows: 53

Step Order	Step Description	Step Date	Target Date	Weight	Complete	Status	Completion Date	Goal Step ID
<input checked="" type="checkbox"/> 1	Arrange Tutor	2/23/2015	3/25/2015	40%	0%	Open		1796
<input checked="" type="checkbox"/> 1	Arrange Tutor	2/23/2015	3/25/2015	40%	0%	Open		1796
<input checked="" type="checkbox"/> 1	Arrange Tutor	3/2/2015	4/1/2015	40%	0%	Open		1796
<input checked="" type="checkbox"/> 1	Arrange Tutor	3/2/2015	4/1/2015	40%	0%	Open		1796
<input checked="" type="checkbox"/> 1	Arrange Tutor	3/2/2015	4/1/2015	40%	0%	Open		1796
<input checked="" type="checkbox"/> 1	Arrange Tutor	3/3/2015	4/2/2015	40%	0%	Open		1796
<input checked="" type="checkbox"/> 1	Arrange Tutor	3/3/2015	4/2/2015	40%	0%	Open		1796
<input checked="" type="checkbox"/> 1	Arrange Tutor	3/3/2015	4/2/2015	40%	0%	Open		1796

[Save](#) [Cancel](#)

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.

Total Rows: 53

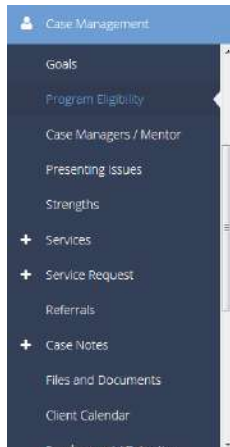
Step Order	Step Description	Step Date	Target Date	Weight	Complete	Status	Completion Date	Goal Step ID
<input checked="" type="checkbox"/> 1	Arrange Tutor	2/23/2015	3/25/2015	40%	0%	Open		1796
<input checked="" type="checkbox"/> 1	Arrange Tutor	2/23/2015	3/25/2015	40%	0%	Open		1796
<input checked="" type="checkbox"/> 1	Arrange Tutor	03/02/2015	04/01/2015	40	0	Open		1796
Set Default Completion Date to Today: 04/07/2015								
Required: Yes								
<input checked="" type="checkbox"/> 1	Arrange Tutor	3/2/2015	4/1/2015	40%	0%	Open		1796
<input checked="" type="checkbox"/> 1	Arrange Tutor	3/2/2015	4/1/2015	40%	0%	Open		1796

Total Rows: 53

Step Order	Step Description	Step Date	Target Date	Weight	Complete	Status	Completion Date	Goal Step ID
<input checked="" type="checkbox"/> 1	Arrange Tutor	2/23/2015	3/25/2015	40%	0%	Open		1796
<input checked="" type="checkbox"/> 1	Arrange Tutor	2/23/2015	3/25/2015	40%	0%	Open		1796
<input checked="" type="checkbox"/> 1	Arrange Tutor	03/02/2015	04/01/2015	40	0	Open		1796
Set Default Completion Date to Today: 04/07/2015								
Required: Yes								
<input checked="" type="checkbox"/> 1	Arrange Tutor	3/2/2015	4/1/2015	40%	0%	Open		1796
<input checked="" type="checkbox"/> 1	Arrange Tutor	3/2/2015	4/1/2015	40%	0%	Open		1796

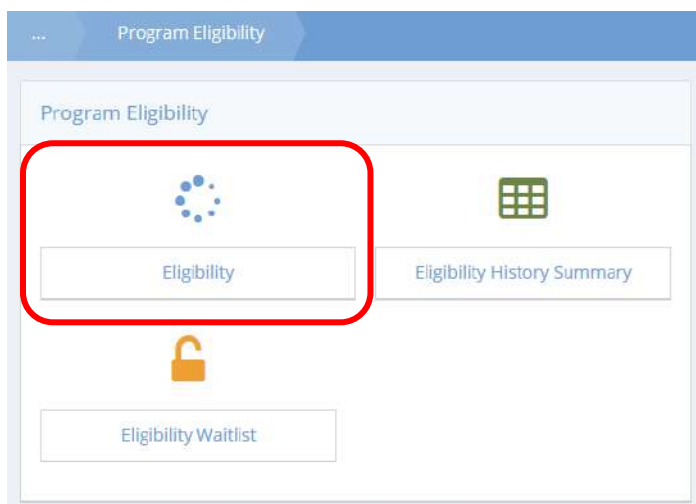
Edit the step as needed. When finished with goal and step editing, click on the [Save](#) button.

## 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.


Program Eligibility				
Total Rows: 1				
Program	Action	Created Date	Is Eligible	Eligibility Rule(s) Not Met
<input checked="" type="checkbox"/> Test		5/8/2015	No	ClientAge >= 50 ClientAge >= 50


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.


Program Eligibility				
Total Rows: 1				
Program	Action	Created Date	Is Eligible	Eligibility Rule(s) Not Met
<input checked="" type="checkbox"/> Test	<div>Put on Wait List --Nothing-- Assessed for Eligibility Enroll Client in Program Put on Wait List Send Referral</div>	05/08/2015	<input type="checkbox"/>	ClientAge >= 50ClientAge >= 50

## Eligibility History Summary

Program Eligibility

  
Eligibility

  
Eligibility History Summary

  
Eligibility Waitlist



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

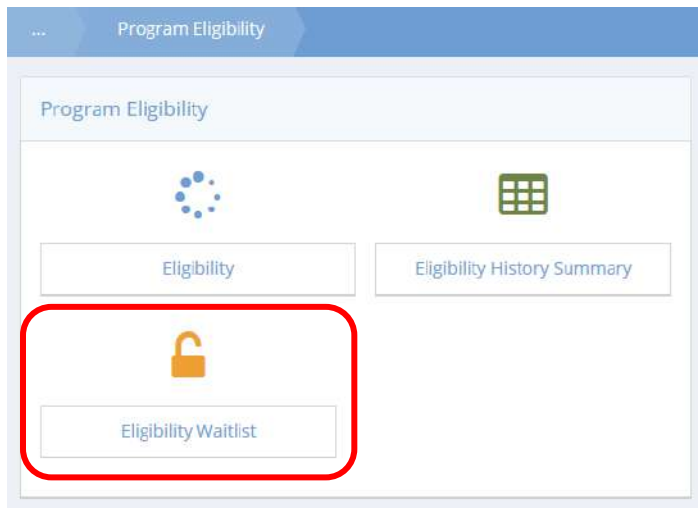
Program Eligibility Summary				
Total Rows: 4				
Program	Action	Is Eligible	Not Eligible Reason	Created Date
Test		False	ClientAge >= 50 ClientAge >= 50	5/8/2015 2:05 PM
Test		False	ClientAge >= 50 ClientAge >= 50	5/8/2015 2:01 PM
Test	Assessed for Eligibility	False	ClientAge >= 50 ClientAge >= 50	5/8/2015 12:00 AM
Test		False	ClientAge >= 50 ClientAge >= 50	2/19/2015 1:37 PM


The Program Eligibility form displays.

Program Eligibility								
Search								
Program	Organization	Action *	Created Date	Is Eligible	Email Contact	Description	Contacts	
<input checked="" type="checkbox"/> Test	All		5/8/2015	No		<a href="#">Description</a>	<a href="#">Contacts</a>	
<input checked="" type="checkbox"/> Test	All None Choose Options...		05/08/2015	<input type="checkbox"/>		<a href="#">Description</a>	<a href="#">Contacts</a>	
<input checked="" type="checkbox"/> Test	All		5/8/2015	No		<a href="#">Description</a>	<a href="#">Contacts</a>	

Click the clear checkbox ☒ for a program and select an action from the drop-down list. Click the [Save](#) button when finished.

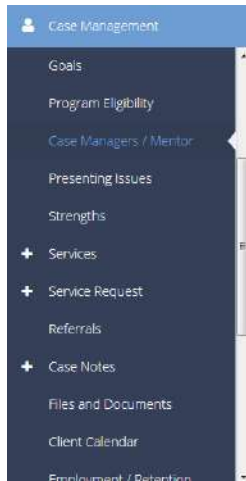
## Eligibility Waitlist



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

Waitlist					
By clicking any one program the system will close all the programs on the wait list for all organizations.					
Total Rows: 21 <span>Search</span>					
Program	Action	Created Date	Is Eligible	Organization	
<input checked="" type="checkbox"/> 12 Permanent Housing for Homeless Disabled	Put on Wait List	11/05/2014	<input checked="" type="checkbox"/>	Kingswood CAP	<input type="text"/>
<input checked="" type="checkbox"/> 12 Permanent Housing for Homeless Disabled	– Nothing –	11/5/2014	Yes	Head Start	
<input checked="" type="checkbox"/> 12 Permanent Housing for Homeless Disabled	Assessed for Eligibility	11/5/2014	Yes	TX GLO	
<input checked="" type="checkbox"/> 12 Permanent Housing for Homeless Disabled	Enroll Client in Program	11/5/2014	Yes	Chrysalis Center Inc.	
<input checked="" type="checkbox"/> 12 Permanent Housing for Homeless Disabled	Put on Wait List	11/5/2014	Yes	Community Health Resources	
<input checked="" type="checkbox"/> 12 Permanent Housing for Homeless Disabled	Send Referral	11/5/2014	Yes	Tabor House	
<input checked="" type="checkbox"/> 12 Permanent Housing for Homeless Disabled	Put on Wait List	11/5/2014	Yes	Org A - Security Testing (ShareB.D)	

## 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.

Provider/User Case Manager Assignments + Add New

Total Rows: 1

Case Manager / Mentor	Program	Begin Date - End Date	Team
Eliason, Adrian	09 Head Start	1/26/2015 - Present	

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.

Edit Provider/User Case Manager Assignment

Client:  Age:

Enrollment #:

Case Manager/Mentor Provider #:

Mentor Team:

Email / Notify Case Manager:

Time period of case assignment

Begin Date #:

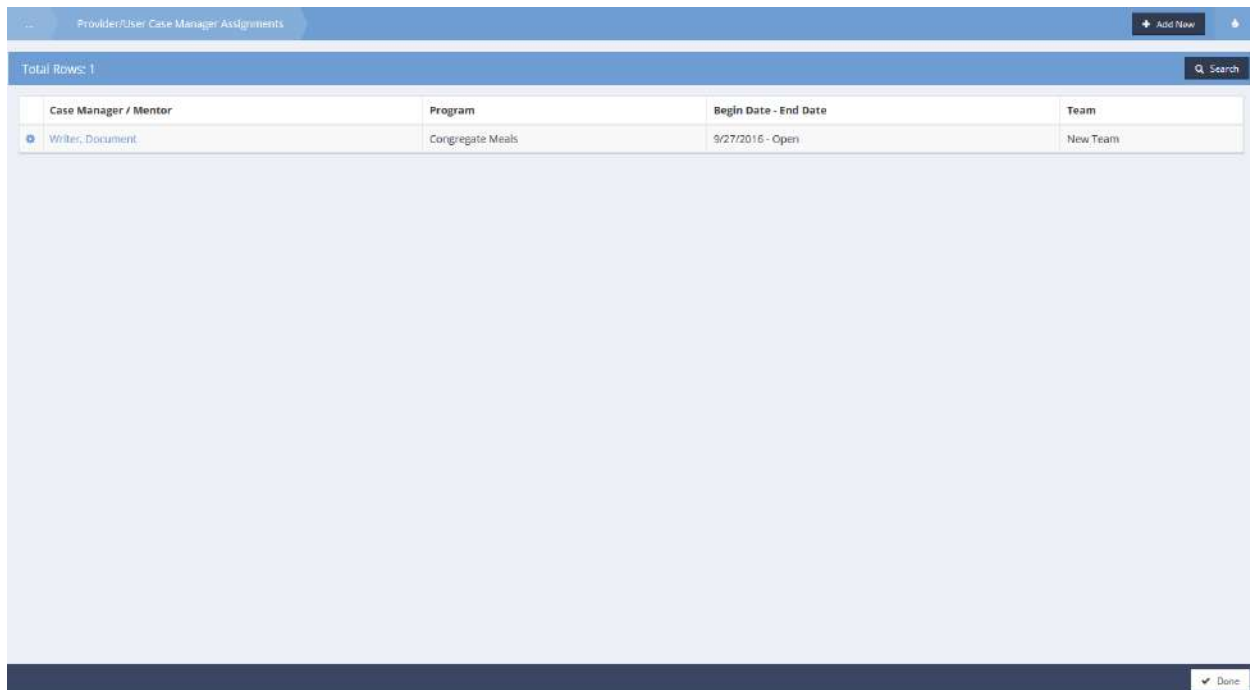
End Date #:

Restriction:


**Objective:** Edit case manager assignments.

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

The Provider/User Case Manager Assignments form displays.



Case Manager / Mentor	Program	Begin Date - End Date	Team
Writer, Document	Congregate Meals	9/27/2016 - Open	New Team

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)*

My Case Manager Assignment

Client: DocTest, Writer

Age: 19

Enrollment: Congregate Meals

Mentor Team: New Team

Case Manager/Mentor Provider: Writer, Document

Email / Notify Case Manager: Create Email


Time period of case assignment

Begin Date: 09/27/2016

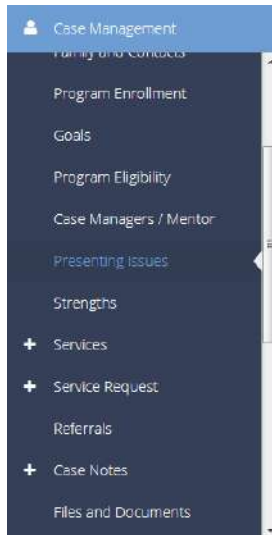
End Date: Open

Restriction: Shared

Save Cancel

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

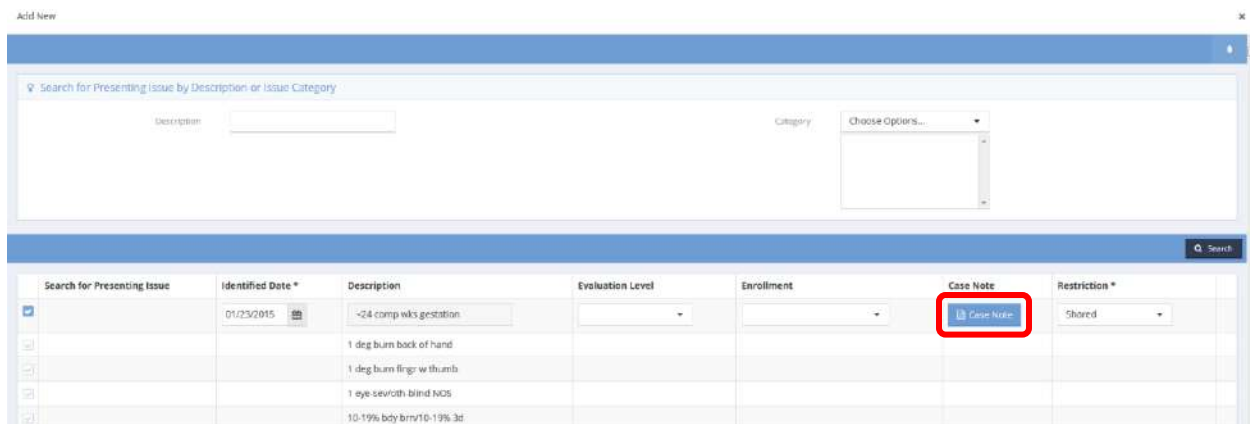
## Presenting Issues



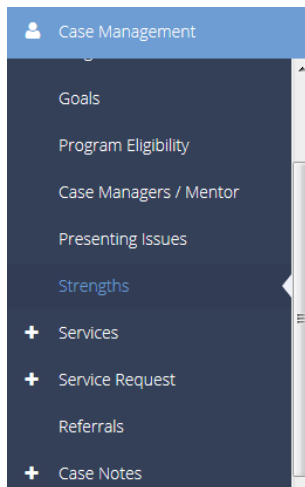
The next menu item in the Case Management menu group is the "Presenting Issues" summary form. This form allows the user to track a client's issues over several different categories. To add a new issue, click the **+ Add New** button in the top right corner of the summary form.



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.

Identified Date	Issue Description	Note	End Date	Restriction
12/15/2014	Employed - Part Time			Shared

The screenshot shows the Strengths table with one data row. The 'Add New' button in the top right corner is highlighted with a red box.

On the Strengths form, click the **+ Add New** button. An Add New form opens in a new window to input strengths.

The screenshot shows the 'Add New' form for Strengths. It has a 'Description' field and a 'Category' dropdown menu. The 'Category' dropdown is open, showing 'Strength Based' as the selected option. The 'Search' button in the bottom right corner is highlighted with a red box.

After selecting the desired parameters, click on the **Search** button.

Results displays in the space below.

Add New

Description:

Category: Choose Options...  
Strength Based

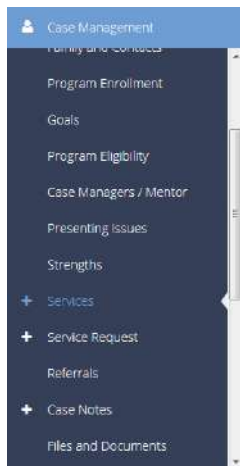
Search

Identified Date *	Description	Enrollment	Case Note	Restriction *
<input checked="" type="checkbox"/> 01/06/2015	Enjoys Art	<input type="text"/>	<input type="button" value="Add Case Note"/>	Shared
<input type="checkbox"/>	Enjoys Sports			
<input type="checkbox"/>	Fresh High School or Equivalent			
<input type="checkbox"/>	Multi-Lingual (Spanish and French)			
<input type="checkbox"/>	Music Talent			

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




## Services

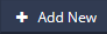


The next menu item in the Case Management menu group is the "Services" summary form. This form displays all the services and associated service data that a client has received.

**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.

Date	Program	Service	Unit Of Measure	Units	Unit Value	Total	Service ID
1/23/2015	Sample prog (HIV)	AA Meeting	1/4 Hours (15 Min Intervals)	1.00	0.26	0.26	1212171
	Sample prog (HIV)	Adult Counseling Service	1/4 Hours (15 Min Intervals)	1.00	0.25	0.25	1212172
	Sample prog (HIV)	Alcohol or Drug Abuse Services	Minutes	1.00	1.00	1.00	1212173



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

Add New

Program \* 09 Head Start Category

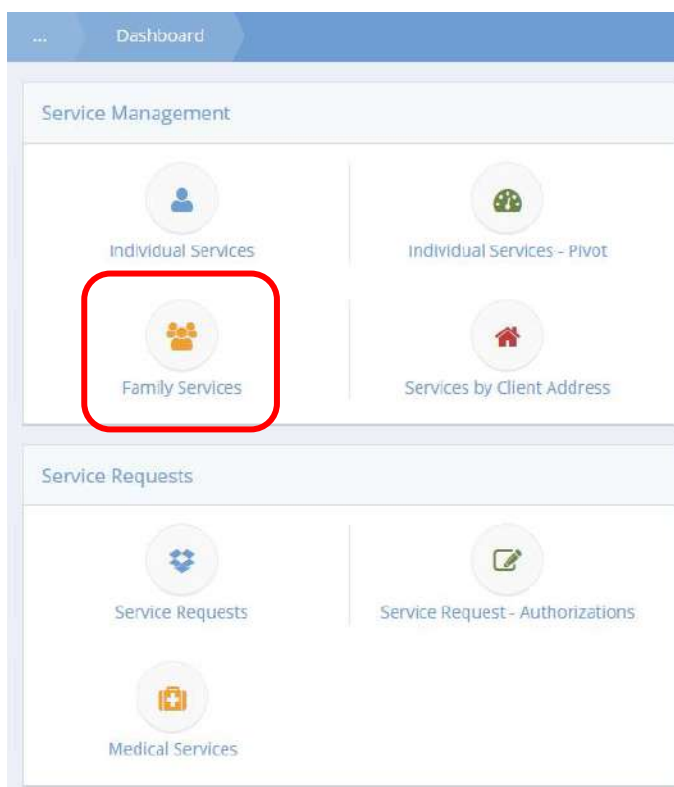
Search

Service	Begin Date	Units *	Unit Value	Total	Account	Method Of Contact	Service ID
AA Meeting		0.00	0.26				161
Adult Counseling Service	01/23/2015	1	0.25	\$0.25			162
Beauty School		0.00	0.00				143
Child Care		0.00	5.00				118
Child Support		0.00	1.00				145

A list of all programs the client is enrolled in displays. Choose a program, then click  Search 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.



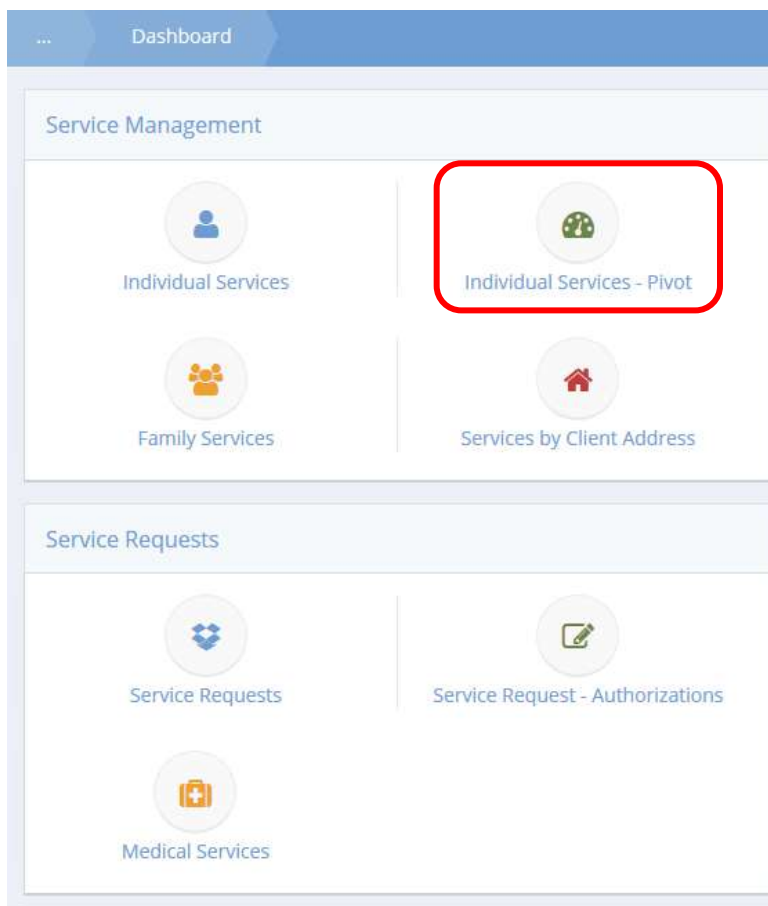
Click the icon for Family Services. The Family Services Summary form displays a list of all posted family services.

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



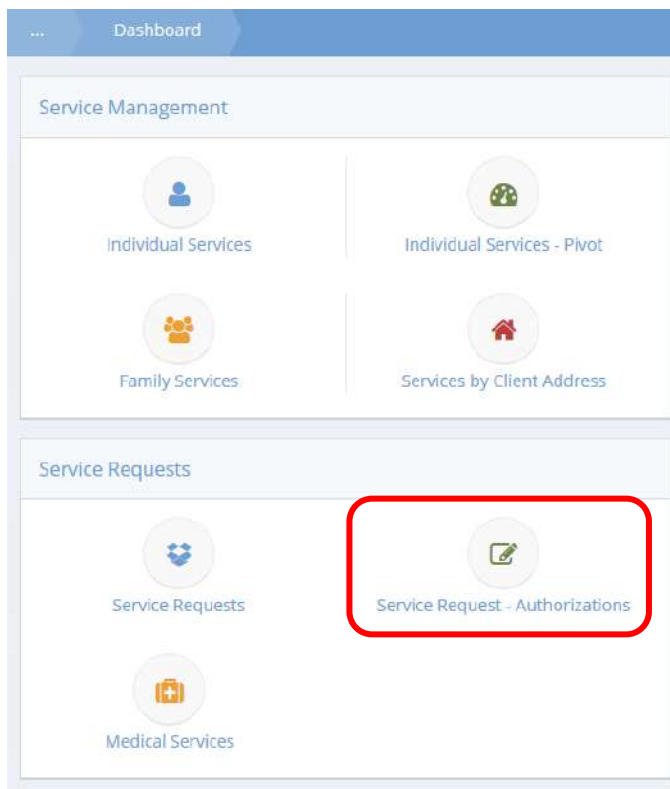
Click the icon for Individual Services – Pivot. The Services pivot table displays.

1	2	3	4	5	6	7	8	9	10	11
	+ Date/Year									
2	+ Program	2014	2015	Total Sum of Total						
3	+ (blank)	302.00	0.00	302.00						
4	+ 09 Head Start	181.75	209.00	390.75						
5	+ 1 English for Employment		1.00	1.00						
6	+ 15 Supportive Services Only	1.00		1.00						
7	+ 16 HIMS (ES)	1.00	125.00	126.00						
8	+ 2 YAGA	5.00		5.00						
9	+ BH Program		196.50	196.50						
10	+ CC Supervised Living	4.00		4.00						
11	+ Employment Job Match Program	4.00	26.00	30.00						
12	+ Family VI SPDAT	15.00		15.00						
13	+ In Home Services		0.00	0.00						
14	+ Medical Program		102.00	102.00						
15	+ VI SPDAT Program	30.00		30.00						
16	Grand Total	543.75	659.50	1,203.25						
17										
18										
19										
20										
21										
22										
23										
24										

**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.


The screenshot shows the 'Service Request Summary' page. At the top right, there are two buttons: '+ Add Utility Assessor' and '+ Authorized Service' (highlighted with a red box). Below the buttons is a table with the following data:

	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.

The screenshot shows the 'Service Request - Authorization' form. It is divided into several sections: 'Account Balance and Service Remaining Summary' (with 'Service Remaining' and 'Account Balance' labels), 'Requesting Service From' (containing dropdowns for Enrollment, Service Authorization, and Family Or Individual, and input fields for Account, Service, and Transaction Date), 'Payment To' (containing input fields for Payee, Address, Address 2, Zip Code, City, and State), and 'Request Information' (containing input fields for Reference, Reference Date, Due Date, Quantity, Unit Rate, Amount, and Authorized By). A 'Save' button is located at the bottom right of the form.










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; inadequate	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  button when finished.

## HMIS Services

**Navigation:** Case Management>Case Management>Services

### HMIS Services Summary

Services Summary <span>+ Add New</span>					
Date	Project	Service	Units	Unit Value	Total
11/25/2014	09 Head Start	AA Meeting	1.00	\$0.50	\$0.50
11/25/2014	09 Head Start	Beauty School	1.00	\$0.25	\$0.25
11/25/2014	12 Permanent Housing for Homeless Disabled	Bus Tokens	1.00	\$1.00	\$1.00
11/25/2014	12 Permanent Housing for Homeless Disabled	Transitional Housing	1.00	\$0.00	\$0.00

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

### HMIS Service Spreadsheet

Project ▼

Search

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.

Add New <span>×</span>					
Project <span>▼</span> 09 Head Start					
Total Rows: 21 <span>Search</span>					
Service	Begin Date	Units *	Unit Value	Total	Account
<input checked="" type="checkbox"/> AA Meeting		0	0.50	\$0.50	
<input checked="" type="checkbox"/> Adult Counseling Service		0	10.00	\$10	
<input checked="" type="checkbox"/> Beauty School		0	0.25	\$0.25	
<input checked="" type="checkbox"/> Child Care		0	5.00	\$5	
<input checked="" type="checkbox"/> Child Support		0	1.00	\$1	
<input checked="" type="checkbox"/> Computer Programming		0	0.25	\$0.25	
<input checked="" type="checkbox"/> Parental Exam		0	1.00	\$1	

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

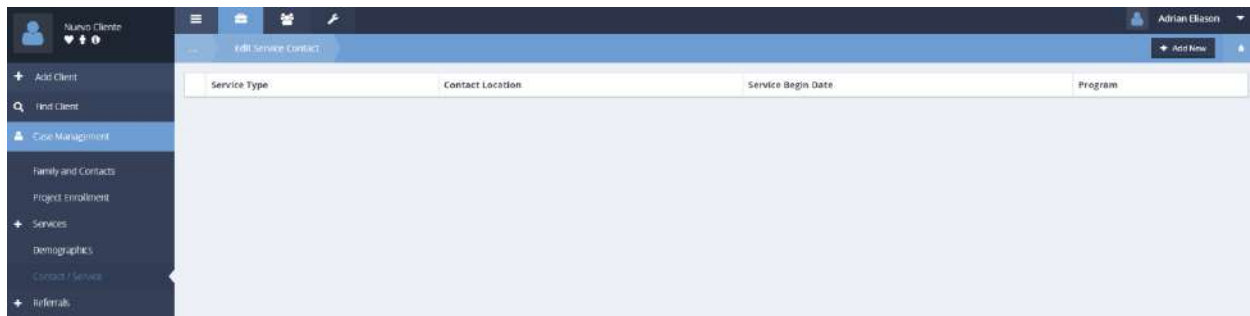
<input checked="" type="checkbox"/> Computer Programming	11/25/2014	1	0.25	\$0.25	<span>▼</span>
----------------------------------------------------------	------------	---	------	--------	----------------

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



## HMIS Service Contact

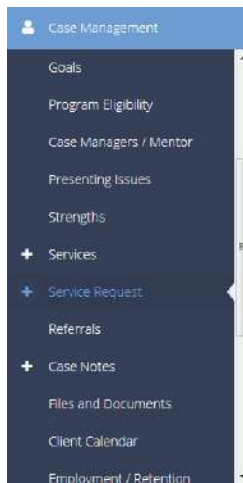
**Navigation:** Case Management>Case Management>Contact/Service



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.

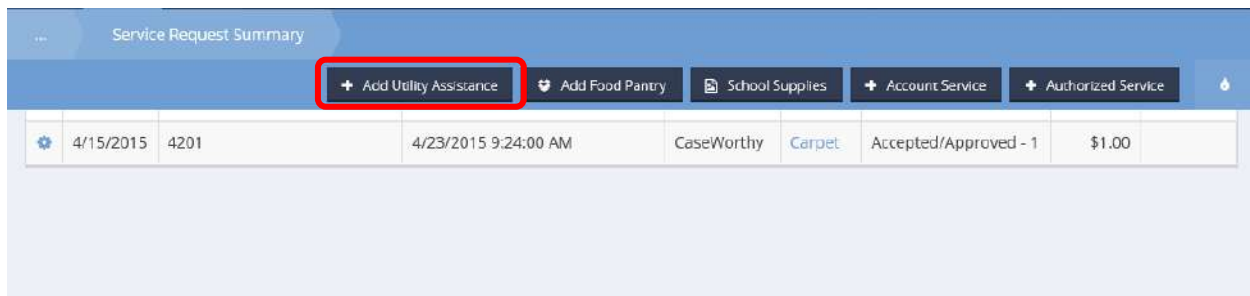
## Service Request



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.

**Add Service Request**

**Account Balance and Service Remaining Summary**

Service Remaining

Account Balance

**Requesting Service From**

Enrollment #  Account

Service #  WF\_AllowZero

Program  ContextID

WF\_ServiceMethod  ContextTypeID

Transaction #  Date

**Payment To**

Payee

Address  Address 2

Zip Code  City  State

**Request Information**

Reference #  Reference Date #  Due Date

Quantity #  Unit Rate #  Amount #

Authorized By   Shut-Off Date

Pledge Information

**Case Note and Restriction**

Case Note  Restriction


**Denied or On-hold**








Is Deny or Hold ☐







**Recurrence Info**

Recurrence ☐

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  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 Summary			
	Date	ProviderReferral.CreatedBy	ProviderReferral.CreatedDate
			1/5/2015 3:56:00 PM
			12/3/2014 3:32:00 PM
			12/3/2014 3:43:00 PM
			7/31/2014 12:00:00 AM
			7/29/2014 12:00:00 AM
			7/29/2014 12:00:00 AM
			7/29/2014 12:00:00 AM

 View Service Request  
 View Service Request History  
 Hold Details  
 Food Pantry Service Request  
 Emergency Assistance Request  
 Deny


## 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.

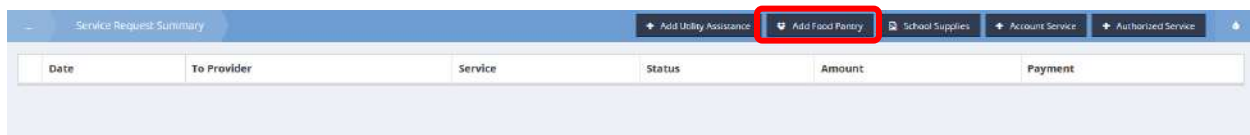
Account Balance:	Account Description	Available Balance	Committed Amount
	2011 Demo	\$-0.28	\$1,735.28

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.

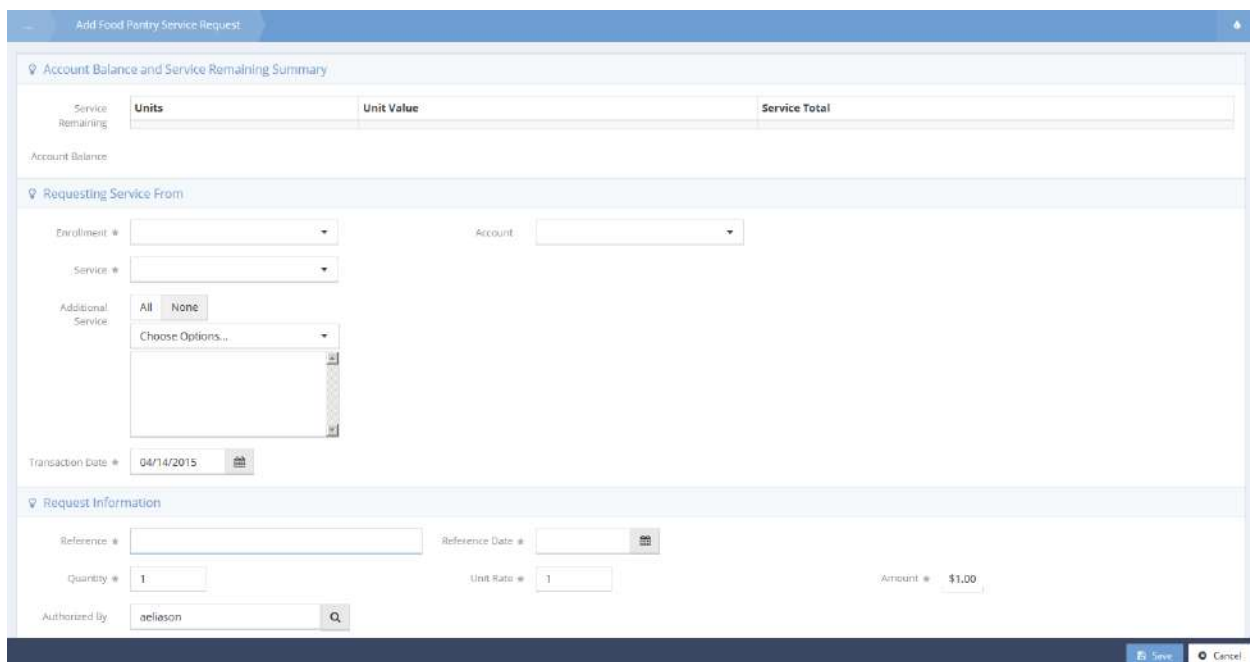
## Add New Food Pantry Service Request

**Objective:** Add a request for food or utility assistance.



Date	To Provider	Service	Status	Amount	Payment

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



**Account Balance and Service Remaining Summary**

Service Remaining	Units	Unit Value	Service Total


Account Balance:  

**Requesting Service From**


Enrollment #:   Account:  

Service #:  


Additional Service: All None Choose Options...



Transaction Date: 04/14/2015 


**Request Information**

Reference #:   Reference Date:   


Quantity: 1 Unit Rate: 1 Amount: \$1.00

Authorized By: aolson 

 Save  Cancel

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.




## Add After School Service Request


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




Date	To Provider	Service	Status	Amount	Payment
------	-------------	---------	--------	--------	---------

From the Request for Service from, click on the  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.

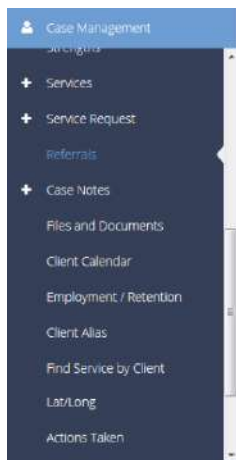
To enter pledge information, check the check box. The form expands to reveal the pledge information section.

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.



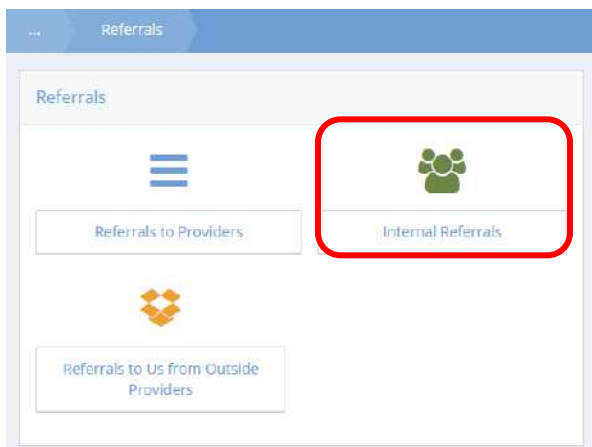
The Referral In Summary form displays. To add a new referral in, click the **+ Add New** button in the top right corner. Use the **Multi Referral In** button if the client was referred for more than one specific service.

Referral In Summary			+ Add New	Multi Referral In
Total Rows: 2			Search	
Referral Date	Refer From Provider	Referral Service		
1/26/2015 12:00:00 AM	45rtyhj	AA Meeting		
1/26/2015 12:00:00 AM	456yujik	ADC		

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

The screenshot shows two sections of a form. The top section, 'Referral In Information', contains fields for 'Referral Date' (01/26/2015), 'Service' (a dropdown menu), and 'Referral From' (a searchable text field). The bottom section, 'Case Note and Restriction Information', contains a 'Case Note' field with a 'Case Note' button and a 'Restriction' dropdown menu set to 'Shared'.

## 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.

The screenshot shows the 'Client Referrals' table. At the top right, there is a '+ Add New' button highlighted with a red box. Below the header, there is a message: 'Please Note - You can't edit an Accepted/Approved Referral.' The table has a blue header row and one data row. The data row shows a referral for 'Bosell, Steve' on '1/26/2015 12:00:00 AM' for 'Case Management' service, referred by 'Referral - Internal'.

Referral Date	Client Name	Service	Provider Referral Type	Refer to User	Case Note
1/26/2015 12:00:00 AM	Bosell, Steve	Case Management	Referral - Internal		

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

The screenshot shows the 'Internal Referrals Input' form. It includes fields for 'Referral Date' (set to 01/26/2015), 'Service' (a dropdown menu), and 'Refer to Person' (a dropdown menu). Below these is a 'Case Note' section with a text area and a 'Case Note' button. At the bottom, there is a section for emailing the provider, with a 'Create Email' button.

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

The screenshot shows the 'Client Referrals' table. A message at the top states: 'Please Note - You can't edit an Accepted/Approved Referral.' The table has columns: Client Name, Service, Provider Referral Type, Refer to User, and Case Note. The first row shows 'Cliente: Nuevo', 'Case Management', 'Referral - Internal', and an empty 'Refer to User' and 'Case Note' field. An action menu is open over the first row, showing options: 'Edit', 'Referral Report', and 'Delete'.

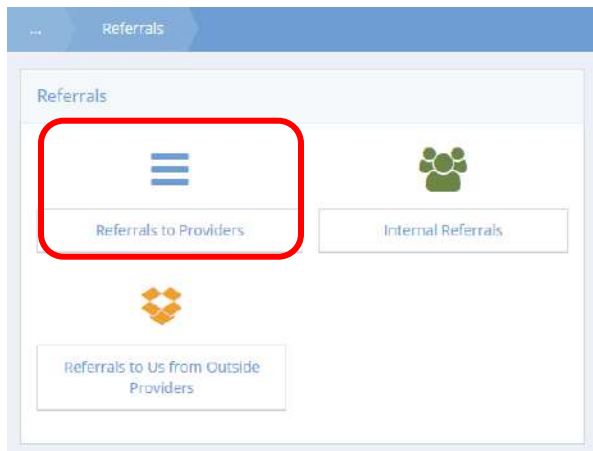
To edit a referral, click the associated action gear  and select Edit from the pop up menu that appears.



The Edit Provider Referral form displays.

The screenshot shows the 'Edit Provider Referral' form. It includes fields for 'Service' (Case Management), 'Referral Status' (Referred), 'Referral Outcome' (a dropdown menu), and 'Refer To UserID' (a dropdown menu). Below these is a section for 'Internal Referral Provider Information' with fields for 'Provider' (CaseWorthy), 'Address' (740 East 3900 South), 'City' (Salt Lake City), 'State' (UT), 'Phone' (801-888-9999), and 'Email' (eknudtson@myecm.net). At the bottom, there is a 'Case Note, Create Email and Restriction Options' section with a 'Case Note' button, a 'Create Email' button, and a 'Restriction' dropdown menu (set to Shared).

Make any changes and click on the  Save 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".

Client Referrals

+ Add New Internal

+ Add New External

Q Multi Referral

+ WF Add New

Total Rows: 4

Voucher	Referral Date	Provider Name, Address, City	Service	Referral Type	Case Note	Refer to User ID
<div> <div></div> <div>Edit</div> </div>	1/15 8:55 AM	Provider B, 123 Sunnyside Road B, SCHENECTADY	AA Meeting	Referral Out - External Providers		
<div> <div></div> <div>Referral Report</div> </div>	1/15 8:55 AM	Banner Health, 1441 North 12th Street, Phoenix, AZ, AZ	AA Meeting	Referral Out - External Providers		
<div> <div></div> <div>Delete</div> </div>	1/15 8:54 AM	Banner Health, 1441 North 12th Street, Phoenix, AZ, AZ	AA Meeting	Referral Out - External Providers		
<div> <div></div> <div></div> </div>	1/26/2015 8:49 AM	Heed Start, .	AA Meeting	Referral Out - External Providers		

The Add New External form displays.

Add New External

Refer To \*

Refer to Person


Referral Date \*  01/26/2015  09:08

Referral Status and Outcome (if known)

Referral Status:  Referred

Referral Outcome:  Unknown

Referral Voucher Information

Provider Voucher to Client 


Reference Date \*

Reference Number \*

Authorized Amount \*  0.00


Authorized By \*  aelanson

Case Note and Restriction Information

Case Note  

Restriction  Shared

To email the provider this referral, select the email option below.

Email Provider  

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.

WF Add New

Refer To: [Look-up field] Service: [Field]

Refer to Person: [Dropdown]

Referral Date: 12/12/2014 [Calendar icon]

Referral Status and Outcome (if known)

Referral Status: Referred Referral Outcome: Unknown

Referral Voucher Information

Provider Voucher to Client: [Checkbox]

Case Note and Restriction Information

Case Note: [Case Note button]

Restriction: Shared

To email the provider this referral, select the email option below.

Email Provider: [Update Email button]

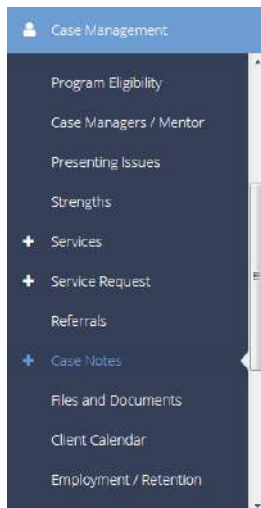
Map Referral to Client's Presenting Issues: [Checkbox]

Provider Referral Number (if known): 14

Save Cancel

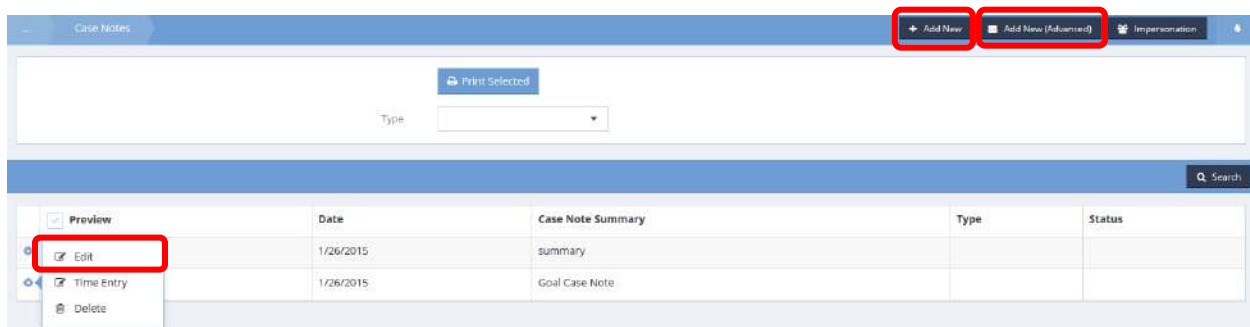
Fill out all required fields and click on **Save** button.


## 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.*

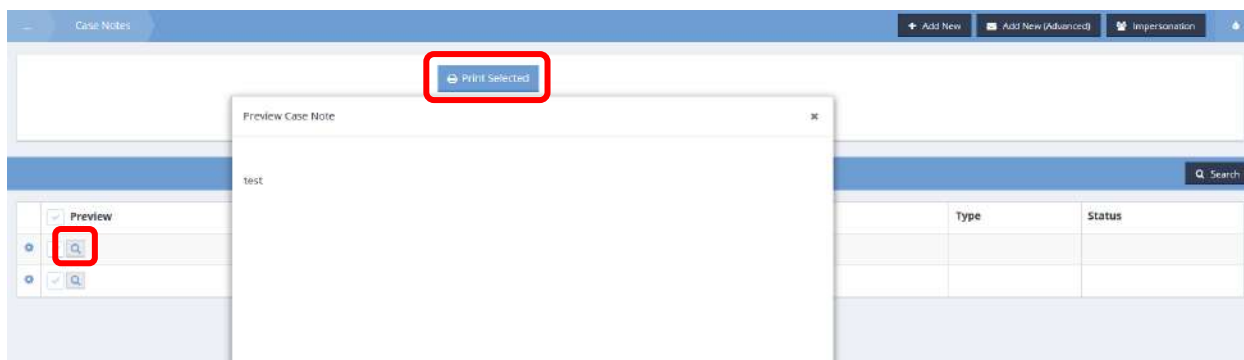


From the action gear , the user can edit an existing case note. To enter a new case note, click the **+ Add New** button or **+ Add New (Advanced)** button. The **+ Add New (Advanced)** button allows a user to enter an electronic signature to the case note as well as track time case managers spend with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



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

## Print Case Notes



Client: Steve Bosell Date: 1/26/2015 9:39:00 AM


Created By: Adrian Eliason

Mr Bosell has been enrolled in an anger management class.

## Edit Case Note and Time

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

Case Notes				
<div>Print Selected</div> <div>Type: <input type="text"/></div>				
Total Rows: 3				
	Preview	Date	Case Note Summary	Type
<input checked="" type="checkbox"/>		4/16/2015	summary	Shift Note
<input checked="" type="checkbox"/>		1/26/2015	Anger Management	
<input checked="" type="checkbox"/>		1/26/2015	Goal Case Note	

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

Case Notes				
<div>Print Selected</div> <div>Type: <input type="text"/></div>				
Total Rows: 3				
	Preview	Date	Case Note Summary	Type
<input checked="" type="checkbox"/>		4/16/2015	summary	Shift Note
<input checked="" type="checkbox"/>		1/26/2015	Anger Management	
<input checked="" type="checkbox"/>		1/26/2015	Goal Case Note	



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™.

Preview	Date	Case Note Summary	Type	Status
	1/26/2015	Anger Management		
	1/26/2015	Goal Case Note		

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

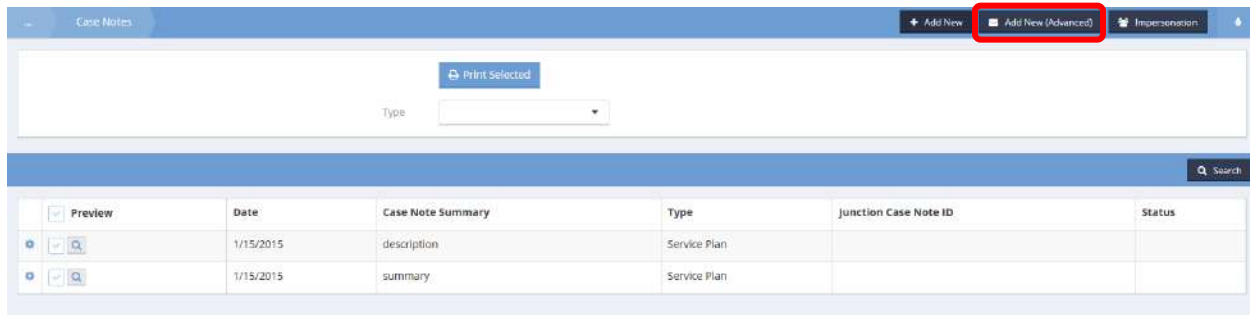
Enter the summary and select the template and type from the drop-down lists. Enter the notes into the body and select the sharing from the drop-down list. Indicate if the note is read only and add a signature. Click the Post Service/Time Entry check box.

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

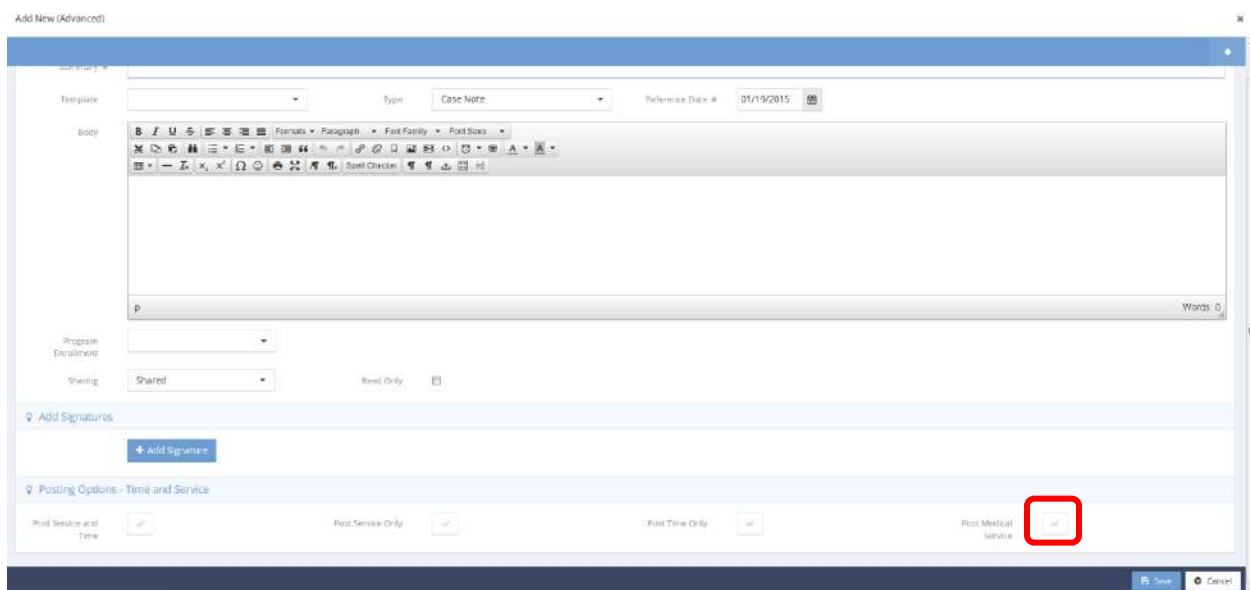
**Objective:** Post a new medical billing service.



The screenshot shows the 'Case Notes' interface. At the top, there is a blue header bar with a 'Case Notes' tab and buttons for '+ Add New', '+ Add New (Advanced)' (highlighted with a red box), and 'Impersonation'. Below the header, there is a 'Print Selected' button and a 'Type' dropdown menu. A search bar is located on the right side of the interface. Below the search bar, there is a table with the following columns: 'Preview', 'Date', 'Case Note Summary', 'Type', 'Junction Case Note ID', and 'Status'. The table contains two rows of data.

Preview	Date	Case Note Summary	Type	Junction Case Note ID	Status
	1/15/2015	description	Service Plan		
	1/15/2015	summary	Service Plan		

Click the **Add New (Advanced)** button.



The screenshot shows the 'Add New (Advanced)' form. At the top, there is a blue header bar with a 'Case Entry' tab. Below the header, there is a 'Template' dropdown menu, a 'Type' dropdown menu set to 'Case Note', and a 'Reference Date' field set to '01/19/2015'. The main body of the form is a large text area with a rich text editor toolbar. Below the text area, there is a 'Program Enrollment' dropdown menu, a 'Sharing' dropdown menu set to 'Shared', and a 'Read Only' checkbox. Below these, there is a section for 'Add Signatures' with a '+ Add Signature' button. At the bottom, there is a section for 'Posting Options - Time and Service' with four checkboxes: 'Post Service and Time', 'Post Service Only', 'Post Time Only', and 'Post Medical Service' (highlighted with a red box). At the bottom right, there are 'Save' and 'Cancel' buttons.

Click the checkbox for Post Medical Service.

The Post Medical Service form displays in a new window.

Post Medical Service

Begin Date: 01/19/2015  
 End Date: 01/19/2015  
 Enrollment:   
 Location:   
 Service:   
 Unit Of Measure:   
 Units:   
 CPT Code:   
 Progress: Choose Options...  
 Type: Regular  
 Activity: Direct - Face to Face  
 Location:   
 Status:   
 Service Total: NaN  
 Modifier:   
 Update

Fill out all necessary info and click the [Update](#) button.

## Edit Medical Billing Service

**Objective:** Edit a medical billing service.

Case Notes

Print Selected

Type:   
 Search

Preview	Date	Case Note Summary	Type	Junction Case Note ID	Status
	1/16/2015	TEST CPT	Case Note	2308	
	1/15/2015	Test Junction Case Note	Case Note	2296	
	1/15/2015	Test Service and Time	Case Note	2294	
	1/15/2015	Test	Case Note	2292	
	1/15/2015	TEST	Case Note	2290	
	1/15/2015	Test	Case Note	2288	
	1/15/2015	Test	Case Note	2286	
	1/15/2015	Test	Case Note	2284	
	2/30/2014	Case Note Preview Default			
	2/30/2014	CC Boston			

Edit  
 Time Entry  
 Edit Time and Note  
 Edit Medical Service  
 Delete

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

The Edit Medical Billing Service form displays.


The screenshot shows the 'Edit Medical Billing Service' form. The top section contains the following fields:

- Begin Date: 01/16/2015
- End Date: 01/16/2015
- Enrollment: BH Program
- Service: Therapeutic, Prophylactic or Diagnostic Inj
- Unit Of Measure: Dollar
- Units: 3.00
- CPT Code: 90772
- Diagnosis: Choose Options... (dropdown menu showing 290.13 Presenile dementia with depressive fe and 290.21 Senile dementia with depressive fea)
- Location: CaseWorthy
- BMS: No
- Unit Value: 11.90
- Service Total: 35.7
- Modifier: AU
- Case Note: Case Note (button)

The bottom section, titled 'Time', contains the following fields:

- Type: Regular
- Activity: Direct - Face to Face
- Plan/Goal: (dropdown menu)
- Start Date / Time: 01/16/2015 12:00 a
- End Date / Time: 01/16/2015 12:00 a
- Time Hours: 0

At the bottom right of the form, there is a 'Save' button and a 'Cancel' button.

Make any necessary changes and click .

## Release of Information

**Objective:** Manage release of information for clients.

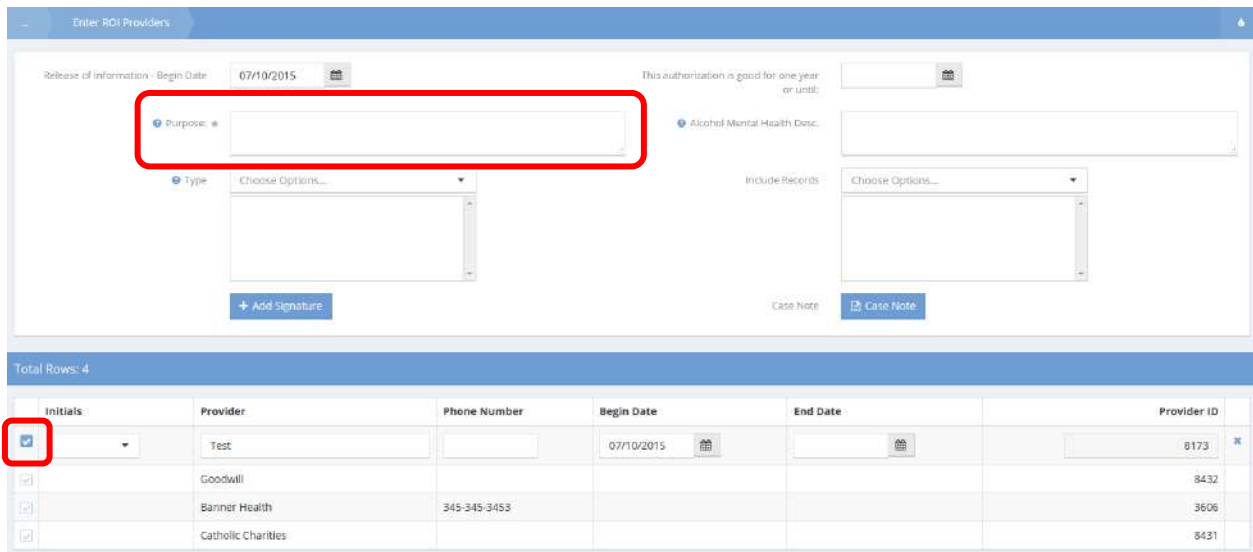


Release of Information Summary

Total Rows: 1

ROI Begin - End Date	Purpose:	Alcohol / Mental Health Desc	Case Note
7/10/2015 - 7/22/2015	testing		

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



Enter ROI Providers

Release of Information - Begin Date: 07/10/2015

This authorization is good for one year or until:

Purpose:

Type: Choose Options...

Alcohol / Mental Health Desc:

Include Records: Choose Options...

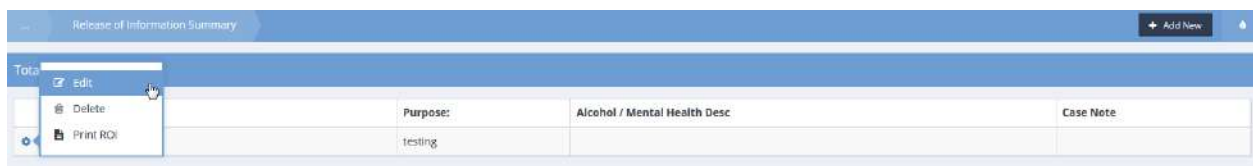
+ Add Signature

Case Note:

Total Rows: 4

Initials	Provider	Phone Number	Begin Date	End Date	Provider ID
<input checked="" type="checkbox"/>	Test		07/10/2015		6173
<input type="checkbox"/>	Goodwill				8432
<input type="checkbox"/>	Banner Health	345-345-3453			3606
<input type="checkbox"/>	Catholic Charities				8431


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



Release of Information Summary

Total Rows: 1

ROI Begin - End Date	Purpose:	Alcohol / Mental Health Desc	Case Note
7/10/2015 - 7/22/2015	testing		

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

The Enter ROI Providers form displays.

Enter ROI Providers

Release of information - Begin Date \*

07/10/2015

This authorization is good for one year or until:

07/22/2015

Purpose:

testing

Alcohol Mental Health Desc:

Type

Choose Options...

Drug/alcohol diagnosis, treatment or referral inf

Include Records

Choose Options...

Alcohol Drug Treatment


+ Add Signature

Case Note

Case Note

Total Rows: 4

	Initials *	Provider	Phone Number	Begin Date	End Date *	Provider ID
<input checked="" type="checkbox"/>		Test:		7/10/2015		8173
<input checked="" type="checkbox"/>		Goodwill				8432
<input checked="" type="checkbox"/>		Banner Health	345-345-3453			3606
<input checked="" type="checkbox"/>		Catholic Charities				8431

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.

The screenshot shows the 'Case Notes' form. At the top, there is a blue header bar with the title 'Case Notes' and several action buttons: '+ Add New', 'Add New (Advanced)', 'Impersonation', and 'Counseling Note'. Below the header, there is a 'Print Selected' button and a 'Type' dropdown menu. A status bar indicates 'Total Rows: 7' and includes a search icon. The main content is a table with the following columns: 'Preview', 'Reference Date', 'Case Note Summary', 'Type', 'Status', 'Addendums', and 'Created Date'. The table contains 7 rows of data. Each row has a 'Preview' column with a magnifying glass icon, a 'Reference Date', a 'Case Note Summary', a 'Type', a 'Status', an 'Addendums' column with a count (all are 0), and a 'Created Date'.

Preview	Reference Date	Case Note Summary	Type	Status	Addendums	Created Date
	6/9/2015	Client Data Default	Case Note		0	6/9/2015 2:20 AM
	6/9/2015	Case Note Preview Default	Case Note		0	6/9/2015 2:09 AM
		CICP Letter			0	6/9/2015 1:53 AM
	6/8/2015	Client Release Email dbates	Case Note		0	6/8/2015 6:36 AM
		CICP Letter			0	6/5/2015 5:24 AM
		CC Boston	Wait List		0	6/5/2015 5:14 AM
	6/4/2015	CICP Letter	Case Note		0	6/4/2015 7:36 AM

At the bottom right of the form, there is a 'Done' button.

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



The Case Notes form displays.

Case Notes

Print Selected

Type

Total Rows: 1

Preview	Reference Date	Case Note Summary	Type	Status	Created Date
<input checked="" type="checkbox"/>	6/9/2015	Case Note Preview Default	Case Note		6/9/2015 2:09 AM

Done

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 Original Note and Add Addendums

Reference Date: 05/25/2016

Case Note Type: Case Note

Summary: Medical Service Test

Description: My Case Note

Sharing: Shared

Family or Individual: Individual

Add Signature

Summary	Enrollment *
<input checked="" type="checkbox"/>	

Reference Date: [Calendar Icon]

Note ID: -1

Save Cancel

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

The screenshot displays a web-based form for adding an addendum. At the top right, there is a blue button labeled "+ Add Row". The form is divided into several sections:


- Summary**: A text input field.
- Enrollment \***: A dropdown menu.
- Reference Date**: A date picker.
- Note ID**: A text input field with the value "-1".
- Template**: A dropdown menu.
- Type**: A dropdown menu.
- Description**: A large text area with a rich text editor toolbar above it. The toolbar includes options for bold, italic, underline, strikethrough, text color, background color, bulleted list, numbered list, link, unlink, image, video, and a spell checker. The text area contains the letter "p".
- Words**: A counter showing "0".
- Sharing**: A dropdown menu set to "Shared".
- Family or Individual**: A dropdown menu.
- Read Only**: A checkbox.
- + Add Signature**: A blue button.

At the bottom right of the form, there are two buttons: "Save" and "Cancel".


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 **+ Add New** 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.




Photo	File Label	Photo Default	Created by	Created Date	Photo Default
	Koala.jpg	Yes	aellason	1/26/2015	

Either navigate to the desired photo to upload or click  and then click the  button. Click  when finished.



Add New

Client Web Cam Photo

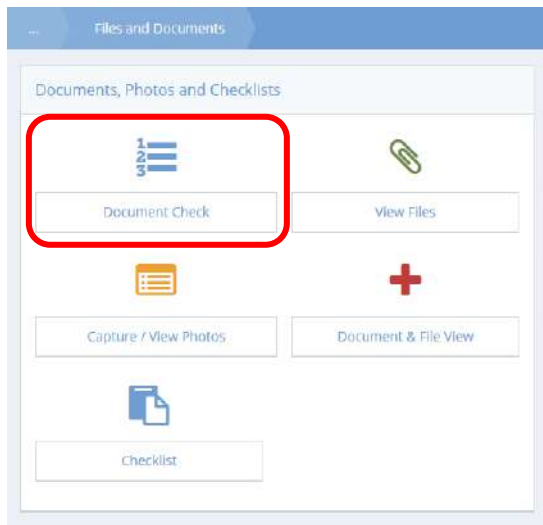
  

Upload Client Photo



## Client Documents

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

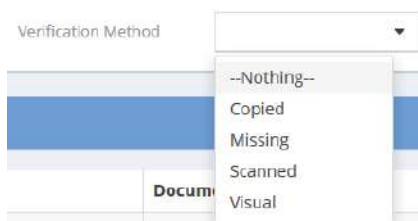



Click on the Document Check icon on the Documents, Photos and Checklists menu. The Document Check form displays a list of the current client's documents.

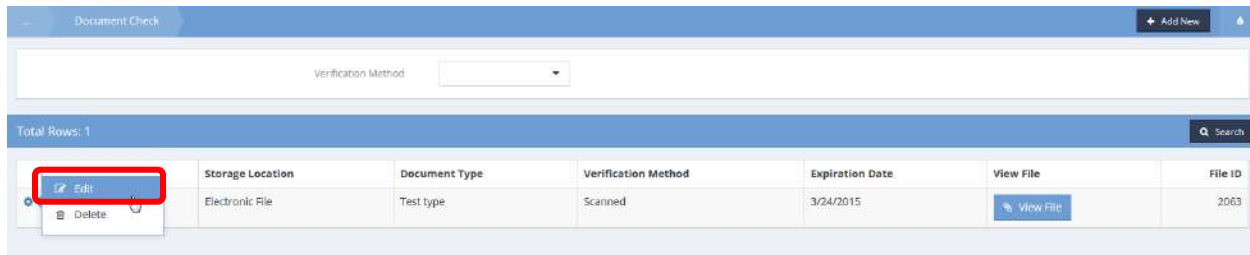
A screenshot of the 'Document Check' form. At the top, there is a 'Verification Method' dropdown menu. Below it, a table displays a list of documents. The table has columns for 'Created Date', 'Storage Location', 'Document Type', 'Verification Method', 'Expiration Date', 'View File', and 'File ID'. The first row shows a document created on 3/17/2015, stored as an 'Electronic File', with a 'Test type' document type, 'Scanned' verification method, and an expiration date of 3/24/2015. The 'View File' column has a 'View File' button. The 'File ID' is 2063.

Created Date	Storage Location	Document Type	Verification Method	Expiration Date	View File	File ID
3/17/2015	Electronic File	Test type	Scanned	3/24/2015	<a href="#">View File</a>	2063

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.



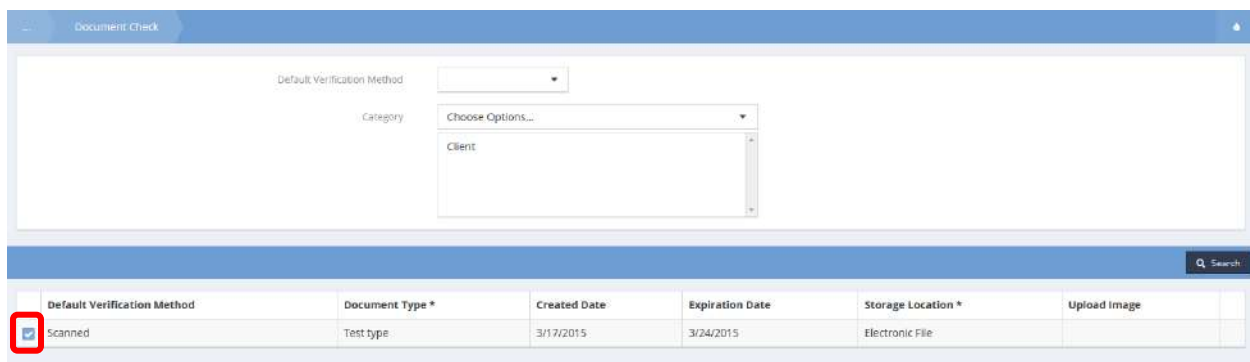
Click on the action gear  icon associated with the desired document and select Edit from the pop up menu that appears.



The screenshot shows the 'Document Check' interface. At the top, there is a 'Verification Method' dropdown. Below it, a table lists document entries. The first row is highlighted, and a context menu is open over it, with the 'Edit' button (represented by a gear icon) highlighted by a red rectangle. The table columns are: Storage Location, Document Type, Verification Method, Expiration Date, View File, and File ID.


Storage Location	Document Type	Verification Method	Expiration Date	View File	File ID
Electronic File	Test type	Scanned	3/24/2015	<a href="#">View File</a>	2063

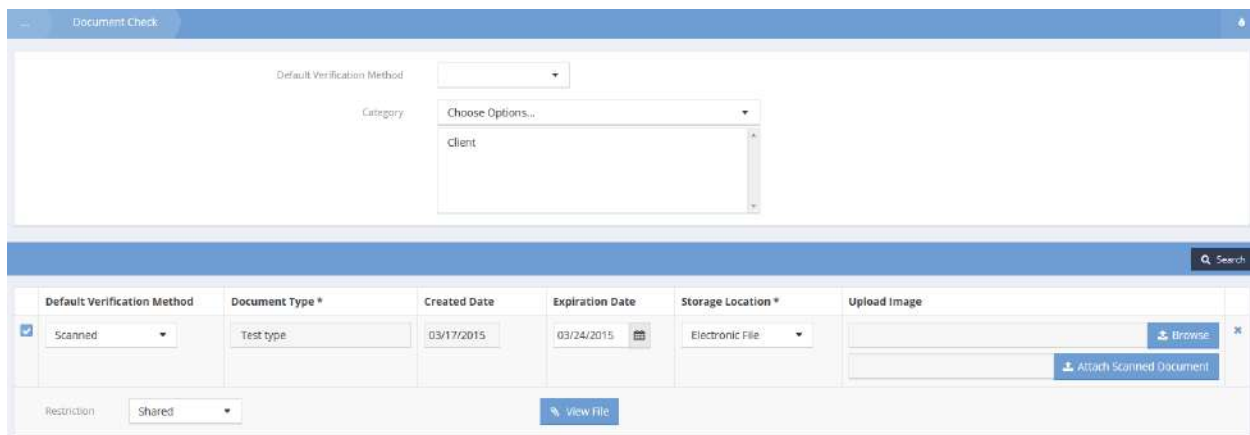
The Document Check form displays.



The screenshot shows the 'Document Check' form. It includes a 'Default Verification Method' dropdown, a 'Category' dropdown with a 'Choose Options...' button, and a 'Client' text input field. Below the form is a table with columns: Default Verification Method, Document Type \*, Created Date, Expiration Date, Storage Location \*, and Upload Image. The first row is highlighted, and a blue checkbox is checked in the first column, highlighted by a red rectangle.

Default Verification Method	Document Type *	Created Date	Expiration Date	Storage Location *	Upload Image
<input checked="" type="checkbox"/> Scanned	Test type	3/17/2015	3/24/2015	Electronic File	

Click on the blue checkbox  for the document. The row expands. Make any desired changes and click on the [Save](#) button.

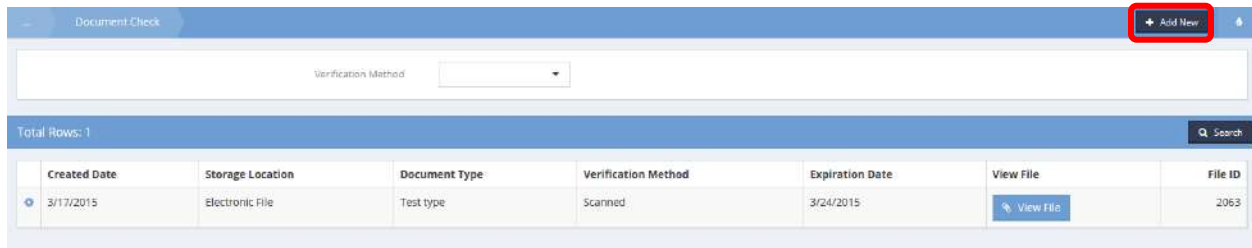


The screenshot shows the 'Document Check' form with the row expanded. The expanded row includes a 'Default Verification Method' dropdown (set to 'Scanned'), a 'Document Type \*' dropdown (set to 'Test type'), 'Created Date' (03/17/2015), 'Expiration Date' (03/24/2015), 'Storage Location \*' dropdown (set to 'Electronic File'), and an 'Upload Image' section with a 'Browse' button and an 'Attach Scanned Document' button. Below the expanded row is a 'Restriction' dropdown (set to 'Shared') and a 'View File' button.

Default Verification Method	Document Type *	Created Date	Expiration Date	Storage Location *	Upload Image
<input checked="" type="checkbox"/> Scanned	Test type	03/17/2015	03/24/2015	Electronic File	<input type="text"/> <a href="#">Browse</a> <input type="text"/> <a href="#">Attach Scanned Document</a>

Restriction: [Shared](#) [View File](#)

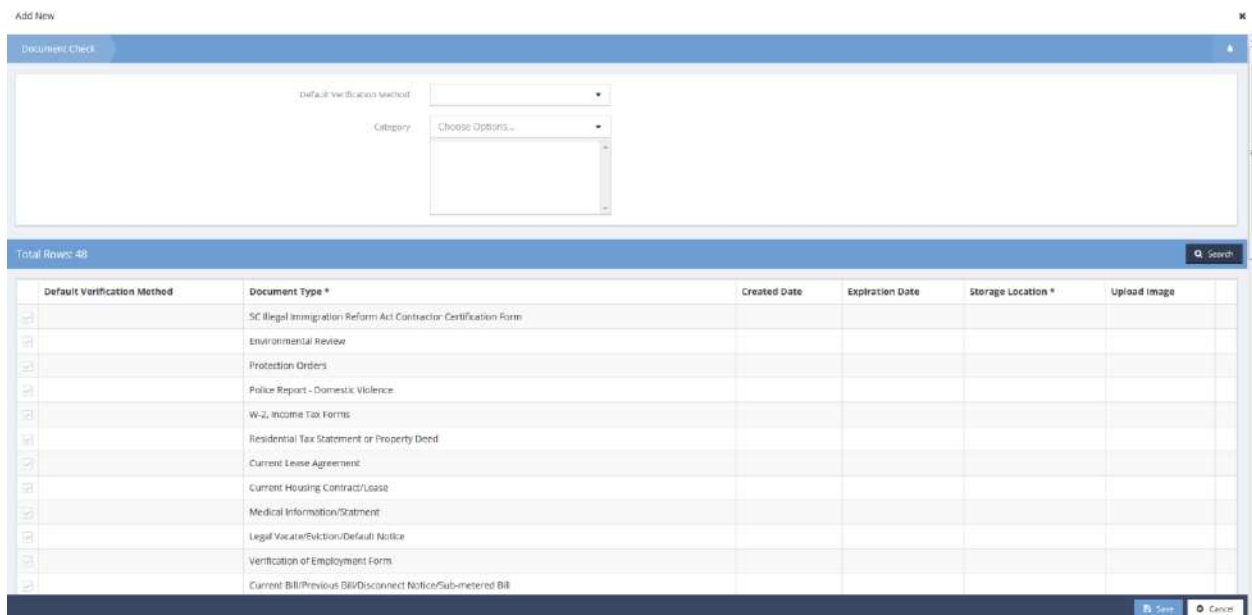
To add a new document, click the **+ Add New** button.



The screenshot shows the 'Document Check' interface. At the top right, there is a blue bar with a '+ Add New' button highlighted by a red rectangle. Below this bar is a 'Verification Method' dropdown menu. A status bar indicates 'Total Rows: 1'. Below the status bar is a table with the following data:

	Created Date	Storage Location	Document Type	Verification Method	Expiration Date	View File	File ID
+	3/17/2015	Electronic File	Test type	Scanned	3/24/2015	<a href="#">View File</a>	2053

The Add New form displays.



The screenshot shows the 'Add New' form in the 'Document Check' interface. The form has a title bar 'Add New' and a 'Document Check' header. It contains two dropdown menus: 'Default Verification Method' and 'Category'. Below the 'Category' dropdown is a list of options. A status bar indicates 'Total Rows: 48'. Below the status bar is a table with the following data:

	Default Verification Method	Document Type *	Created Date	Expiration Date	Storage Location *	Upload Image
+		SC Illegal Immigration Reform Act Contractor Certification Form				
+		Environmental Review				
+		Protection Orders				
+		Police Report - Domestic Violence				
+		W-2, Income Tax Forms				
+		Residential Tax Statement or Property Deed				
+		Current Lease Agreement				
+		Current Housing Contract/Lease				
+		Medical Information/Statement				
+		Legal Notice/Eviction/Default Notice				
+		Verification of Employment Form				
+		Current Bill/Previous Bill/Disconnected Notice/Sub-metered Bill				

At the bottom right of the form, there are 'Save' and 'Cancel' buttons.

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.

Default Verification Method: Copied

Category: Choose Options...

- Client
- Document Check Item
- Domestic Violence
- Education Certification
- Housing Contract
- Legal
- Non-Housing

Total Rows: 48

Search

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.

Default Verification Method: Copied

Category: Choose Options...

Client

Total Rows: 48

Search

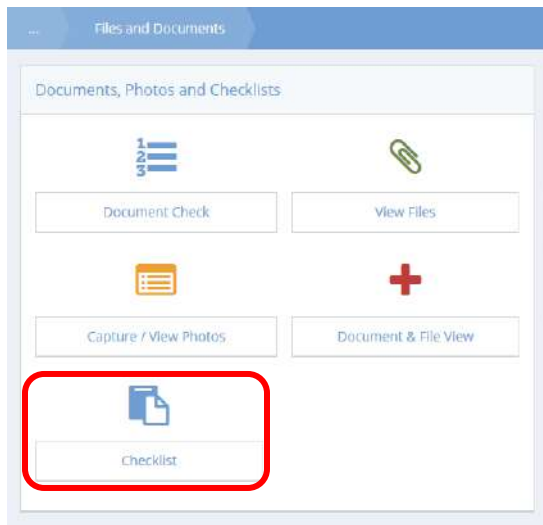
Default Verification Method	Document Type *	Created Date	Expiration Date	Storage Location *	Upload Image
<input checked="" type="checkbox"/> Copied	SC Illegal Immigration Reform Act Contractor Certification Forms	05/07/2015			<b>Browse</b>
<input checked="" type="checkbox"/>	Environmental Review				
<input checked="" type="checkbox"/>	Protection Orders				
<input checked="" type="checkbox"/>	Police Report - Domestic Violence				
<input checked="" type="checkbox"/>	W-2, Income Tax Forms				

Restrictions: Shared **View File**




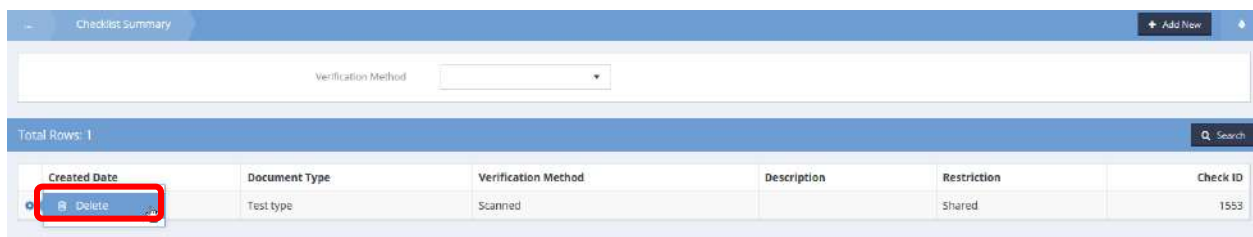
## Checklist (summary) - Clients

**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 screenshot shows the 'Checklist Summary' page. At the top right, there is a blue bar with a '+ Add New' button highlighted by a red rectangle. Below this bar is a 'Verification Method' dropdown menu. A blue bar below that indicates 'Total Rows: 1'. At the bottom, a table shows one row of data.

Created Date	Document Type	Verification Method	Description	Restriction	Check ID
3/17/2015	Test type	Scanned		Shared	1553

The Add New form displays.

The screenshot shows the 'Add New' form. It has a 'Enter Checklist' header and a 'Default Verification Method' dropdown. Below is a blue bar indicating 'Total Rows: 21'. A table lists document types, each with a checkbox in the first column. The first checkbox is highlighted with a red square.

Created Date	Document Type *	Description	Verification Method	Restriction
<input checked="" type="checkbox"/>	General Intake			
<input type="checkbox"/>	Care Note			
<input type="checkbox"/>	Create Initial Goal Plan			
<input type="checkbox"/>	Driver License			
<input type="checkbox"/>	Birth Certificate			
<input type="checkbox"/>	Quick Reference Sheet			
<input type="checkbox"/>	Orientation Checklist			
<input type="checkbox"/>	Application for Admission			

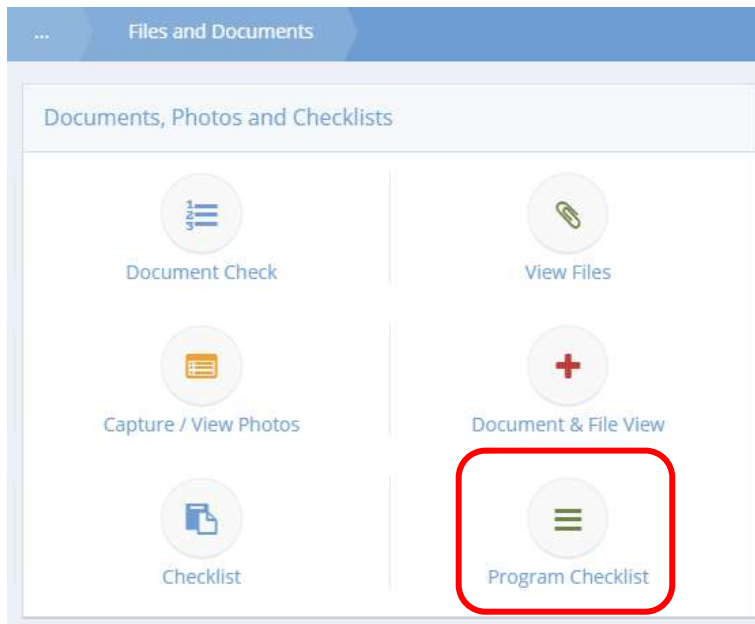
Select the desired document type by clicking on the clear checkbox ☒ icon associated with it. The row expands.

The screenshot shows the expanded row for 'General Intake'. It includes input fields for 'Created Date' (05/07/2015), 'Document Type' (General Intake), 'Description', 'Verification Method' (dropdown), and 'Restriction' (Shared).

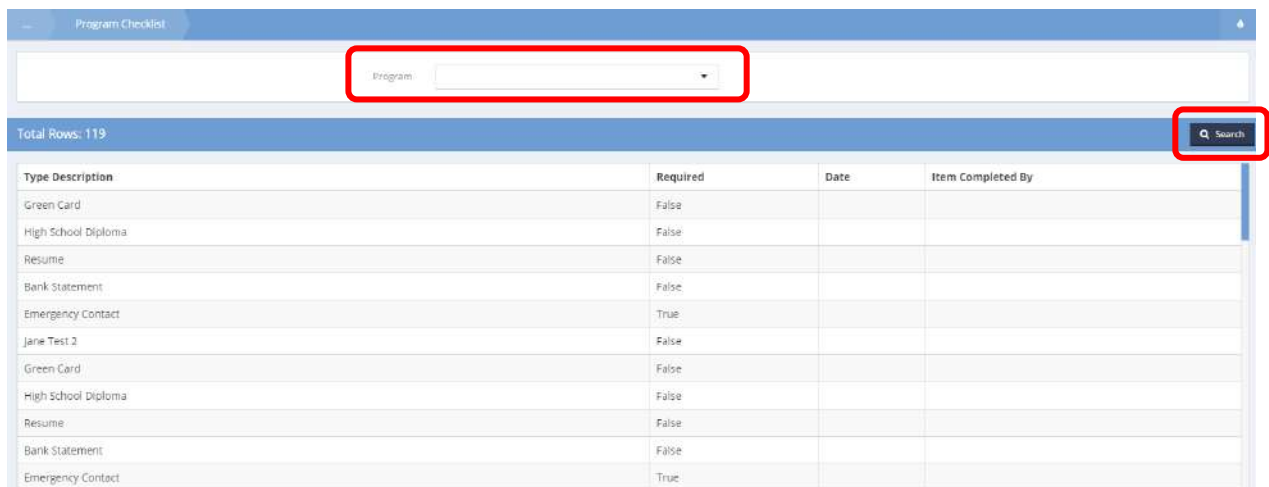
Enter a description. Click on the down arrow ▼ icon for verification method and select the desired value from the drop-down list that appears. Click on the down arrow ▼ icon for restriction and select the desired value from the drop-down list that appears. Click on the **Save** button.

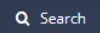
## Program Checklist

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

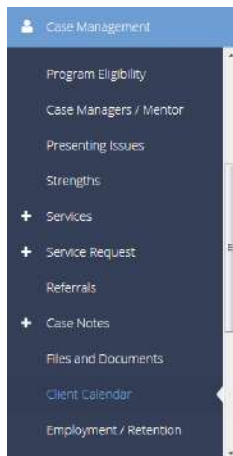


Click the icon for Program Checklist. The Program Checklist form displays.



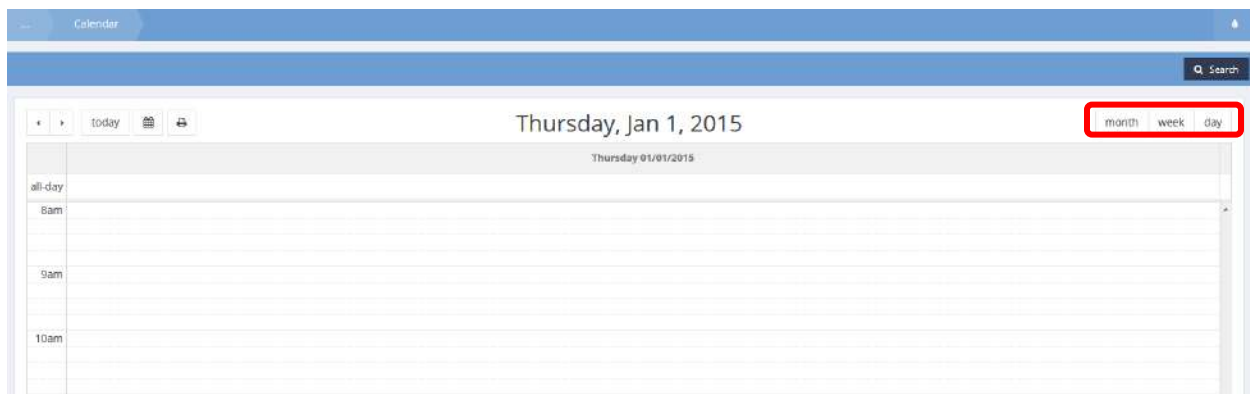
Use the program drop-down list and the  Search button to filter the list by program. Any relevant documents display with requirement status, submitted date and by whom it was completed.

## Client Calendar



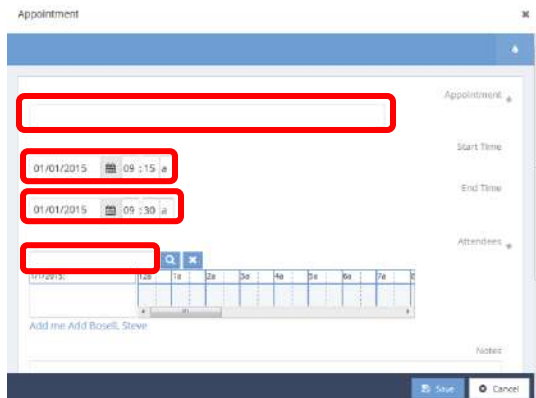
The next item in the Case Management menu group is the "Client Calendar." The client calendar allows a user to view and manage a client's appointments and follow-ups.

The calendar has day, week and month views.



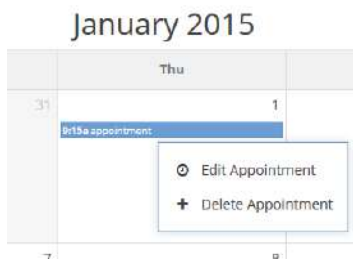
Simply click on the calendar to add a new appointment.

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.



The screenshot shows a pop-up window titled "Appointment". It contains several fields: a large text input field at the top, followed by "Start Time" and "End Time" fields, each with a date and time selector. Below these is an "Attendees" section with a search icon and a list of names. At the bottom, there are "Save" and "Cancel" buttons. Red boxes highlight the text input field, the "Start Time" and "End Time" fields, and the "Attendees" section.

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

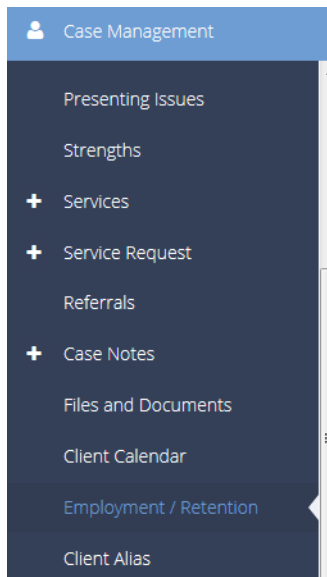
The Class, Housing and Event History dashboard displays.

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.

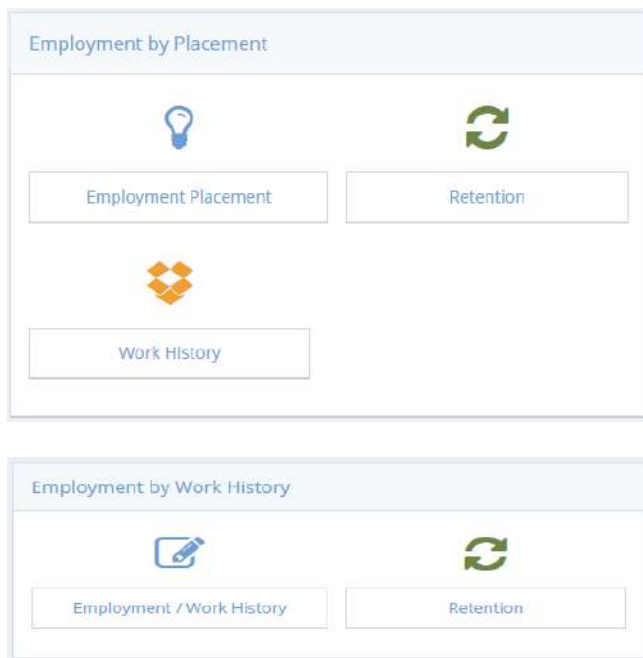
The Service Tardiness and Left Early Summary form displays.

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.

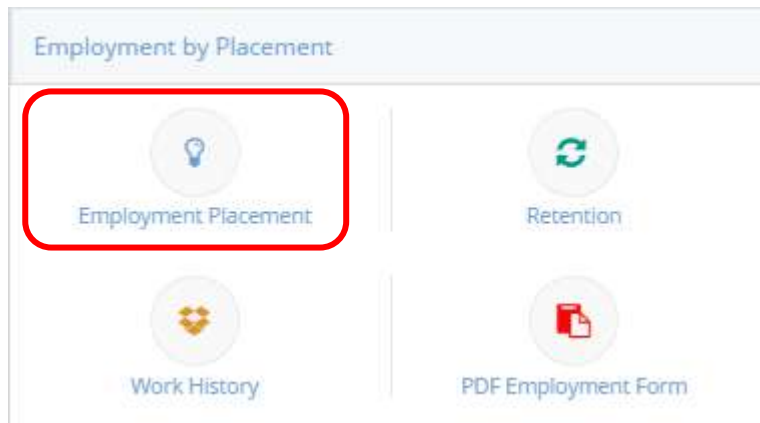


The "Employment by Work History" portion of the dashboard is used when tracking employment

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 **+ Add New** button in the top right corner.

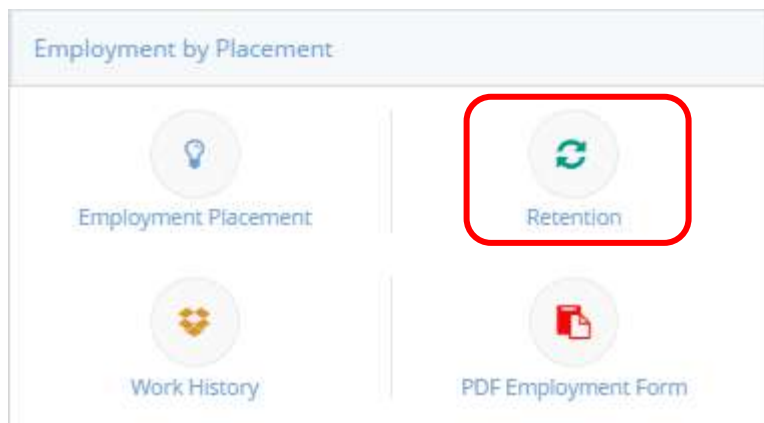


Select an existing assessment string, or create a new one. Select an employer from the list of providers, or create a new employer. Enter employment specific information, and income information. The form automatically totals salary information.

The screenshot displays a web form for CaseWorthy. At the top, a blue header bar contains the 'Assessment' dropdown menu, which is currently set to 'No assessment selected.' and is highlighted with a red box. Below this, the form is organized into several sections. The 'Placement Date' is set to 01/23/2015. The 'Verification Method' is a dropdown menu. The 'Placement Case Note' is a text area with a 'Case Note' button. The 'User Name' is 'aeliason'. The 'Placement Type' is a dropdown menu. The 'Other Associated Enrollments' is a dropdown menu with 'Choose Options...' selected. A section titled 'Select Follow-Up Type to post outcome or follow-up.' contains a 'Follow-Up Type' dropdown, 'Add Follow Up' and 'Post Outcome' buttons. The 'Employer Information' section includes an 'Employer' search field (highlighted with a red box), 'Address', 'City', 'Employer Contact' search field, 'Address 2', and 'State'. The 'Enter the Client's Job Information' section includes 'Work Begin Date', 'Job Title', 'SIC Description' search field, 'Job Order', 'Employment Type', and 'SIC Reference'. The 'Hourly / Salary Calculation Area' (highlighted with a red box) includes 'Hourly / Salary' dropdown (set to 'Hourly'), 'Payment Interval' dropdown (set to 'BiWeekly'), 'Calculated Hourly Pay Rate', and 'Avg Hours Worked Per Week'. The 'Wage and Weekly, Monthly, Annual Salary Details' (highlighted with a red box) section shows a table with columns for 'Yearly Total', 'Monthly Total', and 'Average Pay Per Pay Period', all currently set to '\$0'. The 'Pay Rate Per Hour' is also shown as '\$0'.

Yearly Total	Monthly Total	Average Pay Per Pay Period
\$0	\$0	\$0

## Retention



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

The screenshot shows the "Add Employment Retention" form. At the top right, there is a blue button labeled "+ Add New" highlighted with a red box. Below this is a table with one row of data. The table has columns: Program, Follow-up Date / Type, Employer, Case Note, and View Placement. The first row contains: Sample prog (HIV), 1/23/2015 /, CaseWorthy, and a "View Placement" button highlighted with a red box. Below the table is the "Add Employment Retention" form. The form has several fields: "Employment Placement" (CaseWorthy), "Retention Assessment Date" (01/23/2015), "Placement Date" (01/23/2015), "Follow-Up Type" (dropdown menu highlighted with a red box), "Verification Method" (dropdown menu highlighted with a red box), "Verifying Person" (text input field highlighted with a red box), "Are You Still Working" (checkbox), "Edit/Add New Work History" (CaseWorthy), "Supervisor" (text input field), "Case Note" (button), "Next Follow Up Type" (dropdown menu), "Post Follow Up" (checkbox), and "Post Outcome" (checkbox).

Program	Follow-up Date / Type	Employer	Case Note	View Placement
Sample prog (HIV)	1/23/2015 /	CaseWorthy		<a href="#">View Placement</a>

**Add Employment Retention**

Employment Placement: CaseWorthy

Retention Assessment Date: 01/23/2015

Placement Date: 01/23/2015

Follow-Up Type: [dropdown menu]

Verification Method: [dropdown menu]

Verifying Person: [text input field]

Are You Still Working: [checkbox]

Edit/Add New Work History: CaseWorthy

Supervisor: [text input field]

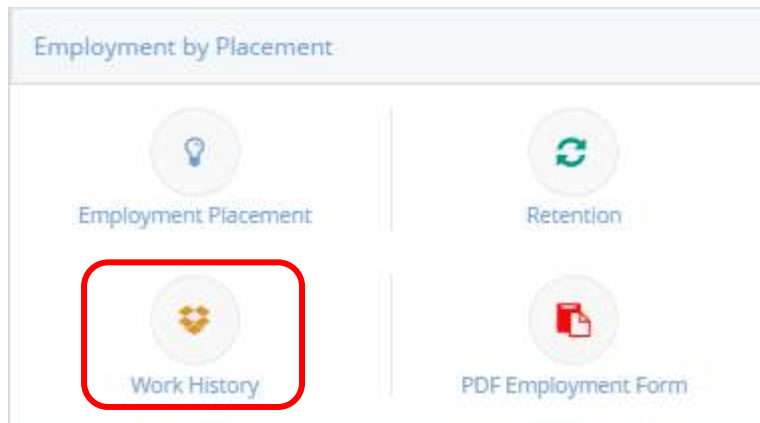
Case Note: [button]


Next Follow Up Type: [dropdown menu]

Post Follow Up: [checkbox]


Post Outcome: [checkbox]

## Work History



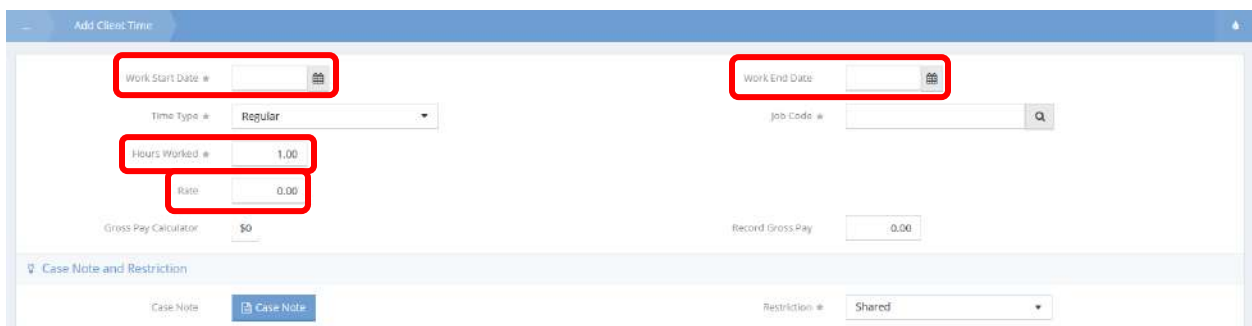
Clicking the "Work History" icon opens the work history summary form. Click the action gear  to link to the placement summary form or track the client's work time.

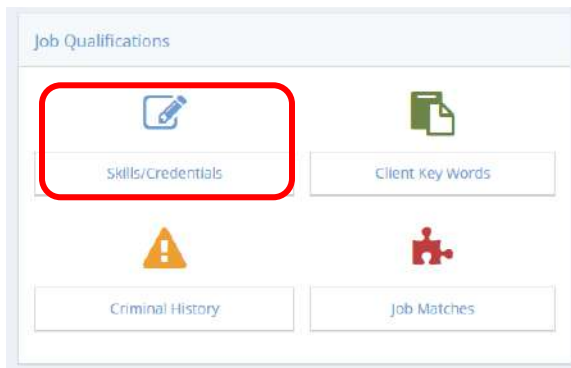


From the Client Work Time Summary form, click **+ Add New** to enter a client's time or click the action gear  and click Edit to edit an existing entered time.



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 **+ Add New** button in the top right corner.

Credentials and Skills Summary			
Total Rows: 1			
Credential	Skill	Description	Case Note
Bachelor's Degree	Ability to Motivate and Assist		

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.

Credentials and Skills
 + Add New Skill Types
+ Add Row

Credential *	Skill Type *	Description	Case Note ID
<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="button" value="Case Note"/>

Begin Date: 01/23/2015    End Date: 01/23/2015 ★  
 Issuing Institution:     Issued Date:   
 Attach a file: No

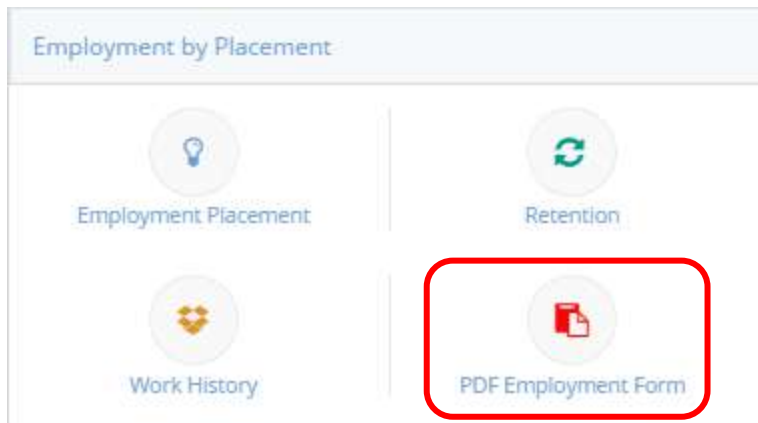
Select Skill and Credential Types Lookup

Credential Category:

Total Rows: 107

Credential Type	Skills	Credential Category
Skill	Ability to Motivate and Assist	Soft Skill
Bachelor's Degree	Ability to Motivate and Assist	Education
Work Experience	Able to lift up to 40 lbs	Work History
Skill	Able to lift up to 40 lbs	Soft Skill

## 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)

Employment PDF

PDF Export

Last Name	test	First Name	test	Middle		Birth Date	
Age							
SSN							
Male	NO	Phone 1					
Female	NO	Phone 2					
Address		Apt. Number					
City		State		Zip Code			
Email							

Ethnicity/Race

Hispanic	NO	Hawaiian Native or Other Pacific Islander	NO	White	NO	Asian	NO
American Indian or Alaska Native	NO	Black or African American	NO				
More Than One Race	NO						
Primary Language	English						

Disability

No Disability	YES		
Yes disability, not a barrier to employment	NO	Yes Disability, It is a barrier to employment	NO

Transportation

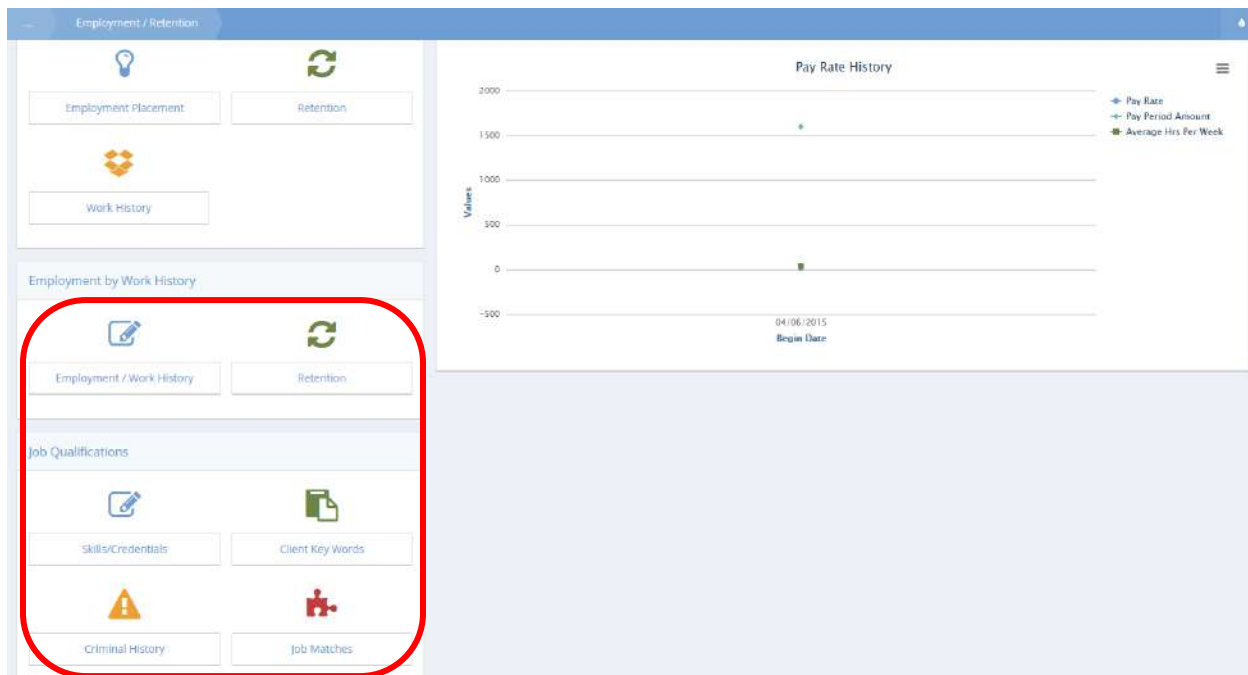
Valid Driver's License Yes	NO	Valid driver's license no	NO
Own Vehicle Yes	NO	Own vehicle no	NO

✓ Done

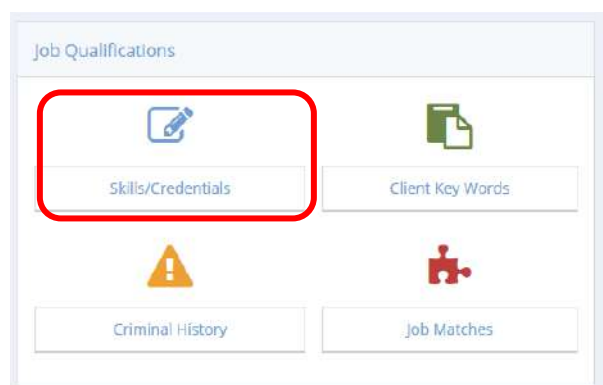
This form is simply a view only version of Employment information. Click the [PDF Export](#) button to save as a PDF.

## Job Match

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

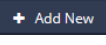


### *Client Skills and Credentials*




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  button. A new, expanded row appears on the form.

### Credentials and Skills (New)

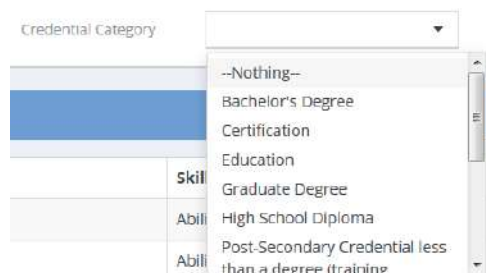
Click on the magnifying glass  icon. The Credential Lookup form opens.

### Select Skill and Credential Types Lookup

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




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.

A screenshot of the 'Credentials and Skills' form in a web application. The form has a header bar with two buttons: 'Add New Skill Types' and 'Add Row', both highlighted with red rectangles. Below the header, there are several input fields: 'Credential \*' (with a search icon), 'Skill Type \*' (with a search icon), 'Description', and 'Case Note ID'. There are also date pickers for 'Begin Date' and 'End Date', both set to '05/07/2015'. Other fields include 'Issuing Institution', 'Issued Date', and 'Expiration Date'. At the bottom, there is an 'Attach a file' dropdown menu set to 'No'. A 'Save' button is located at the bottom right of the form.


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.

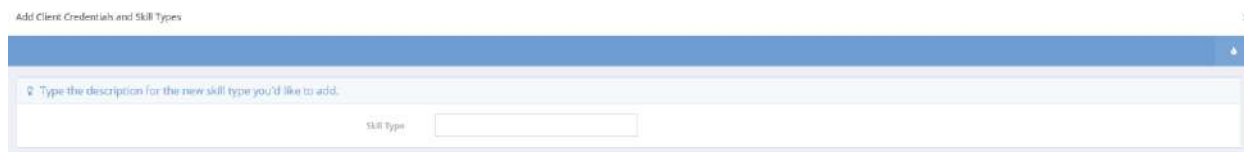
To add a *new* skill or credential to the database list, click on the  Add New Skill Types button. The Add New Skill Types form displays.


## Add New Skill Types

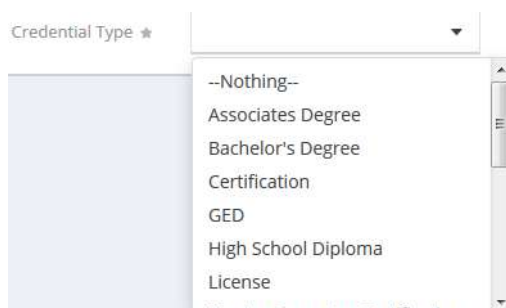




Start typing in the Skill Type field to find a skill already in the database. If the skill being searched for does not appear in the drop-down, click on the plus sign  to add it to the inventory. The Add Client Credentials and Skill Types form displays.

## 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.


Credentials and Skills Summary			
Total Rows: 1			
Credential	Skill	Description	Case Note
 Skill	Ability to Motivate and Assist		

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.

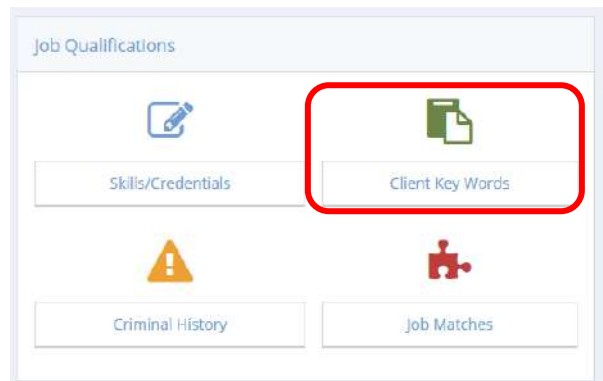
Credentials and Skills Summary			
Total Rows: 1			
  Edit	skill	Description	Case Note
 Delete	Ability to Motivate and Assist		

### *Credentials And Skills Client (Edit)*

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

Make any desired changes and click 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 form 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.

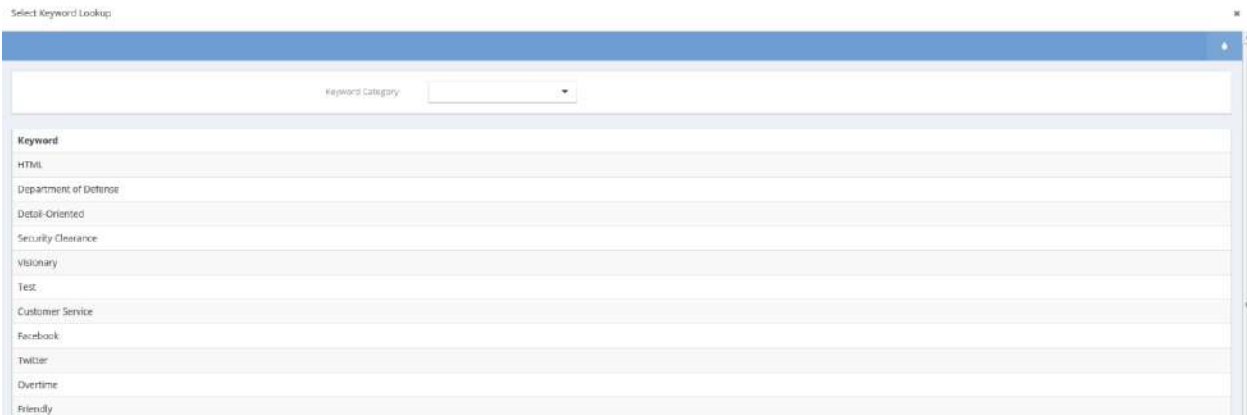
A new, expanded row appears on the form.



The screenshot shows the 'Client Keywords Spreadsheet' form. At the top, there is a blue header bar with the title 'Client Keywords Spreadsheet' and an 'Add Row' button. Below the header, a status bar indicates 'Total Rows: 0'. The main form area contains two columns: 'Keyword' and 'Rank Order'. The 'Keyword' column has a checkbox and a text input field. A red square highlights a magnifying glass icon next to the text input field. The 'Rank Order' column has a dropdown menu.

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*




The screenshot shows the 'Select Keyword Lookup' form. It has a blue header bar with the title 'Select Keyword Lookup'. Below the header, there is a 'Keyword Category' dropdown menu. The main area is a table with the following keywords listed:


Keyword
HTML
Department of Defense
Detail-Oriented
Security Clearance
Visionary
Test
Customer Service
Facebook
Twitter
Overtime
Friendly

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.



The screenshot shows the 'Client Keywords Spreadsheet' form after the keyword lookup. The 'Keyword' column now displays 'HTML' and the 'Rank Order' column has a dropdown menu. The 'Add Row' button is still present at the top right.

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.





Keyword	Rank Order
HTML	

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*




Keyword	Rank Order
---------	------------

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.




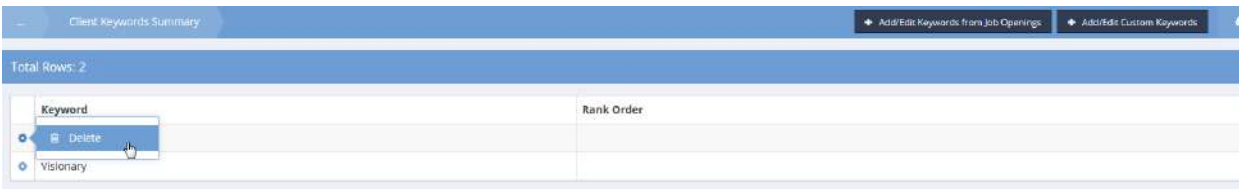
Keyword	Rank Order
<input checked="" type="checkbox"/>	

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.



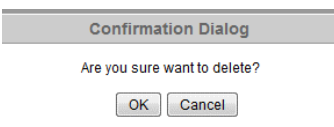
Keyword	Rank Order
HTML	
Visionary	

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



Keyword	Rank Order
Visionary	

Click on OK in the Confirmation Dialog box that displays.

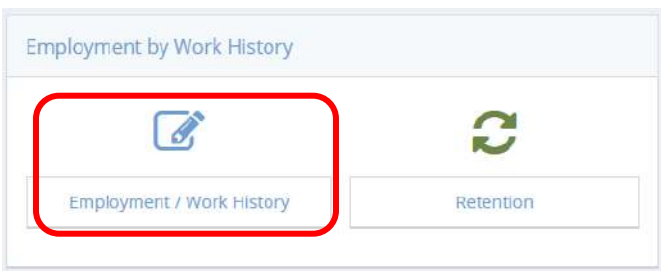


**Confirmation Dialog**

Are you sure want to delete?

OK Cancel

### *Employment / Work History*




**Employment by Work History**

Employment / Work History Retention

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



Employer Name / Job Title	Begin - End Dates	Employment Type	Pay Type	Health Benefits	Pay Rate	Monthly Amount
CaseWorthy / job	5/7/2015 - Present	Full Time	Hourly	No	\$0.00	\$0.00


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

Begin - End Dates	Employment Type	Pay Type	Health Benefits	Pay Rate	Monthly Amount
5/7/2015 - Present	Full Time	Hourly	No	\$0.00	\$0.00

The Credentials and Skills form displays.

### *Work Experience (Add New)*

Skill Type *	Description	Case Note ID
--------------	-------------	--------------

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

Skill Type *	Description	Case Note ID
		

Begin Date \* 05/07/2015      End Date \*

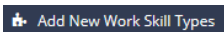
Month Experience NaN



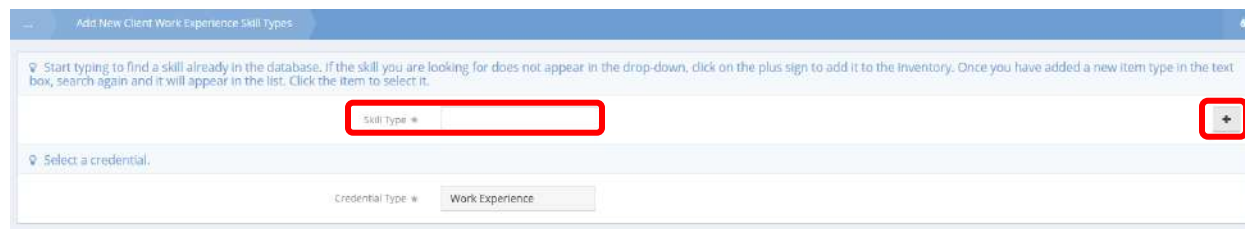
*Skill & Credential Work Experience (Select)*

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 Teachers Association
Work Experience	Barista
Work Experience	Line Cook
Work Experience	Stocking Shelves
Work Experience	Customer Service
Work Experience	Hunting License

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

## Add New Client Work Experience Skill Types



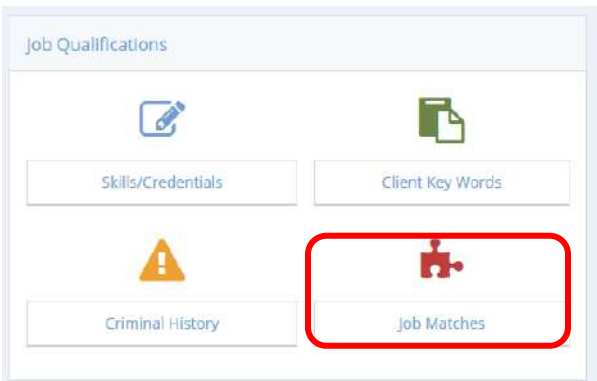
Start typing in the Skill Type field to find a skill already in the database. If the skill does not appear in the drop-down, click on the plus sign **+** to add it to the inventory.



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

Job Match Summary for Client

Print Selected

Print All

Client Status

Employer Status

Total Rows: 18

Search

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

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.

Job Match Summary for Client

Print Selected Print All Client Status: Pending Review Employer Status: Pending Review

Total Rows: 18

Description	Match Quality	No Match Reason	Client Status	Employer	Title	# of Positions	Posting URL	Employer Status	Close Date	Starting Salary	Qualifications
<input type="checkbox"/> Contact Employer <input checked="" type="checkbox"/> Update Client Status			Pending Review	Auto Zone	Assistant Manager	1	<a href="#">Link</a>	Pending Review	12/1/2015 12:00:00 AM	\$35,000.00	<a href="#">Gr</a>
<input type="checkbox"/> No Match	No Match		Pending Review	Auto Zone	Assistant Manager	1	<a href="#">Link</a>	Pending Review	12/1/2015 12:00:00 AM	\$35,000.00	<a href="#">Gr</a>

### Update Client Status - Job Match Edit

Edit Job Match Client Status Update

Job Match Information

Employer: Auto Zone Job Title: Assistant Manager

Employer Status: Pending Review Close Date: 12/01/2015

Update Status

Client Status: Pending Review

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.

Job Match Summary for Client

Print Selected Print All Client Status: Employer Status:

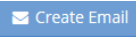
Total Rows: 18


Description	Match Quality Level	No Match Reason	Client Status	Employer	Title	# of Positions	Posting URL	Employer Status	Close Date	Starting Salary	Qualifications
<input type="checkbox"/> Contact Employer <input checked="" type="checkbox"/> Update Client Status	No Match		Pending Review	Auto Zone	Assistant Manager	1	<a href="#">Link</a>	Pending Review	12/1/2015 12:00:00 AM	\$35,000.00	<a href="#">Gr</a>
<input type="checkbox"/> No Match	No Match		Pending Review	Auto Zone	Assistant Manager	1	<a href="#">Link</a>	Pending Review	12/1/2015 12:00:00 AM	\$35,000.00	<a href="#">Gr</a>
<input type="checkbox"/> No Match	No Match		Pending Review	Auto Zone	Assistant Manager	1	<a href="#">Link</a>	Pending Review	12/1/2015 12:00:00 AM	\$35,000.00	<a href="#">Gr</a>
<input type="checkbox"/> No Match	No Match		Pending Review	Burger King	Cashier	1	<a href="#">Link</a>	Pending Review	7/1/2015 12:00:00 AM	\$9.00	<a href="#">Gr</a>

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.

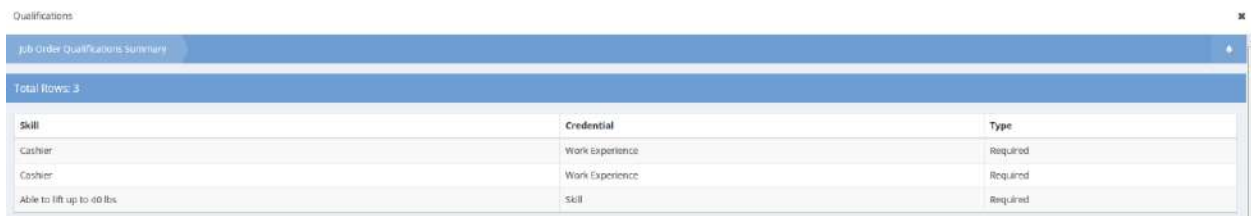
### Contact Job Match Employer




If the information is correct, click on the  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



Skill	Credential	Type
Cashier	Work Experience	Required
Cashier	Work Experience	Required
Able to lift up to 60 lbs	Skill	Required

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 Transportation 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.

Client Alias Summary			
Total Rows: 1			
Alias	Restriction	Created Date	Alias ID
Steven	Shared	3/31/2015 6:13 AM	1332

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

Client Alias

The client alias is used during the "Check for Duplicates" feature when adding a client and in the "Find Client" feature. The alias entered is stored in the database as an alternative first name of the client.

Alias \*

Restriction Information - Share the Alias Information?

Restriction \*

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

Client Alias

The client alias is used during the "Check for Duplicates" feature when adding a client and in the "Find Client" feature. The alias entered is stored in the database as an alternative first name of the client.

Alias \*

Restriction Information - Share the Alias Information?

Restriction \*

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

Client Alias Summary			
Total Rows: 2			
Alias	Restriction	Created Date	Alias ID
Paul	Shared	3/31/2015 6:16 AM	1333
Steven	Shared	3/31/2015 6:13 AM	1332

## Find Service by Client Latitude and Longitude

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

**Client Service w Address**

QA Test

**Identifying**

Last Name \*

First Name \*

Birth Date \*  Full

SSN \*  Full

Gender \*

Age  NaN

Deceased Date

Citizenship Status

Relation to HOH \*  Self

Race \*  Choose Options...

Primary Language \*  English

Ethnicity \*

[Check For Duplicates](#)

**Address Information**

Address Type  Current Address

Address \*

Zip Code \*

City

Country \*  United States of America

Apartment Number

County

State

[Save](#) [Cancel](#)

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

Enter all required info and click [Save](#) to proceed to the next step.

**Add Client**

QA Test

**Identifying**

Last Name \*

First Name \*

Birth Date \*  Full

SSN \*  Full

Gender \*

Age  NaN

Deceased Date

Citizenship Status

Relation to HOH \*  Self

Race \*  Choose Options...

Primary Language \*  English

Ethnicity \*

[Check For Duplicates](#)

**Address Information**

Address Type  Current Address

Address \*

Zip Code \*

City

Country \*  United States of America

Apartment Number

County

State

[Save](#) [Cancel](#)



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

Service By Address

Service: Choose Options...

Search

Client	Program	Service	Address, City	Longitude	Latitude	Begin Date	Total
Bosell, Steve	Common Intake	AA Meeting	111 notastreet, Salt Lake City	-111.79	40.67	4/16/2015	\$0.00
Bosell, Steve	12 Permanent Housing for Homeless Disabled	AA Meeting	111 notastreet, Salt Lake City	-111.79	40.67	4/16/2015	\$0.00
Bosell, Steve	12 Permanent Housing for Homeless Disabled	Administrative Time	111 notastreet, Salt Lake City	-111.79	40.67	4/16/2015	\$1.00
Bosell, Steve	12 Permanent Housing for Homeless Disabled	Adoption Registry	111 notastreet, Salt Lake City	-111.79	40.67	4/16/2015	\$1.00
Bosell, Steve	12 Permanent Housing for Homeless Disabled	Bus Tokens	111 notastreet, Salt Lake City	-111.79	40.67	4/16/2015	\$1.00
Bosell, Steve	12 Permanent Housing for Homeless Disabled	AA Meeting	111 notastreet, Salt Lake City	-111.79	40.67	4/16/2015	\$0.00

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

Click **Done** when finished viewing services.

Service By Address

Service: Choose Options...

Search

☒ AA Meeting  
☒ Abstinence Education  
☒ ADC  
☒ Administrative Time  
☒ Adoption Registry  
☒ Adoption Support Group  
☒ Adult Counseling Service

Add Selected Cancel

Client	Program	Service	Address, City	Longitude	Latitude	Begin Date	Total
Bosell, Steve	Common Intake	AA Meeting	111 notastreet, Salt Lake City	-111.79	40.67	4/16/2015	\$0.00
Bosell, Steve	12 Permanent Housing for Homeless Disabled	AA Meeting	111 notastreet, Salt Lake City	-111.79	40.67	4/16/2015	\$0.00
Bosell, Steve	12 Permanent Housing for Homeless Disabled	Administrative Time	111 notastreet, Salt Lake City	-111.79	40.67	4/16/2015	\$1.00
Bosell, Steve	12 Permanent Housing for Homeless Disabled	Adoption Registry	111 notastreet, Salt Lake City	-111.79	40.67	4/16/2015	\$1.00

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.

Add Family Members **+ Add Row**

**Search**

First Name *	Last Name *	Dupe Check *	Birth Date *	Age	Gender *	SSN *
<input type="checkbox"/>	<input type="text"/>	<input type="button" value="Check For Duplicates"/>	<input type="text"/> Full		<input type="text"/>	<input type="text"/> Full
Ethnicity * <input type="text"/>		Citizenship Status <input type="text"/>		Primary * Language <input type="text"/> English		
Relation to * HOH <input type="text"/>		Race * Choose Options... <input type="text"/>				
Sharing * <input type="text"/>		<input type="button" value="Address"/>		Address <input type="text"/>		
<input checked="" type="checkbox"/>	Steve	Bosell	1/22/1969	46	Male	222-22-2222
<input checked="" type="checkbox"/>	April	Bosell	4/19/1970	45	Female	123-44-5678
<input checked="" type="checkbox"/>	Steven Jr.	Bosell	5/22/2000	14	Male	111-11-1111
<input checked="" type="checkbox"/>	April Jr.	Bosell	4/17/2004	11	Female	111-11-1117
<input checked="" type="checkbox"/>	test	childSteve	4/8/2008	7	Male	894-94-6496

The Enrollment Add/Edit form displays next.

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

Enrollment Add/Edit

Family Name:

Program Entry Date:

Program:

Program Exit Date:

Provider:



Enroll current client: ☒

Assign Case Manager: ☐

Schedule Follow Up: ☒

**Restriction Information**

Restriction:

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  when finished.

Enrollment Members


Member enrollment dates must either fall between or be equal to the enrollment begin and end dates for the HoH.

Choose the family members you want to include in this enrollment from the list below.

Client	Provider *	Restriction *	Begin Date *	End Date
<input checked="" type="checkbox"/> Bosell, Steve	CaseWorthy	Shared	05/05/2015	Present

Enrollment Begin Date: 05/05/2015 Enrollment End Date: 12/31/9999
















<input checked="" type="checkbox"/> Bosell, April				
<input checked="" type="checkbox"/> Bosell, Steven Jr.				
<input checked="" type="checkbox"/> Bosell, April Jr.				
<input checked="" type="checkbox"/> childSteve, test				

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.


Suggested Reservation

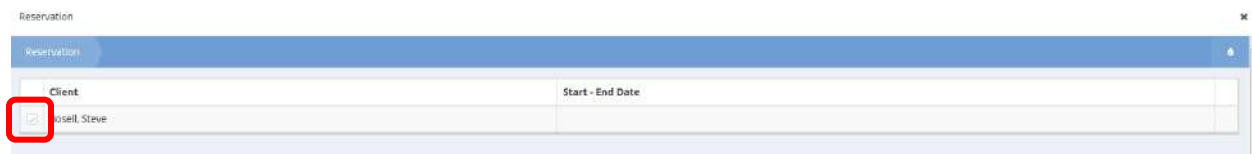
Category:  Resource:


Total Rows: 38

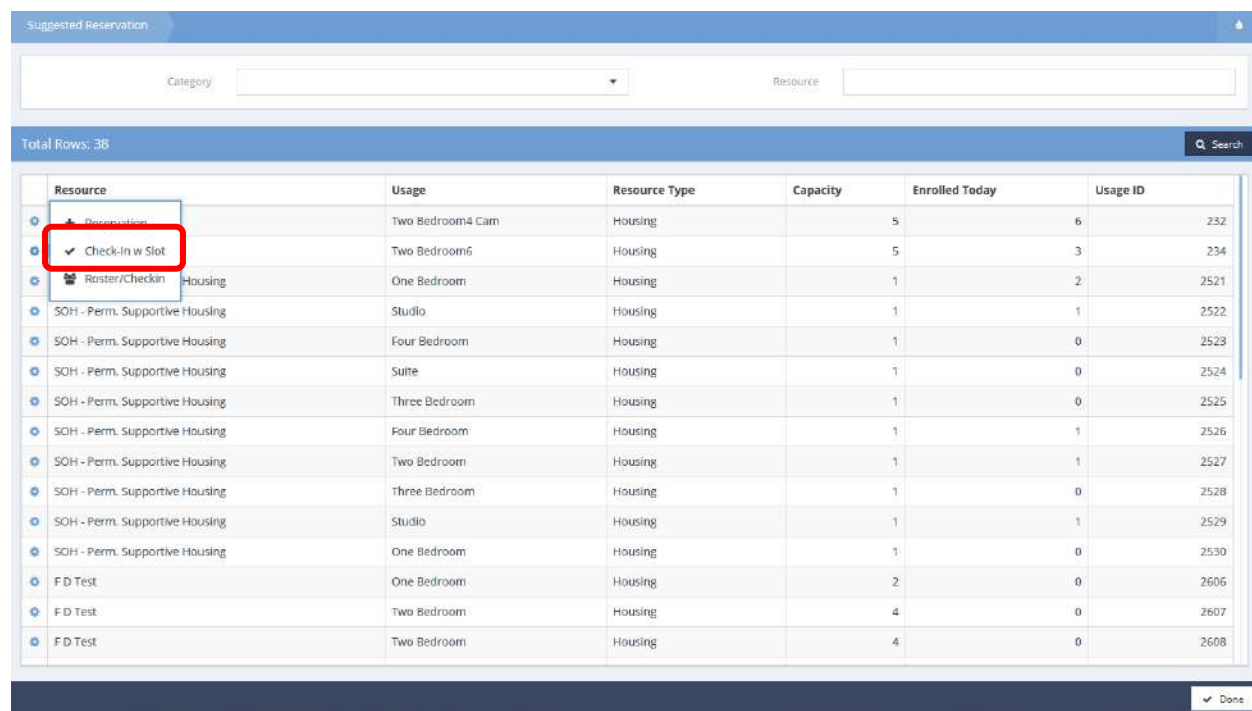
Resource	Usage	Resource Type	Capacity	Enrolled Today	Usage ID
 Reservation	Two Bedroom4 Cam	Housing	5	6	232
 Check-in w Slot	Two Bedroom6	Housing	5	3	234
 Roster/Checkin	One Bedroom	Housing	1	2	2521
 SOH - Perm. Supportive Housing	Studio	Housing	1	1	2522
 SOH - Perm. Supportive Housing	Four Bedroom	Housing	1	0	2523
 SOH - Perm. Supportive Housing	Suite	Housing	1	0	2524
 SOH - Perm. Supportive Housing	Three Bedroom	Housing	1	0	2525
 SOH - Perm. Supportive Housing	Four Bedroom	Housing	1	1	2526
 SOH - Perm. Supportive Housing	Two Bedroom	Housing	1	1	2527
 SOH - Perm. Supportive Housing	Three Bedroom	Housing	1	0	2528
 SOH - Perm. Supportive Housing	Studio	Housing	1	1	2529
 SOH - Perm. Supportive Housing	One Bedroom	Housing	1	0	2530
 F D Test	One Bedroom	Housing	2	0	2606
 F D Test	Two Bedroom	Housing	4	0	2607
 F D Test	Two Bedroom	Housing	4	0	2608


Done


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




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



Resource	Usage	Resource Type	Capacity	Enrolled Today	Usage ID
Reservation	Two Bedroom4 Cam	Housing	5	6	232
<input checked="" type="checkbox"/> Check-In w Slot	Two Bedroom6	Housing	5	3	234
 Roster/Checkin	One Bedroom	Housing	1	2	2521
SOH - Perm. Supportive Housing	Studio	Housing	1	1	2522
SOH - Perm. Supportive Housing	Four Bedroom	Housing	1	0	2523
SOH - Perm. Supportive Housing	Suite	Housing	1	0	2524
SOH - Perm. Supportive Housing	Three Bedroom	Housing	1	0	2525
SOH - Perm. Supportive Housing	Four Bedroom	Housing	1	1	2526
SOH - Perm. Supportive Housing	Two Bedroom	Housing	1	1	2527
SOH - Perm. Supportive Housing	Three Bedroom	Housing	1	0	2528
SOH - Perm. Supportive Housing	Studio	Housing	1	1	2529
SOH - Perm. Supportive Housing	One Bedroom	Housing	1	0	2530
F D Test	One Bedroom	Housing	2	0	2606
F D Test	Two Bedroom	Housing	4	0	2607
F D Test	Two Bedroom	Housing	4	0	2608

After selecting the date, click the  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  button.

The Check-in with Slot form displays.

Check-in w Slot

Date \* 05/01/2015

Event \*  
Date 05/01/2015 Time All day

Event Summary

Min	Max	Reserved	Checked in
0	5	3	0

Search

Client	Slot	Start Date	End Date
<input type="checkbox"/> Baker, Mark			
<input checked="" type="checkbox"/> Jane, Jane213	N/A	05/01/2015	05/31/2015
<input type="checkbox"/> End Reservation			
<input type="checkbox"/> Anton, John			

When finished with reservations, click the ☒ Done button.


## Actions Taken

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

Action - Issues								
Total Rows: 35								
	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.

Action - Issues								
Total Rows: 35								
	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	

Click  to confirm. The action is now deleted.

**Confirmation Dialog**

Are you sure want to delete?

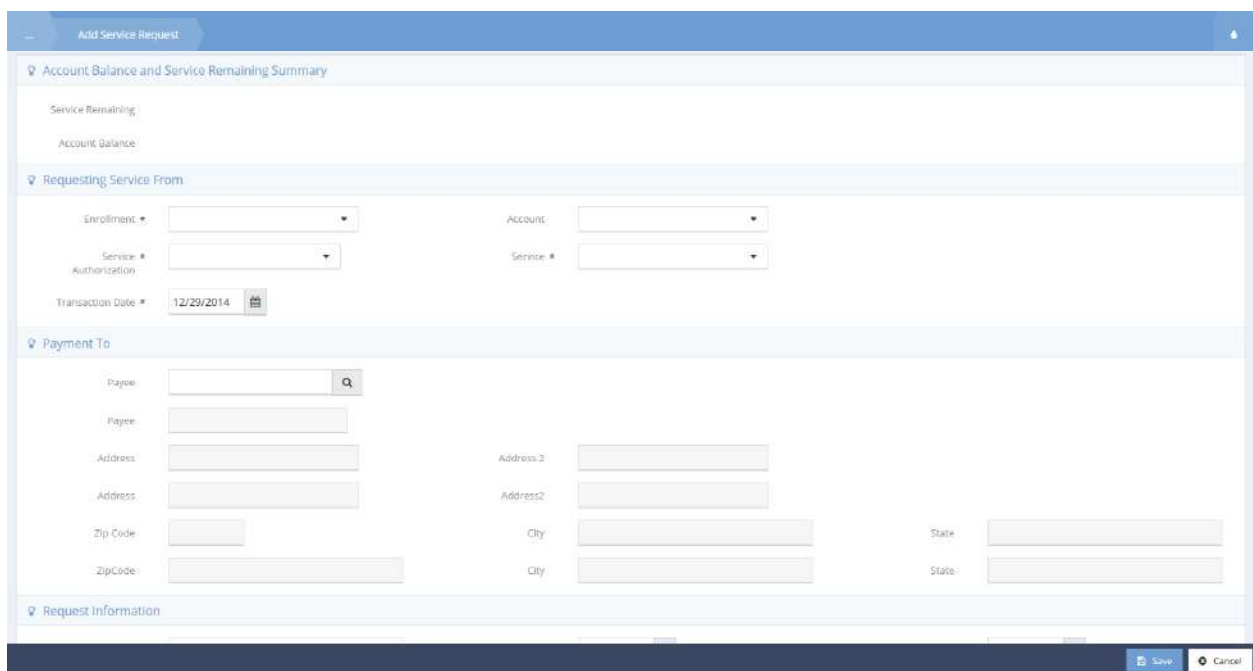
## Authorization Service Request Summary

**Objective:** Create a new service request.



The screenshot shows the 'Service Request Summary' form. At the top right, there are two buttons: '+ Add Service' (highlighted with a red box) and '+ Account Service'. Below these buttons is a table with the following columns: Date, To Provider, Service, Status, Amount, Payment, and ID. The table is currently empty.

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



The screenshot shows the 'Add Service Request' form. It is divided into several sections:

- Account Balance and Service Remaining Summary:** Contains 'Service Remaining' and 'Account Balance' fields.
- Requesting Service From:** Contains dropdown menus for 'Enrollment', 'Service', 'Account', and 'Service', and a 'Transaction Date' field with a calendar icon.
- Payment To:** Contains a search bar for 'Payee', and fields for 'Payee', 'Address', 'Address2', 'Zip Code', 'ZipCode', 'City', and 'State'.
- Request Information:** A section at the bottom with a 'Save' button and a 'Cancel' button.

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.

Entity Name History			
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

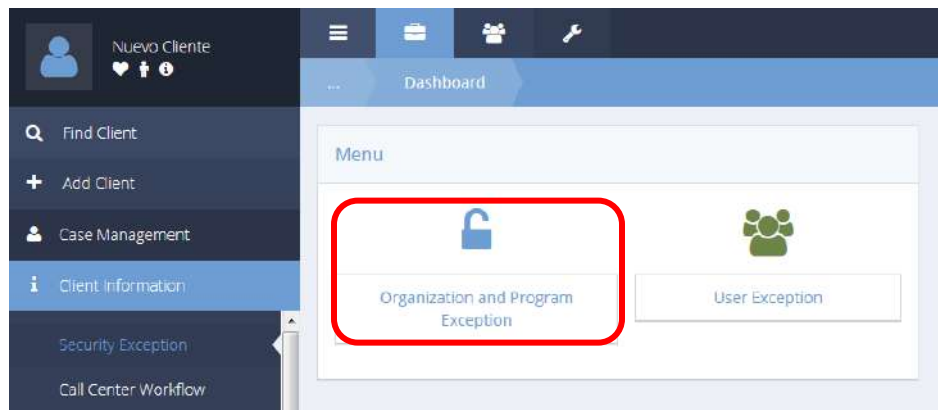
This is a view only form. (Name changes are recorded on the Add Client Demographics form.)



## Client Information

### Security Exception

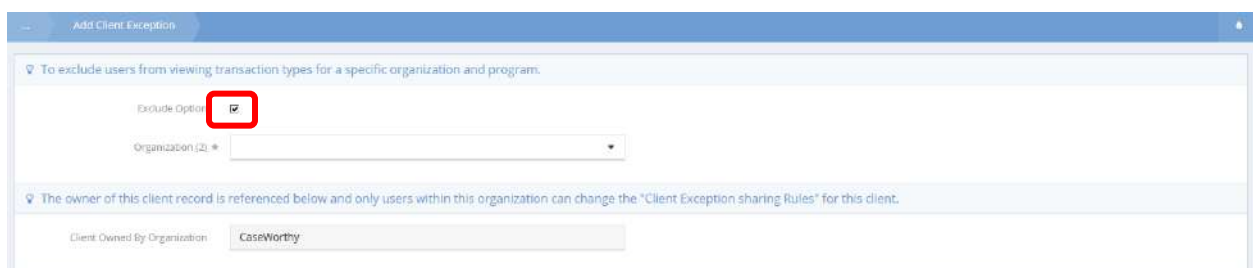
**Objective:** Control how client information is shared across organizations.



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



To add a new security exception, click on the **+ Add New** 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.

Client Exception Summary


Add New

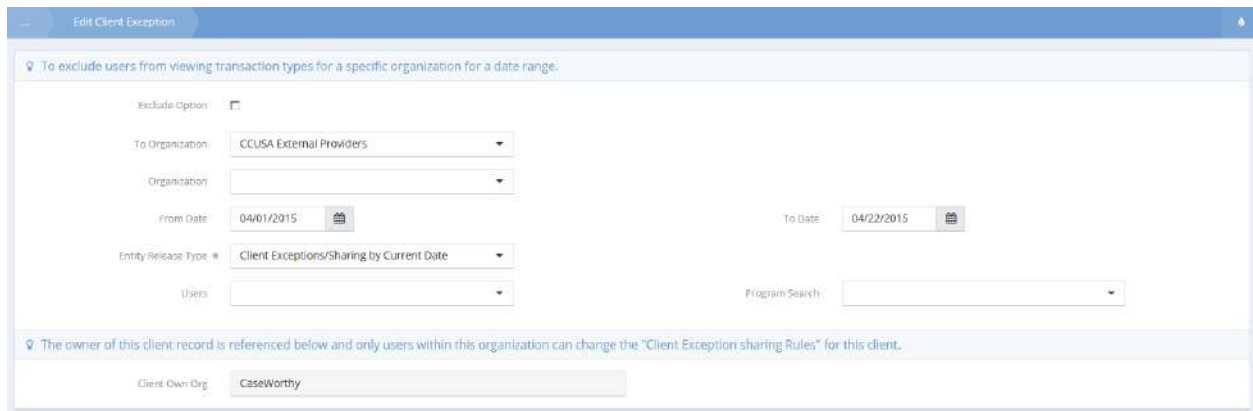
Total Rows: 1

Edit

Delete

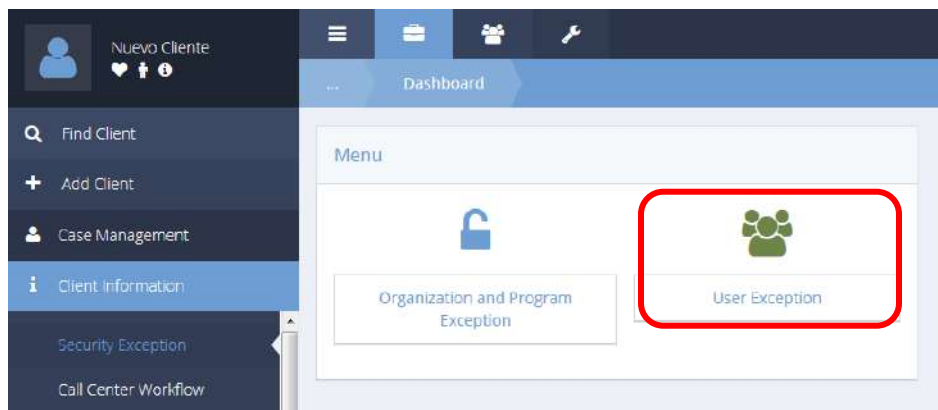
Exclude/Include	Begin Date	End Date	Transaction Type	Description	Release ID
Include	4/1/2015	4/22/2015			183

Make any required changes and click on the  **Save** button.



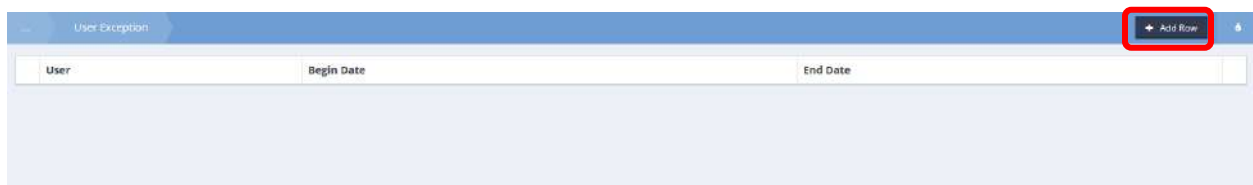
## User Exception

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

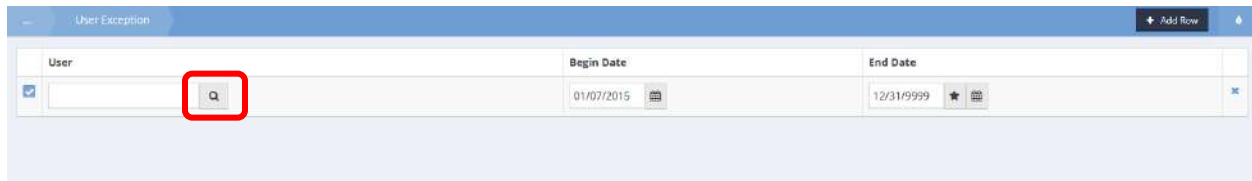


Click the User Exception icon. The User Exception form displays.

Click  **Add Row** to create a new exception.

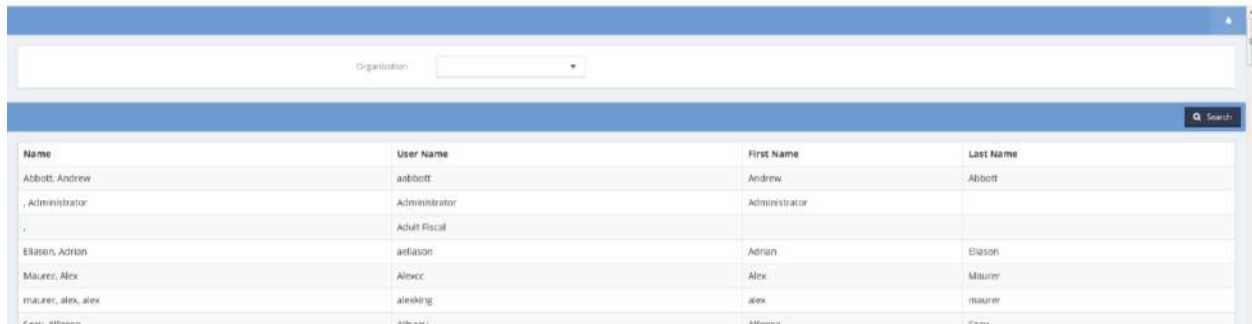


Specify a begin date and end date and click the magnifying glass  icon to select a user from a list.



The screenshot shows the 'User Exception' form. The 'User' field has a magnifying glass icon highlighted with a red box. The 'Begin Date' is set to 01/07/2015 and the 'End Date' is set to 12/31/9999.

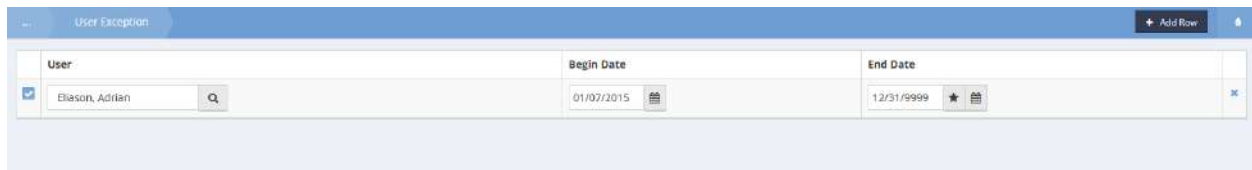
The Select User form displays in a new window.



The screenshot shows the 'Select User' form. It displays a list of users with columns for Name, User Name, First Name, and Last Name.

Name	User Name	First Name	Last Name
Abbott, Andrew	aabbott	Andrew	Abbott
Administrator	Administrator	Administrator	
Adult Fiscal	Adult Fiscal		
Elison, Adrian	aelison	Adrian	Elison
Maurer, Alex	Alexcc	Alex	Maurer
maurer, alex, alex	alexking	alex	maurer
Kaiser, Althron	althron	Althron	Kaiser

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

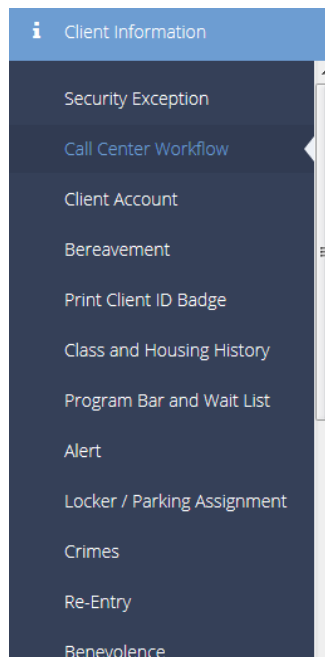


The screenshot shows the 'User Exception' form again, but now the 'User' field contains 'Elison, Adrian' and the magnifying glass icon is no longer highlighted.

Click  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.

A screenshot of a web application form titled 'Call Center W/ Alert' and 'Add Client w/ Alert Bar'. The form is divided into two main sections: 'Identifying' and 'Contact Information'. The 'Identifying' section contains fields for First Name, Last Name, Birth Date, Age, SSN, Decedent Date, Gender, Citizenship Status, Relation to H/O, Race, Primary Language, and Ethnicity. There is a 'Check For Duplicates' button. The 'Contact Information' section has an 'Address Type' dropdown set to 'Current Address' and an 'Update All Family Members' checkbox. The form has a 'Save' button and a 'Cancel' button at the bottom right. The user's name 'Adrian Ellison' is visible in the top right corner.

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.

Add Client w/ Alert Bar

Identifying

Alert:

First Name \*

Last Name \*

Birth Date \*

Age

SSN \*

Deceased Date

Gender \*

Primary Language \*

Citizenship Status

Ethnicity \*

Relation to HOH \*

Race \*

Choose Options...

Check For Duplicates

Contact Information

Address Type: Current Address

Update All Family Members: ☐

Address \*

Apt. Number

Zip Code \*

County

City

State

Country: United States of America

Latitude

Longitude

Verify Address: [Verify Address](#)

Map It: [Map It](#)

GEO Code Not Found: ☐

Cell Phone

Home Phone

Email Address

Work Phone

Confirm Email Address

Other Information

Sharing: Shared

Scan Card ID

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

Client	Program	Service	Address, City	Longitude	Latitude	Begin Date	Total
Bosell, Steve	12 Permanent Housing for Homeless Disabled	AA Meeting	111 notastreet, Salt Lake City	-111.79	40.67	4/16/2015	\$0.00
Bosell, Steve	12 Permanent Housing for Homeless Disabled	Administrative Time	111 notastreet, Salt Lake City	-111.79	40.67	4/16/2015	\$1.00
Bosell, Steve	12 Permanent Housing for Homeless Disabled	Adoption Registry	111 notastreet, Salt Lake City	-111.79	40.67	4/16/2015	\$1.00
Bosell, Steve	12 Permanent Housing for Homeless Disabled	Bus Tokens	111 notastreet, Salt Lake City	-111.79	40.67	4/16/2015	\$1.00
Bosell, Steve	12 Permanent Housing for Homeless Disabled	AA Meeting	111 notastreet, Salt Lake City	-111.79	40.67	4/16/2015	\$0.00
Bosell, Steve	12 Permanent Housing for Homeless Disabled	Administrative Time	111 notastreet, Salt Lake City	-111.79	40.67	4/16/2015	\$1.00
Bosell, Steve	12 Permanent Housing for Homeless Disabled	Adoption Registry	111 notastreet, Salt Lake City	-111.79	40.67	4/16/2015	\$1.00
Bosell, Steve	12 Permanent Housing for Homeless Disabled	Bus Tokens	111 notastreet, Salt Lake City	-111.79	40.67	4/16/2015	\$1.00
Bosell, Steve	12 Permanent Housing for Homeless Disabled	AA Meeting	111 notastreet, Salt Lake City	-111.79	40.67	4/16/2015	\$0.00
Bosell, Steve	12 Permanent Housing for Homeless Disabled	Administrative Time	111 notastreet, Salt Lake City	-111.79	40.67	4/16/2015	\$1.00
Bosell, Steve	12 Permanent Housing for Homeless Disabled	Adoption Registry	111 notastreet, Salt Lake City	-111.79	40.67	4/16/2015	\$1.00

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.

Service: Choose Options...

- ☒ AA Meeting
- ☒ Abstinence Education
- ☒ ADC
- ☒ Administrative Time
- ☒ Adoption Registry
- ☒ Adoption Support Group
- ☒ Adult Counseling Service


Add Selected Cancel

After the services have been reviewed, click on the  Save 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.



Find Client with Reservation Information Lookup


Find Client with Reservation Information

+ Add New

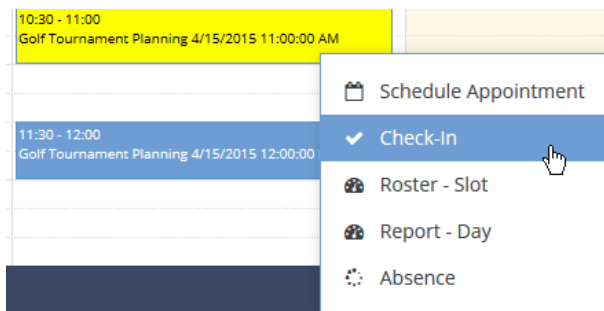
Last Name:  First Name:  Name:

Birth Date:  Scan Card ID:








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.



10:30 - 11:00  
Golf Tournament Planning 4/15/2015 11:00:00 AM

11:30 - 12:00  
Golf Tournament Planning 4/15/2015 12:00:00

-  Schedule Appointment
-  Check-In
-  Roster - Slot
-  Report - Day
-  Absence


The Check-In form displays.



Check-In

Add Front Desk Check-In

Participant	Check In *	Check Out	Hrs / Qty *
 Joseph, Steve			0.00

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

The row expands.

Check-In

Add Front Desk Check-In

Participant	Check In *	Check Out	Hrs / Qty *
<input checked="" type="checkbox"/> Bosell, Steve	04/15/2015 10:30 a	04/15/2015 11:00 a	0.5

Wt\_TimeDiff 0.5

Case Note: [Case Note](#)

Assign Case Manager ☐

Click on the [Save](#) button.

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

10:30 - 11:00 Golf Tournament Planning 4/15/2015 11:00:00 AM	
11:30 - 12:00 Golf Tournament Planning 4/15/2015 12:00:00 PM	

- Schedule Appointment
- ✓ Check-In
- Roster - Slot**
- Report - Day
- Absence


The report opens in a separate window.

1 of 1 Find | Next

## Roster Report

Run By aeliason - CaseWorthy on 4/16/2015 8:16:02 AM

Report Date ..... 4/15/2015  
Organization..... CaseWorthy  
Location..... Golf Tournament Planning



---

**CaseWorthy**  
740 East 3900 South  
Salt Lake City

**Usage Name:** Golf Tournament Planning  
**Resource Name:** Glancing Opportunity

Date	Session	Client	Signature
4/15/2015	10:30 AM - 11:00 AM	Steve Bosell	

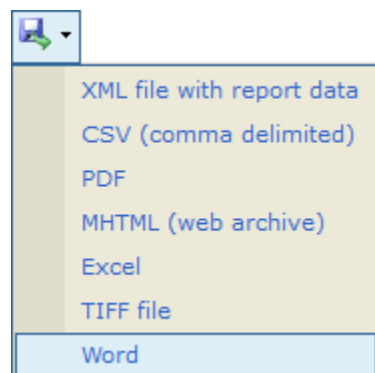
---

### Report Options

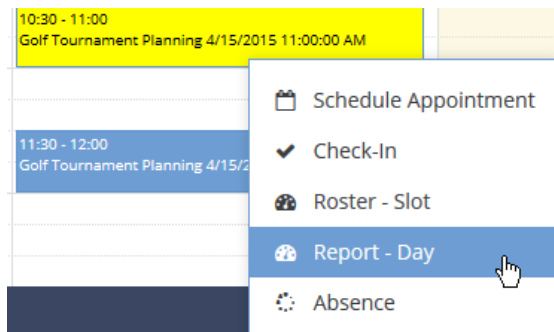
Current User: aeliason - CaseWorthy  
Report Date: April 15, 2015

Roster Report Page 1 of 1

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.




1 of 1 Find | Next

## Daily Roster Report

Run By aeliason - CaseWorthy on 4/16/2015 8:17:18 AM

Report Date .....	4/15/2015
Organization.....	CaseWorthy
Location.....	Golf Tournament Planning



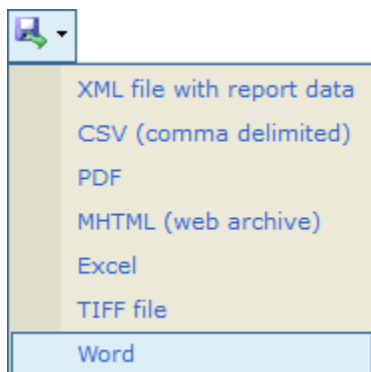
Session	Client	Special Instructions	Signature
10:30 AM - 11:00 AM	Steve Bosell		

### Report Options

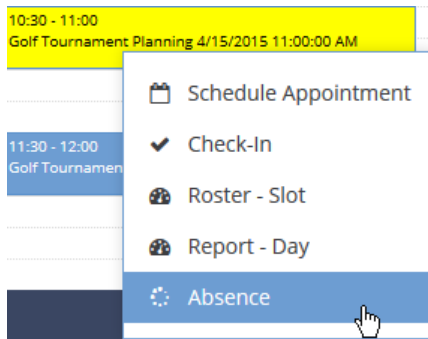
Current User:	aeliason - CaseWorthy
Report Date:	April 15, 2015

Daily Roster Report Page 1 of 1

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.




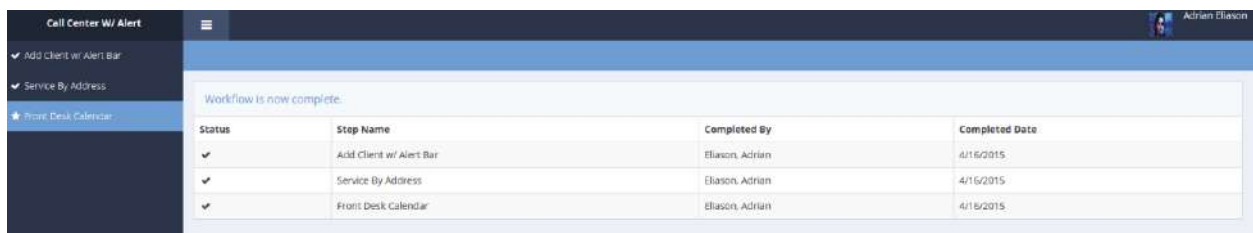
The Absence form displays a list of attendees.



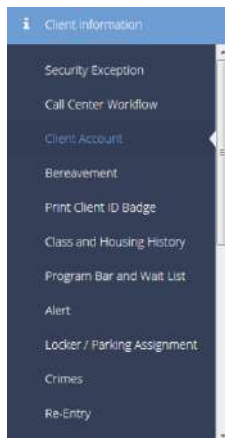
Click on the clear checkbox ☒ next to the desired name. The row expands.



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



## Client Account



## Accounts

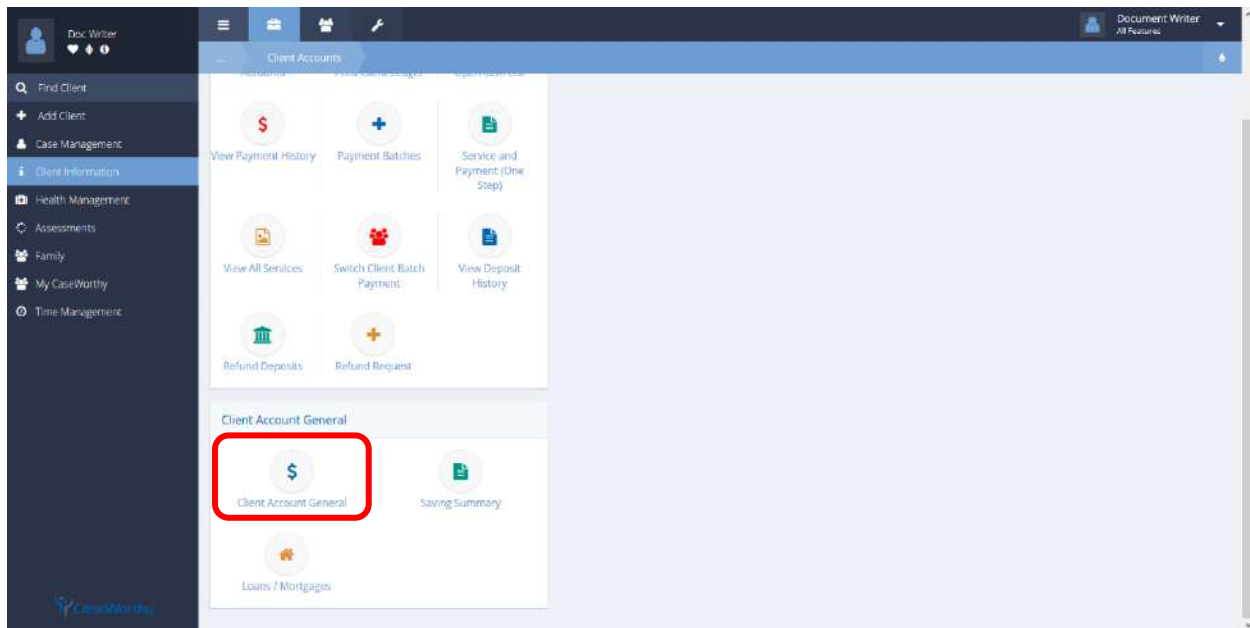
**Objective:** The Client Account Input form allows the addition of new financial accounts for the client and the Client Account Edit form provides the ability to edit the account information.

## 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 Summary <span>+ Add New</span>							
Total Rows: 3 <span>Search</span>							
	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 + Add New button.

The Client General Account form displays.

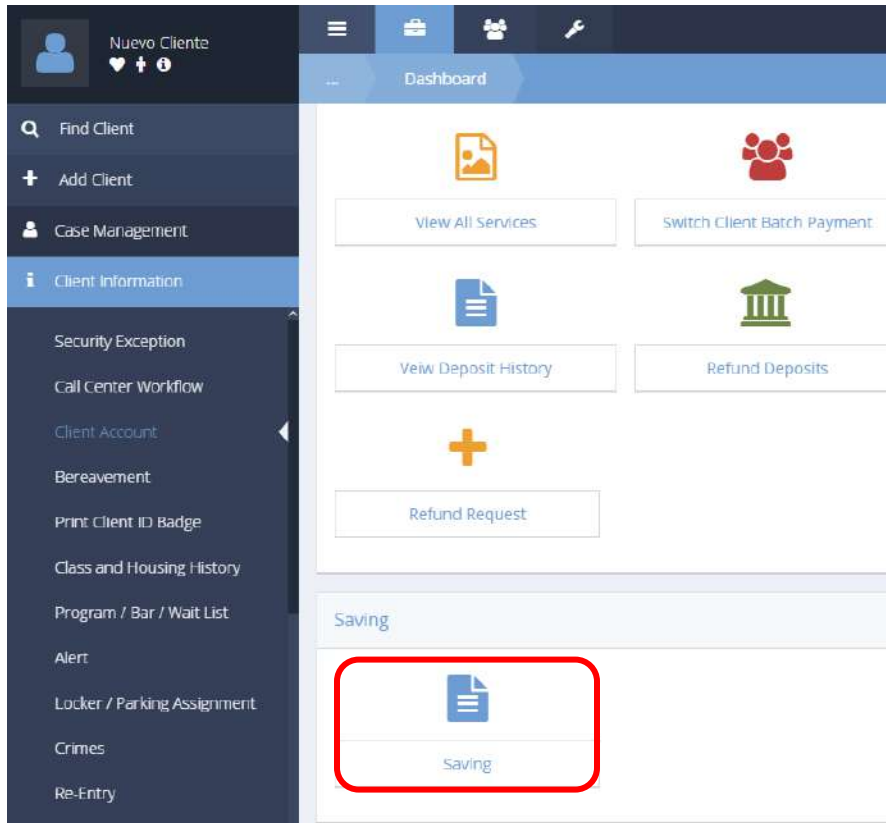
Client General Account <span>+ Save</span> <span>Cancel</span>	
Account Type *	Client General Account
Client Account Name *	<input type="text"/>

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


Client Account Summary								
								+ Add New
Total Rows: 3								
Account ID	Month	Year	Client Account Name	Account Type	Organization	Created Date	Current Balance	
464			account1	Savings	CaseWorthy	1/6/2015	\$0.00	
465			account2	Savings	CaseWorthy	1/6/2015	\$0.00	
466			account3	Savings	CaseWorthy	1/6/2015	\$0.00	

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.

Client Account Name	Account Type	Organization	Original Loan	Current Balance	Client Account ID
Bosell, Steve		CaseWorthy			485

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

Client Account Name	Account Type	Organization	Original Loan	Current Balance	Client Account ID
Bosell, Steve		CaseWorthy			485

The Client Account Summary Balances form displays.

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

Click  Add New to enter a new transaction.

The Client Account Transaction Input form displays.

Client Account Transaction Input

Transaction Date \* 02/26/2015

Transaction List \*

Description \*

Amount \* 0.00


Reference ID (Check # or CC, Last 4 Digits)

Client Account Information

Account Type

Client Account Name Bosell, Steve

Client Account ID 485

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 Summary Balances

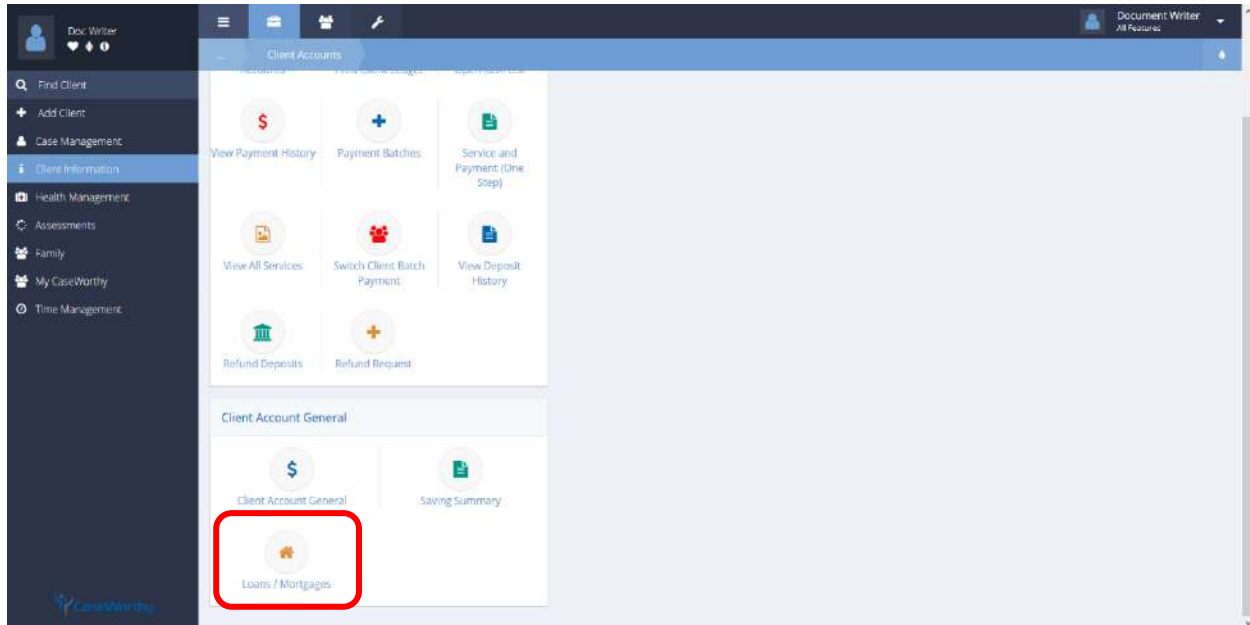
Total Rows: 1

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							
Total Rows: 5							
	Client Account Name	Month / Year	Provider / Organization	Account Type	Original Loan	Current Balance	Account ID
⚙	Repayment Loan - No Interest	8 / 2014	CaseWorthy	Mortgage Loan	\$400.00	\$400.00	362
⚙	Repayment Loan - No Interest	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.

Client Account Summary

Total Rows: 5

	Client Account Name	Month / Year	Provider / Organization	Account Type	
	✓ Edit	8 / 2014	CaseWorthy	Mortgage Loan	
	Summary Balances	7 / 2015	CaseWorthy	Mortgage Loan	
	Services and Payments		CaseWorthy	Mortgage Loan	
	Print Client Ledger		CaseWorthy	Mortgage Loan	
	View Transactions		CaseWorthy	Mortgage Loan	

The Service Client Summary form displays.

Service Client Summary

**\$ Client Payments** Record Services

Batch ID and Remaining Balance #

	Service Date	Service	Apply Amount	Service Total	Paid to Date	Remain	Svc ID
<input checked="" type="checkbox"/>	8/15/2014	AA Meeting	\$0.00	\$50.00	0	\$50.00	1207064
<input checked="" type="checkbox"/>	8/29/2014	AA Meeting	\$0.00	\$25.00	0	\$25.00	1207065

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.

	Service Date	Service	Apply Amount	Service Total	Paid to Date	Remain	Svc ID
<input checked="" type="checkbox"/>	8/15/2014	AA Meeting	\$0.00	\$50.00	0	\$50.00	1207064
<input checked="" type="checkbox"/>	08/29/2014	AA Meeting	0.00	25.00	0	\$25.00	1207065
Batch ID							
			Payment Amount to Apply	\$0.00			
			Total Applied Amount	\$0.00			
			Remaining Amount	\$0.00			

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

The Client Account Payments form displays.

Batch ID	Payment Date *	Amount *	Type *	Reference Number
<input checked="" type="checkbox"/> 1465572186	6/10/2016	\$600,000.00	Money Order	654654
<input checked="" type="checkbox"/> 1465571843	6/10/2016	\$500.00	Money Order	5454

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

Batch ID	Payment Date *	Amount *	Type *	Reference Number
<input checked="" type="checkbox"/> 1465572186	06/10/2016	600000.0	Money Order	654654
Target Account * 11testaccount				
<input checked="" type="checkbox"/> 1465571843	6/10/2016	\$500.00	Money Order	5454

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.

Service Date	Service	Apply Amount	Service Total	Paid to Date	Remain	Svc ID
<input checked="" type="checkbox"/> 8/15/2014	AA Meeting	\$0.00	\$50.00	0	\$50.00	1207064
<input checked="" type="checkbox"/> 8/29/2014	AA Meeting	\$0.00	\$25.00	0	\$25.00	1207065

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

Please make sure this client already has an account created.

Category  Program

**Search**

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

Record Services



Mortgage Services-Spreadsheet

Please make sure this client already has an account created.

Category: Housing Program: CC Emergency Services

Service	Begin Date	Units *	Unit Value	Total	Accounts

Save Cancel


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.

Client Account Summary

Total Rows: 5

		Month / Year	Provider / Organization	Account Type	Original Balance
✓ Edit					
Summary Balances		8 / 2014	CaseWorthy	Mortgage Loan	
Services and Payments		7 / 2015	CaseWorthy	Mortgage Loan	
Print Client Ledger			CaseWorthy	Mortgage Loan	
View Transactions	Bank taxes	5 / 2016	CaseWorthy	Mortgage Loan	
Loan to Pay off CC			CaseWorthy	Mortgage Loan	

The Print Ledger form displays.

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

Description	Installment Due Date	Installment	Payment Date	Client Payment	Balance
Original Loan Amount:					\$400.00
Current Balance:					

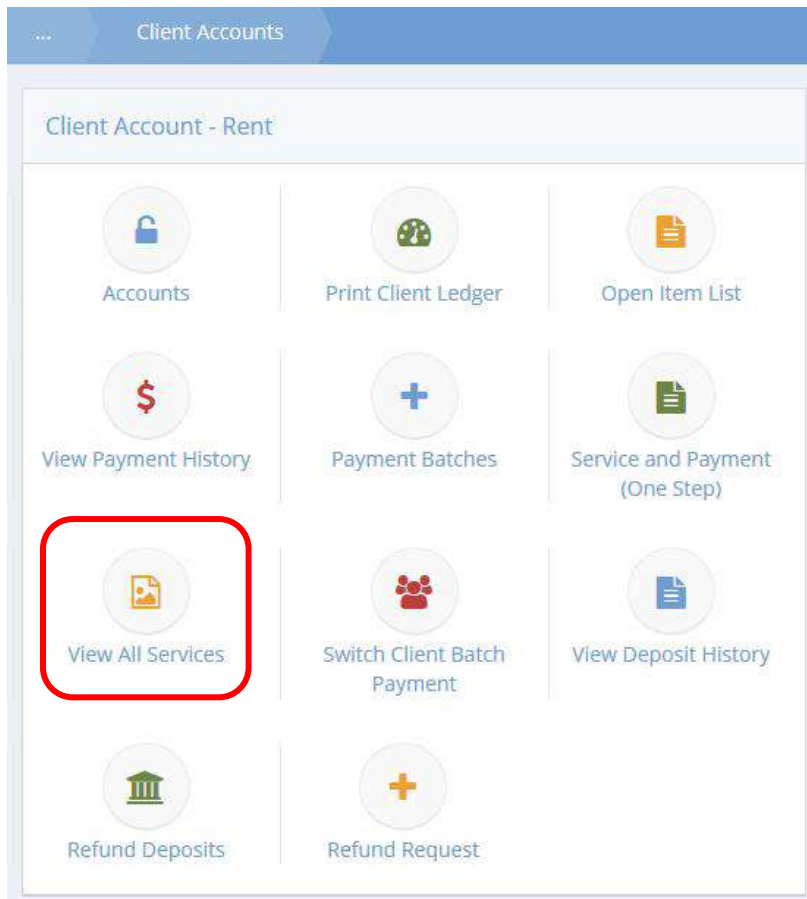
Select desired print/save options from the save  icon.



## *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	

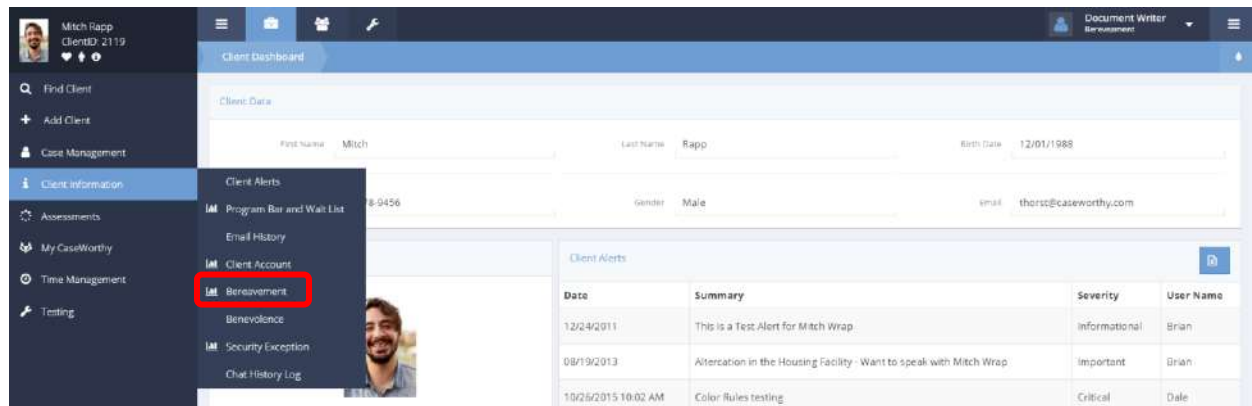
Locate the desired service and click the hyperlinked text in the Diagnoses column. The Diagnosis Codes by Service form displays a list of diagnoses for the service.

Diagnosis Codes by Service			
Version	Long Description	Code	System ID
9	Other specified psychophysiological malfunction	305.8	3360
9	Psychogenic pain, site unspecified	307.80	3387

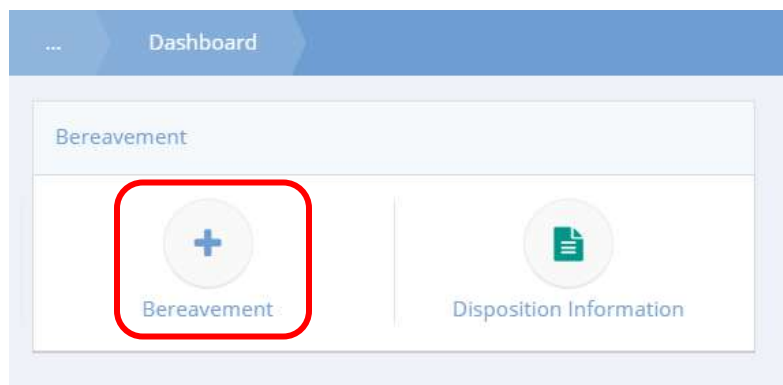
## Bereavement

**Objective:** Record and manage client bereavement information.

**Navigation:** Client Dashboard>Client Information>Bereavement

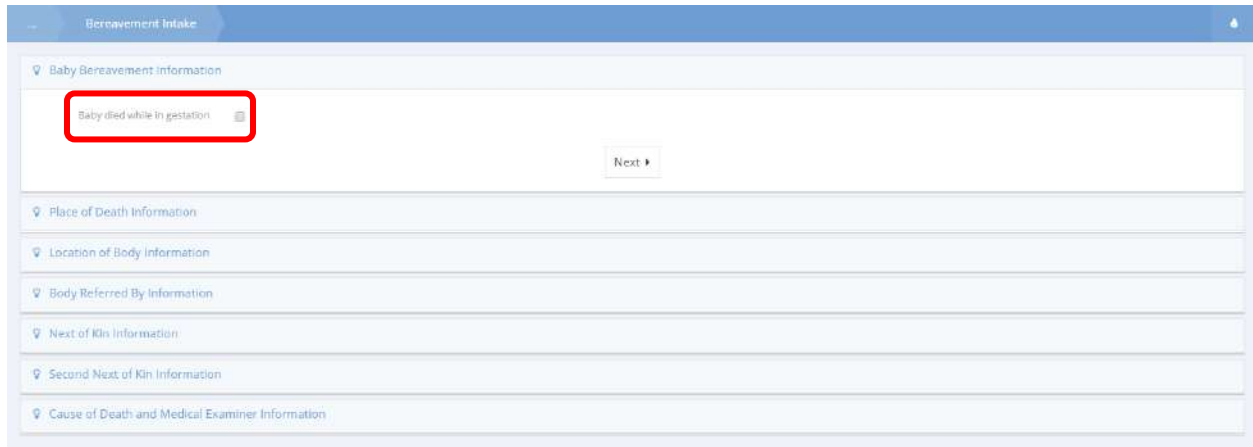


Select Bereavement from the Client Information menu under the Case Management tab. The Bereavement dashboard displays.



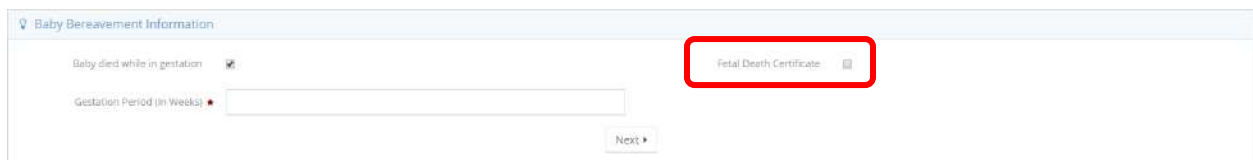
To enter bereavement information, click on the Bereavement icon.

The Bereavement Intake form displays.



The screenshot shows the 'Bereavement Intake' form. The 'Baby Bereavement Information' section is expanded, showing a checkbox labeled 'Baby died while in gestation' which is highlighted with a red rectangle. To the right of this checkbox is a 'Next' button. Below this section are several other sections, each with a dropdown arrow: 'Place of Death Information', 'Location of Body Information', 'Body Referred By Information', 'Next of Kin Information', 'Second Next of Kin Information', and 'Cause of Death and Medical Examiner Information'.

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



The screenshot shows the 'Bereavement Intake' form with the 'Baby Bereavement Information' section expanded. The 'Baby died while in gestation' checkbox is checked. Below it is a text field labeled 'Gestation Period (in Weeks)'. To the right of this section is a checkbox labeled 'Fetal Death Certificate' which is highlighted with a red rectangle. A 'Next' button is located at the bottom right of the section.

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.

Place of Death Information

Housing Status

Place of Death

Contact Place of Death Name

Place of Death Address

Place of Death City

Place of Death Zip Code

Place of Death Telephone

Place of Death Address 2

Place of Death State

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

Location of Body Information

Body Location Name

Body Location Address

Body Location City

Body Location Zip Code


Body Location Telephone

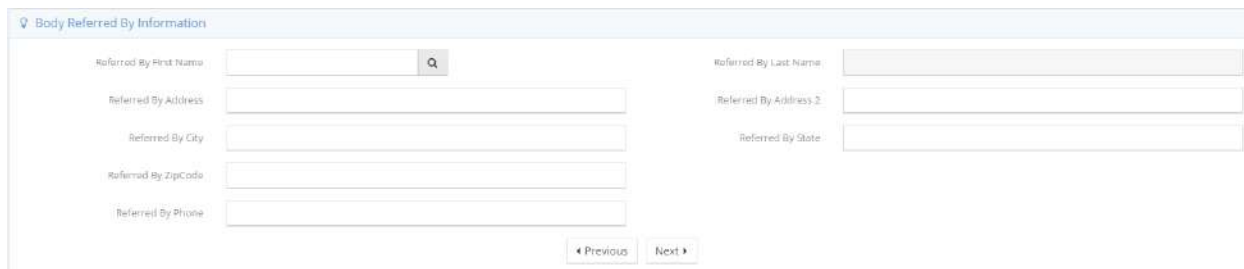
Body Location State



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

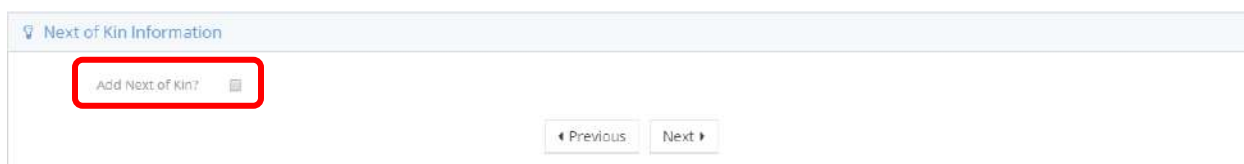
Hospital Lookup		
Hospital		
Provider Name	Address	Work Phone
St Mark		
Allen's Agency		
U of U Hospital	145 Freemans Bridge Road, Schenectady, NY 12302	
test test test		
QA_Organization_1	.SCHENECTADY, NY 12301	

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.

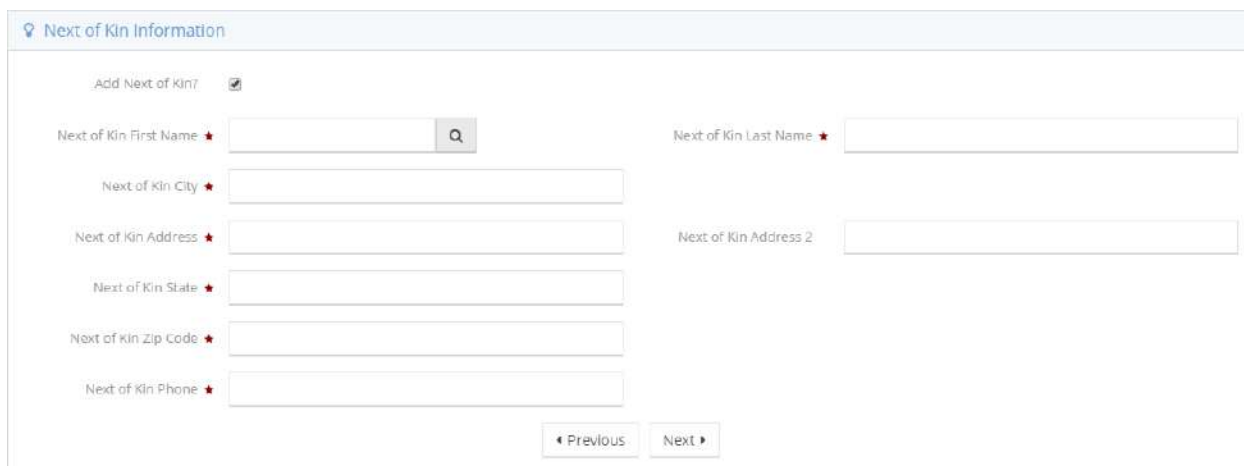
Click the  button to collapse the Location of Body Information section, and expand the Body Referred By Information section.




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  button to expand the Next of Kin Information section.



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

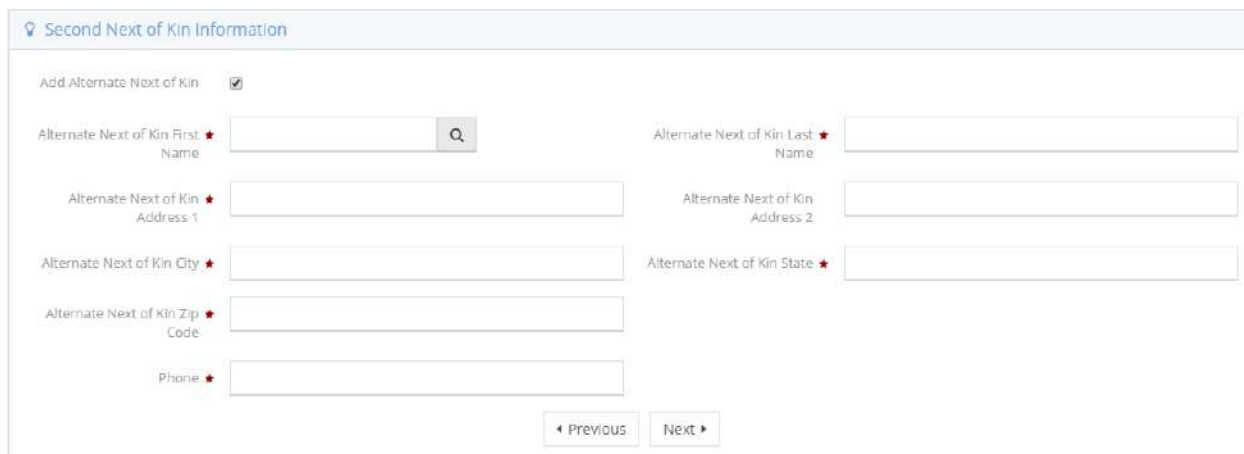




Click the  icon to look up an existing contact. Select a contact to populate the remaining fields of information. If fields remain blank, fill in the rest of the required spaces manually.

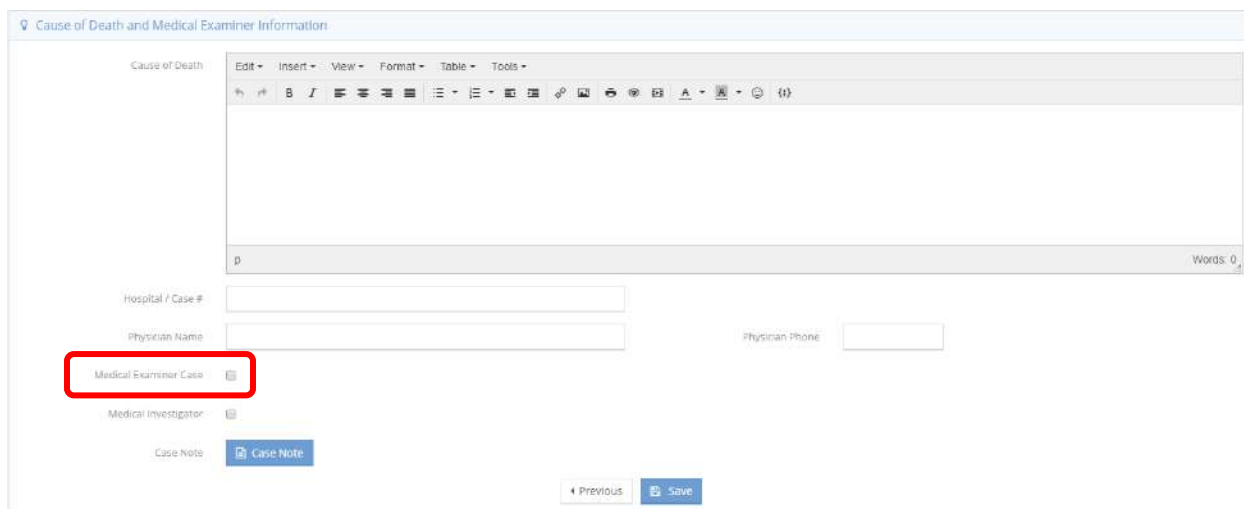
Click the  button to expand the Second Next of Kin Information section.



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  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.

Medical Examiner Case ☒

ME First Name

ME Last Name

Investigator/ME Number

ME Cell Phone

Medical Investigator ☐

Case Note

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.

Medical Investigator ☒

Investigator First Name

Investigator Last Name

Investigator Email

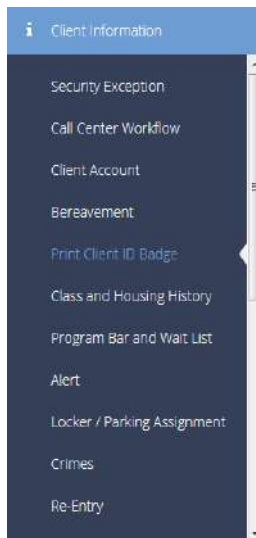
Investigator Cell Phone


Case Note

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  button. Click the  button to return to the Bereavement dashboard.



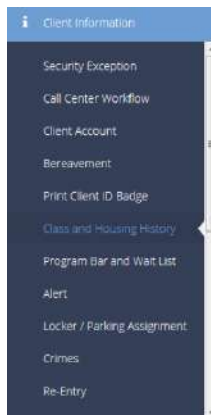
## Print Client ID Badge



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.

**Class Attendance History**

Attendance Date	Begin Date - End Date	Class Name	Resource
01/22/2015 9:29 AM	01/22/2015 - 01/22/2015	CNA Training	Computer Room - 1st Floor, Main Building, Rm 206

**Class Reservation**

Begin Date - End Date	Class Name	Resource
01/22/2015 - 01/23/2015	CNA Training	Computer Room - 1st Floor, Main Building, Rm 206

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

**Class Room**

Reservations Attendance

Absences Coordinated Assessment Beds

**Housing**

Reservations Check-ins

Absences

**Class Attendance History**

Attendance Date	Begin Date - End Date	Class Name	Resource
01/22/2015 9:29 AM	01/22/2015 - 01/22/2015	CNA Training	Computer Room - 1st Floor, Main Building, Rm 206

**Class Reservation**

Begin Date - End Date	Class Name	Resource
01/22/2015 - 01/23/2015	CNA Training	Computer Room - 1st Floor, Main Building, Rm 206

The Client Housing Reservations form displays.

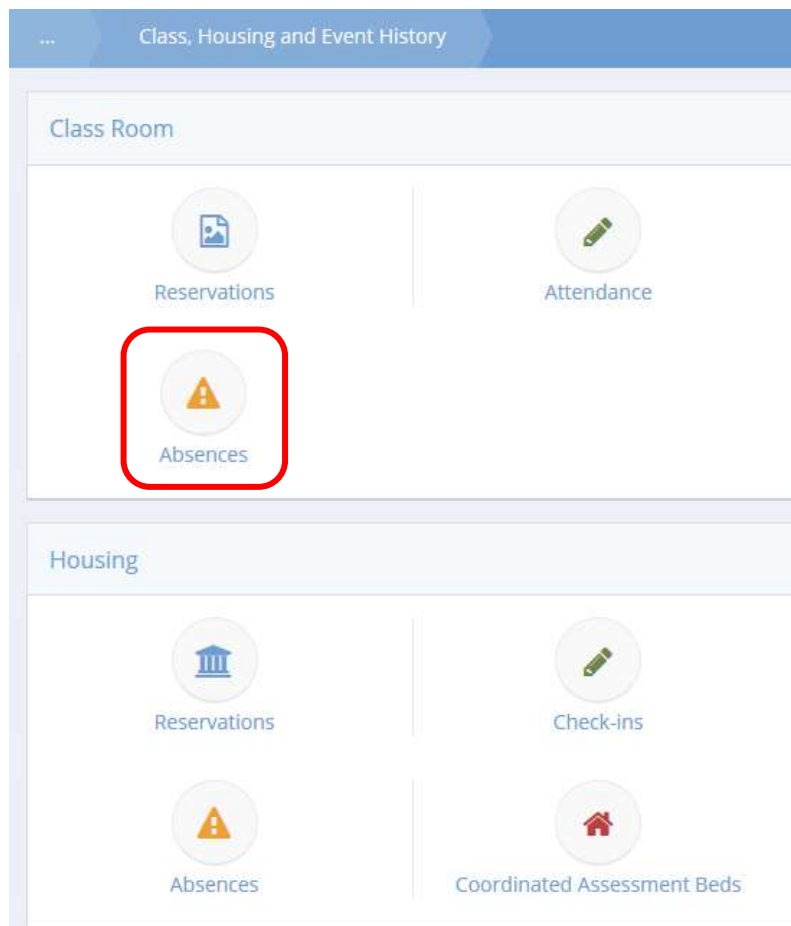
Client Housing Reservations

Total Rows: 2

Provider	Resource / Location	Class	Start - End Dates
CaseWorthy	Minor Emergency Housing	Safe Haven Section	4/1/2015 - Present
CaseWorthy	Minor Emergency Housing	Safe Haven Section	4/1/2015 - 1/1/1900

## Client Classroom Absence

**Objective:** View a summary of client classroom absences.



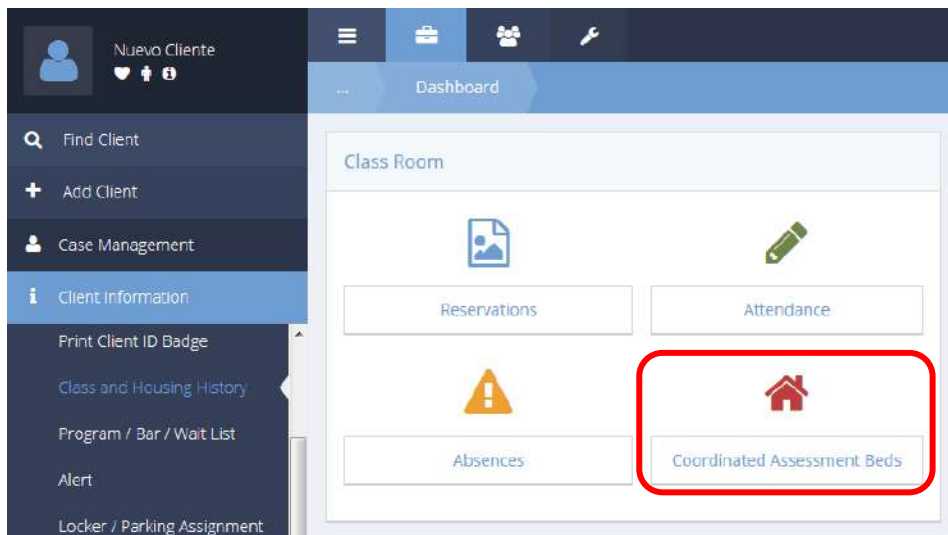
Click the icon for Absences under the Class Room section. The Resource Usage Attendance form displays.

Resource Usage Attendance					
Total Rows: 1					
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.

A screenshot of the 'Coordinated Assessment Bed Availability' form. At the top is a blue header bar with the title 'Coordinated Assessment Bed Availability'. Below it is a light blue input area with a placeholder text 'Enter the "Date" to view Coordinated Assessment beds.' and a date field showing '12/29/2014'. At the bottom right of the form is a red 'Search' button with a magnifying glass icon.

Enter a date and click the  Search 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, Dale	Cell	801-555-1212	Office	907-555-1212	dseay@gmail.com
Barry, Davis	Office		Cell		bbingel@CaseWorthy.com
User, Approval, Approval	Cell		Office		
Jane, JaneH	Cell		Office		jjoe@CaseWorthy.com









Click  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.

Manor Emergency Housing  
Emergency Shelter Section

04/07/2015

Single Bed Available

Client Reservation

Future Checked In Reserve Absent Handicap Accessible Electric Outlet Coordinated Assessment Refresh Cancel

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.

Client Reservation

Reservation Dates


Start Date \* 01/07/2015

End Date \* 01/07/2015

Contact

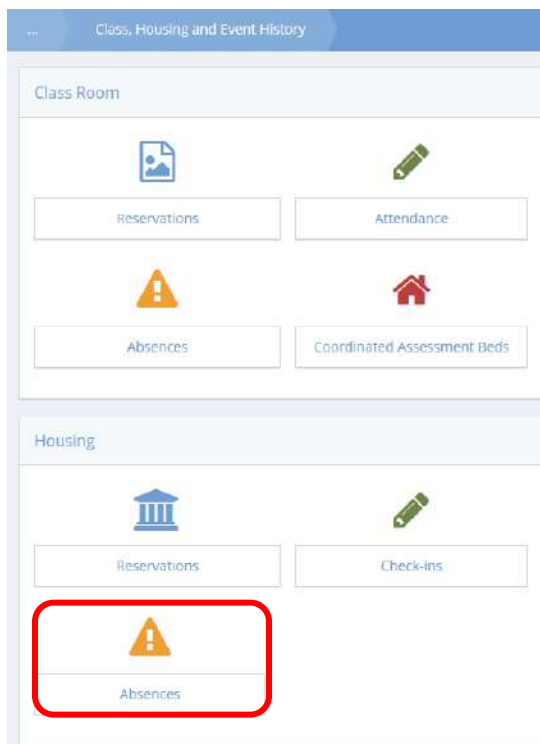
Email / Notify Create Email

Save Cancel

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

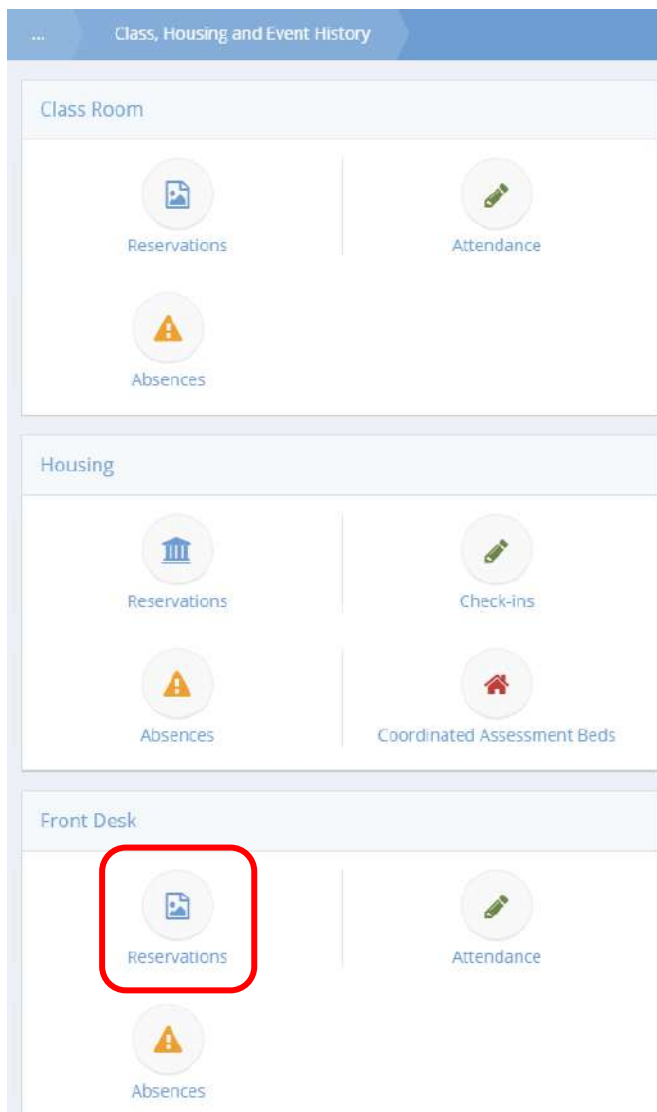
The screenshot shows the "Client Absence" form. At the top, there is a blue header bar with the text "Client Absence" and a search icon. Below the header, there is a blue bar indicating "Total Rows: 0". Below this, there is a table with the following columns: "Begin - End Dates", "Resource", "Usage Name", "Absence Type", and "Absence Reason". The table is currently empty.

Begin - End Dates	Resource	Usage Name	Absence Type	Absence Reason
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## Client Front Desk Reservations

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

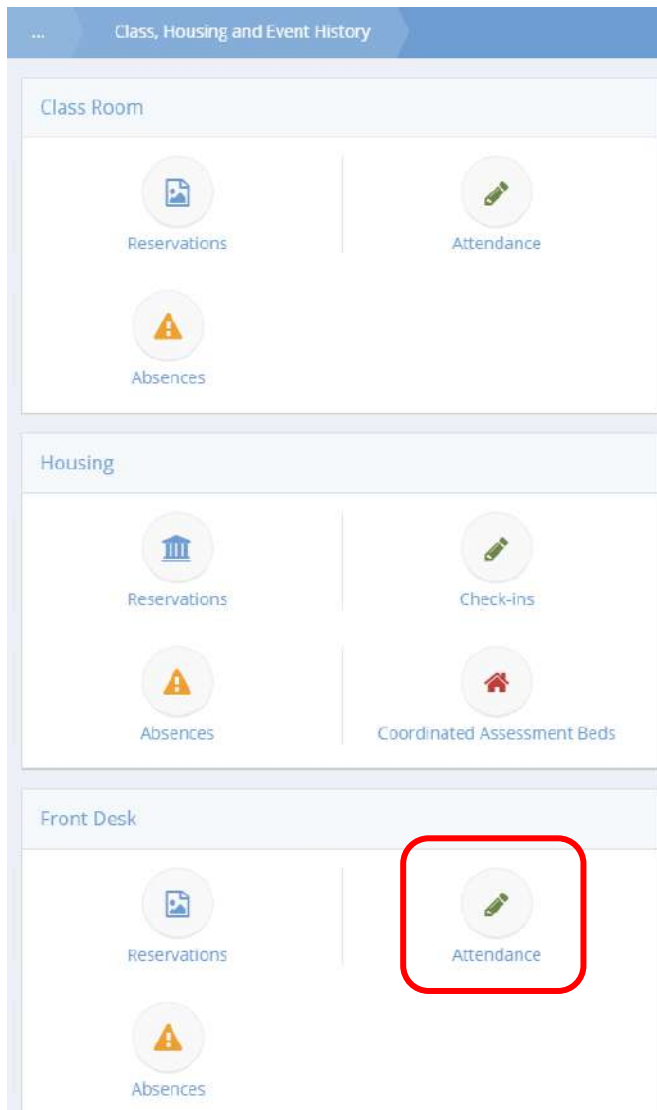


Click the icon for Reservations in the Front Desk section.

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

Client Housing Reservations			
Total Rows: 2			
Provider	Resource / Location	Class	Start - End Dates
CaseWorthy	Glancing Opportunity	Jane Front Office	1/23/2015 - 1/23/2015
CaseWorthy	Glancing Opportunity	Eric's Front Office	1/20/2015 - 1/20/2015

## Front Desk Attendance



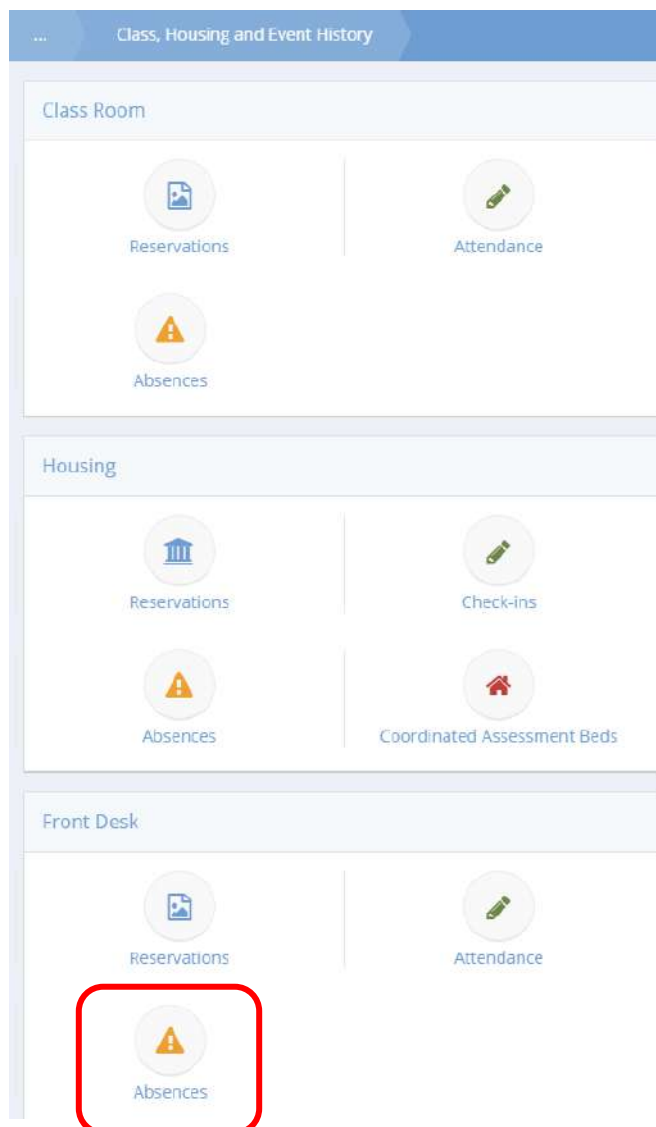
To view a history of the current client's event attendance, click the Attendance icon.

The screenshot shows a spreadsheet titled 'Event Attendance History'. It contains one data row with the following information:

Begin Date	End Date	Resource Name	Usage Name	Units
8/4/2014	8/4/2014	Glancing Opportunity	Golf Tournament Planning	4.00

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

## Front Desk Absences

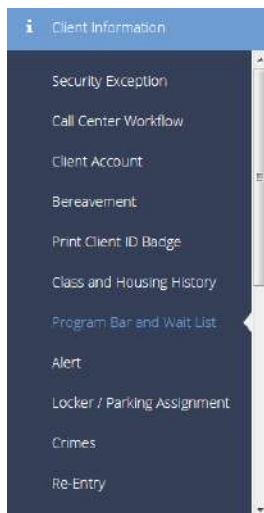


To view a history of the current client's absences, click the Absences icon.

Client Absence				
Total Rows: 1				
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

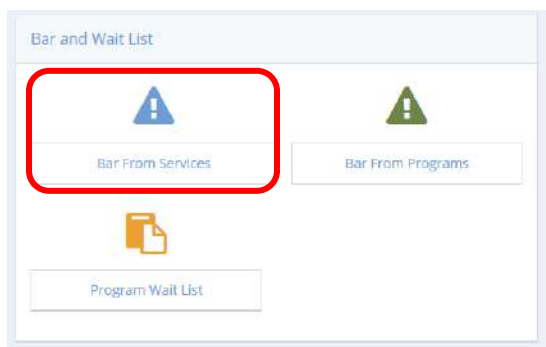
Any client absences display in the spreadsheet.

## 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 **+ Add New** to bar a client from a service.

Service Bar List			+ Add New
Total Rows: 2			
Service	Begin Date - End Date	Reason	
Abstinence Education	1/26/2015 - 1/27/2015	Cursing Only	
AA Meeting	1/26/2015 - 1/28/2015	Drunk Only	

The Add New form displays.

Add New

Service	Begin Date *	End Date	Reason *	Restriction *
<input checked="" type="checkbox"/> AA Meeting				
<input checked="" type="checkbox"/> Absorbance Education	01/26/2015			shared
<input checked="" type="checkbox"/> ADC				
<input checked="" type="checkbox"/> Administrative Time				
<input checked="" type="checkbox"/> Adoption Registry				
<input checked="" type="checkbox"/> Adoption Support Group				
<input checked="" type="checkbox"/> Adult Counseling Service				
<input checked="" type="checkbox"/> Adult Day Care				

Reason \* dropdown menu:

- Nothing
- CM - Failure to Comply
- Cursing Only
- Drug Use/Selling/Possession
- Drunk Only
- Disorderly/Refusing Test
- Entrance, Unauthorized

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

Program Bar and Wait List

Bar and Wait List

Bar From Services

Bar From Programs

Program Wait List

Probation

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.

Client-Side Program Bar Summary

[+ Add New](#)

Total Rows: 2

Program Name	Begin - End Date	Bar List Reason	Case Note
<input checked="" type="checkbox"/> _CEAP / Utility Assistance	1/26/2015 - Present	Cursing Only	
<input checked="" type="checkbox"/> 2 YAGA	1/26/2015 - Present	Drunk Only	

Client-Side Program Bar List Input

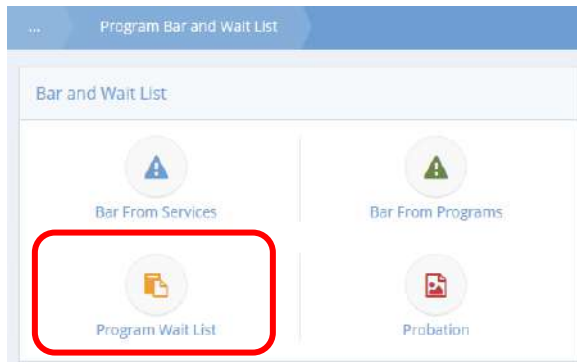
Search

Program	Begin Date *	End Date	Bar Reason *
<input checked="" type="checkbox"/> Isample prog (HIV)			
<input checked="" type="checkbox"/> _CEAP / Utility Assistance	01/26/2015	12/31/9999	
<input checked="" type="checkbox"/> _Employment with Substance Abuse			
<input checked="" type="checkbox"/> 09 Head Start			
<input checked="" type="checkbox"/> 1 English for Employment			
<input checked="" type="checkbox"/> 12 Permanent Housing for Homeless Disabled			

Bar Reason \* dropdown menu:

- Nothing
- CM - Failure to Comply
- Cursing Only
- Drug Use/Selling/Possession
- Drunk Only
- Disorderly/Refusing Test
- Entrance, Unauthorized

## 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.

The screenshot shows the 'Client-Side Program Wait List Summary' form. It includes a table with one row of data. The '+ Add Item' button is highlighted with a red box.

Program Name	Effective Date	Organization	Wait List Date	Status	Case Note
Sample prog (HIV)	1/26/2015		1/26/2015	Open	

The screenshot shows the 'Client-Side Program Wait List Input' form. It includes fields for 'Original Wait List Date', 'Program', 'Service', 'Program Contact', and 'Status'. The 'Case Note and Restriction Information' section is also visible.

Original Wait List Date:

Program:

Service:

Program Contact:

Status:

Case Note and Restriction Information

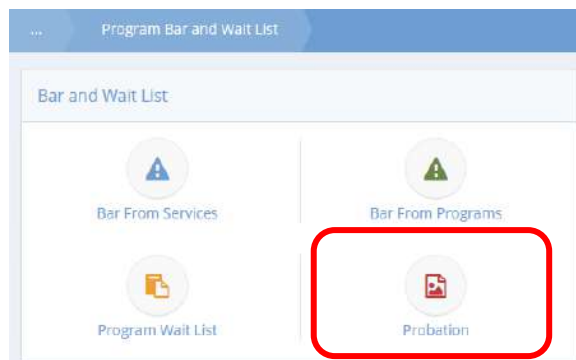
Case Note:

Restriction:

Issue:

## Entity Probation

**Objective:** Manage client probation info.



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



Total Rows: 1				
Probation Begin - End Date	Context Type	Probation Type	Description	Status
7/2/2015 - 7/16/2015	Incident Report	Program Violation	broke the rules	Open

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



Begin Date:	07/02/2015	Target End Date:	
End Date:			
Probation Type:		Status:	
Description:			
Source of Probation:	Incident Report		

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




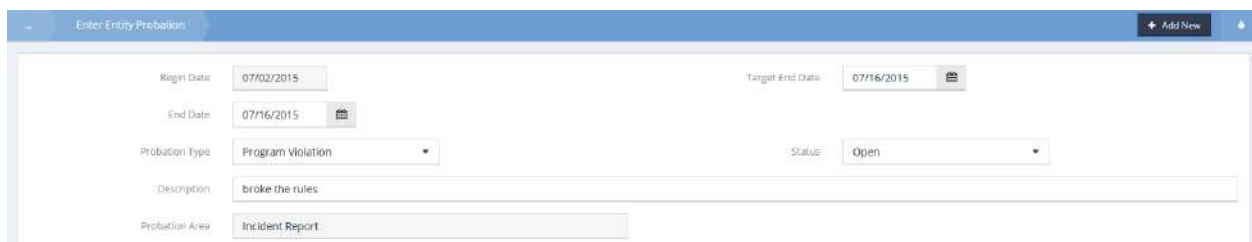
## Edit



The screenshot shows a table titled 'Entry Probation' with a header bar containing a back arrow, the title, and an 'Add New' button. Below the header, it says 'Total Rows: 1'. The table has five columns: 'Probation Area', 'Context Type', 'Probation Type', 'Description', and 'Status'. A red box highlights the 'Edit' button in the first row, which is located in the 'Probation Area' column. The data in the first row is: Probation Area: Probation Area, Context Type: Incident Report, Probation Type: Program Violation, Description: broke the rules, Status: Open.


Probation Area	Context Type	Probation Type	Description	Status
Probation Area	Incident Report	Program Violation	broke the rules	Open

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

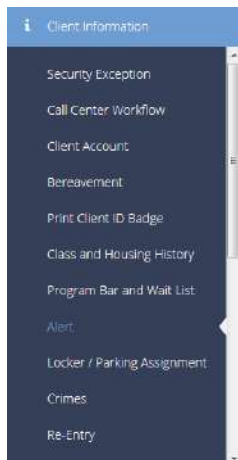


The screenshot shows the 'Enter Entry Probation' form. It has a header bar with a back arrow, the title, and an 'Add New' button. The form contains several fields: 'Begin Date' (07/02/2015), 'End Date' (07/16/2015), 'Target End Date' (07/16/2015), 'Probation Type' (Program Violation), 'Status' (Open), 'Description' (broke the rules), and 'Probation Area' (Incident Report). There are also calendar icons next to the date fields.

Begin Date	07/02/2015	Target End Date	07/16/2015
End Date	07/16/2015		
Probation Type	Program Violation	Status	Open
Description	broke the rules		
Probation Area	Incident Report		

Make any desired changes and click  Save 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.*

Client Alerts <span>+ Add New</span>			
Summary Description	Created Date	Severity	Restriction
summary	3/6/2015	Critical	Shared

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

Add New

Edit Client Alert

Date \*

End Date  Present

Summary \*

Severity \*

Type \*

Status \*

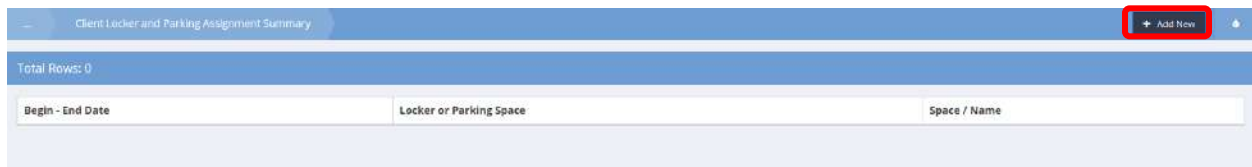
▼ Restriction Information

Restriction

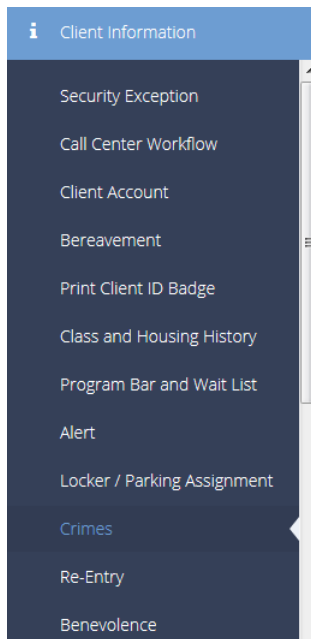
## Locker and Parking Assignment



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.

A screenshot of the 'Enter Client Locker and Parking Space Assignments' form. The form has a blue header bar with the title 'Enter Client Locker and Parking Space Assignments' on the left and a '+' icon on the right. The form is divided into three sections. The first section, 'Select the location and space', contains two dropdown menus: 'Resource / Location #' and 'Locker or Parking Space #'. The second section, 'Specify the Locker or Parker Space date range', contains two date pickers: 'Begin Date' (set to 03/06/2015) and 'End Date' (set to Present). The third section, 'Restriction Information', contains a dropdown menu for 'Restriction' (set to Shared).

## 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.

The screenshot shows the 'Client Crimes Summary' form. At the top right, there is a '+ Add New' button highlighted with a red box. Below this, a table displays the current crimes:


Description	Crime Date	Parole Date	Parole State	Case Note
Thrift	3/5/2015			
Exposure	3/4/2015	3/5/2015	Utah	

Below the table, there is an 'Add New' section. The 'Crimes' tab is selected. The form includes fields for 'Crime Date', 'Crime Description', 'Case Note', and 'Restriction'. The 'Conviction Status' dropdown is highlighted with a red box and set to 'Convicted'. Other fields include 'Parole Date', 'Parole County', 'Parole Officer First Name', 'Parole Officer Last Name', 'Parole State', and 'Restriction Reason'.

## Parole Officer's Name Lookup

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

Client Crimes Summary				
Total Rows: 2				
Description	Crime Date	Parole Date	Parole State	Case Note
Thrift	3/5/2015			
Exposure	3/4/2015	3/5/2015	Utah	

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

Client Crimes Summary				
Total Rows: 2				
Description	Crime Date	Parole Date	Parole State	Case Note
Thrift	3/5/2015			
Exposure	3/4/2015	3/5/2015	Utah	

The Crime Input form displays.

Description	Exposure		
Crime Date	03/04/2015	Status	Convicted
If the Client is convicted, parole information fields will display			
Parole Date	03/05/2015	Parole Officer's First Name	Parole Officer's Last Name
Parole County	Salt Lake	Parole State	Utah
Probation Reason		Restriction	Shared
Case Note	Case Note		

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

Select Client Entity Contacts Lookup					
Relationship	Name	Emergency Contact	Email	Phone1 Type	Phone1
Attorney	Blazengale, DeKores	No			
Attorney	Weirman, Harvey	No			
Parole Officer	Santos, Jay	No			

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

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

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

Relationship	Name	Emergency Contact	Email	Phone1 Type	Phone1
Attorney	Blozengale, Dolores	No			
Attorney	Weisman, Harvey	No			
Parole Officer	Santos, Jay	No			

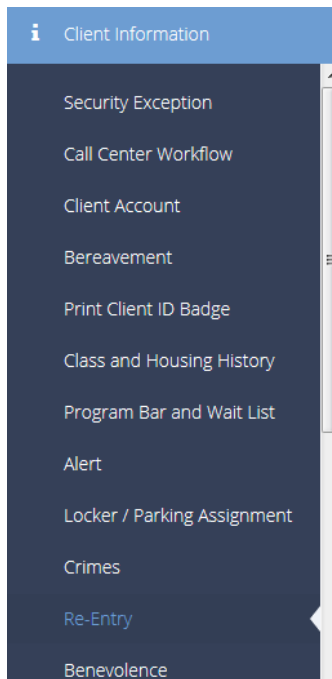
Click on the desired parole officer's row.

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

The screenshot shows the 'Crime Input' form. The 'Description' field contains 'Exposure'. The 'Crime Date' is '03/04/2015'. The 'Status' dropdown is set to 'Convicted'. A light blue banner states: 'If the Client is convicted, parole information fields will display'. Below this, the 'Parole Date' is '03/05/2015'. The 'Parole Officer's First Name' is 'Jay' and the 'Parole Officer's Last Name' is 'Santos'. The 'Parole County' is 'Salt Lake' and the 'Parole State' is 'Utah'. The 'Probation Reason' and 'Restriction' dropdowns are empty. A blue button labeled 'Case Note' is at the bottom left.

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

 A screenshot of the 'Re-Entry Summary' section. At the top, it says 'Total Rows: 1'. In the top right corner, there is a button labeled '+ Add New' which is highlighted with a red rectangle. Below this is a table with the following data:
 

Intake Date	Date Entered	Case Note	Prisoner ID
3/6/2015 12:00:00 AM	3/6/2015 - Present		5555551

 A screenshot of the 'Edit Re-Entry Entry Contact' form. The form contains several input fields and buttons. The following fields are highlighted with red rectangles:
 

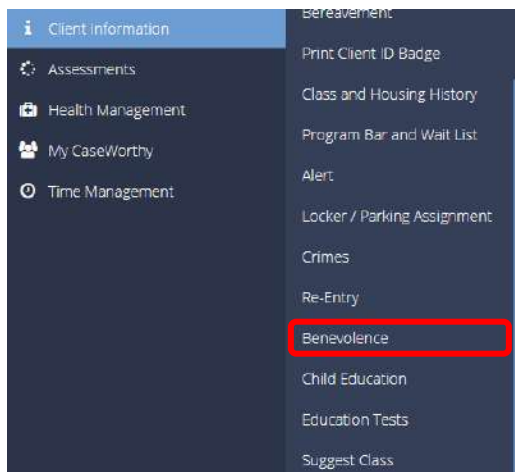
- 'Prisoner ID Reference Number' field.
- 'Attorney First Name' and 'Parole Officer First Name' fields, each with a search icon (magnifying glass) to its right.

 Other visible fields include 'Intake Date' (set to 03/06/2015), 'Date Entered', 'Date Released', 'Sex Offender', 'Attorney Last Name', 'Parole Officer Last Name', 'Restriction' (set to Shared), and a 'Case Note' button.





## 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.*

Benevolence Summary				
Total Rows: 1 <span style="float: right;">+ Add New</span>				
Payee Assign Date	Guardian Assign Date	Restriction	State Reference ID	Case Note
3/5/2015 12:00:00 AM	3/5/2015	Shared	1111	

Add New

Edit Benevolence

State Reference ID

Enter the date the payee and guardian were assigned to this client. Once the dates are identified, enter the specific payee and guardian contacts for this client.

Payee Assign Date

Payee First Name

Payee Last Name

Guardian Assign Date

Guardian First Name

Guardian Last Name

Case Note and Restriction Information

Case Note


Restriction

## 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 **+ Add New** button in the top right corner.

A screenshot of the 'Child Education Summary' form. At the top, there is a blue header bar with the text 'Child Education Summary' and a '+ Add New' button (highlighted with a red rectangle). Below the header, there is a table with the following columns: 'Enrollment Date', 'School', 'Grade', 'In ASCP', and 'Case Note'. The table contains one row with the following data: '3/6/2015', 'Test High School', 'Eleventh Grade', 'No', and an empty 'Case Note' field. Below the table, there is a section titled 'Add New' with the subtitle 'Enter Child Education Information'. This section contains several input fields: 'Enrollment begin Date', 'Enrollment end Date', 'School Name #' (highlighted with a red rectangle), 'School Type' (set to 'Public School'), 'Grade #' (a dropdown menu), 'Child in After School Care Program' (a checkbox), 'Address, City, State', 'Phone Number', 'Case Note' (with a 'Case Note' button), and 'Restriction' (set to 'Shared').

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

Child Education Summary					+	Add New
Total Rows: 1						
	Edit		School	Grade	In ASCP	Case Note
	Grades & Attendance		Test High School	Eleventh Grade	No	
Delete						

Click  to add new grade and attendance information.

Grade					+	Add New
Total Rows: 1						
	Term	Grade Point Avg	Unexcused Absence	Verifier Name	Case Note	
	1st	3.5	1			

Add Grade

Term Type \*

Grade Point Avg

Attendance and Absences

Total School Days

Excused Absence

Unexcused Absence

Verification Information

Verifier Name

Verified School Representative

Date Verified

Case Note

Case Note

Restriction

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

Grade					+	Add New
Total Rows: 1						
	Edit		Grade Point Avg	Unexcused Absence	Verifier Name	Case Note
	Courses		3.5	1		
Delete						

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

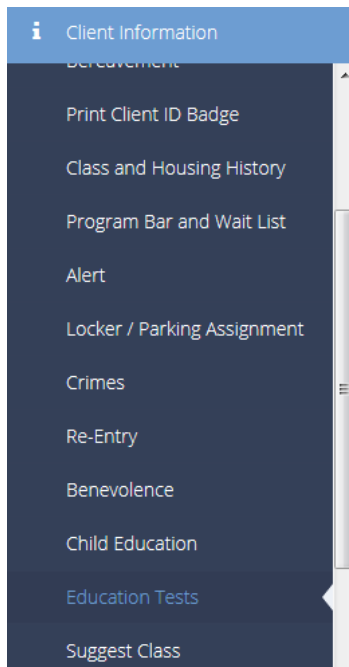
Child Education Courses Summary

Course Category

Total Rows: 9

	Course	
<input checked="" type="checkbox"/>	English	
<input type="checkbox"/>	Math	
<input type="checkbox"/>	US History	
<input type="checkbox"/>	Soccer	
<input type="checkbox"/>	Pre-algebra	
<input type="checkbox"/>	Algebra	
<input type="checkbox"/>	Literature - Contemporary	
<input type="checkbox"/>	Psychology	
<input type="checkbox"/>	Test	

## 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.

**Education Test Summary**

**+ Add New**

Description	Date	Grade	Score	Case Note
English	3/4/2015	A	100.00	

**Add New**

**Education Tests**

Description	Test Date *	Grade *	Score
Abdomen (includes Hernia)			0.00
<input checked="" type="checkbox"/> Admission Nuclear Physics	<input type="text"/>	<input type="text"/>	<input type="text"/>
AIDS			0.00
Alcohol			0.00
Amphetamines			0.00
Aptitude			0.00


Case Note Case Note

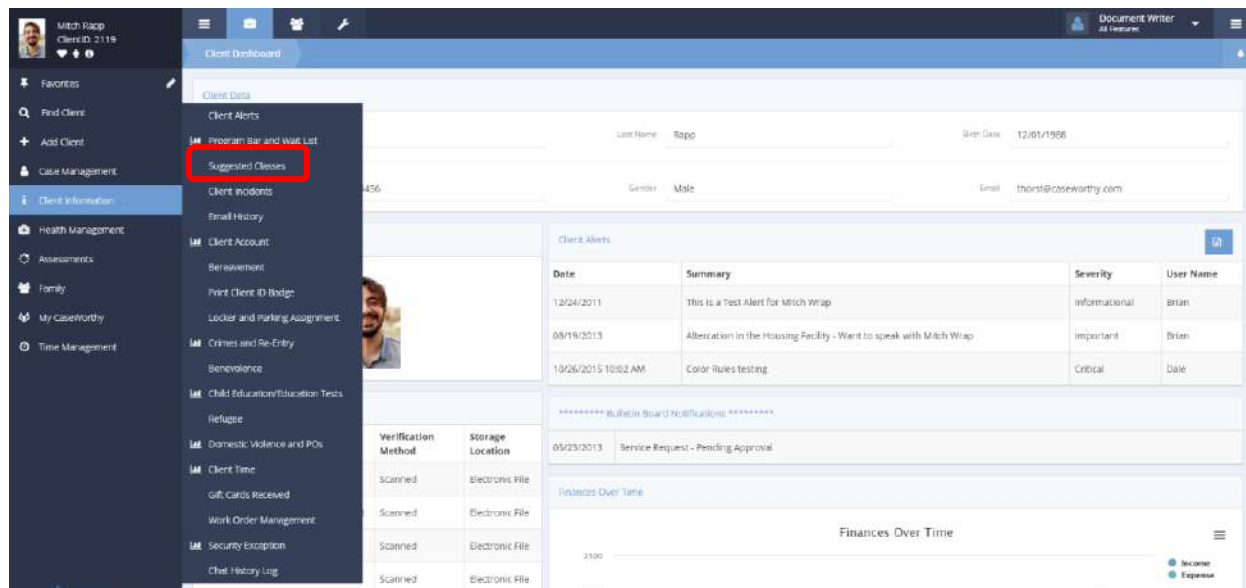
Restriction Shared

## 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  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.

Usage	Program	Start Date	End Date	Client *	Check Client In?
<input checked="" type="checkbox"/> ESL	12 Permanent Housing for Homeless Disabled			Rapp, Mitch	
<input checked="" type="checkbox"/> Computer Class	12 Permanent Housing for Homeless Disabled			Rapp, Mitch	
<input checked="" type="checkbox"/> Computer Training	12 Permanent Housing for Homeless Disabled			Rapp, Mitch	
<input checked="" type="checkbox"/> Skill Building	12 Permanent Housing for Homeless Disabled			Rapp, Mitch	
<input checked="" type="checkbox"/> YAGA Student Skills	2 YAGA			Rapp, Mitch	
<input checked="" type="checkbox"/> ATODs Training	2 YAGA			Rapp, Mitch	
<input checked="" type="checkbox"/> Alternate Activities for families	2 YAGA			Rapp, Mitch	
<input checked="" type="checkbox"/> ATODs	2 YAGA			Rapp, Mitch	
<input checked="" type="checkbox"/> YAGA Student Skills	2 YAGA			Rapp, Mitch	
<input checked="" type="checkbox"/> ATODs Training	2 YAGA			Rapp, Mitch	
<input checked="" type="checkbox"/> Alternate Activities for families	2 YAGA			Rapp, Mitch	
<input checked="" type="checkbox"/> ATODs	2 YAGA			Rapp, Mitch	

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

<input checked="" type="checkbox"/> YAGA Student Skills	2 YAGA		12/31/9999	Rapp, Mitch	
<input checked="" type="checkbox"/> ATODs Training	2 YAGA			Rapp, Mitch	

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

The screenshot shows the CaseWorthy Client Dashboard for a client named Mitch Wrap. The left sidebar contains a navigation menu with the following items: Favorites, Find Client, Add Client, Case Management, Client Information, Health Management, Assessments (highlighted), Family, My CaseWorthy, and Time Management. Under the 'Assessments' tab, a sub-menu is displayed with the following items: Fragility, Child Care, Financials, Employment, Housing, Placements, Inspections and Retention, VI SPDAT and SPDAT, ASR, Child Abuse Risk, CDBG Disaster, Food Pantry, Outcomes, Rent Calculation, Self Sufficiency Matrix, Spirituality, Transportation, Weatherization, Housing Counseling, MDST/OST Screening Tool, Rent Calculation 2015, Meals on Wheels, and Domestic Violence (highlighted with a red box). The main content area shows client information (Last Name: Wrap, Birth Date: 12/01/1988, Gender: Male, Email: thorst@caseworthy.com), Client Alerts (a table with columns Date, Summary, Severity, and User Name), Bulletin Board Notifications, and a Finances Over Time chart.

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

DVS Assessment Summary				+ Add New
Assessment Date	Program	Assessment Event	Date of Most Recent Incident	
9/13/2017	Work Therapy Program	During	9/5/2017	


To add a new domestic violence assessment, click the **+ Add New** button.

The DVS Assessment form appears.

The screenshot displays the 'DVS Assessment' form. At the top, a blue header bar contains the title 'DVS Assessment' and a small icon. Below the header, a blue bar indicates 'No assessment selected.' with a dropdown arrow. The form is organized into several sections:

- Assessment:** Includes a 'Date of most recent incident' with a calendar icon, a 'Nature of abuse' dropdown menu (currently showing 'Choose Options...'), and a text area for 'Most recent incident description'.
- General information:** Contains questions about whether drugs/alcohol were involved, if information was given regarding victim compensation, if the police department was involved, if charges were filed, and if medical attention was required. Each question has a dropdown menu.
- Humane League information:** Contains questions about the need for assistance in boarding pets and if all shots/immunizations are up to date. Each question has a dropdown menu.

At the bottom right of the form, there are two buttons: 'Save' (with a document icon) and 'Cancel' (with a close icon).

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

## Protection Orders



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

Protection Order Summary				
Total Rows: 1				
<div> <div>+</div> <div>Add New</div> </div>				
Applied For Date	Begin Date	Victimization Type	PO Type	Case Note
3/5/2015 12:00:00 AM	3/6/2015	Domestic Violence	Restraining	

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

Add New

Enter Protection Order

Enter the protection order date information for this client. If a denied date is entered, the begin and end dates will not be available.

Order Number

Applied For Date \*

Begin Date

Denied Date

End Date

Enter the type of victimization and protection order information for the client. Expand on the details through the use of the case note feature.

Victimization Type

PO Type

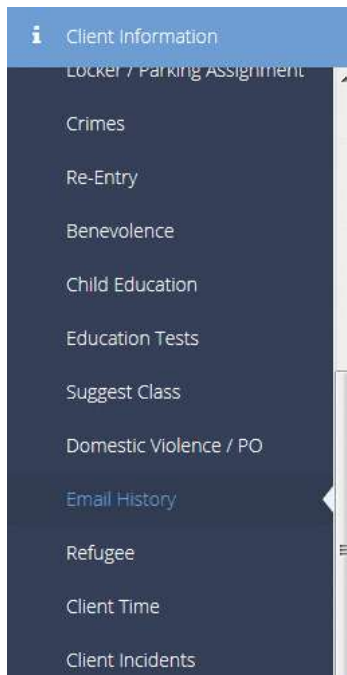
Case Note and Restriction Information


Case Note

Restriction

Upload Protection Orders


## Email History



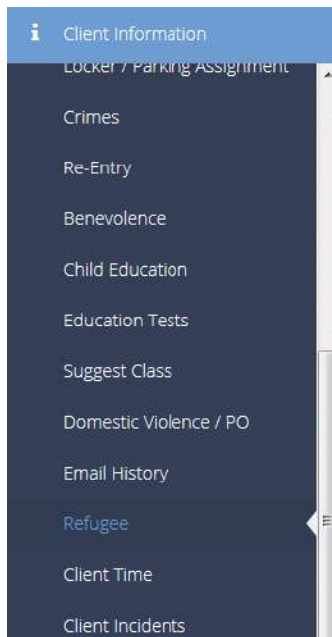
The next item in the Client Information menu group is the "Email History" summary form. This form displays all emails sent on behalf of a client. Click the  **View Email** button to view the email in a pop-up window.



The screenshot shows the 'Email History' summary form. At the top, there is a tab labeled 'Client Emails'. Below the tab, it says 'Total Rows: 22'. The main content is a table with the following columns: 'Email Date', 'Subject', 'Sent From', 'Sent To', and 'View Email'. The table contains 7 rows of data, all with the subject 'Issue Management' and sent from 'jtjoe@caseWorthy.com' to 'jtjoe@caseWorthy.com'. The 'View Email' column contains a button with an envelope icon and the text 'View Email'. The first button is highlighted with a red rectangle.

Email Date	Subject	Sent From	Sent To	View Email
2/18/2015 5:16 AM	Issue Management	jtjoe@caseWorthy.com	jtjoe@caseWorthy.com	 View Email
2/18/2015 4:33 AM	Issue Management	jtjoe@caseWorthy.com	jtjoe@caseWorthy.com	 View Email
2/18/2015 4:33 AM	Issue Management	jtjoe@caseWorthy.com	jtjoe@caseWorthy.com	 View Email
2/18/2015 4:33 AM	Issue Management	jtjoe@caseWorthy.com	jtjoe@caseWorthy.com	 View Email
2/18/2015 4:33 AM	Issue Management	jtjoe@caseWorthy.com	jtjoe@caseWorthy.com	 View Email
2/18/2015 4:33 AM	Issue Management	jtjoe@caseWorthy.com	jtjoe@caseWorthy.com	 View Email
2/18/2015 3:33 AM	Issue Management	jtjoe@caseWorthy.com	jtjoe@caseWorthy.com	 View Email

## 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 [+ Add New](#) button on the summary form.

A screenshot of the 'Refugee Intake Summary' form. At the top right, there is a red button with a white plus sign and the text '+ Add New'. Below the header, it says 'Total Rows: 1'. The table has six columns: 'Intake Date', 'US Arrival Date', 'Alien Reference ID', 'Refugee Status', 'English Language Level', and 'Case Note'. The first row contains the following data: '3/6/2015 9:49:00 AM', '3/6/2015', an empty cell, 'Refugee', 'Advanced', and an empty cell.

Intake Date	US Arrival Date	Alien Reference ID	Refugee Status	English Language Level	Case Note
3/6/2015 9:49:00 AM	3/6/2015		Refugee	Advanced	

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

**Add Refugee Intake**

**Personal Information**

Date Arrival in the US: 03/06/2015  
Date of Arrival in Local Area:   
Refugee Status:   
Country of Origin:   
Native Language:   
Case Reference Number:   
A Number:   
US Tin Name:   
State of Orig Settlement:

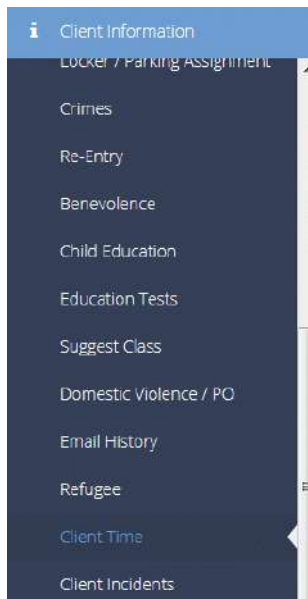
**English Language Skills**

English Language Level:   
Reads English:   
Writes English:   
Speaks English:

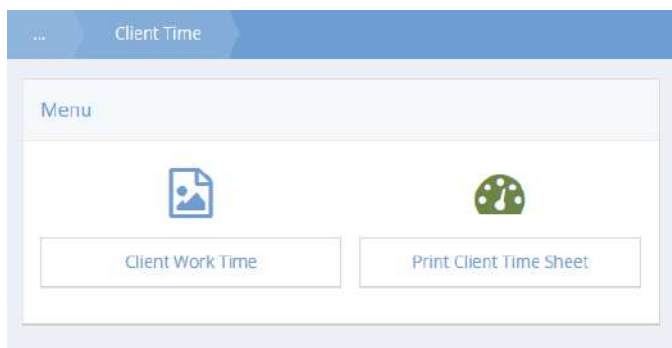
**Case Note and Restriction Information**

Case Note: [Case Note](#) Restriction: Shared

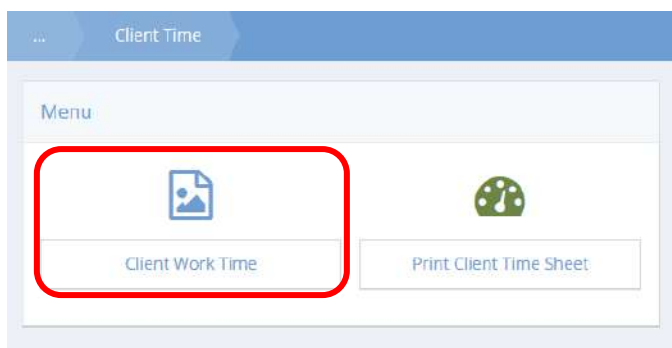
## Client Time



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						
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.

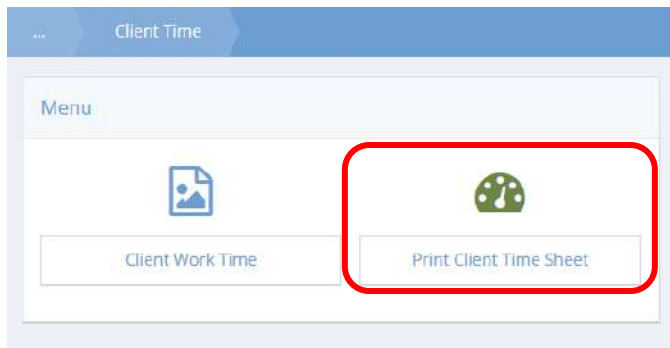
Work Start Date *	Work End Date *
Time Type *	Job Code *
Hours Worked *	
Rate *	
Gross Pay Calculator	Record Gross Pay
Case Note and Restriction	
Case Note *	Restriction *

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.

A screenshot of a form titled "Print Entity Time Sheet". The form has a blue header bar with the title. Below the header, there is a section titled "Select the desired range of dates for the time report". This section contains a "Client Name" dropdown menu, a "Pay Period Begin Date" field with a calendar icon, and a "Pay Period End Date" field with a calendar icon. Below this section is another section titled "Other Print Options: Select 'Time In' and 'Time Out' if the data is captured and that level of detail is desired. Select the 'Rate' and 'Amount' if the standard calculation of hours multiplied by rate is desired." This section contains two checkboxes: "Print 'Time In' and 'Time Out' Columns" and "Print 'Rate' and 'Amount' Columns?".

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

\_\_\_\_\_

Client Name

Signature

\_\_\_\_\_

Date

Signature

\_\_\_\_\_

Case Manager

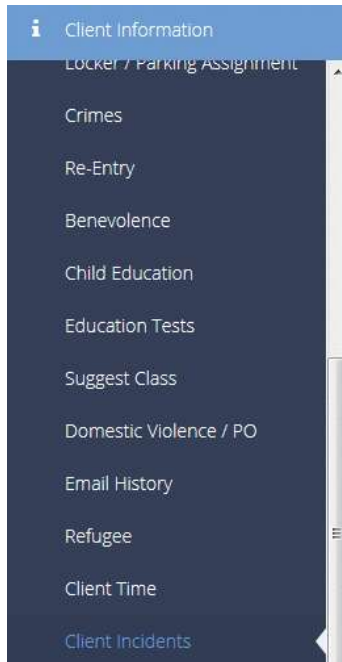
Signature

\_\_\_\_\_

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.

Client Incident Report Summary			
Severity <span>▼</span>			
Incident Date & Time	Incident Summary	Provider / Resource	Severity
4/22/2015 3:01 PM	tst	CaseWorthy / Incident location	Low
4/22/2015 2:59 PM	test	CaseWorthy / Incident location	LOW

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


Client Incident Report Summary			
Severity <span>▼</span>			
<div> <div>Incident Summary</div> <div> <div>Low</div> <div>Medium</div> <div>High</div> <div>Transfer to CM</div> <div>Issued to Client</div> </div> </div>			
Incident Date & Time	Incident Summary	Provider / Resource	Severity
4/22/2015 3:01 PM	tst	CaseWorthy / Incident location	Low
4/22/2015 2:59 PM	test	CaseWorthy / Incident location	LOW


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

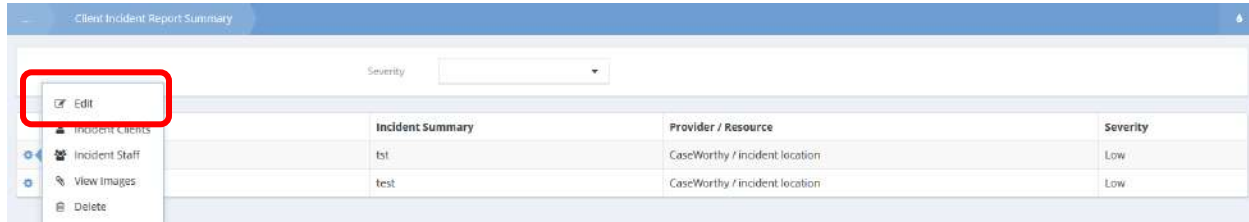


Client Incident Report Summary

Severity:


	Incident Summary	Provider / Resource	Severity
 Edit			
 Incident Clients	tst	CaseWorthy / incident location	Low
 Incident Staff	test	CaseWorthy / incident location	Low
 View Images			
 Delete			

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

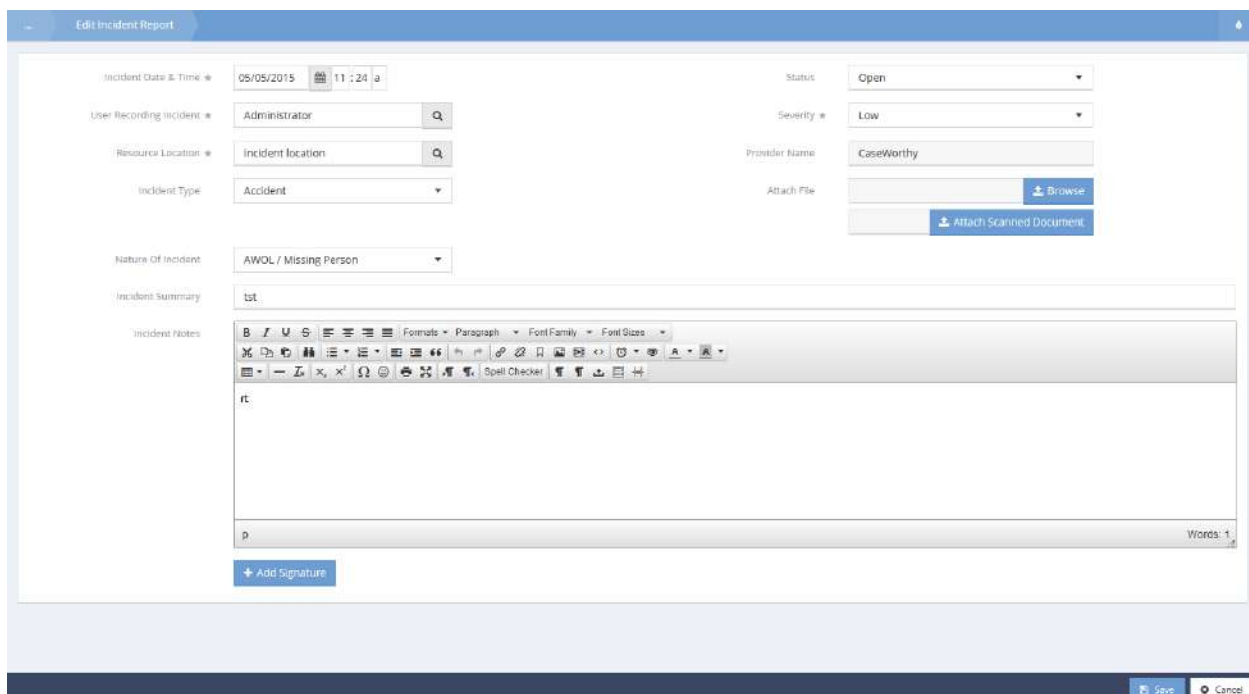


Client Incident Report Summary

Severity:

	Incident Summary	Provider / Resource	Severity
 Edit			
 Incident Clients	tst	CaseWorthy / incident location	Low
 Incident Staff	test	CaseWorthy / incident location	Low
 View Images			
 Delete			

Make any changes and click  Save when finished.



Edit Incident Report

Incident Date & Time: 05/05/2015 11:24 a

User Recording Incident: Administrator

Resource Location: Incident location

Incident Type: Accident

Nature Of Incident: AWOL / Missing Person


Incident Summary: tst


Incident Notes: rt

Status: Open


Severity: Low



Provider Name: CaseWorthy

Attach File:  Browse

Attach Scanned Document:  Attach Scanned Document

Words: 1

 Add Signature

 Save  Cancel

## Excused Absence

### View Approval History

**Objective:** View the history of excused absence approval requests.

Resource Absence Management							
Clientes: Nueva							
+ Add New							
Begin Date	End Date	Reason	Absence Type	Program Staff	Scheduler	Supervisor	Status
7/1/2015 9:22 AM	7/3/2015 12:00 AM	Forgot/Overslept	Work / Shift Release				Pending

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

Absence Management (input)

Request Begin Date/Time: 07/01/2015 09:26 AM

Request End Date/Time: 12:00 AM

Client Name: [Search]

Emergency Contact: [Search]

Reason: [Dropdown]

Absence Type ID: [Dropdown]

Location: [Dropdown]

Resource: [Dropdown]

Usage: [Dropdown]

Approval Process: [Dropdown]

Absence Note: [Rich Text Editor]


Who needs to be notified about the client's leave request?

Scheduler: [Search]

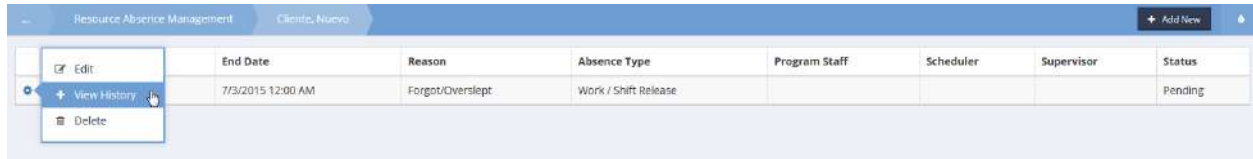
Program Staff: [Search]

Client Direct Supervisor: [Search]

Restriction: Shared

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.



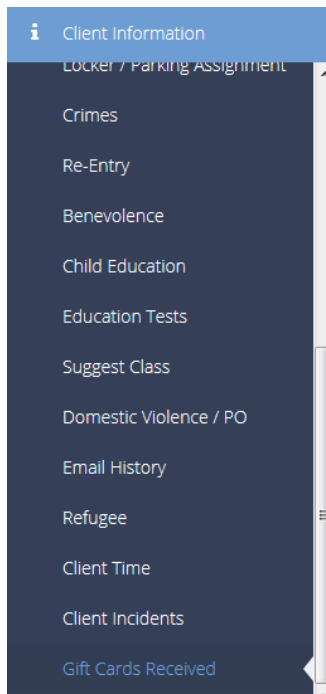
	End Date	Reason	Absence Type	Program Staff	Scheduler	Supervisor	Status
<div><div>Edit</div><div>View History</div><div>Delete</div></div>	7/3/2015 12:00 AM	Forgot/Overslept	Work / Shift Release				Pending

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



ApprovalID	Date	Created By	Description	Step	Reason
32957	7/1/2015 9:24 AM	Ellason, Adrian	Pending	2 Step Approval	Pending

## Gift Cards Received



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

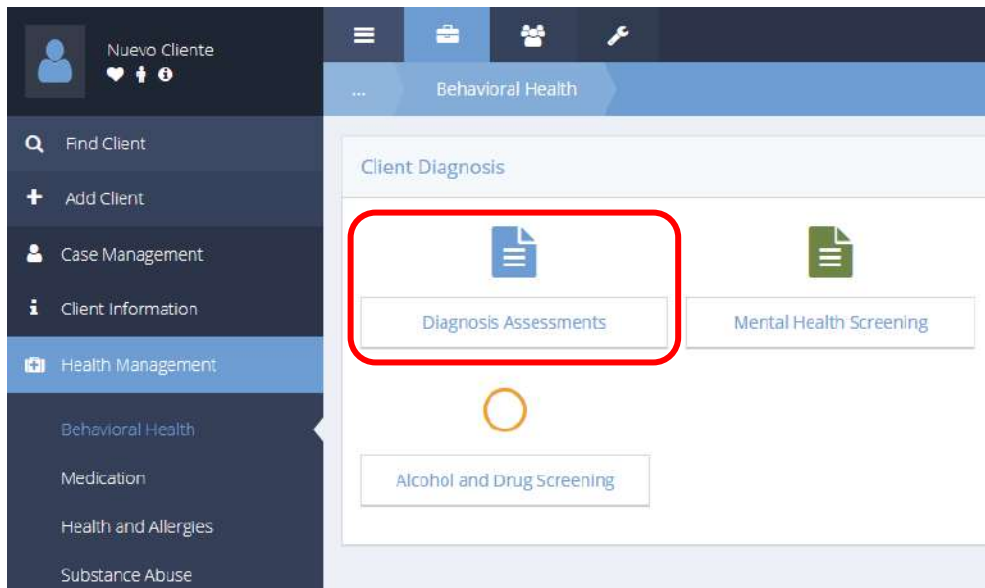
Client Gift Cards						
🔍 Gift cards provided to clients.						
Total Rows: 1						
Date	Trans. Type	Description	Serial Number	Case Manager	Incentive	Amount
5/5/2015	Issued to Client	test gift card	109	Test QA		\$10.00

## Health Management

### Behavioral Health

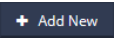
### Mental Health Diagnosis

**Objective:** Complete a Mental Health Diagnosis.



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

Mental Health Diagnosis Summary									
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		
1/8/2015	13 Safe Haven	During	100.01				0		

To add a new assessment, click on  button.



The Mental Health Diagnosis Codes Axis Four form displays.

Mental Health Diagnosis Codes Axis Four

Assessment: No assessment selected.

Primary:

Secondary:

Tertiary:

Quaternary:

GAF Score:

Primary ICD 9 Code:

Secondary ICD 9 Code:

Tertiary ICD 9 Code:

Quaternary ICD 9 Code:

Issue Description *	Answer *
<input checked="" type="checkbox"/> Problems with Primary Support Group	No
<input checked="" type="checkbox"/> Educational Problems	No
<input checked="" type="checkbox"/> Problems Related to the Social Environment	No
<input checked="" type="checkbox"/> Occupational Problems	Yes
<input checked="" type="checkbox"/> Housing Problems	No
<input checked="" type="checkbox"/> Economic Problems	No
<input checked="" type="checkbox"/> Problems with Access to Health Care Services	No
<input checked="" type="checkbox"/> Problems related to interaction with Legal System	No
<input checked="" type="checkbox"/> Other Psychosocial and Environmental Problems	No
<input checked="" type="checkbox"/> Problems with Primary Support Group	No

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.

Assessment: No assessment selected.

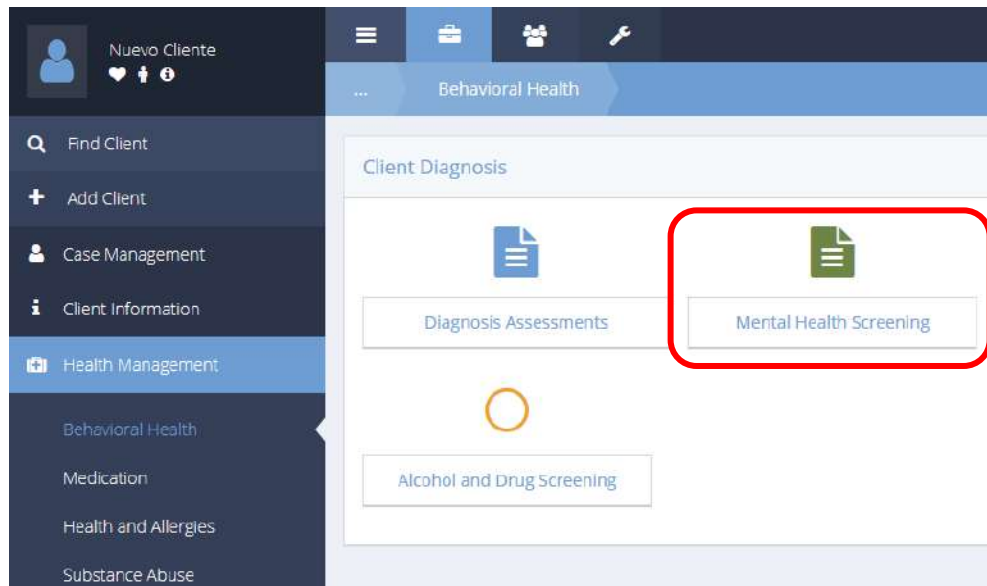
[+ New Assessment](#) [Copy Current Assessment](#) [Copy Assessments](#) [Edit Date/Restriction](#)

Date	Program	Type	
12/31/2014	13 Safe Haven	At Entry	<input type="button" value="Calendar"/>
12/31/2014	CC Immigration	At Entry	<input type="button" value="Calendar"/>

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

Assessment Date	Program	Created By	Screen Total
12/12/2014	1 English for Employment	neliason	0

To create a new Mental Health assessment, click the **+ Add New** 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?
6. 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, troubling 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: 0

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.

Assessment

No assessment selected.

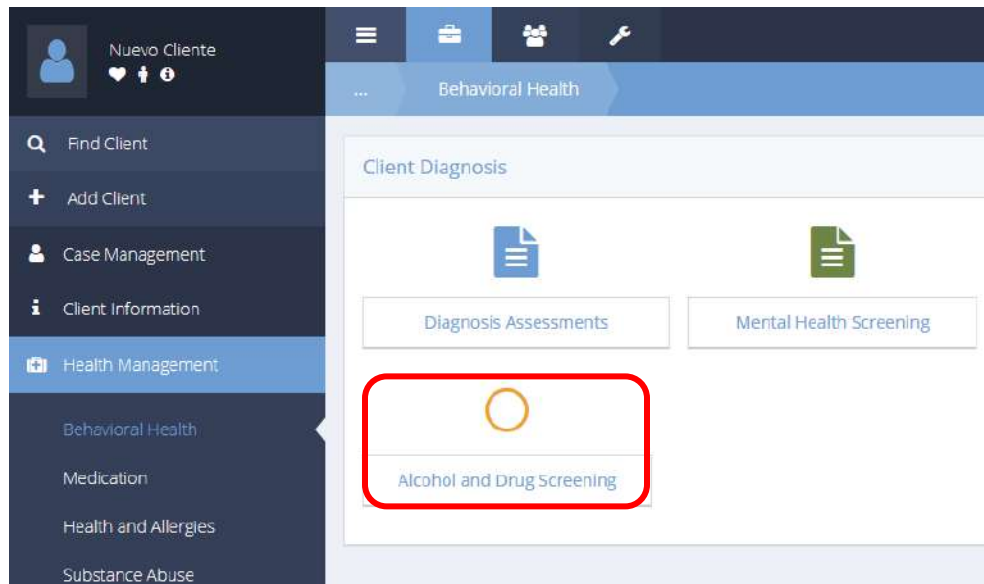
[+ New Assessment](#) [Copy Current Assessment](#) [Copy Assessments](#) [Edit Date/Restriction](#)

Date	Program	Type	
12/31/2014	13 Safe Haven	At Entry	
12/31/2014	CC Immigration	At Entry	

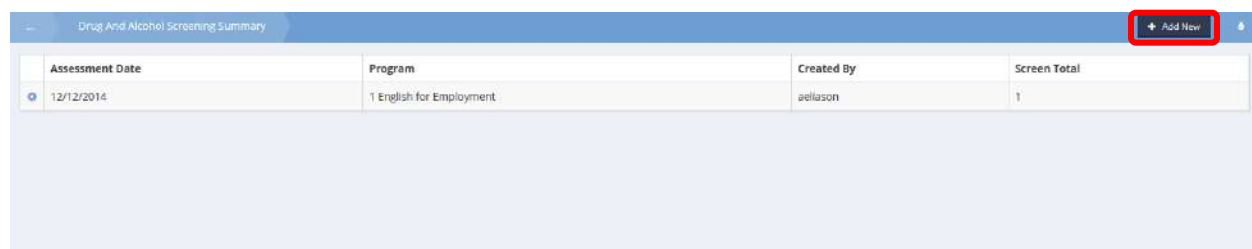
Once the existing assessment is selected or a new assessment is started, answer all the assessment questions. The "Total Score" field auto-populates based upon the answers provided on the form. Click on the Save button when finished.

## 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.

The screenshot shows the 'Drug and Alcohol Screening Assessment' form. At the top, there is a blue header bar with the title 'Drug and Alcohol Screening Assessment' and a user icon. Below the header, the form is divided into two main sections: 'During past 6 months' and 'Not limited to the past 6 months'. The 'During past 6 months' section contains a dropdown menu for 'Assessment' with the text 'No assessment selected.' Below this, there are several questions with dropdown menus for answers, mostly set to 'No'. The questions include: 'Have you used alcohol or other drugs?', 'Have you felt that you use too much alcohol or drugs?', 'Have you had any of the following?' (with a list box), 'Have you tried to cut down or quit drinking or using alcohol or other drugs?', 'Have you gone to anyone for help because of your drinking or drug use?', 'Has drinking or other drug use caused problems between you and your family or friends?', 'Has your drinking or other drug use caused problems at school or at work?', 'Have you been arrested or had other legal problems?', 'Have you lost your temper or gotten into arguments or fights while drinking or using drugs?', 'Are you needing to drink or use drugs more and more to get the effect you want?', 'Do you spend a lot of time thinking about or trying to get alcohol or other drugs?', 'When drinking or using drugs, are you more likely to do something you wouldn't normally do?', and 'Do you feel bad or guilty about your drinking or drug use?'. Below these questions is another dropdown menu for 'Alcohol and Drug Screening'. The 'Not limited to the past 6 months' section contains three questions with dropdown menus for answers, all set to 'No': 'Have you ever had a drinking or other drug problem?', 'Have any of your family members ever had a drinking or drug problem?', and 'Do you feel that you have a drinking or drug problem now?'. At the bottom of the form, there is a section for 'Total Score' with a label 'Total Score' and a value '0.00'. The form is set against a light blue background with white text and dropdown menus.

Drug and Alcohol Screening Assessment

During past 6 months

Assessment: No assessment selected.

Have you used alcohol or other drugs? No

Have you felt that you use too much alcohol or drugs? No

Have you had any of the following? Choose Options...

Have you tried to cut down or quit drinking or using alcohol or other drugs? No

Have you gone to anyone for help because of your drinking or drug use? No

Has drinking or other drug use caused problems between you and your family or friends? No

Has your drinking or other drug use caused problems at school or at work? No

Have you been arrested or had other legal problems? No

Have you lost your temper or gotten into arguments or fights while drinking or using drugs? No

Are you needing to drink or use drugs more and more to get the effect you want? No

Do you spend a lot of time thinking about or trying to get alcohol or other drugs? No

When drinking or using drugs, are you more likely to do something you wouldn't normally do? No

Do you feel bad or guilty about your drinking or drug use? No

Alcohol and Drug Screening: Choose Options...

Not limited to the past 6 months

Have you ever had a drinking or other drug problem? No

Have any of your family members ever had a drinking or drug problem? No

Do you feel that you have a drinking or drug problem now? No

Total Score not including "Alcohol and Drug Screening" and "Have you had any of the following"

Total Score: 0.00

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.

Assessment

No assessment selected.

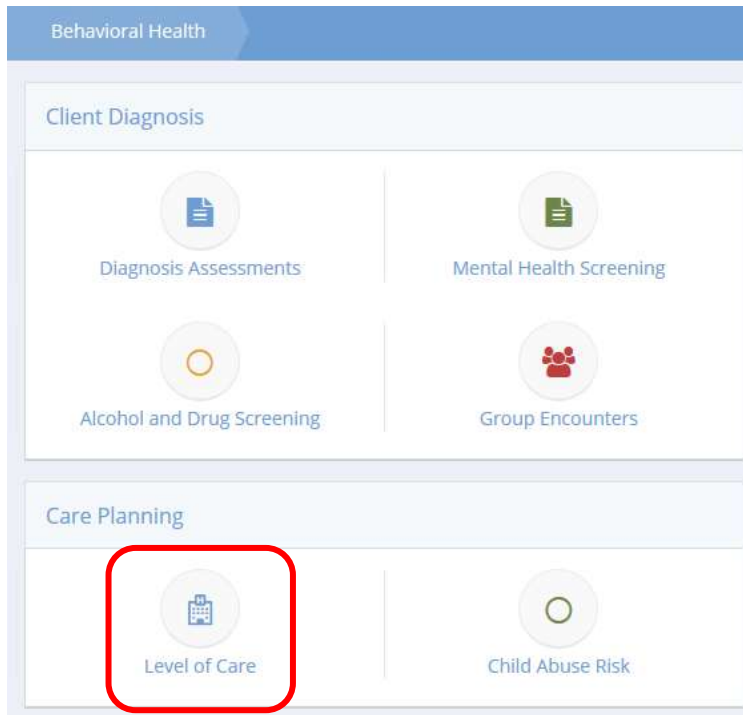
[+ New Assessment](#) [Copy Current Assessment](#) [Copy Assessments](#) [Edit Date/Restriction](#)

Date	Program	Type	
12/31/2014	13 Safe Haven	At Entry	
12/31/2014	CC Immigration	At Entry	

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.

The screenshot shows the 'Level of Care Assessment Summary' table. The table has four columns: 'Assessment Date', 'Program', 'Event', and 'System ID'. The first row is highlighted with a red box. The 'Add New' button in the top right corner is also highlighted with a red box.

Assessment Date	Program	Event	System ID
1/16/2015	Common Intake	During	11317
1/21/2015	Common Intake	During	11329

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.



Level of Care Data

Eligibility Specialist

Assessment \* No assessment selected.

Developmental Disability Eligibility \* [Dropdown]

Significant Impairments in Adaptive Behavior \* Choose Options... [List Box]

Eligibility Specialist Initial \* [Text Box]

Eligibility Diagnosis \* [Dropdown]

Date \* [Text Box]

Level of Care Assessment

Vision function with correction, if needed [Dropdown]

Hearing function with correction, if needed [Dropdown]

Self Care [Dropdown]

Personal Mobility [Dropdown]

Communication - Expressive (check all that apply) Choose Options... [List Box]

Hearing Comments [Text Box]

Self Care Comments [Text Box]

Personal Mobility Comments [Text Box]

Expressive Communication Comments [Text Box]

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

Assessment \*

No assessment selected.

**+ New Assessment** Copy Current Assessment Copy Assessments Edit Date/Restriction

Date	Program
6/5/2015	Mercy Housing Program
5/6/2015	TEST Program
5/6/2015	TEST Program
5/5/2015	TEST Program
5/1/2015	Employment Job Match Program

The New Assessment form displays.

New Assessment

New Assessment


Enrollment \*

Assessment Type \*

Assessment By \* aeliason

Assessment Begin Date

Restriction \*

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

Eligibility Specialist

Assessment \* 5/6/2015 - TEST Program - During

Developmental Disability Eligibility \*

Eligibility Diagnosis \*

Significant Impairments in Adaptive Behavior \* Choose Options...

Eligibility Specialist Initial \*

Date \*


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.

Level of Care Data

Level of Care Assessment

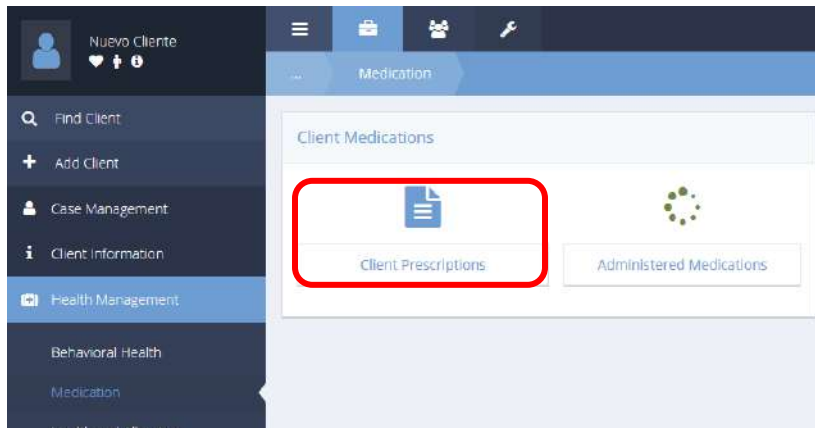
Vision function with correction, if needed	<input type="text"/>		
Hearing function with correction, if needed	<input type="text"/>	Hearing Comments	<input type="text"/>
Self Care	<input type="text"/>	Self Care Comments	<input type="text"/>
Personal Mobility	<input type="text"/>	Personal Mobility Comments	<input type="text"/>
Communication - Expressive (check all that apply)	<div>Choose Options ... <input type="text"/> <input type="text"/> <input type="text"/></div>	Expressive Communication Comments	<input type="text"/>
Communication - Receptive	<div>Choose Options ... <input type="text"/> <input type="text"/> <input type="text"/></div>	Receptive Communication Comments	<input type="text"/>
Toileting Assists (check all that apply)	<div>Choose Options ... <input type="text"/> <input type="text"/> <input type="text"/></div>	Toileting Assists Comments	<input type="text"/>
Medical Needs	<input type="text"/>	Medical Needs Comments	<input type="text"/>

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

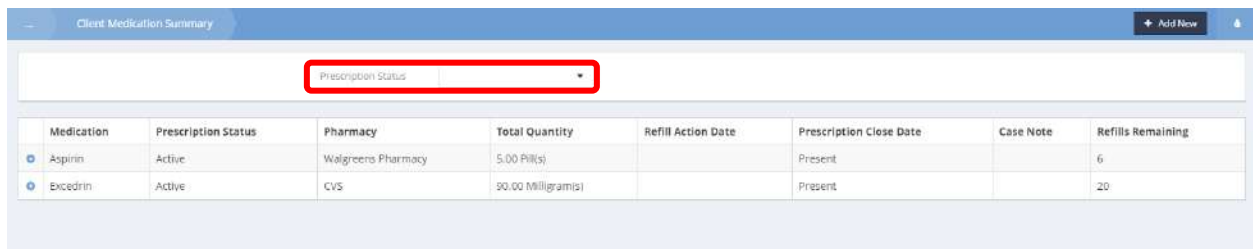
## Medication

### Client Prescriptions

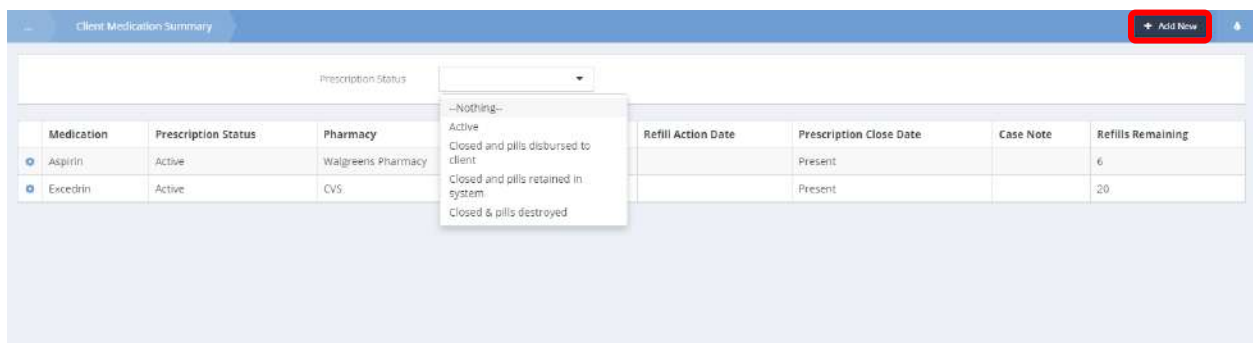
**Objective:** Manage client prescriptions. Includes adding new prescriptions, editing existing prescriptions, and managing refills.



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 **+ Add New** button.

The Add Client Prescription form displays.

Add New


Medication \* Pharmacy \* RX Number \* Doctor \* Quantity per Refill \* Unit of Measure \* Current Quantity \* Refills Remaining \*

Dispense Quantity \* Dispense Unit of Measure \* Dispense Schedule \* Choose Options...

Prescription Status \* Active \* Prescription Begin Date: 12/08/2014 \* Prescription Close Date: Present \*

Medication	Pharmacy	RX Number	Quantity per Refill	Unit of Measure	Current Quantity	Refills Remaining
Aspirin	Walgreens Pharmacy	12314	5.00	Pill(s)	2	6
Excedrin	CVS	222221	50.00	Milligrams	5	20


Save Cancel

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

Client Medication Summary

Prescription Status: [Dropdown]





Medication	Prescription Status	Pharmacy	Total Quantity	Prescription Close Date	Case Note	Refills Remaining
Aspirin	Active	Walgreens Pharmacy	5.00 Pill(s)	Present		6

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


Client Medication Summary

Prescription Status: [Dropdown]


Medication	Prescription Status	Pharmacy	Total Quantity	Prescription Close Date	Case Note	Refills Remaining
Aspirin	Active	Walgreens Pharmacy	5.00 Pill(s)	Present		6

 Edit  
 Refills  
 Close Prescription  
 Delete

The Client Prescription Edit form displays.

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


Medication	Prescription Status	Pharmacy	Total Quantity	Prescription Close Date	Case Note	Refills Remaining
Aspirin	Active	Walgreens Pharmacy	5.00 Pill(s)	Present		6

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

Medication	Prescription Status	Pharmacy	Total Quantity	Refill Action Date	Prescription Close Date	Case Note	Refills Remaining
Aspirin	Active	Walgreens Pharmacy	5.00 Pill(s)		Present		6
CVS	Active	CVS	90.00 Milligram(s)		Present		20

The Refill form displays.

Refill						
Medication	Refill Status	Dosage Quantity	Refill Qty Remaining	Refill Date	Refill ID	
Aspirin	Complete	1	2	12/5/2014	1136	
Aspirin	Scheduled	1	5	12/6/2014	1140	

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

Refill						
Medication	Refill Status	Dosage Quantity	Refill Qty Remaining	Refill Action Date	Refill ID	
Aspirin	Complete	1	2		1136	
Aspirin	Pending	1	5		1140	

The Medication Refill Edit form displays.


Medication Refill Edit

Quantity per Refill: 5  
This Refill Quantity Remaining: 5  
Unit Of Measure: Pill(s)  
Dosage Quantity: 1  
Dispense Schedule: Choose Options...  
Morning

Original Number of Refills:   
Refill Pharmacy: Walgreens Pharmacy  
Refill Status: Complete

Change Reason  
Edit Reason:

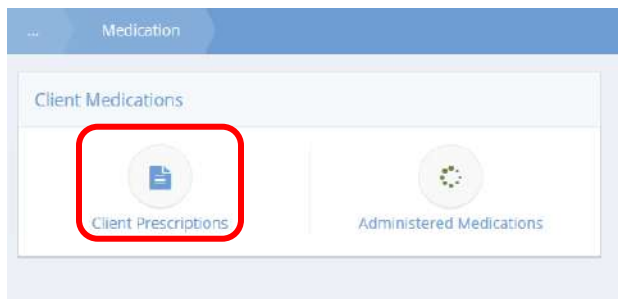
Save Cancel


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

Client Medication Summary

Prescription Status:

Total Rows: 1

Medication	Prescription Status	Pharmacy	Total Quantity	Prescription Close Date	Case Note	Refills Remaining
 Aspirin	Active	CVS	5.00 Pill(s)	4/8/2015		4

Select Edit from the pop-up menu that appears.

Client Medication Summary

Prescription Status:


Total Rows: 1

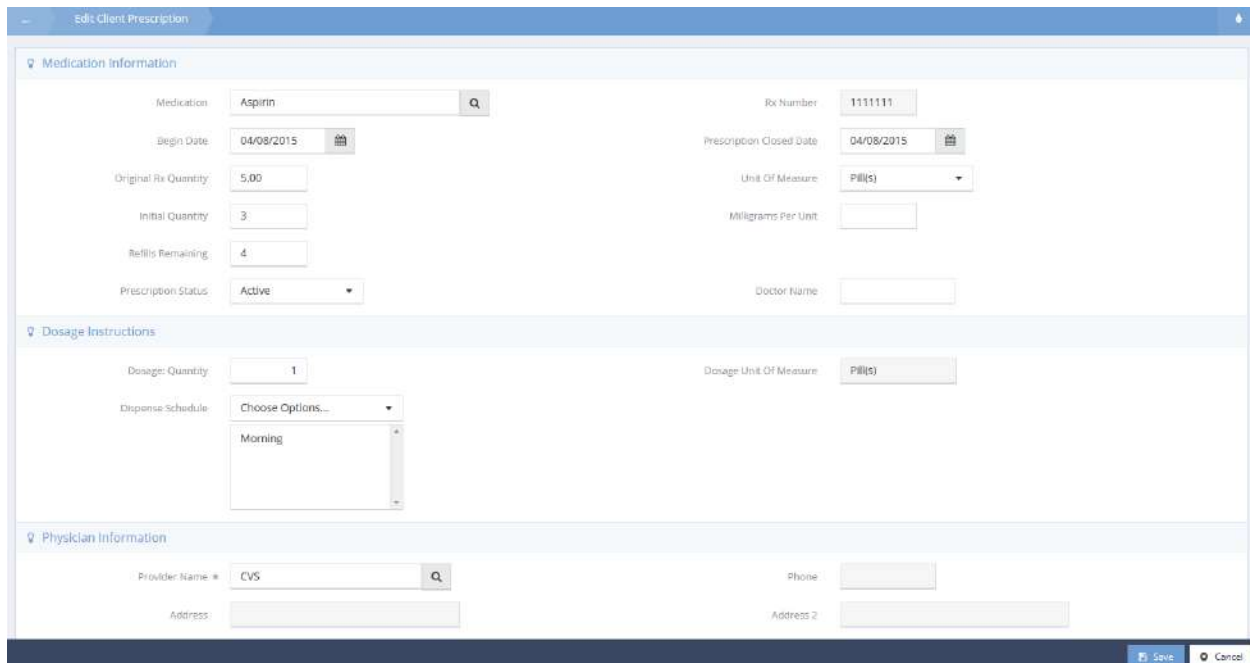
Medication	Prescription Status	Pharmacy	Total Quantity	Prescription Close Date	Case Note	Refills Remaining
 Aspirin	Active	CVS	5.00 Pill(s)	4/8/2015		4

The action menu for the Aspirin row is open, showing the following options: Edit, Refill, Close Prescription, and Delete. The "Edit" option is highlighted with a red rectangular box.



The Medication Edit form displays.

Make any desired changes and click on the  Save button.



**Edit Client Prescription**

**Medication Information**

Medication: Aspirin

Rx Number: 1111111

Begin Date: 04/08/2015

Prescription Closed Date: 04/08/2015

Original Rx Quantity: 5.00

Unit Of Measure: Pill(s)

Initial Quantity: 3

Milligrams Per Unit:

Refills Remaining: 4

Prescription Status: Active

Doctor Name:

**Dosage Instructions**

Dosage Quantity: 1

Dosage Unit Of Measure: Pill(s)

Dispense Schedule: Choose Options...

Morning

**Physician Information**

Provider Name: CVS

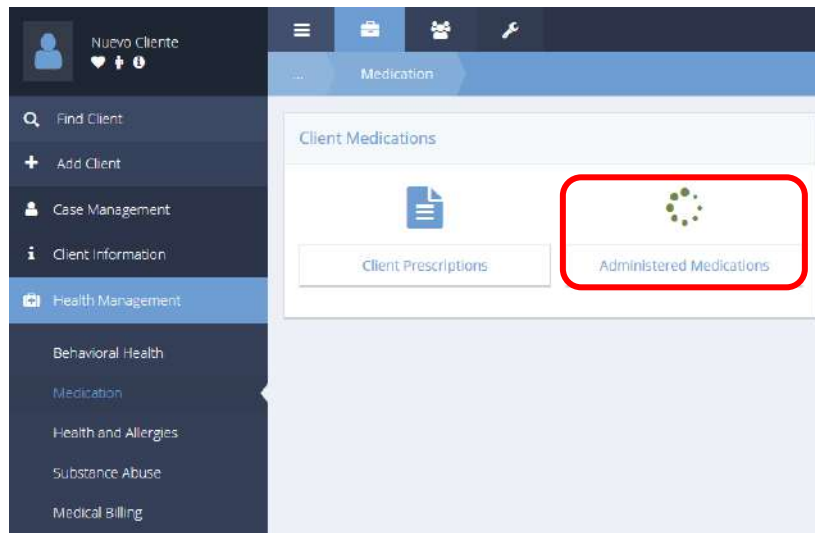
Phone:

Address:

Address 2:

## Administered Medications


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



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

The screenshot shows the 'Administered Medications' form. It has a blue header bar with the title 'Administered Medications' and a search icon. Below the header is a table with the following columns: Medication, Disburse Date, Shift, Administered, and Dosage Quantity. The table contains one row of data for 'Excedrin' administered on '12/5/2014 12:00 PM' at 'Midday' with a dosage of '1'. Below the table is a light blue footer area.

Medication	Disburse Date	Shift	Administered	Dosage Quantity
Excedrin	12/5/2014 12:00 PM	Midday	Yes	1

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

The Edit Administered Medication form displays.

The screenshot shows the 'Edit Administered Medication' form. The form is titled 'Edit Administered Medication' in a blue header bar. The form fields are as follows:

- Discharge Date:** 12/05/2014
- Administered:** Yes (dropdown menu)
- Administered Dosage:** 1 (text input)
- Signature:** A blue button labeled '+ Add Signature'.
- Signature Image:** A small image of a signature.
- Signature Details:** A table showing the signature details.

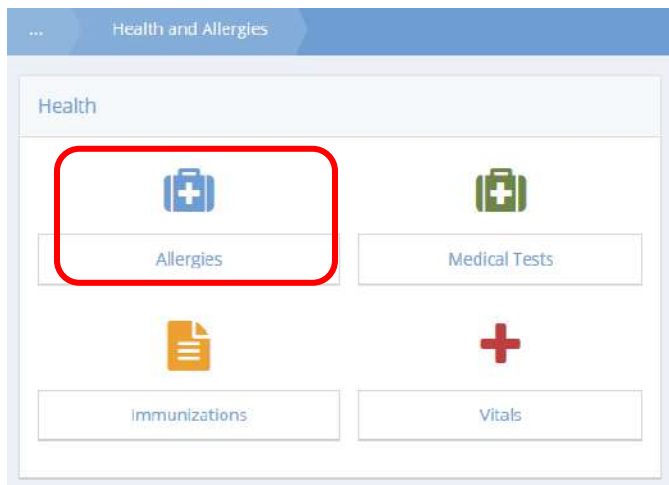
Date	12/05/2014
Name of Signatory	Adrian Elason
Signatory Role/Title	Client

At the bottom right of the form, there are two buttons: 'Save' and 'Cancel'.

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

## Health and Allergies

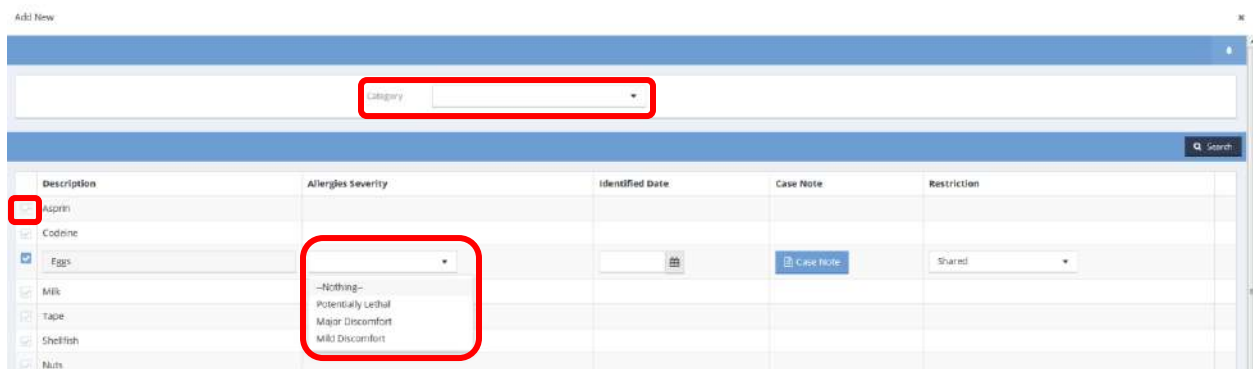
### Allergies



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

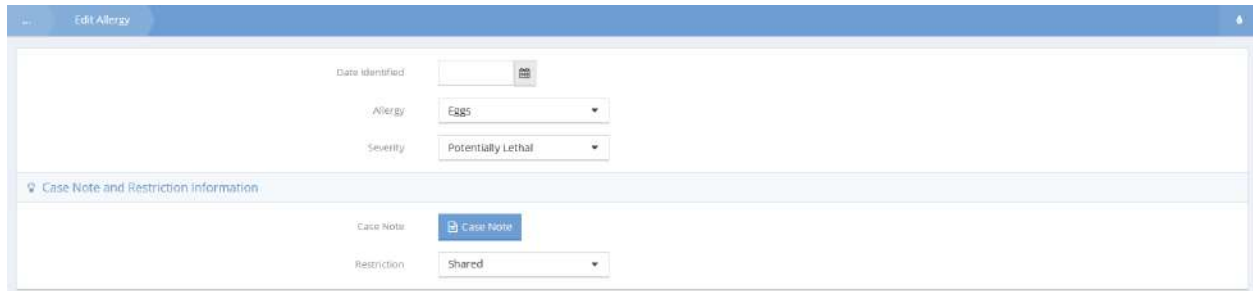


Use the Category drop-down list to filter the list of allergies. To add the desired allergy, click the clear checkbox and select the severity from the drop-down list. Click the **Save** button when finished.




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

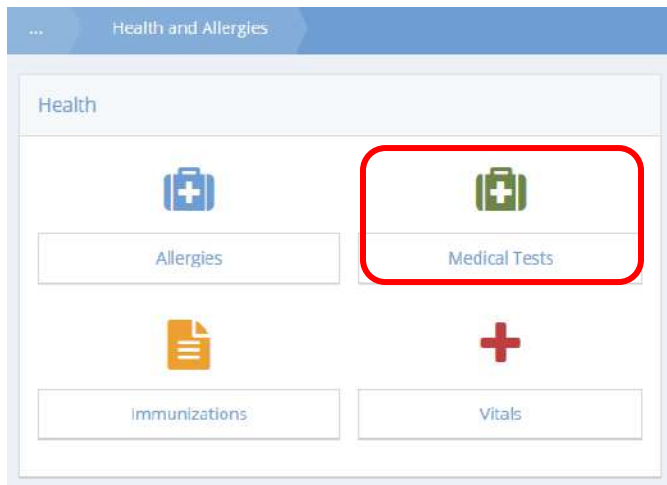
The Edit Allergy form displays.



The screenshot shows the 'Edit Allergy' form. At the top, there is a blue header bar with the text 'Edit Allergy' and a small icon on the right. Below the header, the form is divided into two main sections. The first section contains three fields: 'Date Identified' with a date picker icon, 'Allergy' with a dropdown menu showing 'EGGS', and 'Severity' with a dropdown menu showing 'Potentially Lethal'. The second section is titled 'Case Note and Restriction information' and contains two fields: 'Case Note' with a button labeled 'Case Note' and 'Restriction' with a dropdown menu showing 'Shared'.

Make any desired changes and click  Save when finished.

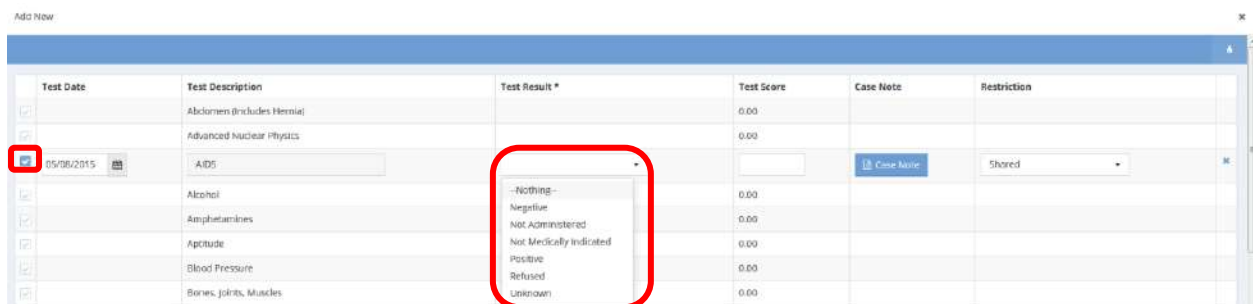
## Medical Tests




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.

Medical Tests Summary

Total Rows: 1 + Add New

	Result	Date	Score	Case Note
<div><div>Edit</div><div>Delete</div></div>	Negative	5/8/2015	0.00	

Make any changes and click  Save when finished.

Edit Test Results

Test Description: AIDS Test Date: 05/08/2015

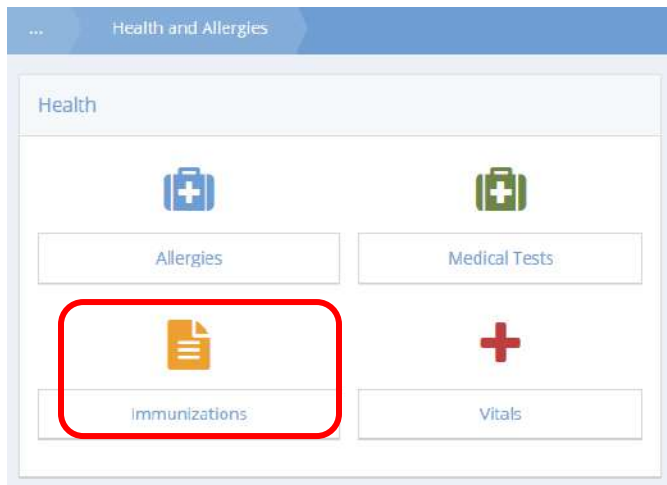
Test Results: Negative Test Score: 0.00

Case Note and Restrictions

Case Note:  Case Note

Restriction: Shared

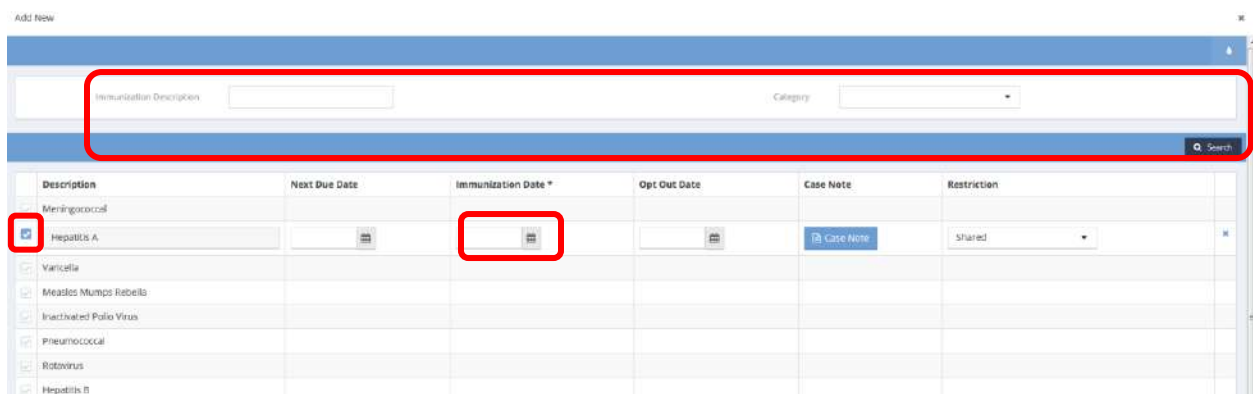
## Immunizations



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



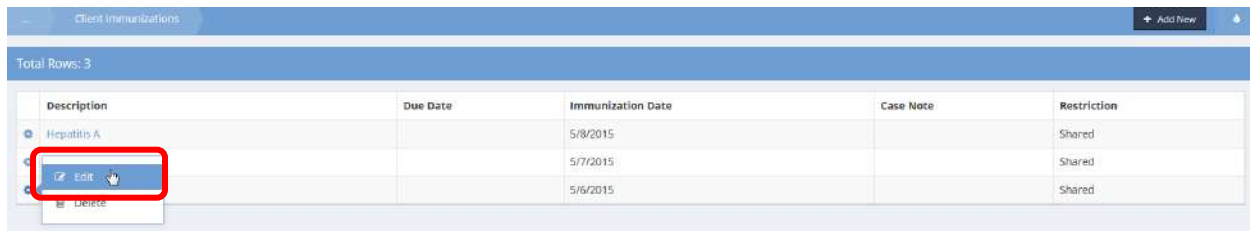
Use the search bar to filter the list of immunizations. To add an immunization, click the clear checkbox ☒ and enter a date. Click the **Save** button when finished.



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



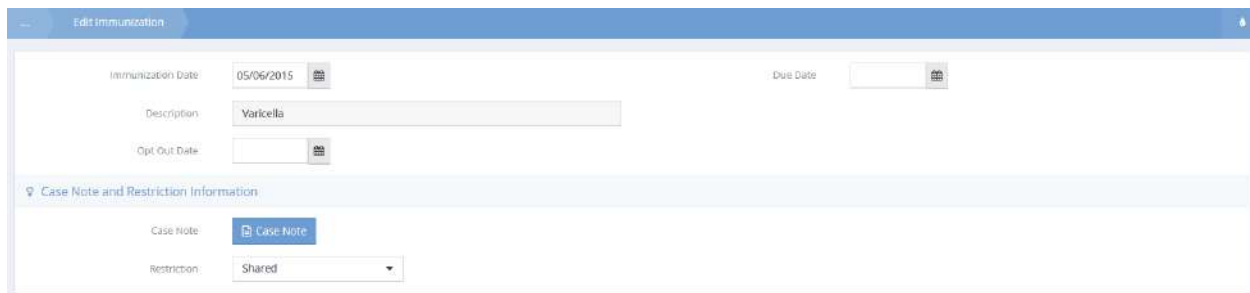
The Edit Immunization form displays.



The screenshot shows a table titled 'Client Immunizations' with a header bar containing a back arrow, the title, and an 'Add New' button. Below the header, it states 'Total Rows: 3'. The table has five columns: Description, Due Date, Immunization Date, Case Note, and Restriction. The first row is for 'Hepatitis A' with an immunization date of 5/8/2015 and a 'Shared' restriction. A red rectangle highlights the 'Edit' button in the first row's Description column.

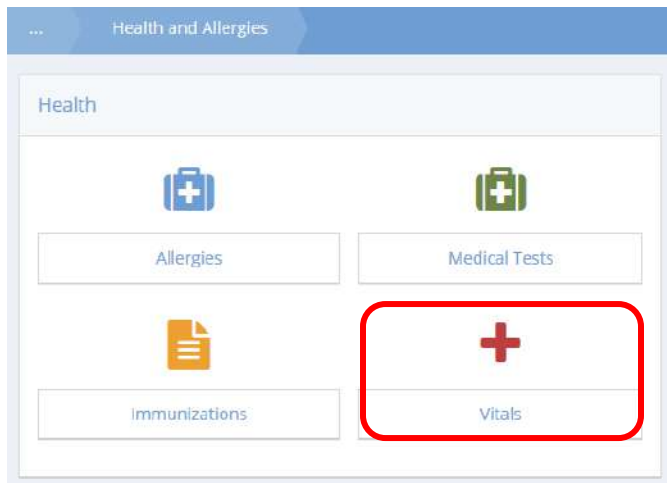
Description	Due Date	Immunization Date	Case Note	Restriction
Hepatitis A		5/8/2015		Shared
		5/7/2015		Shared
		5/6/2015		Shared

Make any changes and click  Save when finished.



The screenshot shows the 'Edit Immunization' form. It has a header bar with a back arrow, the title, and a user icon. The form contains several input fields: 'Immunization Date' (05/06/2015), 'Due Date' (empty), 'Description' (Varicella), and 'Opt Out Date' (empty). Below these is a section titled 'Case Note and Restriction Information' which includes a 'Case Note' button and a 'Restriction' dropdown menu set to 'Shared'.

## 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.

A screenshot of the 'Add New' form for entering vital signs. The form includes fields for Date (05/06/2015), Height, Weight, Temperature (0.0), Heart Rate, Blood Pressure, Respiratory, and Head Circumference. Below these is a section for 'Case Note and Restriction Information' with a 'Case Note' button and a 'Shared' dropdown menu.

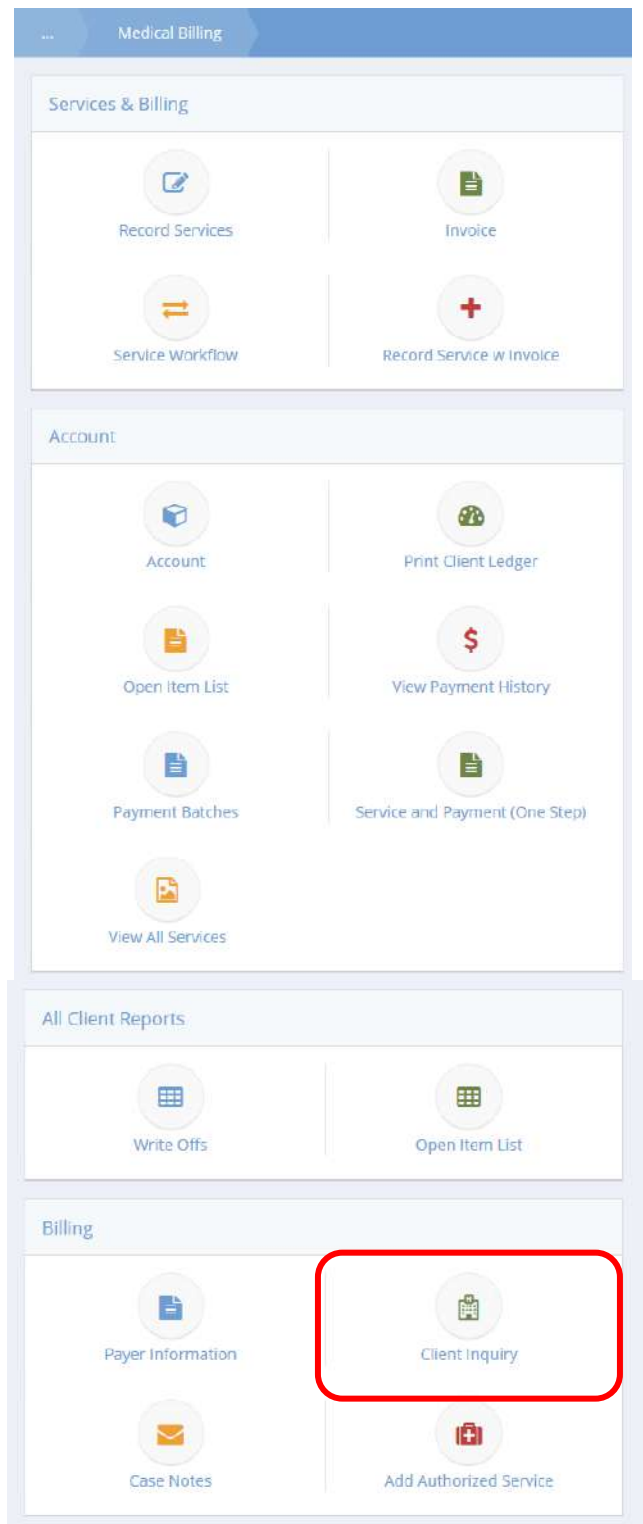
To edit existing vitals, click the action gear  and click Edit. Make any changes and click  when finished.

Client Vitals								+ Add New	
	 Edit	Height	Weight	Heart Rate	Temperature	Blood Pressure	Created By	Case Note	
	Delete	6.4	175			0.0	aeliason		

## 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
 kaillen - 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
 kaillen - 01/08/2015 - 4	Unbilled Primary	Bob Medicare		38
 tSeay - 01/09/2015 - 5	Unbilled Primary	Bob Medicare		35

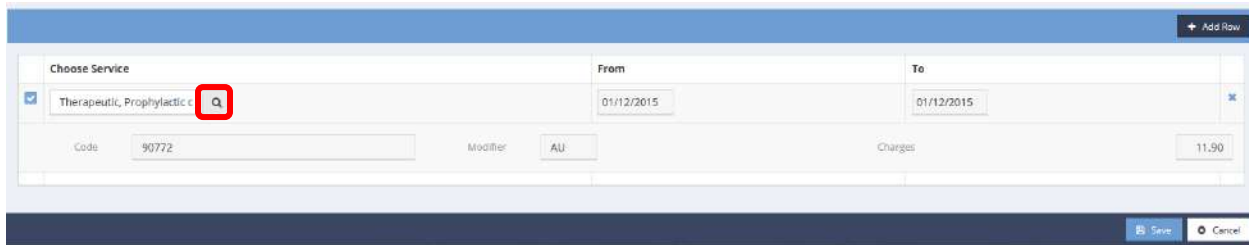
To edit an entry, click the action gear  associated with it and select Edit from the pop up menu that appears.


Charge Entry Summary					
Claim Status <span>▼</span>					
Total Rows: 16					
Batch Name	Claim Status	Primary Insurance	Service	Charge Entry ID	
 kallen - 01/13/2015 - 8	Unbilled Primary	Bob Medicare		52	
  Edit	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	

The Edit Charge Entry Line Item form displays.

Edit Charge Entry Line Item			
Choose Batch			
Batch Name *	janeTjoe - 01/08/2015 - 2		
Choose Patient			
Patient *	Waters, Bob		
Enrollment *	BHT Program		
Provider Information			
Billing Group *	15		
Primary Insurance *	Bob Medicare		
Secondary Insurance			
Is patient's condition related to:			
Employment *	No		
Auto Accident *	No		
Other Accident *	No		
Relevant Dates			
Date of Current Illness, Injury or Pregnancy		Qualifier	Illness
Other Date		Qualifier	
Hospitalization Start Date		End Date	
Diagnosis or Nature of Illness or Injury			
Diagnosis	Choose Options... 291.0 Alcohol withdrawal delirium		
+ Add Row			
Choose Service	From	To	
 Therapeutic, Prophylactic or Diagnostic Injection	1/12/2015	1/12/2015	
 Save  Cancel			


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.

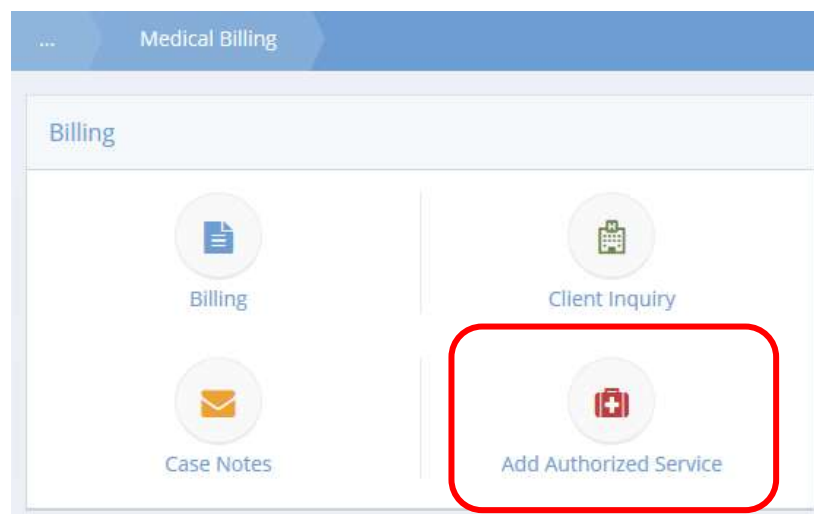
Medical Services Lookup

Service	Location	CPT	Modifier	From	To	Charges
Therapeutic, Prophylactic or Diagnostic Injection	Adrian's Bistro	90772	AU	1/11/2015	1/11/2015	\$11.90
Therapeutic, Prophylactic or Diagnostic Injection	Adrian's Bistro	90772	AU	1/11/2015	1/11/2015	\$11.90

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

## Medical Service Request

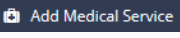
**Objective:** Create medical service request.



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  button.

The Add Medical Service Authorization form displays.

Add Medical Service Authorization

Account Balance and Service Remaining Summary

Service Remaining

Requesting Service From

Service Authorization \*

Enrollment

CPT Code

Begin Date \* 07/08/2015

Account

Service #

Modifier

End Date \*

Service Information

Location \*

Units \* 1

Amount \*

Diagnosis

EMG \* No

Unit Value \*

Authorized By aelason

Case Note and Restriction

Case Note


Restriction Shared

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.*

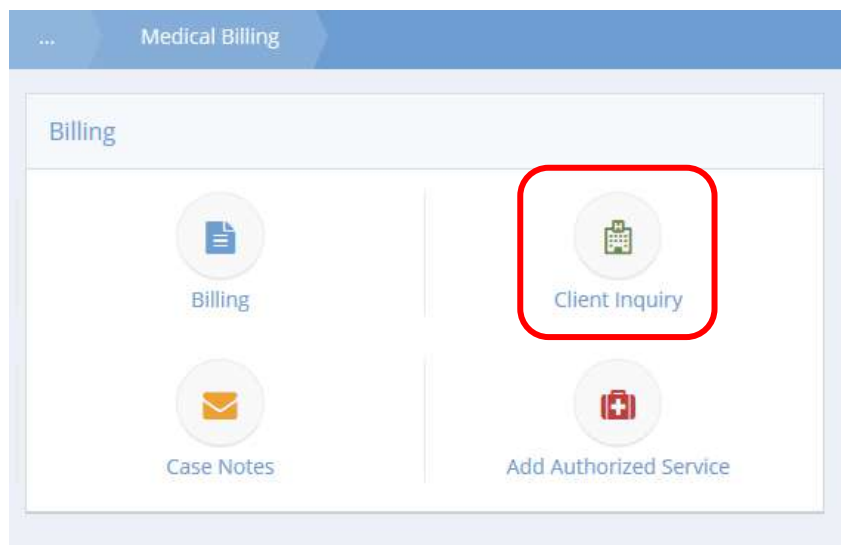


The screenshot shows two sections of a web form. The top section, 'Requesting Service From', contains fields for 'Service Authorization' (Ohana CCS), 'Enrollment' (Medical Program), 'CPT Code' (90845), 'Service' (Medical Psychoanalysis), 'Account' (Gas Account), 'Modifier' (AU), 'Begin Date' (07/08/2015), and 'End Date'. The bottom section, 'Service Information', contains fields for 'Location' (CaseWorthy), 'Units' (1), 'Amount' (\$65.82), 'EMG' (No), and 'Unit Value' (65.82). A 'Diagnosis' field with a search icon is also present. Red boxes highlight the 'Service' dropdown, the 'Begin Date' and 'End Date' fields, and the 'Location', 'Units', 'Amount', and 'EMG' fields.

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.

Charge Entry Summary				
Claim Status: <input type="text"/>				
Total Rows: 2				
Batch Name	Claim Status	Primary Insurance	Service	Charge Entry ID
kaillen - 01/13/2015 - 8	Unbilled Primary	Test		56
kaillen - 01/12/2015 - 7	Unbilled Primary	Test		55

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

Service					
Charge Entry Line Item					
Service	From	To	CPT Code	Modifier	Charges
Therapeutic, Prophylactic or Diagnostic Injection	1/15/2015	1/15/2015	90772	AJ	\$0.00

Click when finished viewing.

### Edit


Charge Entry Summary				
Claim Status: <input type="text"/>				
Total Rows: 2				
Batch Name	Claim Status	Primary Insurance	Service	Charge Entry ID
kaillen - 01/13/2015 - 8	Unbilled Primary	Test		56
kaillen - 01/12/2015 - 7	Unbilled Primary	Test		55

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

The Edit Charge Entry form appears.

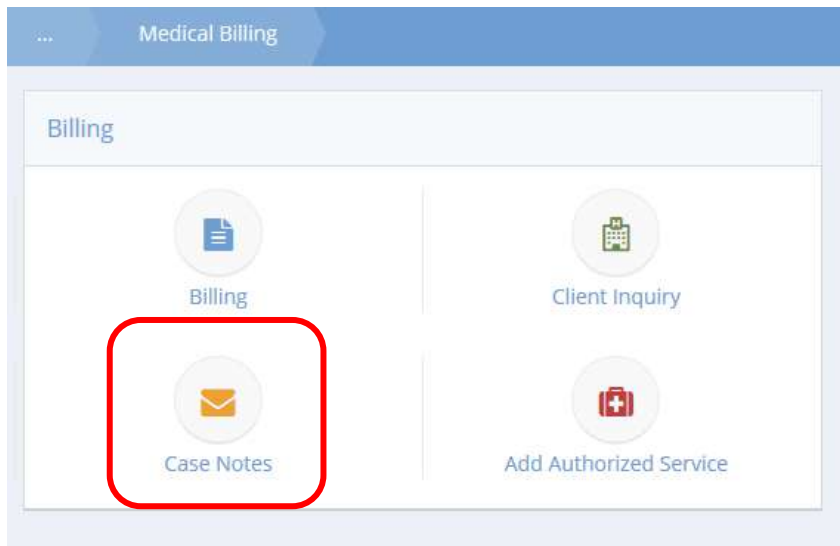
The screenshot shows the 'Edit Charge Entry' form with the following sections and fields:

- Choose Batch:** Batch Name \* kallen - 01/13/2015 - 8
- Choose Patient:** Patient \* Draper, Sally; Enrollment \* (dropdown menu)
- Provider Information:** Billing Group \* 22; Primary Insurance \* Test; Secondary Insurance Test
- Is patient's condition related to:** Employment \* No; Auto Accident \* No; Other Accident \* No
- Relevant Dates:**
  - Date of Current Illness, Injury or Pregnancy: (calendar icon); Qualifier: Illness (dropdown menu)
  - Other Date: (calendar icon); Qualifier: (dropdown menu)
  - Hospitalization Start Date: (calendar icon); End Date: (calendar icon)

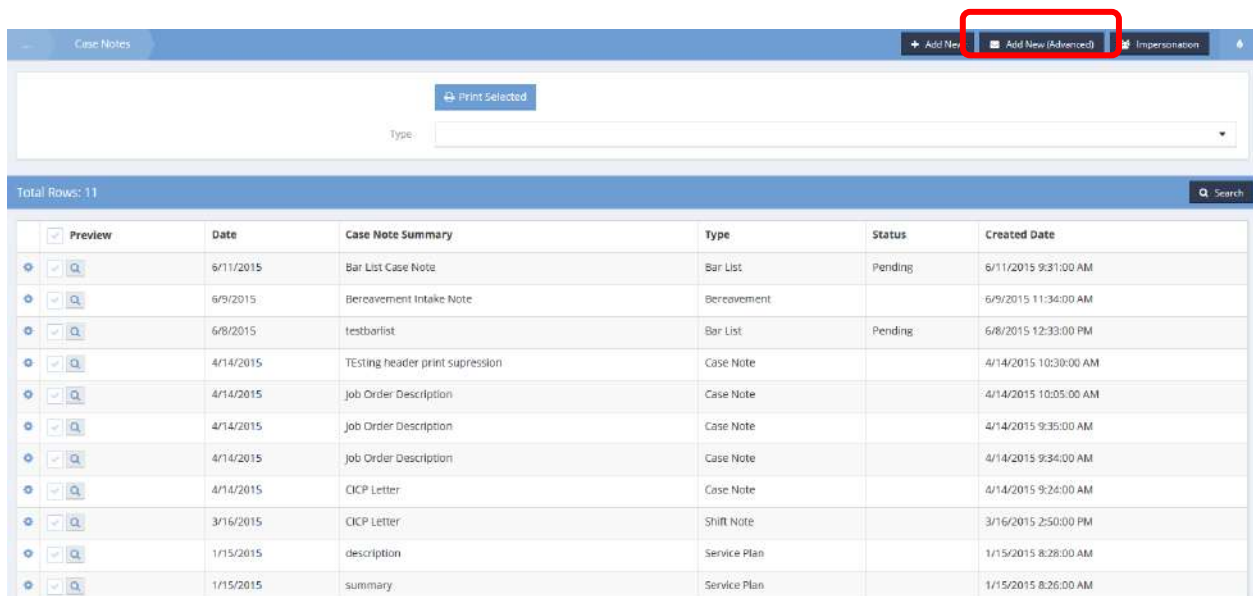
Make any desired changes and click  Save when finished.

## 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.

The screenshot shows the 'Add New Case Note' form. At the top, there is a 'Summary' field and a 'Type' dropdown menu. Below these, there is a 'Reference Date' field set to '07/21/2015' and a 'Body' text area with a rich text editor toolbar. At the bottom of the form, there is a 'Program Enrollment' dropdown menu, a 'Sharing' dropdown set to 'Shared', and a 'Read Only' checkbox. A red box highlights the 'Summary' field. Another red box highlights the 'Program Enrollment' dropdown menu. A third red box highlights the 'Post Time / Service Options' checkbox, which is located at the bottom right of the form.

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.

The screenshot shows the 'Posting Options - Time and Service' section. It contains four checkboxes: 'Post Service and Time', 'Post Medical Service', 'Post Service Only', and 'Post Time Only'. The 'Post Medical Service' checkbox is highlighted with a red box. The 'Post Time / Service Options' checkbox from the previous section is also visible and checked.

Click the checkbox for Post Medical Service.

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

Post Medical Service

Medical Billing Service Entry

Begin Date: 07/21/2015

End Date: 07/21/2015

Enrollment: [Text Field]

Location: [Dropdown]

Service: [Dropdown]

EMG: No

Unit Value: [Text Field]

Units: [Text Field]

Service Total: [Text Field]

Diagnosis: Choose Options...

Time

Type: Regular

Activity: Direct - Face to Face

Location: [Dropdown]

Goal Step: [Dropdown]

Start Date / Time: 07/21/2015 12:00

End Date / Time: 07/21/2015 12:00

Update Cancel

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.

Add Signatures

+ Add Signature

Post Time / Service Options

Posting Options - Time and Service

Post Service and Time: [Checked]

Post Service Only: [Checked]

Post Time Only: [Checked]

Post Medical Service: [Checked] Edit

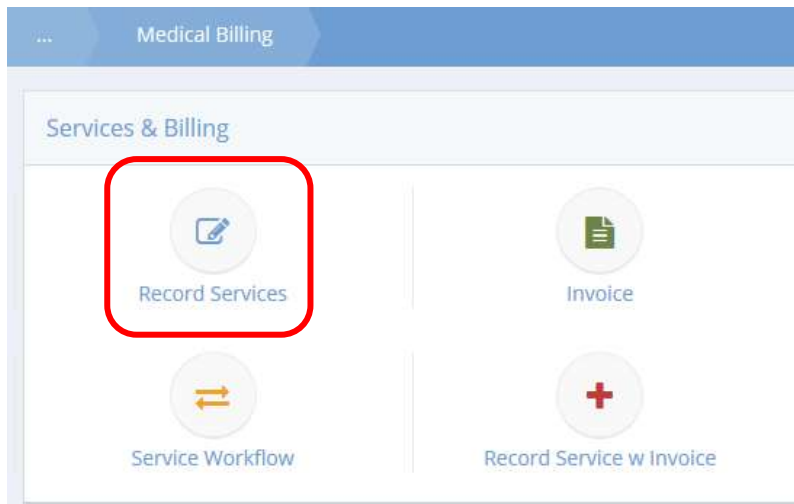
Save Cancel

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  button.

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

Record Services and Fees

Program: Medical Program Category:

Total Rows: 11 Search

Service	Begin Date	Units *	Unit Value	Total	Account	Family or Individual *
<input checked="" type="checkbox"/> AA Meeting		0.00	100.00	0		
<input checked="" type="checkbox"/> Drug Testing	09/29/2015	0.00	1.00			Individual
<p>Family Members: <input type="text"/> <input type="button" value="Search"/> <input type="button" value="X"/></p> <p>Diagnostic Codes: <input type="text"/> Choose Options...</p> <p>Method Of Contact: <input type="text"/></p>						
<input checked="" type="checkbox"/> Duplicate Service		0.00	1.00	0		
<input checked="" type="checkbox"/> Duplicate Service Test		0.00	1.00	0		
<input checked="" type="checkbox"/> Employment Assistance		0.00	1.00	0		
<input checked="" type="checkbox"/> Eye Doctor		0.00	1.00	0		
<input checked="" type="checkbox"/> Home health care		0.00	1.00	0		

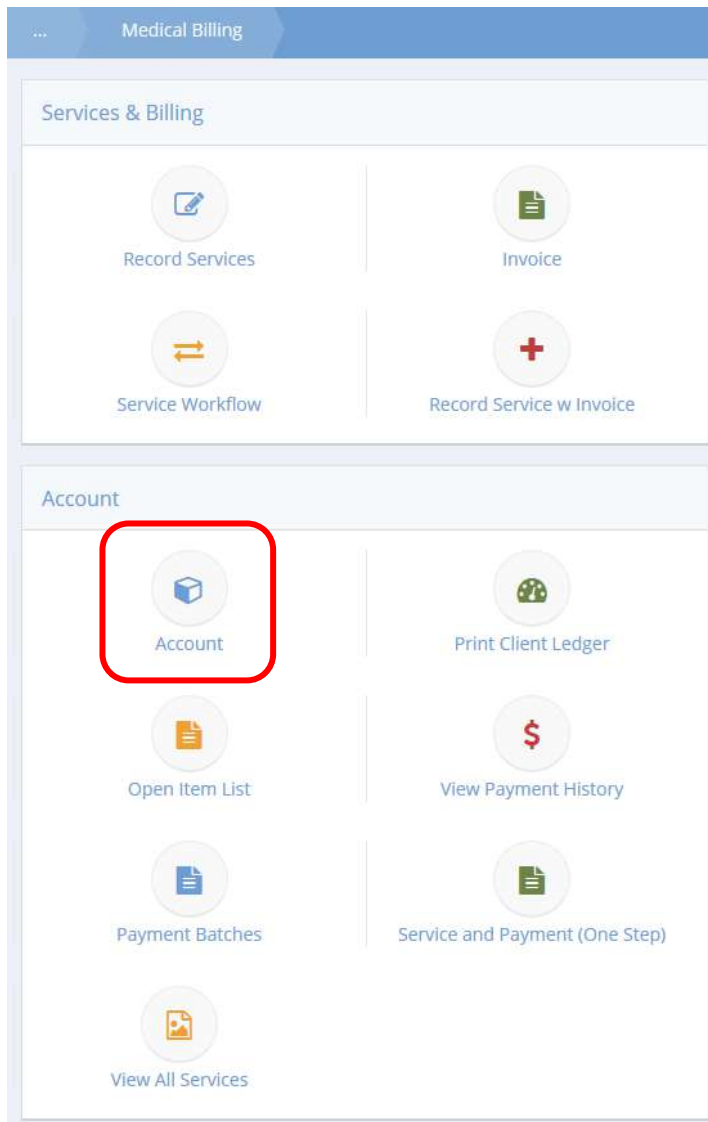
To record a service, click the clear checkbox ☐ icon. The row expands and the checkbox changes to ☒ blue. Enter a number of units and any other relevant information. Click  when finished.



## Medical Billing Account Summary

**Objective:** View and create medical billing accounts.

**Navigation:** Case Management>Health Management>Medical Billing



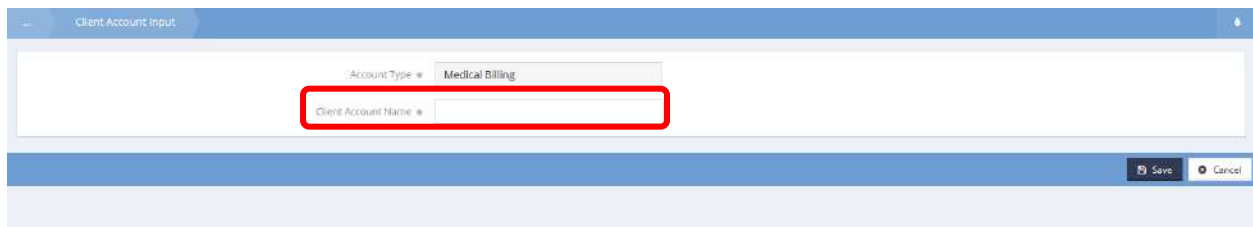
Click the Account icon.

The Client Account Summary form displays.



Client Account Name	Month / Year	Provider / Organization	Account Type	Current Balance	Account ID
---------------------	--------------	-------------------------	--------------	-----------------	------------

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



Account Type: Medical Billing


Client Account Name:

Save Cancel

Enter an account name and click the **Save** button.



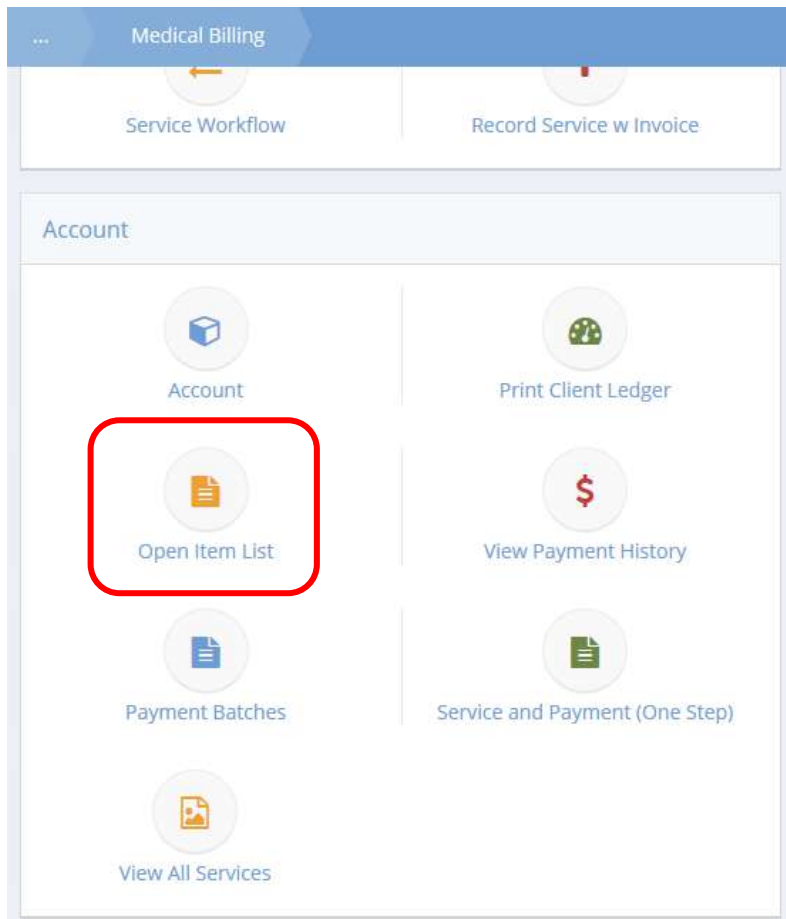
Client Account Name	Month / Year	Provider / Organization	Account Type	Current Balance	Account ID
testaccount		CaseWorthy	Medical Billing	\$0.00	652

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.

Client Account Payments

Batch ID: 1443045352

Batch ID	Payment Date *	Amount *	Type *	Reference Number
1443045352	09/23/2015			

Target Account: Cash Draw - Building 1

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

Service Client Summary

Batch ID and Remaining Balance #

Service Date	Service	Apply Amount	Service Total	Remain	Paid to Date

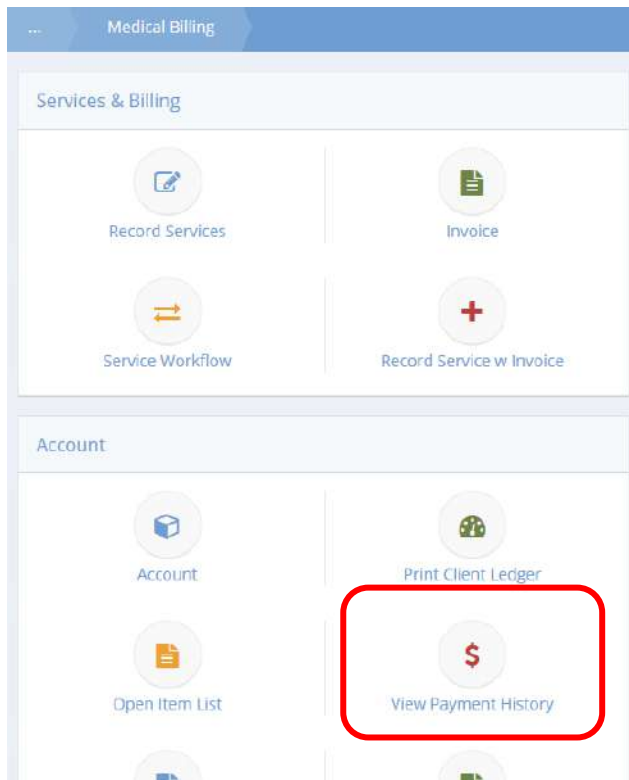
Payment Amount to Apply: \$0.00  
Total Applied Amount: \$0.00  
Remaining Amount: \$0.00

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.

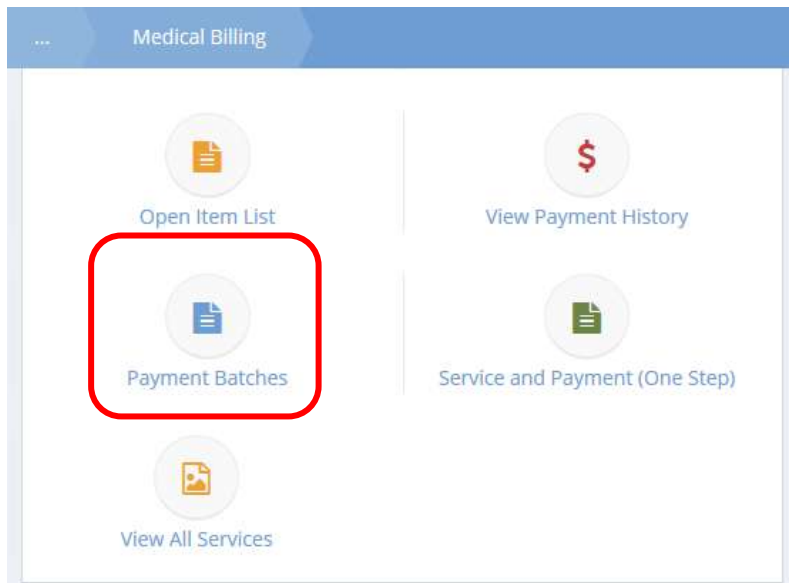
The screenshot shows the 'Client Payment Detail History' form. At the top, there is a search bar with the text 'Search'. Below the search bar is a table with the following data:

Batch ID	Payment Date	Amount	Type	Reference Number
1444323771	10/8/2015	\$150.00	Cash	A1001

## 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.

Client Payment Batches

Total Rows: 4

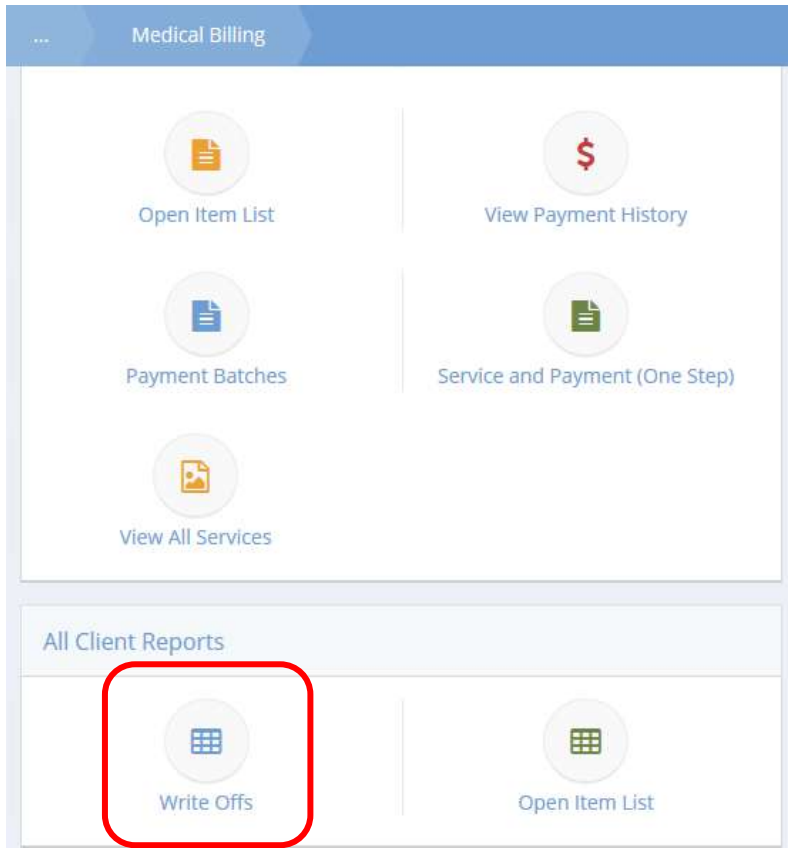
Batch Date	Client Batch ID	Paid To Date	Applied to Service Amount	Batch Remaining
9/23/2015	1443045352	\$50.00	\$0.00	\$50.00
9/23/2015	1443044182	\$50.00	\$0.00	\$50.00
9/23/2015	1443043645	\$50.00	\$0.00	\$50.00
9/23/2015	1443043293	\$50.00	\$0.00	\$50.00
		Total: \$200.00		

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

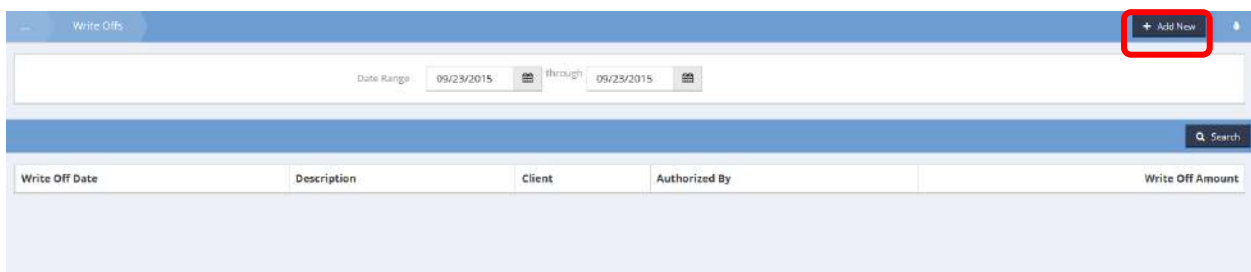
## Write Off Summary

**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.

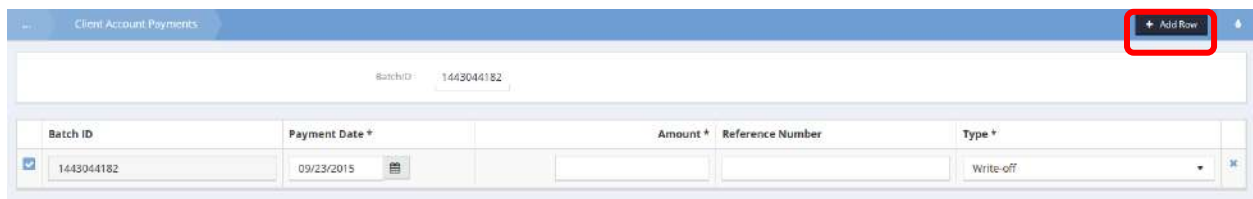


Service Client Summary

Batch ID and Remaining Balance \*

Service Date	Service	Paid to Date	Apply Amount	Service Total	Remain
			Payment Amount to Apply	\$0.00	
			Total Applied Amount	\$0.00	
			Remaining Amount	\$0.00	

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

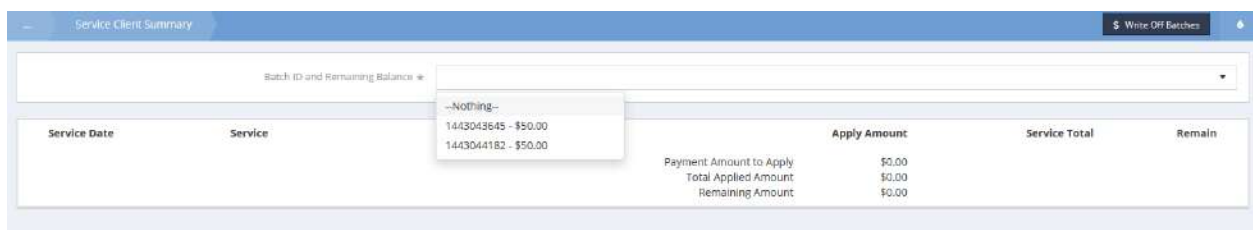


Client Account Payments

Batch ID: 1443044182

Batch ID	Payment Date *	Amount *	Reference Number	Type *
<input checked="" type="checkbox"/> 1443044182	09/23/2015			Write-off

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



Service Client Summary

Batch ID and Remaining Balance \*

--Nothing--  
1443043645 - \$50.00  
1443044182 - \$50.00

Service Date	Service	Apply Amount	Service Total	Remain
		Payment Amount to Apply	\$0.00	
		Total Applied Amount	\$0.00	
		Remaining Amount	\$0.00	

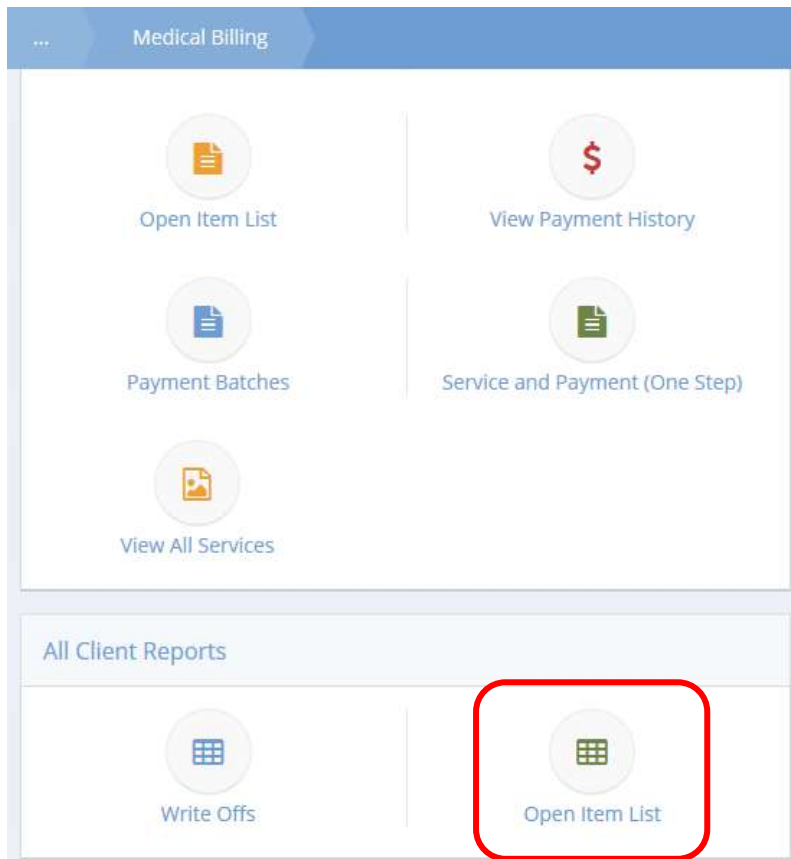
Select the newly created batch from the drop-down list and click the **Save** button when finished.



## 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.

The screenshot shows the 'Open Items List' form. It has a blue header bar with the title 'Open Items List'. Below the header is a search bar with a magnifying glass icon and the word 'Search'. Below the search bar is a date range selection area with a red box around it. The date range selection area contains the text 'Begin Date' followed by a date picker showing '09/24/2015', the word 'through', another date picker showing '09/24/2015', and a calendar icon. Below the date range selection area is a table with the following columns: 'Client', 'Service', 'Service Date', 'Invoice Date', 'Invoice #', 'Quantity', 'Rate', and 'Amount'. The table is currently empty.

Select a date range and click the  Search button.

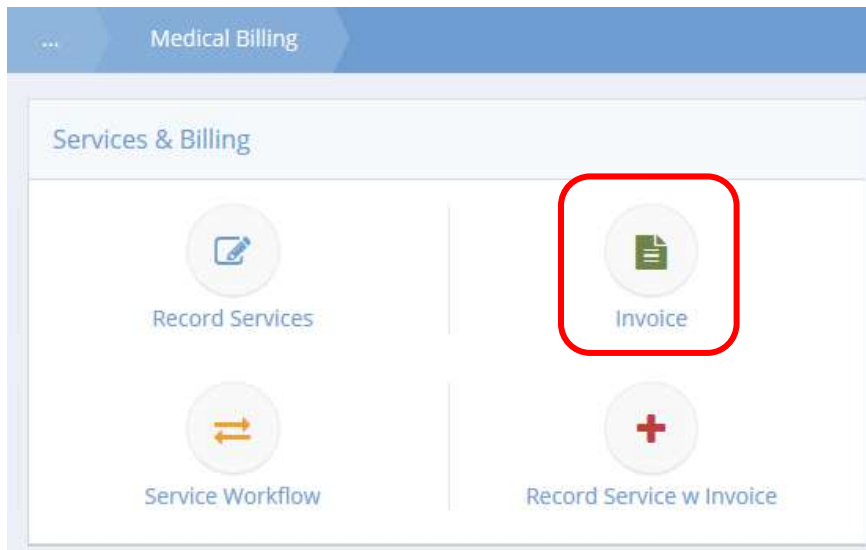
All items within the specified date range display below the header section.

Open Items List							
Begin Date: 07/01/2015 through 09/24/2015							
Search							
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 **+ Add New** button. The Create Invoice Line form displays.

The screenshot shows the 'Create Invoice Line' form. It contains several input fields: Invoice Description, Invoice Begin Date (09/23/2015), Due Date (09/23/2015), Transaction Begin Date, Transaction End Date, Invoice Number (84), Bill From (CaseWorthy), and Bill To (Cliente, Nuevo). Below the form, there is a table with columns: Date, Invoice Expanded Description, Unit Of Measure, Quantity \*, Bill Rate, and Amount \*. The table currently shows 'Total Rows: 0'.

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

Medical Invoice Summary Ellis, Roger + Add New Search


Invoice Description	Invoice Date	Due Date	Bill From	Amount	Services
AA Meeting	8/18/2015	8/18/2015	CaseWorthy	\$15.00	
Drug Testing	8/18/2015	8/18/2015	CaseWorthy	\$1.00	
t3	8/17/2015	8/17/2015	CaseWorthy	\$206.48	
Session Billing	8/12/2015	8/12/2015	CaseWorthy	\$254.25	
				Total: 476.73	

The Invoice Line Items Summary form displays.

Services Invoice Line Items Summary +

Total Rows: 1

Date	Invoice Expanded Description	Unit Of Measure	Quantity	Bill Rate	Amount
8/18/2015	AA Meeting	Quantity	1.00	\$15.00	\$15.00
				Total:	\$15.00

Click  Save when finished viewing.

Medical Invoice Summary Ellis, Roger + Add New Search

Invoice Description	Invoice Date	Due Date	Bill From	Amount	Services
AA Meeting	8/18/2015	8/18/2015	CaseWorthy	\$15.00	
 Edit  Print Invoice	8/18/2015	8/18/2015	CaseWorthy	\$1.00	
t3	8/17/2015	8/17/2015	CaseWorthy	\$206.48	
Session Billing	8/12/2015	8/12/2015	CaseWorthy	\$254.25	
				Total: 476.73	

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.

← Edit Medical Invoice Line

Invoice Description: Drug Testing

Invoice Begin Date: 08/18/2015 Due Date: 08/18/2015

Transaction Begin Date: Transaction End Date:

Invoice Number: 70

Bill From: CaseWorthy Bill To: Ellis, Roger

Total Rows: 1


Date	Invoice Expanded Description	Unit Of Measure	Quantity *	Bill Rate	Amount *
8/18/2015	Drug Testing	Quantity	1.00	\$1.00	\$1.00
					Total: \$1.00

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

← Medical Invoice Summary Ellis, Roger + Add New

Search

Invoice Description	Invoice Date	Due Date	Bill From	Amount	Services
AA Meeting	8/18/2015	8/18/2015	CaseWorthy	\$15.00	
 Edit	8/18/2015	8/18/2015	CaseWorthy	\$1.00	
 Print Invoice	8/17/2015	8/17/2015	CaseWorthy	\$206.48	
Session Billing	8/12/2015	8/12/2015	CaseWorthy	\$254.25	
				Total: 476.73	

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.

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

Invoice: 70  
August 18, 2015

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:

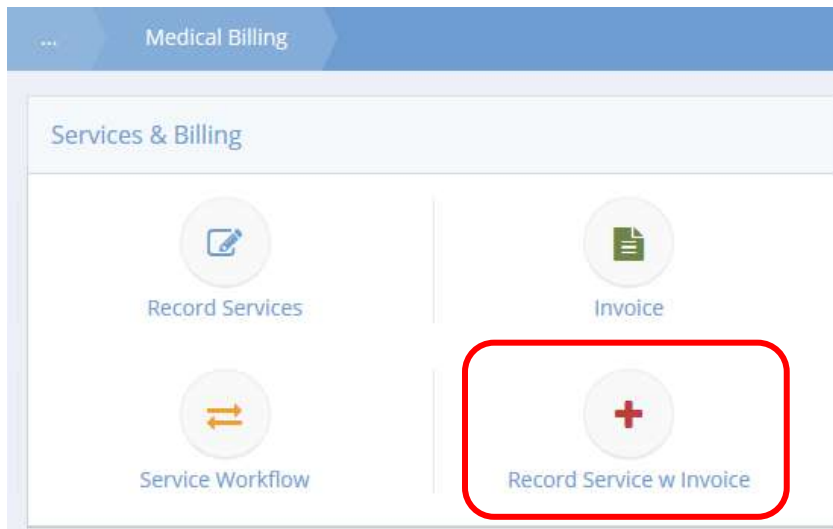
Write-Offs:

**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.

The screenshot shows the 'Record Services and Fees' form. The 'Invoice Description' field is highlighted with a red box. Below it, the 'Invoice Begin Date' is set to 09/24/2015. The 'Bill From' dropdown menu is set to 'CaseWorthy' and is also highlighted with a red box. The 'Program' dropdown menu is highlighted with a red box. The 'Due Date' is set to 09/24/2015. The 'Bill To' field is set to 'Ellis, Roger'. The 'Invoice Number' is set to 84.

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.

Record Services and Fees

Invoice Begin Date: 09/24/2015 Due Date: 09/24/2015

Bill From: CaseWorthy Bill To: Ellis, Roger

Program: Communities in Schools

Invoice Number: 84

Total Rows: 6

Service	Begin Date	Units	Unit Value	Total	Account	Family or Individual *
<input checked="" type="checkbox"/> After School Math Study Program		0.00	1.00	0		
<input type="checkbox"/> Initial Assessment Completed	09/24/2015	0.00	1.00			Individual
<p>Family Members: <input type="text"/> <input type="button" value="Search"/> <input type="button" value="X"/></p> <p>Diagnosis Codes: <input type="text" value="Choose Option..."/></p> <p>Method Of Contact: <input type="text"/></p>						
<input checked="" type="checkbox"/> Initial Service Plan		0.00	1.00	0		
<input checked="" type="checkbox"/> Parent Consent Completed		0.00	1.00	0		
<input checked="" type="checkbox"/> Resume Writing Attendance		0.00	2.00	0		
<input checked="" type="checkbox"/> Student Assessment - Review		0.00	1.00	0		

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  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.

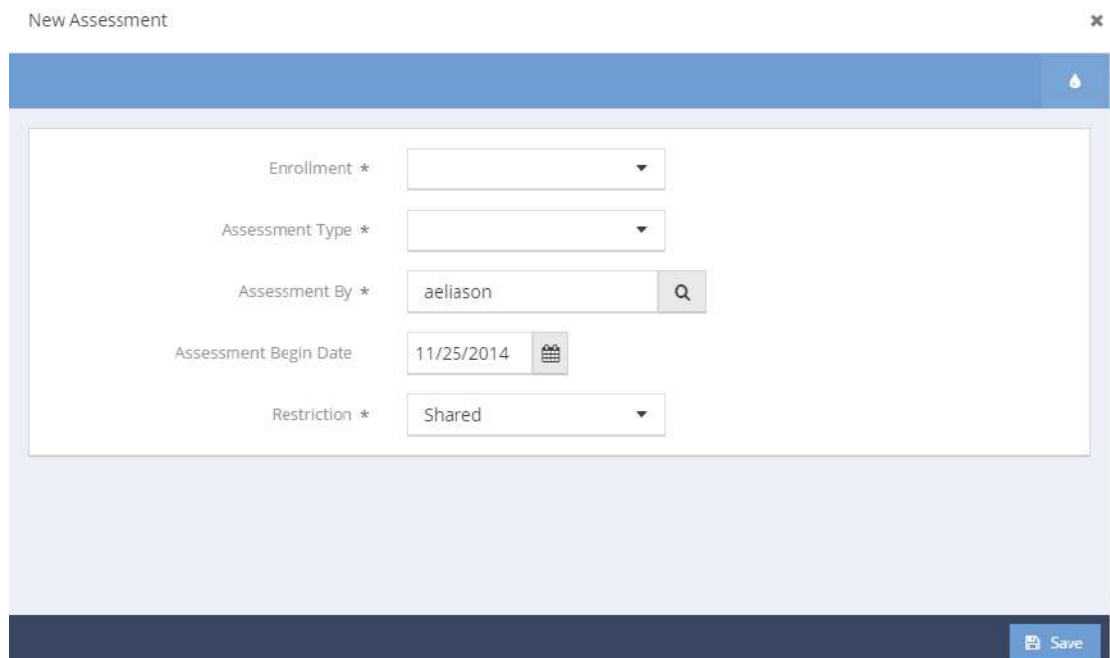
### Create a Brand-New Assessment

Click on the  portion of the Assessment field. The field expands.

No assessment selected. <span>▼</span>			
<a href="#">+ New Assessment</a> <a href="#">📄 Copy Current Assessment</a> <a href="#">📄 Copy Assessments</a>			
<a href="#">📄 Edit Date/Restriction</a>			
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  button to create a new assessment.

The New Assessment form displays.




The screenshot shows a web form titled "New Assessment" with a close button (X) in the top right corner. The form contains several fields: "Enrollment \*" with a dropdown arrow, "Assessment Type \*" with a dropdown arrow, "Assessment By \*" with a text input containing "aeliason" and a search icon, "Assessment Begin Date" with a date input showing "11/25/2014" and a calendar icon, and "Restriction \*" with a dropdown menu showing "Shared". A "Save" button is located at the bottom right of the form.

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.



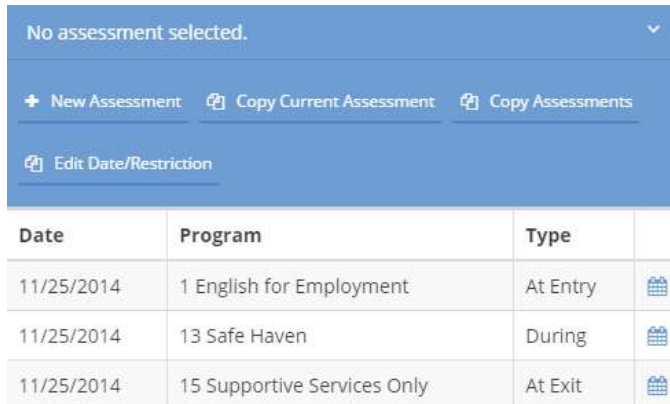
This screenshot shows a close-up of the "Assessment Type \*" dropdown menu. The menu is open, displaying the following options: "--Nothing--", "At Entry", "During", "At Exit", and "Annual". The "Assessment By \*" field is visible in the background.

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

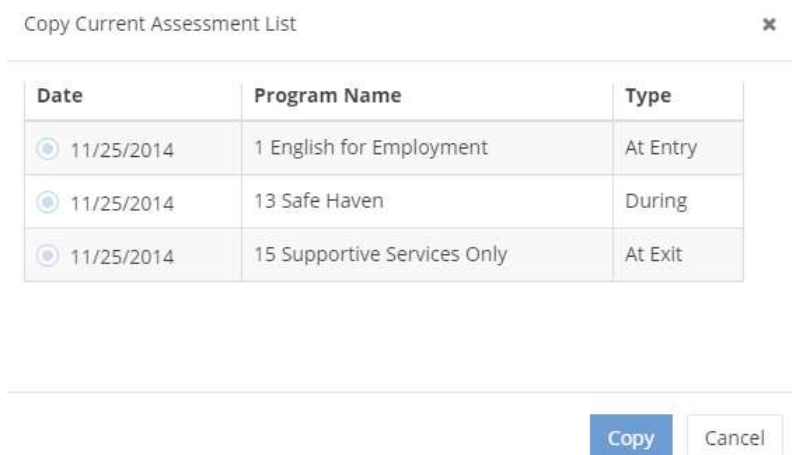
Click on the  portion of the Assessment field. The field expands.



The expanded dropdown menu shows four options: '+ New Assessment', 'Copy Current Assessment', 'Copy Assessments', and 'Edit Date/Restriction'. Below these options is a table of previous assessments.

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  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.)



The dialog box titled 'Copy Current Assessment List' contains a table of previous assessments. Each row has a radio button in the first column, followed by the date, program name, and type.

	Date	Program Name	Type
<input checked="" type="radio"/>	11/25/2014	1 English for Employment	At Entry
<input type="radio"/>	11/25/2014	13 Safe Haven	During
<input type="radio"/>	11/25/2014	15 Supportive Services Only	At Exit

At the bottom right of the dialog box are two buttons: 'Copy' and 'Cancel'.

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  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**

Select Program Name

Program Name: 1 English for Employment

Assessment Type: At Entry

Assessment Date: 11/25/2014

Copy Assessments Cancel

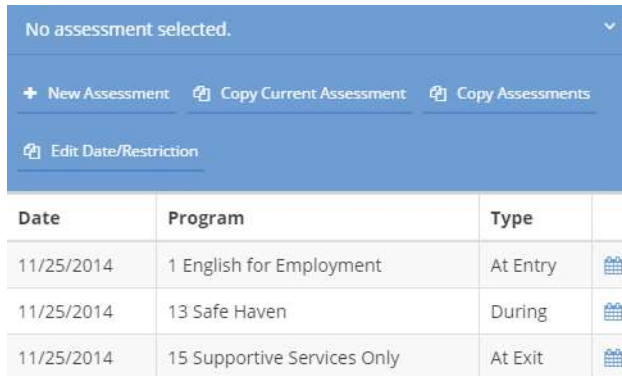
Indicate the desired assessment event for the new assessment and click the **Copy Assessments** button.

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.



The expanded dropdown menu shows a blue header with the text "No assessment selected." and a downward arrow. Below the header are three links: "+ New Assessment", "Copy Current Assessment" (with a document icon), and "Copy Assessments" (with a document icon). Below these links is a link "Edit Date/Restriction" (with a calendar icon). Below the links is a table with three columns: "Date", "Program", and "Type". The table contains three rows of data.

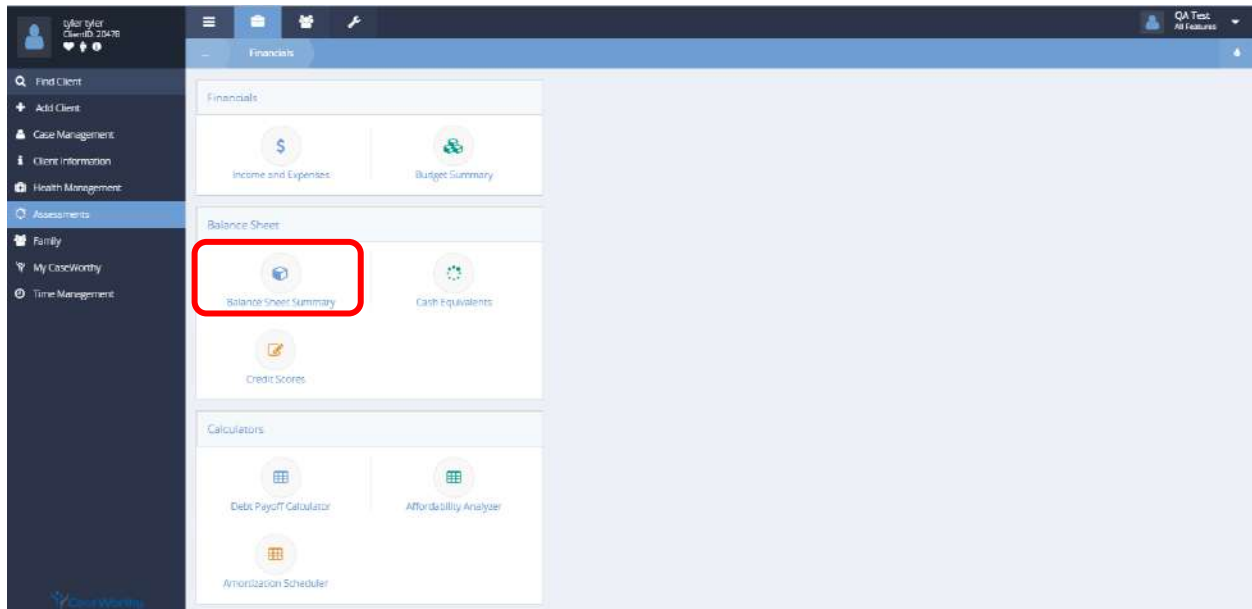
Date	Program	Type	
11/25/2014	1 English for Employment	At Entry	
11/25/2014	13 Safe Haven	During	
11/25/2014	15 Supportive Services Only	At Exit	

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.

Balance Sheet Summary								
								+ Add New
Total Rows: 2								Search
Assessment Date	Program Name	Event	Liabilities	Assets	Liabilities	Equity	Assessment ID	
2/15/2017	I FinancialHMIS	At Exit	Yes	\$0.00	\$4,545.00	\$-4,545.00	20681	
2/1/2017	Test CoC: Street Outreach	At Entry	No	\$0.00	\$4,545.00	\$-4,545.00	18534	

Click the **+ Add New** 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.

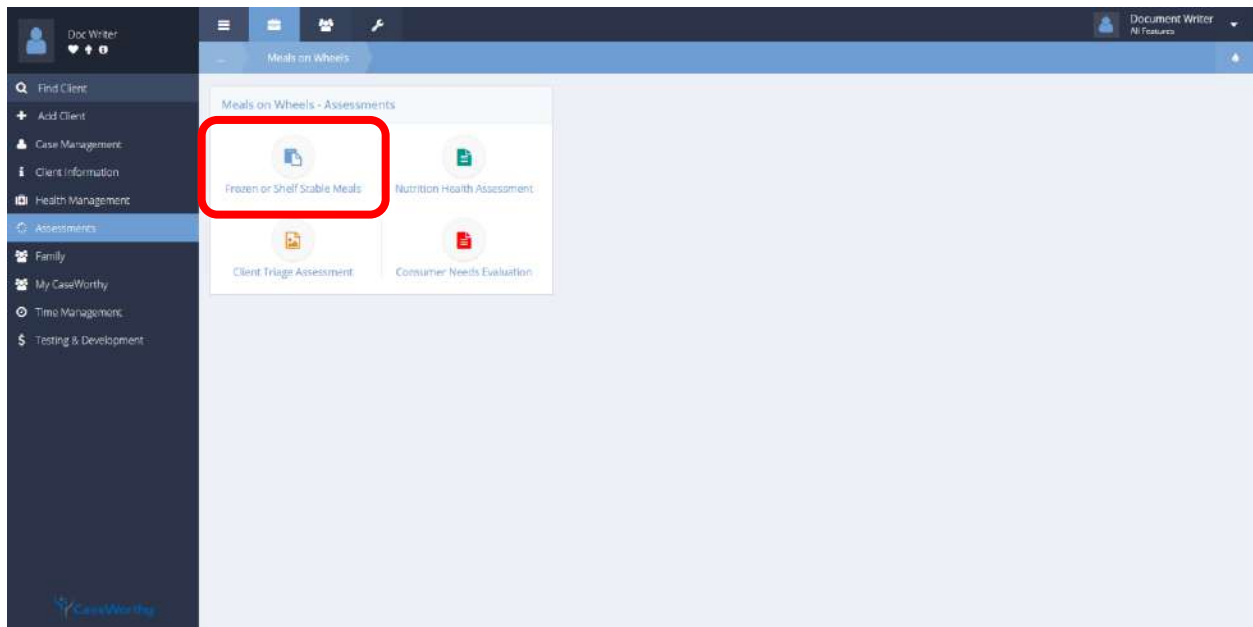


## Meals on Wheels

### 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.

Frozen or Shelf Stable Meals

+ Add New

	Assessment Date	Program	Assessment Event	Contact	AssessmentID
	5/31/2016	CC Basic Needs	During		16595

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.

Frozen or Shelf Stable Meals
+ Add New

Assessment: No assessment selected.

Does the client has adequate refrigerator and freezer storage for meals delivered?

Does the client have working microwave?

Does the client have a working oven?

Can the client safely operate microwave or oven to reheat meals?

Is the client willing to accept a donation of a microwave, if needed?

Client has capacity to handle meals safely

Is there an adult who would be available to assist the client in safely storing the meals and reheating the frozen meals if the client is unable to do so?

What frequency is this adult in contact with the client?

Contact Information for the adult who is willing to assist the client.

Contact:

Relationship to Client:

Contact Phone Number:

General Note:

Created By and Date

Created By: doc

Created Date: 06/01/2016

Assessment.CreatedBy:

Save Cancel

Select an existing or create a new Assessment. Fill remaining fields as desired. Click the Save button to save and exit.

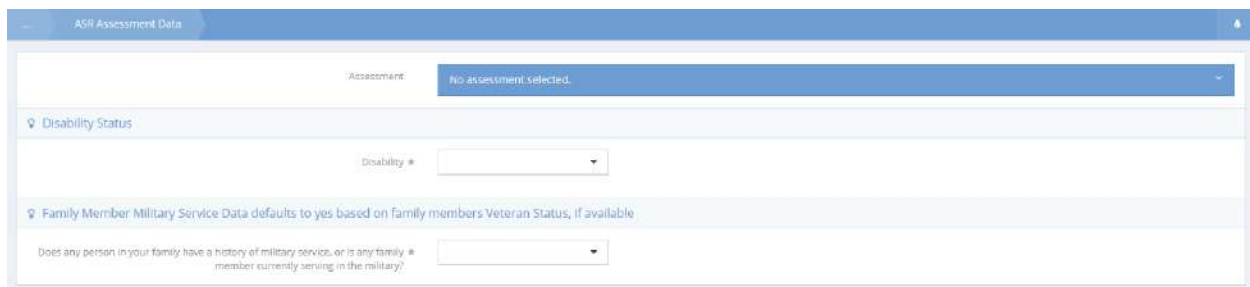
## ASR Assessment

The ASR Assessment is used to record info necessary for the ASR report. To create a new assessment, click the **+ Add New** button.



ASR Assessment Data				
Total Rows: 1				
Disability	Disability Confirmation Method	Service Connected Disability	Family Member of Person in/History of Military Service	Assessment
No			No	11337

The ASR Assessment Data form displays.



ASR Assessment Data

Assessment: No assessment selected.

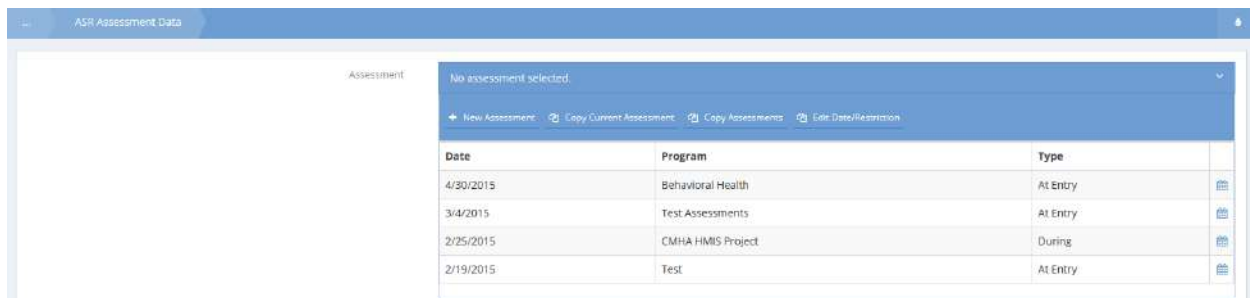
Disability Status

Disability \*

Family Member Military Service Data defaults to yes based on family members Veteran Status, if available

Does any person in your family have a history of military service, or is any family member currently serving in the military?

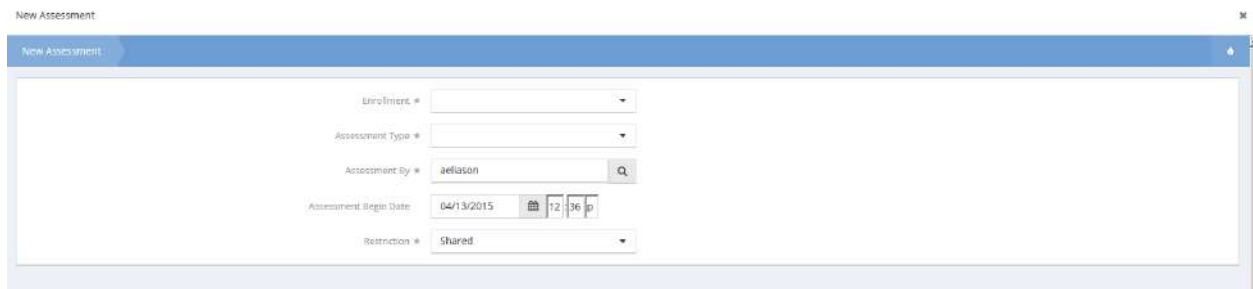
Click on the Assessment field. The Assessment field expands.



ASR Assessment Data				
Assessment				
No assessment selected.				
<a href="#">+ New Assessment</a> <a href="#">Copy Current Assessment</a> <a href="#">Copy Assessments</a> <a href="#">Edit Date/Restriction</a>				
Date	Program	Type		
4/30/2015	Behavioral Health	At Entry		
3/4/2015	Test Assessments	At Entry		
2/25/2015	CMHA HMIS Project	During		
2/19/2015	Test	At Entry		

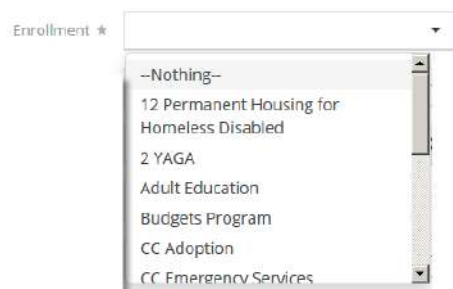
Click on the desired assessment or click on the **+ New Assessment** button.

If new assessment is selected, the New Assessment form opens in a new window.



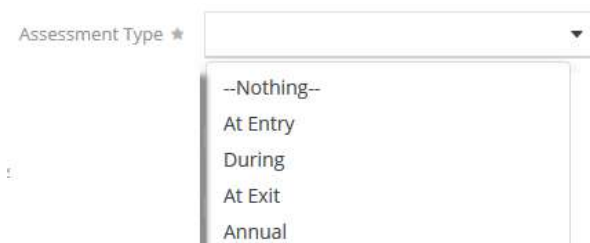
The screenshot shows a web browser window titled "New Assessment". The form has a blue header bar with the text "New Assessment" and a close button. Below the header, the form contains several fields: "Enrollment \*" with a dropdown arrow, "Assessment Type \*" with a dropdown arrow, "Assessment By \*" with a text input containing "aefason" and a magnifying glass icon, "Assessment Begin Date" with a date input showing "04/13/2015" and a time input showing "12:36 p", and "Restriction \*" with a dropdown arrow showing "Shared".

Click on the down arrow ▼ for Enrollment and select from the drop-down list.





The screenshot shows the "Enrollment \*" dropdown menu open. The menu lists the following options: "--Nothing--", "12 Permanent Housing for Homeless Disabled", "2 YAGA", "Adult Education", "Budgets Program", "CC Adoption", and "CC Emergency Services".

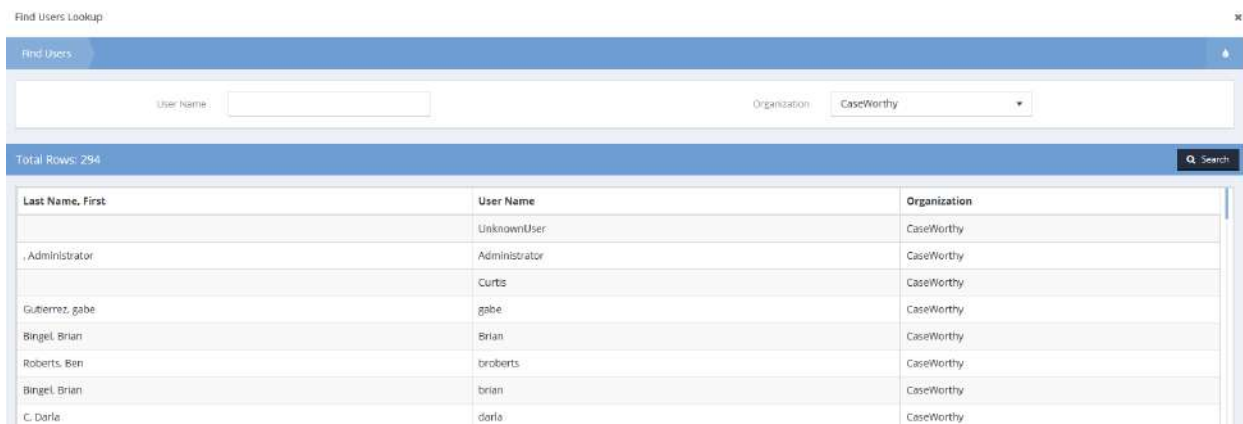
Click on the down arrow ▼ for Assessment Type and select from the drop-down list.



The screenshot shows the "Assessment Type \*" dropdown menu open. The menu lists the following options: "--Nothing--", "At Entry", "During", "At Exit", and "Annual".

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.



Find Users Lookup


Find Users

User Name:  Organization: CaseWorthy

Total Rows: 294

Last Name, First	User Name	Organization
	UnknownUser	CaseWorthy
Administrator	Administrator	CaseWorthy
	Curtis	CaseWorthy
Gutierrez, gabe	gabe	CaseWorthy
Bingel, Brian	Brian	CaseWorthy
Roberts, Ben	broberts	CaseWorthy
Bingel, Brian	brian	CaseWorthy
C. Darla	darla	CaseWorthy

Click on the down arrow  icon for Restriction and select from the drop-down list.

Click  Save to finish creating the new assessment.




Restriction ★

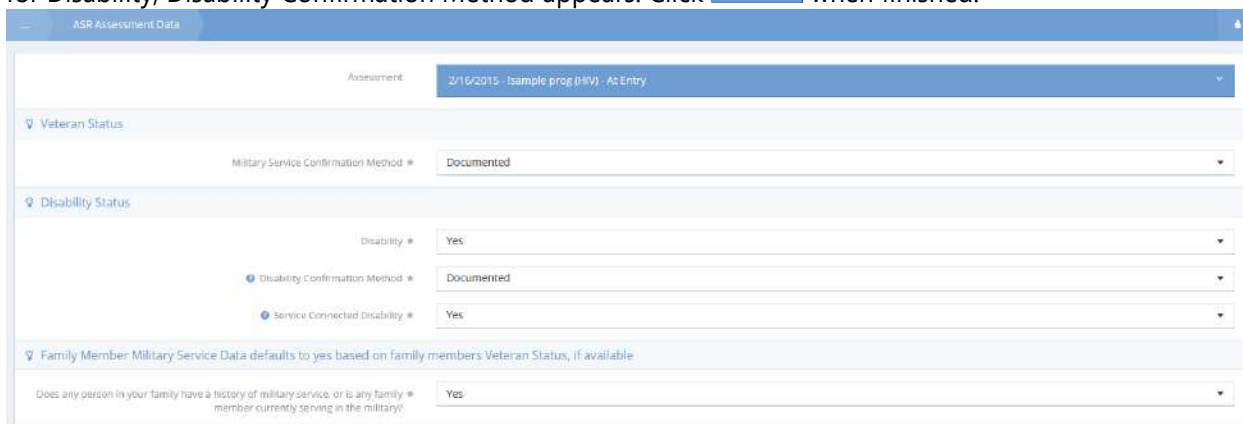
Shared

--Nothing--

Shared

Not Shared

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.



ASR Assessment Data

Assessment: 2/16/2015 :sample prog (RIV) - As Entry

Veteran Status

Military Service Confirmation Method: Documented

Disability Status

Disability: Yes

Disability Confirmation Method: Documented

Service Connected Disability: Yes

Family Member Military Service Data defaults to yes based on family members Veteran Status, if available

Does any person in your family have a history of military service, or is any family member currently serving in the military? Yes

## Event – Check-in and Out

To create a new Child Care Enrollment assessment, click the **+ Add New** button. The Child Care Enrollment form displays.

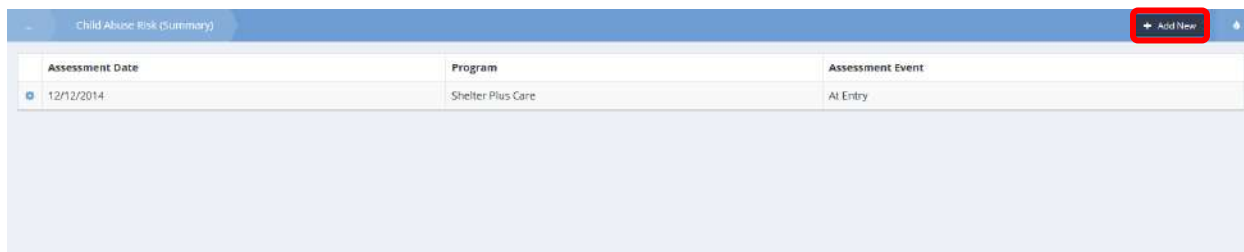
Child Care In Out Event Summary					+ Add New	
Total Rows: 1						
In-Out Event	Assessment	Client Age	Client ID			
	11337	28	9998			

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 Care Enrollment		
Assessment	No assessment selected.	
Event In-Out	Choose Options...	

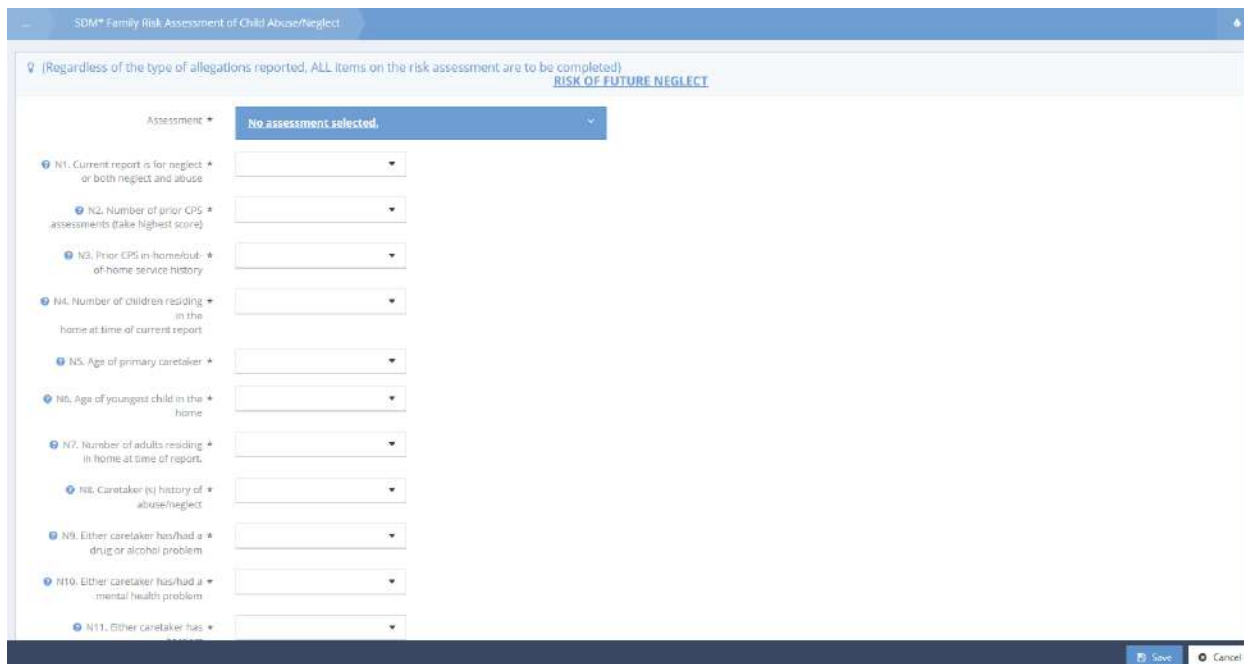
## Child Abuse Risk

**Objective:** Complete an assessment for client risk of child abuse.



Assessment Date	Program	Assessment Event
12/12/2014	Shelter Plus Care	At Entry

From the Child Abuse Risk Summary form, click the **+ Add New** button. The SDM\* Family Risk Assessment of Child Abuse/Neglect form displays.



(Regardless of the type of allegations reported, ALL items on the risk assessment are to be completed)

**RISK OF FUTURE NEGLECT**

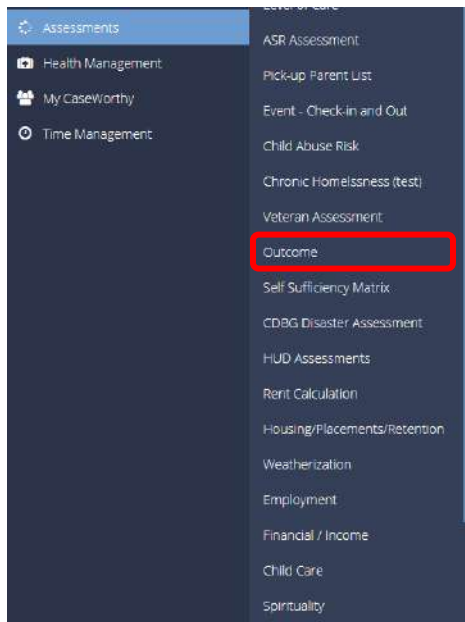
Assessment: **No assessment selected.**

- N1. Current report is for neglect or both neglect and abuse
- N2. Number of prior CPS assessments (take highest score)
- N3. Prior CPS in home/out-of-home service history
- N4. Number of children residing in the home at time of current report
- N5. Age of primary caretaker
- N6. Age of youngest child in the home
- N7. Number of adults residing in home at time of report
- N8. Caretaker (s) history of abuse/neglect
- N9. Either caretaker has/had a drug or alcohol problem
- N10. Either caretaker has/had a mental health problem
- N11. Either caretaker has

Save Cancel

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.

Outcome Assessment + Add New

Total Rows: 1

Outcome Date	Program	Assessment Event	Outcome Domain	Outcome Score	Value
3/6/2015 12:00:00 AM	Adult Education	During	Adult Education	Has high school diploma/GED	1
					Total: 1.00

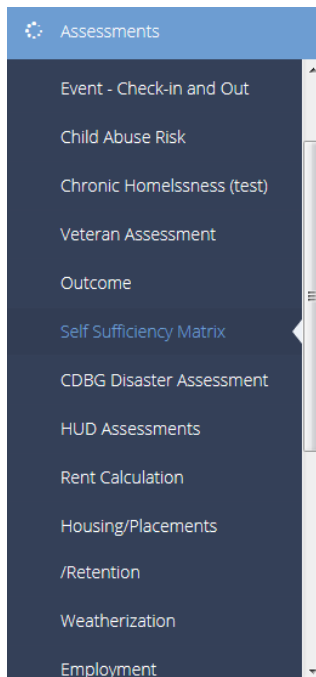
Add Assessment Outcomes Search

Outcome Date *	Outcome Domain	Outcome Score *
<input checked="" type="checkbox"/> 03/06/2015	<input checked="" type="checkbox"/> Adult Education	<input checked="" type="checkbox"/> Literacy problems and/or no high school diploma/GED Literacy problems and/or no high school diploma/GED are serious barriers to employment. <input checked="" type="checkbox"/> Enrolled in literacy and/or GED program and/or has Enrolled in literacy and/or GED program and/or has sufficient command of English to where language is not a barrier to employment <input type="checkbox"/> Has high school diploma/GED <input checked="" type="checkbox"/> Needs additional education/training to improve emp Needs additional education/training to improve employment situation and/or to resolve literacy problems to where they are able to function effectively in society <input checked="" type="checkbox"/> Has completed education/training needed to become Has completed education/training needed to become employable. No literacy problems <input checked="" type="checkbox"/> Don't Know <input checked="" type="checkbox"/> Refused



## Self Sufficiency Matrix

**Objective:** Complete assessments related to clients' self-sufficiency.



The Self Sufficiency Matrix form displays.

 A screenshot of the 'Self Sufficiency Matrix' form. At the top right, there is a red box around a '+ Add New' button. Below the header, it says 'Total Rows: 1'. The table has six columns: Outcome Date, Program, Assessment Event, Outcome Domain, Outcome Score, and Value. The first row contains the following data: Outcome Date: 4/13/2015 12:00:00 AM, Program: 12 Permanent Housing for Homeless Disabled, Assessment Event: During, Outcome Domain: Adult Education (Self Sufficiency Matrix), Outcome Score: High school diploma or G.E.D., and Value: 6,0000. A 'Total: 6.00' is shown at the bottom right of the table.
 

Outcome Date	Program	Assessment Event	Outcome Domain	Outcome Score	Value
4/13/2015 12:00:00 AM	12 Permanent Housing for Homeless Disabled	During	Adult Education (Self Sufficiency Matrix)	High school diploma or G.E.D.	6,0000
					Total: 6.00

To add a new assessment event, click on the  button. The Add Self-Sufficiency Assessment form displays.

 A screenshot of the 'Add Self-Sufficiency Assessment' form. It features a blue header with the title 'Add Self-Sufficiency Assessment'. Below the header, there is a dropdown menu labeled 'Assessment' with the text 'No assessment selected.' and a downward arrow. At the bottom right, there is a search bar with a magnifying glass icon and the word 'Search'.

Click on the Assessment field. The Assessment field expands.

Assessment \*

No assessment selected.

+ New Assessment Copy Current Assessment Copy Assessments Edit Date/Restriction

Date	Program	Type
4/13/2015	12 Permanent Housing for Homeless Disabled	During
4/13/2015	2 YAGA	At Entry
3/19/2015	CC Refugee Reception & Placement	At Entry
3/18/2015	CC Adoption	At Entry
3/18/2015	CC Emergency Services	At Entry

Search

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.

New Assessment

Enrollment \*

Assessment Type \*

Assessment By \* aelason

Assessment Begin Date 04/13/2015 12:36 p

Restriction \* Shared

Click on the down arrow ▼ for Enrollment and select from the drop-down list.

Enrollment \*

--Nothing--

12 Permanent Housing for Homeless Disabled


2 YAGA

Adult Education

Budgets Program

CC Adoption



CC Emergency Services


Click on the down arrow  for Assessment Type and select from the drop-down list.

Assessment Type ★

▼

--Nothing--  
At Entry  
During  
At Exit  
Annual


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  button. Select the desired user from the list presented. The Find Users Lookup form closes.

Find Users Lookup

Find Users

User Name:  Organization: CaseWorthy ▼

Total Rows: 294 

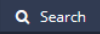
Last Name, First	User Name	Organization
	UnknownUser	CaseWorthy
Administrator	Administrator	CaseWorthy
	Curtis	CaseWorthy
Gutierrez, gabe	gabe	CaseWorthy
Bingel, Brian	Brian	CaseWorthy
Roberts, Ben	broberts	CaseWorthy
Bingel, Brian	brian	CaseWorthy
C. Darla	darla	CaseWorthy

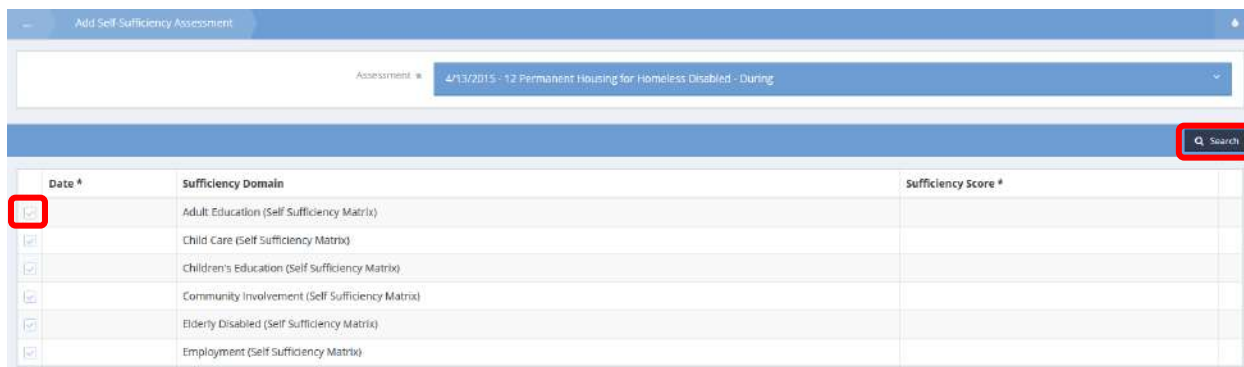
Click on the down arrow  icon for Restriction and select from the drop-down list.

Restriction ★

Shared ▼

--Nothing--  
Shared  
Not Shared

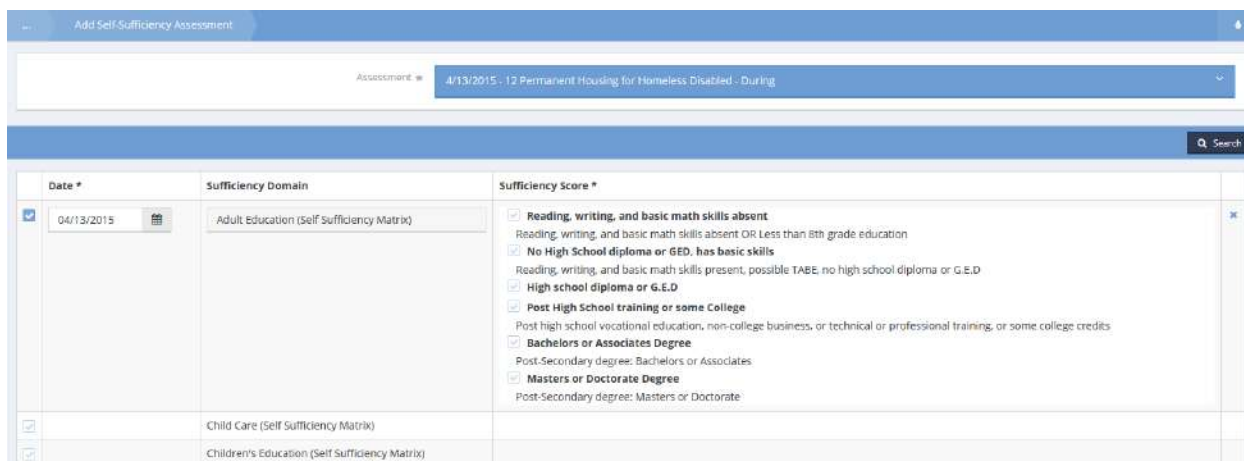
On the Add Self-Sufficiency Assessment form click on the  button. A list of sufficiency domains appears.






Date *	Sufficiency Domain	Sufficiency Score *
<input checked="" type="checkbox"/>	Adult Education (Self Sufficiency Matrix)	
<input checked="" type="checkbox"/>	Child Care (Self Sufficiency Matrix)	
<input checked="" type="checkbox"/>	Children's Education (Self Sufficiency Matrix)	
<input checked="" type="checkbox"/>	Community Involvement (Self Sufficiency Matrix)	
<input checked="" type="checkbox"/>	Elderly Disabled (Self Sufficiency Matrix)	
<input checked="" type="checkbox"/>	Employment (Self Sufficiency Matrix)	

Click on the clear checkbox  for the desired sufficiency domain.

The row expands.





Date *	Sufficiency Domain	Sufficiency Score *
 04/13/2015 	Adult Education (Self Sufficiency Matrix)	<input checked="" type="checkbox"/> <b>Reading, writing, and basic math skills absent</b> Reading, writing, and basic math skills absent OR Less than 8th grade education <input checked="" type="checkbox"/> <b>No High School diploma or GED, has basic skills</b> Reading, writing, and basic math skills present, possible TABE, no high school diploma or G.E.D. <input checked="" type="checkbox"/> <b>High school diploma or G.E.D.</b> <input checked="" type="checkbox"/> <b>Post High School training or some College</b> Post high school vocational education, non-college business, or technical or professional training, or some college credits <input checked="" type="checkbox"/> <b>Bachelors or Associates Degree</b> Post-Secondary degree: Bachelors or Associates <input checked="" type="checkbox"/> <b>Masters or Doctorate Degree</b> Post-Secondary degree: Masters or Doctorate
<input checked="" type="checkbox"/>	Child Care (Self Sufficiency Matrix)	
<input checked="" type="checkbox"/>	Children's Education (Self Sufficiency Matrix)	


Select the appropriate check box. Repeat this process for all the sufficiency domains. Click on the  button.

The Self Sufficiency Matrix summary redispays.

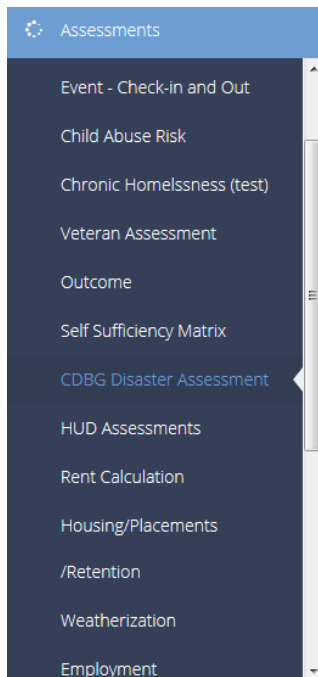
Self Sufficiency Matrix						<a href="#">Add New</a>
Total Rows: 3						
Outcome Date	Program	Assessment Event	Outcome Domain	Outcome Score	Value	
4/13/2015 12:00:00 AM	12 Permanent Housing for Homeless Disabled	During	Adult Education (Self Sufficiency Matrix)	High school diploma or G.E.D.	6.0000	
4/13/2015 12:00:00 AM	12 Permanent Housing for Homeless Disabled	During	Child Care (Self Sufficiency Matrix)	Child not enrolled in childcare	2.0000	
4/13/2015 12:00:00 AM	12 Permanent Housing for Homeless Disabled	During	Children's Education (Self Sufficiency Matrix)	Enrolled and Attending Regularly	10.0000	
					Total: 18.00	

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.

Edit Outcome Assessment	
Outcome Domain:	Child Care (Self Sufficiency Matrix)
Outcome Date:	04/13/2015 
Outcome Score:	<input checked="" type="checkbox"/> <b>Child enrolled in unregulated/unlicensed facility</b> Child enrolled in unregulated or unlicensed childcare facility <input checked="" type="checkbox"/> <b>Child not enrolled in childcare</b> Child not enrolled in childcare <input checked="" type="checkbox"/> <b>Child on waiting list for enrollment in childcare</b> <input checked="" type="checkbox"/> <b>Child provided childcare by family/friend</b> Child provided childcare by a family member or friend <input checked="" type="checkbox"/> <b>Child enrolled in care, subsidized, limited choice</b> Child enrolled in licensed, subsidized childcare, limited choice <input checked="" type="checkbox"/> <b>Child enrolled in care, subsidized, of own choice</b> Child enrolled in licensed, subsidized child care of own choice <input checked="" type="checkbox"/> <b>Child enrolled in care, unsubsidized or N/A</b> Child enrolled in unsubsidized, licensed childcare setting of own choice or Not Applicable

Make any desired changes and click on the  Save button.

## CDBG Disaster Assessment



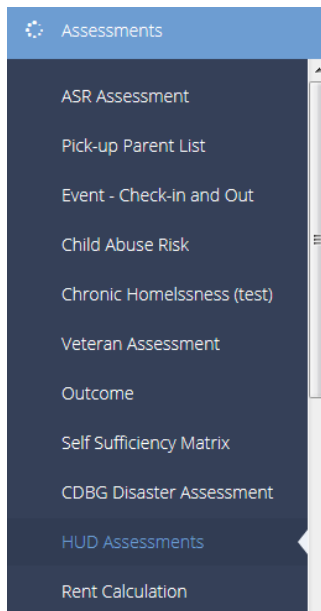
The next item on the Assessments menu is the "CDBG Disaster Assessment" summary form.

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 Date	Program	Assessment Event	Extent Of Damage
3/6/2015 10:53:00 AM	Adult Education	At Entry	Major

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 any property 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.

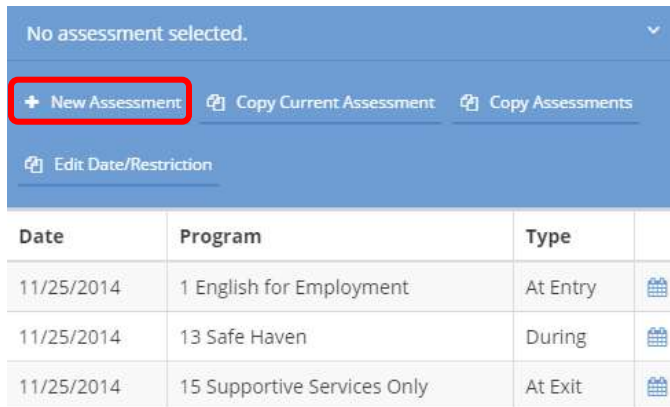


Before establishing an assessment, most HUD Assessments don't display any fields. During the process of selecting or creating an assessment, the user indicates which project enrollment and assessment event the assessment is for allowing the system to return the fields relevant to the particular scenario.









### Create a Brand-New Assessment

Click on the  portion of the Assessment field. The field expands.

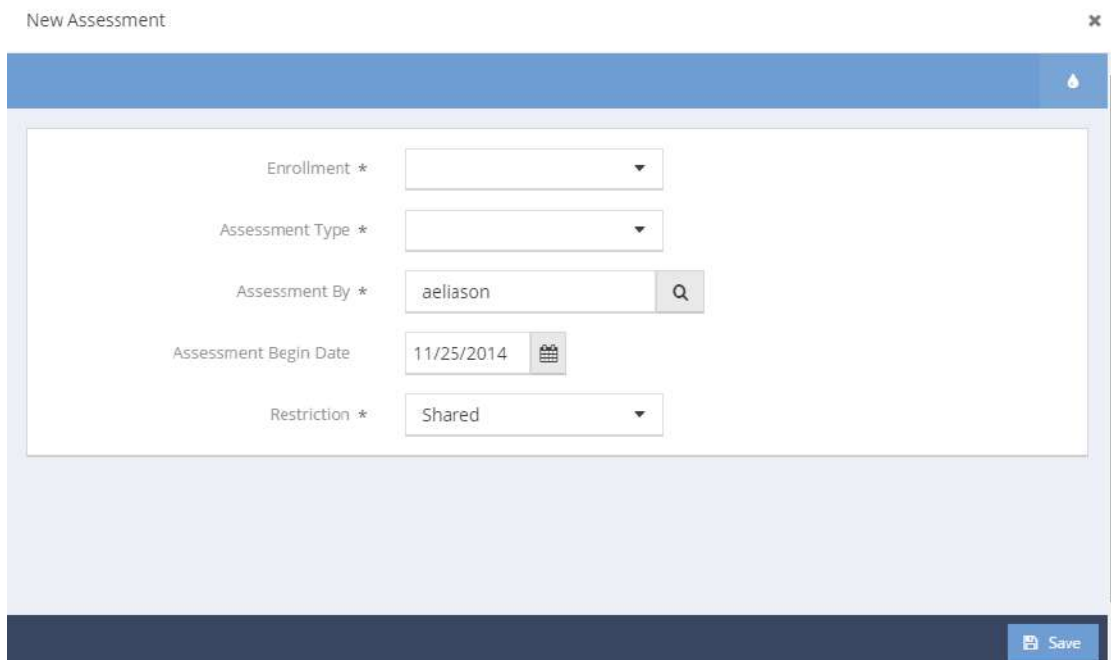


The expanded dropdown menu shows the following options:



- + New Assessment** (highlighted with a red box)
-  Copy Current Assessment
-  Copy Assessments
-  Edit Date/Restriction


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  button to create a new assessment. The New Assessment form displays.



The New Assessment form displays the following fields:

- Enrollment \*
- Assessment Type \*
- Assessment By \*  
- Assessment Begin Date  
- Restriction \*



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.




The screenshot shows a form with the following fields:
 

- Assessment Type \* (dropdown menu open)
- Assessment By \*
- Assessment Begin Date
- Restriction \*

 The dropdown menu for Assessment Type is open, showing the following options:
 

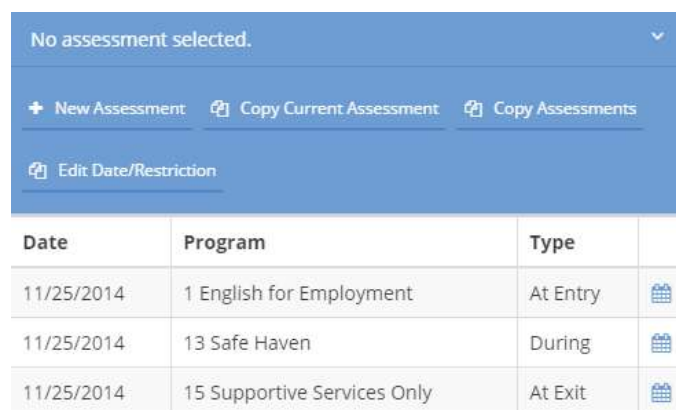
- Nothing--
- At Entry
- During
- At Exit
- Annual

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  portion of the Assessment field. The field expands.




The screenshot shows the expanded Assessment field. At the top is a blue header bar with the text "No assessment selected." and a dropdown arrow. Below this is a menu with the following options:
 

- + New Assessment
-  Copy Current Assessment
-  Copy Assessments
-  Edit Date/Restriction

 Below the menu is a table with the following data:
 

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  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.)

Copy Current Assessment List ✕

Date	Program Name	Type
<input checked="" type="radio"/> 11/25/2014	1 English for Employment	At Entry
<input type="radio"/> 11/25/2014	13 Safe Haven	During
<input type="radio"/> 11/25/2014	15 Supportive Services Only	At Exit

Copy
Cancel

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

Select Program Name ✕

Program Name:

1 English for Employment


Assessment Type:

At Entry ▼


Assessment Date:

11/25/2014 

Copy Assessments
Cancel

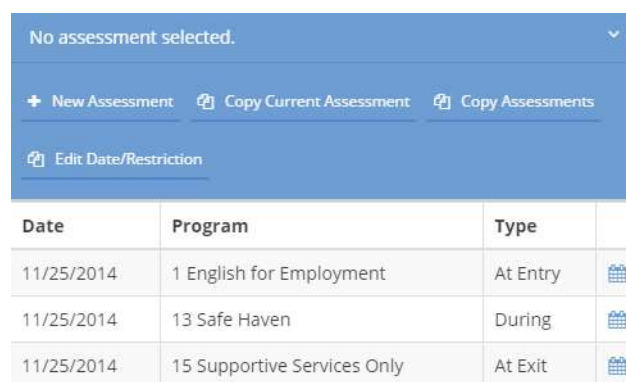
Indicate the desired assessment event for the new assessment and click the  button.




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  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.



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	

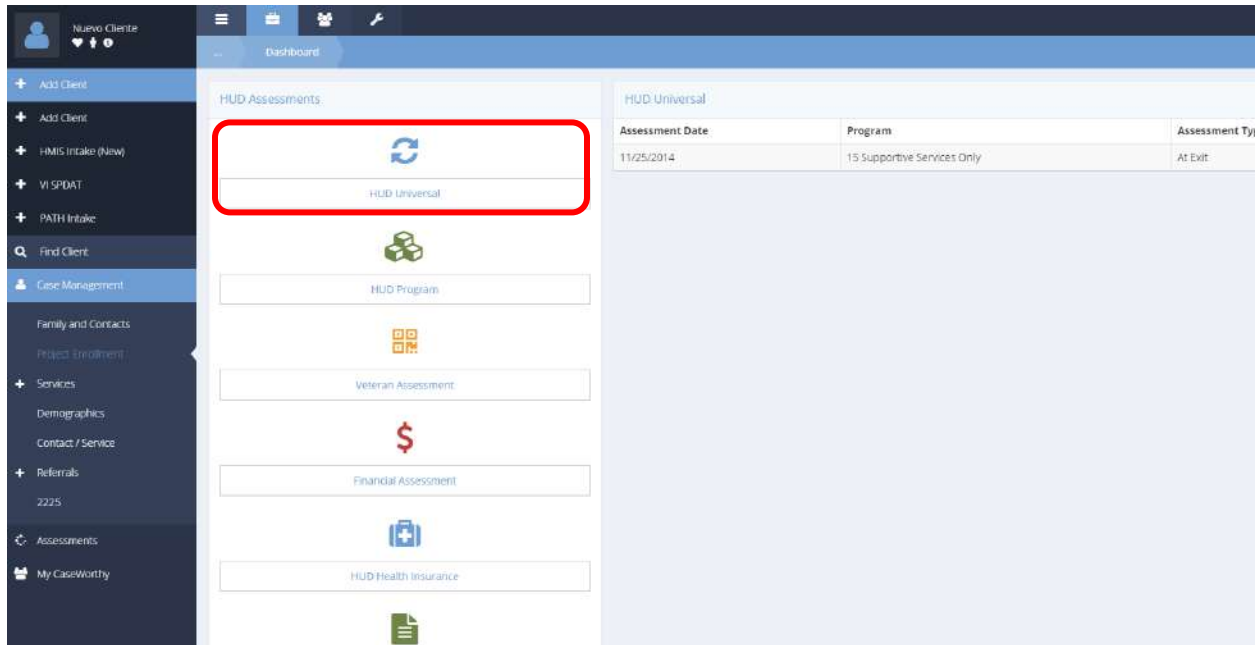
Select an assessment from the list to overwrite. The fields auto-populate with the previously saved assessment answers. Review the answers and edit them as appropriate. Click the  button.

**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.

HUD Universal Summary					+ Add New
Assessment Date	Program	Assessment Event	Chronic Homeless	System ID	
11/25/2014	1 English for Employment	At Entry	No	10997	
11/25/2014	15 Supportive Services Only	At Exit	No	10999	

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*

Select Provider Lookup

Provider Name

Address, City, State, Zip

Search

Provider Name	Address, City, State, Zip	COC Code
Auto Zone		2165412
Banner Health	1441 North 12th Street, AZ, Phoenix 85006	2165412ff
CaseWorthy	740 East 3500 South, UT, Salt Lake City 84107	123
TEST TEST		TL1444


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.

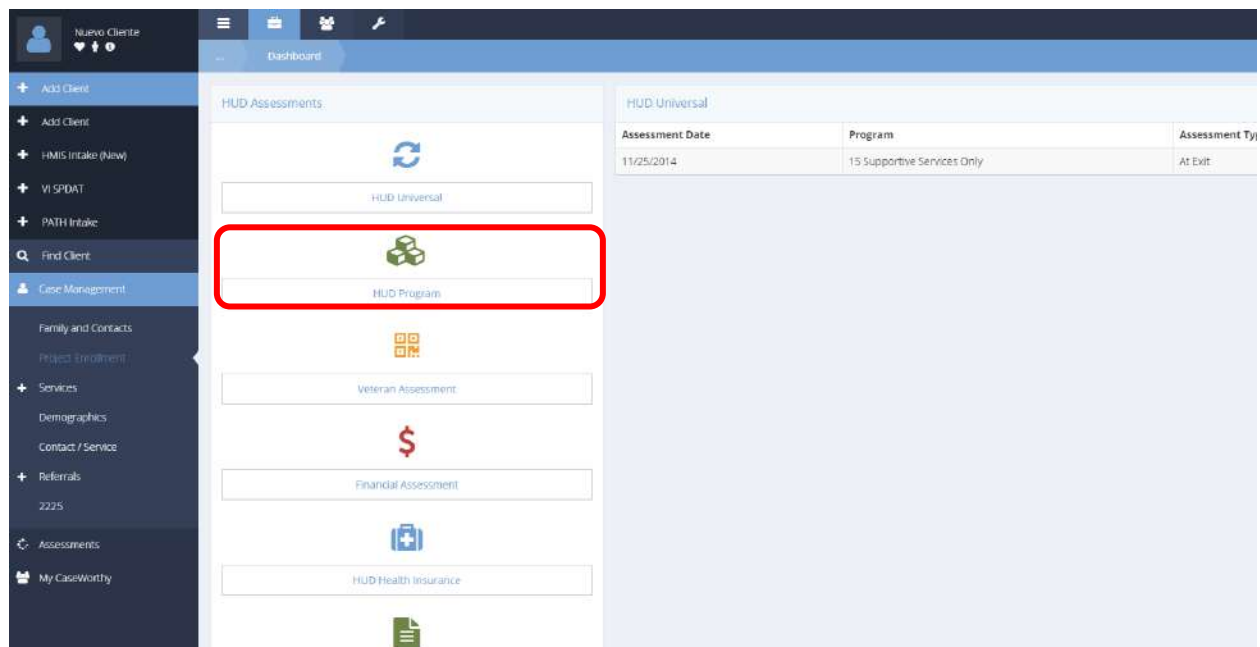
**Length of Time on Street, in an Emergency Shelter or Safe Haven section** appears when the client is the head of household for this enrollment or an adult, and the assessment type is entry.

**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  Save 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.

Assessment Date	Program	Assessment Event	System ID
11/25/2014	1 English for Employment	At Entry	10997
11/25/2014	13 Safe Haven	During	10998
11/25/2014	15 Supportive Services Only	At Exit	10999
11/25/2014	EmergencyShelter(PIT)	During	11002

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 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.

HUD Program Data

Assessment #
No assessment selected.

Exit Information

Project Completion Status
Exit Destination
Housing Assessment Disposition
Housing Assessment at Exit
New Housing Subsidy Info
Same Housing Subsidy Info

Housing Status

Housing Status

Residential Move-In Date

In Permanent Housing
Move-In Date

Domestic Violence

Domestic violence victim/survivor?
When experience occurred

Non-Cash Benefits from Any Source

Non Cash Benefit
Non Cash Benefits List
Choose Options...

Health Insurance

Health Insurance

Employment Information

Employed
Employment Type
Why Not Employed

General Health Status

General Health Status

Pregnancy Status

Pregnant
Due Date
Present

Disabling Conditions

Substance Abuse Problem	
Expected to be of long-continued and indefinite duration and substantially impairs ability to live independently	
Documentation of the disability and severity on file	
Currently receiving services/treatment for this condition	
How Confirmed	
Mental Health Problem	
Expected to be of long-continued and indefinite duration and substantially impairs ability to live independently	
Documentation of the disability and severity on file	
Currently receiving services/treatment for this condition	
How confirmed	
Serious mental illness (SMI) and, if SMI, how confirmed	
Developmental Disability	
Expected to substantially impair ability to live independently	
Documentation of the disability and severity on file	
Currently receiving services/treatment for this disability	
Chronic Health Condition	
Expected to be of long-continued and indefinite duration and substantially impairs ability to live independently	
Documentation of the disability and severity on file	
Currently receiving services/treatment for this condition	
HIV / AIDS	
Expected to substantially impair ability to live independently	
Documentation of the disability and severity on file	
Currently receiving services/treatment for this condition	
Physical Disability	
Expected to be of long-continued and indefinite duration and substantially impairs ability to live independently	
Documentation of the disability and severity on file	
Currently receiving services/treatment for this condition	

Save Cancel

**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

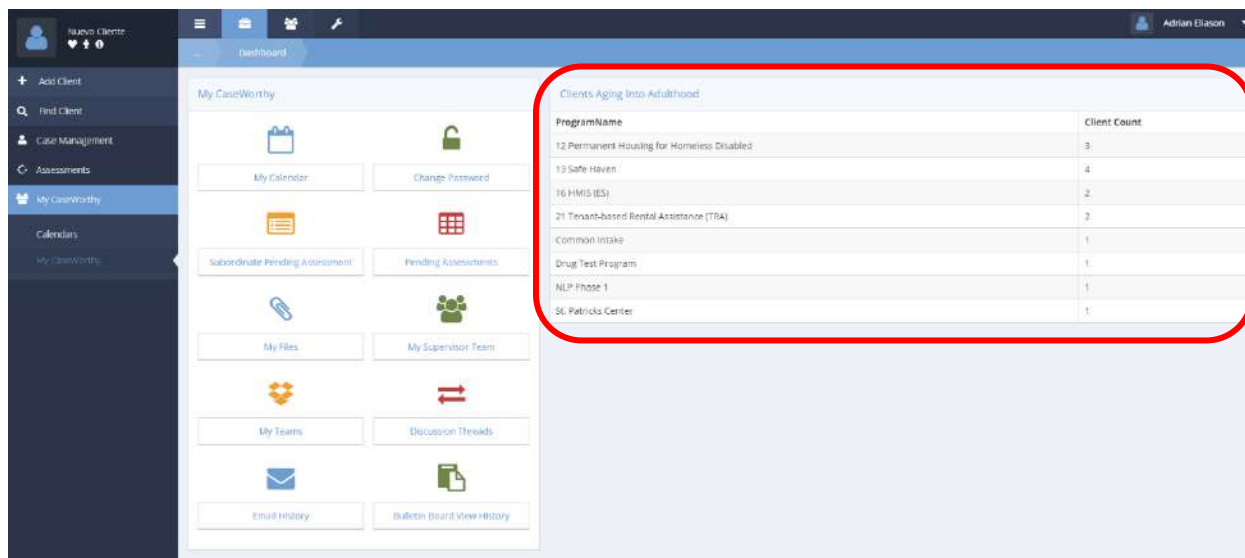
**NOTE: *Worst Housing Situation data element is not yet active as of release of CaseWorthy™ 5.0.1, per HUD Standards. The column does exist in the database and can be added to this assessment form upon receipt of federal funding by HUD for RHSAP.***

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 18<sup>th</sup> 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

















The screenshot shows the CaseWorthy dashboard with a sidebar on the left containing navigation links: Add Client, Find Client, Case Management, Assessments, My CaseWorthy, Calendars, and My CaseWorthy. The main content area displays a grid of icons for various functions like My Calendar, Change Password, Subordinate Pending Assessment, Pending Assessments, My Files, My Supervisor Team, My Teams, Discussion Threads, Email History, and Bulletin Board View History. A red box highlights a table titled 'Clients Aging Into Adulthood'.

ProgramName	Client Count
12 Permanent Housing for Homeless Disabled	3
13 Safe Haven	4
16 HMIS (ES)	2
21 Tenant-based Rental Assistance (TBRA)	2
Common Intake	1
Drug Test Program	1
NLP Phase 1	1
St. Patrick's Center	1

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*


HMIS Clients Aged Into Adulthood Since Entry								
Program: <input type="text"/>								
Total Rows: 14 <span>Search</span>								
First Name	Last Name	Birth Date	Days Since Entry	Project Name	Project Entry Date	Project Exit Date	Case Manager	Update Required Fields
New	person	10/10/1998	45	21 Tenant Based Rental Assistance (TBRA)	9/18/2014	12/31/9999 12:00:00 AM		
Chad	Mea	8/7/1995	109	21 Tenant Based Rental Assistance (TBRA)	9/18/2014	12/31/9999 12:00:00 AM		
Harbert	Harwood	5/3/1995	265	12 Permanent Housing for Homeless Disabled	8/27/2013	12/31/9999 12:00:00 AM		
Sandy	Sato	1/1/1999	329	16 HMIS (CS)	12/7/2010	12/31/9999 12:00:00 AM		
Scott	Tenn	1/1/1995	328	Common Intake	11/5/2014	12/31/9999 12:00:00 AM	crishome	
Test	Jane123	8/1/1995	85	16 HMIS (CS)	9/2/2012	12/31/9999 12:00:00 AM	JaneTice	
Sandy	Doe	3/1/1995	259	13 Safe Haven	2/6/2013	12/31/9999 12:00:00 AM		
Brown	Jack	1/3/1995	320	16 P Phase 1	2/13/2012	12/31/9999 12:00:00 AM		
Emma	Aiden	1/1/1995	328	Drug Test Program	1/2/2011	12/31/9999 12:00:00 AM		
Emma	Aiden	1/1/1995	328	Drug Test Program	1/2/2011	12/31/9999 12:00:00 AM		
Julie	Coastal	6/16/1994	99	12 Permanent Housing for Homeless Disabled	5/16/2012	12/31/9999 12:00:00 AM		
Mark	Hendricks	6/16/1994	162	13 Safe Haven	4/11/2013	12/31/9999 12:00:00 AM	emma	
Yest	test21	1/1/1994	328	St. Patrick Center	1/6/2012	12/31/9999 12:00:00 AM		

Click on the update  icon to process the client into adulthood in the system.




A workflow opens in a new window.





The screenshot shows a web browser window displaying a workflow form. The question is "Is this client a veteran?". Below the question are two radio buttons: "Yes" and "No". The "Yes" radio button is selected. The form is part of a larger application with a dark blue header and a light blue sidebar. The user's name "Adrian Eliason" is visible in the top right corner. A "Save" button is located at the bottom right of the form area.

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.

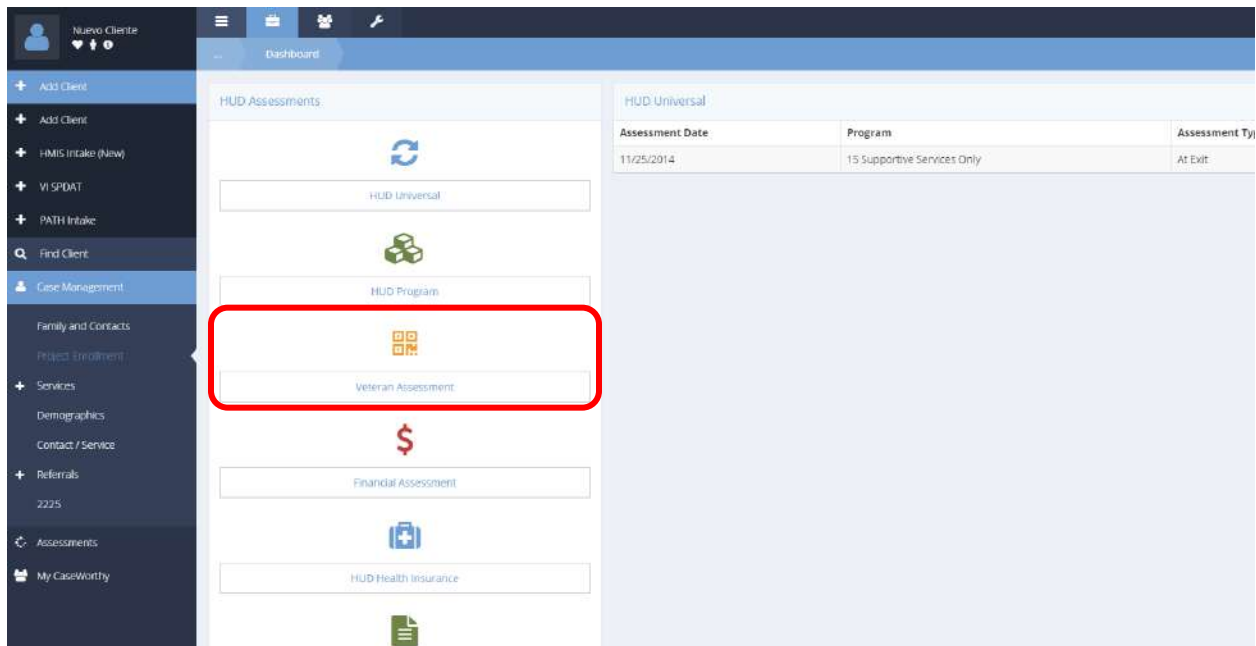
### Aged Into Adulthood Assessment

The screenshot shows the "Aged Into Adulthood Assessment" form. At the top, there are fields for "Information Date" (11/25/2014) and "Assessment by" (eliason). Below these are three main sections: "HUD Universal", "HUD Program", and "Restriction". Each section contains several dropdown menus for data entry. The "HUD Universal" section includes "Residence Prior to Project Entry" and "Length of Stay in Previous Place". The "HUD Program" section includes "Non-Cash Benefits from Any Source" and "Covered by Health Insurance". The "Restriction" section includes a "Restriction" dropdown menu.

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 field 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  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  button. The client drops from the list on the HMIS Clients Aged Into Adulthood Since Entry form. Click on the  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.

The screenshot shows the 'Veteran Assessment Summary' table. At the top right is a '+ Add New' button. The table has columns: 'Assessment Date', 'Assessment Event', 'Program', 'Date Entered Service', 'Date Separated', 'Discharge Status', 'Branch of Military', and 'System ID'. The first row contains the following data: '11/25/2014', 'During', '13 Safe Haven', '4/24/1981', '5/2/1986', 'Data not collected', 'Data Not Collected', and '10998'. A red rectangle highlights the action gear icon in the first row, and another red rectangle highlights the '+ Add New' button.

Assessment Date	Assessment Event	Program	Date Entered Service	Date Separated	Discharge Status	Branch of Military	System ID
11/25/2014	During	13 Safe Haven	4/24/1981	5/2/1986	Data not collected	Data Not Collected	10998

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.

**Assessment:** 11/25/2014 - 09 Head Start - At Entry

DD214 Order Date: [Text Field] [Calendar Icon]

DD214 Receive Date: [Text Field] [Calendar Icon]

Service Connected Disability: [Dropdown]

**Dates of Service:**

Branch of Military: [Dropdown]

Date Entered Service: [Text Field] [Calendar Icon]

Months of Active Duty: [Text Field]

Stand Down Event: [Dropdown]

Reserves: [Dropdown]

Date Separated From Service: [Text Field] [Calendar Icon]

Campaign Badge Veteran: [Dropdown]

Discharge Status: [Dropdown]

**Served in War Zone:**

Serve in a War Zone: Yes [Dropdown]

Months Served in a War Zone: [Text Field]

War Zone Name: [Dropdown]

Received Friendly or Hostile Fire: [Dropdown]

**Income and Address:**

Veteran Address Data Quality: Full address reported [Dropdown]

Percent of AMI: [Text Field]

Last Permanent Address: [Text Field] [Search Icon]


**Theatre of Operations:**

	Answer *
<input checked="" type="checkbox"/> Korean War (June 1950 – January 1955)	Yes [Dropdown]
<input checked="" type="checkbox"/> Iraq (Operation Iraqi Freedom)	Yes [Dropdown]
<input checked="" type="checkbox"/> Persian Gulf War (Operation Desert Storm)	
<input checked="" type="checkbox"/> World War II (September 1940 – July 1947)	
<input checked="" type="checkbox"/> Afghanistan (Operation Enduring Freedom)	
<input checked="" type="checkbox"/> Iraq (Operation New Dawn)	
<input checked="" type="checkbox"/> Vietnam War	
<input checked="" type="checkbox"/> Other Peace-keeping Operations or Military Interventions (such as Lebanon, Panama, Somalia, Bosnia, Kosovo)	

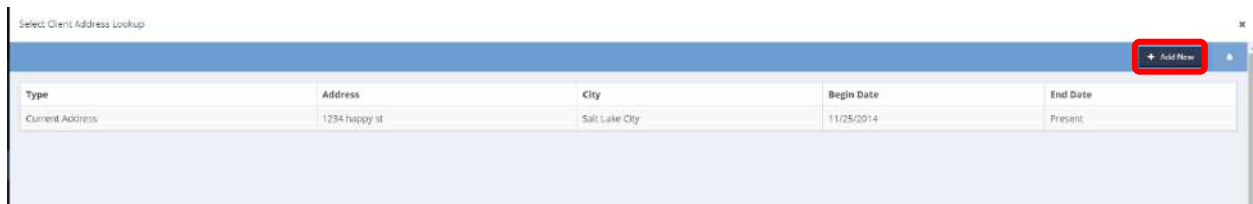
**War Zone Name, Months Served in a War Zone** and **Received Friendly or Hostile Fire** appear only if answering “Yes” to **Served in a War Zone**.

**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.

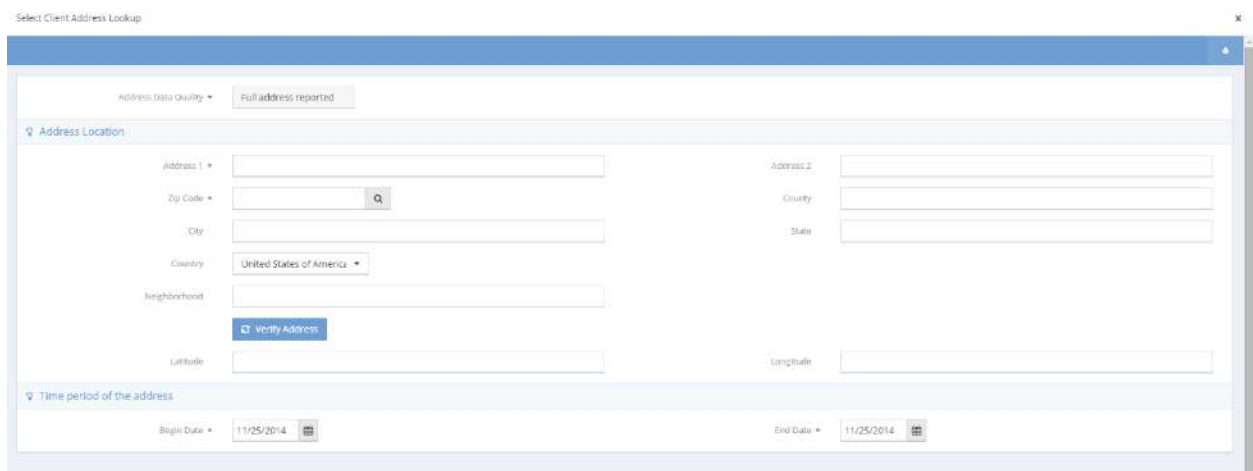
### *Client Address Veteran (Select)*



Type	Address	City	Begin Date	End Date
Current Address	1234 happy st	Salt Lake City	11/25/2014	Present

Select the desired address from the list displayed or click on the **+ Add New** button to enter a new address. The Veteran Last Permanent Address form displays.

### *Veteran Last Permanent Address*




Address Data Quality: Full address reported

**Address Location**

Address 1:

Address 2:

Zip Code:  

City:

Country: United States of America

Neighborhood:

Latitude:

Longitude:

**Verify Address**

**Time period of the address**

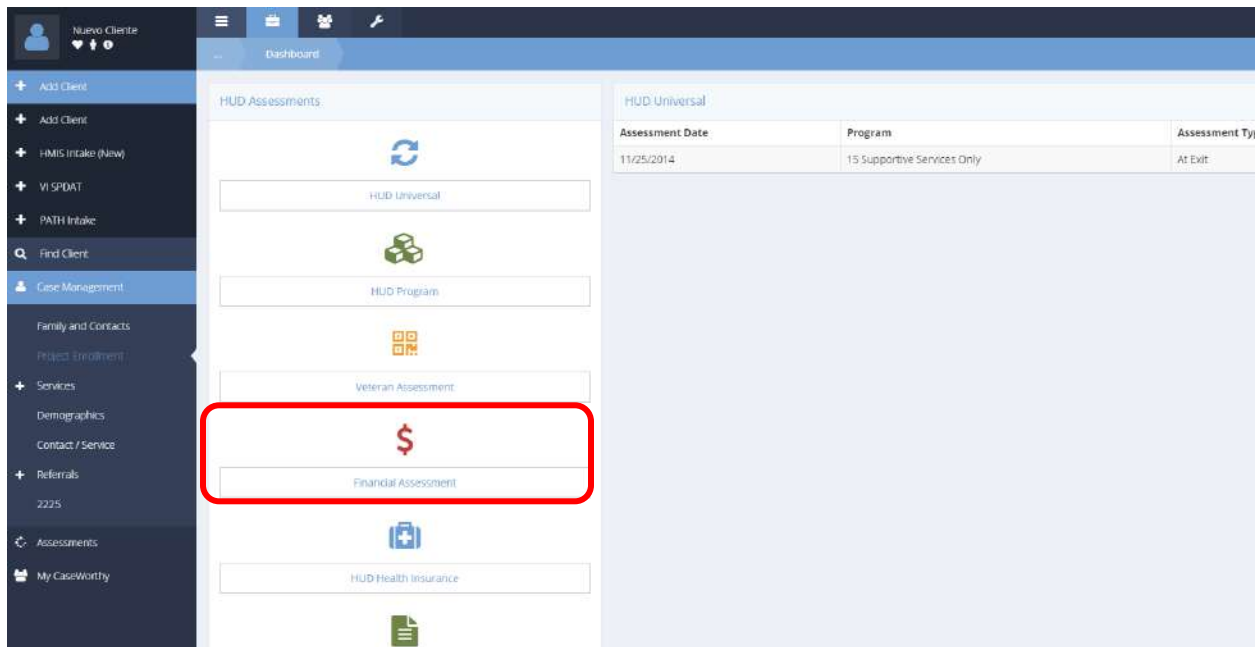
Begin Date: 11/25/2014

End Date: 11/25/2014

After completing the data entry and verifying the address, click on the **Save** 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.



Financial Assessment Summary							
Date	Program	Assessment Event	Total Income	Poverty	AMI Area	AMI	
11/25/2014	1 English for Employment	During	\$150.00	7.74%	Federal Uni...	3.48%	

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 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.

Income Type *	Category	Interval *	Amount *	Monthly Amount *
<input checked="" type="checkbox"/> Earned Income (i.e., employment income)	Income		\$0.00	\$0.00
<input checked="" type="checkbox"/> Unemployment Insurance	Income		\$0.00	\$0.00
<input checked="" type="checkbox"/> Supplemental Security Income (SSI)	Income		\$0.00	\$0.00
<input checked="" type="checkbox"/> Social Security Disability Income (SSDI)	Income		\$0.00	\$0.00
<input checked="" type="checkbox"/> VA Service-Connected Disability Compensation	Income		\$0.00	\$0.00
<input checked="" type="checkbox"/> Private disability insurance	Income		\$0.00	\$0.00
<input checked="" type="checkbox"/> Temporary Assistance for Needy Families	Income		\$0.00	\$0.00
<input checked="" type="checkbox"/> General Public Assistance (GA)	Income		\$0.00	\$0.00
<input checked="" type="checkbox"/> Retirement income from Social Security	Income		\$0.00	\$0.00
<input checked="" type="checkbox"/> VA Non-Service-Connected Disability Pension	Income		\$0.00	\$0.00
<input checked="" type="checkbox"/> Pension from a former job	Income		\$0.00	\$0.00
<input checked="" type="checkbox"/> Child support	Income		\$0.00	\$0.00
<input checked="" type="checkbox"/> All income or other financial support	Income		\$0.00	\$0.00

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  button. Otherwise, select the relevant income sources and enter an amount for each. Click on the  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.**

Assessment: HUD Financial Assessment

Sort Order: 2

Events: Choose Options...

Required Rule: ClientAge >= 18

Edit Rule

## Individual and Household Enrollment Members Financial Summaries

The screenshot shows the CaseWorthy dashboard with a sidebar on the left containing navigation links: 'Nuevo Cliente', 'Add Client', 'Find Client', 'Case Management', 'Assessments', 'HUD Assessments Dashboard', 'VA SPDAT / SPDAT', and 'My CaseWorthy'. The main content area displays 'HUD Assessments' with a list of assessment types: HUD Universal, HUD Program, Veteran Assessment, Financial Assessment, and HUD Health Insurance. On the right, there are three tables: 'HUD Universal', 'HUD Program', and 'Veteran'. Below these is the 'Financial - Individual Income' table, which is highlighted with a red box. This table has columns: Assessment Date, Program, Event, Total Income, PercentOfPoverty, AreaName, and PercentOfAMI. The data row shows: 11/25/2014, 1 English for Employment, During, \$150.00, 7.74%, Federal United States - 2011, 3.48%.

Assessment Date	Program	Event	Total Income	PercentOfPoverty	AreaName	PercentOfAMI
11/25/2014	1 English for Employment	During	\$150.00	7.74%	Federal United States - 2011	3.48%

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.

Financial Assessment Summary							Add New
Date	Program	Assessment Event	Total Income	Poverty	AMI Area	AMI	
11/25/2014	1 English for Employment	During	\$150.00	7.74%	Federal Untl...	3.48%	

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.

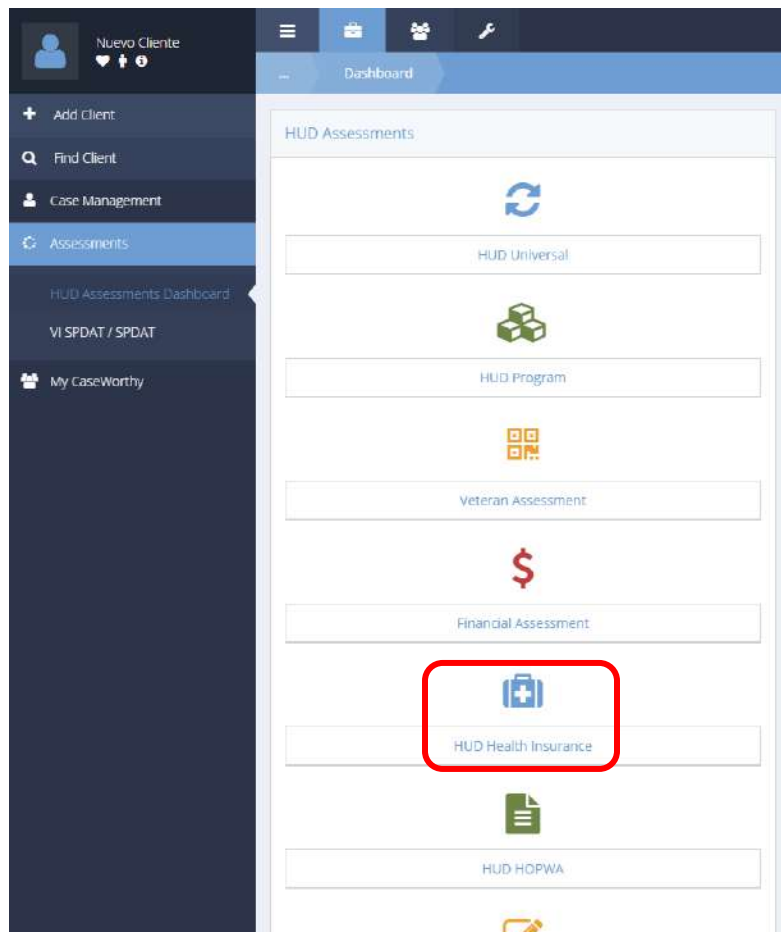
### *Enrollment Members Financial Summary*

Enrollment Members Financial Summary								Search
Assessment Date	Program	Assessment Event	Total Income	Poverty Total	Percent of Poverty	AMI Area Name	Percent OF AMI	
11/25/2014 12:00:00 AM	1 English for Employment	During	\$150.00	150.0000	9.97%	Federal United States - 2011	3.48%	

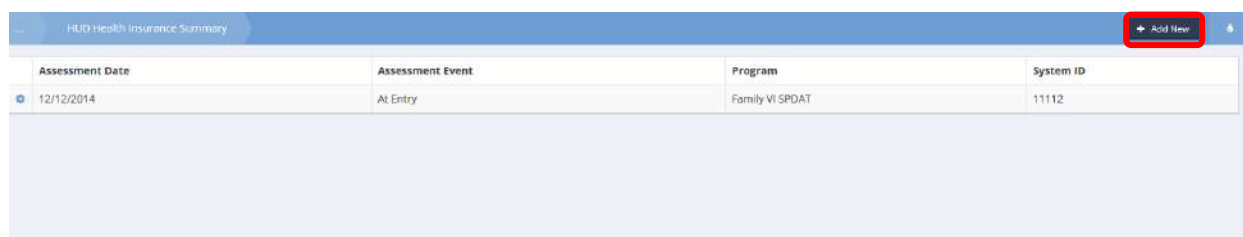


## HUD Health Insurance Assessment

**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.

The screenshot shows the top of the HUD Health Insurance Assessment form. The 'Assessment' dropdown menu is open, displaying 'No assessment selected.' with a downward arrow.

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.

The screenshot shows the 'Assessment' dropdown menu expanded. It includes a toolbar with the following options: **New Assessment**, **Copy Current Assessment**, **Copy Assessments**, and **Edit Date/Restriction**. Below the toolbar is a table of existing assessments:

Date	Program	Type	
12/31/2014	13 Safe Haven	At Entry	
12/31/2014	CC Immigration	At Entry	

Once the existing assessment is selected or a new assessment is started, the HUD Health Insurance Assessment form displays again.

The screenshot shows the HUD Health Insurance Assessment form with the 'Assessment' dropdown menu set to '4/8/2015 - 2 YAGA - During'. The form displays a table for 'Health Insurance Type' with a 'Yes/No \*' column.

Health Insurance Type	Yes/No *
<input checked="" type="checkbox"/> Medicaid	No
<input checked="" type="checkbox"/> Medicare	No
<input checked="" type="checkbox"/> State Children's Health Insurance Program	No
<input checked="" type="checkbox"/> VA	No
<input checked="" type="checkbox"/> Employer-Provided Health Insurance	No
<input checked="" type="checkbox"/> Health Insurance obtained through COBRA	No
<input checked="" type="checkbox"/> State Health Insurance for Adults	No
<input checked="" type="checkbox"/> Private Insurance	No


Answer all the assessment questions and click on the **Save** button when finished.



The HUD Health Insurance Summary form displays.



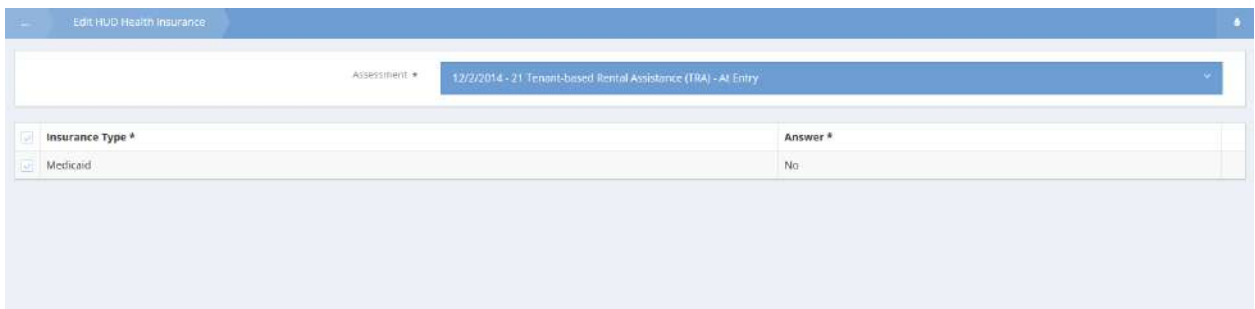
Assessment Date	Assessment Event	Program	System ID
12/2/2014	At Entry	21 Tenant-based Rental Assistance (TRA)	11054

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





Assessment Date	Assessment Event	Program	System ID
 	At Entry	21 Tenant-based Rental Assistance (TRA)	11054

The HUD Health Insurance Edit form displays.



Insurance Type *	Answer *
Medicaid	No

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  button when finished.

Edit HUD Health Insurance

Assessment: No assessment selected

Insurance Type: Medicaid

Assess: No, --Nothing--, Yes, No

## HUD HOPWA

**Navigation:** Case Management>Assessments>HUD Assessments Dashboard>HUD Assessments

Dashboard

HUD Program

Veteran Assessment

Financial Assessment

HUD Health Insurance

**HUD HOPWA**

HUD PATH

HUD PATH Fundamentals

Assessment Date	Program	Event
11/25/2014	1 English for Employment	During

Veteran

Assessment Date	Program	Assessment Type
11/25/2014	1 English for Employment	During

Financial - Individual Income

Assessment Date	Program	Event	Total Income	PercentOfPoverty	AreaName	PercentOfAMI
11/25/2014	1 English for Employment	During	\$150.00	7.74%	Federal United States - 2011	3.49%


Financial - Enrolled Household Income

Assessment Date	Program Name	Type	Total Income	Percent Of Poverty	AMI Area	Percent Of AMI
11/25/2014	1 English for Employment	During	\$150.00	9.97%	Federal United States - 2011	3.4%

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

HUD HOPWA Summary						<a href="#">+ Add New</a>
Assessment Date	Assessment Event	Program	Receiving Public HIV/AIDS Medical Assistance	Receiving ADAP	System ID	
11/25/2014	During	1 English for Employment	Yes	No	11020	

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.*

If No to "Receiving Public HIV/AIDS Medical Assistance" Reason \*

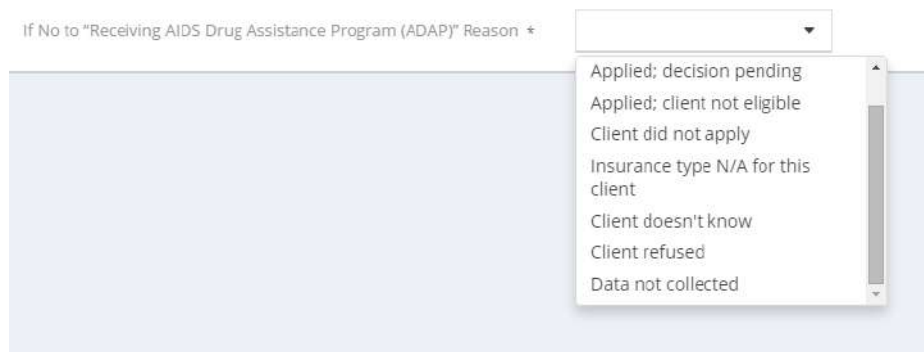
--Nothing--  
Applied; decision pending  
Applied; client not eligible  
Client did not apply  
Insurance type N/A for this client  
Client doesn't know  
Client refused

**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.**



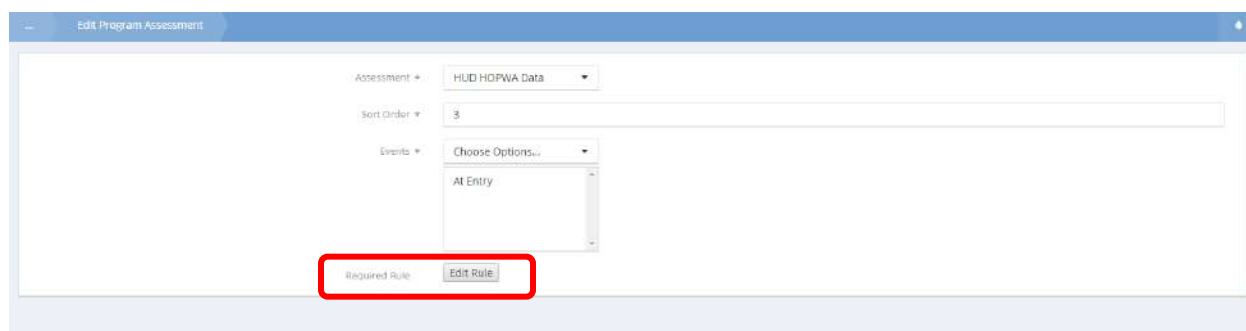
If No to "Receiving AIDS Drug Assistance Program (ADAP)" Reason ▼

- Applied; decision pending
- Applied; client not eligible
- Client did not apply
- Insurance type N/A for this client
- Client doesn't know
- Client refused
- Data not collected

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.*



Edit Program Assessment

Assessment ▼ HUD HOPWA Data

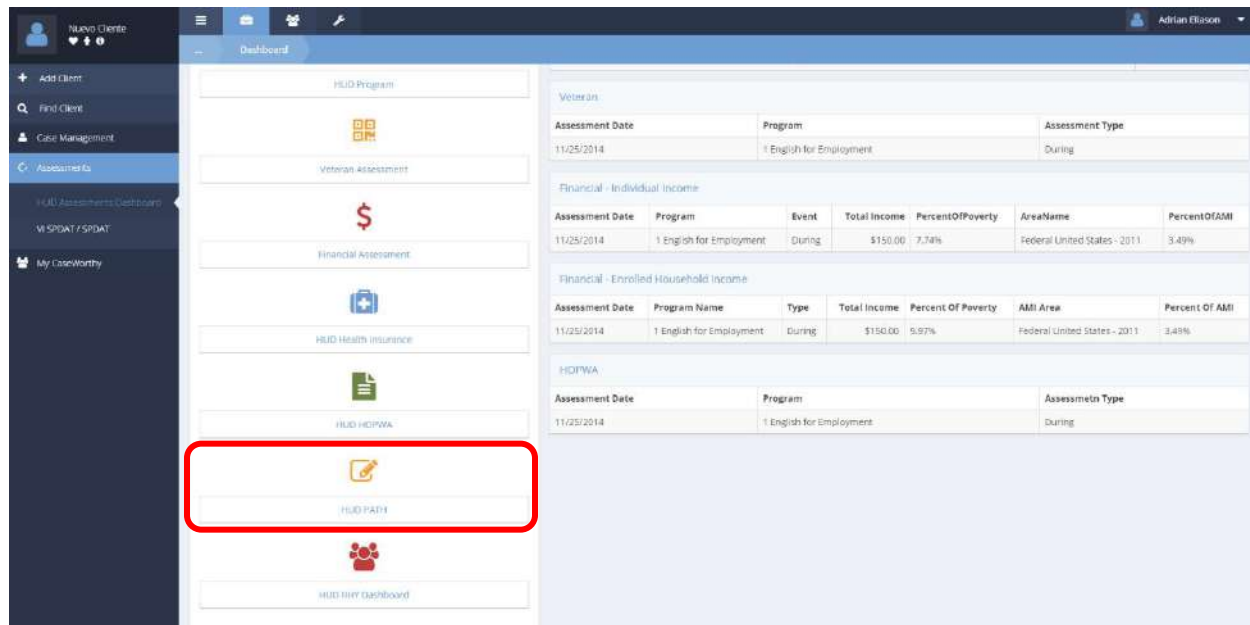
Sort Order ▼ 3

Events ▼ Choose Options...

At Entry

Required Rule [Edit Rule](#)

## 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*




Assessment Date	Assessment Event	Program	Client Became Enrolled in Path	System ID
11/25/2014	During	1 English for Employment		11022

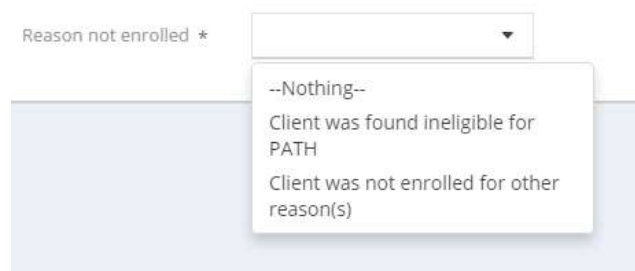
To edit or delete an entry, click on the action gear  icon associated with it. To add a new HUD PATH Assessment, click on the **+ Add New** button. The HUD PATH Data form displays.

### *HUD PATH Data*

Follow the steps in [The Assessment Manager](#) section of this document to create a new assessment or overwrite an existing one.

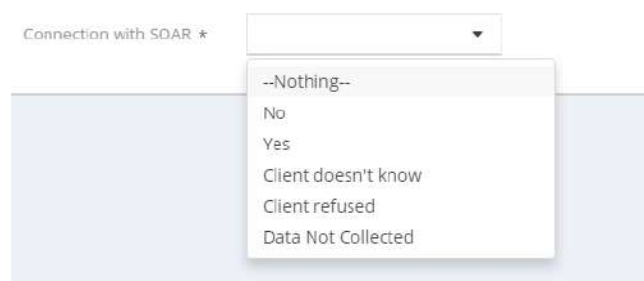
Once the assessment is established and the Assessment field shrinks, click on the down arrow  icon for the "Client became enrolled in PATH" field and select a value from the drop-down list that appears.

**Note:** If “No” is selected, a new field, “Reason not enrolled”, displays.


A screenshot of a web form showing a dropdown menu for the field 'Reason not enrolled \*'. The dropdown is open, displaying four options: '--Nothing--', 'Client was found ineligible for PATH', 'Client was not enrolled for other reason(s)', and an empty option at the bottom.

**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.

A screenshot of a web form showing a dropdown menu for the field 'Connection with SOAR \*'. The dropdown is open, displaying five options: '--Nothing--', 'No', 'Yes', 'Client doesn't know', and 'Data Not Collected'.

**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

The screenshot shows the CaseWorthy HUD Assessments Dashboard. On the left sidebar, the 'HUD RHY Dashboard' icon is highlighted with a red rectangle. The main content area displays various assessment data for a 'Veteran' client. The data is organized into several sections:

- Veteran**

Assessment Date	Program	Assessment Type
11/25/2014	1 English for Employment	During
- Financial - Individual Income**

Assessment Date	Program	Event	Total Income	PercentOfPoverty	AreaName	PercentOfAMI
11/25/2014	1 English for Employment	During	\$150.00	7.74%	Federal United States - 2011	3.49%
- Financial - Enrolled Household Income**

Assessment Date	Program Name	Type	Total Income	Percent Of Poverty	AMI Area	Percent Of AMI
11/25/2014	1 English for Employment	During	\$150.00	9.07%	Federal United States - 2011	3.49%
- HOPWA**

Assessment Date	Program	Assessment Type
11/25/2014	1 English for Employment	During
- HUD PATH**

Assessment Date	Program	Assessment Type
11/25/2014	1 English for Employment	During


Click on the HUD RHY Dashboard icon on the HUD Assessments Menu. The RHY Assessments Dashboard displays.

*RHY Main Assessment*

The screenshot shows the RHY Assessments Dashboard. The 'RHY Main Assessment' icon is highlighted with a red rectangle. The dashboard also shows 'RHY Critical Issues' and 'HUD RHY Exit' options.


Click on the RHY Main Assessment icon on the RHY Assessments Dashboard. The HUD RHY Data Summary form displays a list of existing assessments.


HUD RHY Summary			
Begin Assessment		Assessment Event	Program
11/25/2014		During	1 English for Employment
		System ID	
		11020	

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.

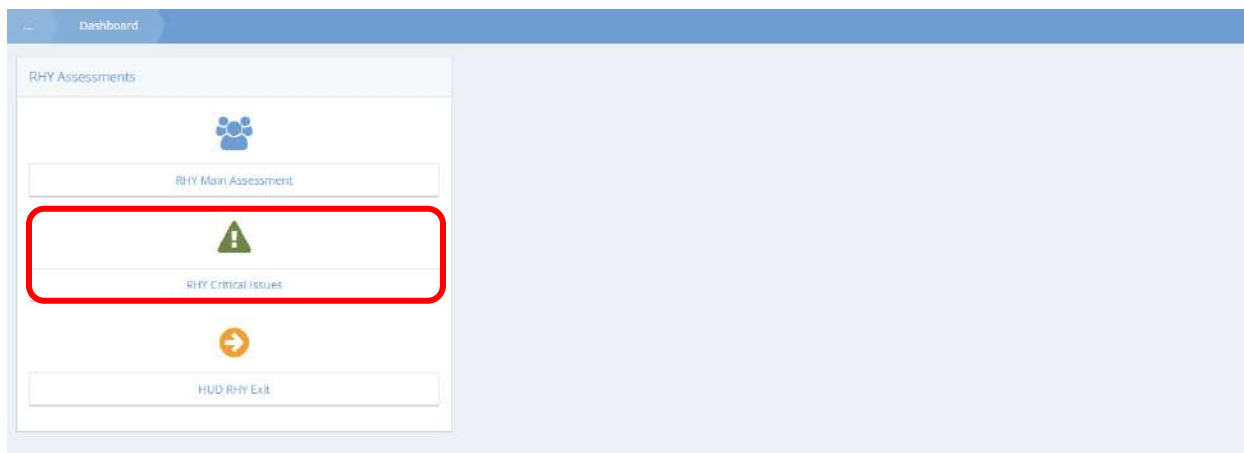
HUD RHY Data	
HUD RHY	
Assessment	12/2/2014 - CC Health Related Services - At Entry
Date of Status Determination	<input type="text"/>
FYSB Youth	<input type="text"/>
Sexual Orientation *	<input type="text"/>
Last Grade Completed *	<input type="text"/>
School Status *	<input type="text"/>
Dental Health Status *	<input type="text"/>
Mental Health Status *	<input type="text"/>
Formerly a Ward of Child Welfare/Foster Care Agency *	<input type="text"/>
Formerly a Ward of the Juvenile Justice System *	<input type="text"/>
Referral Source *	<input type="text"/>
Received something in exchange for sex in the past 3 months *	<input type="text"/>

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.

HUD RHY Young Person's Critical Issues

Assessment \* 12/2/2014 - CC Health Related Services - At Entry

Young Person's Critical Issues

Issue Description *	Answer *
<input checked="" type="checkbox"/> Household Dynamics	
<input checked="" type="checkbox"/> Sexual Orientation/Gender Identity - Youth	
<input checked="" type="checkbox"/> Sexual Orientation/Gender Identity - Family member	
<input checked="" type="checkbox"/> Housing Issues - Youth	
<input checked="" type="checkbox"/> Housing Issues - Family member	
<input checked="" type="checkbox"/> School or Educational Issues - Youth	
<input checked="" type="checkbox"/> School or Educational Issues - Family member	
<input checked="" type="checkbox"/> Unemployment - Youth	
<input checked="" type="checkbox"/> Unemployment - Family member	
<input checked="" type="checkbox"/> Mental Health Issues - Youth	


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

Dashboard

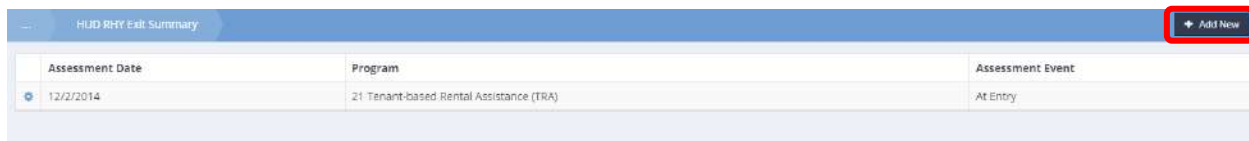
RHY Assessments

  
RHY Main Assessment


  
RHY Critical Issues

  
HUD RHY Exit

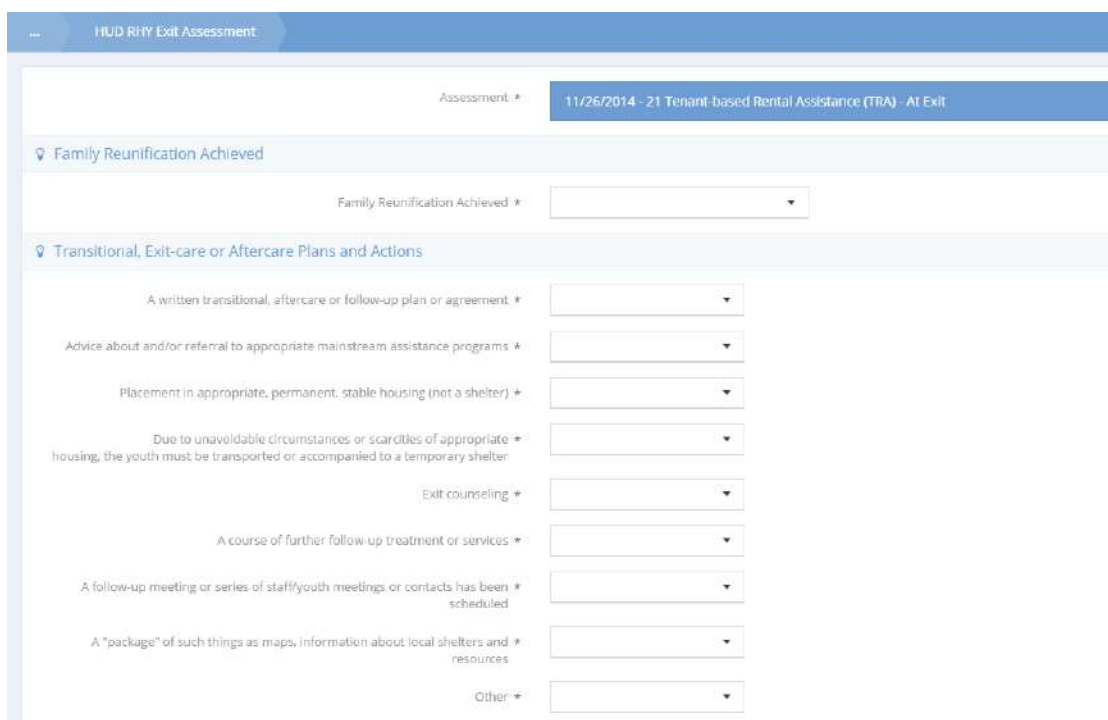
From the RHY Assessments dashboard, click on the HUD RHY Exit icon. The HUD RHY Exit Summary form displays a list of existing exit assessments.



HUD RHY Exit Summary			<a href="#">+ Add New</a>
Assessment Date	Program	Assessment Event	
12/2/2014	21 Tenant-based Rental Assistance (TRA)	At Entry	

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.



HUD RHY Exit Assessment

Assessment: 11/26/2014 - 21 Tenant-based Rental Assistance (TRA) - At Exit

Family Reunification Achieved

Family Reunification Achieved \*

Transitional, Exit-care or Aftercare Plans and Actions

A written transitional, aftercare or follow-up plan or agreement \*

Advice about and/or referral to appropriate mainstream assistance programs \*

Placement in appropriate, permanent, stable housing (not a shelter) \*

Due to unavoidable circumstances or scarcities of appropriate housing, the youth must be transported or accompanied to a temporary shelter \*


Exit counseling \*

A course of further follow-up treatment or services \*

A follow-up meeting or series of staff/youth meetings or contacts has been scheduled \*

A "package" of such things as maps, information about local shelters and resources \*

Other \*

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.

Assessment Date	Program	Assessment Event	Utility Reimbursement	Actual Rent Paid
5/16/2016	CC Emergency Services	During	\$150.00	\$0.00

To edit a calculation, click on the action gear  icon and select Rent Calculation from the menu options.

Assessment Date	Program	Assessment Event
5/16/2016	CC Emergency Services	During

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

The Rent Calculation Worksheet uses the following information to determine rent amount. Please ensure that all family members are enrolled, and that disabilities and financial information are recorded for each enrolled member.

Total Rows: 1

Assessment Date	Program	Assessment Event	Utility Reimbursement	Actual Rent Paid
5/16/2016	CC Emergency Services	During	\$150.00	\$0.00

The Rent Calculation form displays.

Assessment: 5/16/2016 - CC Emergency Services - During

Please verify that this information is correct.

Number of Children	<input type="text" value="5"/>	Dependent Deduction	<input type="text" value="480.00"/>
Disability Deduction	<input type="text" value="400.00"/>	Child Care Per Month	<input type="text" value="52.00"/>
Medical Disability	<input type="text" value="50.00"/>	Utility Allowance	<input type="text" value="150.00"/>
Rent *	<input type="text" value="899.00"/>		

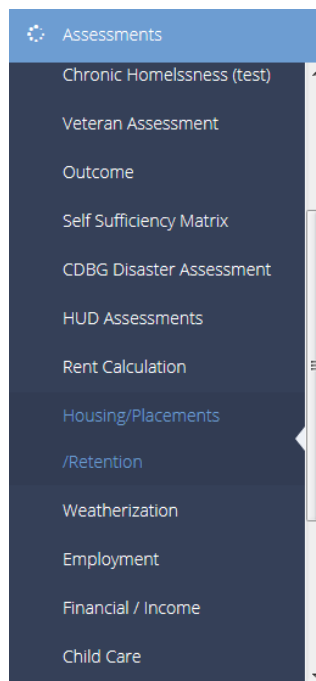
Part A

1. Total Family Monthly Income	<input type="text" value="0.00"/>
2. Minimum Family Contribution	<input type="text" value="0.00"/>
3. Gross Annual Income	<input type="text" value="0.00"/>
4. Total Dependent Deduction	<input type="text" value="2400.00"/>
5. Child Care Deduction Per Mo	<input type="text" value="52.00"/>
6. Total Disability Deduction	<input type="text" value="0.00"/>
7. Medical Disability	<input type="text" value="50.00"/>

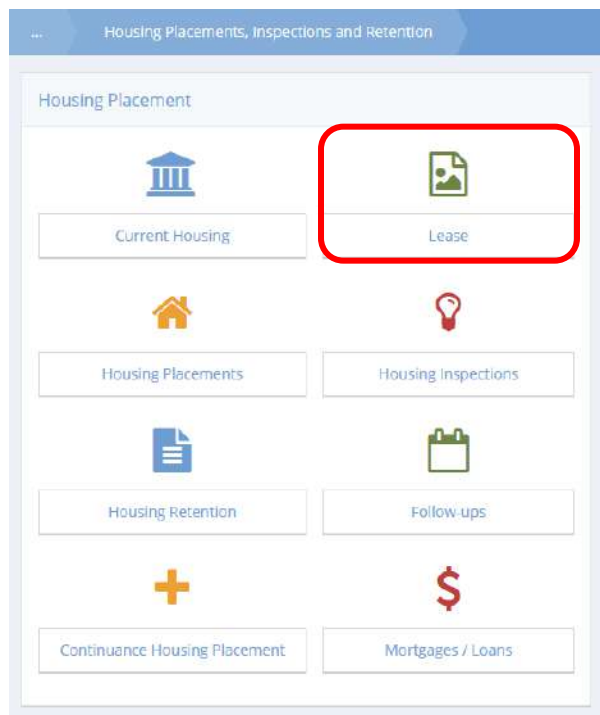
**Calculate Rent** **Cancel**

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.

Housing Placement Lease Summary				
Total Rows: 1				
Lease Begin Date	Lease End Date	Landlord Name	Housing Type	Monthly Rent
3/6/2015 12:00:00 AM	7/3/2015	CaseWorthy	House	\$500.00

Housing Placement Lease

Assessment

No assessment selected.

Housing Type

Find Landlord

Lease Type

Lease Begin

Date

Lease End

Date

Number Of Occupants

Lease Amount

0.00

Show Subsidies

Lease Deposit

0.00

Utility Deposit

0.00

Pet Deposit

0.00

Other Deposit Type

Utility Deposit Account

Pet Deposit Account

Other Deposit Amount

0.00

Utility Amount

0.00

Utilities Included in Lease

Choose Options...

Meal (s) Amount

0.00

Cable Amount

0.00

HOA Amount

0.00

LIABA Amount

0.00

Phone Amount

0.00

Housing information

Total Sq/feet

Address1  Address2

City  State

Zip Code

# Bedrooms  Storage

# Baths  Parking

Post Placement ☐ Schedule Follow Up ☐

Post Outcome ☐

Case Note

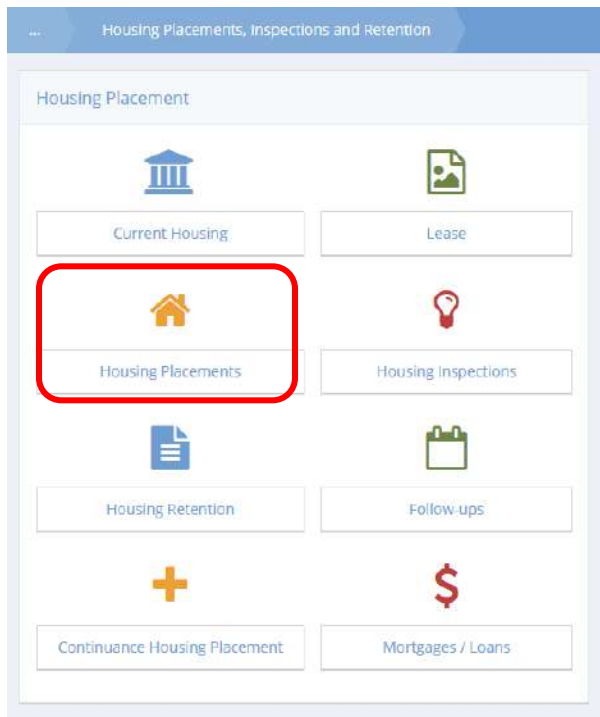
Access payment terms or print the lease from the Housing Lease Summary form.


Housing Placement Lease Summary

Total Rows: 1

<input type="checkbox"/>	<input type="button" value="Edit"/>	<b>Lease End Date</b>	<b>Landlord Name</b>	<b>Housing Type</b>	<b>Monthly Rent</b>
<input type="checkbox"/>	<input type="button" value="\$ Payment Terms"/> <input type="button" value="Print Lease"/> <input type="button" value="Delete"/>	7/3/2015	CaseWorthy	House	\$500.00

## 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.



The screenshot shows the "Enter Housing Placement Outcome" form. It includes several input fields:
 

- Assessment: No assessment selected.
- is continuance: ☐
- Housing Type: Trailer Park
- Apply Date: 03/06/2015
- Placed By**: (highlighted with a red rectangle)
- Placement Status**: Pending (highlighted with a red rectangle)
- Landlord Name: (with a search icon)

Inspection: Select the inspection type, scheduled date and inspection status.

Inspection with Outcome

Record the Housing Inspection Information

Inspection Type: Initial

Schedule Date: 03/06/2015

Inspection Status: Open

Assigned Team: [Search]

Post Follow-Up: [Icon]

Inspector Information

Inspector: [Search]

Office Phone: [Field]

Cell Phone: [Field]

Inspector Email Address: [Field]

Phone Ext: [Field]

Housing Property Information

Property Name: CaseWorthy

Address: 740 East 3900 South

City: Salt Lake City

State: UT

Phone: 801-888-9999

Address2: [Field]

Inspection Note: [Case Note]

Retention: Enter the follow-up date and type. Select the verifying user and the method by which they verified.

Edit Housing Placement Retention

Follow-up Date: 03/06/2015

Follow-up Type: [Dropdown]

Rating: [Search]

Verification Method: [Dropdown]

User Verifying: [Search]

Behind On Payments: [Dropdown]

Needed Repairs: Choose Options...

Enter information about additional members that have moved into the home

Has anyone else moved in with you: [Dropdown]

How are you feeling about your new home?

Do you feel safe - Day?: [Dropdown]

Do you feel safe - Night?: [Dropdown]

Are you lonely?: [Dropdown]


Case Note: [Case Note]

WF\_FindDays: [Field]

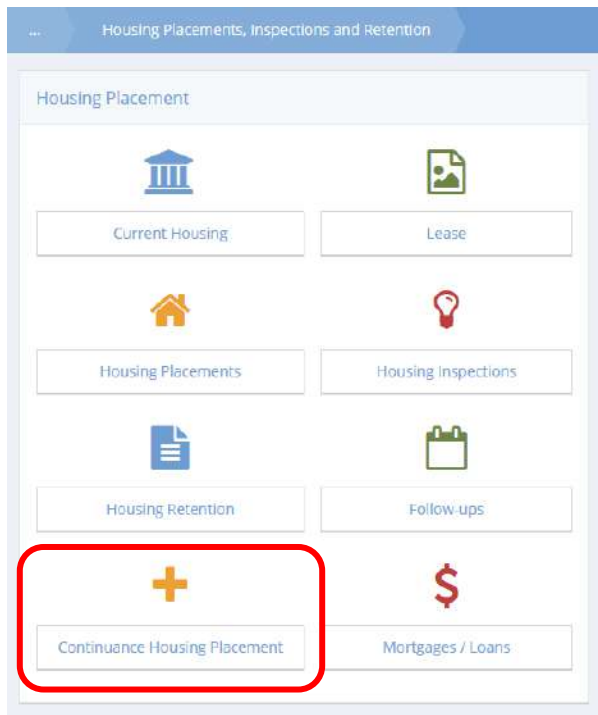
Case Note: [Case Note]

Follow-Up: Select a follow-up type and status, then assign the follow up to a team and a team member if necessary.

The screenshot shows the 'Add Housing Placement Followup' form. The form is divided into several sections. The top section contains two dropdown menus: 'FollowUp Type' and 'Status'. The 'Status' dropdown is currently set to 'Open'. Below these are date pickers for 'Begin Date' (03/06/2015) and 'End Date'. A note below the date pickers states: 'When changing the "Assigned Team" also change the "Team Member".' Below this note are two more dropdown menus: 'Assigned Team' and 'Team Member'. The bottom section is titled 'Lease and Landlord Information' and contains several text input fields: 'Lease Begin Date' (03/06/2015), 'Lease End Date' (07/03/2015), 'Housing Type' (House), 'Landlord Name' (CaseWorthy), 'Address 1' (740 East 3900 South), 'Address 2' (Apt. 1), 'City' (Salt Lake City), 'State' (UT), and 'Phone' (801-888-99).

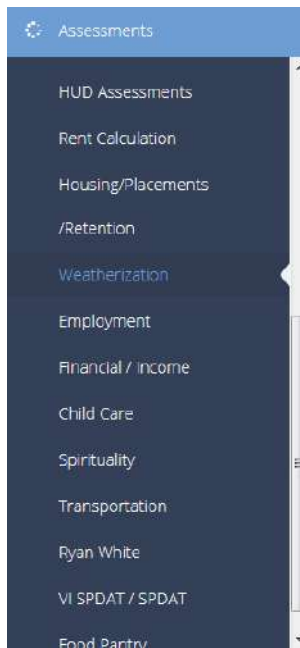
Click on the "Housing Inspection" icon, the "Housing Retention" icon or the "Follow-Ups" icon to access each respective summary form. As shown above, add a new inspection, retention or follow-up from the action gear  on the housing placement summary form.

## 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.

The image shows the 'Weatherization Summary' form. At the top, there is a blue header bar with the title 'Weatherization Summary' and an 'Add New' button. Below the header, there is a table with the following data:

Assessment Date	Program	Assessment Event	Home Type	Year Built	Primary Heat
2/24/2015 11:54:00 AM	Adult Education	During		1985	

Below the table, there is a section titled 'Enter Weatherization Information' with various input fields:

- Assessment: No assessment selected.
- Type Of Assistance: [Dropdown]
- Enter the home type, year built and ownership information:
  - Type Of Home: [Dropdown]
  - Year Built: 1985
- Provide ownership or lease information:
  - Units By Occupancy: [Dropdown]
  - Unit Size (SQ feet): [Text]
  - # of Months Owned: [Text]
- Enter the primary and secondary heating sources, providers and accounts:
  - Primary Heating Source: [Dropdown]
  - Secondary Heating Source: [Dropdown]
  - Cooling Source: [Dropdown]

## 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.

...

Offender Screening Tool Assessment Summary

+ Add New

	Date	Created By	Phy Health	Voc/Financial	Education	Family/Social	Residence	Alcohol	Drug Abuse	Mental Health	Attitude	Criminal Behavior	Total Score
⚙	5/31/2016	doc.	0	2	2	5	1	1	2	1	4	6	24

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  button.



Upon clicking Edit or the **+ Add New** button, the Offender Screening Tool Input Form displays.

Offender Screening Tool Input Form

I. PHYSICAL HEALTH/MEDICAL

Assessment \*

No assessment selected.

Health Status (a) \*

Health Limitations (b) \*

Physical Health/Medical Total

Physical Health/Medical Percentage

II. VOCATIONAL/FINANCIAL

Current verified employment (or verifiable employment if currently incarcerated) \*

How many times has the client been unemployed (30 days or more) in the past 3 years? \*

Has the client ever been fired or asked to resign from a job within the last 3 years? \*

Current Financial Situation \*

Receives regular support through assistance \*

Vocational/Financial Total

Vocational/Financial Percentage

III. EDUCATION

Level of formal education \*

Ever suspended or expelled from school \*

Reading ability (from the WIAT) \*

Education Total

Education Percentage

IV. FAMILY and SOCIAL RELATIONSHIPS

Was the client raised primarily by a biological parent? \*

Did the client live in the family home until age 16? \*

Does anyone in the client's family (parents or siblings) have a criminal record? \*

What is the status of the current family relations? \*

What is the client's childhood history of domestic violence (as victim or witness)? *	<input type="text"/>
What best describes the client's current most significant companion/romantic relationship? *	<input type="text"/>
What best describes the client's current peer and/or associate relationships? *	<input type="text"/>
Does the client associate with at least one prosocial person on a regular basis? *	<input type="text"/>
Family and Social Total	<input type="text"/>
Family and Social Percentage	<input type="text"/>

#### V. RESIDENCE and NEIGHBORHOOD

Client's current residential arrangement (if in jail, use the 6-month period before reincarceration) *	<input type="text"/>
Stability of client's residence *	<input type="text"/>
Residence and Neighborhood Total	<input type="text"/>
Residence and Neighborhood Percentage	<input type="text"/>

#### VI. ALCOHOL

Total number of alcohol-related arrests *	<input type="text"/>
Effect alcohol use had on client's lifestyle for the one month leading up to the present *	<input type="text"/>
Client's self-perception *	<input type="text"/>
Alcohol Total	<input type="text"/>
Alcohol Percentage	<input type="text"/>

#### VII. DRUG ABUSE (including present offense)

Any drug use over the past year? *	<input type="text"/>
Effect of drug use in the one month leading up to the present offense? *	<input type="text"/>
Client's self-perception *	<input type="text"/>
Drug Abuse Total	<input type="text"/>
Drug Abuse Percent	<input type="text"/>

#### VIII. MENTAL HEALTH

History of mental illness (including suicide attempts) *	<input type="text"/>
----------------------------------------------------------	----------------------

Current mental health functioning \*

Mental Health Total

Mental Health Percentage

**IX. ATTITUDE**

Does client have attitudes supportive of crime? \*

Does client have attitudes that are non-conforming to societal norms? \*

Does client have a poor attitude about his/her current offense? \*

Does client have a poor attitude about community supervision? \*

Does client have a poor attitude toward authority figures? \*

According to the Screener, what is the client's motivation level to improve his/her life? \*

According to the Screener, this client's need for improvement in attitude is \*

Attitude Total

Attitude Percentage

**X. CRIMINAL BEHAVIOR**

Age of first arrest \*

Number of Prior Juvenile Adjudications and Adult Legal Involvements? \*

Prior Juvenile or Adult Probation/Parole Revocations (no reinstatements)? \*

If there are previous involvements, does the present offense generally represent an increase in seriousness to the most recent involvement? \*

Present Offense Designation \*

Does the offender have any previous felony convictions? \*

Is the present offense violent? \*

Does the offender have at least one previous violent conviction? \*

Does the offender have two or more previous violent convictions? \*

Criminal Behavior Total

Criminal Behavior Percentage

**TOTAL OST SCORE (Sum of all 10 category totals) Low Risk: 0 - 6 Medium Risk: 7 - 20 High Risk: 21 - 44**

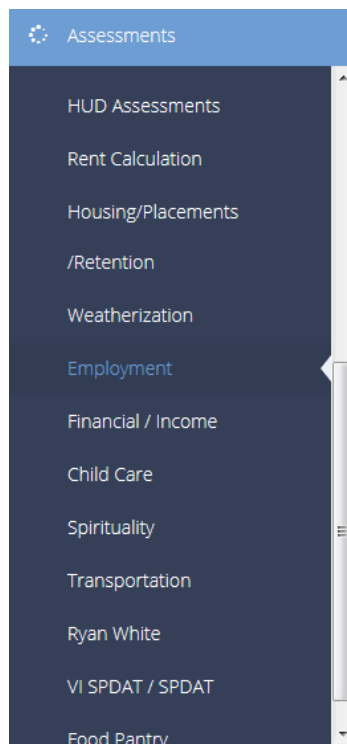
Risk Level

**Save** **Cancel**

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 **Save** 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.

The screenshot shows the "Employment Assessment Summary" form. It includes a table with one row of data and a section for inputting assessment details.


Assessment Date	Program	Assessment Event	Employed	Type Of Work	Case Note
2/24/2015 11:54:00 AM	Adult Education	During	False	Full Time	

Below the table, there is a section for "Employment Assessment Input". It includes a dropdown for "Assessment" (No assessment selected), a checkbox for "Employed", a dropdown for "Restrictions to Work" (Choose Options...), and a dropdown for "Type of Work You're Looking For?".

At the bottom, there is a "Case Note" section with a "Case Note" button.

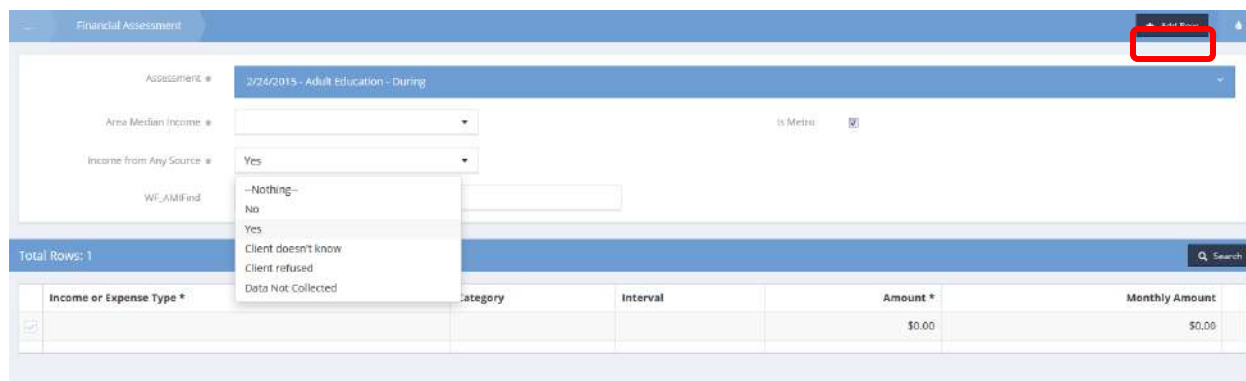
## Financials

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.

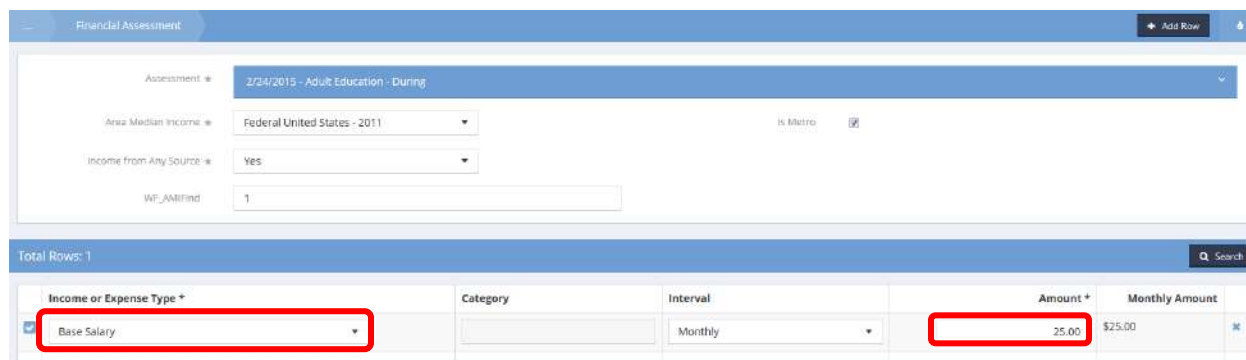
From the action gear  on the summary form, the user can also add non-monthly cash equivalents. In a standard financial assessment, click **+ Add New (Non-HUD)** in the top right corner, then select an income or expense type and enter an amount. For the spreadsheet financial assessment and the cash equivalents 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.


Financial Assessment Summary									
Total Rows: 6									
	Date	AMI	Program	Assessment Event	Total Income	Total Expense	Poverty	AMI Area	Assessment
	4/16/2015 12:00:00 AM	4,560.00%	Common Intake	At Entry	\$1,900.00	\$0.00	0.00%	Federal Unit...	116
	3/19/2015 12:00:00 AM	0.58%	CC Refugee Reception & Placement	At Entry	\$25.00	\$0.00	1.16%	Federal Unit...	115
	3/18/2015 12:00:00 AM	0.58%	CC Adoption	At Entry	\$25.00	\$0.00	1.16%	Federal Unit...	115
	3/18/2015 12:00:00 AM	1.04%	CC Emergency Services	At Entry	\$45.00	\$0.00	2.09%	Federal Unit...	115
	2/24/2015 11:54:00 AM	0.58%	Adult Education	During	\$25.00	\$0.00	1.16%	Federal Unit...	114
	1/25/2015 12:00:00 AM	3,600.00%	_CEAP / Utility Assistance	At Entry	\$1,500.00	\$0.00	3,947.36%	Federal Unit...	116


Click on the action gear  icon associated with the desired assessment. Select View Cash Equivalent from the pop up menu that appears.

Financial Assessment Summary									
Total Rows: 6									
<div>  Edit            View Cash Equivalent            Delete         </div>									
	4/16/2015 12:00:00 AM	4,560.00%	Common Intake	At Entry	\$1,900.00	\$0.00	0.00%	Federal Unit...	116
	3/19/2015 12:00:00 AM	0.58%	CC Refugee Reception & Placement	At Entry	\$25.00	\$0.00	1.16%	Federal Unit...	115
	3/18/2015 12:00:00 AM	0.58%	CC Adoption	At Entry	\$25.00	\$0.00	1.16%	Federal Unit...	115
	3/18/2015 12:00:00 AM	1.04%	CC Emergency Services	At Entry	\$45.00	\$0.00	2.09%	Federal Unit...	115
	2/24/2015 11:54:00 AM	0.58%	Adult Education	During	\$25.00	\$0.00	1.16%	Federal Unit...	114
	1/25/2015 12:00:00 AM	3,600.00%	_CEAP / Utility Assistance	At Entry	\$1,500.00	\$0.00	3,947.36%	Federal Unit...	116

The Cash Equivalent Summary form displays.

Cash Equivalent Summary					
Total Rows: 1					
Program	Assessment Begin Date	Assessment Event	Number Of Item	Amount	Assessment
 Common Intake	4/16/2015	At Entry	4	\$695.00	116

To view a list of cash and cash equivalents held by the client, click the action gear  and click Edit.

Cash Equivalent Summary						+ Add New	
Total Rows: 1						Search	
Program	Assessment Begin Date	Assessment Event	Number Of Item	Amount	Assessment I		
 Edit	4/16/2015	At Entry	4	\$695.00	1165		


The Cash Equiv. Assessment form displays.


Cash Equiv. Assessment			
Assessment *			4/16/2015 - Common Intake - At Entry
			Search
Category	Description	Amount	
<input checked="" type="checkbox"/> Cash Equivalents	Checking Account	\$50.00	
<input checked="" type="checkbox"/> Cash Equivalents	Savings Account	\$45.00	
<input checked="" type="checkbox"/> Cash Equivalents	Cash on Hand	\$400.00	
<input checked="" type="checkbox"/> Cash Equivalents	Safety Deposit Box	\$200.00	

## Budget Financial Summary


**Objective:** View and manage budget financial assessments.


Financials


Income and Expenses


Budget Summary

Balance Sheet


Balance Sheet Summary


Cash Equivalents



Click the icon for Budget Summary. The Budget Financial Summary form displays.

Budget Financial Summary					
Assessment Date	Program	Event	Budget Income	Budget Expenses	Budget Remaining
5/19/2015	12 Permanent Housing for Homeless Disabled	During	\$2,000.00	\$1,600.00	\$400.00
5/6/2015	TEST Program	During	\$0.00	\$436.00	\$-436.00

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

The Budget Financial Assessment form displays.

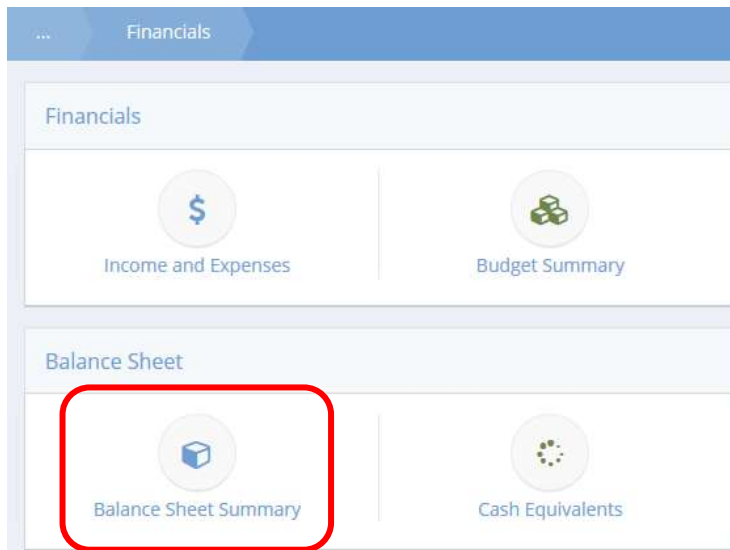
Budget Financial Assessment				
<div style="text-align: right;">+ Add Row</div>				
<div style="background-color: #f8d7da; padding: 5px;"> <p>Income or Expense Type is a required field.</p> <p>Amount is a required field.</p> </div>				
<div> <div>Assessment *</div> <div>6/19/2015 - Isample prog (HIV) - At Entry</div> </div>				
<div> <div>+ New Assessment</div> <div>Copy Current Assessment</div> <div>Copy Assessments</div> <div>Edit Date/Restriction</div> </div>				
Date	Program	Type		
6/19/2015	Isample prog (HIV)	At Entry		
6/17/2015	_CEAP / Utility Assistance	At Entry		
6/11/2015	Family VI SPDAT	At Entry		
4/8/2015	2 YAGA	During		
2/25/2015	09 Head Start	At Entry		
<div>Income from Any Source *</div> <div>Yes</div>				
<div>Total Rows: 1</div>				
Income or Expense Type *	Category	Interval	Amount *	Monthly Budget Amt
<div></div>		Monthly	<div></div>	
			\$0.00	
				Total: \$0.00

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.

The screenshot shows the 'Balance Sheet Summary' table. The table has a header row with columns: AssessmentID, Assessment Date, Program Name, Event, Enrollment Status, Assets, Liabilities, and Equity. There is one data row with the following values: 11528, 2/25/2015, '09 Head Start, At Entry, Assessments Pending, \$12.00, \$0.00, and \$12.00. The 'Add New' button in the top right corner is highlighted with a red rectangular box.

AssessmentID	Assessment Date	Program Name	Event	Enrollment Status	Assets	Liabilities	Equity
11528	2/25/2015	'09 Head Start	At Entry	Assessments Pending	\$12.00	\$0.00	\$12.00

Click the **+ Add New** button to add a new Financial Assessment.

The Financial Assessment form displays.

Financial Assessment

Assessment: 6/17/2015 - \_CEAP / Utility Assistance - At Entry

+ New Assessment Copy Current Assessment Copy Assessments Edit Date/Restriction

Date	Program	Type
6/17/2015	_CEAP / Utility Assistance	At Entry
6/16/2015	Isample prog (HIV)	At Entry
6/11/2015	Family VI SPDAT	At Entry
4/8/2015	2 YAGA	During
2/25/2015	09 Head Start	At Entry

Assets from Any Source: Yes

Total Rows: 0

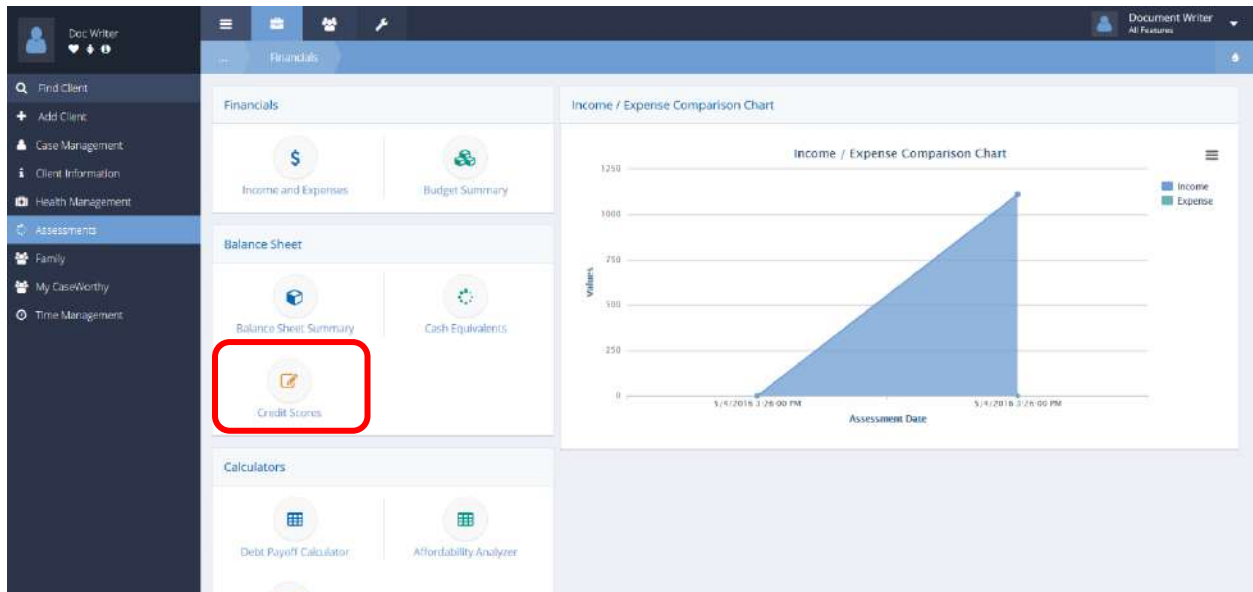
Income or Expense Type *	Category	Amount
		0.00
		Total: \$0.00

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.



Credit Score Summary							+ Add New
Total Rows: 1							
	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.

... Credit Score Summary

Total Rows: 1


	Assessment Date	Program Name	Credit
<div>  Edit              Credit Details         </div>	8/30/2015	Mercy Housing Program	

The Credit Score Details (Spreadsheet) form displays.


... Credit Score Details (Spreadsheet)

	Account Opening Date	Credit Institution	Last 4 AC #	Credit Limit	Status	Min. MOS Payment	Remaining
<input checked="" type="checkbox"/>		TEST		\$0.00	Delinquent	\$50.00	\$0.00

Save Cancel

Click the blue checkbox  icon to edit an entry. The row expands for editing.

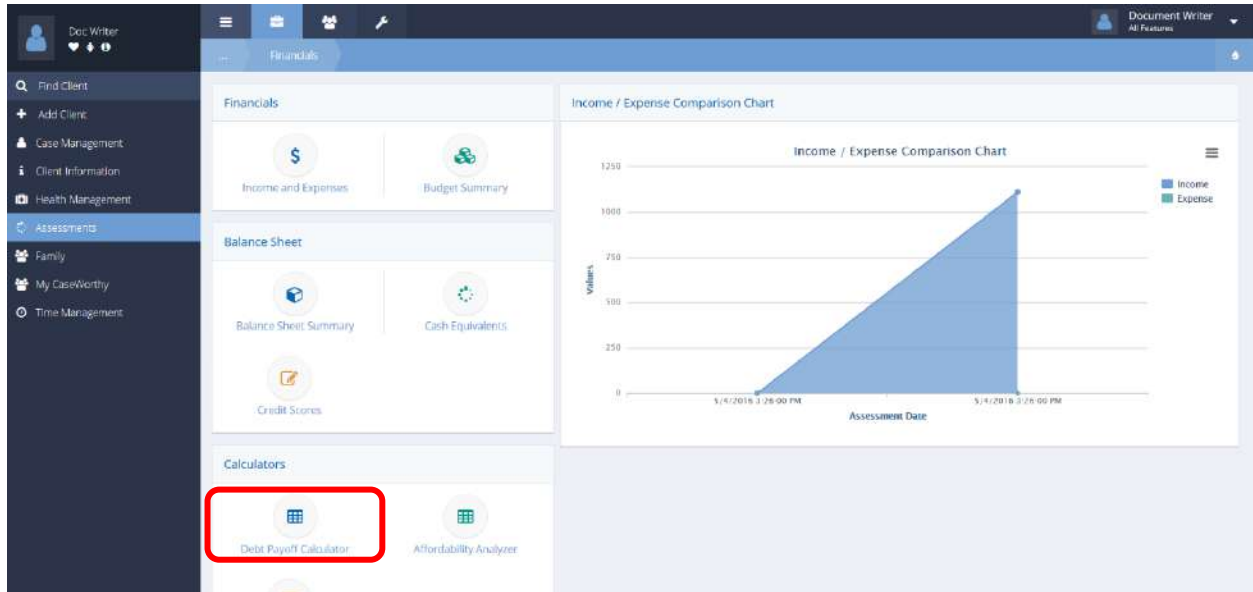
	Account Opening Date	Credit Institution	Last 4 AC #	Credit Limit	Status	Min. MOS Payment	Remaining
<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text" value="TEST"/>	<input type="text"/>	<input type="text" value="0.00"/>	<input type="text" value="Delinquent"/>	<input type="text" value="50.00"/>	<input type="text" value="0.00"/>

Make any desired changes. Click the  Save button to save and exit.

## Debt Payoff Calculator

**Objective:** Calculate client debt payoff plan.


**Navigation:** Case Management>Assessments>Financials



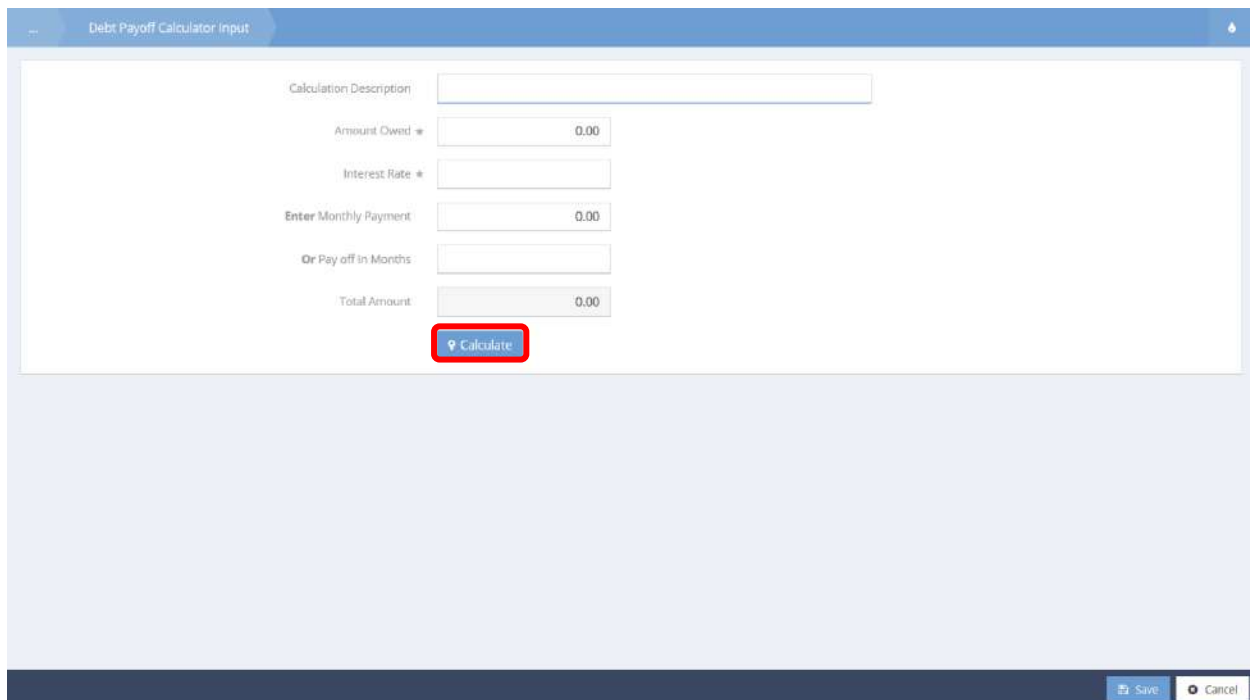
Select Debt Payoff Calculator from the Calculators portion of the Financials dashboard.

The Debt Payoff Calculator Summary form displays.

Debt Payoff Calculator Summary							+ Add New
	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.



The screenshot shows a web application window titled "Debt Payoff Calculator Input". The form contains the following fields and controls:

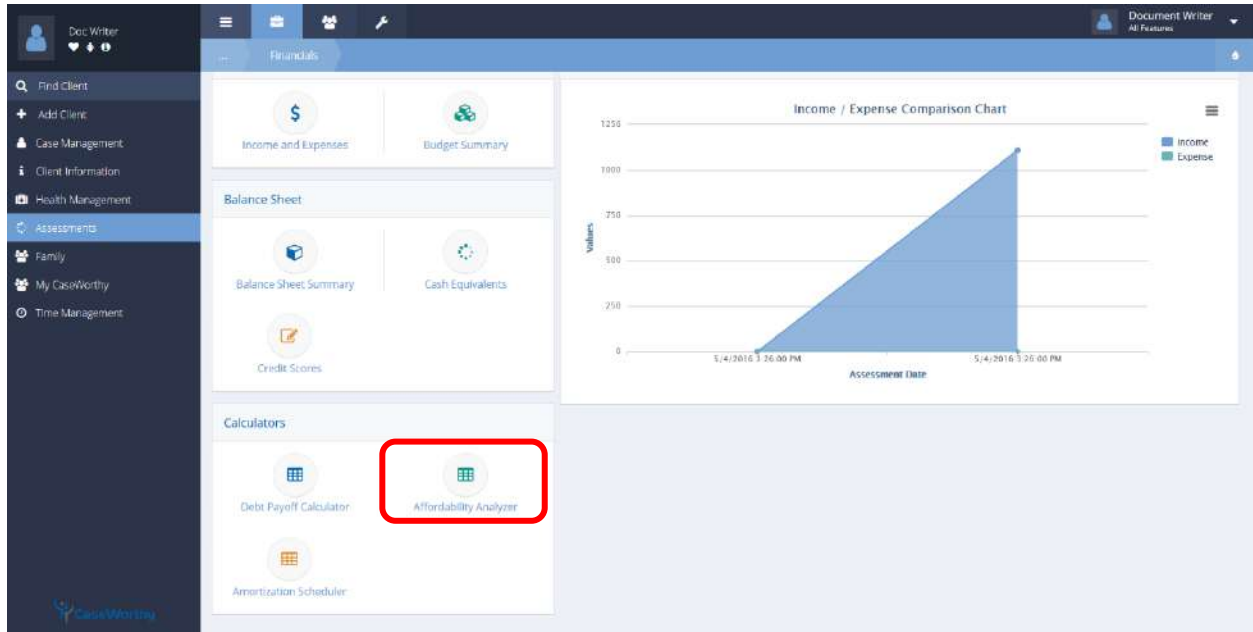
- Calculation Description:** A text input field.
- Amount Owed:** A numeric input field with a value of 0.00.
- Interest Rate:** A numeric input field.
- Enter Monthly Payment:** A numeric input field with a value of 0.00.
- Or Pay off in Months:** A numeric input field.
- Total Amount:** A numeric input field with a value of 0.00.
- Calculate:** A blue button with a calculator icon, highlighted with a red rectangle.
- Save:** A blue button with a floppy disk icon, located in the bottom right corner.
- Cancel:** A white button with a grey border, located in the bottom right corner.

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 **+ Add New** button.




The Affordability Calculator Input (Add New) form displays.

The screenshot shows the 'Affordability Calculator Input (Add New)' form. It is organized into four main sections, each with a dropdown arrow icon on the left:

- Rate and Description Information:** Contains fields for 'Calculation Description', 'Interest Rate', 'Length of Loan' (a dropdown menu), and 'Factor'.
- Income and Debt Calculation:** Contains fields for '(1) Monthly Gross Income (All Family Members)', '(2) Housing Debt Rate' (with a default value of 0.38), '(3) Debt Income Rate' (with a default value of 0.41), '(4) Total Monthly Debt Payments' (with a default value of 0.00), '(5) Subtract Line 4 from Line 3', and '(6) Whichever is Less (5) or (2)'.
- Escrow Information / Calculation:** Contains fields for '(7) Taxes and Insurance Rate' (with a default value of 0.20), '(8) Subtract (7) from (6)', 'Divide Line 8 by Factor', 'Multiplier' (with a default value of 1000), 'Estimated Taxes and Insurance', and 'Maximum Loan Amount'.
- Down Payment and Maximum Mortgage:** Contains fields for 'Down Payment' and 'Affordability - Maximum Home Purchase Price'.

At the bottom right of the form, there are 'Save' and 'Cancel' buttons. A 'Print' button is also visible in the top right corner of the form's header area.

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.

Affordability Analyzer Calculator Summary				
	Calculation Date	Calculation Description	Length of Loan	Monthly Gross Income
	 Edit	15 Year Loan Test Again	15 Year Mortgage	\$3,000.00
	12/16/2015	Test 15 Year Loan	15 Year Mortgage	\$3,000.00

The Affordability Analyzer Calculator Input (Add New) form displays.

Affordability Analyzer Calculator Input (Add New)
Print

Rate and Description Information

Calculation Description
15 Year Loan Test Again

Length of Loan \*
15 Year Mortgage

Interest Rate
4.0000

Factor
4.7700

Income and Debt Calculation

(1) Monthly Gross Income (All \* Family Members)
3000.00

(2) Housing Debt Rate
0.38

(3) Debt Income Rate
0.41

(4) Total Monthly Debt \* Payments
100.00

(5) Subtract Line 4 from Line 3
\$1,040.00

(6) Whichever is Less (5) or (2)
1,040.00

Housing Ratio
\$1,140.00

Debt Ratio
\$1,230.00



Escrow Information / Calculation

(7) Taxes and Insurance Rate
0.2000

(8) Subtract (7) from (6)

Estimated Taxes and Insurance

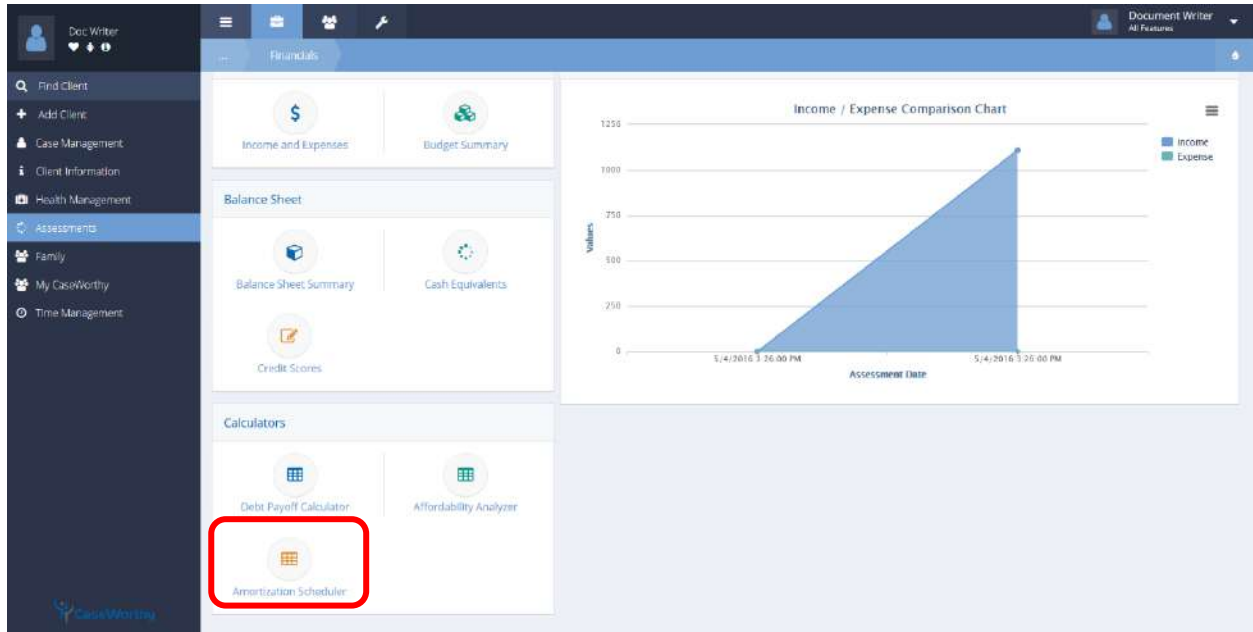
Save
Cancel

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  button to save. Click the  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.

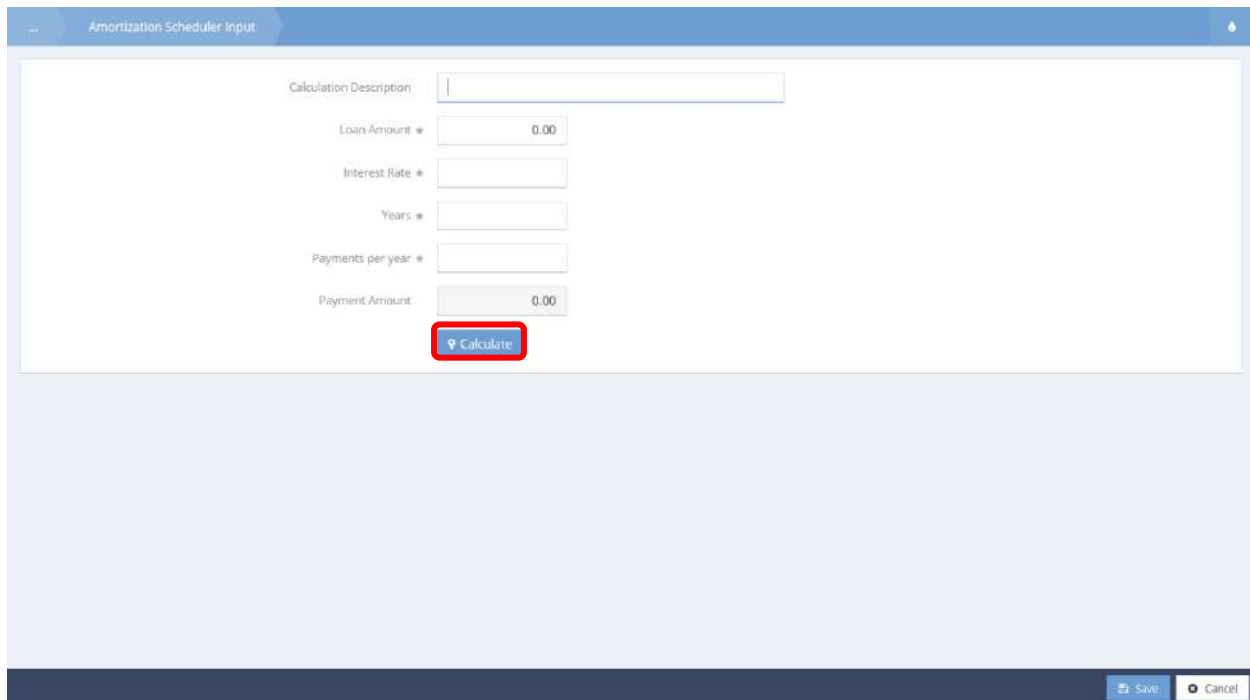
The Amortization Scheduler Input form displays existing amortization schedules.

Amortization Scheduler Input							
	Calculation Description	Calculation Date	Loan Amount	Interest Rate	Years	Pmts per year	Payment Amount
⚙	Testing	5/16/2016	\$5,540.00	0.10%	8	2	\$347.72

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 **+ Add New** button.

The Amortization Scheduler Input form displays.



The screenshot shows the 'Amortization Scheduler Input' form. It has a blue header bar with the title 'Amortization Scheduler Input' and a small icon on the right. Below the header, there is a large white input area. Inside this area, there are several input fields: 'Calculation Description' (a text box), 'Loan Amount' (a numeric field with a dropdown arrow, showing '0.00'), 'Interest Rate' (a numeric field with a dropdown arrow), 'Years' (a numeric field with a dropdown arrow), 'Payments per year' (a numeric field with a dropdown arrow), and 'Payment Amount' (a numeric field with a dropdown arrow, showing '0.00'). Below these fields is a red button with a white icon and the text 'Calculate'. At the bottom right of the form, there are two buttons: 'Save' and 'Cancel'.

Enter information into required fields: Loan Amount, Interest Rate, Years, and Payments per year. Click the **Calculate** button.

The Payment Amount field auto populates according to information entered.

Amortization Scheduler Input

Calculation Description: Test

Loan Amount: 58000.00

Interest Rate: .21

Years: 10

Payments per year: 10

Payment Amount: 586.17

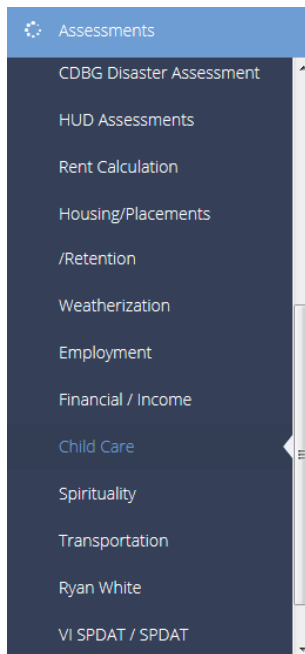
Calculate Schedule

Save Cancel

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.

Print			
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.

A screenshot of the 'Child Care Summary' form. At the top right is a red-bordered '+ Add New' button. Below the header, it says 'Total Rows: 1'. A table with 5 columns is shown: Assessment Date, Program, Assessment Event, Hrs Per Week, and Case Note. The first row contains the values: 2/24/2015 11:54:00 AM, Adult Education, During, 40.00, and an empty Case Note field.

Assessment Date	Program	Assessment Event	Hrs Per Week	Case Note
2/24/2015 11:54:00 AM	Adult Education	During	40.00	

A screenshot of the 'Child Care Input' form. At the top, it says 'Assessment # No assessment selected.' Below this are two red-bordered input fields: 'Set or Varied work schedule' (a dropdown menu) and 'Hours Worked Per Week' (a text field with the value 0.00). Below these is a 'Parent work shift' dropdown menu. At the bottom left is a 'Note' label and a 'Case Note' button.

Assessment # No assessment selected.

Set or Varied work schedule: [dropdown]  
Hours Worked Per Week: 0.00

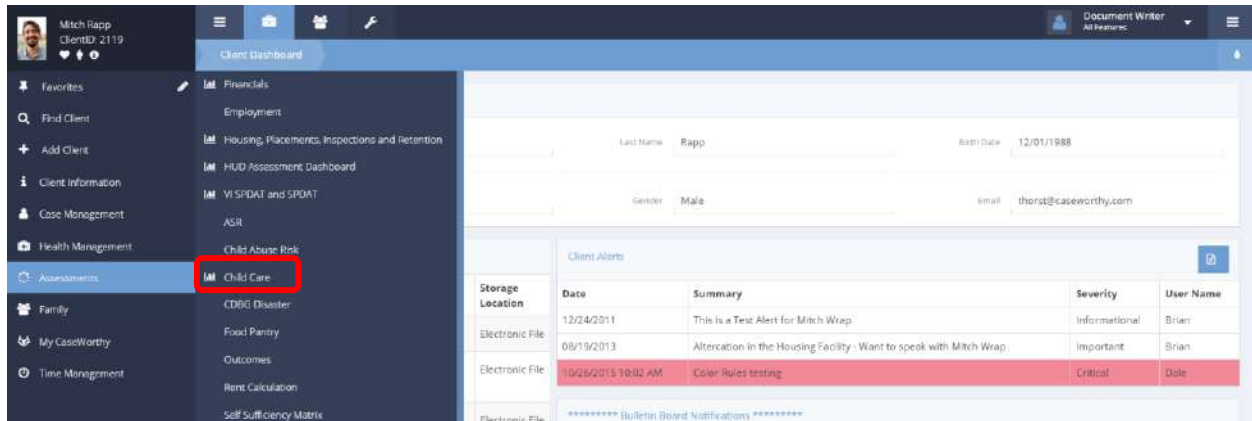
Parent work shift: [dropdown]

Note Case Note

## Child Feeding Instructions

**Objective:** Allow parents to dictate various feeding instructions for their children.

**Navigation:** Case Management>Assessments>Child Care>Feeding Instructions>...Add New

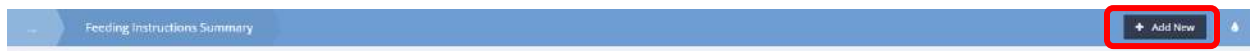


Under the Client Dashboard click Assessments to view a pop-up menu. Select the Child Care dashboard from the menu. The Child Care dashboard appears.



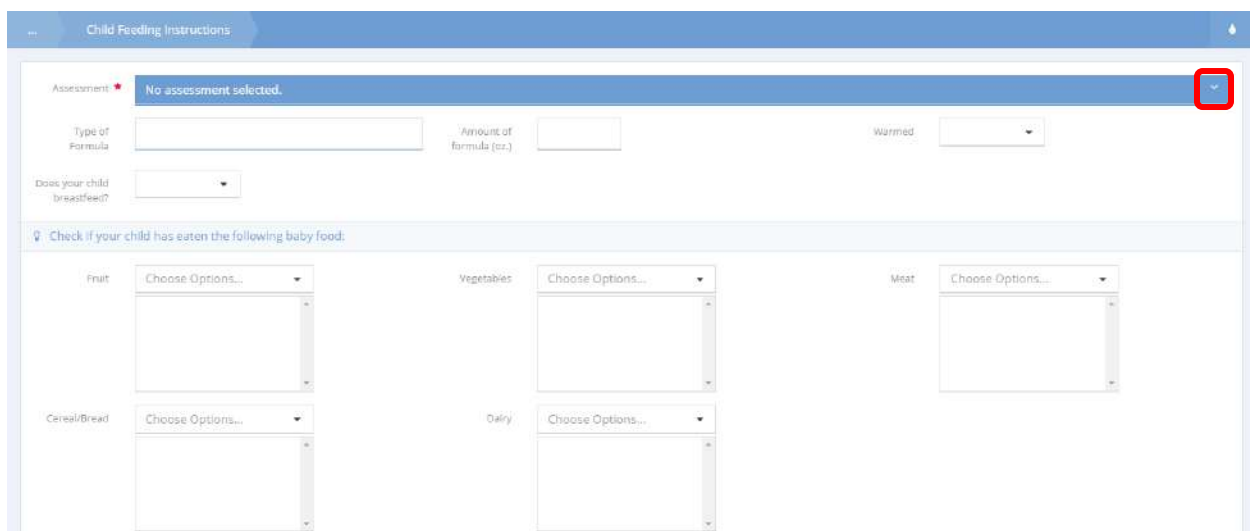
Click the Feeding Instructions icon.

The Feeding Instructions Summary page appears.



Assessment Date	Program	Assessment Event	System ID
3/23/2017	Head Start	During	21789
7/26/2017	VI SPDAT Eligibility Test	At Entry	23208
7/31/2017	1 FinancialHMI5	During	23219
9/18/2017	1 FinancialHMI5	During	23443

Click the **+ Add New** button to view the Child Feeding Instructions form. The Child Feeding Instructions form displays.



Child Feeding Instructions

Assessment: No assessment selected.

Type of Formula:  Amount of formula (oz.):  Warmed:

Does your child breastfeed?

Check if your child has eaten the following baby food:

Frut	Choose Options...	Vegetables	Choose Options...	Meat	Choose Options...
Cereal/Bread	Choose Options...	Dairy	Choose Options...		

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.

When does your child eat?

What kind of juice?

What do you use for diaper rash?

Serving instructions

Do you give us permission to use it as well?

*\*Please note: Parent is responsible for bringing ointment, powder, etc.\**

How does your child sleep (back, tummy, etc.)?

Does your child sleep in a crib by his/her self?

How often are his/her naps?

How long her his/her naps (minutes)?

What is the best way to get your child to sleep (rocking, patting, etc.)?

*\*Please note: Your child will be placed on his/her back to sleep unless we receive a note from your physician stating that it would be best for him/her to sleep in a different position. Blankets, stuffed animals, or other fluffy items are not allowed in the cribs\**

Does your baby use a pacifier?

Special instructions?

Any other helpful information?

How do we calm your baby if she/he is upset?

Schedule Follow-up ☒

Parent's signature

[Add Signature](#)

[Save](#) [Cancel](#)

To schedule a follow-up, click the ☒ icon. The Schedule Case Manager Followup form appears. Some information auto populates. Enter any remaining information.

Schedule Follow-up

Schedule Case Manager Followup

Client:

Follow Up Type:

Follow Up Days:

Target Follow Up Date:

Follow Up Status:

Assigned Team:

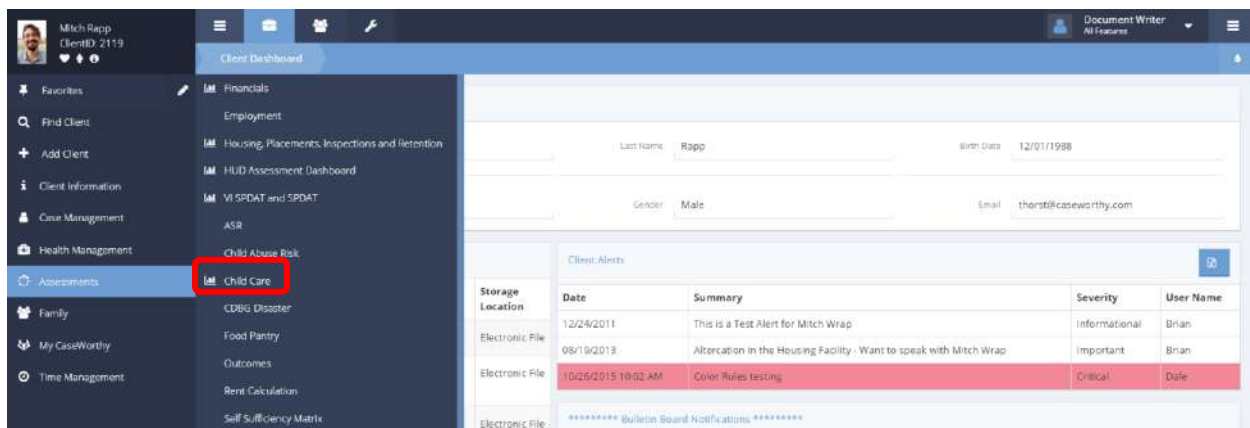
Team Member:

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.

Infant Feeding Preference Summary				<a href="#">+ Add New</a>
Assessment Date	Program	Assessment Event	System ID	
7/31/2017	I 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.

Infant Feeding Preferences

Assessment
No assessment selected.

Preferences Date:
09/22/2017

Age group:

The center will feed your infant breastmilk provided by you and/or we will provide iron fortified infant formula.

The infant formula provided by this center is:

This center participates in the Child and Adult Care Food Program (CACFP) and receives USDA reimbursement for serving nutritious meals to infants according to program requirements. Participation in this program requires centers to follow specific meal patterns according to the age of the infant. Centers participating in the CACFP are required to offer infant formula to infants who are enrolled for child care. Parents (or guardians) may decline the infant formula offered by the provider, and supply the infant's formula.

Formula/Breastmilk Preferences:
Choose Options...

Parent's signature

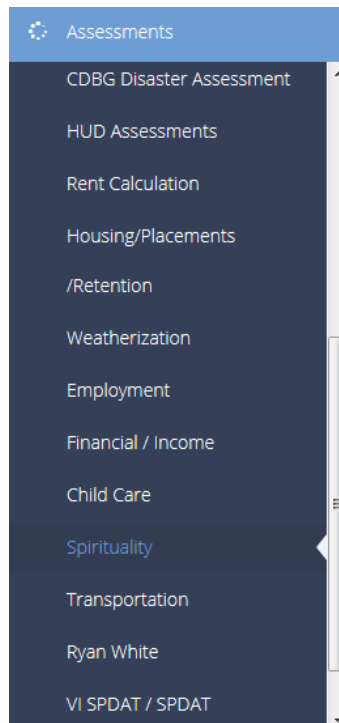
Add Signature

1. This form must be kept on file for each infant enrolled for child care. 2. This form must be kept current and accurate for each infant enrolled for child care until the infant reaches one year of age. 3. If the parent (or guardian) declines the formula and the center provides meal and/or snack components, the meal may be claimed for reimbursement. 4. If the parent (or guardian) declines infant meals/snack, meals and snacks may NOT be claimed for reimbursement.

Save
Cancel

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.

The screenshot shows two parts of the Spirituality form. The top part is the 'Spirituality Summary' table, and the bottom part is the 'Enter Spirituality Information' form.

**Spirituality Summary Table:**

Assessment Date	Program	Assessment Event	Attend Services	Where Attend	Case Note
2/24/2015	Adult Education	During	False		

**Enter Spirituality Information Form:**

Assessment: No assessment selected.

Wants spirituality services: ☒ (highlighted with a red box)

Location of services:  (highlighted with a red box)

Wants spirituality assistance:  (highlighted with a red box)

Mentor First Name:

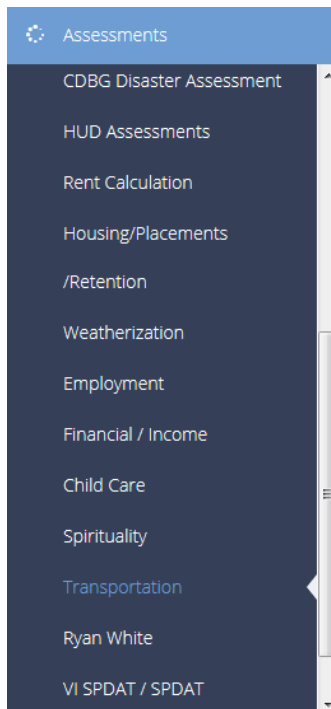
Last Name:

Enter the Religious Preference. If Christian Protestant is selected, please select the denomination.

Religion Preference:

Case Note:

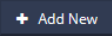
## Transportation



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.

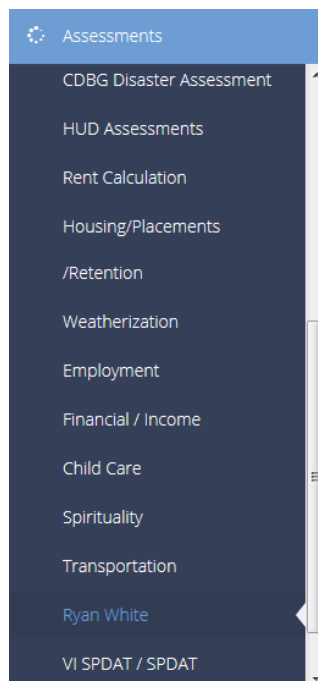
A screenshot of the 'Transportation Summary' form. The form has a blue header bar with the title 'Transportation Summary' and a red-outlined '+ Add New' button. Below the header is a table with four columns: 'Transportation Type', 'Licensed', 'License Class', and 'No License Explanation'. The first row of the table shows 'Own Car' under 'Transportation Type', 'False' under 'Licensed', and empty fields for 'License Class' and 'No License Explanation'.

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.

The screenshot shows the 'Ryan White Assessment Input' form. At the top, there is a blue header bar with a '+ Add New' button. Below the header, there is a table with the following data:

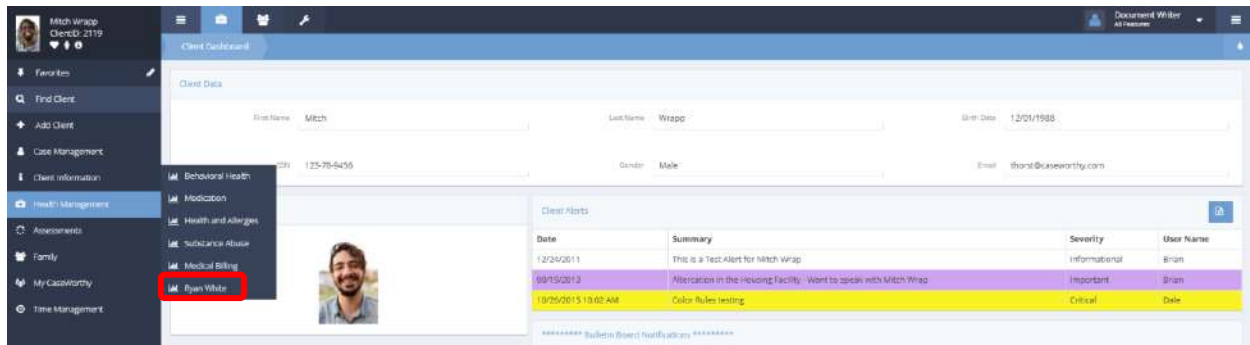
Assessment Date	Program	HIV / AIDS Status	CD4 Count Date	CD4 Counts
2/24/2015 11:54:09 AM	Adult Education	HIV negative		0

Below the table, there is a section titled 'Ryan White Assessment Input'. It contains a dropdown menu for 'Assessment' with the text 'No assessment selected.' Below this, there is a date field for 'Assessment Date' with the value '03/06/2015'. A red box highlights the 'HIV / AIDS Status' dropdown menu, which is currently set to 'HIV negative'. Below this, there is a section for 'HIV Risk Factors' with a 'Choose Options...' button. At the bottom, there is a section titled 'Viral and CD4 Information' with fields for 'Viral Status', 'Viral Load Count' (0), and 'CD4 Counts' (0).

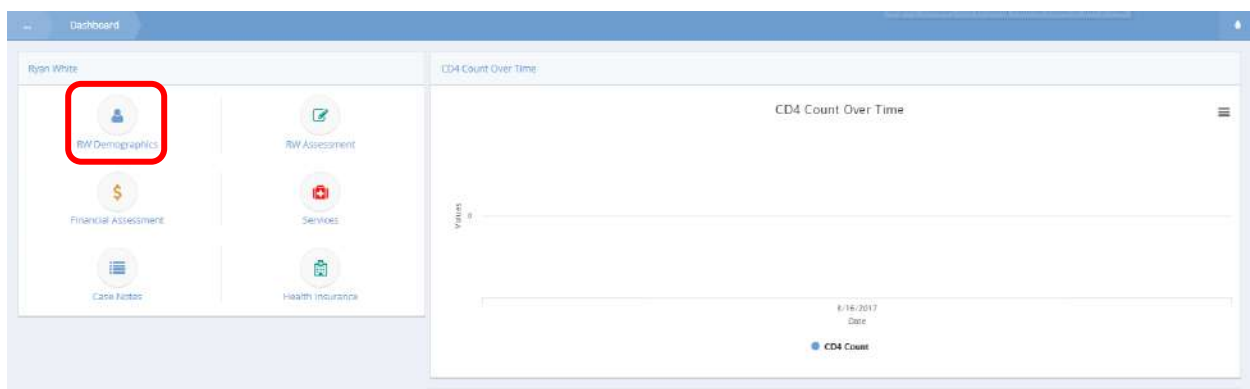
## Add Client Demographics – RW

**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 demographics 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.

HIV							
Total Rows: 2							
	Assessment Date	Program	HIV/AIDS Status	CD4 Count Date	CD4 Count	Viral Load Count Date	Viral Load Count
	2/8/2017	Grant Management United Way	HIV positive, not AIDS	3/16/2017		3/1/2017	199
		Lead Start	HIV positive, AIDS status unknown	3/30/2017		3/2/2017	

The View Client Files form appears displaying any files that have been created.

View Client Files

Filters

Context ID

21789

Download Selected

Total Rows: 2

	File Classification	Context ID	<input type="checkbox"/>	Created Date	File Label	Type	Created By	Files ID
	CD4 Count	21789	<input checked="" type="checkbox"/>	3/23/2017	CaseWorthyExport_636256303078841520.xlsx	application/vnd.openxmlformats-officedocument.spreadsheetml.sheet	Josie	3841
	Viral Load	21789	<input checked="" type="checkbox"/>	3/23/2017	CaseWorthy Image.png	image/png	Josie	3840

Click on the ☒ icon to select a file for downloading. Click the Download Selected button to download all selected files.

Total Rows: 2							
	File Classification	Context ID	<input type="checkbox"/>	Created Date	File Label	Type	Created By
	CD4 Count	21789	<input checked="" type="checkbox"/>	3/23/2017	CaseWorthyExport_636256303078841520.xlsx	application/vnd.openxmlformats-officedocument.spreadsheetml.sheet	Josie
	Viral Load	21789	<input checked="" type="checkbox"/>	3/23/2017	CaseWorthy Image.png	image/png	Josie

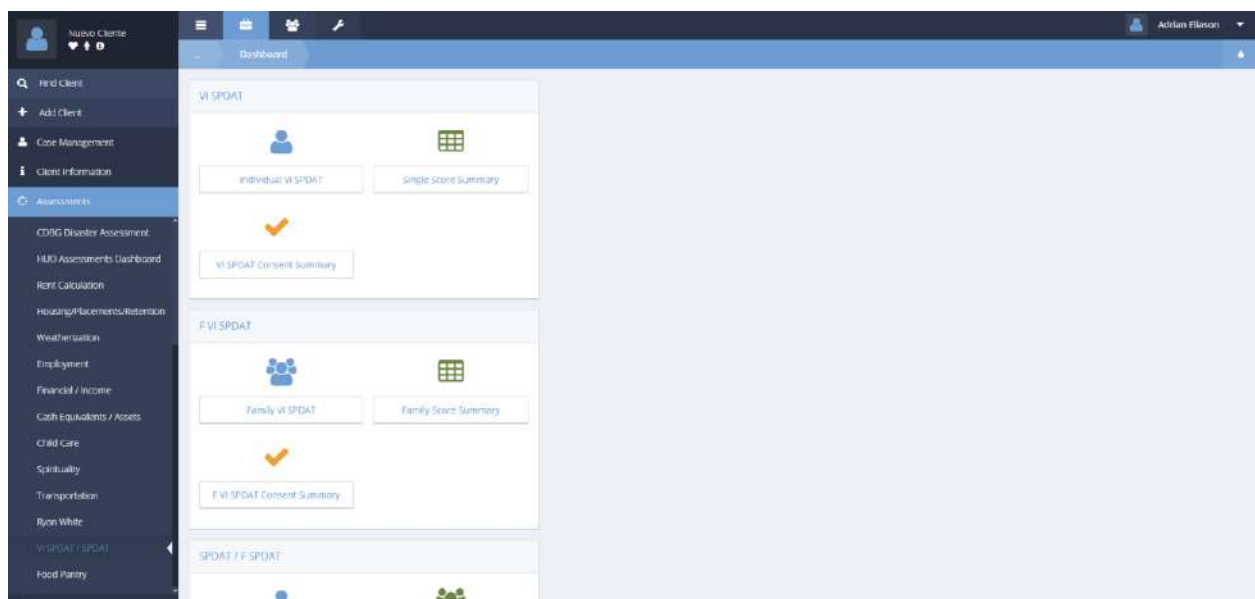
Click on the action gear icon to view a pop-up menu with additional options. Select View Image, to view the image. Select Generate Embed Doc Link to create a link to the file.

## 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)

Summary of SPDAT Data (2024)

Family SPDAT V. 2.01 Summary																					<a href="#">Add New</a>
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
29	Family	2	1	0	4	2	3	2	0	4	2	2	1	3	9	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.

Single Adult SPDAT V. 4.01 Summary															+ Add New	
Total Score	Mental Health	Physical Wellness	Medication	Substance Use	Abuse	Harm Risk	Risky Situations	Emergency Services	Self Care	Legal	Tenancy	Money	Relationships	Daily Activity	Housing and Homelessness	
31	2	2	3	1	1	2	2	3	2	2	3	1	2	2	3	

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

The Single Adults SPDAT V. 4.01 displays.

Single Adults SPDAT V. 4.01

A. Mental Health and Wellness

Assessment: No assessments selected

Assessment Level: [Dropdown]

Comments: [Text Area]

Next

B. Physical Health and Wellness

C. Medication

D. Substance Use

E. Experience of Abuse and/or Trauma

F. Risk of Harm to Self or Others

G. Involvement in High Risk and/or Explosive Situations

H. Interaction with Emergency Services

I. Legal

J. Managing Tenancy

K. Personal Administration and Money Management

L. Social Relationships and Networks

M. Self Care and Daily Living Skills

Cancel

The Youth SPDAT V. 1.0 Summary form displays.

Total Score	Mental Health	Physical Wellness	Medication	Substance Use	Abuse	Harm Risk	Risky Situations	Emergency Services	Self Care	Legal	Tenancy	Money	Relationships	Daily Activity	Housing and Homelessness
31	2	2	3	1	1	2	2	3	2	2	3	1	2	2	3

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

The Youth SPDAT V. 1.0 form displays.

The screenshot displays the Youth SPDAT V. 1.0 form interface. The title bar at the top reads "Youth SPDAT V. 1.0". The main content area is divided into two sections. The top section, titled "A. Mental Health and Wellness", contains a dropdown menu for "Assessment" with the text "No assessment selected", a dropdown menu for "Assessment Level", and a text area for "A Comments". Below these fields is a "Next" button. The bottom section is a list of assessment categories, each with a dropdown arrow on the right: "B. Physical Health and Wellness", "C. Medication", "D. Substance Use", "E. Experience of Abuse and/or Trauma", "F. Risk of Harm to Self or Others", "G. Involvement in High Risk and/or Explosive Situations", "H. Interaction with Emergency Services", "I. Legal", "J. Managing Tenancy", "K. Personal Administration and Money Management", "L. Social Relationships and Networks", and "M. Self Care and Daily Living Skills". A "Cancel" button is located at the bottom right of the form.

## Administration

**Navigation:** Administration>Reporting>Compliance Reports>SPDAT

The SPDAT Analytics form displays.

The screenshot shows the 'SPDAT Analytics' form. At the top, there is a header bar with the title 'SPDAT Analytics'. Below the header, there is a search area with a dropdown menu labeled 'Family, Single Adult, or Youth' and a date range selector showing '03/03/2017 through 03/03/2017'. A 'Search' button is located on the right side of the search area. The main body of the form is currently empty.

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.

The screenshot shows the 'SPDAT Analytics' form with the search results displayed. The 'Family, Single Adult, or Youth' dropdown is set to 'Individual' and the date range is '03/07/2016 through 03/03/2017'. A 'Last Updated: 3/3/2017 5:02:33 PM' message is shown. Below the search area, there is a table with the following data:

Date Range-Year	Total Sum of Client ID
2016	46,272.00
Grand Total	46,272.00

Below the table, there is a 'Pivot Table' section with a 'PivotTable' button. A 'PivotTable' dialog box is open, showing the 'PivotTable' options. The 'PivotTable' dialog box has a 'PivotTable' tab selected. The 'PivotTable' options are as follows:

- Row Labels: Date Range-Year
- Column Labels: Sum of Client ID
- Values: Sum of Client ID

The 'PivotTable' dialog box also has a 'PivotTable' section with a 'PivotTable' button. The 'PivotTable' options are as follows:

- Row Labels: Date Range-Year
- Column Labels: Sum of Client ID
- Values: Sum of Client ID

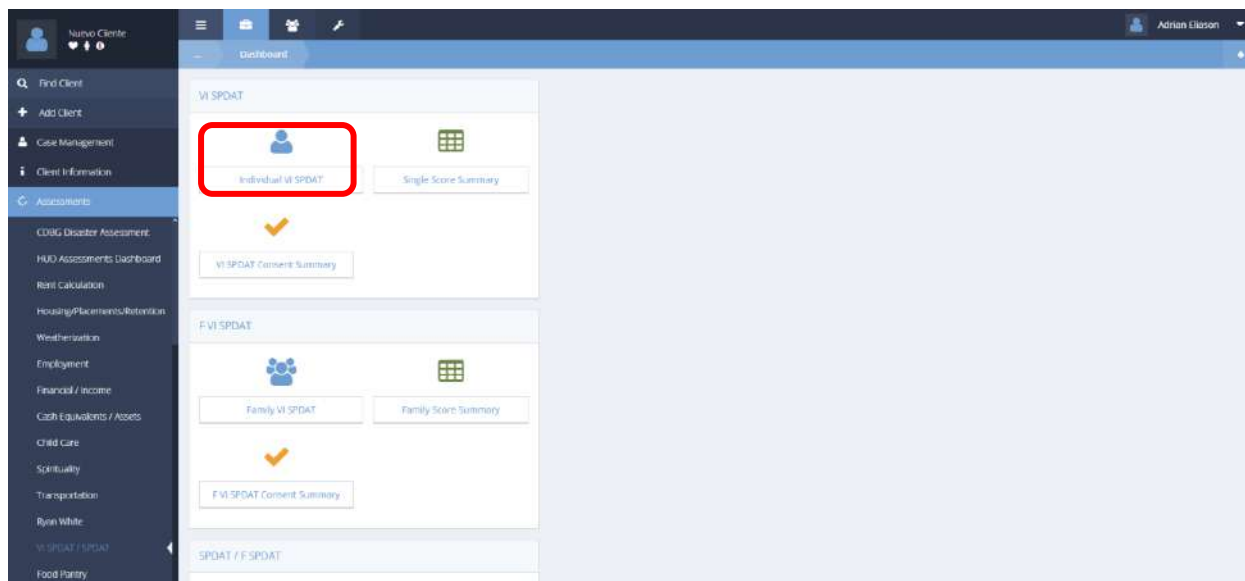
The 'PivotTable' dialog box has a 'PivotTable' button and a 'Done' button.

A pivot form displays with the desired information. Use the pivot functionality to view the results as desired.

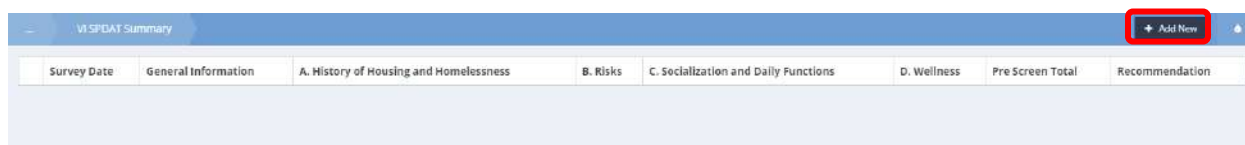


### Individual VI SPDAT

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.

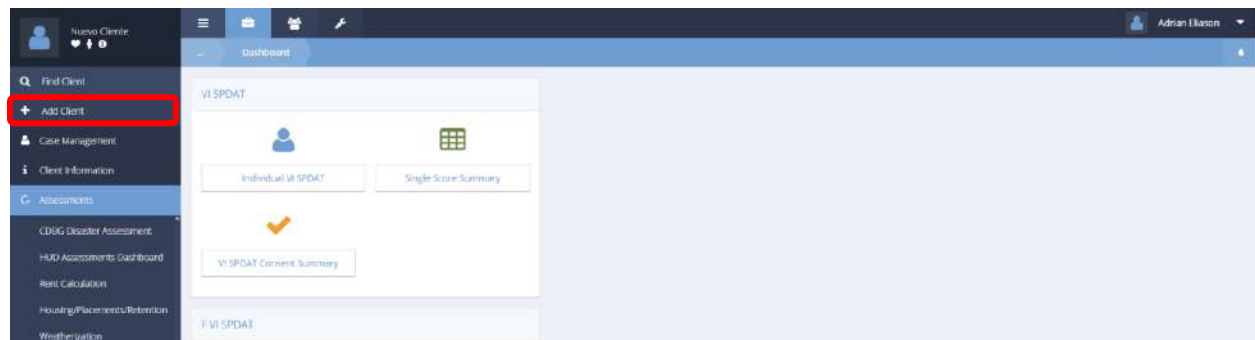


If selecting the Individual VI SPDAT icon, the VI SPDAT Summary form displays.



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.

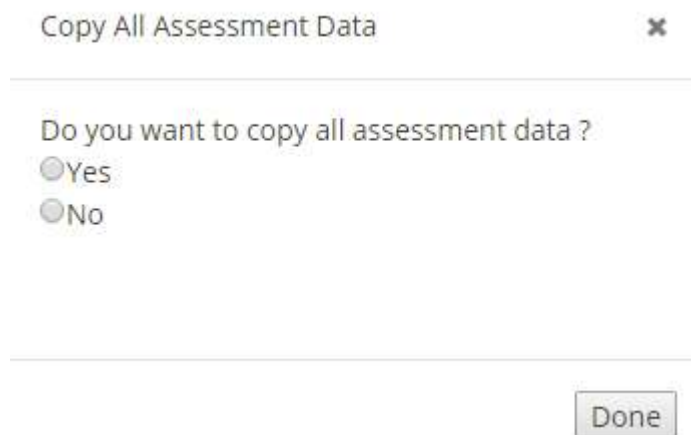
The screenshot shows a web form titled "Client Contact Add Spreadsheet". The form is divided into two main sections. The top section contains fields for "Last Name", "First Name", "Begin Date" (with a calendar icon and the value "12/11/2014"), "End Date" (with a calendar icon and the value "Present"), "Relationship" (a dropdown menu), and "Category" (a dropdown menu with the text "Choose Options..."). The bottom section, titled "Contact Information", contains fields for "Phone 1 Type", "Phone 2 Type", "Email", "Confirm Email", and a checkbox for "Is Emergency Contact". At the bottom right of the form, there are "Save" and "Cancel" buttons.

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 workflow.

The screenshot shows a web form titled "VI SPDAT Enrollment Add/Edit". The form contains fields for "Family Name" (with the value "Diamond,Niel-1959-04-21"), "Program Entry Date" (with a calendar icon and the value "12/11/2014"), "Program Exit Date" (with a calendar icon and the value "12/31/9999"), "Program" (a dropdown menu), and "Provider" (a dropdown menu with the value "CaseWorthy"). Below these fields is a section titled "Restriction Information" which contains a "Restriction" dropdown menu with the value "Shared". At the bottom right of the form, there is a "Save" button.

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  button.



A dialog box titled "Copy All Assessment Data" with a close button (X) in the top right corner. The main text asks "Do you want to copy all assessment data ?". Below this text are two radio button options: "Yes" and "No". At the bottom center of the dialog is a "Done" button.



A screenshot of the "General Information/Consent" form in the CaseWorthy application. The form is titled "Diamond, Niel - VI SPDAT Survey Information - Part 1". It contains several fields: "Assessment" (a dropdown menu showing "12/11/2014 - VI SPDAT Program - At Entry"), "Family Or Individual" (a dropdown menu showing "Individual"), "Interviewer's Name" (a text input field), "Agency" (a dropdown menu), "Survey Date & Time" (a date and time picker showing "12/11/2014" and "12:00 a"), "Location" (a text input field), and "Has Consented to Participate" (a dropdown menu). A "Next" button is located at the bottom right of the form.

Enter the Interviewer name, agency location...edit the date and time if desired...select the client response for consent. Click on the  button. The General Information/Consent step collapses and scrolls to the top of the form.

The Housing section of the form expands.

Diamond, Niel - VI SPDAT Survey Information - Part 1

General Information/Consent

A. Housing

1. What is the total length of time you have lived on the streets or in shelters (in months)?  Answered ▼

2. In the past three years, how many times have you been housed and then homeless again?  Answered ▼

◀ Previous Next ▶

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.

Diamond, Niel - VI SPDAT Survey Information - Part 1

A. Housing

B. Risks (SCRIPT: "I am going to ask you some questions about your interactions with health and emergency services. If you need any help figuring out when six months ago was, just let me know.")

3. In the past six months, how many times have you been to the emergency department/room?  Answered ▼

4. In the past six months, how many times have you had an interaction with the police?  Answered ▼

5. In the past six months, how many times have you been taken to the hospital in an ambulance?  Answered ▼

6. In the past six months, how many times have you used a crisis service, including distress centers or suicide prevention hotlines?  Answered ▼

7. In the past six months, how many times have you been hospitalized as an in-patient, including hospitalizations in a mental health hospital?  Answered ▼

8. Have you been attacked or beaten up since becoming homeless? \*  ▼

9. Threatened to or tried to harm yourself or anyone else in the last year? \*  ▼

10. Do you have any legal stuff going on right now that may result in you being locked up or having to pay fines? \*  ▼

11. Does anybody force or trick you to do things that you do not want to do? \*  ▼

12. Ever do things that may be considered to be risky like exchange sex for money, run drugs for someone, have unprotected sex with someone you don't really know, share a needle, or anything like that? \*  ▼

13. I am going to read types of places people sleep. Please tell me which one that you sleep at most often.  ▼

◀ Previous Next ▶

Ask the client the questions, enter their responses and click the [Next ▶](#) button to continue. The socialization related questions appear.

The screenshot shows the 'Diamond, Niel - VI SPDAT Survey Information - Part 1' interface. The 'C. Socialization' section is active, displaying seven questions with corresponding drop-down menus for responses. The questions are:

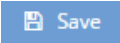
- 14. Is there anybody that thinks you owe them money? \*
- 15. Do you have any money coming in on a regular basis, like a job or \* government benefit or even working under the table, binning or bottle collecting, sex work, odd jobs, day labor, or anything like that? \*
- 16. Do you have enough money to meet all of your expenses on a monthly \* basis? \*
- 17. Do you have planned activities each day other than just surviving that \* bring you happiness and fulfillment? \*
- 18. Do you have any friends, family or other people in your life out of \* convenience or necessity, but you do not like their company? \*
- 19. Do any friends, family or other people in your life ever take your money, \* borrow cigarettes, use your drugs, drink your alcohol, or get you to do things really don't want to do? \*
- 20. Surveyor: do you detect signs of poor hygiene or daily living skills? \*

At the bottom of the section, there are 'Previous' and 'Next ▶' buttons.

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.

The screenshot shows the 'Diamond, Niel - VI SPDAT Survey Information - Part 1' interface. The 'D. Wellness' section is active, displaying question 21: '21. Where do you usually go for healthcare \* or when you're not feeling well? \*'. To the right of the question is a 'Choose Options...' drop-down menu. At the bottom of the section, there are 'Previous' and 'Save' buttons.



Ask the client the question, enter the response and click the  button to continue. The next step in the assessment appears.


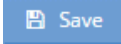
Diamond, Niel - VI SPDAT Survey: Wellness

Assessment 12/11/2014 - VI SPDAT Program - At Entry

Do you or does any family member have now, ever had, or had a healthcare provider ever tell you that you have any of the following medical conditions:

Medical Conditions *	Answer *
<input checked="" type="checkbox"/> Kidney disease/ Stage Renal Disease or Dialysis	
<input checked="" type="checkbox"/> History of frostbite, Hypothermia, or Immersion Foot	
<input checked="" type="checkbox"/> Liver Disease, Cirrhosis, or End-Stage Liver Disease	
<input checked="" type="checkbox"/> HIV/AIDS	
<input checked="" type="checkbox"/> History of Heat Stroke/Heat Exhaustion	
<input checked="" type="checkbox"/> Heart disease, Arrhythmia, or Irregular Heartbeat	
<input checked="" type="checkbox"/> Emphysema	
<input checked="" type="checkbox"/> Diabetes	
<input checked="" type="checkbox"/> Asthma	
<input checked="" type="checkbox"/> Cancer	
<input checked="" type="checkbox"/> Hepatitis C	
<input checked="" type="checkbox"/> Tuberculosis	

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.

Diamond, Niel - VI SPDAT Survey Information Part 3

D. Wellness (Continued)

Assessment 12/11/2014 - VI SPDAT Program - AI Entry

OBSERVATION ONLY - DO NOT ASK \*

34. Surveyor, do you observe signs or symptoms of a serious health condition?

35. Have you ever had problematic drug or alcohol use, abused drugs or alcohol, or told you do?

36. Have you consumed alcohol and/or drugs almost every day or every day for the past month?

37. Have you ever used injection drugs or shots in the last six months?

38. Have you ever been treated for drug or alcohol problems and returned to drinking or using drugs?

39. Have you used non beverage alcohol like cough syrup, mouthwash, rubbing alcohol, cooking wine, or anything like that in the past six months?

40. Have you blacked out because of your alcohol or drug use in the past month?

OBSERVATION ONLY - DO NOT ASK \*

41. Surveyor, do you observe signs or symptoms of problematic alcohol or drug abuse?

42. Ever been taken to a hospital against your will for a mental health reason?

43. Gone the emergency room because you weren't feeling 100% well emotionally or because of your nerves?

44. Spoken with a psychiatrist, psychologist or other mental health professional in the last six months because of your mental health - whether that was voluntary or because someone insisted that you do so?

45. Had a serious brain injury or head trauma?

46. Ever been told you have a learning disability or developmental disability?

47. Do you have any problems concentrating and/or remembering things?

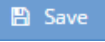
OBSERVATION ONLY - DO NOT ASK \*

48. Surveyor, do you detect signs or symptoms of severe, persistent mental illness or severely compromised cognitive functioning?


49. Have you had any medicines prescribed to you by a doctor that you do not take, sell, had stolen, misplaced, or where the prescriptions were never filled?

50. Yes or No - Have you experienced any emotional, physical, psychological, sexual or other type of abuse or trauma in your life which you have not sought help for, and/or which has caused your homelessness?

Save

Ask the client the questions, enter the responses and click the  Save 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.

The screenshot shows the 'Add New' form interface. At the top, there's a blue header bar with the text 'Add New'. Below this, there's a white area with three buttons: 'Start Camera', 'Capture Image', and 'Upload Image'. At the bottom of this white area, there's a 'Client Web Cam Photo' label and a 'Browse' button. Below the white area, there's a large light blue area. At the very bottom, there's a dark blue bar with 'Save' and 'Done' buttons.

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.

The screenshot shows the 'Workflow is now complete' screen. The table below lists the steps in the workflow:

Status	Step Name	Completed By	Completed Date
✓	Add New VI SPDAT Client	Eliaon, Adrian	12/11/2014
✓	Client Contact Add Spreadsheet	Eliaon, Adrian	12/11/2014
✓	VI SPDAT Enrollment Add/Edit	Eliaon, Adrian	12/11/2014
✓	Assessment	Eliaon, Adrian	12/11/2014
✓	Diamond, Niel		
✓	VI SPDAT Survey: Information - Part 1	Eliaon, Adrian	12/11/2014
✓	VI SPDAT Survey: Wellness	Eliaon, Adrian	12/11/2014
✓	VI SPDAT Survey: Information Part 3	Eliaon, Adrian	12/11/2014
✓	VI SPDAT Questionnaire	Eliaon, Adrian	12/11/2014
✓	Photo View / Set Default	Eliaon, Adrian	12/11/2014

## Single VI SPDAT V2

**Objective:** Add and print assessments and capture client photo.

**Navigation:** Case Management>Assessments>VI SPDAT and SPDAT

The screenshot shows the CaseWorthy dashboard with a sidebar on the left containing navigation options like 'Find Client', 'Add Client', 'Case Management', 'Client Information', 'Health Management', 'Assessments', 'Family', 'My CaseWorthy', and 'Time Management'. The main area is titled 'VI SPDAT / SPDAT' and contains several sections: 'VI SPDAT' with icons for 'Single VI SPDAT V1', 'Single Score Summary', 'VI SPDAT Consent Summary', and 'Single VI SPDAT V2' (highlighted with a red box); 'F VI SPDAT' with icons for 'Family VI SPDAT V1', 'Family Score Summary', 'F VI SPDAT Consent Summary', and 'Family VI SPDAT V2'; and 'TAY VI SPDAT'. To the right, there are two tables: 'Family VI SPDAT V2 Pre Screen' and 'TAY VI SPDAT Pre Screen'.

Survey Date	Assessment Event	Housing Subtotal	Risks Subtotal	Socializations Subtotal	Wellness Subtotal	Family Unit Total	Recommendation
05/16/2016 2:01 AM	At Entry		3	2	4	3	Family is Recommended for a Permanent Supportive Housing/Housing First Assessment


Survey Date	Housing Subtotal	Risks Subtotal	Socializations Subtotal	Wellness Subtotal	Recommendation
05/16/2016 2:20 AM	1	4	2	5	Permanent Supportive Housing/Housing First Assessment

Select Single VI SPDAT V2 of the VI SPDAT portion of VI SPDAT and SPDAT dashboard.

The VI SPDAT Version 2 Summary form displays.

The screenshot shows the 'VI SPDAT Version 2 Summary' form. It has a table with columns: Survey Date, General Information, A. History of Housing and Homelessness, B. Risks, C. Socialization and Daily Functions, D. Wellness, Pre Screen Total, Recommendation, and System ID. The 'Add New' button is highlighted with a red box.

Survey Date	General Information	A. History of Housing and Homelessness	B. Risks	C. Socialization and Daily Functions	D. Wellness	Pre Screen Total	Recommendation	System ID
5/3/2016	1	1	2	1	4	9	An assessment for Permanent Supportive Housing/Housing First	14379

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.

VI SPDAT V2 - Individual

**General Information/Consent**

Assessment \* No assessment selected.

Family Or Individual \* Individual

Interviewer's Name \*

HOH Age 0

Agency \*

Survey Date & Time \* 06/13/2016 08:30

Location \*

Has Consented to Participate \*

**A. History of Housing and Homelessness**

1. Where do you sleep most frequently? \*

2. How long has it been since you lived in permanent stable housing (in months)? \*

3. In the last three years, how many times have you been homeless? \*

**B. Risks**

For questions 4a-4f: In the past six months, how many times have you:

4a. Received health care at an emergency department/room? \*

4b. Taken an ambulance to the hospital? \*

4c. Been hospitalized as an inpatient? \*

4d. Used a crisis service, including sexual assault crisis, mental health crisis, family/individual violence, distress centers and suicide prevention hotlines? \*

4e. Talked to police because you witnessed a crime, were the victim of a crime, or the alleged perpetrator of a crime or because the police told you that you must move along? \*

4f. Stayed one or more nights in a holding cell, jail or prison, whether that was a short-term stay like the drunk tank, a longer stay for a more serious offense or anything in between? \*

5. Have you been attacked or beaten up since you've become homeless? \*

6. Have you threatened to or tried to harm yourself or anyone else in the last year? \*

7. Do you have any legal stuff going on right now that may result in you being locked up or having to pay fines, or make it more difficult to rent a place to live? \*

8. Does anybody force or trick you to do things that you do not want to do? \*

9. Do you ever do things that may be considered to be risky like exchange sex for money, run drugs for someone, have unprotected sex with someone you don't know, share a needle, or anything like that? \*

**C. Socialization and Daily Functioning**

10. Is there any person, paid landlord, business, booksie, dealer, or government group like the IRS that thinks you owe them money? \*

11. Do you get any money from the government, a pension, an inheritance, working under the table, a regular job, or anything like that? \*

12. Do you have any planned activities, other than just surviving, that make you feel happy and fulfilled? \*

13. Are you 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? \*

14. Is your homelessness in any way caused by a relationship that broke down, an unhealthy or abusive relationship, or because family or friends caused you to become evicted? \*

**D. Wellness**

15. Have you ever had to leave an apartment, shelter program, or other place you were staying because of your physical health?

16. Do you have any chronic health issues with your liver, kidneys, stomach, lungs or heart?

17. 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?

18. Do you 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?

19. When you are sick or not feeling well, do you avoid getting help?

20. FOR FEMALE RESPONDENTS ONLY: Are you currently pregnant?

21. Has your drinking or drug use led you to being kicked out of an apartment or program where you were staying in the past?

22. Will drinking or drug use make it difficult for you to stay housed or afford your housing?

23a. Have you 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?

23b. Have you 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?

23c. Have you 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?

24. Do you have any mental health or brain issues that would make it hard for you to live independently because you'd need help?

25. Are there any medications that a doctor said you should be taking that, for whatever reason, you are not taking?

26. Are there any medications like painkillers that you don't take the way the doctor prescribed or where you sell the medication?

27. YES OR NO: Has your 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 have experienced?

**Follow Up Questions**

On a regular day, where is it easiest to find you?

What time of day is it easiest to do so?

Ok, I'd like to take your picture so that it is easier to find you and confirm your identity in the future. May I do so?

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.

caused by an experience of emotional, physical, psychological, sexual, or other type of abuse, or by any other trauma you have experienced?

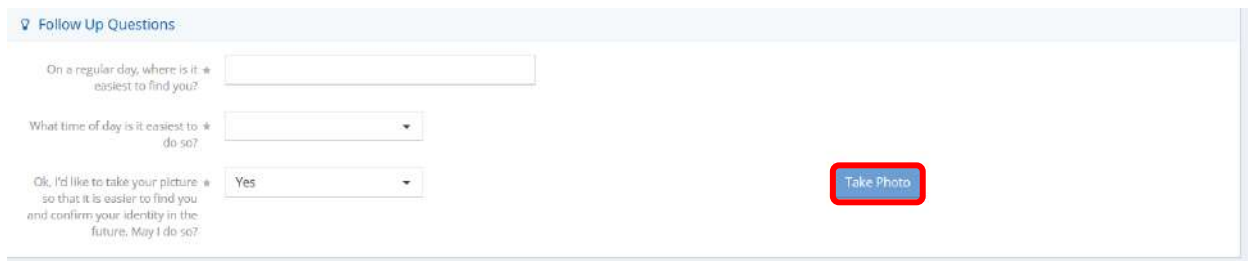
**Follow Up Questions**

On a regular day, where is it easiest to find you?

What time of day is it easiest to do so?

Ok, I'd like to take your picture so that it is easier to find you and confirm your identity in the future. May I do so?

A **Take Photo** button appears.



Follow Up Questions

On a regular day, where is it \*  
easiest to find you?

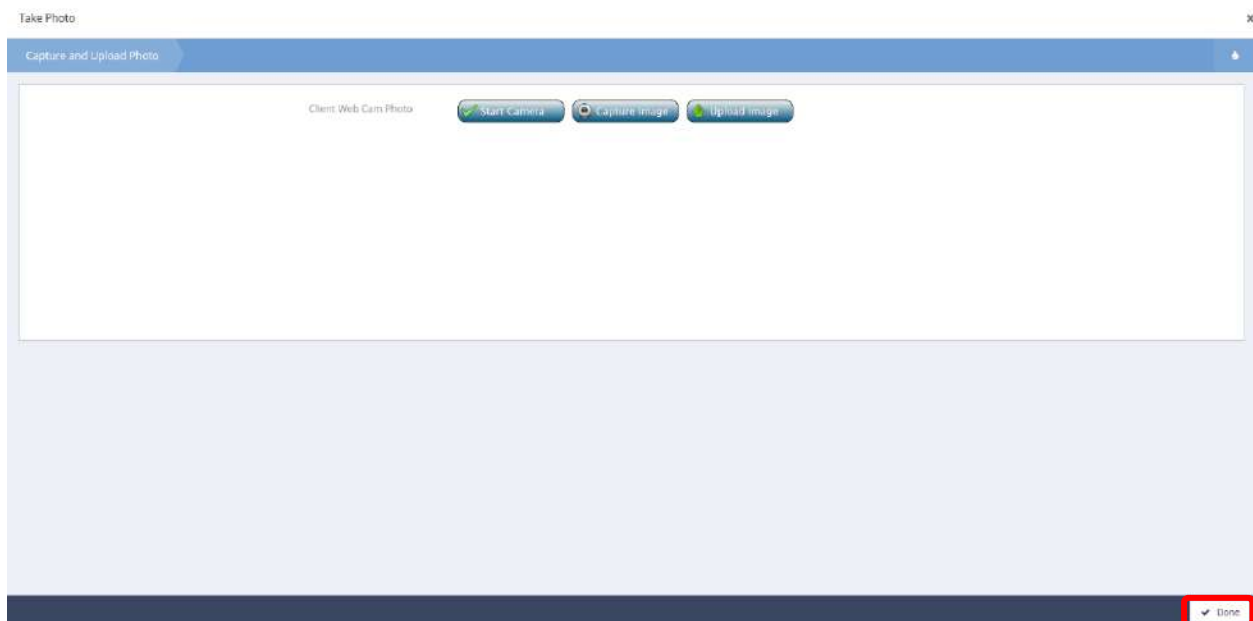
What time of day is it easiest to \*  
do so?

Ok, I'd like to take your picture \*  
so that it is easier to find you  
and confirm your identity in the  
future. May I do so?

**Take Photo**

Click the **Take Photo** button.

The Capture and Upload Photo form displays.




Take Photo

Capture and Upload Photo

Client Web Cam Photo

Follow the steps as outlined in the form. Click the  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.

VI SPDAT Version 2 Summary

Survey	General	A. History of Housing and Homelessness	B. Risks	C. Socialization and Daily Functions	D. Wellness	Pre Screen Total	Rec
<div>  <div> <div>Edit</div> <div>Print</div> </div> </div>		1	2	1	4	9	An a Hou

The VI SPDAT PDF Report form displays.

VI SPDAT PDF Report PDF Export

**Administration**

Interviewer: Kathleen Agency: Staff

Survey Date: 05/03/2016 Location: Here

**Basic Information**

First Name: James Last Name: Wrapp

Alias: Mitchell, mitchell Language: English

Birth Date: 12/04/2007 Age: 8

SSN: 123-78-9456 Full Yes Consent: Yes No Consent:

If the person is 60 years of age or older, score 1: 1

**A. History of Housing**

1) Where do you sleep most frequently? Safe Haven

Sleep Total: 0

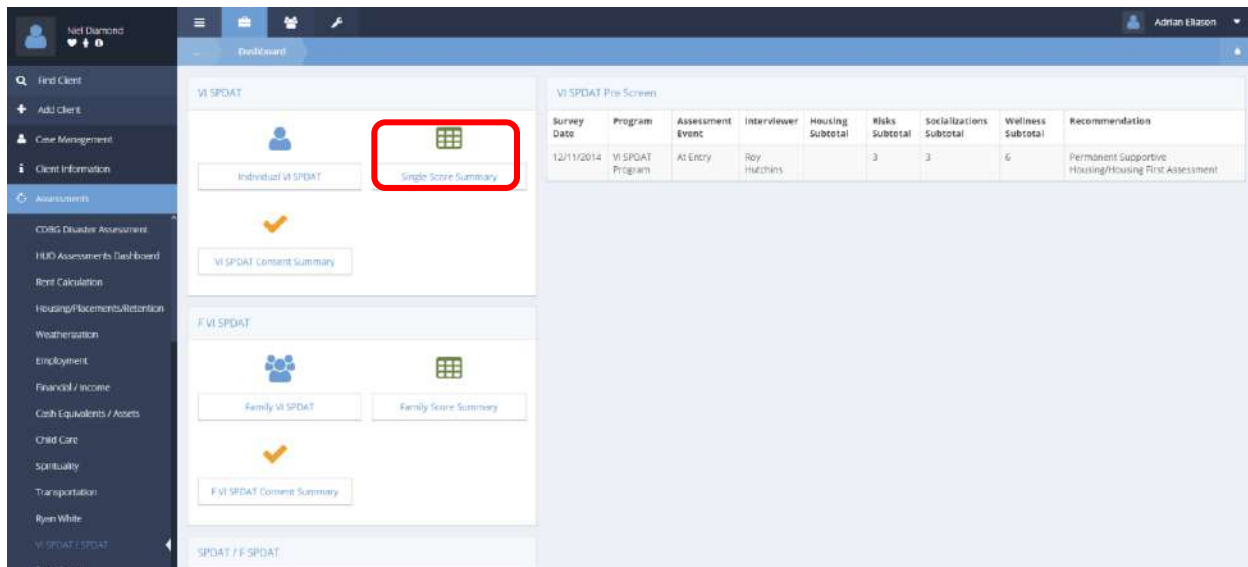
Cancel

Select the PDF Export button. The report downloads. Print according to any appropriate computer settings.

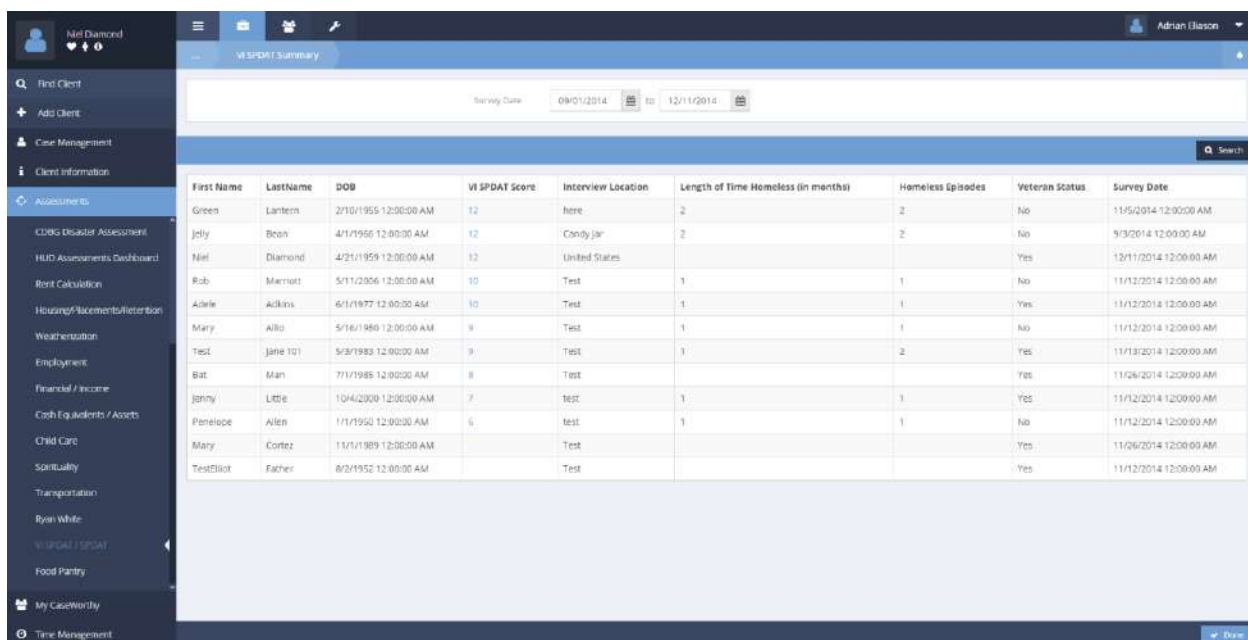


## Individual VI SPDAT Score Summary

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.

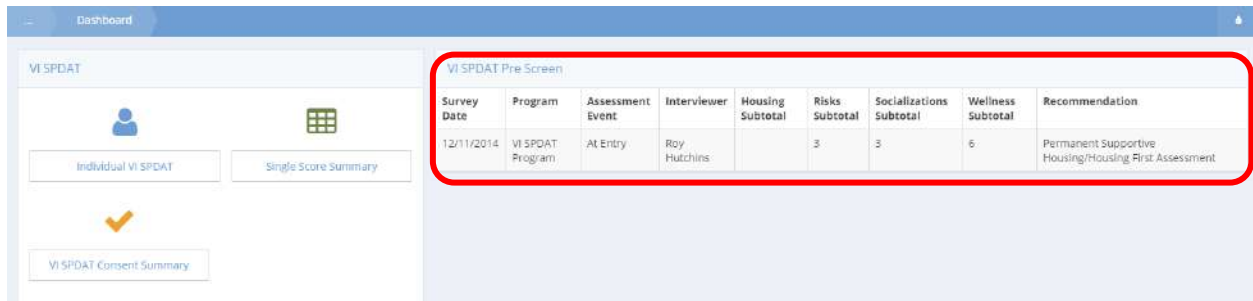


The form that displays presents all individual VI SPDAT scores for the selected date range. This form is not filtered by current client.




### 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 screenshot shows the VI SPDAT Dashboard. On the left, there are buttons for 'Individual VI SPDAT', 'Single Score Summary', and 'VI SPDAT Consent Summary'. On the right, the 'VI SPDAT Pre Screen' table is displayed and highlighted with a red box. The table contains the following data:

Survey Date	Program	Assessment Event	Interviewer	Housing Subtotal	Risks Subtotal	Socializations Subtotal	Wellness Subtotal	Recommendation
12/11/2014	VI SPDAT Program	At Entry	Roy Hutchins		3	3	6	Permanent Supportive Housing/Housing First Assessment

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 screenshot shows the VI SPDAT Summary form. The table displays the following data:

	Information	A. History of Housing and Homelessness	B. Risks	C. Socialization and Daily Functions	D. Wellness	Pre Screen Total	Recommendation
1	0	3	3	6	12	Permanent Supportive Housing/Housing First Assessment	

The action menu for the first row is open, showing options: 'Edit Workflow', 'VI SPDAT Single' (highlighted with a red box), and 'Delete'.

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

The screenshot shows the CaseWorthy dashboard with a sidebar on the left containing navigation options like 'Find Client', 'Add Client', 'Case Management', 'Client Information', 'Health Management', 'Assessments', 'Family', 'My CaseWorthy', and 'Time Management'. The main area is titled 'VI SPDAT / SPDAT' and contains several sections: 'VI SPDAT' with icons for 'Single VI SPDAT V1', 'Single Score Summary', 'VI SPDAT Consent Summary', and 'Single VI SPDAT V2'; 'F VI SPDAT' with icons for 'Family VI SPDAT V1', 'Family Score Summary', 'F VI SPDAT Consent Summary', and 'Family VI SPDAT V2' (highlighted with a red box); and 'TAY VI SPDAT'. To the right, there are two tables: 'Family VI SPDAT V2 Pre Screen' and 'TAY VI SPDAT Pre Screen'.

Survey Date	Assessment Event	Housing Subtotal	Risks Subtotal	Socializations Subtotal	Wellness Subtotal	Family Unit Total	Recommendation
05/16/2016 2:01 AM	At Entry		3	2	4	3	Family is Recommended for a Permanent Supportive Housing/Housing First Assessment



Survey Date	Housing Subtotal	Risks Subtotal	Socializations Subtotal	Wellness Subtotal	Recommendation
05/16/2016 2:20 AM	1	4	2	5	Permanent Supportive Housing/Housing First Assessment

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.

The screenshot shows the 'Family VI SPDAT Version 2 Summary' form. At the top right, there is a '+ Add New' button highlighted with a red box. Below the header is a search bar. The main area contains a table with assessment data.

	Survey Date	General Information	A. History of Housing and Homelessness	B. Risks	C. Socialization and Daily Functions	D. Wellness	Pre Screen Total	Recommendation	System ID
⚙	5/3/2016	1	1	1	2	2	10	An Assessment for Permanent Supportive Housing/Housing First	14814

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.

Family VI SPDAT Version 2

General Information/Consent

Assessment: No assessment selected.

Family Or Individual: Family

Agency: [Dropdown]

Location: [Dropdown]

Is there a second parent currently part of the household?: [Dropdown]

Interviewer's Name: [Text]

Survey Date & Time: 06/13/2016 10:53 a

Has Consented to Participate: [Dropdown]

Children

1. How many children under the age of 18 are currently with you? [Text] Answered

2. How many children under the age of 18 are not currently with your family, but you have reason to believe they will be joining you when you get housed? [Text] Answered

3. Is any member of this family currently pregnant? [Dropdown]

A. Housing

5. Where do you and your family sleep most frequently? [Dropdown]

6. How long has it been since you and your family lived in permanent stable housing (in months)? [Text] Answered

7. In the last three years, how many times have you and your family been homeless? [Text] Answered

B. Risks

8a. In the past 6 months, how many times have you or anyone in your family received health care at an emergency department/room? [Text] Answered

8b. In the past 6 months, how many times have you or anyone in your family taken an ambulance to the hospital? [Text] Answered

8c. In the past 6 months, how many times have you or anyone in your family been hospitalized as an inpatient? [Text] Answered

8d. In the past 6 months, how many times have you or anyone in your family used a crisis service, including sexual assault crisis, mental health crisis, family/intimate violence, distress centers and suicide prevention hotlines? [Text] Answered

8e. In the past 6 months, how many times have you or anyone in your family talked to police because they witnessed a crime, were the victim of a crime, or the alleged perpetrator of a crime or because the police told them that they must move along? [Text] Answered

8f. In the past 6 months, how many times have you or anyone in your family stayed 1 or more nights in a holding cell, jail or prison, whether that was a short-term stay like the drunk tank, a longer stay for a more serious offense, or anything in between? [Text] Answered

9. Have you or anyone in your family been attacked or beaten up since they've become homeless? [Dropdown]

10. Have you or anyone in your family threatened to or tried to harm themselves or anyone else in the last year? [Dropdown]

11. Do you or anyone in your family have any legal stuff going on right now that may result in them being locked up, having to pay fines, or that make it more difficult to rent a place to live? [Dropdown]

12. Does anybody force or trick you or anyone in your family to do things that you do not want to do? [Dropdown]

13. Do you or anyone in your family ever do things that may be considered to be risky like exchange sex for money, run drugs for someone, have unprotected sex with someone they don't know, share a needle, or anything like that? [Dropdown]

### C. Socialization

14. Is there any person, part landlord, business, broker, dealer, or government group like the IRS that thinks you or anyone in your family owe them money?

16. Does everyone in your family have planned activities, other than just surviving, that make them feel happy and fulfilled?

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?

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?

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?

### 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?

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?

23. When someone in your family is sick or not feeling well, does your family avoid getting medical help?

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 past head injury?

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?

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?

20. Do you or anyone in your family have any chronic health issues with your liver, kidneys, stomach, lungs or heart?

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?

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?

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?

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?

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?

### E. Family Unit

32. Are there any children that have been removed from the family by a child protection service within the last 180 days?

34. In the last 180 days have any children lived with family or friends because of your homelessness or housing situation?

37. Have the members of your family changed in the last 180 days, due to things like divorce, your kids coming back to live with you, someone leaving for military service or incarceration, a relative moving in, or anything like that?

39. Do you have two or more planned activities each week as a family such as outings to the park, going to the library, visiting other family, watching a family movie, or anything like that?

40a. After school, or on weekends or days when there isn't school, is the total time children spend each day where there is no interaction with you or another responsible adult 2 or more hours per day for children aged 12 or older?

33. Do you have any family legal issues that are being resolved in court or need to be resolved in court that would impact your housing or who may live within your housing?

35. Has any child in the family experienced abuse or trauma in the last 180 days?

38. Do you anticipate any other adults or children coming to live with you within the first 180 days of being housed?

40b. After school, or on weekends or days when there isn't school, is the total time children spend each day where there is no interaction with you or another responsible adult 8 or more hours per day for children aged 18 or older?

### Follow Up Questions

On a regular day, where is it easiest to find you?

What time of day is it easiest to do so?

OK, I'd like to take your picture so that it is easier to find you and confirm your identity in the future. May I do so?

Save

Cancel

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.

General Information/Consent

Assessment: No assessment selected.

Family Or Individual: Family

Agency: [Dropdown]

Location: [Dropdown]

Is there a second parent currently part of the household?: [Dropdown] (highlighted with a red box)

Interviewer's Name: [Text]

Survey Date & Time: 05/17/2016 10:16 a

Has Consented to Participate: [Dropdown]

The new field Second Parent appears upon selection.

Agency: [Dropdown]

Location: [Dropdown]

Is there a second parent currently part of the household?: Yes

Second Parent: [Text] (highlighted with a red box)


Survey Date & Time: 06/13/2016 08:53 a

Has Consented to Participate: Yes

Children

1. How many children under the age of [Text] Answered

2. How many children under the age of [Text] Answered

Use the magnifying glass  icon to select a parent.

The Select Family Member form displays.

Select Family Member Lookup

Select Family Member

Total Rows: 1

Name	Suffix	Age	Relation To HoH
Writer, DeeDee		42	Other Relative

Select a family member from one of the rows.

General Information/Consent

Assessment: 5/4/2016 - CC Emergency Services - During

Family Or Individual: Family

Agency: [Dropdown]

Location: [Dropdown]


Is there a second parent currently part of the household?: Yes

Second Parent: Writer, DeeDee (highlighted with a red box)

Interviewer's Name: [Text]

Survey Date & Time: 05/17/2016 10:21 a

Has Consented to Participate: [Dropdown]

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.



Family VI SPDAT Version 2 Summary								
Survey	General	ion	A. History of Housing and Homelessness	B. Risks	C. Socialization and Daily Functions	D. Wellness	Pre Screen Total	Recomm
<div> <div>Edit</div> <div>Print</div> </div>			0	3	2	4	12	An Assess Housing/H

The VI SPDAT Family PDF Report form displays.

VI SPDAT Family PDF Report
PDF Export

Administration

Interviewer: Ronda
Agency: Team
Survey Date: 05/16/2016
Location: Here

Basic Information

Parent One:
First Name: Doc
Last Name: Writer
Alias:
Language: English
Birth Date: 05/03/2016
Age: 0
SSN: 654-65-4654
Full
Yes Consent: Yes
No Consent:
No second parent currently part of household:
Parent 2:
First Name: DeeDee
Last Name: Writer
Alias:
Primary Language: English
Birth Date: 07/20/1973
Age: 42

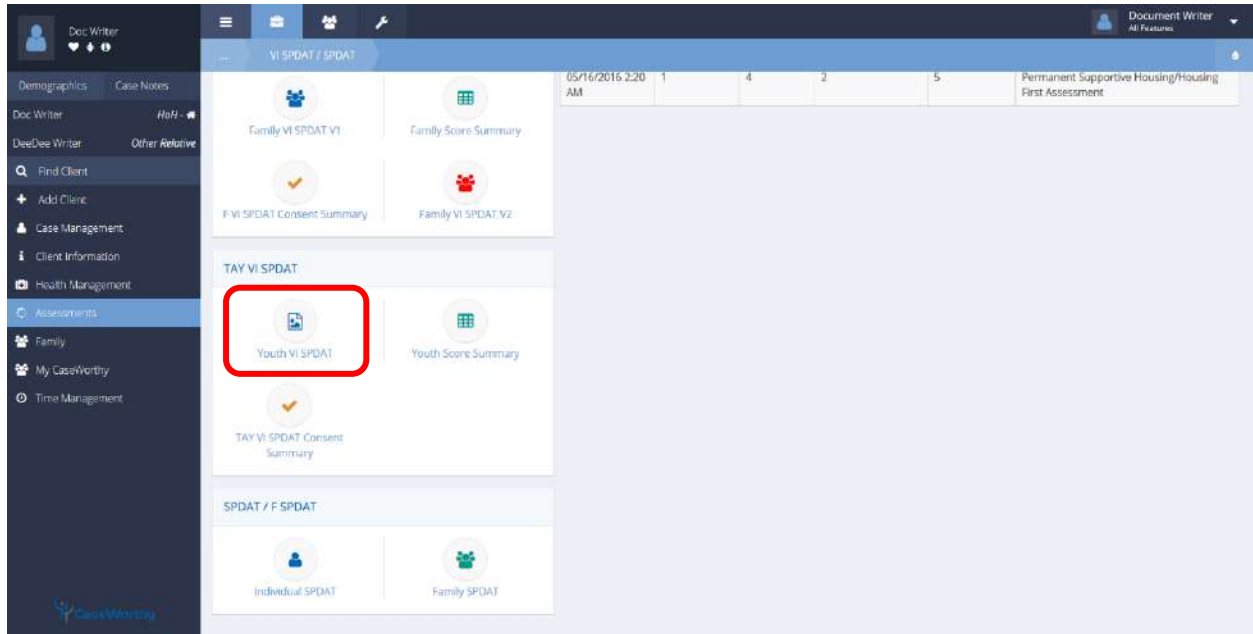
Cancel

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.

VI SPDAT Youth Summary <span>+ Add New</span>									
	Survey Date	General Information	A. History of Housing and Homelessness	B. Risks	C. Socialization and Daily Functions	D. Wellness	Pre Screen Total	Recommendation	System ID
⚙	5/16/2016	1	1	4	2	5	13	Assessment for long-term housing with high service intensity	15482

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.

VI SPDAT V2 - Youth

### General Information/Consent

Assessment \* No assessment selected.

Family Or individual \* Youth

Client Age \* 0

Agency \*

Location \*

Interviewer's Name \*

Survey Date & Time \* 06/13/2016 09:08 a

Has Consented to Participate \*

### A. History of Housing

1. Where do you sleep most frequently?

2. How long has it been since you lived in permanent stable housing (in months)? Answered

3. In the last three years, how many times have you been homeless? Answered

### B. Risks

For questions 4a-4f: In the past six months, how many times have you:

4a. Received health care at an emergency department/room? Answered

4b. Taken an ambulance to the hospital? Answered

4c. Been hospitalized as an inpatient? Answered

4d. Used a crisis service, including sexual assault crisis, mental health crisis, family/intimate violence, distress centers and suicide prevention hotlines? Answered

4e. Talked to police because you witnessed a crime, were the victim of a crime, or the alleged perpetrator of a crime or because the police told you that you must move along? Answered

4f. Stayed one or more nights in a holding cell, jail, prison or juvenile detention, whether it was a short term stay like the drunk tank, a longer stay for a more serious offense, or anything in between? Answered

5. Have you been attacked or beaten up since you've become homeless?

6. Have you threatened to or tried to harm yourself or anyone else in the last year?

7. Do you have any legal stuff going on right now that may result in you being kicked up or having to pay fines, or make it more difficult to rent a place to live?

8. Were you ever incarcerated when younger than age 18?

9. Does anybody force or trick you to do things that you do not want to do?

10. Do you ever do things that may be considered to be risky like exchange sex for money, run drugs for someone, have unprotected sex with someone you don't know, share a needle, or anything like that?

### C. Socialization and Daily Functioning

11. Is there any person, past landlord, business, broker, dealer, or government group like the IRS that thinks you owe them money?

12. Do you get any money from the government, an inheritance, an allowance, working under the table, a regular job, or anything like that?

13. Do you have planned activities, other than just surviving, that make you feel happy and fulfilled?

14. Are you 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?

15a. Is your current lack of stable housing because you ran away from your family home, a group home or a foster home?

15b. Is your current lack of stable housing because of a difference in religious or cultural beliefs from your parents, guardians or caregivers?

15c. Is your current lack of stable housing because your family or friends caused you to become homeless?

15d. Is your current lack of stable housing because of conflicts around gender identity or sexual orientation?

15e. Is your current lack of stable housing because of violence at home between family members?

15f. Is your current lack of stable housing because of an unhealthy or abusive relationship, either at home or elsewhere?

**D. Wellness**

16. Have you ever had to leave an apartment, shelter program, or other place you were staying because of your physical health?

17. Do you have any chronic health issues with your liver, kidneys, stomach, lungs or heart?

18. 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?

19. Do you 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?

20. When you are sick or not feeling well, do you avoid getting medical help?

21. Are you currently pregnant, have you ever been pregnant, or have you ever gotten someone pregnant?

22. Has your drinking or drug use led you to being kicked out of an apartment or program where you were staying in the past?

23. Will drinking or drug use make it difficult for you to stay housed or afford your housing?

24. If you've ever used marijuana, did you ever try it at age 12 or younger?

25a. Have you 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?

25b. Have you 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?

25c. Have you 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?

26. Do you have any mental health or brain issues that would make it hard for you to live independently because you'd need help?

27. Are there any medications that a doctor said you should be taking that, for whatever reason, you are not taking?


28. Are there any medications like painkillers that you don't take the way the doctor prescribed or where you sell the medication?


**Follow Up Questions**

On a regular day, where is it easiest to find you?

What time of day is it easiest to do so?

Ok, I'd like to take your picture so that it is easier to find you and confirm your identity in the future. May I do so?

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.

VI SPDAT Youth Summary						
Survey	General	A. History of Housing and Homelessness	B. Risks	C. Socialization and Daily Functions	D. Wellness	
<div>  Edit              Print         </div>		1	4	2	5	

The VI SPDAT Youth PDF Report form displays.

VI SPDAT Youth PDF Report PDF Export

**Administration**

Interviewer: Will Agency: Staff

Survey Date: 05/16/2016 Location: Clinic

**Basic Information**

First Name: Doc Last Name: Writer

Alias: Language: English

Birth Date: 05/03/2016 Age: 0

SSN: 654-65-4654 Full Yes Consent: Yes No Consent:

If the person is 17 years of age or less, score 1: 1

**A. History of Housing**

1) Where do you sleep most frequently?: Shelters

Sleep Total: 0

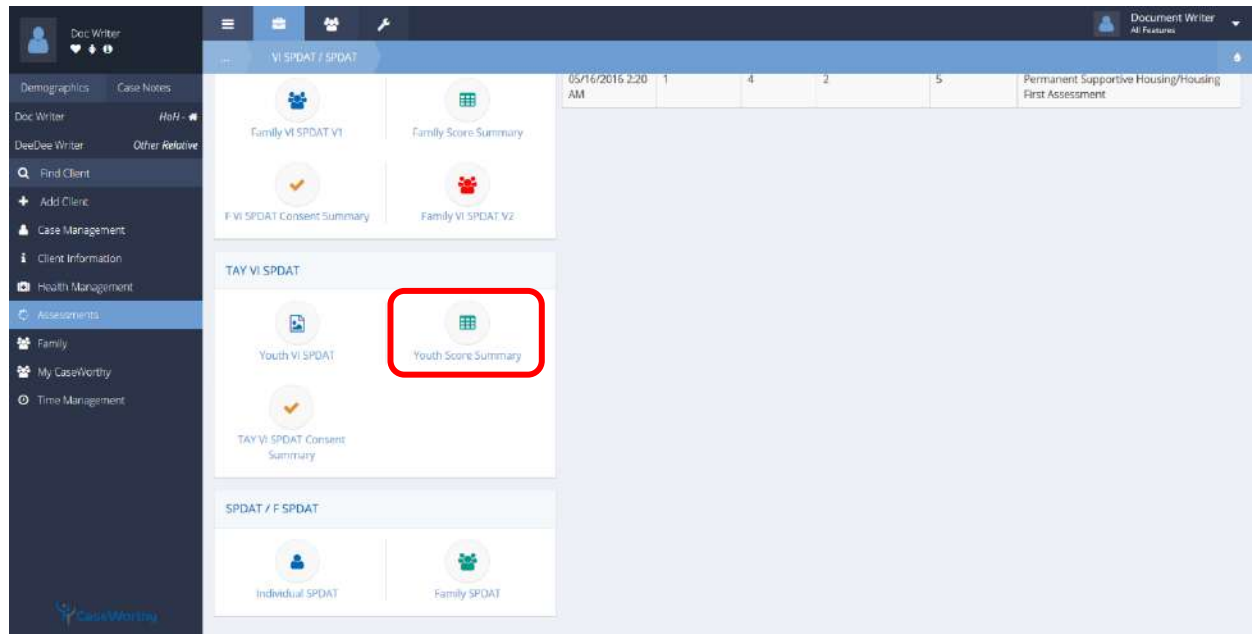
Cancel

Select the **PDF Export** button. The report downloads. Print according to any appropriate computer settings.

## Youth Score Summary

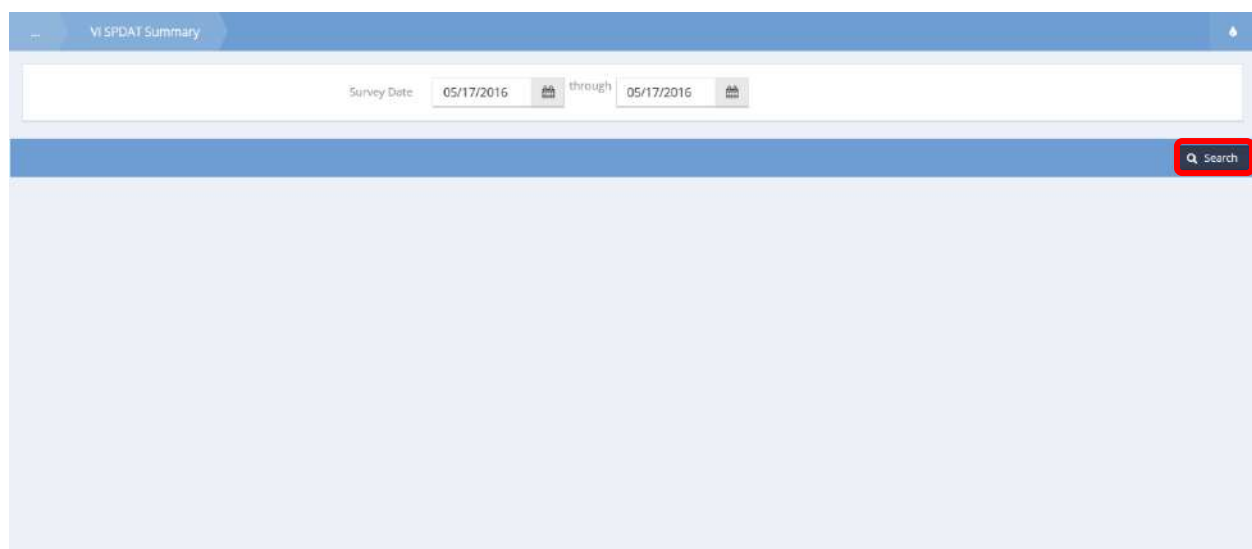
**Objective:** View score summary for Youth VISPDAT assessments.


**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.

VI SPDAT Summary

Survey Date 05/05/2015 through 05/19/2016

Total Rows: 5

First Name	Last Name	DOB	VI SPDAT Score	Interview Location	Length of Time Homeless (in months)	Homeless Episodes	Survey Date
Dean	Thomas	1/1/1999	14	Neighborhood	15		10/21/2015 9:36:00 AM
New VI	Test	3/2/2000	12	fasdfdsf	1	4	11/4/2015 2:22:00 PM
Ben	Wyatt	4/1/2000	11	Clink	15	98	5/5/2016 8:34:00 AM
TAY	VISPDAT	3/3/2000	10	Youth Agency	1	2	11/3/2015 11:13:00 AM
Eleanor	Beardsley	1/1/1985	7	Test	2	2	10/13/2015 4:00:00 AM

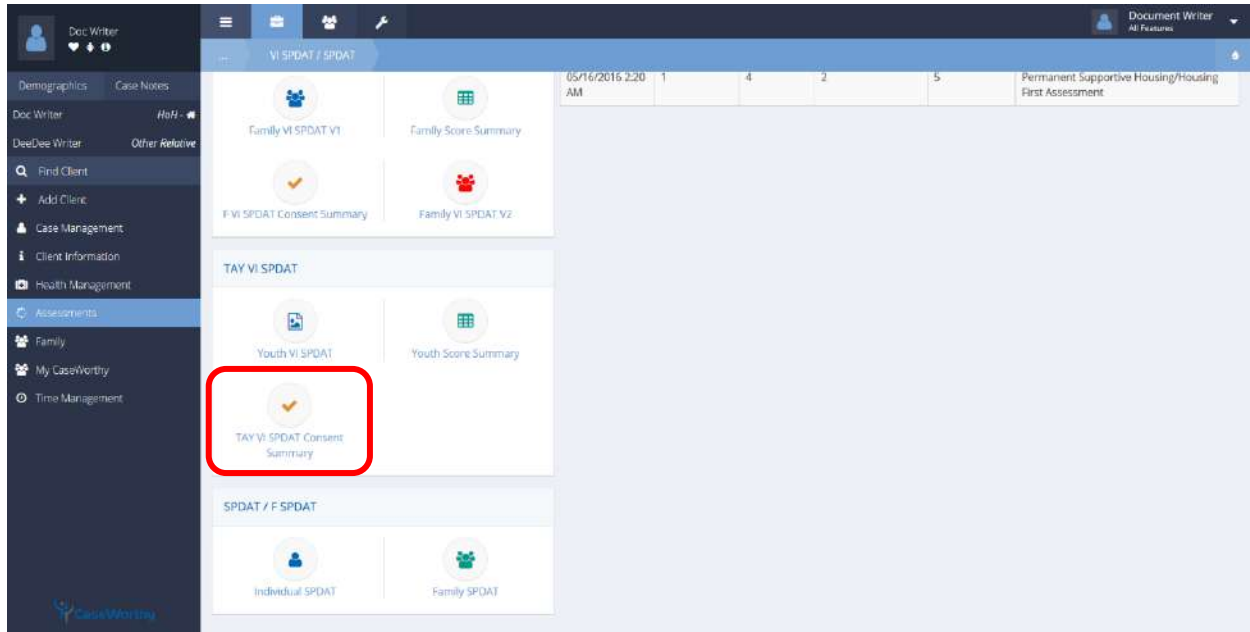
Done

This is a view only form. Click the  button when finished.

## TAY VI SPDAT Consent Summary

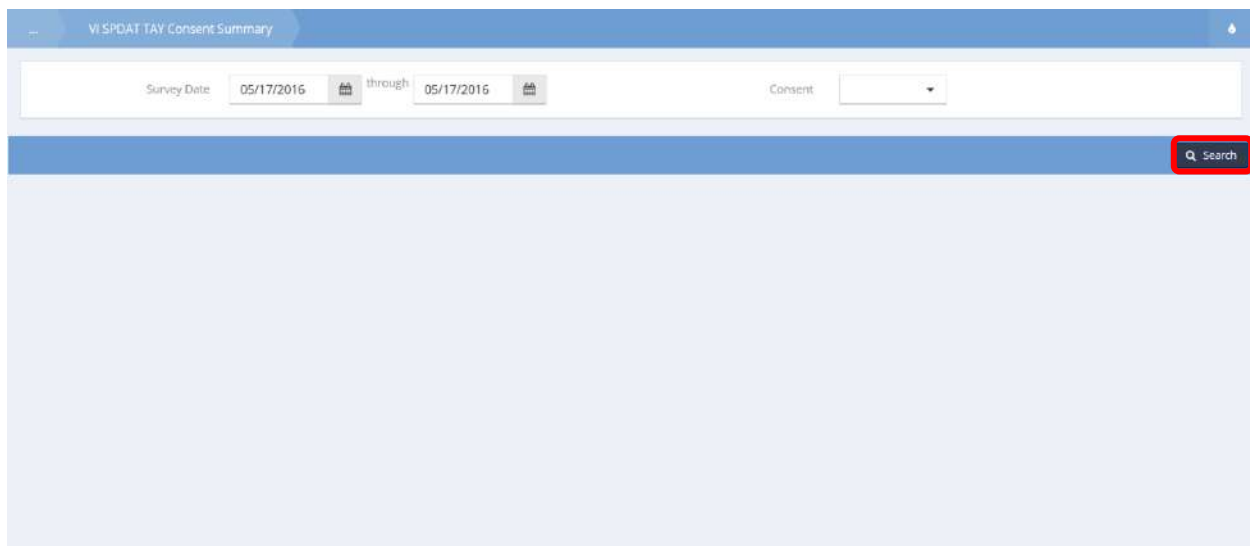
**Objective:** View TAY VI SPDAT summary based on consent given.

**Navigation:** Case Management>Assessments>VI SPDAT and SPDAT




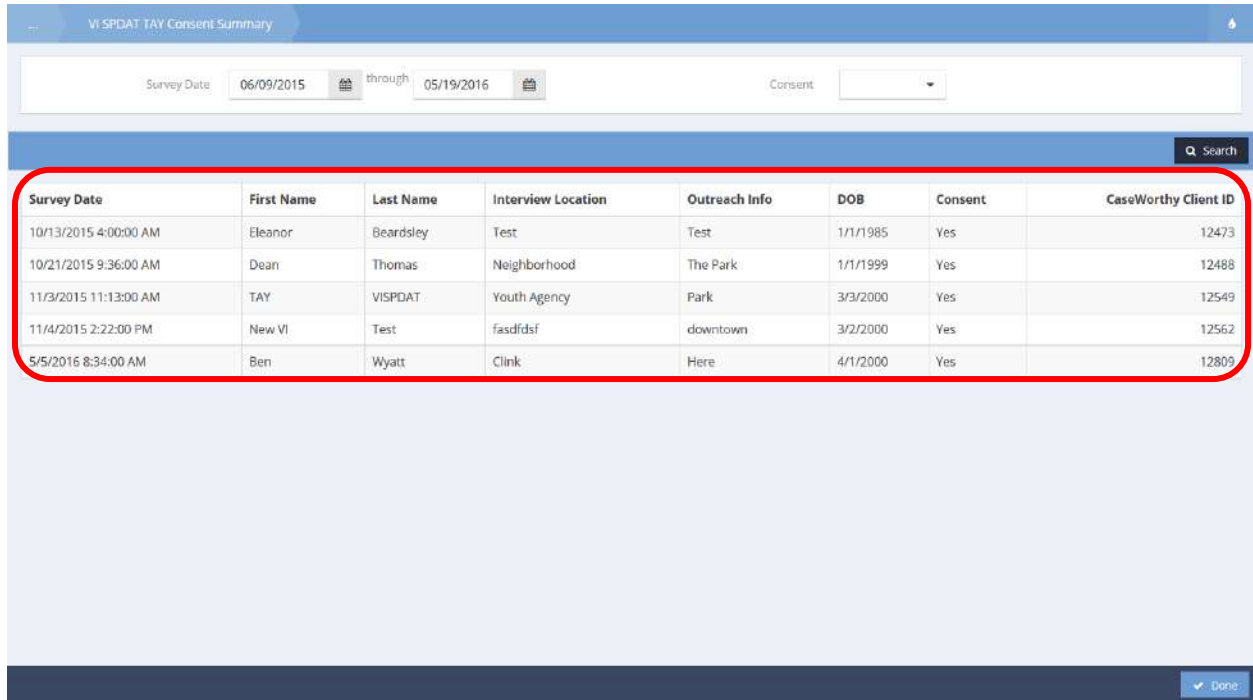
Select TAY VI SPDAT Consent Summary from the TAY VI SPDAT portion of the VI SPDAT and SPDAT dashboard.

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  button to display existing assessments within the specified time frame.



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

This is a view only form. Click the  button when finished.

## Family VI SPDAT

The screenshot shows the CaseWorthy dashboard. On the left is a sidebar menu with various assessment categories. The 'Assessments' section is expanded, showing sub-menus for 'VI SPDAT' and 'F VI SPDAT'. The 'F VI SPDAT' sub-menu is highlighted with a red box, and the 'Family VI SPDAT' icon within it is also highlighted with a red box. The main dashboard area displays a 'VI SPDAT Pre Screen' table with the following data:

Survey Date	Program	Assessment Event	Interviewer	Housing Subtotal	Risks Subtotal	Socializations Subtotal	Wellness Subtotal	Recommendations
12/11/2014	VI SPDAT Program	At Entry	Roy Hutchins		3	3	6	Permanent Supportive Housing/Housing First Assessment

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 screenshot shows the 'Family VI SPDAT Summary' screen. At the top right, there is a '+ Add New' button highlighted with a red box. Below the header is a table with the following columns:

Survey Date	General Information	A. History of Housing and Homelessness	B. Risks	C. Socialization and Daily Functions	D. Wellness	E. Family Unit Total	Pre Screen Total	Recommendation
-------------	---------------------	----------------------------------------	----------	--------------------------------------	-------------	----------------------	------------------	----------------

The workflow displays.

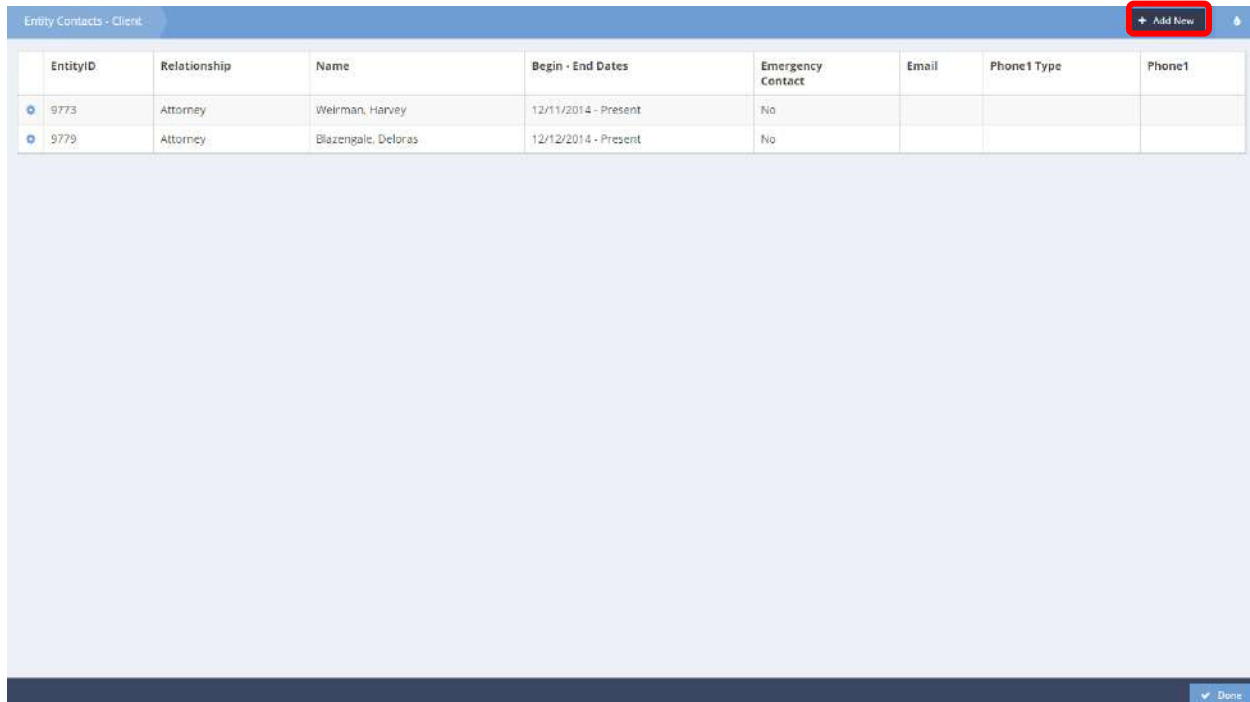
The screenshot shows the 'Add New VI SPDAT Client' workflow in the CaseWorthy system. The form is titled 'Identifying' and contains the following fields and sections:

- Identifying Section:**
  - First Name:
  - Last Name:
  - Nick Name:
  - Birth Date:
  - Age:
  - Gender:
  - SSN:
  - Check For Duplicates:
  - Which VI SPDAT would you like to fill out for this client?:
  - Citizenship Status:
  - Language in which client is best able to express himself:
  - Has client ever served in the U.S. Military?:
- Contact Information Section:**
  - Ask the client: Is there a phone number and/or email where someone can get in touch with you or leave a message?
  - Cell Phone:
  - Work Phone:
  - Home Phone:
  - Email:
- Sharing Section:**
  - Relation to HOH:
  - Sharing:

The form is part of a larger application with a sidebar menu and a top navigation bar. The sidebar menu includes options like 'Add New VI SPDAT Client', 'Client Contact Add Spreadsheet', 'VI SPDAT Enrollment Add/Edit', 'Assessment', 'Photo View / Set Default', 'Add VI SPDAT HOH 2', 'Add Family Member (Children)', and 'Spreadsheet'. The top navigation bar shows the user's name 'Adrian Elason'.

Enter the first section of identifying information including name, date of birth, social security number and gender. Click on the  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  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  button.

The next step in the workflow appears.



EntityID	Relationship	Name	Begin - End Dates	Emergency Contact	Email	Phone1 Type	Phone1
9773	Attorney	Weisman, Harvey	12/11/2014 - Present	No			
9779	Attorney	Blaezengale, Deloras	12/12/2014 - Present	No			

A list of the client's contact displays. To add a new client, click the **+ Add New** button. When finished, click the **✓ Done** button.

Client Contact Add Spreadsheet

Last Name:  First Name:

Begin Date: 12/11/2014 End Date: Present

Relationship:  Category: Choose Options...

**Contact Information**

Phone 1 Type:  Phone 1:

Phone 2 Type:  Phone 2:

Email:

Confirm Email:

Is Emergency Contact: ☐

Save Cancel

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.

Add VI SPDAT HOH 2

Click on the Cancel button to skip this form. Identifying

First Name:  Last Name:

Nickname:

Birth Date:  Full Age: NaN

SSN:  Full

Gender:

Check For Duplicates

Citizenship Status:

Language in which client is best able to express him/herself: English

Has client ever served in the US Military?:

Ask the client: Is there a phone number and/or email where someone can get in touch with you or leave a message?

Cell Phone:  Home Phone:


Work Phone:  Email:


**Sharing**

Relation to HOH:



Sharing: Shared

Save Cancel

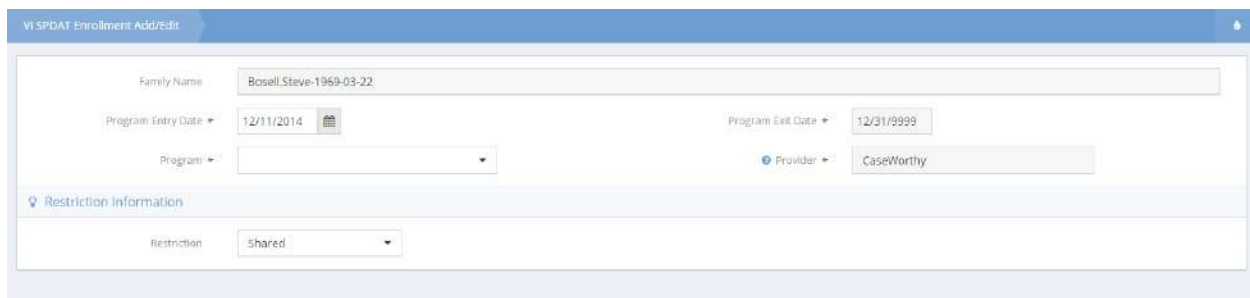
To add a second head of household, fill out the form following the example of the Add New Client form. If no second head of household is to be added, click on the  **Cancel** button. The next step of the workflow displays.



First Name *	Last Name *	Dupe Check *	Birth Date *	Age	Gender *
<input checked="" type="checkbox"/> Steve	Bosell		3/22/1969	45	Male
<input checked="" type="checkbox"/> April	Bosell		4/19/1970	44	Female

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.



Family Name: Bosell, Steve-1969-03-22

Program Entry Date: 12/11/2014


Program Exit Date: 12/31/9999


Program: [dropdown]

Provider: CaseWorthy

Restriction Information

Restriction: Shared

 **Save**

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.

The screenshot shows the 'General Information/Consent' section of the 'Bosell, Steve - VI SPDAT Survey Information - Part 1' form. The 'Assessment' dropdown is set to '12/11/2014 - VI SPDAT Program - At Entry'. The 'Family Or Individual' dropdown is set to 'Family'. The 'Interviewer's Name' field is empty. The 'Agency' dropdown is empty. The 'Survey Date & Time' is set to '12/11/2014' at '12:00' in the 'a' (AM) period. The 'Location' field is empty. The 'Has Consented to Participate' dropdown is empty. A 'Next' button is located at the bottom right of the form.

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.

The screenshot shows the 'Children' section of the 'Diamond, Niel (Holt) - Family VI SPDAT Survey Information Part 1' form. The 'General Information/Consent' section is collapsed. The 'Children' section contains three questions, each with an 'Answered' dropdown menu: 'Total number of children under the age of 18 that are currently with the \* head[s] of household', 'How many children under the age of 18 are not currently, \* with your family, but you have reason to believe they will be joining you when you get housed?', and 'Is any member of the family currently pregnant? \*'. At the bottom of the form are 'Previous' and 'Next' buttons.

Ask the client the questions, enter their responses and click the **Next** button to continue. The housing related questions appear.

Bosell, Steve (HCH) - Family VI SPDAT Survey Information Part 1

7

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  button to continue. The risk related questions appear.

Bozell, Steve (Host) - Family VI SPDAT Survey Information Part 1

General Information/Consent

Children

A. Housing

B. Risks (SCRIPT: "I am going to ask you some questions about your interactions with health and emergency services. If you need any help figuring out when six months ago was, just let me know.")

3. In the past six months, how many times have you and/or members of your family been to the emergency department/room?  Answered

4. In the past six months, how many times have you and/or members of your family had an interaction with the police?  Answered

5. In the past six months, how many times have you and/or members of your family been taken to the hospital in an ambulance?  Answered

6. In the past six months, how many times have you and/or members of your family used a crisis service including distress centers or suicide prevention hotlines?  Answered

7. In the past six months, how many times have you and/or members of your family been hospitalized as an in-patient, including hospitalizations in a mental health hospital?  Answered


8. Have you or has any family member been attacked or beaten up since becoming homeless?

9. Have you or has any family member threatened to or tried to harm yourself or anyone else in the last year?

10. Do you or does any member of the family have any legal stuff going on right now that may result in incarceration or having to pay fines?

11. Does anybody force or trick you or any family member to do things that you do not want to do?

12. Do you or does any family member ever do things that may be

Ask the client the questions, enter their responses and click the  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.


Bozell, Steve - VI SPDAT Survey: Wellness

Assessment 12/11/2014 - VI SPDAT Program - At Entry

Do you or does any family member have now, ever had, or had a healthcare provider ever tell you that you have any of the following medical conditions:

Medical Conditions *	Answer *
<input checked="" type="checkbox"/> Kidney disease/ Stage Renal Disease or Dialysis	
<input checked="" type="checkbox"/> History of frostbite, Hypothermia, or Immersion Foot	
<input checked="" type="checkbox"/> Liver Disease, Cirrhosis, or End-Stage Liver Disease	
<input checked="" type="checkbox"/> HIV/AIDS	
<input checked="" type="checkbox"/> History of Heat Stroke/Heat Exhaustion	
<input checked="" type="checkbox"/> Heart disease, Arrhythmia, or irregular Heartbeat	
<input checked="" type="checkbox"/> Emphysema	
<input checked="" type="checkbox"/> Diabetes	
<input checked="" type="checkbox"/> Asthma	
<input checked="" type="checkbox"/> Cancer	
<input checked="" type="checkbox"/> Hepatitis C	
<input checked="" type="checkbox"/> Tuberculosis	

Save Cancel

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.

Bosell, Steve - VI SPDAT Survey Information Part 3

ID, Wellness (Continued)

Assessment: 12/11/2014 - VI SPDAT Program - At Entry

OBSERVATION ONLY - DO NOT ASK \*

34. Surveyor, do you observe signs or symptoms of a serious health condition?

35. Have you ever had problematic drug or alcohol use, abused drugs or alcohol, or told you do?

36. Have you consumed alcohol and/or drugs almost every day or every day for the past month?

37. Have you ever used injection drugs or shots in the last six months?

38. Have you ever been treated for drug or alcohol problems and returned to drinking or using drugs?

39. Have you used non beverage alcohol like cough syrup, mouthwash, rubbing alcohol, cooking wine, or anything like that in the past six months?

40. Have you blacked out because of your alcohol or drug use in the past month?

OBSERVATION ONLY - DO NOT ASK \*

41. Surveyor, do you observe signs or symptoms of problematic alcohol or drug abuse?

42. Ever been taken to a hospital against your will for a mental health reason?

43. Gone the emergency room because you weren't feeling 100% well emotionally or because of your nerves?

44. Spoken with a psychiatrist, psychologist or other mental health professional in the last six months because of your mental health - whether that was voluntary or because someone insisted that you do so?

45. Had a serious brain injury or head trauma?

46. Ever been told you have a learning disability or developmental disability?

47. Do you have any problems concentrating and/or remembering things?

OBSERVATION ONLY - DO NOT ASK \*

48. Surveyor, do you detect signs or symptoms of severe, persistent mental illness or severely compromised cognitive functioning?

49. Have you had any medicines prescribed to you by a doctor that you do not take, sell, had stolen, misplaced, or where the prescriptions were never filled?

50. Yes or No - Have you experienced any emotional, physical, psychological, sexual or other type of abuse or trauma in your life which you have not sought help for, and/or which has caused your homelessness?

Save

Ask the client the questions, enter their responses and click the  Save button to continue.

The family unit related questions appear.

E. Family Unit

53. Do any of your children spend two or more hours per day when you don't know where they are?

54. On most days, do any children do tasks that adults would normally do like preparing meals, getting other children ready for bedtime, shopping, cleaning the apartment, or anything like that?

55. What is the total number of times adults in the family have changed in the family over the past year because of things like new relationships or a breakdown in the relationship, prison, military deployment, or anything like that?  Answered ▾

56. What is the total number of times that children have been separated from the family or returned to the family over the past year?  Answered ▾

57. Are there any school-aged children that are not enrolled in school or missing more days of school than they are attending?

58. Right now or at any point in the last six months have any of your children been separated from you to live with a family member or friend?

59. Has there been any involvement with any member of your family and child protective services in the last six months - even if it was resolved?

60. Has your family had anything in family court over the past six months or anything currently being considered in family court?

[< Previous](#) [Save](#)

Ask the client the questions, enter their responses and click the [Save](#) button to continue. The next step in the assessment appears.

Bosell, Steve (Holt) - Family VI SPDAT Questionnaire

Assessment 12/16/2014 - Family VI SPDAT - At Entry ▾

Where did your family live prior to becoming homeless?

Have you or has any other family member ever been in foster care?

Have you or has any other family member ever been in jail?


Have you or has any family member ever been in prison?

Do you or any member of the family have a permanent physical disability that limits mobility? (i.e. wheelchair, amputation, unable to climb stairs?)

What kind of health insurance do you have, if any? (check all that apply)  Choose Options... ▾

On a regular day, where is it easiest to find you and what time of day is it easiest to do so?

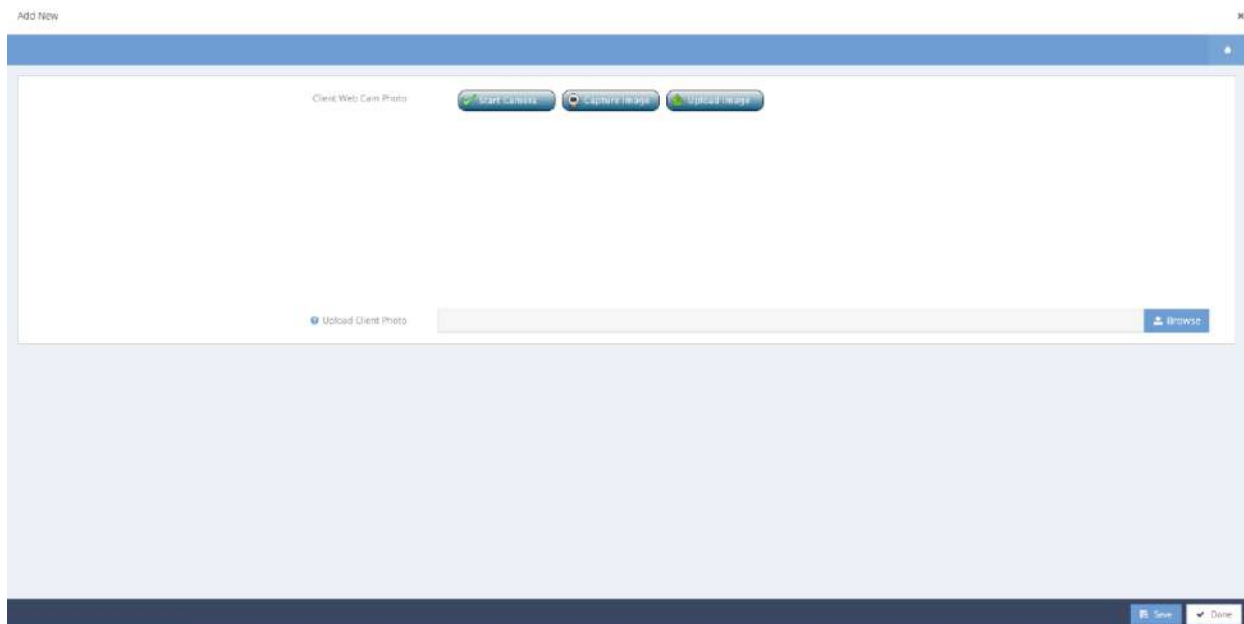
Ok, now I'd like to take your picture. May I do so?



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


The screenshot shows the CaseWorthy dashboard with a sidebar on the left containing navigation options like 'Find Client', 'Add Client', 'Case Management', and 'Assessments'. The main content area displays several summary cards for 'VI SPDAT' and 'F VI SPDAT'. A table titled 'Family VI SPDAT Pre-Screen' is highlighted with a red box. This table contains the following data:

Survey Date	Program	Assessment Event	Interviewer	Housing Subtotal	Risks Subtotal	Socializations Subtotal	Wellness Subtotal	Family Unit Total	Recommendation
12/15/2014	Family VI SPDAT	At Entry	Roy Hutchins		3	3	2	2	Family is Recommended for a Rapid Re-Housing Assessment

Below this table, there are sections for 'Individual SPDAT' and 'Family SPDAT', each with their own summary tables.

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.

Family VI SPDAT Summary									Add New	
Survey Date	General Information	A. History of Housing and Homelessness	B. Risks	C. Socialization and Daily Functions	D. Wellness	E. Family Unit Total	Pre Screen Total	Recommendation		
12/15/2014	1	0	3	3	2	2	11	Permanent Supportive Housing/Housing First Assessment		

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

Family VI SPDAT Summary									Add New	
Survey Date	General Information	A. History of Housing and Homelessness	B. Risks	C. Socialization and Daily Functions	D. Wellness	E. Family Unit Total	Pre Screen Total	Recommendation		
12/15/2014	1	0	3	3	2	2	11	Permanent Supportive Housing/Housing First Assessment		

Click on the gear icon to open the action menu.

- View Family Composition
- Print Summary Report
- Delete

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 screenshot shows the CaseWorthy VI SPDAT Dashboard. On the left is a navigation menu with options like 'Find Client', 'Add Client', 'Case Management', 'Client Information', and 'Assessments'. The main area is divided into sections: 'VI SPDAT' with 'Individual VI SPDAT' and 'Single Score Summary' buttons; 'F VI SPDAT' with 'Family VI SPDAT' and 'Family Score Summary' buttons (the latter is highlighted with a red box); and 'SPDAT / F SPDAT' with 'Individual SPDAT' and 'Family SPDAT' buttons. On the right, there are four data tables: 'VI SPDAT Pre Screen', 'Family VI SPDAT Pre Screen', 'Individual SPDAT', and 'Family SPDAT'.

Survey Date	Program	Assessment Event	Interviewer	Housing Subtotal	Risks Subtotal	Socializations Subtotal	Wellness Subtotal	Recommendation
12/15/2014	VI SPDAT Program	At Entry	Roy Hutchins		3	3	4	Permanent Supportive Housing/Housing First Assessment

Survey Date	Program	Assessment Event	Interviewer	Housing Subtotal	Risks Subtotal	Socializations Subtotal	Wellness Subtotal	Family Unit Total	Recommendation
12/16/2014	Family VI SPDAT	At Entry	Roy Hutchins		3	3	2	2	Family is Recommended for a Rapid Re-Housing Assessment

Assessment Date	ProgramName	Assessment Event	TotalScore	Intervention
12/15/2014	Shelter Plus Care	During	1	Housing Help Supports

Assessment Date	ProgramName	Assessment Event	TotalScore	Intervention
12/15/2014	Family Support	During	40	Rapid Re-housing

The form that displays presents all family VI SPDAT scores for the selected date range. This form is not filtered by current client.

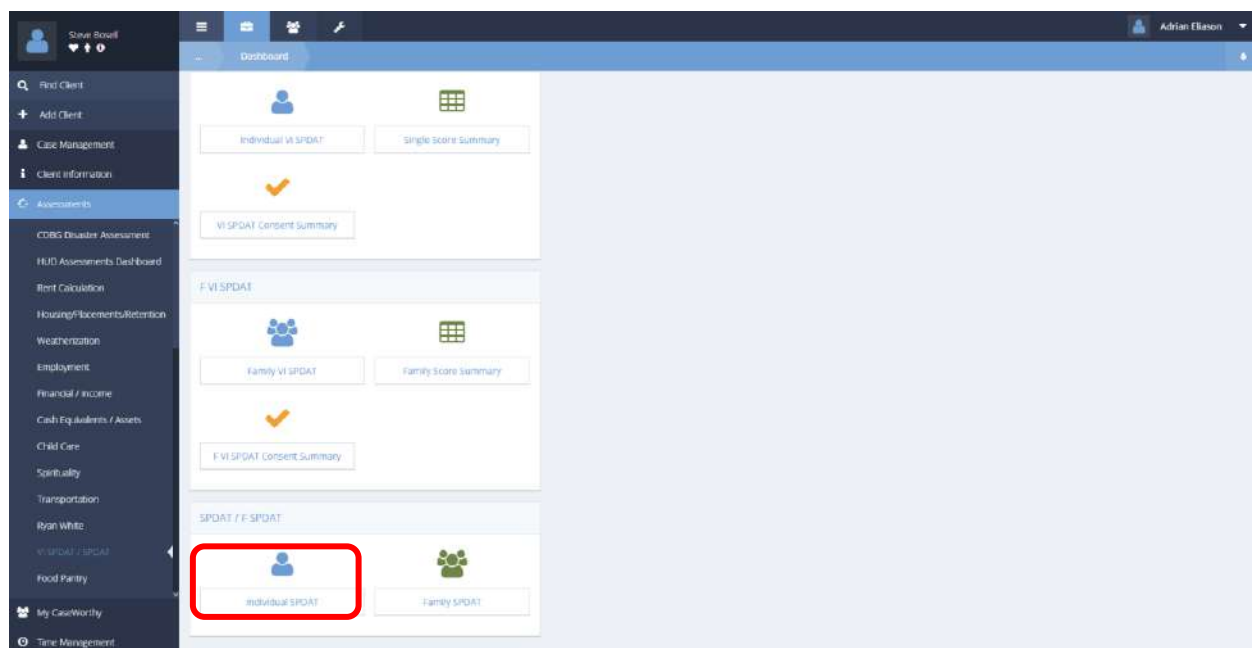
The screenshot shows the 'Family VI SPDAT Summary' form. At the top, there is a 'Survey Date' filter set to '12/16/2014' to '12/16/2014'. Below the filter is a table with the following columns: Survey Date, First Name, LastName, ECM Client ID, VI SPDAT Score, Heads of Household, Children With HOH, Children Not With HOH, DOB, Interview Location, Length of Time Homeless (in months), Homeless Episodes, and Veteran Status. The table contains one row of data for Steve Bosell.

Survey Date	First Name	LastName	ECM Client ID	VI SPDAT Score	Heads of Household	Children With HOH	Children Not With HOH	DOB	Interview Location	Length of Time Homeless (in months)	Homeless Episodes	Veteran Status
12/16/2014 12:00:00 AM	Steve	Bosell	9765	11	2			3/22/1969	United States			NO

## 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.

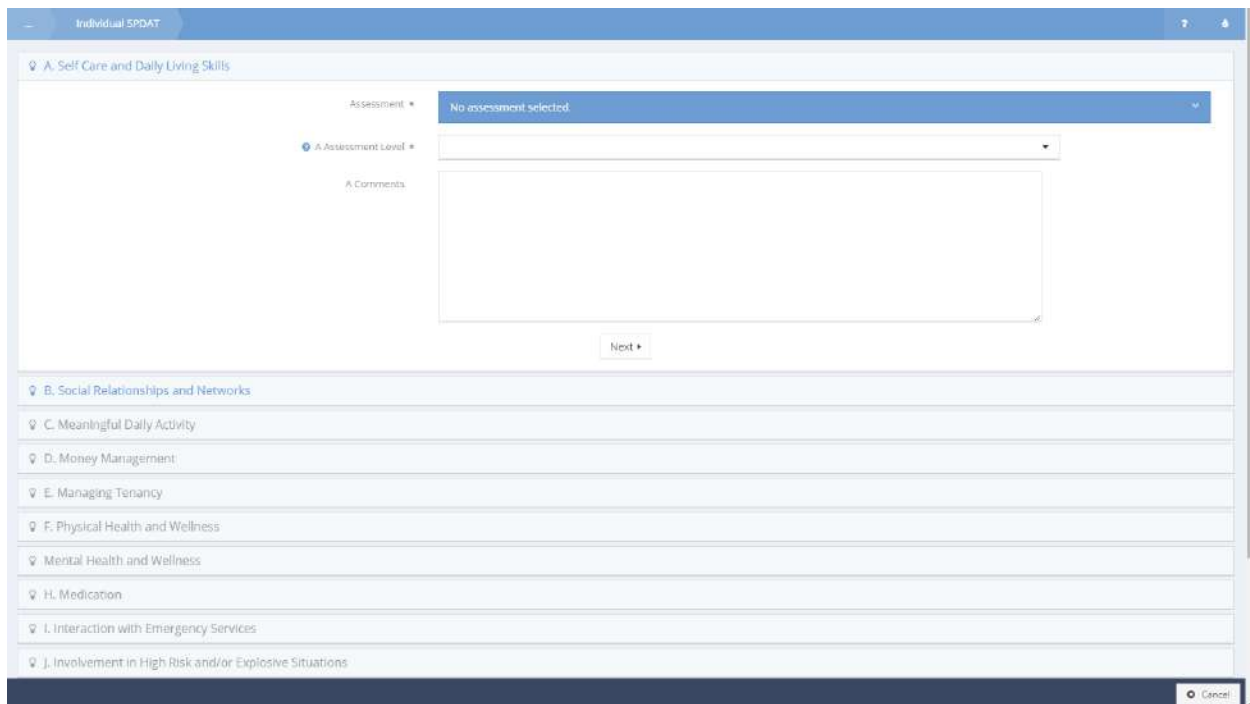
### *Individual SPDAT*

To create a new SPDAT assessment, proceed from the dashboard by clicking on the Individual SPDAT icon. The Individual SPDAT Summary form displays.



The image shows the top section of the 'Individual SPOAT Summary' page. It features a blue header bar with the title 'Individual SPOAT Summary' on the left and a red-outlined button labeled '+ Add New' on the right. Below the header is a row of 16 tabs: 'Total Score', 'Self Care', 'Relationships', 'Daily Activity', 'Money', 'Tenancy', 'Physical Wellness', 'Mental Health', 'Medication', 'Emergency Services', 'Risky Situations', 'Substance Use', 'Abuse', 'Harm Risk', 'Legal', and 'Housing and Homelessness'. The 'Total Score' tab is currently selected.

To initiate the assessment, click on the **+ Add New** button. The Individual SPDAT form displays.



The image shows the 'Individual SPDAT' form. The title bar at the top says 'Individual SPDAT'. The main content area is titled 'A. Self Care and Daily Living Skills'. It contains three fields: 'Assessment' (a dropdown menu with 'No assessment selected' as the default value), 'A. Assessment Level' (a dropdown menu), and 'A. Comments' (a large text area). Below these fields is a 'Next >' button. At the bottom of the form, there is a list of other assessment categories: 'B. Social Relationships and Networks', 'C. Meaningful Daily Activity', 'D. Money Management', 'E. Managing Tenancy', 'F. Physical Health and Wellness', 'G. Mental Health and Wellness', 'H. Medication', 'I. Interaction with Emergency Services', and 'J. Involvement in High Risk and/or Explosive Situations'. A 'Cancel' button is located at the bottom right corner.

The default value for the Assessment field is “No Assessment Selected”.

Assessment \*

No assessment selected.

Click on the field. The field expands.

Assessment \*

No assessment selected.

+ New Assessment Copy Current Assessment Copy Assessments Edit Date/Restriction

Date	Program	Type	
12/12/2014	1 English for Employment	At Entry	
12/12/2014	Family Support	At Entry	
12/12/2014	Shelter Plus Care	At Entry	

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

A new window opens.

New Assessment

Enrollment \*

Assessment Type \*

Assessment By \* aeliason

Assessment Begin Date 12/15/2014


Restriction \* Shared

Save

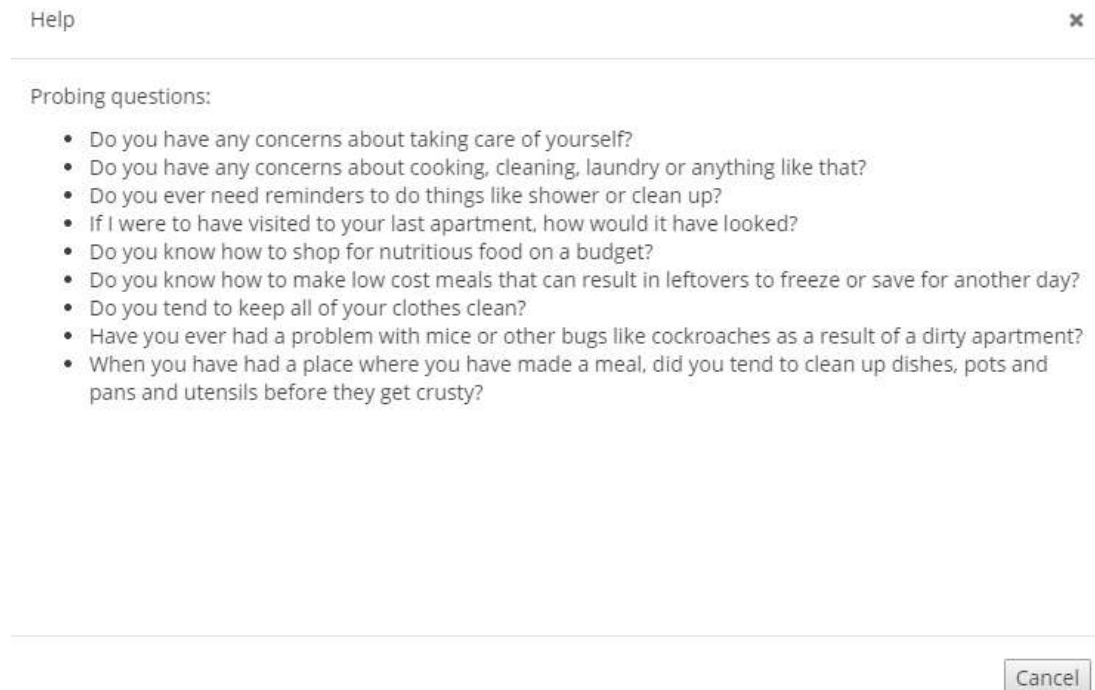
Select the desired Enrollment and Assessment Type. Make any other desired alterations. Click on the **Save** button.

The Self-Care and Daily Living Skills section of the form expands.

The screenshot displays the 'Individual SPOAT' form interface. At the top, a blue header bar contains the text 'Individual SPOAT' and a help icon. Below the header, the form is divided into sections. The first section, 'A. Self Care and Daily Living Skills', is expanded and highlighted in light blue. It contains three fields: 'Assessment' with a dropdown menu showing '12/15/2014 - Shelter Plus Care - During', 'A. Assessment Level' with a dropdown menu, and 'A. Comments' with a large text area. A 'Next' button is located below the 'A. Comments' field. Below the expanded section, a list of other sections is visible, each with a dropdown arrow: 'B. Social Relationships and Networks', 'C. Meaningful Daily Activity', 'D. Money Management', 'E. Managing Tenancy', 'F. Physical Health and Wellness', 'G. Mental Health and Wellness', 'H. Medication', 'I. Interaction with Emergency Services', and 'J. Involvement in High Risk and/or Explosive Situations'. At the bottom right of the form, there is a 'Cancel' button.

Click on the Help  icon.

The probing questions for this section display in a new window.




Help

Probing questions:

- Do you have any concerns about taking care of yourself?
- Do you have any concerns about cooking, cleaning, laundry or anything like that?
- Do you ever need reminders to do things like shower or clean up?
- If I were to have visited to your last apartment, how would it have looked?
- Do you know how to shop for nutritious food on a budget?
- Do you know how to make low cost meals that can result in leftovers to freeze or save for another day?
- Do you tend to keep all of your clothes clean?
- Have you ever had a problem with mice or other bugs like cockroaches as a result of a dirty apartment?
- When you have had a place where you have made a meal, did you tend to clean up dishes, pots and pans and utensils before they get crusty?

Cancel

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  button. The questions window closes and the user is returned to the form.



Individual SPOAT


A Self Care and Daily Living Skills

Assessment: 12/15/2014 - Shelter Plus Care - During

A Assessment Level:

- Takes care of self and meets all daily living needs by infrequently accessing community resources as needed.
- Attempts to take care of self and meet all daily living needs, but has a few areas for which assistance is sometimes required; may not be living independently (staying in a shelter).
- Not always taking care of self and/or not always aware of what needs to be done to take care of self or daily needs; can require prompts; requires frequent assistance; may excessively acquire belongings (hoard or collect) but is aware that it is an issue.
- Not taking care of self or meeting daily needs; often unaware and almost always needs prompts; requires intensive, frequent assistance; may excessively acquire belongings (hoard or collect) but is not fully aware or is not at all aware that it is an issue.


A Comments:


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  button.

The Self Care and Daily Living Skills section collapses and the Social Relationships and Networks section of the assessment expands.

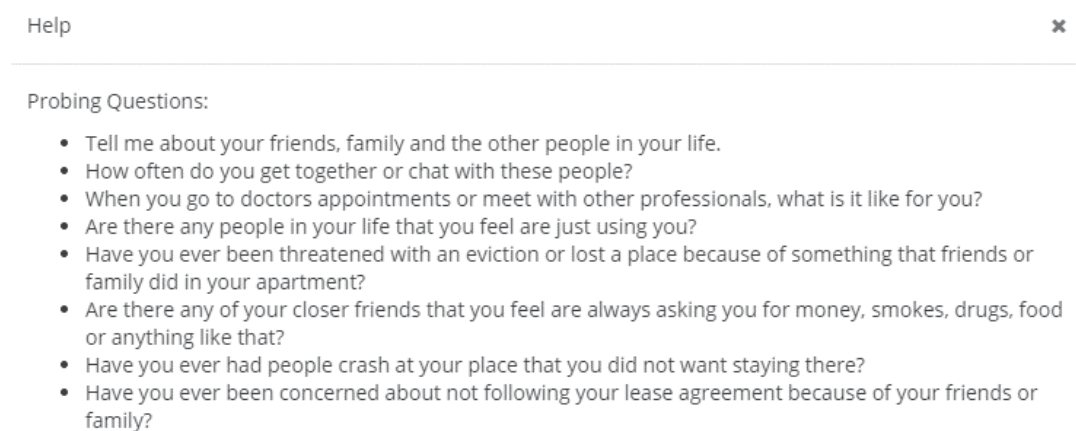
The screenshot shows a web-based form titled 'Individual SPDAT'. It has two main sections: 'A. Self Care and Daily Living Skills' and 'B. Social Relationships and Networks'. Section B is currently expanded. Within section B, there is a dropdown menu labeled 'B Assessment Level' and a large text area labeled 'B Comments'. At the bottom of the form, there are two buttons: 'Previous' and 'Next'.

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  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  button.

The probing questions for each section are presented here.

The screenshot shows a 'Help' window with a title bar containing the word 'Help' and a close button (X). The main content area is titled 'Probing Questions:' and contains a bulleted list of seven questions related to social relationships and networks. The questions are: 1. Tell me about your friends, family and the other people in your life. 2. How often do you get together or chat with these people? 3. When you go to doctors appointments or meet with other professionals, what is it like for you? 4. Are there any people in your life that you feel are just using you? 5. Have you ever been threatened with an eviction or lost a place because of something that friends or family did in your apartment? 6. Are there any of your closer friends that you feel are always asking you for money, smokes, drugs, food or anything like that? 7. Have you ever had people crash at your place that you did not want staying there? 8. 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 you 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?

▼ J. Involvement in High Risk and/or Explosive Situations

▼ K. Substance Use

▼ L. Abuse and/or Trauma

▼ M. Risk of Personal Harm/Harm to Others

▼ N. Legal

▼ O. History of Homelessness and Housing


ⓘ Assessment Level ▲ Cumulative duration of homelessness was less than 7 days over the past four years, which may include being recently i

ⓘ Comments

Total Score 1

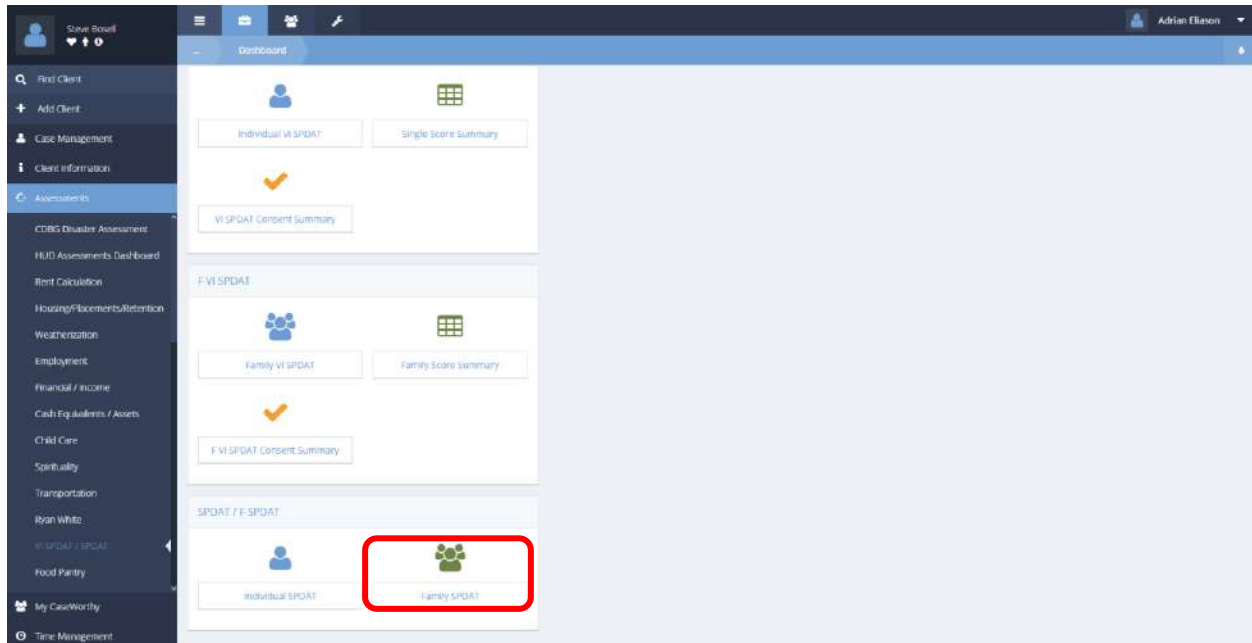
◀ Previous Save

Cancel

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.

Individual SPDAT Summary																Add New	
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 screenshot shows the 'Add Family SPDAT' form. It has a blue header bar with the title 'Add Family SPDAT'. Below the header, there are three sections, each with a light blue background and a white border. Section A is titled 'A. Self Care and Daily Living Skills of Family Head'. It contains an 'Assessment' dropdown menu with 'No assessment selected.' as the selected option, an 'A Assessment Level' dropdown menu, and a 'A Comments' text area. Section B is titled 'B. Social Relationships and Networks'. It contains a 'B Assessment Level' dropdown menu and a 'B Comments' text area. Section C is titled 'C. Meaningful Daily Activity'. It contains a 'C Assessment Level' dropdown menu and a 'C Comments' text area. At the bottom right of the form, there are 'Save' and 'Cancel' buttons.

The default value for the Assessment field is "No Assessment Selected".

Assessment \*

No assessment selected.

Click on the field. The field expands.

Assessment \*

No assessment selected.

+ New Assessment   Copy Current Assessment   Copy Assessments   Edit Date/Restriction

Date	Program	Type	
12/15/2014	Shelter Plus Care	During	
12/12/2014	1 English for Employment	At Entry	
12/12/2014	Family Support	At Entry	
12/12/2014	Shelter Plus Care	At Entry	

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

A new window opens.

New Assessment

Enrollment \*


Assessment Type \*

Assessment By \* aeliason

Assessment Begin Date 12/15/2014

Restriction \* Shared

Save

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.

Help

Probing questions:

- Do you or does any member of your family have any concerns about taking care of yourself?
- Do you or does any member of your family have any concerns about cooking, cleaning, laundry or anything like that?
- Do you or does any member of your family ever need reminders to do things like shower or clean up?
- If I had come over to your last apartment, how would it have looked?
- Do you or does any member of your family know how to shop for nutritious food on a budget?
- Do you or does any member of your family know how to make low cost meals that can result in leftovers to freeze or save for another day?
- Do you or does any member of your family tend to keep all of your clothes clean?
- Have you or has any member of your family ever had a problem with mice or other bugs like cockroaches as a result of a dirty apartment?
- When your family has had a place where you have made a meal, did you tend to clean up dishes, pots and pans and utensils before they got crusty?

Cancel

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.

... Add Family SPDAT

A Self Care and Daily Living Skills of Family Head

Assessment \* 12/15/2014 - Family Support - During

A Assessment Level \*

A Comments

Nothing--

Head(s) of household takes care of self and ensures other family members achieve all daily living needs independently & lives independently. Not in Permanent Supportive Housing. Does not need other community resources.

Most of the time, head(s) of household take care of self and ensures other family members achieve all daily living needs by infrequently accessing other community resources as needed.


Attempts amongst head(s) of household to take care of persons and meet all daily living needs, but has a few areas where assistance is sometimes required; may not be living independently (staying in a shelter).

Head(s) of household not always taking care of persons and/or not always aware of what needs to be done to take...

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  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 you 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 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?

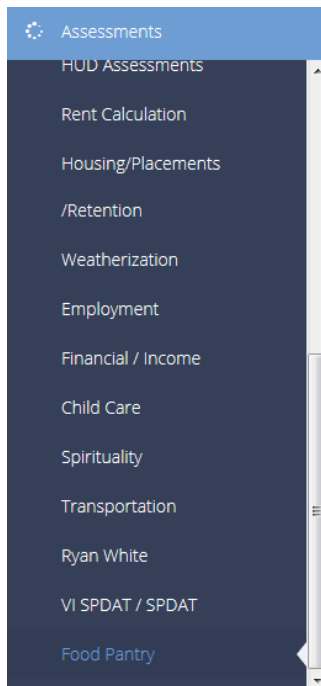
The sections entitled Parental Engagement, Stability and Resiliency of Family Unit, Needs Of Children, Size Of Family and Interaction with Child Protective Services and/or Family Court have no probing questions help screen.

The screenshot displays the Family SPDAT assessment form. Section S, titled 'S. Size Of Family', includes an 'Assessment Level' dropdown menu with the text 'For one parent families: at least one child aged 7-11; and/or two children of any age. For two parent families: at least on...' and a 'Comments' text area. Section T, titled 'T. Interaction with Child Protective Services and/or Family Court', includes an 'Assessment Level' dropdown menu with the text 'Interactions with child protective services have occurred within the past six months, up to and including the removal of...' and a 'Comments' text area. At the bottom left, the 'Total Score' is displayed as '40'. At the bottom right, there are 'Save' and 'Cancel' buttons.

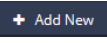
After completing all sections of the assessment, the Family SPDAT score appears in the lower left of the form. If finished, click on the Save button. The Family SPDAT Summary form displays with the just completed assessment listed.

Family SPQAT 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.



The screenshot shows the 'Food Pantry Summary' form. At the top right, there is a blue bar with a white plus icon and the text 'Add New', which is highlighted with a red rectangle. Below this bar, it says 'Total Rows: 1'. A table with one row is displayed below.

Assessment Date	Program	Assessment Event	Is Infant Formula	Comment
2/24/2015 11:54:00 AM	Adult Education	During	False	

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

**Family Management**

**Family**

- Family
- Enrollments
- Services
- Service Plans
- Financials
- Case Notes**

**Family Members**

Birth Date	First Name	Last Name	Relationship	Living with HH
01/01/1950	Nuevo	Cliente	Self	true
04/04/1962	Maria	Cliente	Spouse	true
04/19/2002	April	Bosell	Child	true
01/01/2005	Nino	Cliente	Child	true
01/01/2007	Child	Cliente	Child	true

**Family Enrollments**

Begin Date	End Date	Program Name	Status	Status1
09/22/2015	12/31/9999	1 English for Employment	20	Assessments Pending

**Family Services**

Begin Date	Family Name	Service Recorded On	Service
10/02/2015	Cliente,Nuevo-1949-01-01	Cliente, Nuevo	AA Meeting

Click the icon for Case Notes. The Family Case Notes form displays all existing family case notes.

**Family Case Notes**

+ Add New   Add New (Advanced)   Impersonation

Print Selected

Type

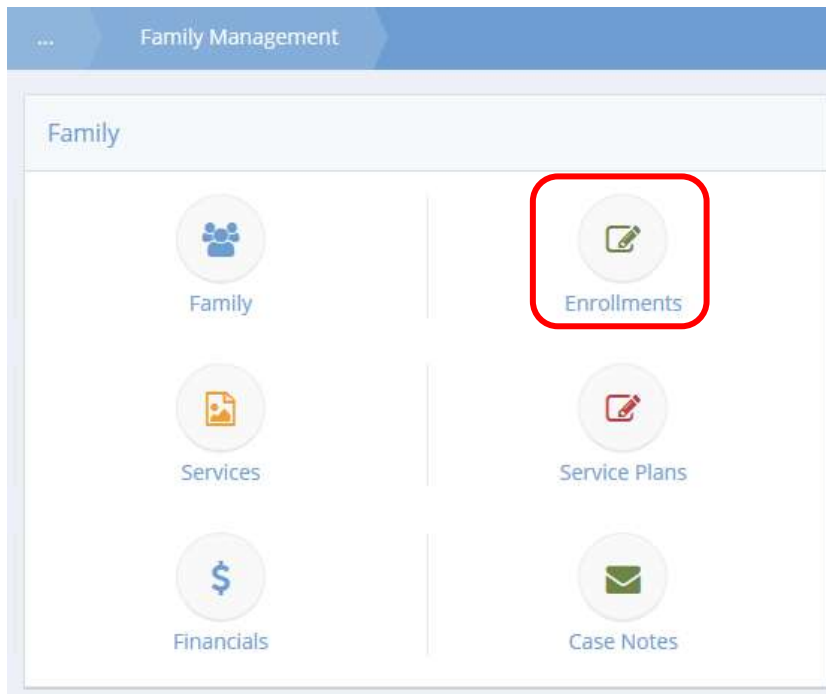
Total Rows: 3

Preview	Created Date	Case Note Summary	Type	Status	Family or Individual
<input checked="" type="checkbox"/>	10/8/2015 12:40 PM	Case Note 3	Case Note		Family
<input checked="" type="checkbox"/>	10/8/2015 12:40 PM	Case Note 2	Case Note	Pending	Family
<input checked="" type="checkbox"/>	10/8/2015 12:40 PM	Case Note 1		Pending	Family

## 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.

Status	Program   Assigned Case Mgr	Program Entry - Exit	CM Assign. Dates	Details	Elig. Rules	Family	Program ID	Enroll ID
Assessments Pending	1 English for Employment	9/22/2015 - Present		<a href="#">Details</a>		Cliente.Nuevo-1949-01-01	94	15134

To add a new enrollment, click the [+ Add New](#) button.

The Add/Edit Enrollment form displays.

The screenshot shows the 'Add/Edit Enrollment' form. The 'Family Name' field contains 'Cliente.Nuevo-1949-01-01'. The 'Enrollment Entry Date' is '09/23/2015'. The 'Enrollment Exit Date' is 'Open'. The 'Program' field is highlighted with a red box. The 'Provider' is 'CaseWorthy'. The 'Family On Individual' field is empty. The 'Schedule Follow Up' checkbox is checked. The 'Restriction Information' section at the bottom shows 'Restriction' set to 'Shared'.

Select a program from the drop-down list and edit any other fields as desired for the enrollment. Click  Save 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.

A screenshot of the 'Family Service Plan Summary' table. The table has a blue header with the text 'Family Service Plan Summary'. Below the header, there is a section titled 'Total Rows: 1'. The table contains one row of data with the following columns: Plan Begin - End Dates, Description, Enrolled Program, Ind or Family, Case Manager, % Compl, # of Goals, and # of Steps.

Plan Begin - End Dates	Description	Enrolled Program	Ind or Family	Case Manager	% Compl	# of Goals	# of Steps
9/23/2015 - 9/30/2015	Service Support Plan	1 English for Employment	Family	Elason, Adrian		0	0

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.

Search Client By S-CM-CN

Program, Service, Case Manager and Client Selection Criterion Options

Type \* [dropdown]  
Program [dropdown]

Client Specific Search Criterion

Created Date: 07/07/2015 through 07/07/2015  
Ethnicity [dropdown]  
Gender [dropdown]  
Veteran Status [dropdown]  
Birth Day Month [dropdown]

Search

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.

Search Client By S-CM-CN

Program, Service, Case Manager and Client Selection Criterion Options

Type #:

Program:

Service:

Client Specific Search Criterion

Created Date:  through

Ethnicity:

Gender:

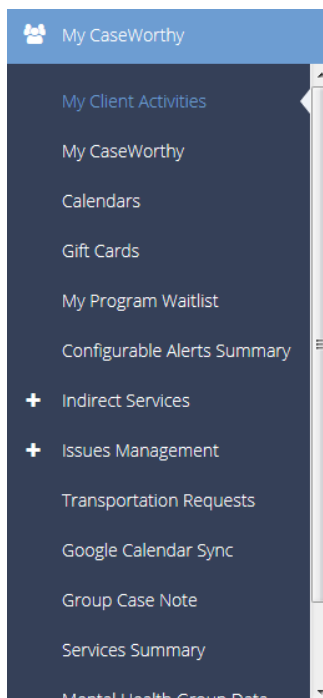
Veteran Status:

Birth Day Month:

Total Rows: 9

First Name	Last Name	Program	Service Billing Extension	Case Note Type	DOB	Ethnicity	Gender	Veteran Status	Birth Day Month	Race	EntityID
Jane1111	Test	12 Permanent Housing for Homeless Disabled	No		5/1/1984	Client Doesn't Know	Female	No	May		2448
Jane122	Test	12 Permanent Housing for Homeless Disabled	No		8/1/1988	Client Doesn't Know	Male	No	August		2615
Jane122	Test	12 Permanent Housing for Homeless Disabled	No		8/1/1988	Client Doesn't Know	Male	No	August		2615
Jane150	Test	12 Permanent Housing for Homeless Disabled	No		2/1/1990	Client Doesn't Know	Male	No	February		3415
Maria	Cliente	12 Permanent Housing for Homeless Disabled	No		5/2/1949	Hispanic or Latino	Female	No	May		8145
Nuevo	Cliente	12 Permanent Housing for Homeless Disabled	No		4/1/1949	Data Not Collected	Male	No	April		9634
Shaun	Page	12 Permanent Housing for Homeless Disabled	No		2/7/1972	Hispanic or Latino	Male	No	February		3719
Wally	Unger	12 Permanent Housing for Homeless Disabled	No		11/3/1994	Client Doesn't Know	Male	No	November		3408

## My Client Activities

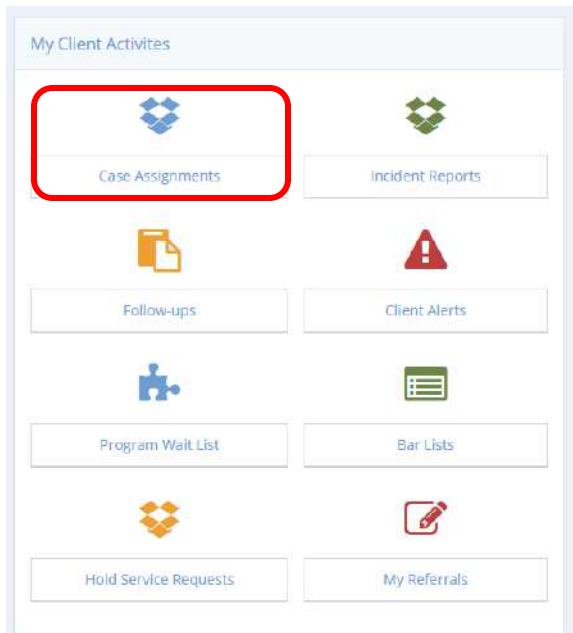


The first menu item in the My CaseWorthy menu group is the "My Client Activities" dashboard. Here, a user can access various information related to the clients to whom they are assigned as a case manager.



## My Client Activities

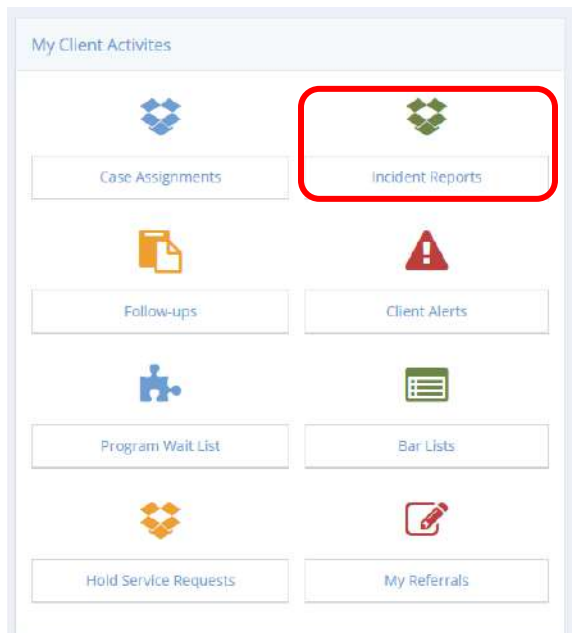
### Case Assignments



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.


Program <input type="text"/>			
Total Rows: 3 <span>Search</span>			
Case Begin - End Date	First Name	Last Name	Program Name
3/9/2015 - Present	Steve	Bosell	<a href="#">2 YAGA</a>
3/9/2015 - Present	Steve	Bosell	<a href="#">Budgets Program</a>
3/9/2015 - Present	Steve	Bosell	<a href="#">Catholic Charities All in One</a>

## Incident Reports



Click the icon for Incident Reports. The My Client Incident Participants form displays.

My Client Incident Participants					
Eliason, Adrian					
Severity: <input type="text"/> Status: <input type="text"/>					
Total Rows: 1 <span>Search</span>					
Date	Client Name	Incident Summary	Participation Type	Severity	Status
3/9/2015	Bosell, Steve	test	Aggressor	Low	Open


Click the action gear  icon for the desired entry and click Edit.

My Client Incident Participants					
Eliason, Adrian					
Severity: <input type="text"/> Status: <input type="text"/>					
Total Rows: 1 <span>Search</span>					
Date	Client Name	Incident Summary	Participation Type	Severity	Status
<div>  <span>Edit</span> </div>	Bosell, Steve	test	Aggressor	Low	Open




The Edit Incident Report form displays.

The screenshot shows the 'Edit Incident Report' form. The form is divided into several sections. On the left side, there are fields for 'Incident Date & Time' (06/30/2015, 01:13 p), 'User Recording Incident' (ackerson), 'Resource Location' (DV Housing), 'Incident Type' (Accident), 'Nature Of Incident', 'Record Outcome', and 'Incident Summary' (test). On the right side, there are fields for 'Status' (Open), 'Severity / Sensitivity #' (Low), 'Provider Name' (DV Shelter), 'Attach File' (with an 'Upload' button), 'Duration', and 'Schedule Follow-up'. At the bottom, there is a large text area for 'Incident Notes' with a rich text editor toolbar and a 'Words: 0' counter. A 'Save' button is located at the bottom right of the form.



Make any desired changes and click  Save when finished.


## Incident Report Follow-Up

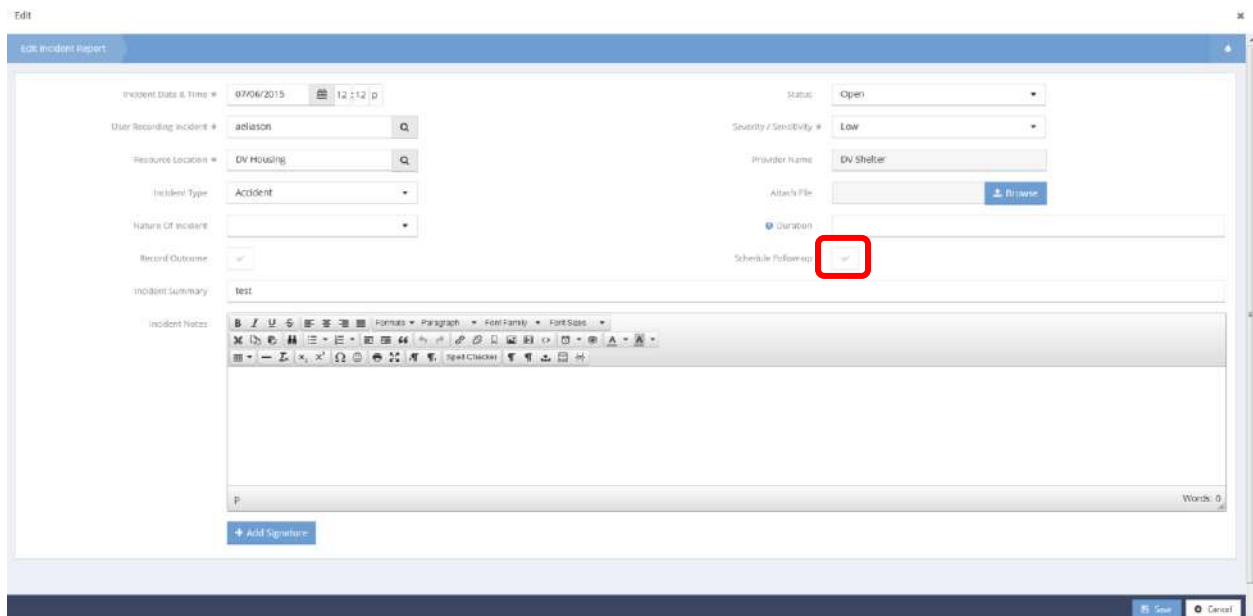
**Objective:** Create follow-ups for incident reports.

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.



Date	Client Name	Incident Summary	Participation Type	Severity	Status
	Cliente, Nuevo	an accident happened	Aggressor	Low	Open
 Edit	Boselli, Steve	test	Aggressor	Low	Open

The Edit Incident Report form displays. Click the checkbox icon  for Schedule Follow-up.



Incident Date & Time: 07/06/2015 12:12 p

User Recording incident: aelason

Resource Location: DV Housing

Incident Type: Accident

Nature of Incident:

Record Outcome:


Incident Summary: test

Incident Notes:

Status: Open

Severity / Sensitivity: Low


Provider Name: DV Shelter



Attach File: 

Duration:

Schedule Follow-up: ☒

Words: 0



The Add Employment Followup form displays.



Schedule Follow-up

Add Employment Followup

Type: Incident Report

Status: Open

Target Schedule Date: 02/06/2015

End Date:

Assigned Team: 🔍

Team Member:

Click the magnifying glass  lookup icon for Assigned Team.

The Select Team Lookup form displays.

Select Team Lookup

Select Teams

Team Name:

Total Rows: 49

Team Name	# of Members	Group Type
Absence Approval Team	5	Approvers
Approval1	22	Approvers
Approval2	12	Approvers
Approval3	5	Approvers
Case Mngr	3	Case Manager
CM Supervisor	5	Approvers
DD - Admin	3	Inspectors
DD - Fiscal	3	Approvers
Development	9	Issues Management
Employment	9	Employment
ENR - Test Team	2	Managers

Search

Done

Select the desired team from the list. Use the search bar to filter team names if desired.

Schedule Follow-up

Add Employment Followup

Type: Incident Report

Status: Open

Target Schedule Date: 02/06/2015

End Date:

Assigned Team: Quality Assurance

Team Member:

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.

Edit

Edit Incident Report

Incident Date & Time: 07/06/2015 12:12 p

User Reporting Incident: ackason

Resource Location: DV Housing

Incident Type: Accident

Nature Of Incident:

Record Outcome: n

Incident Summary: test

Incident Notes:

Status: Open

Severity / Sensitivity: Low

Provider Name: DV Shelter

Attach File: [Browse](#)

Duration:

Schedule Follow up: ☒ edit

[Add Signature](#)

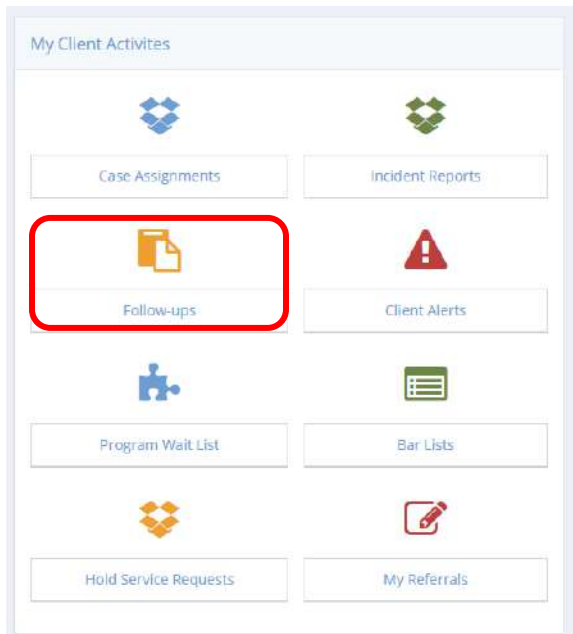
Words: 0

[Save](#) [Cancel](#)

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.

My Assigned Followups				
Elexson, Adrian				
Status: <input type="text"/>				
Total Rows: 2				
Type	FollowUp.UserID	Begin Date	Client	Status
<input checked="" type="checkbox"/> Enrollment Member	9632	4/8/2015 - Present	Bosell, Steve	Open
<input checked="" type="checkbox"/> Enrollment Member	9632	4/8/2015 - Present	Bosell, Steve	Scheduled

Select the desired follow-up task by clicking on the checkbox ☒ to the left of the follow-up line.

My Assigned Followups | Elason, Adrian | + Add New

Status:

Total Rows: 2 | Search

Type	FollowUp.UserID	Begin Date	Client	Status
<input checked="" type="checkbox"/> Enrollment Member	9632		Bosell, Steve	Open
Follow-up Type: Schedule Follow Up				
<input checked="" type="checkbox"/> Enrollment Member	9632	4/8/2015 - Present	Bosell, Steve	Scheduled

The follow-up expands to allow editing.

My Assigned Followups | Elason, Adrian | + Add New

Status:

Total Rows: 2 | Search

Type	FollowUp.UserID	Begin Date	Client	Status
<input checked="" type="checkbox"/> Enrollment Member	9632		Bosell, Steve	Open
Follow-up Type: Schedule Follow Up				
<input checked="" type="checkbox"/> Enrollment Member	9632	4/8/2015 - Present	Bosell, Steve	Open

Dropdown menu options: -Nothing-, Open, Complete, Scheduled

As desired, select from the drop-down lists for Status and Follow-up Type.


My Assigned Followups | Elason, Adrian | + Add New

Status:

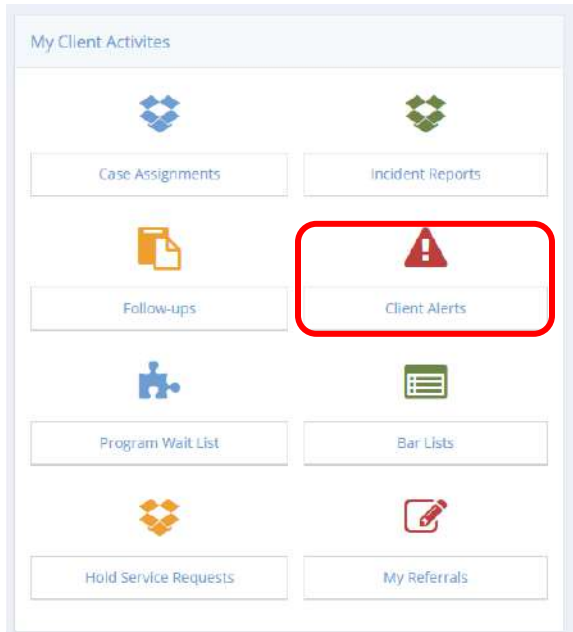
Total Rows: 2 | Search

Type	FollowUp.UserID	Begin Date	Client	Status
<input checked="" type="checkbox"/> Enrollment Member	9632		Bosell, Steve	Open
Follow-up Type: Schedule Follow Up				
<input checked="" type="checkbox"/> Enrollment Member	9632	4/8/2015 - Present	Bosell, Steve	Scheduled


Dropdown menu options for Follow-up Type: -Nothing-, Housing Retention, Employment Retention, Schedule Follow Up, Housing Inspection, Service Plan Review, Incident Report

Make any other changes desired and click the  Save button. Select 'Follow-ups' from the menu again to see any changes in the table listing.

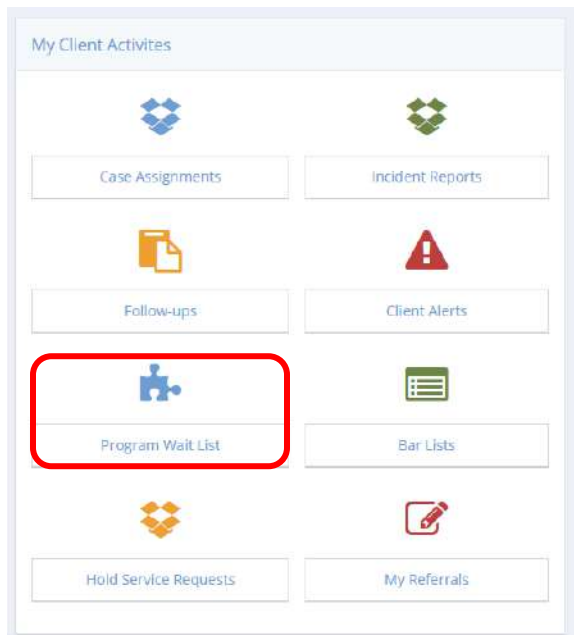
### *Client Alerts*



Clicking the "Client Alerts" icon opens the client alerts summary form. This form displays alerts associated with all of a case manager's clients.

My Client Alert Summary				
Total Rows: 1				
Created Date	Last Name, First	Summary	Severity	Status
 3/5/2015 8:04:00 AM	Bosell, Steve	summary	Critical	Open

## Program Wait List

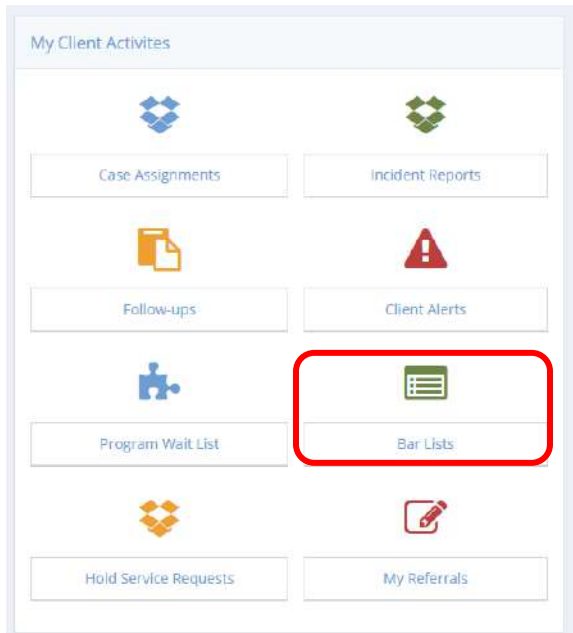


Clicking the "Program Wait List" opens the program waitlist summary form. This form displays all of a case manager's clients who have been placed on a wait list, along with the respective waitlist they are on. The list can be sorted by status, if needed.

The screenshot shows the "Client Side My Program Wait List Summary" form. It includes a search bar, a status filter dropdown (set to "Open"), and a table of results. The table has five columns: Client Name, Program, Status, Dequeue Date, and Deleted Date. There is one row of data.

Client Name	Program	Status	Dequeue Date	Deleted Date
Cliente, Nuevo	Isample prog (HIV)	Open	Present	Present

## Bar List

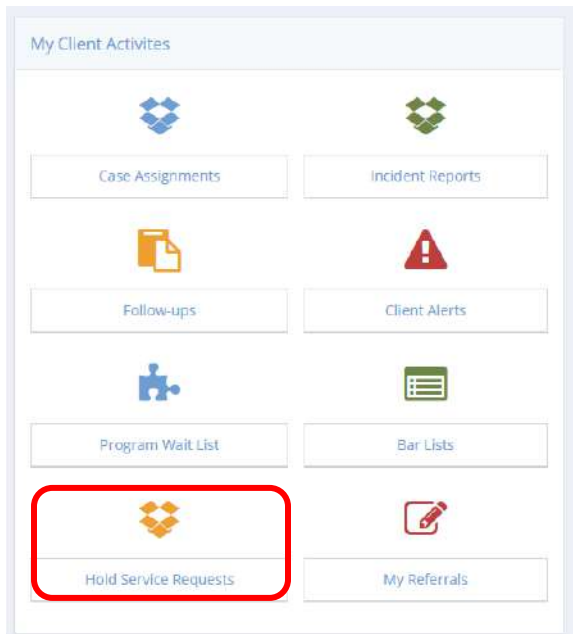


Clicking the "Bar List" icon opens the bar list summary form. This form displays all of a case manager's clients who have been barred from a program or service.

My Bar Services and Programs				
Ellison, Adrian				
Total Rows: 2				
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 - Aggressor/Provoker

## Hold Service Requests

Click on the Hold Service Requests icon in the My Client Activities window.



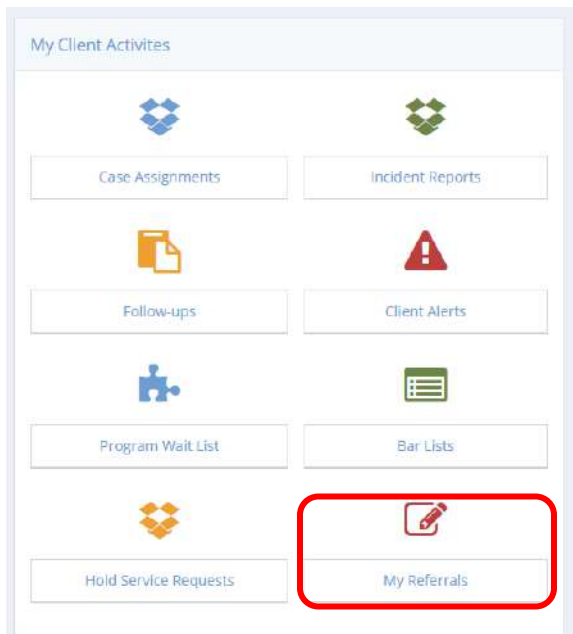
The Hold Service Requests form displays a list of service requests on hold.

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
Alko, 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
Ardens, 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	fyh uyjlsyfu	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.

Referral Out by Me    Eliason, Adrian

Please Note - You can't edit an Accepted/Approved Referral.

UserEntity.EntityName:

Referral Status:

Total Rows: 8    Search

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.





Referral Out by Me: Elason, Adrian

Please Note - You can't edit an Accepted/Approved Referral.

UserEntity.EntityName:

Referral Status:

Total Rows: 8 Search

Client	Referral Date	Provider Name, Address, City	Service	Case Note	Voucher	UserEntity.EntityName	Referral Status
 Edit	5/2015	Banner Health, 1441 North 12th Street, PHOENIX	AA Meeting			Elason, Adrian	Referred
 Referral Report	5/2015	Provider B, 123 Sunnyside Road B, SCHENECTADY	AA Meeting			Elason, Adrian	Referred
 Delete	5/2015	Banner Health, 1441 North 12th Street, PHOENIX	AA Meeting			Elason, Adrian	Referred
Bosell, Steve	1/26/2015	Head Start...	AA Meeting			Elason, Adrian	Referred

The Edit Provider Referral form displays.

Edit Provider Referral

Service: AA Meeting

Referral Status: Referred

Referral Outcome: Unknown

Refer To UserID:

Provider Information

Provider: Provider B

Address: 123 Sunnyside Road B

City: SCHENECTADY

State: NY


Phone: 222-222-2222


Email: providerB@ecm.ecm

Voucher Information


Voucher Provided? ☐

Case Note and Restriction Options

Case Note:  Case Note

Create Email:  Create Email

Restriction: Shared

Make any desired changes and click on the  Save button.

To create a referral report, select Referral Report from the pop-up menu.




Referral Out by Me    Eliason, Adrian

Please Note - You can't edit an Accepted/Approved Referral.

UserEntity.EntityName:

Referral Status:

Total Rows: 8


	Referral Date	Provider Name, Address, City	Service	Case Note	Voucher	UserEntity.EntityName	Referral Status
 Referral Report	1/26/2015	Banner Health, 1441 North 12th Street, PHOENIX	AA Meeting			Eliason, Adrian	Referred
 Delete	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

The Referral Report opens in a new window.

1 of 1 Find | Next

## Referral Report

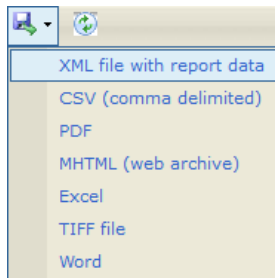
Report Period: 4/9/2015



<b>Referring Provider:</b> CaseWorthy	<b>Refer to Provider:</b> Banner Health
<b>Address:</b> 740 East 3900 South Salt Lake City, UT 84107	<b>Address:</b> 1441 North 12th Street PHOENIX, AZ 85006
<b>Phone:</b> 801-888-9999	<b>Phone:</b> 345-345-3453
<b>E-Mail:</b>	<b>E-Mail:</b> <a href="mailto:Email@Email.com">Email@Email.com</a>

A Referral was made to Banner Health on 1/26/2015 8:55:00 AM to assist Steve Bosell with AA Meeting.

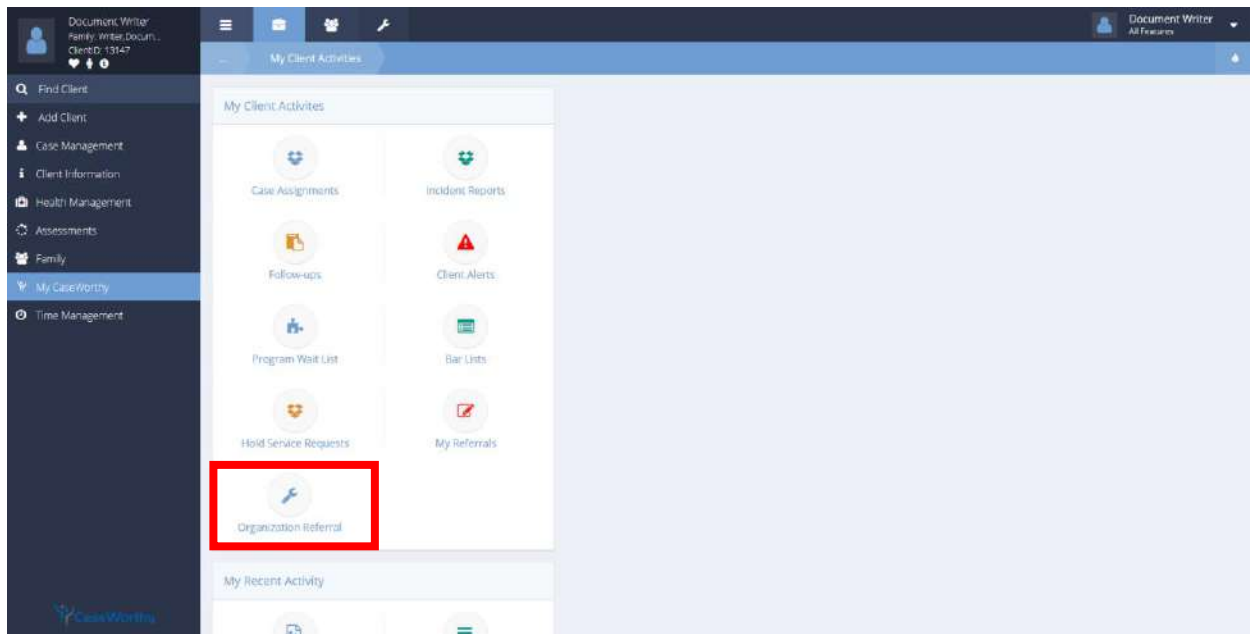
The report can be exported in various formats.



## 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.

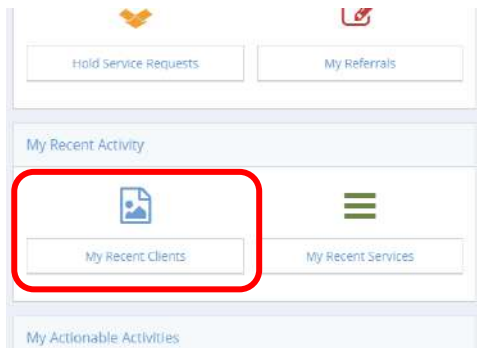
Referral Out by Me Case Manager							
Please Note - You can't edit an Accepted/Approved Referral.							
Referral Status: <input type="text"/>							
Total Rows: 729 <span>Search</span>							
Referral Date	Client	Provider Name, Address, City	Service	Case Note	Voucher	Referral Status	
7/18/2016	Test_2, Brandon	CaseWorthy (Real), 740 East 3900 South, Salt Lake City	Groceries		Referred		
6/17/2016	Wrapp, Mitch	CaseWorthy, 740 East 3900 South, Salt Lake City, UT	Employment Services		Referred		
6/9/2016	Maples, Marla	Catholic Charities, 123 South Main Street, Salt Lake City	Adult Counseling Service		Referred		
6/9/2016	Brown, Henrietta	CaseWorthy, 740 East 3900 South, Salt Lake City, UT	Referral In		Referred		
6/2/2016	Test, Eric	CaseWorthy, 740 East 3900 South, Salt Lake City, UT	Dental Exam		Referred		

Existing 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.

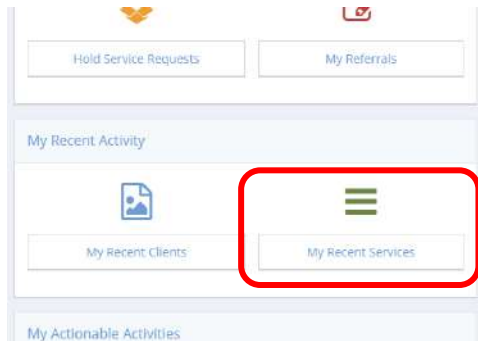
Created Date	Name	Birth Date	Gender	Last Modified User	Last Modified Date	Entity.EntityName
--------------	------	------------	--------	--------------------	--------------------	-------------------

Select a date range and click the  Search button. Recently created clients display in the spreadsheet below.

Created Date	Name	Birth Date	Gender	Created By User	Last Modified User	Last Modified Date
2/20/2015 10:51 AM	Hutchins, Roy	2/2/2015	Male	Ellason, Adrian	Ellason, Adrian	2/20/2015 10:51 AM


## 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.




A screenshot of the 'My Recorded Services' summary form. At the top, there is a blue header bar with the title 'My Recorded Services'. Below the header, there is a 'Date Range Filter' section with two date pickers showing '10/18/2014' and '12/17/2014'. Below the date range filter, there is a blue bar with the text 'Total Rows: 0' and a 'Search' button with a magnifying glass icon. Below the search bar, there is a table with the following columns: Date, Client, Program, Service, Units, Unit Value, Total, and Service ID. The table is currently empty.


Select a date range and click the  button.

Services displays in the space below the search bar.

My Recorded Services							
Date Range Filter: 11/03/2014 to 01/02/2015							
Total Rows: 6							
Date	Client	Program	Service	Units	Unit Value	Total	Service ID
12/19/2014	Clients, Nuevo		Employment Skills Training	1.00	1.00	1.00	1211065
12/15/2014	Bosell, Steve		Case Management	1.00	0.00	0.00	1210955
12/15/2014	Bosell, Steve		Case Management	1.00	0.00	0.00	1210954
12/15/2014	Bosell, Steve		Case Management	1.00	0.00	0.00	1210953
12/8/2014	Arden, Cam		Child Care Assistance	1.00	1.00	10.00	1210766
11/25/2014	Clients, Nuevo		AA Meeting	1.00	1.00	1.00	1210489
						Total: \$12.00	

To edit a service, click the action gear  icon associated with it and select Edit Service.

My Recorded Services							
Date Range Filter: 11/03/2014 to 01/02/2015							
Total Rows: 6							
Date	Client	Program	Service	Units	Unit Value	Total	Service ID
 Edit Service	Clients, Nuevo		Employment Skills Training	1.00	1.00	1.00	1211065
 View Account Transaction	Steve		Case Management	1.00	0.00	0.00	1210955
 Delete	Steve		Case Management	1.00	0.00	0.00	1210954
12/15/2014	Bosell, Steve		Case Management	1.00	0.00	0.00	1210953
12/8/2014	Arden, Cam		Child Care Assistance	1.00	1.00	10.00	1210766
11/25/2014	Clients, Nuevo		AA Meeting	1.00	1.00	1.00	1210489
						Total: \$12.00	

The Add/Edit Service form displays. Make any changes and click the  Save button.

Begin Date	12/15/2014	End Date	12/15/2014
Service	Case Management	Program	
Account		Method Of Contact	
Service Units and Amount			
Unit Of Measure	Hours	Quantity	1.00
Unit Value	0.00	Unit Total	0
Paid to Date	0.00	Restriction	Shared
Service Accounting			
Obligation Date		Amount Paid	0.00
Obligation Amount	0.00	Remaining	0.00



The My Recorded Services form displays again with the new record in the list.

My Recorded Services

Date Range Filter: 11/03/2014 to 01/02/2015

Total Rows: 6

Date	Client	Program	Service	Units	Unit Value	Total	Service ID
Edit Service	S. Nuevo		Employment Skills Training	1.00	1.00	1.00	1211065
<b>View Account Transaction</b>	Steve		Case Management	1.00	0.00	0.00	1210955
Delete	Steve		Case Management	1.00	0.00	0.00	1210954
12/15/2014	Boseil, Steve		Case Management	1.00	0.00	0.00	1210953
12/8/2014	Arden, Cam		Child Care Assistance	1.00	1.00	10.00	1210766
11/25/2014	Cliento, Nuevo		AA Meeting	1.00	1.00	1.00	1210489
						<b>Total: \$12.00</b>	

To view a transaction, click the action gear icon associated with it and select View Account Transaction. The View Transaction History form displays.

View Transaction History

Service	Service Date	Transaction Type	Transaction Date	Service Total	Paid Total	Paid Amount

Click Done when finished viewing. The My Recorded Services form displays again.

My Recorded Services

Date Range Filter: 11/03/2014 to 01/02/2015

Total Rows: 6

Date	Client	Program	Service	Units	Unit Value	Total	Service ID
Edit Service	S. Nuevo		Employment Skills Training	1.00	1.00	1.00	1211065
View Account Transaction	Steve		Case Management	1.00	0.00	0.00	1210955
<b>Delete</b>	Steve		Case Management	1.00	0.00	0.00	1210954
12/15/2014	Boseil, Steve		Case Management	1.00	0.00	0.00	1210953
12/8/2014	Arden, Cam		Child Care Assistance	1.00	1.00	10.00	1210766
11/25/2014	Cliento, Nuevo		AA Meeting	1.00	1.00	1.00	1210489
						<b>Total: \$12.00</b>	

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

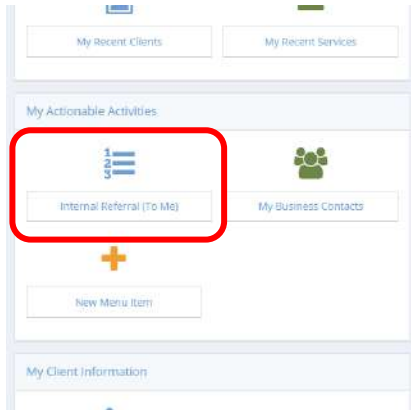
Confirmation Dialog

Are you sure want to delete?

## 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.

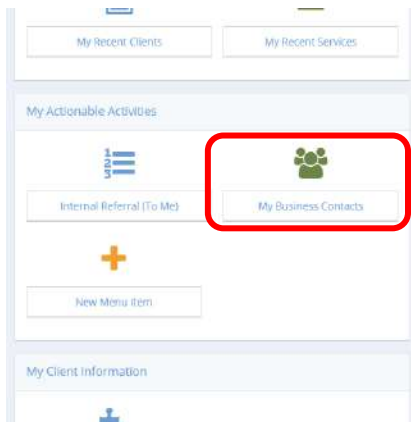
Client Referrals					
Please Note - You can't edit an Accepted/Approved Referral.					
Referral Date	Client Name	Service	Provider Referral Type	Refer to User	Case Note
12/16/2014 12:00 AM	Jane, Jane205	Case Management	Referral - Internal		
12/15/2014 12:00 AM	Boselli, Steve	Case Management	Referral - Internal	Elason, Adrian	<a href="#">Q</a>
12/15/2014 12:00 AM	Boselli, Steve	Case Management	Referral - Internal	Elason, Adrian	
12/15/2014 12:00 AM	Boselli, Steve	Case Management	Referral - Internal	Elason, Adrian	<a href="#">Q</a>

Click the **+ Add New** button. The Internal Referrals Input form displays. Enter all necessary info and click **Save** when finished.

Referral Date *		12/18/2014	
Service		<input type="text"/>	
Refer to Person		<input type="text"/>	
Case Note			
Case Note:		<a href="#">Case Note</a>	
To email the provider this referral, select the email option below.			
Email Provider		<a href="#">Create Email</a>	

## 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.

Entity Assignments Summary							Manage Categories	+ Add New	
Begin Date	End Date	User Name	Provider Name	Relationship	Provider Phone	View Provider Contacts			
12/12/2014	Present	Adrian	456yujik	Business Developer					

To add a new provider, click the **+ Add New** button. The Business Contacts Assignments form displays.

Business Contacts Assignments

Category


Choose Options...

Total Rows: 355

	Provider ID	Provider Name	City	Begin Date *	End Date *	Assignment Relationship *	
<input type="checkbox"/>	7148	456yujik					
<input checked="" type="checkbox"/>	161	45rtyhj					
<input checked="" type="checkbox"/>	2166	4r 876yt					
<input checked="" type="checkbox"/>	9711	Adrian's Bistro					
<input checked="" type="checkbox"/>	9712	Adrian's Bistro					
<input checked="" type="checkbox"/>	2099	Agri Based					
<input checked="" type="checkbox"/>	128	Appalachian Regional Coalition on Homelessness	Salt Lake City, UT				
<input checked="" type="checkbox"/>	4029	Apple Computers - Real	NEW YORK, NY				

Click the clear checkbox ☐ and enter a begin date, end date, and relationship. Click on the **Save** button. The Entity Assignments Summary form displays.

Entity Assignments Summary						
Begin Date	End Date	User Name	Provider Name	Relationship	Provider Phone	View Provider Contacts
12/12/2014	Present	Adrian	456yujlk	Business Developer		

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


Entity Assignments Summary						
Begin Date	End Date	User Name	Provider Name	Relationship	Provider Phone	View Provider Contacts
12/12/2014	Present	Adrian	456yujlk	Business Developer		
	Present	Adrian	CaseWorthy	Business Developer	801-858-9999	

The Entity Assignment Edit form displays.

Entity Assignment Edit	
Assignment Dates	
Begin Date	12/12/2014
End Date	Present
Relationship	Choose Options... Business Developer
Relationship Parties	
Relationship By Name	Eliason, Adrian
Relationship To Name	456yujlk
Save  Cancel	

Make any changes and click the  Save button. The Entity Assignments Summary form displays again.

Entity Assignments Summary							Manage Categories	Add New
	Begin Date	End Date	User Name	Provider Name	Relationship	Provider Phone	View Provider Contacts	
	12/12/2014	Present	Adrian	456yujk	Business Developer			
	1/6/2015	Present	Adrian	CaseWorthy	Business Developer	801-888-9999		

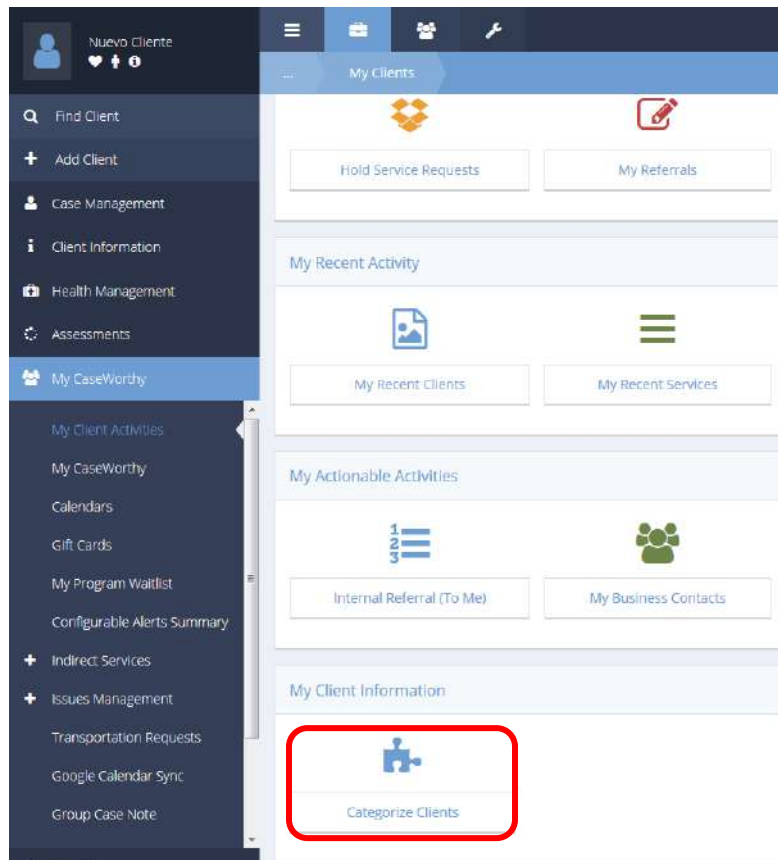
To view provider contacts, click the magnifying glass icon  under a provider. The View Provider Contacts form displays.

View Provider Contacts					
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	jjoe@myECM.net	6/25/2013	Present	Cell	
User, Approval, Approval2		12/5/2014	Present	Cell	
Test, Jane2	bulhui@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	
Test, Test13	TestTest.com	10/3/2012	Present	Cell	255-255-2556

## 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.


 A screenshot of the 'Categorize Clients' form. At the top right, a button with a plus sign and the text 'Add New' is highlighted with a red rectangle. Below this is a 'Category' dropdown menu. At the bottom of the form is a table with three columns: 'Client Name', 'Category', and 'Client ID'. The table is currently empty.

To add a new client to the list, click the **+ Add New** button. The Categorize Clients form displays.

The screenshot shows the 'Categorize Clients' form. It has three main sections: 'Client Name', 'Categories', and 'Client ID'. The 'Client Name' section has a text input field with a magnifying glass icon to its right, which is highlighted by a red square. The 'Categories' section has a dropdown menu labeled 'Choose Options...'. The 'Client ID' section has a text input field. There is an 'Add Row' button in the top right corner.


Click the magnifying glass  icon to look up a client by program. The Clients in Program form displays.

The screenshot shows the 'Clients in Program Lookup' form. It has a 'Program' dropdown menu and a 'Client Name' text input field. A 'Search' button with a magnifying glass icon is highlighted with a red square in the bottom right corner.

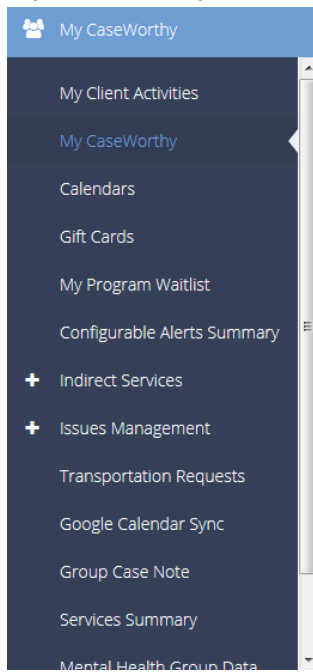
Select a program from the drop-down list, enter a name, and click  to see a list in the lower half of the form.

The screenshot shows the 'Clients in Program Lookup' form with the 'Program' dropdown set to 'Sample prog (HMO)'. Below the search bar, there is a table of clients. The 'Search' button is highlighted with a red square.

Client Name	Program Begin - End Dates	Enrollment ID
Wright, Mitch	1/2/2015 - Present	9970
Test, Jane120	12/10/2014 - Present	9838
Man, Bat	11/25/2014 - Present	9781
Morgan, Test	2/1/2011 - Present	2852
Bliss, Anne	3/11/2014 - Present	5644
Nickelson, Nick	12/12/2014 - Present	9858

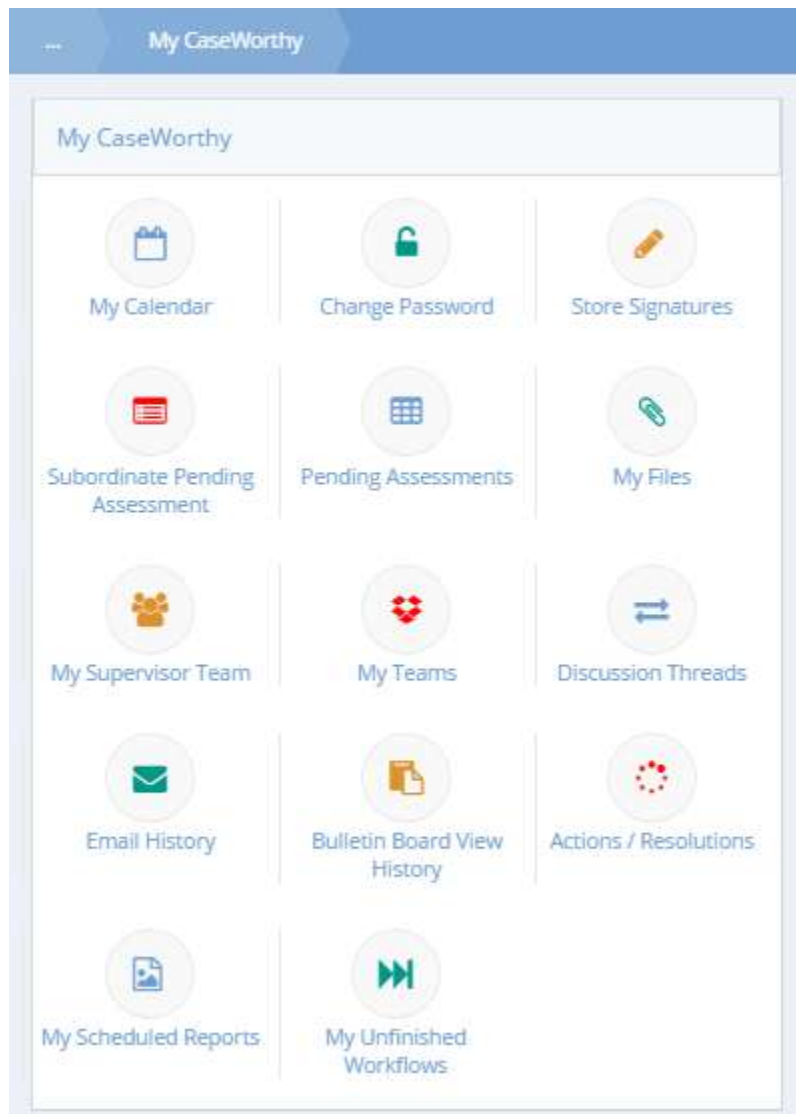
Click the client's name to add it. Click  when finished.

## My CaseWorthy

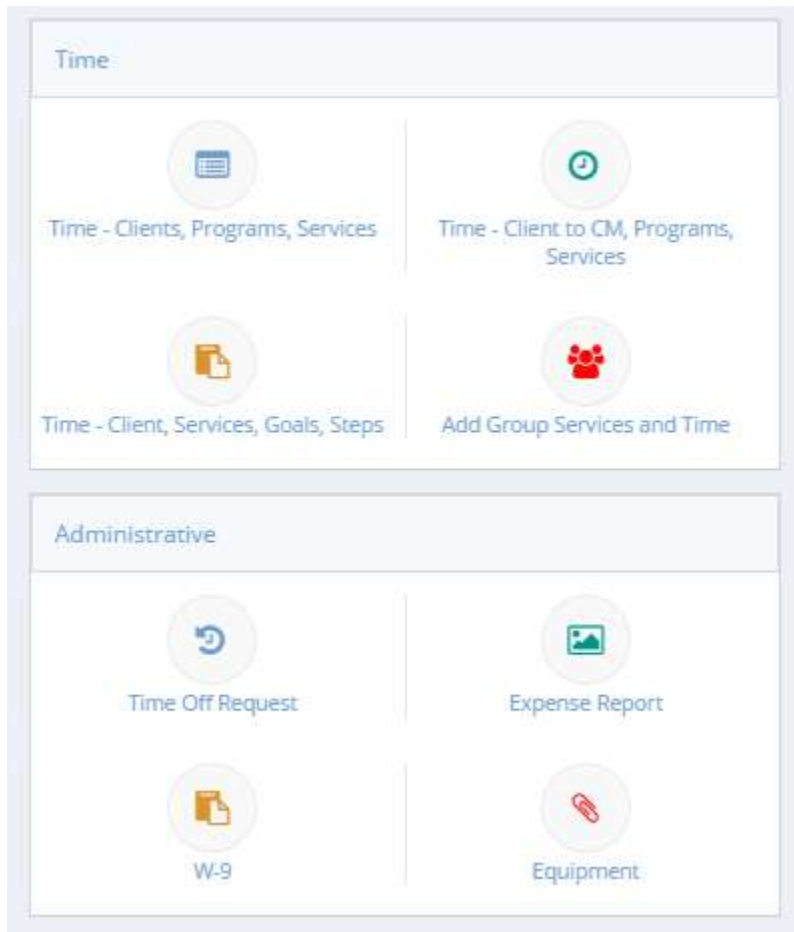


The next menu item in the My CaseWorthy menu group is the "My CaseWorthy" dashboard.





(Continued on next page)



## Goal Plan (Summary)

**Objective:** Edit, manage and delete goal plans and goal progress notes.


My CaseWorthy			
My Calendar	Change Password	Subordinate Pending Assessment	
Pending Assessments	My Files	My Supervisor Team	
My Teams	Discussion Threads	Email History	
Bulletin Board View History	Actions / Resolutions	My Scheduled Reports	
My Case Assignments			
Begin Date	EndDate	Program Name	Name
03/09/2015	12/31/9999	2 YAGA	Boselli, Steve
03/09/2015	12/31/9999	Budgets Program	Boselli, Steve
03/09/2015	12/31/9999	Catholic Charities: All in One	Boselli, Steve
03/09/2015	12/31/9999	1 English for Employment	Boselli, Steve
03/09/2015	12/31/9999	HH program	Boselli, Steve
02/09/2015 9:16 AM	12/31/9999	09 Head Start	Cliente, Nuevo
02/09/2015 9:16 AM	12/31/9999	09 Head Start	Cliente, Nuevo
02/09/2015 9:16 AM	12/31/9999	Child Day Care	Cliente, Nuevo
02/09/2015 9:16 AM	12/31/9999	09 Head Start	Boselli, Steve
02/09/2015 9:16 AM	12/31/9999	ICC Adoption	Cliente, Nuevo
MY Teams			
Team Name	Team Type	Begin Date	
Quality Assurance	Issues Management	08/22/2011	
Team Training Approval Group	Approvals	08/14/2013	

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.


Case Begin - End Date	First Name	Last Name	Program Name
3/9/2015 - Present	Steve	Bosell	2 YAGA
3/9/2015 - Present	Steve	Bosell	Budgets Program
3/9/2015 - Present	Steve	Bosell	Catholic Charities All in One
3/9/2015 - Present	Steve	Bosell	1 English for Employment
3/9/2015 - Present	Steve	Bosell	HH program

Click on the desired Program Name link. The Enrollments form displays.

Status	Program   Assigned Case Mgr	Begin - End Dates	Members
Assessments Pending	Budgets Program	3/9/2015 - Present	

Click on the  Search button.  
The relevant rows appear.

Status	Program   Assigned Case Mgr	Begin - End Dates	Members
Assessments Pending	Budgets Program	3/9/2015 - Present	

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

Status	Program   Assigned Case Mgr	Begin - End Dates	Members
Assessments Pending	Budgets Program	3/9/2015 - Present	

The Enrollment Service Plan Summary form displays.

Enrollment Service Plan Summary

Budgets Program


+ Add New

+ Add New Workflow

Total Rows: 1

Search

Plan Begin - End Dates	Description	Plan Type	Case Manager	Case Note	% Complete Method	% Complete	Plan ID	Member
<div>4/16/2015 - 4/29/2015</div>	<div>description</div>		aellason			0.00 %	1427	96

Click on the action gear  icon associated with the desired service plan. Select Service Plan Goals from the pop up menu that appears.

Enrollment Service Plan Summary

Budgets Program

+ Add New

+ Add New Workflow

Total

edit

Goals and Steps

Outcomes

Service Plan Goals with Time

Service Plan Report

Expanded Service Plan Report

Progress Notes


Service Plan History


Delete

Search

Description	Plan Type	Case Manager	Case Note	% Complete Method	% Complete	Plan ID	Member
description		aellason			0.00 %	1427	95

The Goal Plan Summary form displays.

Goal Plan Summary							
The following list represents Client Goals that are linked to a specific Service Plan.							
Total Rows: 1							
Goal Date	Goal Description	Responsible Party	Goal Target Date	Minutes Spent	Percent Complete	Progress Notes	Case Note
2/16/2015	GED Class	Both, Client and Staff	3/18/2015		0%		
				Total: 0.00			

Click on the  button associated with the desired goal. The Progress Notes Summary by Goal form displays.

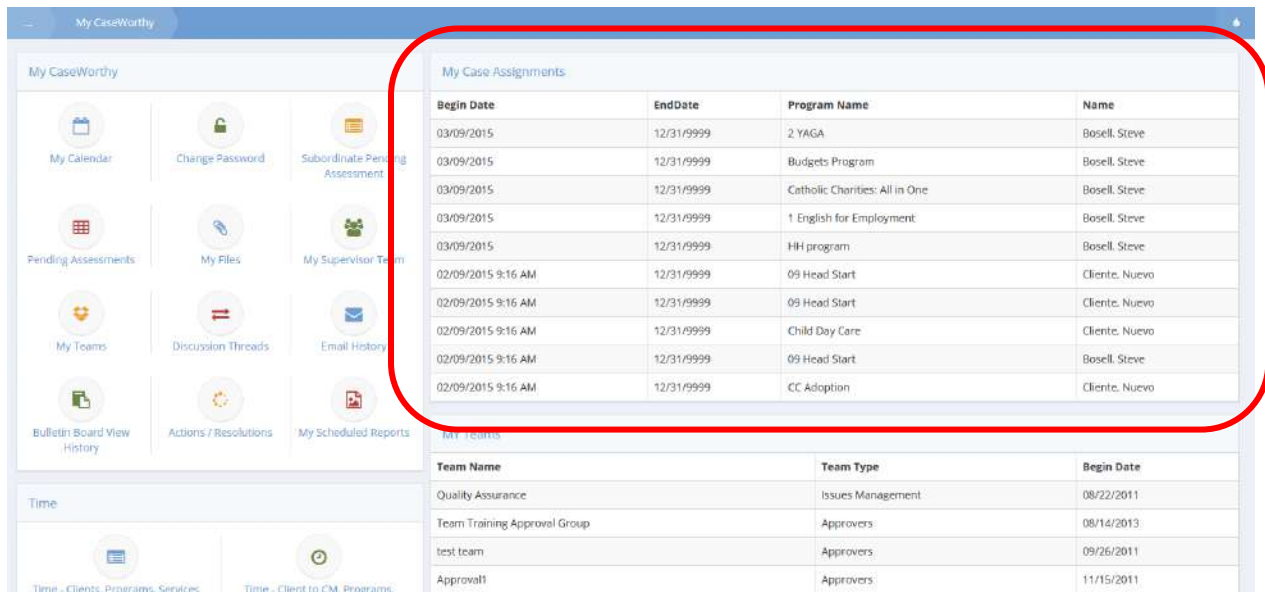
Progress Notes Summary by Goal					
 					
Total Rows: 1					
Preview	Goal Description	Goal Target Date	Case Note Summary	Case Note Reference Date	
	GED Class	3/18/2015	summary	4/16/2015	

Print, edit or delete progress notes from this form.

Progress Notes Summary by Goal					
 					
Total Rows: 1					
  	Goal Description	Goal Target Date	Case Note Summary	Case Note Reference Date	
	GED Class	3/18/2015	summary	4/16/2015	

## Goal Progress Notes Summary

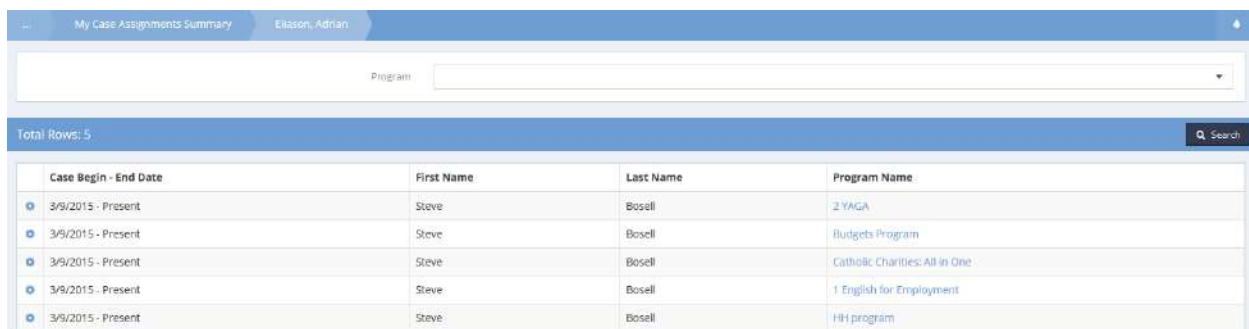
**Objective:** View, print, edit or delete goal progress notes.



The screenshot shows the My CaseWorthy dashboard. The 'My Case Assignments' table is highlighted with a red box. The table has the following data:

Begin Date	EndDate	Program Name	Name
03/09/2015	12/31/9999	2 YAGA	Bosell, Steve
03/09/2015	12/31/9999	Budgets Program	Bosell, Steve
03/09/2015	12/31/9999	Catholic Charities: All in One	Bosell, Steve
03/09/2015	12/31/9999	1 English for Employment	Bosell, Steve
03/09/2015	12/31/9999	HH program	Bosell, Steve
02/09/2015 9:16 AM	12/31/9999	09 Head Start	Cliente, Nuevo
02/09/2015 9:16 AM	12/31/9999	09 Head Start	Cliente, Nuevo
02/09/2015 9:16 AM	12/31/9999	Child Day Care	Cliente, Nuevo
02/09/2015 9:16 AM	12/31/9999	09 Head Start	Bosell, Steve
02/09/2015 9:16 AM	12/31/9999	CC Adoption	Cliente, Nuevo

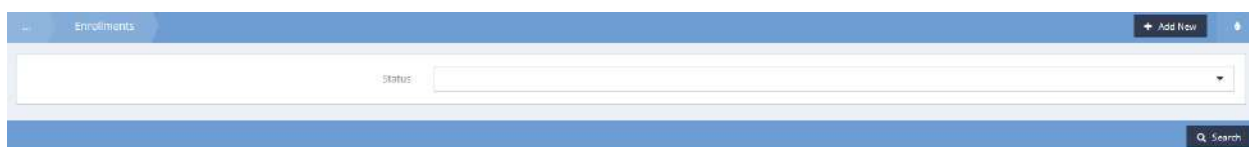
Click on the desired case assignment from the My Case Assignments query table on the My CaseWorthy dashboard. The My Case Assignments form displays.





The screenshot shows the 'My Case Assignments Summary' form for user 'Elkason, Adrian'. It includes a 'Program' dropdown menu and a table with 5 rows. The table has the following data:

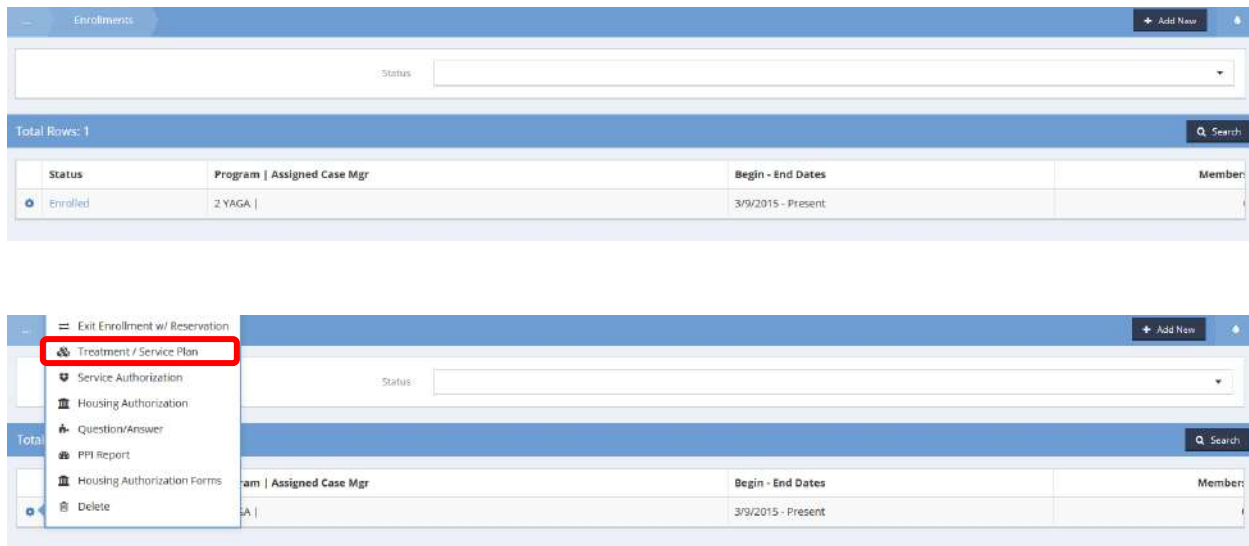
Case Begin - End Date	First Name	Last Name	Program Name
3/9/2015 - Present	Steve	Bosell	2 YAGA
3/9/2015 - Present	Steve	Bosell	Budgets Program
3/9/2015 - Present	Steve	Bosell	Catholic Charities: All in One
3/9/2015 - Present	Steve	Bosell	1 English for Employment
3/9/2015 - Present	Steve	Bosell	HH program

Click on the desired case assignment program name hyperlink. The Enrollments form displays.



The screenshot shows the 'Enrollments' form. It includes a 'Status' dropdown menu and a search bar.

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.



Enrollments

Status:

Total Rows: 1

Status	Program   Assigned Case Mgr	Begin - End Dates	Member
Enrolled	2 YAGA	3/9/2015 - Present	

Exit Enrollment w/ Reservation

**Treatment / Service Plan**

Service Authorization

Housing Authorization

Question/Answer

PPI Report

Housing Authorization Forms

Delete

The Enrollment Service Plan Summary form displays.




Enrollment Service Plan Summary

2 YAGA

Add New Add New Workflow

Total Rows: 1

Plan Begin - End Dates	Description	Plan Type	Case Manager	Case Note	% Complete Method	% Complete	Plan ID	Member
4/17/2015 - 4/29/2015	description		adlason			0.00 %	1431	95

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



Enrollment Service Plan Summary

2 YAGA

Add New Add New Workflow

Total

Edit

Goals and Steps

Outcomes

Service Plan Goals with Time

Service Plan Report

Exported Service Plan Report

**Progress Notes**

Service Plan History

Delete

Description	Plan Type	Case Manager	Case Note	% Complete Method	% Complete	Plan ID	Member
description		adlason			0.00 %	1431	95

The Goal Progress Notes Summary form displays.



Preview	Goal Description	Goal Target Date	Case Note Summary	Case Note Date
---------	------------------	------------------	-------------------	----------------

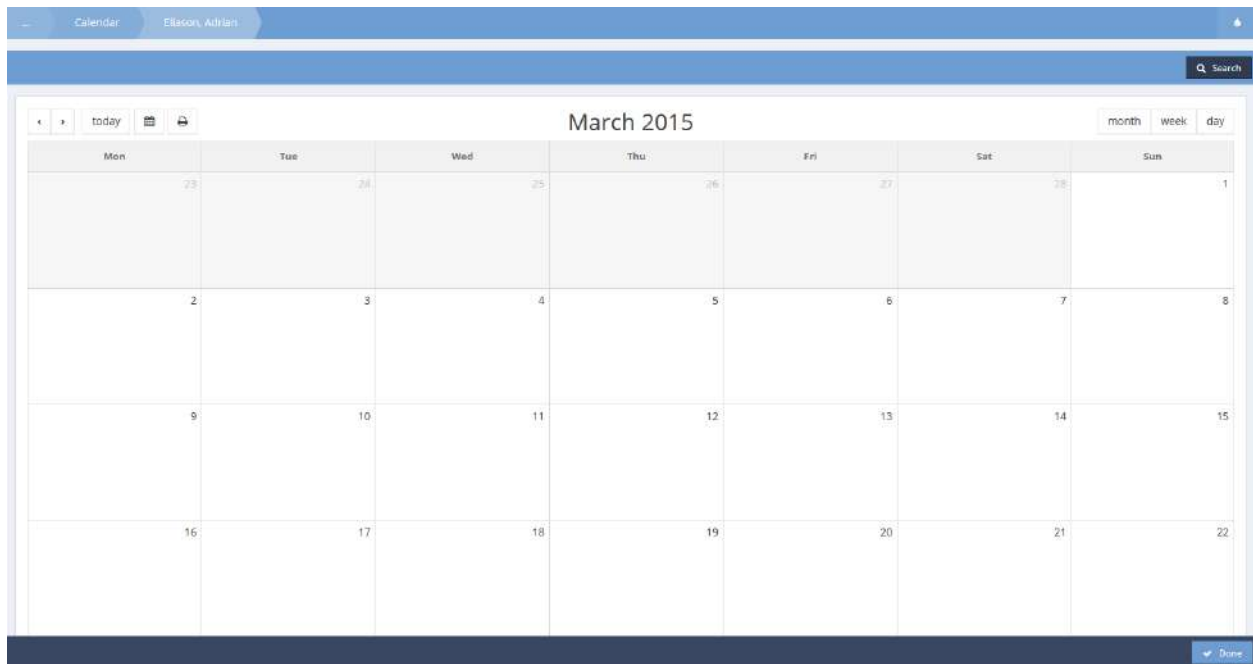
Print, edit or delete progress notes from this form.







## My Calendar



Click on the "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" [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.

Enter a new password between 6 and 20 characters long; include one capital letter, one number and one special character, i.e. !@!Q#5%&^

Logon Name *	aeliason	Password *	
		Confirm Password *	

## Stored Signatures

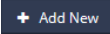
**Objective:** View and add signatures to be stored in the system for easy use on forms.

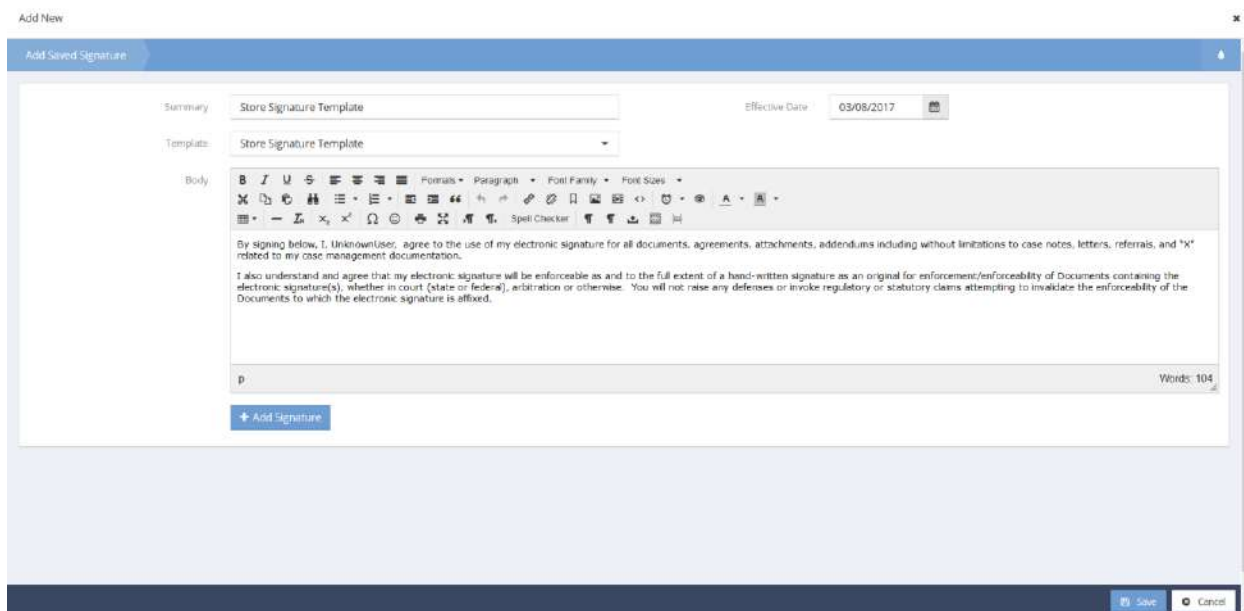
**Navigation:** Case Management>My CaseWorthy>My CaseWorthy>Store Signatures

The Stored Signatures form displays.



Name	Signature Type
Doc Writer	Case Manager

A list of all stored signatures displays. To add a new signature, click the  button. The Add Saved Signature form displays.



Add New

Add Saved Signature

Summary: Store Signature Template Effective Date: 03/08/2017

Template: Store Signature Template

Body


By signing below, I, UnknownUser, agree to the use of my electronic signature for all documents, agreements, attachments, addendums including without limitations to case notes, letters, referrals, and "X" related to my case management documentation.

I also understand and agree that my electronic signature will be enforceable as and to the full extent of a hand-written signature as an original for enforcement/enforceability of Documents containing the electronic signature(s), whether in court (state or federal), arbitration or otherwise. You will not raise any defenses or invoke regulatory or statutory claims attempting to invalidate the enforceability of the Documents to which the electronic signature is affixed.

Words: 104

+ Add Signature

Save Cancel

A disclaimer statement displays, notifying the user that they are agreeing to add their signature to the system. Click the  button to add the signature.

The signature pad displays. To store the signature, make sure to click the Store this Signature checkbox.

Your Name: \*  Role/Title: \*  ☐ Store this signature

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	<a href="#">Shelter Plus Care</a>	Assessments Pending
Cliente, Nuevo	1/29/2015	<a href="#">09 Head Start</a>	Assessments Pending
Cliente, Nuevo	1/29/2015	<a href="#">12 Permanent Housing for Homeless Disabled</a>	Assessments Pending

Click on the hyperlink for the desired assessment. The Enrollments Summary form displays.

Enrollments Summary			
Total Rows: 1			
Status	Program   Assigned Case Mgr	Begin - End Dates	Members
<a href="#">Assessments Pending</a>	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.

Program   Assigned Case Mgr	Begin - End Dates	Members
12 Permanent Housing for Homeless Disabled	1/29/2015 - Present	1

## My Files



Click the My Files icon. The View User File form displays a list of all files saved for the user.

...	View User Files	Test, QA	+ Add New	
Total Rows: 2				
	File Label	Created Date	Created By	
	Test file	1/19/2016	Test, QA	
	Test document	1/19/2016	Test, QA	

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.

...	View User Files	Test, QA	+ Add New	
Total Rows: 2				
	File Label	Created Date	Created By	
	View Image Delete	1/19/2016	Test, QA	
		1/19/2016	Test, QA	

To save a new file, click on the button. The Add User Files form displays.

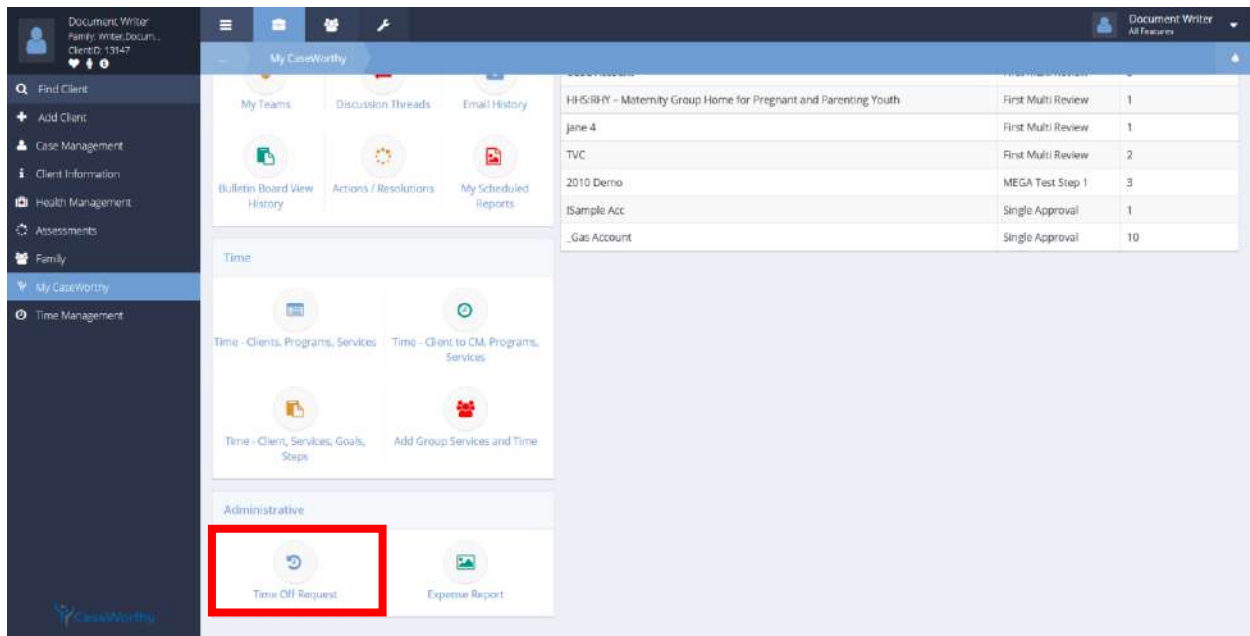
...	Add User Files	
Type *	<input type="text"/>	
Label	<input type="text"/>	
Upload File *	<input type="text"/>	
	<input type="text"/>	

Select the file type from the drop-down menu. Enter a label for the file. Click on the button and locate the file to be saved. Save the form. Click the 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.

Time Off Summary							
Total Rows: 1							
	Request Date	Begin Date	End Date	Type	Description	Status	Time Off ID
	7/21/2016	9/1/2016	9/13/2016	Jury Duty		Pending	23

Existing 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 screenshot shows the 'Time Off Request (Input)' form. The form is divided into two main sections. The top section contains fields for 'Request Date \*' (07/21/2016), 'Begin Date \*', 'End Date \*', 'Type \*' (a dropdown menu), 'Hours Requested Off \*', 'Description' (a text area), and 'Supervisor' (a text field). The bottom section, titled 'Approval and Comments', contains a 'Status \*' dropdown menu set to 'Pending' and an '+ Add Signature' button. At the bottom right of the form, there are 'Save' and 'Cancel' buttons. The 'Save' button is highlighted with a red rectangle.

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  Save 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

Begin Date	EndDate	Program Name	Name
05/05/2016	12/31/9999	HUD Test Project	Caputo, Marvel
05/05/2016	12/31/9999	CC Housing	Caputo, Marvel

Team Name	Team Type	Begin Date
Documentation	Approvers	05/04/2016
Doc Writer	Drug Testing	05/04/2016

Select My Supervisor Team from the My CaseWorthy portion of the My CaseWorthy dashboard.

The Subordinates – My Team Members form displays.

Subordinates - My Team Members			
Total Rows: 3			
Team Members	Last Name, First Name	Begin - End Dates	User ID
Dale	Seay, D.R.	5/4/2016 - Open	4361
UserTest	Test, User	5/4/2016 - Open	4104
crisis	Hotline, Crisis	5/4/2016 - Open	1465

Select the action gear icon associated with the desired team member and select Case Assignment from the menu options.

Subordinates - My Team Members

Total Rows: 3

Team Members	Last Name, First Name	Begin - End Dates	User ID
Calendar	Seay, D.R.	5/4/2016 - Open	4361
Case Assignment	Test, User	5/4/2016 - Open	4104
Pending Assessments	Hotline, Crisis	5/4/2016 - Open	1465

Done

The My Case Assignments Summary form displays.

My Case Assignments Summary Case Manager

Program

Total Rows: 2

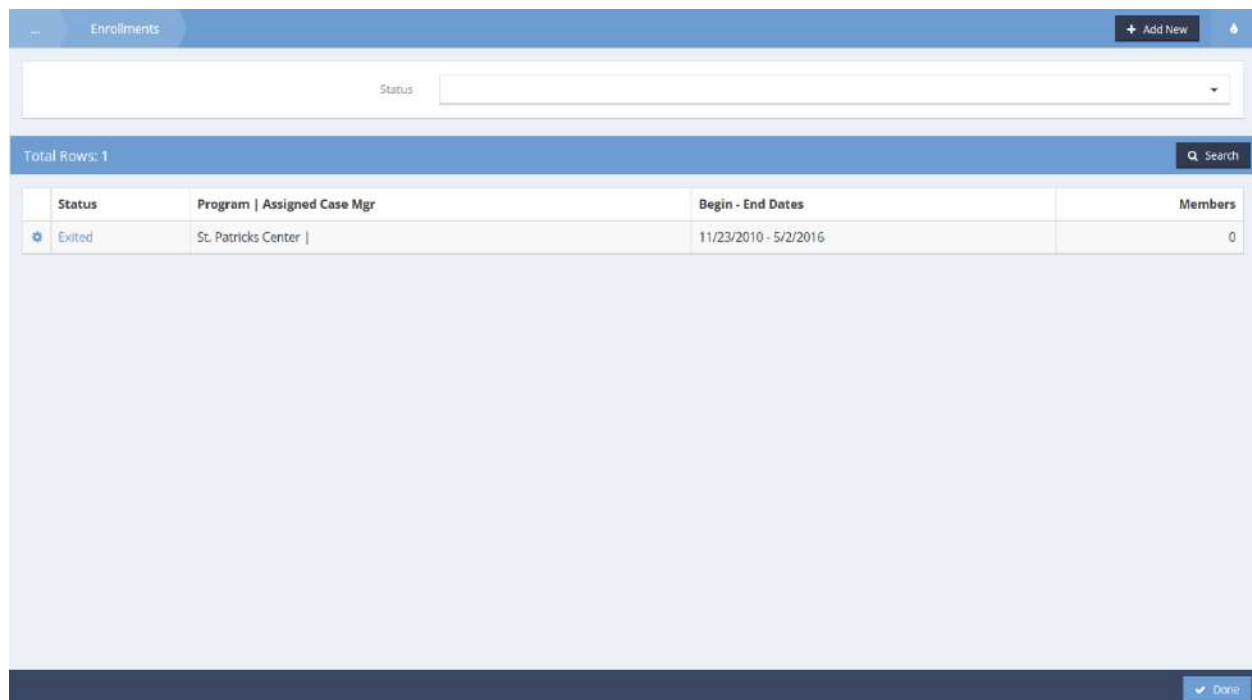
Search

Case Begin - End Date	Last Name	First Name	Gender	Program Name (HyperText Link)
1/17/2011 - Open	Caputo	Giulina	Transgender Male to Female	St. Patricks Center
1/13/2011 - Open	Midnight	Star	Female	


Done

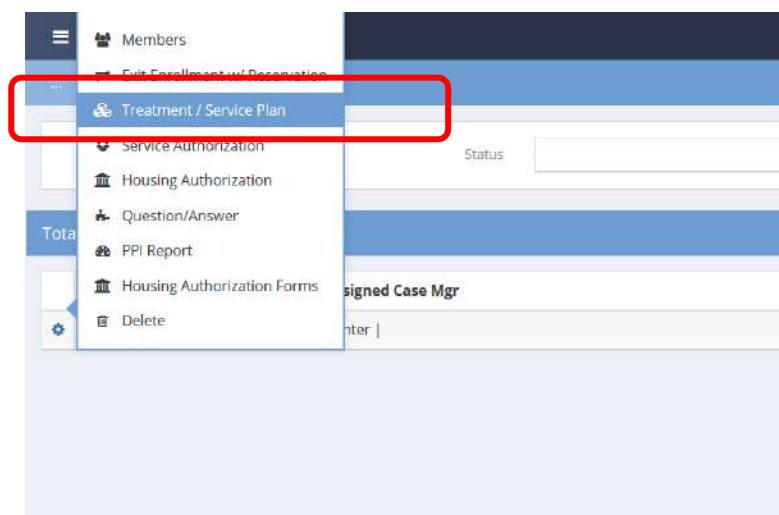
Select the desired program name.

The Enrollments form displays.





Status	Program   Assigned Case Mgr	Begin - End Dates	Members
Exited	St. Patricks Center	11/23/2010 - 5/2/2016	0

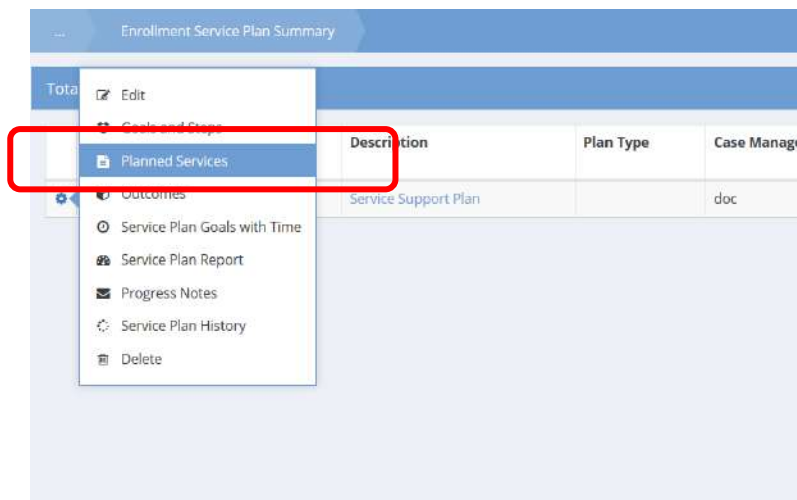
Select the action gear  icon associated with the desired program status and select Treatment / Service Plan from the menu options.



The Enrollment Service Plan Summary form displays.

Enrollment Service Plan Summary							
Total Rows: 1							
	Plan Begin - End Dates	Description	Plan Type	Case Manager	Case Note	% Complete Method	Plan ID
	5/4/2016 - 4/25/2019	Service Support Plan		doc		0.00 %	1631

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





The Planned Services form displays.

Service
Case Management
Classroom Training
Education
Community Meeting
Team Mentoring
Housing services



To add a new planned service, simply click the **+ Add New** button.

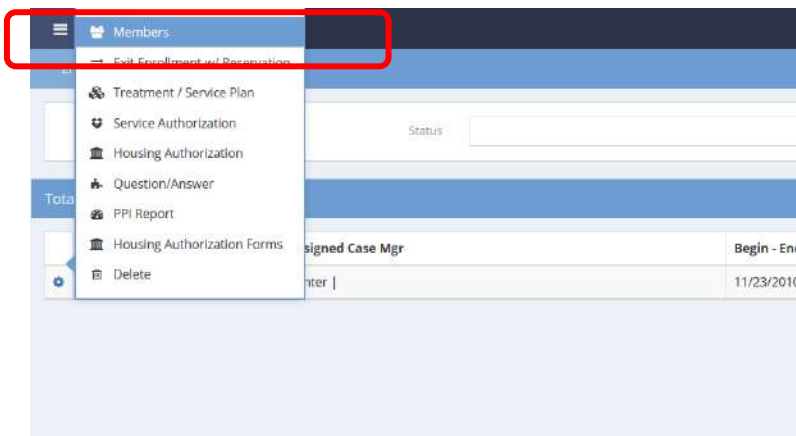
The Planned Service Add form displays.

Quantity	Description	Service Type ID
<input checked="" type="checkbox"/> 4	Education	96
<input checked="" type="checkbox"/> 3	Case Management	100
<input checked="" type="checkbox"/> 4	Housing services	274
<input checked="" type="checkbox"/> 88	Team Mentoring	243
<input checked="" type="checkbox"/> 1	Community Meeting	156
<input checked="" type="checkbox"/> 10	Classroom Training	117
<input checked="" type="checkbox"/>	Criminal Justice / Legal Counselling	123
<input checked="" type="checkbox"/>	AA Meeting	161
<input checked="" type="checkbox"/>	Housing Assistance	412
<input checked="" type="checkbox"/>	Service no approval	158
<input checked="" type="checkbox"/>	Service w/approval	157
<input checked="" type="checkbox"/>	Child Care	118
<input checked="" type="checkbox"/>	Vehicle Donation	227
<input checked="" type="checkbox"/>	Gift Card	228
<input checked="" type="checkbox"/>	SOY Mentoring	242
<input checked="" type="checkbox"/>	Emergency Shelter Bed Night	120



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.


<input checked="" type="checkbox"/>		Criminal Justice / Legal Counselling	123
<input checked="" type="checkbox"/>		AA Meeting	161
<input checked="" type="checkbox"/>	4	Housing Assistance	412
<input checked="" type="checkbox"/>		Service no approval	158
<input checked="" type="checkbox"/>		Service w/approval	157

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.

Enrollment Members for Case Management							
	Client	Provider	Program Entry - Exit Dates	Restriction	Exit Type	MemberID	FamilyMember.DateRemoved
	Caputo, Giuseppe	DV Shelter	11/23/2010 - 5/2/2016	Shared		1677	12/31/9999 12:00:00 AM
	Caputo, Giulina	Kings Emergency Shelter	11/23/2010 - 5/2/2016	Shared		1681	12/31/9999 12:00:00 AM
	Caputo, Gregini	DV Shelter	11/23/2010 - 5/2/2016	Shared		1682	5/2/2016 12:00:00 AM

Select the action gear  icon associated with the desired member and select Edit Dates For Removed Members from the menu options.

Enrollment Members for Case Management				
Client	Provider	Program Entry - Exit Dates	Restriction	Exit Type
Caputo, Giuseppe	DV Shelter	11/23/2010 - 5/2/2016	Shared	
		11/23/2010 - 5/2/2016	Shared	
		11/23/2010 - 5/2/2016	Shared	

The Edit Removed Member Entry Exit Dates form displays.

Edit Dates For Removed Members.


Edit Removed Member Entry Exit Dates

🔍 Edit enrollment dates for clients that have been removed the family on the enrollment.

Begin Date: 11/23/2010

End Date: 05/02/2016

Save Cancel

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.

Subordinates - My Team Members			
Total Rows: 3			
Team Members	Last Name, First Name	Begin - End Dates	User ID
 UserA1	SecurityTest, UserA1	11/15/2012 - Open	3446
 UserD1	SecurityTest, UserD1	11/15/2012 - Open	3450
 nina	Wilson, Nina	5/15/2014 - Open	1819

Click the action gear  icon associated with the desired user and select Expense Reports from the menu options.

The Expense Reports form displays.

Expense Reports						
Total Rows: 1						
ExpenseID	Customer	Transaction Date	Type	Description of Work	Amount	View File
 63	Appalachian Regional Coalition on Homelessness	3/10/2017	60400 - Computer & Internet Expenses	lskdjlskdjfkisd	5654654.0000	

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  button.



The Expense Report Header form displays.

The Expense Report Header form displays. It includes fields for From Date, To Date, Expense Report Description, Submitted Date, and Department. Below these fields is a table with 5 columns: Customer, Transaction Date \*, Type \*, Amount \*, and Upload Image. The table currently shows 0 rows. At the bottom right, there are Save and Cancel buttons.

Enter a date range and description and use the **+ Add Row** button to add detailed information for each expense. The row expands.

The Expense Report Header form displays with one row of data. The row includes fields for Customer, Transaction Date \*, Type \*, Amount \*, and Upload Image. The row is expanded to show additional details: Description of Work, Project \*, Task \*, Is Entertained (checkbox), Begin Location, and End Location. At the bottom left, there is an **+ Add Signature** button. At the bottom right, there is a **Browse** button for the Upload Image field.

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 icon 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.

My Teams				
Total Rows: 2				
	Team Members	Team Type	Begin - End Date	# of Members
	Follow-ups	Issues Management	8/22/2011 - Present	3
	Group	Approvers	8/14/2013 - Present	6

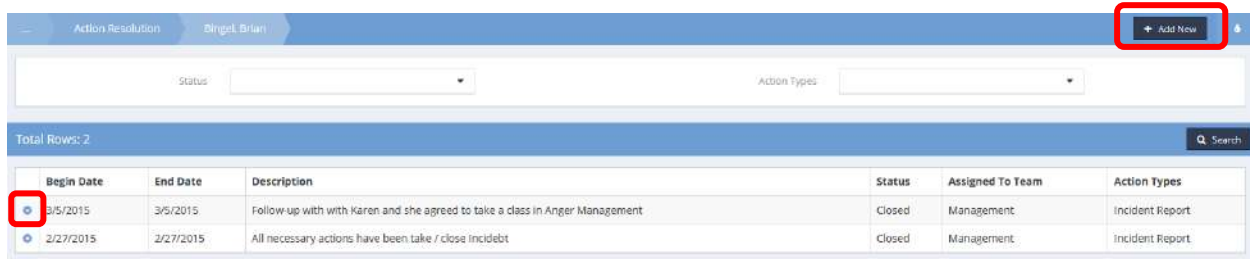
Team Followups					
Total Rows: 100					
	FollowUp Type	Begin Date	End Date	Client Dashboard	Client Name
<input checked="" type="checkbox"/>	Diagnosis	7/13/2015	Present	Adamson, Ray	Adamson, Ray
<input checked="" type="checkbox"/>	Diagnosis	7/13/2015	Present	Adamson, Ray	Adamson, Ray

### 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.


My Teams				
Total Rows: 7				
	Team Name	Team Type	Begin - End Date	# of Members
	Management	Approvers	2/1/2011 -	11
	Team Members	Issues Management	8/22/2011 - Present	3
	Follow-ups	Approvers	9/26/2011 - Present	7
	Actions	Approvers	11/15/2011 - Present	21
	Approval2	Approvers	11/15/2011 - Present	12
	Approval3	Approvers	11/15/2011 -	5
	Team Training Approval Group	Approvers	8/14/2013 - Present	6

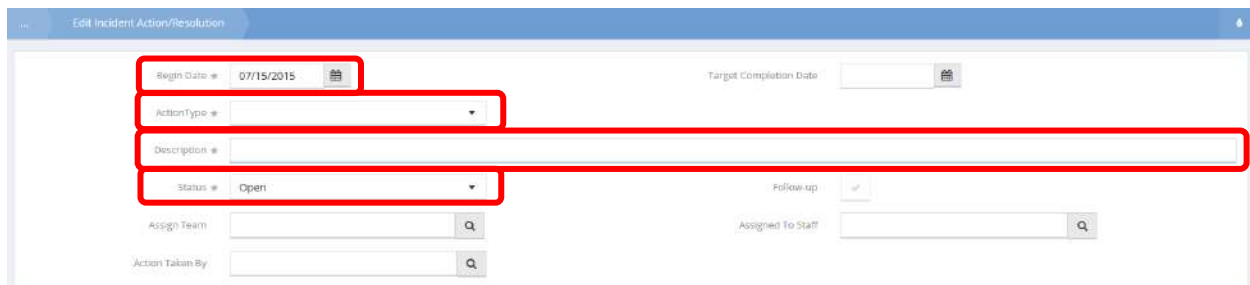
The Action Resolution form displays.



The screenshot shows the 'Action Resolution' form for 'Bingqi, Brian'. At the top right, there is a '+ Add New' button highlighted with a red box. Below the header, there are filters for 'Status' and 'Action Types'. A 'Total Rows: 2' indicator is present. A table displays the following data:

	Begin Date	End Date	Description	Status	Assigned To Team	Action Types
	3/5/2015	3/5/2015	Follow-up with with Karen and she agreed to take a class in Anger Management	Closed	Management	Incident Report
	2/27/2015	2/27/2015	All necessary actions have been take / close incident	Closed	Management	Incident Report

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.



The screenshot shows the 'Edit Incident Action/Resolution' form. The following fields are highlighted with red boxes:

- Begin Date: 07/15/2015
- Action Type: (dropdown menu)
- Description: (text input field)
- Status: Open

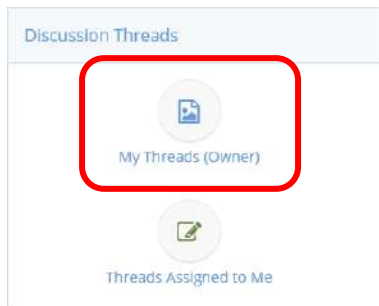
Other visible fields include Target Completion Date, Follow up (checkbox), Assign Team, Assigned To Staff, and Action Taken By.

Enter a date, action type, description and status. Click **Save** when finished.

## Discussion Threads

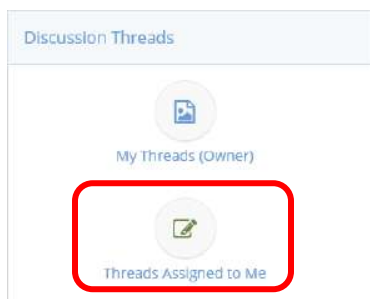
Discussion Threads functionality can be implemented in various areas in CaseWorthy™. In brief, users comment on tasks and/or transactions in the system and journal the comments in a thread. In baseline, this functionality is implemented on incident report approval processes. Once a user is included in 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.



My Thread Owner						
Total Rows: 1						
Type	Summary Title	Comment	Status	Created By User, Date	Summary ID	Thread ID
 thread			Open	aellason, 4/14/2015		110 155




Thread Assigned To Me						
Total Rows: 0						
User Name	Summary Date	Summary Description	Thread Comment	Thread Date	Summary ID	Thread ID



## Email History




Clicking the "Email History"  icon opens the email history summary form. This form displays all emails that involve the logged-in user. Click the  button to see all email details.


User Email History <span>+ Add New</span>			
Total Rows: 5			
Email Date	Subject	Sent To	View Email
4/8/2015 10:27:37 AM	Issue Management	acliason7@outlook.com	
4/7/2015 9:48:24 AM	Appointment Confirmation	buihuih@Some.com	

To create a new email, click the  button.

User Email History <span>+ Add New</span>			
Email Date Range: 04/03/2015 through 07/02/2015			
Total Rows: 34 <span>Search</span>			
Email Date	Subject	Sent To	View Email
7/1/2015 12:51:10 PM	Issue Management	acliason7@outlook.com	
7/1/2015 12:50:07 PM	Issue Management	acliason7@outlook.com	

The Create Email form displays.

Create Email	
To *	
Subject *	Your Email * acliason7@outlook.com
Email Template	
Body * <div>  <div></div> </div>	
Words: 0	

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  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.

View Bulletin Board History			
Total Rows: 1			
Original Message Date	Read Date	Message Subject	View Details
1/20/2015	1/22/2015	MY TEST MESSAGE	<a href="#">View Details</a>

## 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.

Actions and Resolutions Summary						
Status:		Open		Action Types:		
Total Rows: 4						
Begin Date	End Date	Description	Status	Action Types	Assign To Team	
6/3/2016		resolved.	Open	Issue Management	Quality Assurance	
		test	Open	Issue Management	Quality Assurance	
6/3/2016		awerghuajwer oiregh aoiwehgf aoiwehgf aoiwehgf :oiWHE :tUJlw' :oj tP0W3UT Q923U 5N5EDVERY W408HT LAWJEJG(P9 J	Open	Issue Management	Quality Assurance	
		fdsfdsafdsaf	Open	Issue Management	Quality Assurance	

The Edit Incident Action/Resolution form displays.

Begin Date \*

06/12/2015

Target Completion Date

<DOCTYPE html><html><head></head><body><p>resolved.</p></body></html>

Area Identified

Issue Management

Action Type \*

Other

Status \*

Open

Assigned To Staff

Elason

Assign Team

Quality Assurance

Action Close Information

Action Taken By

Make any desired changes and click  Save 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.

My Scheduled Reports		
Report Name	Description	Next Run Time
HUD CoC APR	test	
CEAP Report	test1	
Community Services Block Grant Section G Report	test2	

To edit a scheduled report, click the action gear icon and click Edit.

My Scheduled Reports		
<div> <div>Edit</div> <div>Delete</div> </div>	Description	Next Run Time
	test	

The Edit Schedule Report form displays.

Edit

Schedule Report

Report Description \*

test

Teams

Choose Options...

Email Template \*

QICP Referral

Report Format \*

PDF

Number To Keep \*

5

Report Frequency and Scheduling Information

Frequency Type \*

Months

Frequency

1

Start Date \*

06/29/2015

Start Time \*

12 AM

End Date

Open

Report Parameters

Start Date \*

Beginning Of This Week

End Date \*

End Of This Week

Organization(s) \*

All | Some

Project(s) \*

All | Some

Disable Report

Save

Cancel

Make any changes and click the Save button when finished editing.



## My Unfinished Workflows

**Objective:** View unfinished workflows.

**Navigation:** Case Management>My CaseWorthy>My CaseWorthy

The screenshot shows the 'My CaseWorthy' dashboard. On the left is a dark sidebar with a navigation menu. The main area is titled 'My CaseWorthy' and contains a grid of icons. The icon for 'My Unfinished Workflows' (a blue square with a white play button) is highlighted with a red rectangular box. To the right of the dashboard grid, there are two tables.

Team Name	Team Type	Begin Date
Super Special Kids	Approvers	09/01/2015
Approval1	Approvers	11/15/2011
Approval2	Approvers	11/15/2011


  

Account Name	Step Name	Approval Count
_Gas Account	First Multi Review	1
_LIHEAP - 2014	First Multi Review	1
_LIHEAP (2014 - Also)	First Multi Review	1
CCSC Account	First Multi Review	3
HHS/IRHY - Maternity Group Home for Pregnant and Parenting Youth	First Multi Review	1
jane 4	First Multi Review	1
TVC	First Multi Review	2
2010 Demo	MEGA Test Step 1	3
Sample Acc	Single Approval	1
_Gas Account	Single Approval	10

Select My Unfinished Workflows from the My CaseWorthy dashboard.

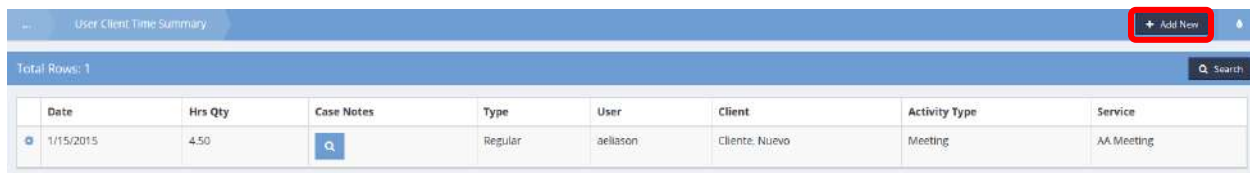
The My Unfinished Workflows form displays.

	Workflow Name	Client Name	Created Date
<input checked="" type="checkbox"/>	Add Family Member and Enrollments New		8/22/2016 4:19:00 PM
<input checked="" type="checkbox"/>	Add New Family		8/22/2016 12:39:00 PM


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  in the Time window. The User Client Time Summary form displays.

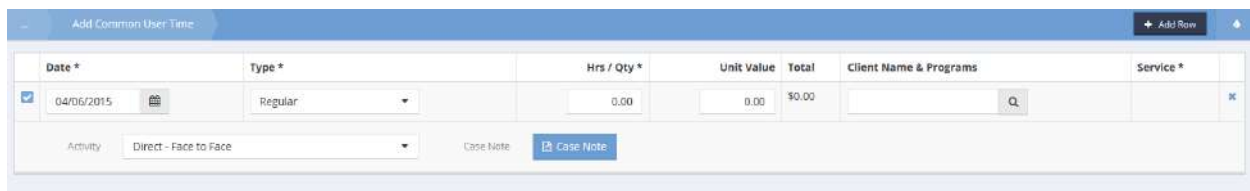


The User Client Time Summary form displays a table with the following data:



Date	Hrs Qty	Case Notes	Type	User	Client	Activity Type	Service
1/15/2015	4.50		Regular	adlason	Cliente: Nuevo	Meeting	AA Meeting


Buttons: + Add New, Search



To add a new entry, click on the  button. The Add Common User Time form displays.



The Add Common User Time form displays the following fields:

Date *	Type *	Hrs / Qty *	Unit Value	Total	Client Name & Programs	Service *
04/06/2015 	Regular	0.00	0.00	\$0.00		

Activity: Direct - Face to Face Case Note 

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.



The Find Clients and Programs Lookup form displays the following fields:

Client Name	Program Name
<input type="text"/>	<input type="text"/>

Search 

Enter any or all of the Client Name and Program Name and click on the  button.

Select the desired row from the list and click on it.


Find Clients and Programs Lookup

Find Clients and Programs


Client Name: Bosell Program Name:

Total Rows: 11

Client Name	Program Name	Program Begin - End Dates
Bosell, Steve	Adult Education	1/23/2015 - Present
Bosell, Steve	CC Housing	1/26/2015 - Present
Bosell, Steve	CC Housing	1/26/2015 - Present
Bosell, Steve	2 YAGA	3/9/2015 - Present
Bosell, Steve	CC Pregnancy	3/18/2015 - Present
Bosell, Steve	CC Refugee Reception & Placement	3/19/2015 - Present
Bosell, Steve	Catholic Charities: All in One	3/9/2015 - Present
Bosell, Steve	HIT program	3/9/2015 - Present
Bosell, Steve	SOVR	3/18/2015 - Present
Bosell, Steve	CC Adoption	3/18/2015 - Present
Bosell, Steve	CC Emergency Services	3/18/2015 - Present

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.

Add Common User Time

☒ 04/06/2015 


Type: Regular



Hrs / Qty: 4.5 Unit Value: 0.00 Total: \$0.00


Client Name & Programs: Bosell, Steve


Service: Adult Counseling Service

Activity: Direct - Face to Face Location:

Case Note  Case Note




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.

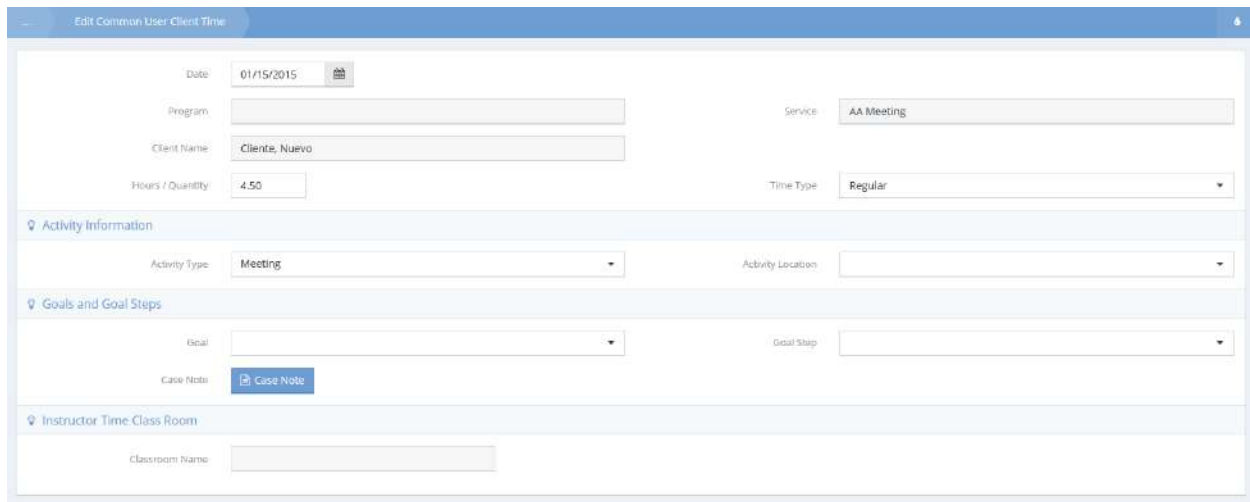
To edit time, locate the desired entry and click on the action gear  icon associated with it and select Edit from the pop-up menu that appears.

User Client Time Summary

Total Rows: 1

	Hrs Qty	Case Notes	Type	User	Client	Activity Type	Service
 Edit  Delete	4.50		Regular	bellason	Cliente, Nuevo	Meeting	AA Meeting

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



**Edit Common User Client Time**

Date: 01/15/2015

Program:

Client Name: Cliente, Nuevo

Hours / Quantity: 4.50

Service: AA Meeting

Time Type: Regular

**Activity Information**


Activity Type: Meeting

Activity Location:

**Goals and Goal Steps**

Goal:

Goal Step:

Case Note: 

**Instructor Time Class Room**

Classroom Name:

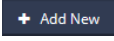
## Time – Client, Services,Goals, Steps

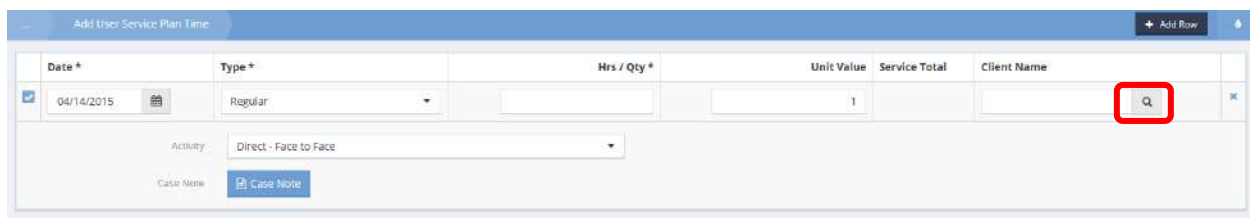
**Objective:** Add, edit or view user service plan time.

Click on the Time – Client, Services,Goals, Steps  icon in the Time window. The User Time - Client Service Plan form displays.




Date	Client	Type	Activity Type	Service	Hrs Qty
4/10/2015 1:05:00 PM		Regular			0.00
4/9/2015 12:00:00 PM		Regular			0.08
1/15/2015 12:00:00 AM	Cliente, Nuevo	Regular	Meeting	AA Meeting	4.50



To add service time, click on the  button. The User Service Plan Time (Add) form Displays.




Date *	Type *	Hrs / Qty *	Unit Value	Service Total	Client Name
04/14/2015	Regular		1		

Activity: Direct - Face to Face


Case Note 

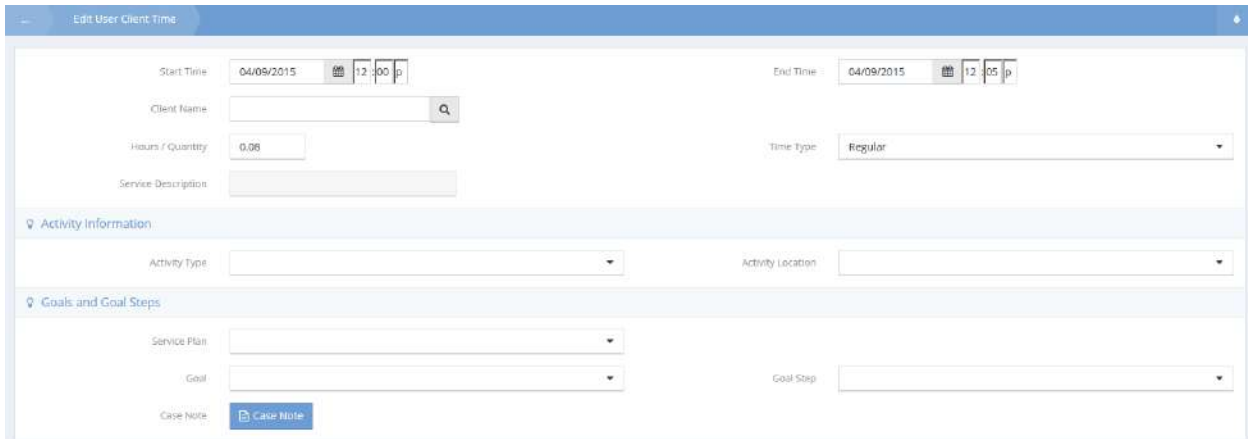
If the default values are not correct, make any changes desired. Enter the number of hours and click on the magnifying glass  icon for client name to select the client receiving the service. Add case notes if desired. Click on the  button.

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.



Date	Client	Type	Activity Type	Service	Hrs Qty
4/10/2015 1:05:00 PM		Regular			0.00
4/9/2015 12:00:00 PM		Regular			0.08
1/15/2015 12:00:00 AM	Cliente, Nuevo	Regular	Meeting	AA Meeting	4.50

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



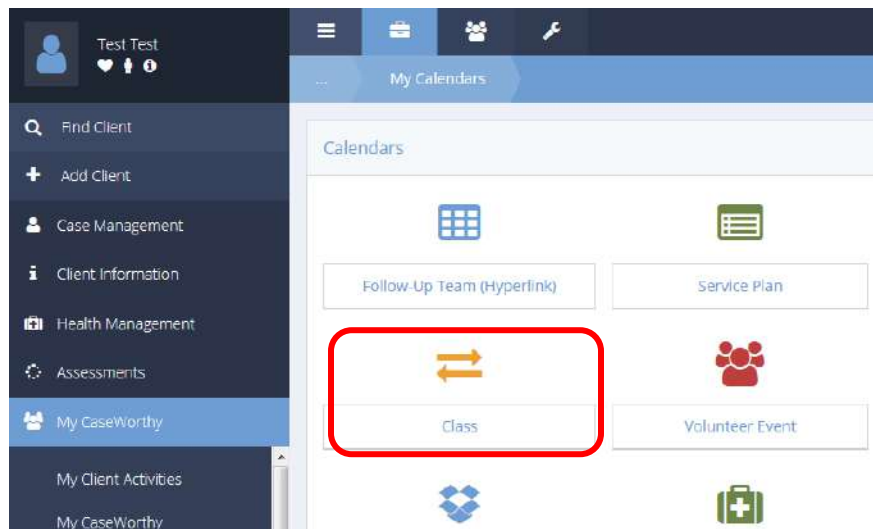
The screenshot shows the 'Edit User Client Time' form. The form has a blue header bar with the title 'Edit User Client Time'. Below the header, there are several input fields and sections. The 'Start Time' field is set to '04/09/2015' at '12:00 p'. The 'End Time' field is set to '04/09/2015' at '12:05 p'. The 'Client Name' field is empty with a search icon. The 'Hours / Quantity' field is set to '0.06'. The 'Time Type' dropdown is set to 'Regular'. The 'Service Description' field is empty. Below these fields, there are two sections: 'Activity Information' and 'Goals and Goal Steps'. The 'Activity Information' section has 'Activity Type' and 'Activity Location' dropdowns. The 'Goals and Goal Steps' section has 'Service Plan', 'Goal', and 'Goal Step' dropdowns. At the bottom left, there is a 'Case Note' button.

Start Time	04/09/2015 12:00 p	End Time	04/09/2015 12:05 p
Client Name			
Hours / Quantity	0.06	Time Type	Regular
Service Description			
Activity Information			
Activity Type		Activity Location	
Goals and Goal Steps			
Service Plan		Goal Step	
Goal			
Case Note	Case Note		

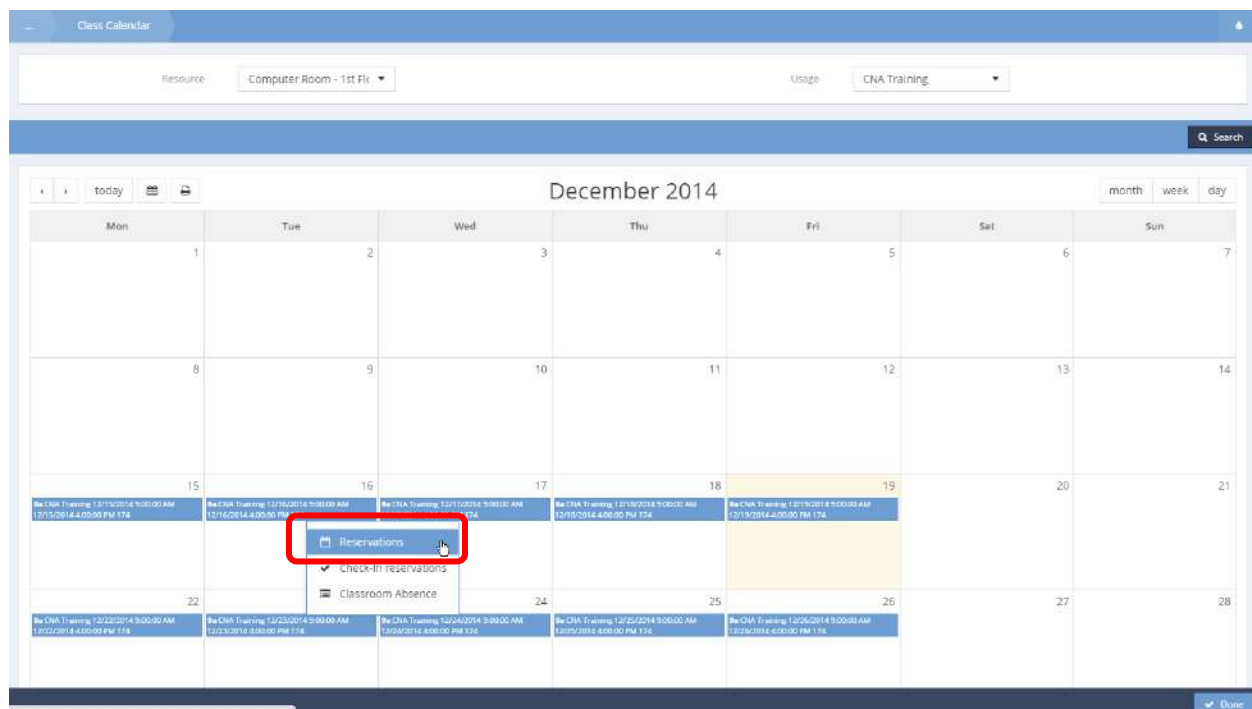
## Calendars

### 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.


The screenshot shows the 'Reservations' form. At the top right, there is a blue bar with a '+ Add Row' button. Below this is a date range selector for 'Reservation Date Between' with dates 12/14/2014 and 12/20/2014. A status bar indicates 'Total Rows: 0'. The main form area has several input fields: 'Client\*' with a magnifying glass icon, 'Start Date\*' with the date 12/15/2014, 'End Date\*' with the date 12/31/999, and a 'Check Client In?' checkbox. Below these are fields for 'Enrollment', 'Locker', 'Lease Lookup', and 'Enter New Rent Amount'. A 'Delete' button is located to the right of the 'Locker' and 'Lease Lookup' fields.

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.

The screenshot shows the 'Find Client with Reservation Information Lookup' form. It features input fields for 'Last Name', 'First Name', 'Name', 'Birth Date', and 'Scan Card ID'. A blue bar at the top right contains a '+ Add Row' button. A blue bar at the bottom right contains a 'Search' button with a magnifying glass icon.

Enter any known fields and click the  Search button.

Find Client with Reservation Information Lookup

 Search

Name	Current Reserved In	Bar Program	Bar Atten Service	Bar Enroll Ser.	Birth Date	Start Date	End Date	Resource ID
Cliente, Nuevo					4/1/1949			
Cliente, Nuevo					4/1/1949			
Cliente, Nuevo					4/1/1949			
Cliente, Maria					5/2/1949			
Cliente, Nuevo	Morning				4/1/1949	12/5/2014	Present	1109
Cliente, Nuevo	Midday				4/1/1949	12/5/2014	Present	1109
Cliente, Nuevo	Pre-meal				4/1/1949	12/5/2014	Present	1109


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)


Class Calendar

Provider: CaseWorthy
 Resource: Computer Room - 1st Floor, Main Building
 Usage: English as a Second Language Class

 Search

< > today
 March 2017
 month week day

Mon	Tue	Wed	Thu	Fri	Sat	Sun
27	28	1	2	3	4	5
Re English as a Second Language Class 2/27/2017 9:00:00 AM 2/27/2017 12:00:00 PM 172		Re English as a Second Language Class 3/1/2017 9:00:00 AM 3/1/2017 12:00:00 PM 172				
6	7	8	9	10	11	12
Re English as a Second Language Class 3/6/2017 9:00:00 AM 3/6/2017 12:00:00 PM 172		Re English as a Second Language Class 3/8/2017 9:00:00 AM 3/8/2017 12:00:00 PM 172				
13	14	15	16	17	18	19
Re English as a Second Language Class 3/13/2017 9:00:00 AM 3/13/2017 12:00:00 PM 172		Re English as a Second Language Class 3/15/2017 9:00:00 AM 3/15/2017 12:00:00 PM 172				

 Done

Click on a class and select Check-In Reservations from the menu options.



The Resource Usage Attendance Calendar form displays.

Check-in reservations.

Resource Usage Attendance Calendar

Date: 03/05/2017

Event:

Date	Time
03/06/2017-Monday	09:00 am-12:00 pm
03/08/2017-Wednesday	09:00 am-12:00 pm

Event Summary

Min	Max	Reserved	Checked in
0	15	16	0

Total Rows: 16

Client	Slot	Start Date	End Date
Kolesiak, Viola			
Kolesiak, Stella			
Gibson, Ben			
Page, Dan			
Hood, Robin			
New take			

Expand the row on a client to view more options.

Total Rows: 1

Client	Slot	Start Date	End Date
Kolesiak, Viola			
Kolesiak, Stella			
Gibson, Ben	3-Seat Desk	03/08/2017	03/08/2017

End Reservation: ☐

Tardy or Left Early? ☒

Tardy by: 15 minutes

Left Early by: 15 minutes

Tardy Description:

Left Early Description:

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).

The screenshot shows the 'Class Calendar' interface. At the top, there are filters for 'Provider' (CaseWorthy), 'Resource' (Computer Room - 1st Floor, Main Building), and 'Usage' (English as a Second Language Class). Below the filters is a search bar. The main area displays a calendar for March 2017. The calendar shows events for 'English as a Second Language Class' on various dates, including 2/27/2017, 3/1/2017, 3/6/2017, and 3/9/2017. The calendar view includes tabs for 'month', 'week', and 'day'.

## Quiz/Test Setup

Click on a class and select Quiz/Test Setup from the menu options. The Course Quizzes and Tests form displays.

The screenshot shows the 'Quiz/Test Setup' interface. At the top, there are filters for 'Date' (03/08/2017), 'Time' (09:00 a), 'Test Name', and 'Course' (English). Below the filters is a search bar. The main area displays a table with 12 rows, showing test types and their scores/weights. The table has columns for 'Test Name', 'Test Type', 'Score', 'Weight', and 'Test Type ID'. The test types listed are Math, English, Science, US History, PE, Aptitude, Social Sciences, Advanced Nuclear Physics, TABE, Financial Literacy, Test, and I Sample.

Test Name	Test Type	Score	Weight	Test Type ID
<input checked="" type="checkbox"/> Math		0	0	4
<input checked="" type="checkbox"/> English		0	0	5
<input checked="" type="checkbox"/> Science		0	0	6
<input checked="" type="checkbox"/> US History		0	0	7
<input checked="" type="checkbox"/> PE		0	0	8
<input checked="" type="checkbox"/> Aptitude		0	0	13
<input checked="" type="checkbox"/> Social Sciences		0	0	15
<input checked="" type="checkbox"/> Advanced Nuclear Physics		0	0	48
<input checked="" type="checkbox"/> TABE		0	0	71
<input checked="" type="checkbox"/> Financial Literacy		0	0	72
<input checked="" type="checkbox"/> Test		0	0	73
<input checked="" type="checkbox"/> I Sample		0	0	92

At the bottom right, there are 'Save' and 'Cancel' buttons.

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.

Quiz/Test Results

Quiz and Test Results Calendar

Date: 03/05/2017

Test Name: [Dropdown]

Event: [Table with Date and Time columns]

Event Summary: [Table with Min, Max, Reserved, Checked in columns]

Total Rows: 4

Client	Score *	Letter Grade *	Value
<b>Science</b>			
<input checked="" type="checkbox"/> Page, Dan	0.00		
<input checked="" type="checkbox"/> Kolesiak, Stella	0.00		
<b>US History</b>			
<input checked="" type="checkbox"/> Page, Dan	0.00		
<input checked="" type="checkbox"/> Kolesiak, Stella	0.00		

Save Cancel

Students who have been checked in to this class on this day, display. Expand a row to enter a score for the student.

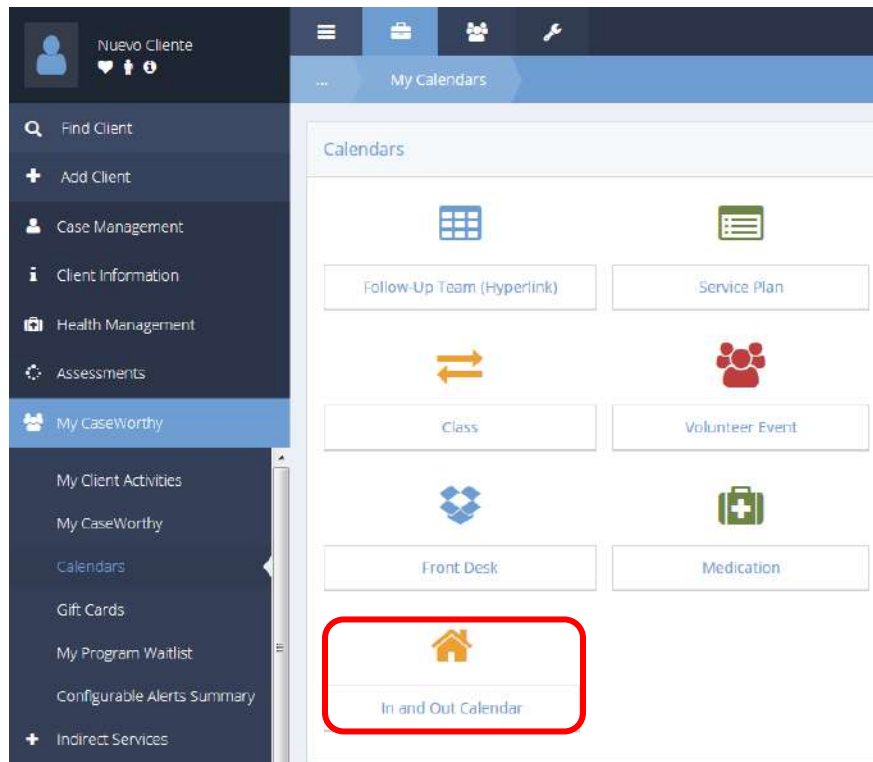
Total Rows: 1

Client	Score *	Letter Grade *	Value
<b>Science</b>			
<input checked="" type="checkbox"/> Page, Dan	0.00		
<div> <div>Score</div> <div>None</div> </div>			
<input checked="" type="checkbox"/> Kolesiak, Stella	0.00		
<b>US History</b>			
<input checked="" type="checkbox"/> Page, Dan	0.00		

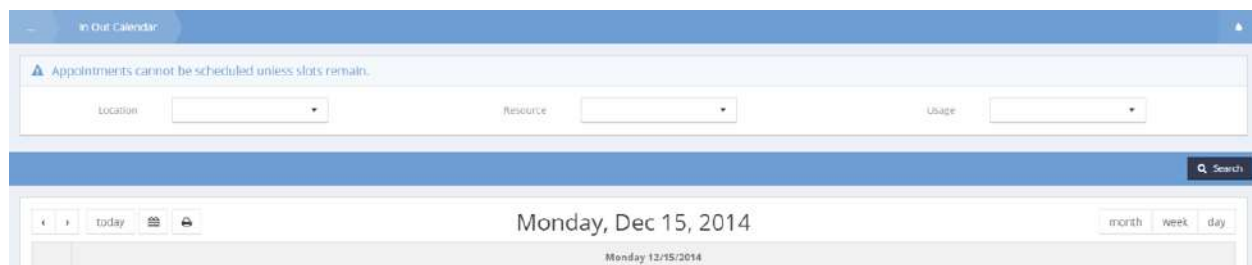
Both a numeric score and letter grade can be entered.

## In and Out Calendar

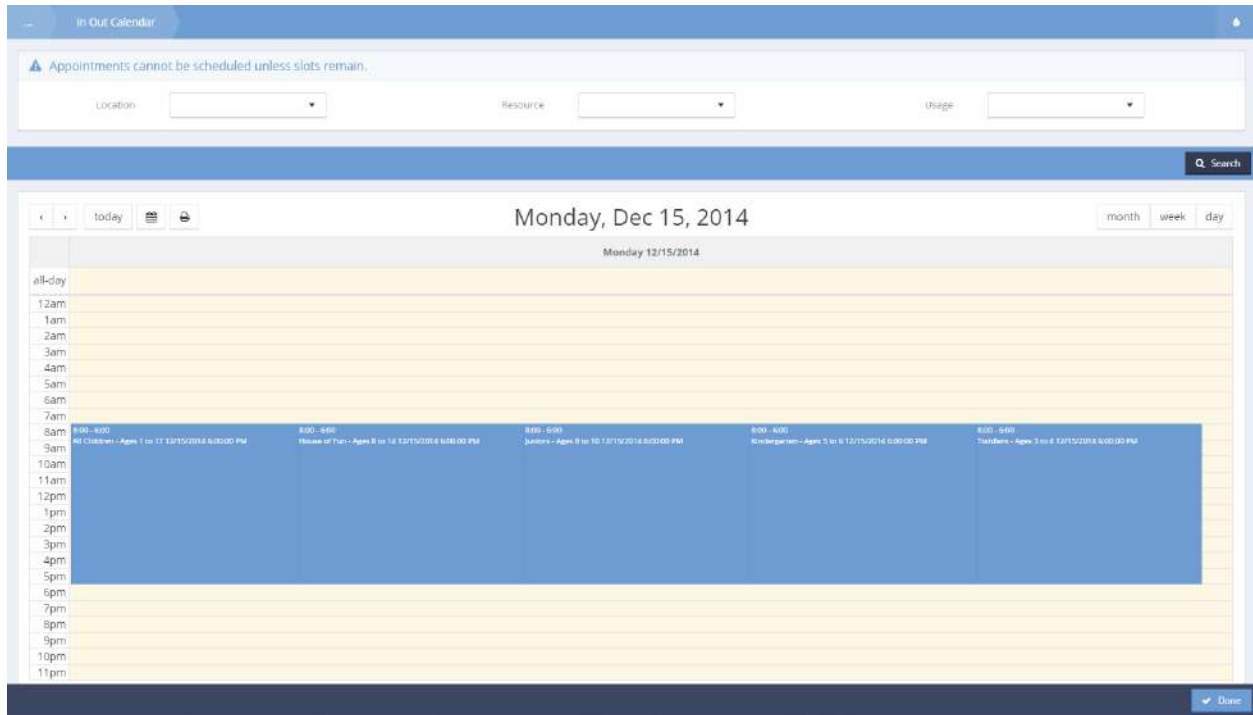
**Objective:** View the In and Out calendar and generate a roster report.



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.

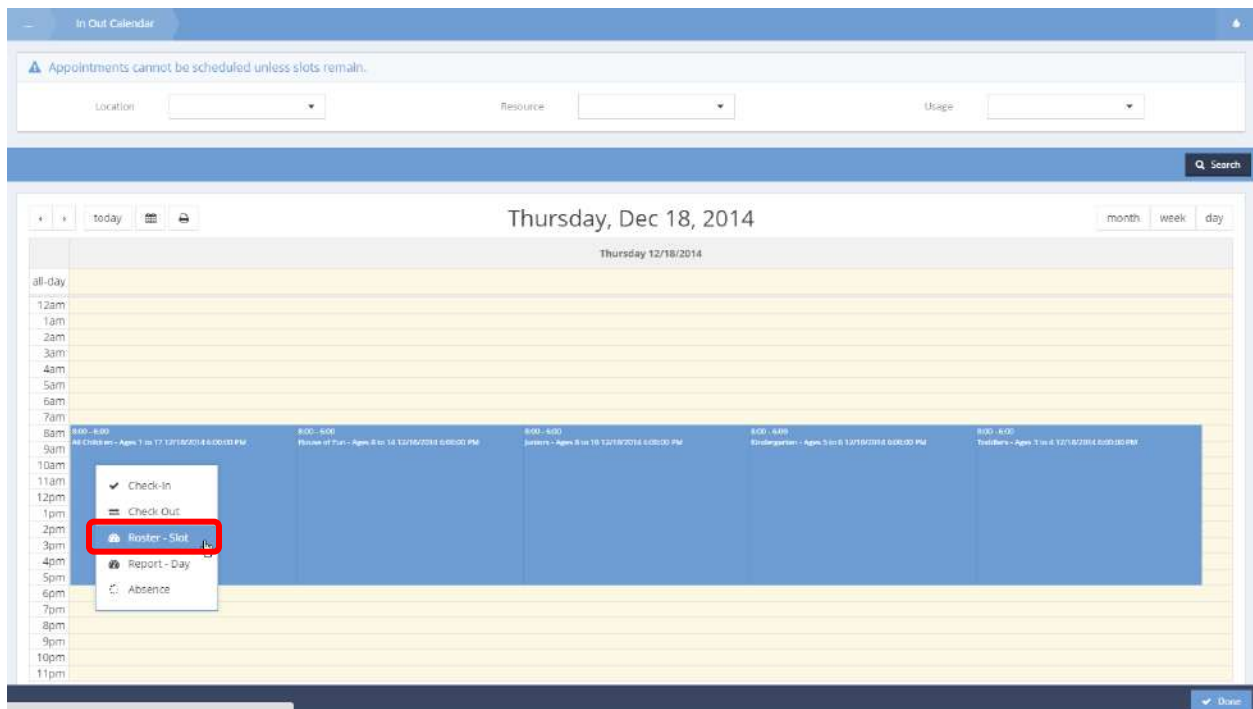


The In Out Calendar set to view a single day with five-day care classrooms.



### 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 action - 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	1:35 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.

In Out Calendar

Appointments cannot be scheduled unless slots remain.

Location:  Resource:  Usage:

Search

Friday, Dec 19, 2014

month week day

Friday 12/19/2014

all-day	8:00 - 6:00 All Children - Ages 1 to 17 12/19/2014 6:00:00 PM	8:00 - 6:00 House of Fun - Ages 8 to 14 12/19/2014 6:00:00 PM	8:00 - 6:00 Juniors - Ages 8 to 10 12/19/2014 6:00:00 PM	8:00 - 6:00 Kindergarten - Ages 5 to 6 12/19/2014 6:00:00 PM	8:00 - 6:00 Toddlers - Ages 3 to 4 12/19/2014 6:00:00 PM
12am					
1am					
2am					
3am					
4am					
5am					
6am					
7am					
8am					
9am					
10am					
11am					
12pm					
1pm					
2pm					
3pm					
4pm					
5pm					
6pm					
7pm					
8pm					
9pm					
10pm					
11pm					

Check-In

Check Out

Roster - Slot

Report - Day

Absence

Done

The In Out Check-In form displays.

Participant	Email	Check In *	Signature *	Parent Pick Up
<input checked="" type="checkbox"/> Arden, Cam				Parent Pick Up
<input checked="" type="checkbox"/> Arden, Baby3				Parent Pick Up
<input checked="" type="checkbox"/> Barker, Amanda				Parent Pick Up
<input checked="" type="checkbox"/> Test, Jane404Child				Parent Pick Up
<input checked="" type="checkbox"/> Test, Jane404Child				Parent Pick Up
<input checked="" type="checkbox"/> Jordan, Rhonda				Parent Pick Up
<input checked="" type="checkbox"/> test, CSBG test 2				Parent Pick Up

Click the clear checkbox ☒ to check in a participant. The field expands.

Participant	Email	Check In *	Signature *	Parent Pick Up
<input checked="" type="checkbox"/> Arden, Cam				Parent Pick Up
<input checked="" type="checkbox"/> Arden, Baby3	Create Email	01/12/2015 8 :00 a	Add Signature	Parent Pick Up
<input checked="" type="checkbox"/> Barker, Amanda				Parent Pick Up
<input checked="" type="checkbox"/> Test, Jane404Child				Parent Pick Up
<input checked="" type="checkbox"/> Test, Jane404Child				Parent Pick Up

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


In Out Check-in				
Participant	Email	Check In *	Signature *	Parent Pick Up
<input checked="" type="checkbox"/> Jane, JaneChild348				
<input checked="" type="checkbox"/> Price, Amy				
<input checked="" type="checkbox"/> Bonds, Sarah				
<input checked="" type="checkbox"/> Rigby, Amanda				

Click the  button. The Parent Pick Up form displays.

Parent Pick Up							
Relationship	Description	Name	Begin - End Dates	Emergency Contact	Email	Phone1 Type	Phone1
<input checked="" type="radio"/> Parent	Child Care Pick-up or Drop-off	Price, Scott	11/10/2014 - Present	No			

Click  to add a new pick-up contact. The Add Client Contact form displays in a new window.

Last Name *	<input type="text"/>	First Name *	<input type="text"/>
Begin Date *	01/12/2015 	End Date	Present 
Relationship *	<input type="text"/>	Category	Choose Options... 
			
<b>Contact Information</b>			
Phone 1 Type	<input type="text"/>	Phone 1	<input type="text"/>
Phone 2 Type	<input type="text"/>	Phone 2	<input type="text"/>
Email	<input type="text"/>		
Confirm Email	<input type="text"/>		
Is Emergency Contact	<input type="checkbox"/>		
 			

Enter a first and last name, begin date, and relationship. Click the  button.

The window closes and the Parent Pick Up form displays.

Parent Pick Up

Relationship	Description	Name	Begin - End Dates	Emergency Contact	Email	Phone1 Type	Phone1
Parent	Child Care Pick-up or Drop-off	Price, Scott	11/10/2014 - Present	No			

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

Parent Pick Up

Total Rows: 1

Name	Relationship	Description	Phone1	Phone1 Type	Email	Begin - End Date	Emergency Contact
 Edit  Delete	Parent	Child Care Pick-up or Drop-off				11/10/2014 - Present	No

The Edit Client Contact form displays.

Relationship:

Last Name:  First Name:

Category: Choose Options...  
Child Care Pick-up or Drop-off

Begin Date:  End Date:


Contact Information

Phone1 Type:  Phone1:

Phone2 Type:  Phone2:

Email:

Is Emergency Contact: ☐

Make any necessary changes and click the  Save 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.

[illegible]

Click on a desired event and select Check Out from the menu options that display.

The In Out Check-Out form displays.

Check Out

In Out Check-Out

Search

Participant	Check Out	Signature *	Parent Pick Up
<input checked="" type="checkbox"/> Balboa, Baby	3/10/2017 12:27 PM		Parent Pick Up
<input checked="" type="checkbox"/> Arden, Cam	3/10/2017 12:27 PM		Parent Pick Up
<input checked="" type="checkbox"/> Arden, Cam	3/10/2017 12:27 PM		Parent Pick Up
<input checked="" type="checkbox"/> Test_Jane404Child	3/10/2017 12:27 PM		Parent Pick Up
<input checked="" type="checkbox"/> Arden, Baby3	3/10/2017 12:27 PM		Parent Pick Up
<input checked="" type="checkbox"/> Barker, Amanda	3/10/2017 12:27 PM		Parent Pick Up
<input checked="" type="checkbox"/> Test_Jane404Child	3/10/2017 12:27 PM		Parent Pick Up
<input checked="" type="checkbox"/> Test_Jane404Child	3/10/2017 12:27 PM		Parent Pick Up
<input checked="" type="checkbox"/> Arden, Baby3	3/10/2017 12:27 PM		Parent Pick Up
<input checked="" type="checkbox"/> Test_Jane404Child	3/10/2017 12:27 PM		Parent Pick Up
<input checked="" type="checkbox"/> Test_Jane404Child	3/10/2017 12:27 PM		Parent Pick Up

Save Cancel

A list of all clients that have been checked in, displays. Select a client to check them out. The row expands.

Search

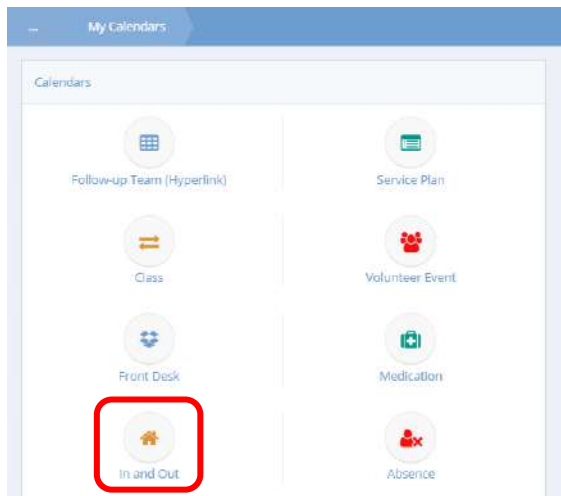
Participant	Check Out	Signature *	Parent Pick Up
<input checked="" type="checkbox"/> Balboa, Baby	03/10/2017 12:27 p	Add Signature	Parent Pick Up
Case Note  Case Note           Email / Notify Case Manager  Create Email			
<input checked="" type="checkbox"/> Arden, Cam	3/10/2017 12:27 PM		Parent Pick Up

Update the check-out date, add a signature, case note, and/or email. Use the Parent Pick Up button to indicate who picked up the client, if applicable. Save and close.

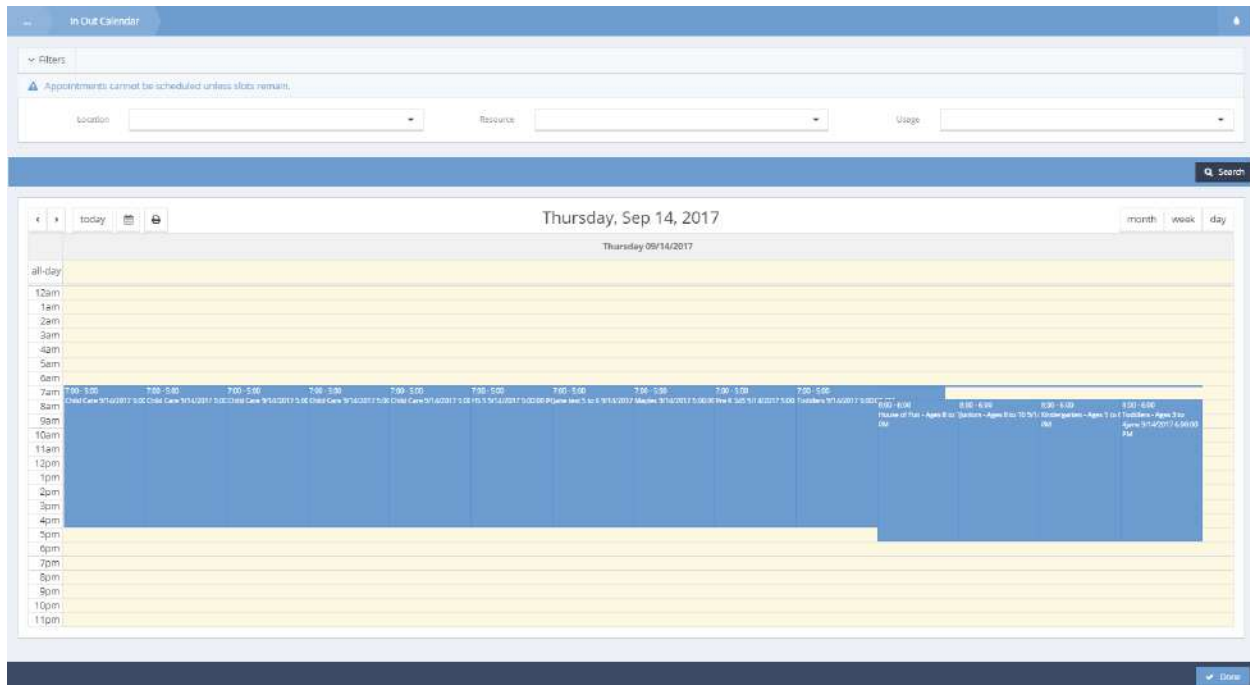
## Check-In

**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.

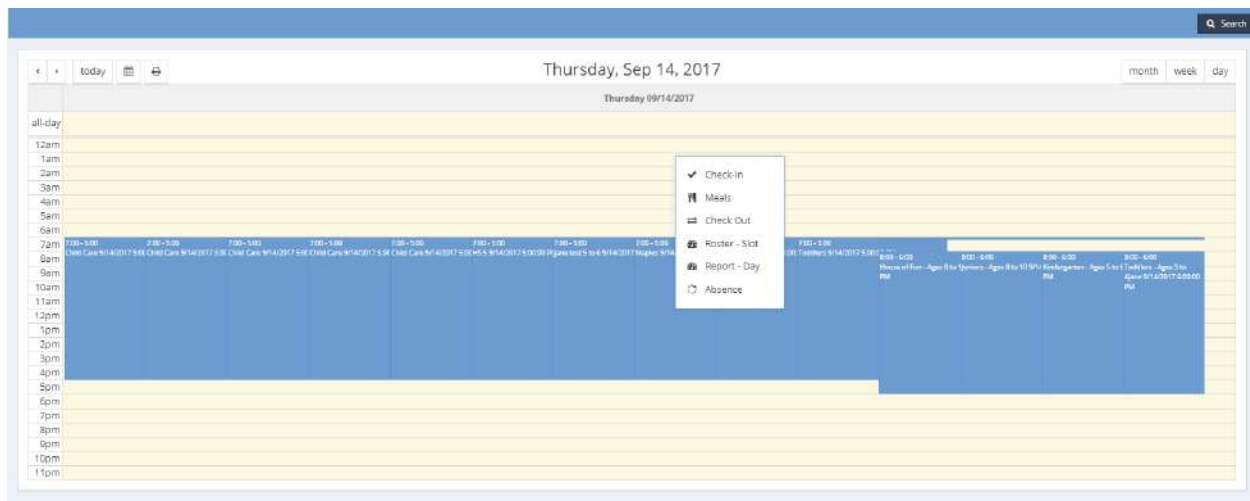
From the My Calendars dashboard, click on the icon labeled In and Out.



The In Out Calendar appears.



Click on an event. A pop-up menu appears.





Click Check-In.









The Check In form displays.

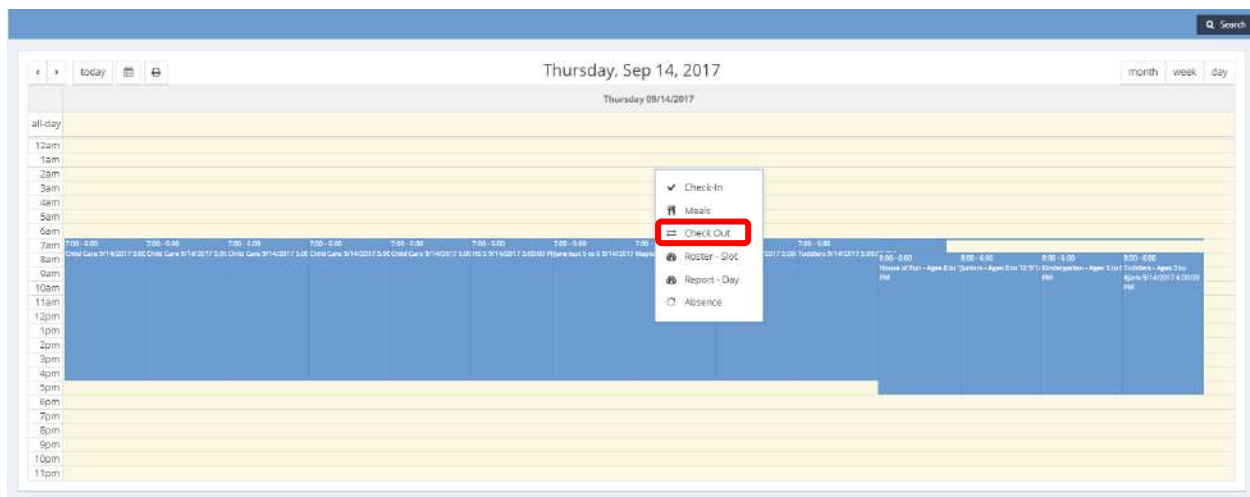
The screenshot shows the 'Check In' form interface. At the top, there's a header bar with the title 'Check In'. Below it is a filter bar with a 'Filters' button. A date and time selector shows '09/14/2017' at '11:15 AM'. A search bar is on the right. The main area is a table with columns: Participant, Check In, Signature, Parent Pick-up, Email, and Check Out. The table lists several participants, each with a small expandable icon (a square with a checkmark) in the Participant column. The 'Parent Pick-up' column contains 'Parent Pick-up' buttons for each row. The 'Check Out' column is empty.

Click the  icon next to the desired client. The row expands and the  icon turns blue.

This screenshot shows the 'Check In' form with the row for 'Kitty, Hello' expanded. The expanded row shows the 'Check In' date and time as '09/14/2017' at '11:15 AM', an 'Add Signature' button, a 'Parent Pick-up' button, an 'Email' field with a 'Create Email' button, and a 'Check Out' date of '12/31/9999'. The 'checked icon' is now blue. The other rows in the table are collapsed.




Click on the date  and time  icons to adjust the check in date and time. Click the  button to add a signature. Click the  button to choose a parent. Use the date  button in the Check Out column to specify a check out date. Click the  button to save and close the form and return to the In Out Calendar.

The In Out Calendar displays.



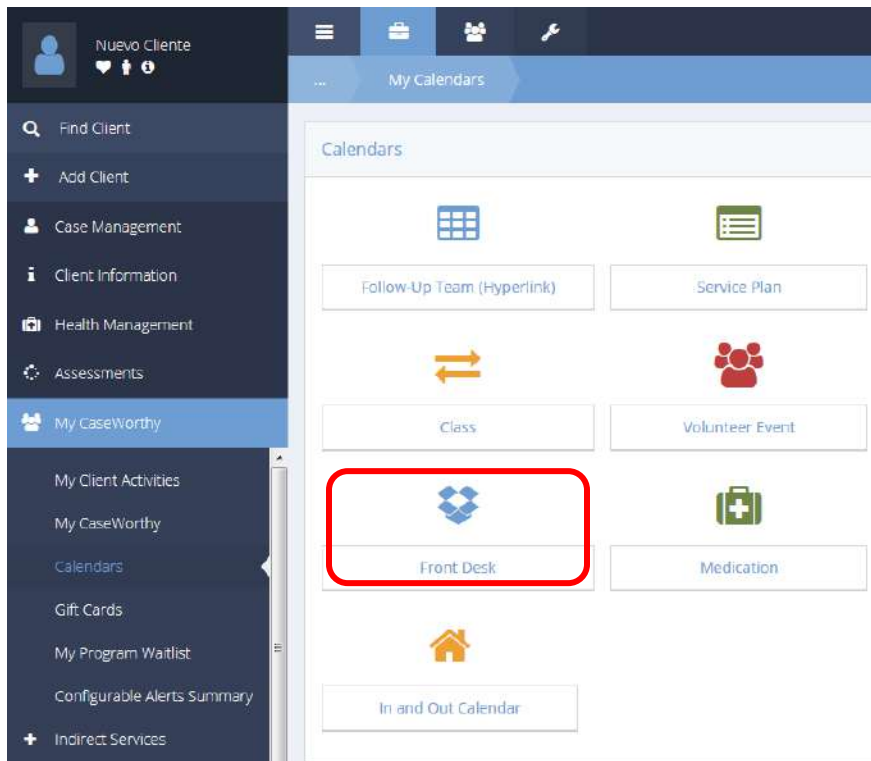
To check out a client, click Check Out. The Check out Generic form displays a list of all checked in clients.

Participant	Check Out	Signature *	Date	Pick Up Person
Kitty, Hello	9/15/2017 12:30 AM	[Handwritten Signature]	09/14/2017 Name of Signatory: dsc Signatory Role/Title: Check-In Person	

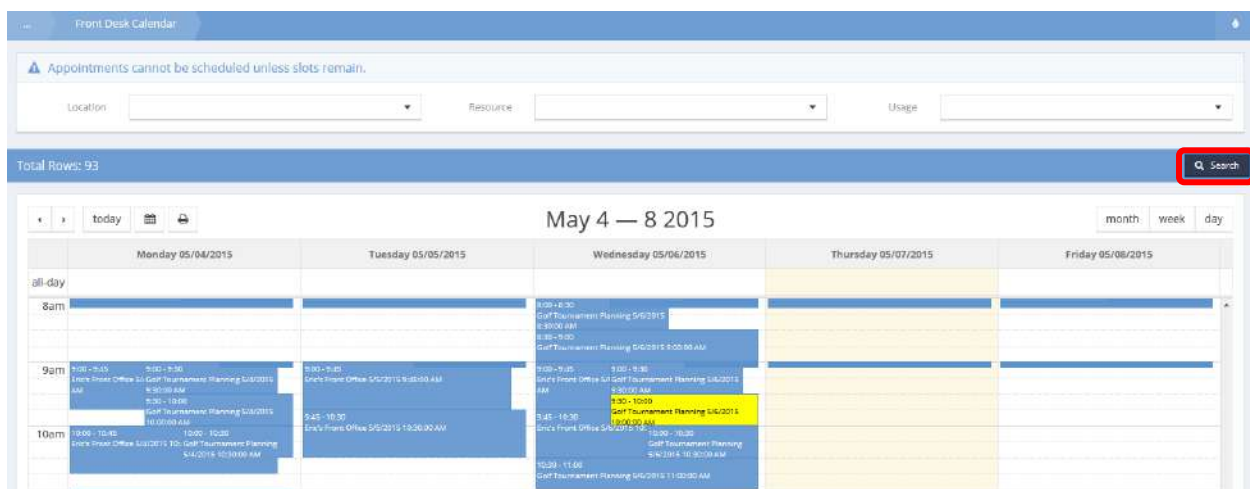
Click the date  and time  icons to adjust the check out date and time. Click the  Save button to save and close the form.


## 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.

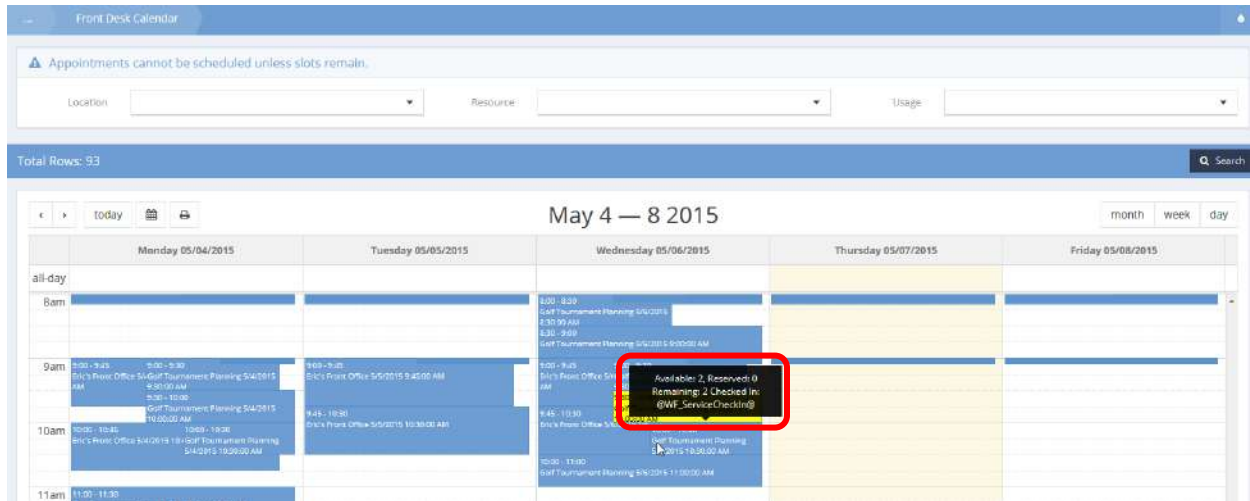


Click on the Front Desk icon on the Calendars menu. The Front Desk Calendar form displays.

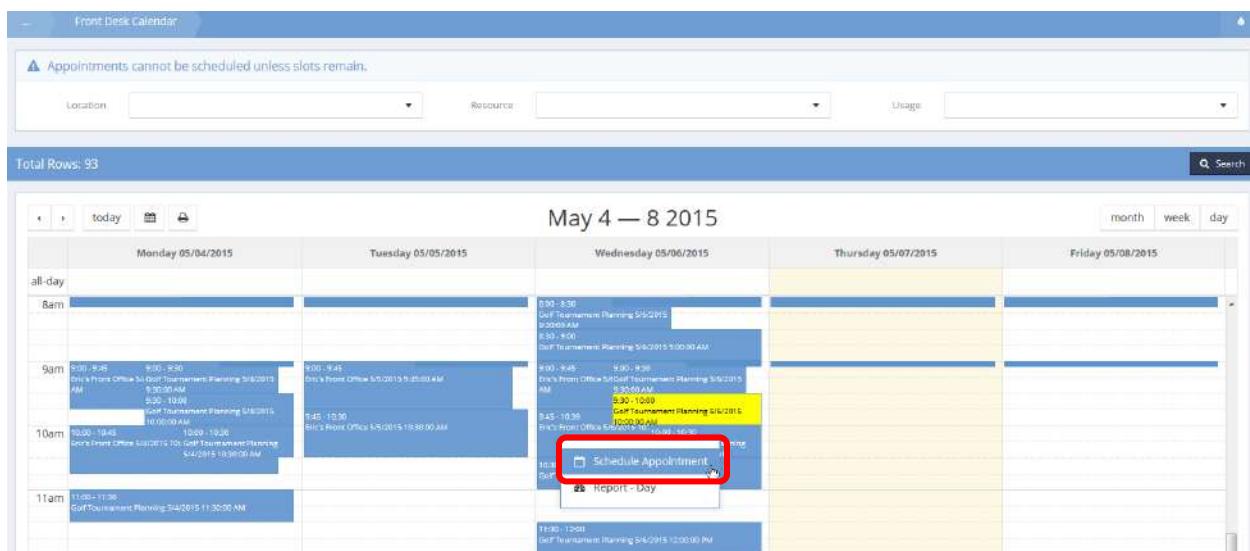


To limit the events displayed, select filter values from the three fields in the calendar header: Location, Resource and Usage. Click on the  Search button. Alter the display by date or by time frame (month, week or day).

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.

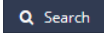
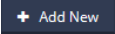


Select Schedule Appointment.

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  button. Alternatively, click on the  button to add a new client. The form displays a list of clients matching the search criteria.

Total Rows: 5

Name	Current Reserved In	Bar Program	Bar Atten Service	Bar Enroll Ser.	Birth Date	Start Date	End Date	Resource ID
Bosell, Steven Jr.					5/22/2000			
Bosell, April Jr.					4/7/2004			
Bosell, Steve	Safe Haven Section				1/22/1969	4/1/2015	Present	56
Bosell, April	Two Bedroom5				4/19/1970	4/10/2015	Present	91
Bosell, Steve	Morning				1/22/1969	4/8/2015	Present	1109

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.

Schedule Appointment

Reservations with Check-in

Participant: Besell, Steve


Start Date: 05/06/2015 09:45 a

End Date: 05/06/2015 10:30 a

☐ Check Client In?

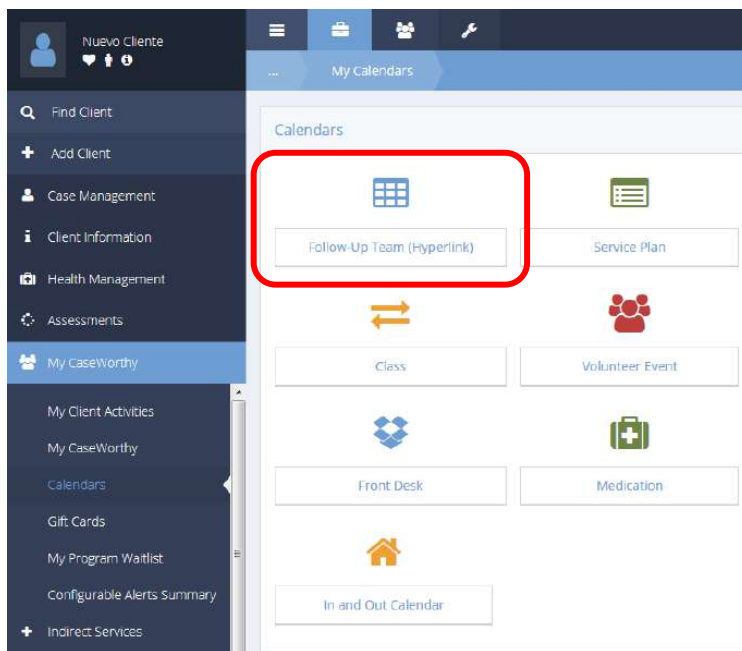
Save

Delete

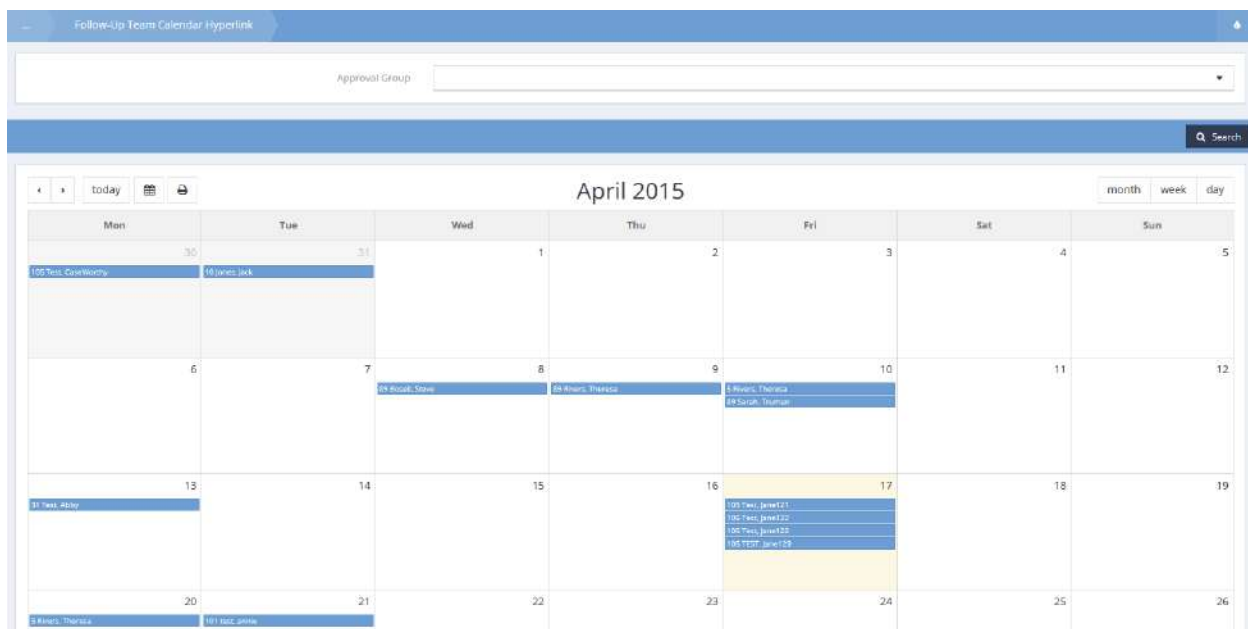
With the client name in place, alter the dates if desired. To check the client in to the service now, click on the "Check Client In?" checkbox. Click on the  Save button.

## 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.

Begin Date	End Date	Team Name	Follow-up Type	Diagnosis Codes
4/21/2015	Present	Housing Rentention	6 Month	

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

Begin Date	End Date	Team Name	Follow-up Type	Diagnosis Codes
	Present	Housing Rentention	6 Month	

The Issue Follow-up Edit form displays.

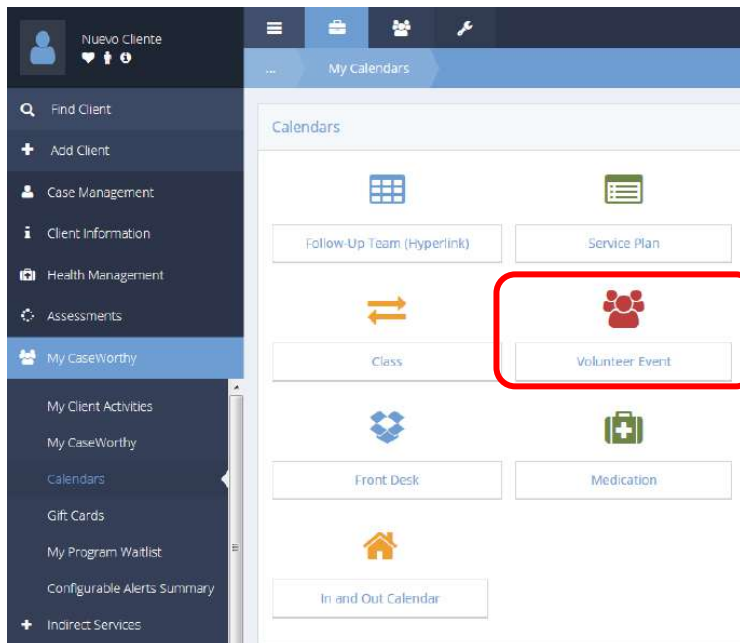
Context Type *	Diagnosis	Follow-up Type *	6 Month
Status *	Open		
Begin Date:	04/21/2015	End Date:	Present
Assigned Team *	Housing Rentention		

Record any follow up information regarding the issue and click on the Save button.

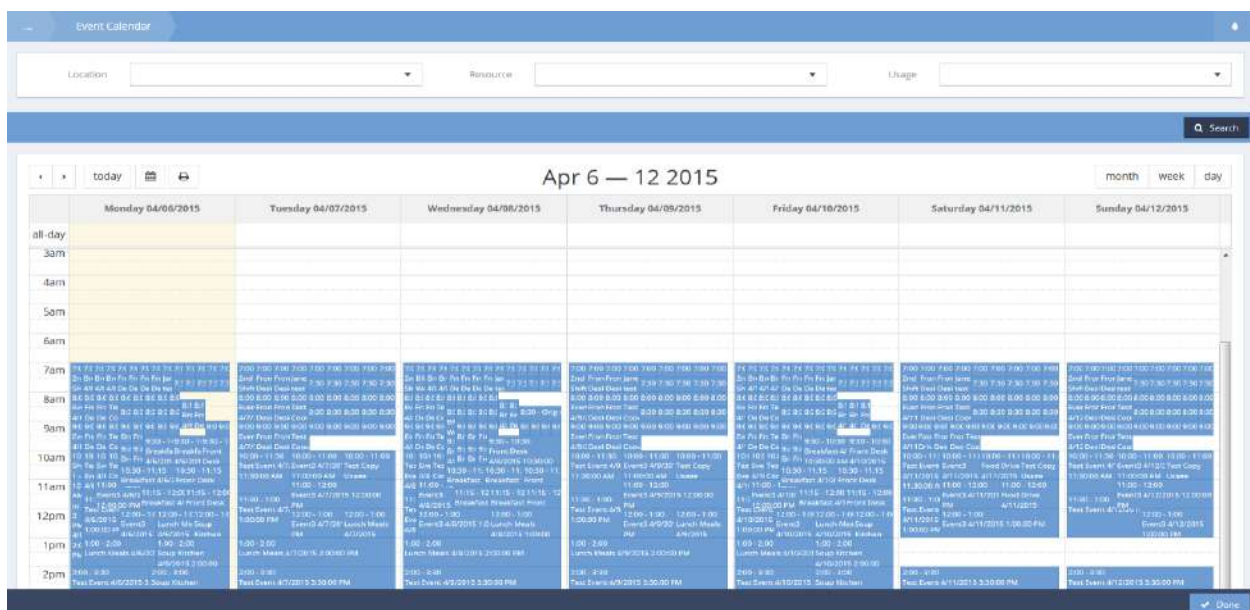


## Event Calendar

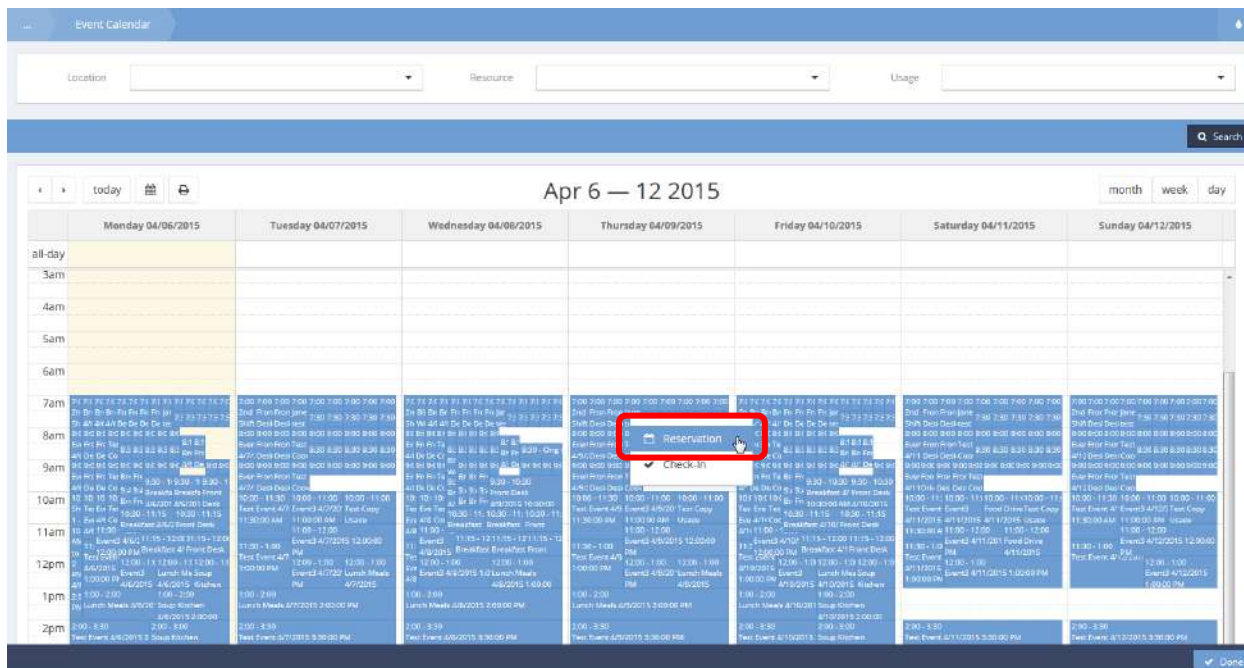
**Objective:** Make reservations and check-in participants to events.



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 **Q** 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 **Q Search** button.

Find Entry Lookup

Find Entry

Entry Type: Choose Options...

Name:

Birth Date:

Search

Select the desired participant from the list provided. Click on the  Save button.

Event Calendar

Location:  Resource:  Usage:

Search

Apr 6 — 12 2015

month week day

	Monday 04/06/2015	Tuesday 04/07/2015	Wednesday 04/08/2015	Thursday 04/09/2015	Friday 04/10/2015	Saturday 04/11/2015	Sunday 04/12/2015
all-day							
3am							
4am							
5am							
6am							
7am							
8am							
9am							
10am							
11am							
12pm							
1pm							
2pm							

Done


Select Check-In from the pop up menu. The Check-In form displays.

## Event Check in Add

Check-in

Add Event Check-in

Participant	Type *	Begin Date *	End Time	Hrs / Qty *
<input type="checkbox"/> Bosell, Steve				0.00

Click on the clear checkbox ☒ next to the participant name. Make any required changes and click on the  Save button.


Check-in

Add Event Check-in

Participant	Type *	Begin Date *	End Time	Hrs / Qty *
<input checked="" type="checkbox"/> Bosell, Steve	Regular	04/09/2015 07:00 a	04/09/2015 07:30 a	0.50

Activity: At Work Site

Time Type: Volunteer Time

Case Note  Case Note

The checkbox ☒ is now blue, indicating the participant is checked in.

Check-in

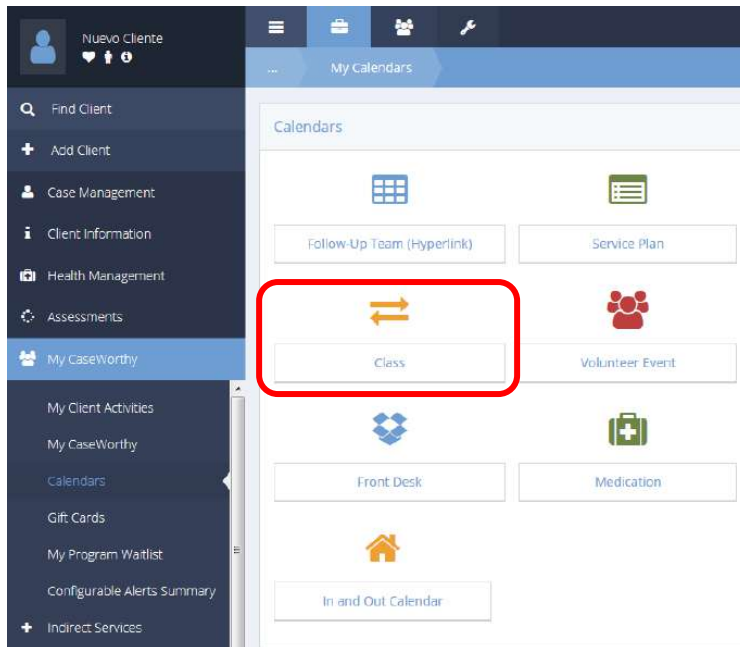
Add Event Check-in

Participant	Type *	Begin Date *	End Time	Hrs / Qty *
<input checked="" type="checkbox"/> Bosell, Steve	Regular	4/9/2015 7:00 AM	4/9/2015 7:30 AM	0.50

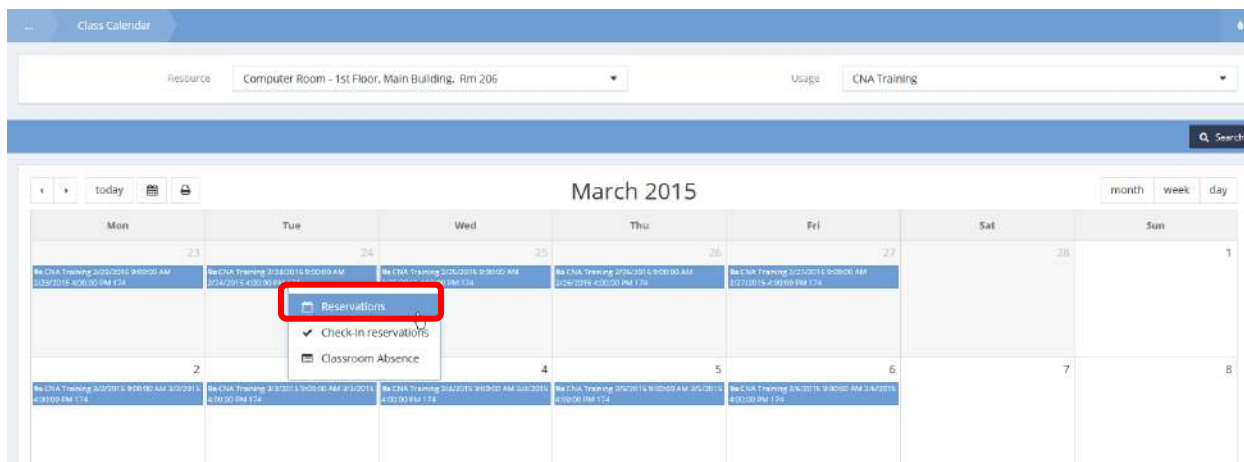
## Calendar Reservations W/ Check-In


**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 popup 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.

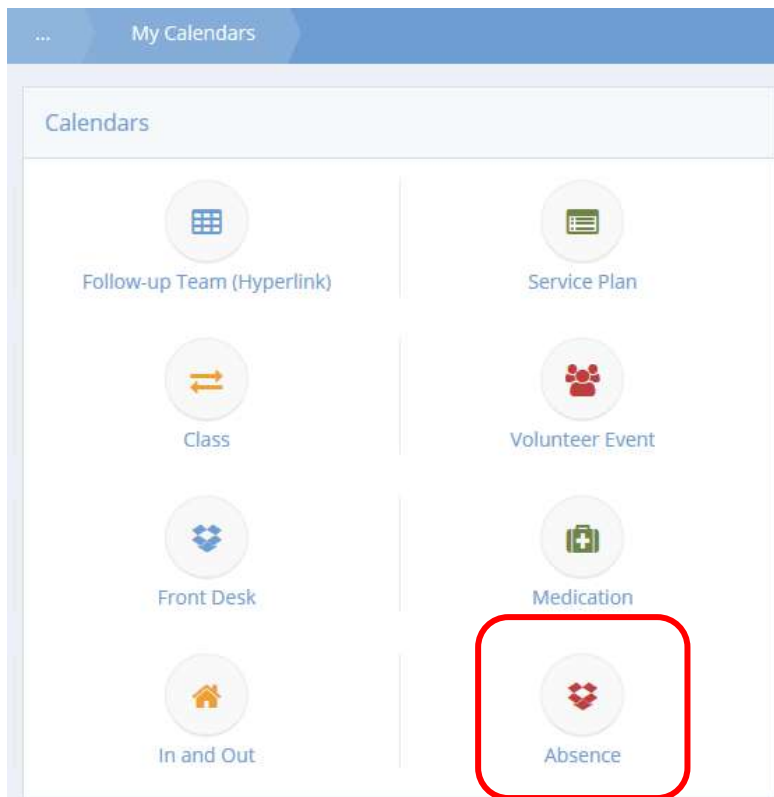
The screenshot shows the 'Reservations' form. At the top, there is a tab labeled 'Reservations with Check-in'. Below this is a date range selector for 'Reservation Date Between' from 03/29/2015 to 04/04/2015. A red box highlights the '+ Add Row' button at the top right. Below the date range, there is a section for 'Total Rows: 0'. The main form area has fields for 'Client \*', 'Start-End Date \*', and 'Check Client In?' (checkbox). There are also fields for 'Enrollment', 'Locker', and 'Locker Lookup'. A red box highlights the 'Locker' field. At the bottom, there is a 'Delete' button.

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  button to filter the calendar.

Location:  Resource:  Usage:

July 2015

Mon	Tue	Wed	Thu	Fri	Sat	Sun
29	30	1	2	3	4	5
Lima, Ashley Santiago, Aaron						
6	7	8	9	10	11	12
Lima, Ashley Santiago, Aaron						
13	14	15	16	17	18	19
Lima, Ashley Santiago, Aaron						
20	21	22	23	24	25	26
Lima, Ashley Santiago, Aaron						

To view details of an absence, click the entry and click View.

July 2015

Wed	Thu
30	1
9:22a Cliente, Nuevo	
7	8

The Absence Management (Input) form displays.



Request Begin Date/Time *	07/01/2015 09:22 a	Request 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			

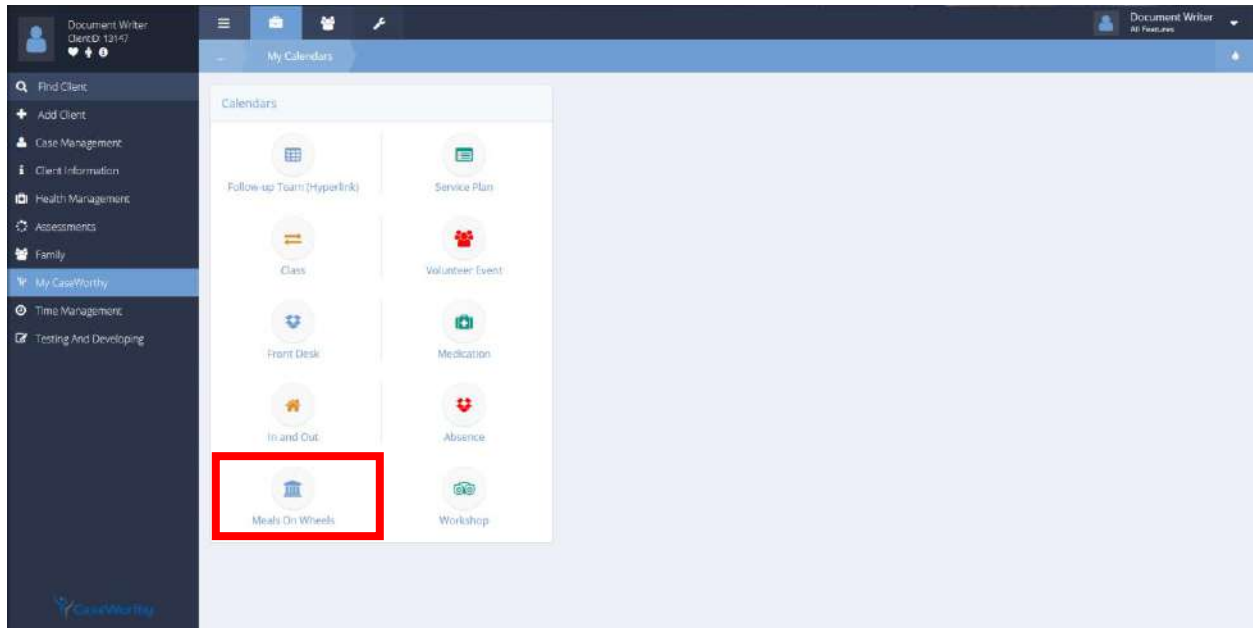
▼ Who needs to be notified about the client's leave request?

Scheduler		Program Staff	
Client Direct Supervisor		Restriction	Shared

## Meals on Wheels

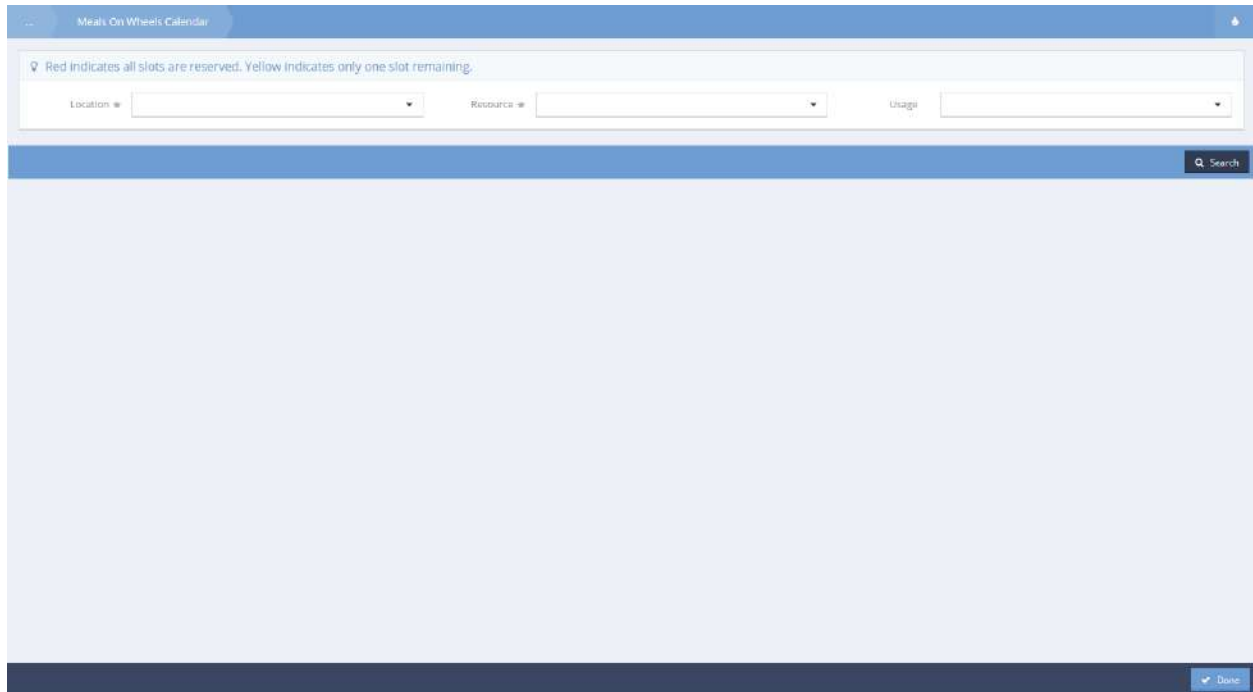
**Objective:** Manage Meals on Wheels

**Navigation:** Case Management>My CaseWorthy>Calendars




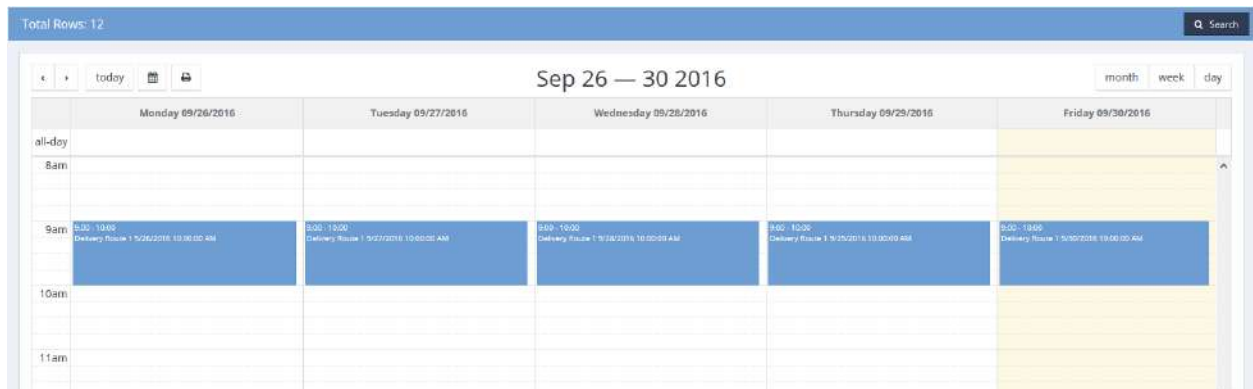
Select Meals on Wheels from the Calendars dashboard.

The Meals on Wheels Calendar form displays.



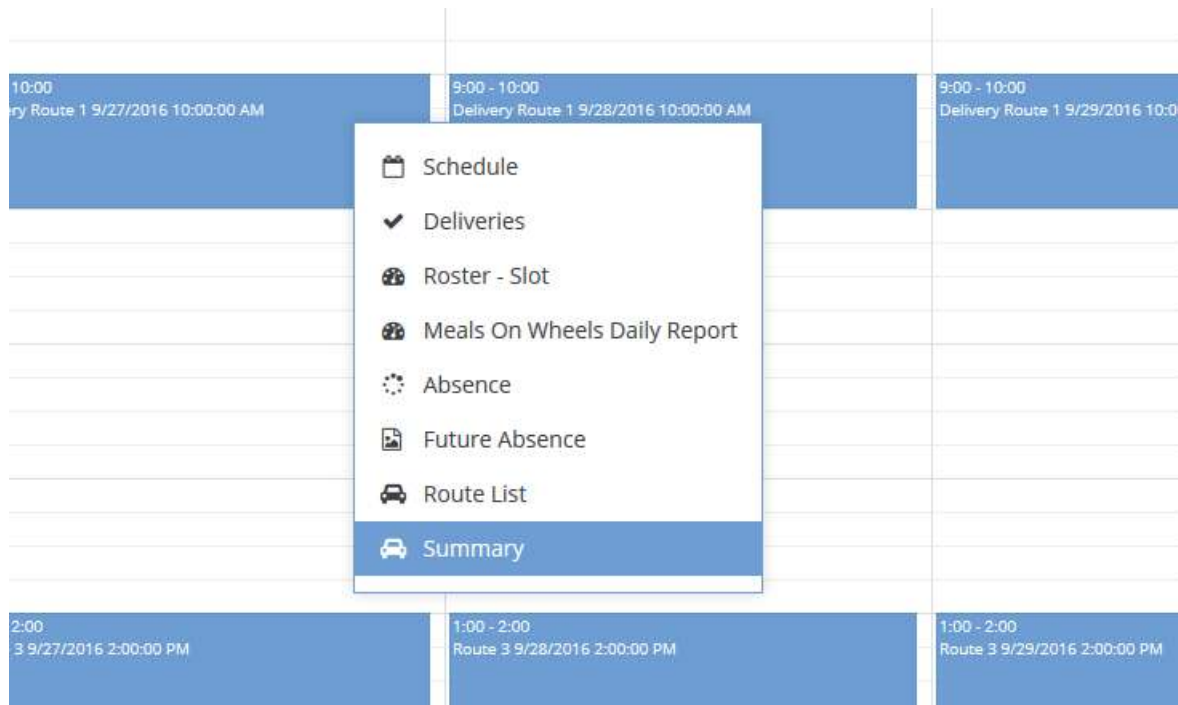
The screenshot shows the 'Meals On Wheels Calendar' form. At the top, there is a blue header bar with the title 'Meals On Wheels Calendar' and a small bell icon. Below the header, a light blue box contains a legend: 'Red indicates all slots are reserved. Yellow indicates only one slot remaining.' Underneath the legend are three dropdown menus labeled 'Location', 'Resource', and 'Usage'. To the right of these dropdowns is a 'Search' button with a magnifying glass icon. The main body of the form is a large, empty light blue area. At the bottom right, there is a 'Done' button with a checkmark icon.

Select a Location, Resource, and/or Usage if desired to filter results and click the  button to populate the list. Click the desired event and select Summary from the menu options.



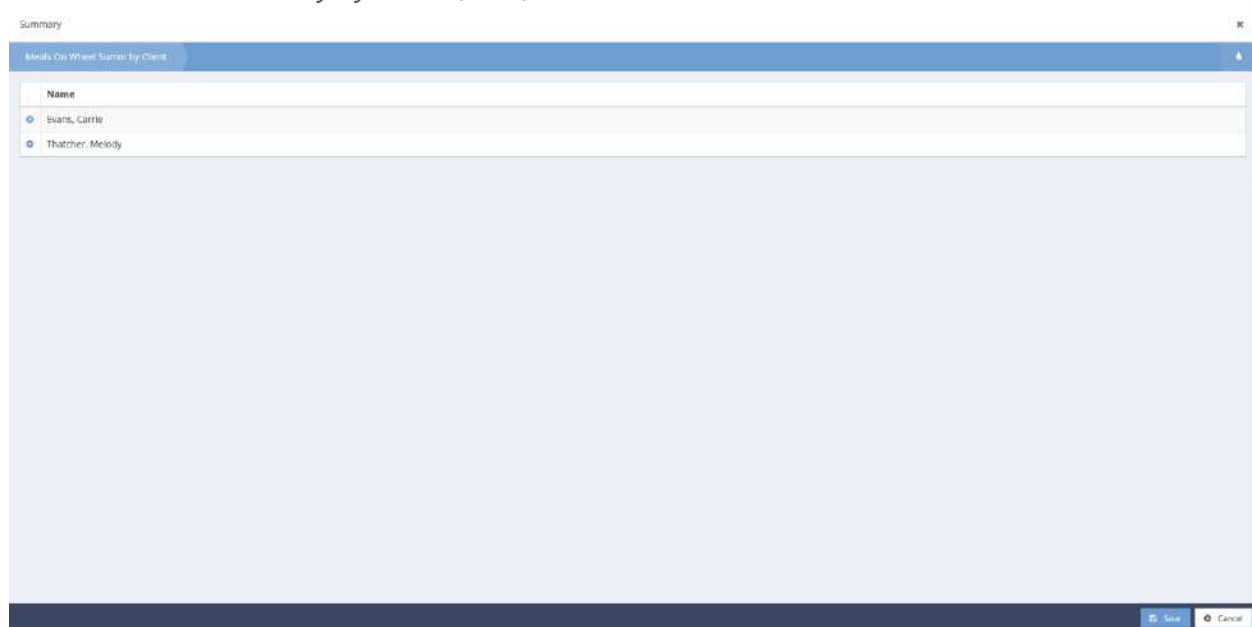
The screenshot shows the 'Meals on Wheels Calendar' view. At the top, a blue header bar displays 'Total Rows: 12' and a 'Search' button. Below the header, there is a navigation bar with 'today', a calendar icon, and a date range 'Sep 26 — 30 2016'. To the right of the date range are buttons for 'month', 'week', and 'day'. The main content is a calendar grid with columns for each day from Monday to Friday. The rows represent time slots: 'all-day', '8am', '9am', '10am', and '11am'. The '9am' row contains five blue blocks, each representing a delivery route. The '10am' and '11am' rows are empty. The 'all-day' row is empty. The '8am' row is empty. The '9am' row contains five blue blocks, each representing a delivery route. The '10am' and '11am' rows are empty. The 'all-day' row is empty. The '8am' row is empty.


	Monday 09/26/2016	Tuesday 09/27/2016	Wednesday 09/28/2016	Thursday 09/29/2016	Friday 09/30/2016
all-day					
8am					
9am	9:00 - 10:00 Delivery Route 1 9/26/2016 10:00:00 AM	9:00 - 10:00 Delivery Route 1 9/27/2016 10:00:00 AM	9:00 - 10:00 Delivery Route 1 9/28/2016 10:00:00 AM	9:00 - 10:00 Delivery Route 1 9/29/2016 10:00:00 AM	9:00 - 10:00 Delivery Route 1 9/30/2016 10:00:00 AM
10am					
11am					



The Meals On Wheels Summary by Client form displays in a new pop-up window.

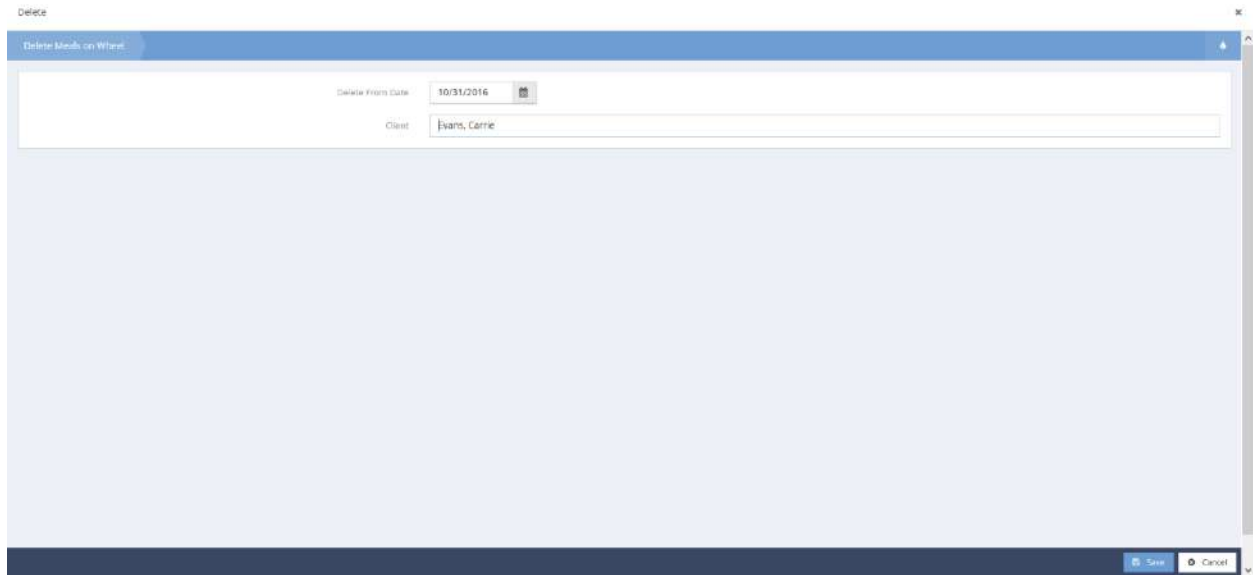
*Meals on Wheel Summary by Client (8954)*



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)*



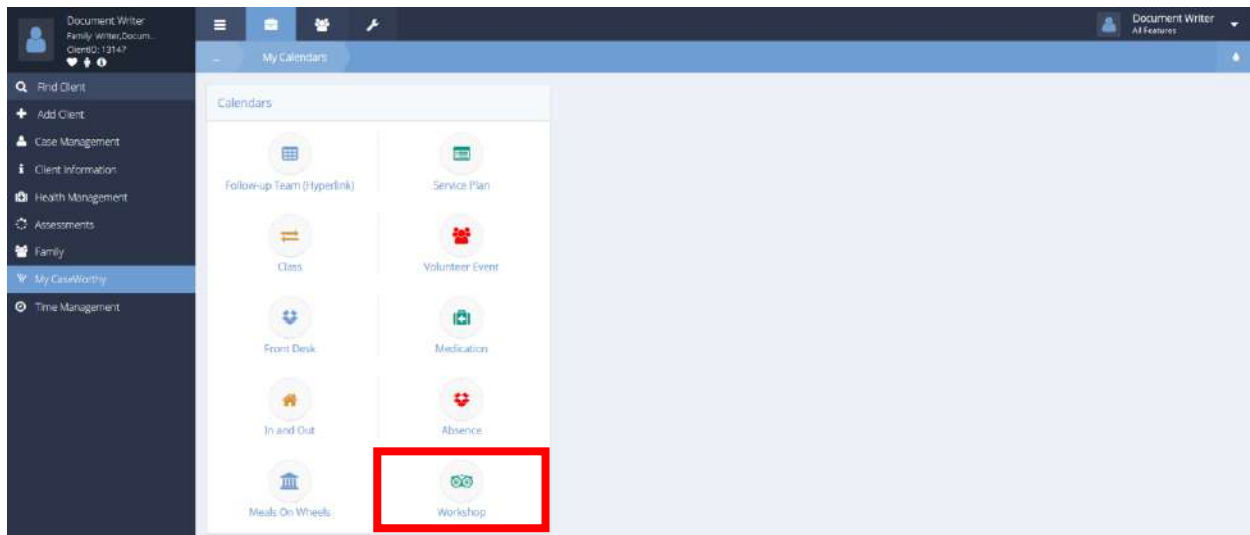
The screenshot shows a web application window titled "Delete Meals on Wheels". The window has a blue header bar with the title. Below the header, there is a form with two input fields: "Delete From Date" with the value "10/31/2016" and a calendar icon, and "Client" with the value "Evans, Carrie". The form is set against a light blue background. At the bottom right of the window, there are two buttons: "Save" (blue) and "Cancel" (white with a grey border).

Select the appropriate deletion date, click the  Save 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.

A screenshot of the 'Workshop Calendar' form. At the top, there are two red error messages: 'Provider is a required field.' and 'Resource is a required field.'. Below these, there are three dropdown menus: 'Provider', 'Resource', and 'Usage'. The 'Provider' and 'Resource' dropdown menus are highlighted with red rectangular boxes. At the bottom right of the form, there is a 'Search' button with a magnifying glass icon, which is also highlighted with a red rectangular box.

Select a Provider and Resource (and a Usage if desired). Click the  button to populate results.

The Workshop Calendar displays.

Workshop Calendar

Provider: Documentation Resource: Workshop Test Usage:

Search

August 2016

Mon	Tue	Wed	Thu	Fri	Sat	Sun
1	2	3 Sp Class 1 8/3/2016 6:00:00 PM 8/3/2016 8:30:00 PM 3070	4	5	6	7
8	9	10 Sp Class 1 8/10/2016 6:00:00 PM 8/10/2016 8:30:00 PM 3070	11	12	13	14

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.



Reservation

Calendar Reservations-Assign Slot

Client: [Search]

Usage Name	Day	Start Time	End Time
Class 1	Wednesday	18:00:00	20:30:00

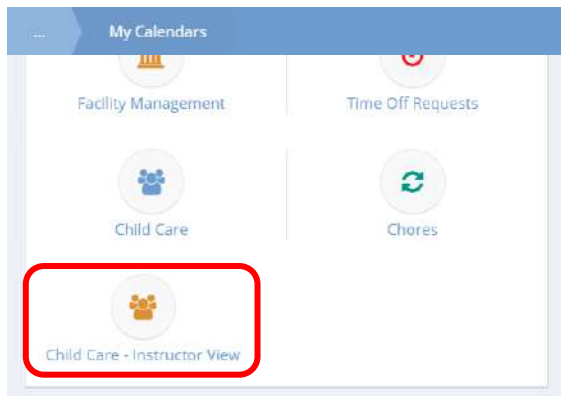
Save Cancel

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.

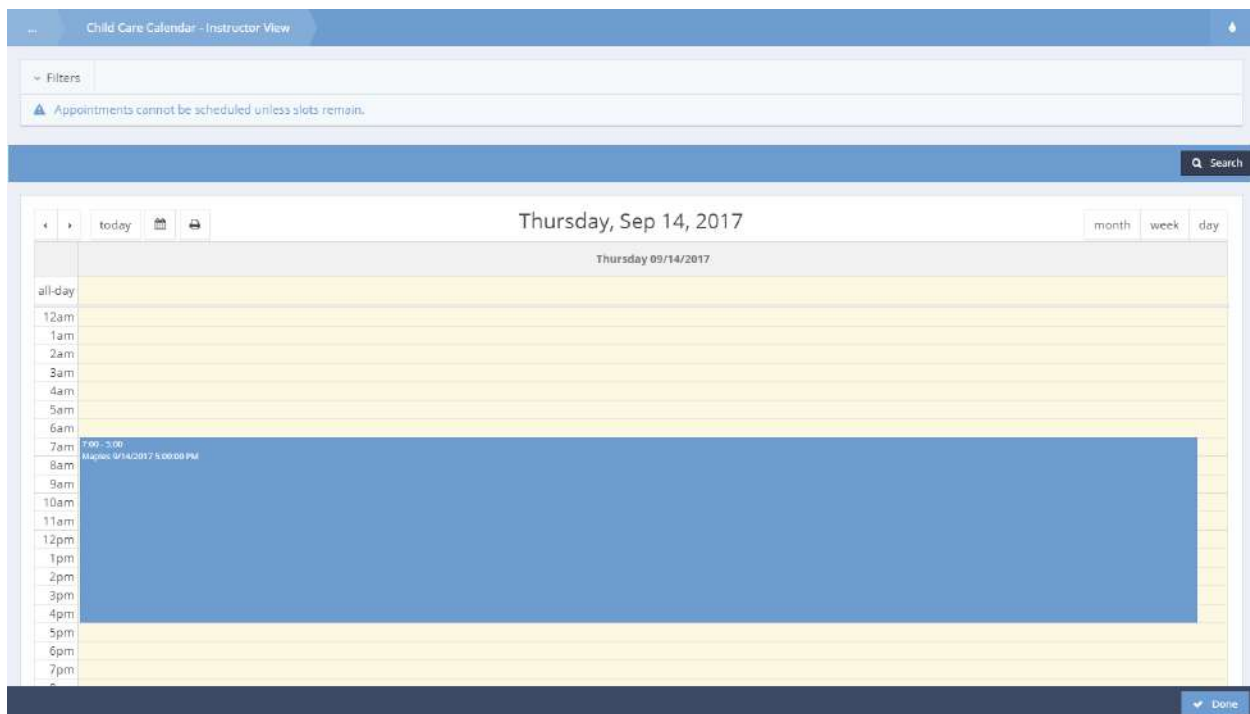
## Child Care Calendar – Instructor View

**Objective:** Instructor view of the Child Care calendar.

From the My Calendars dashboard, click on the icon labeled Child Care – Instructor View.

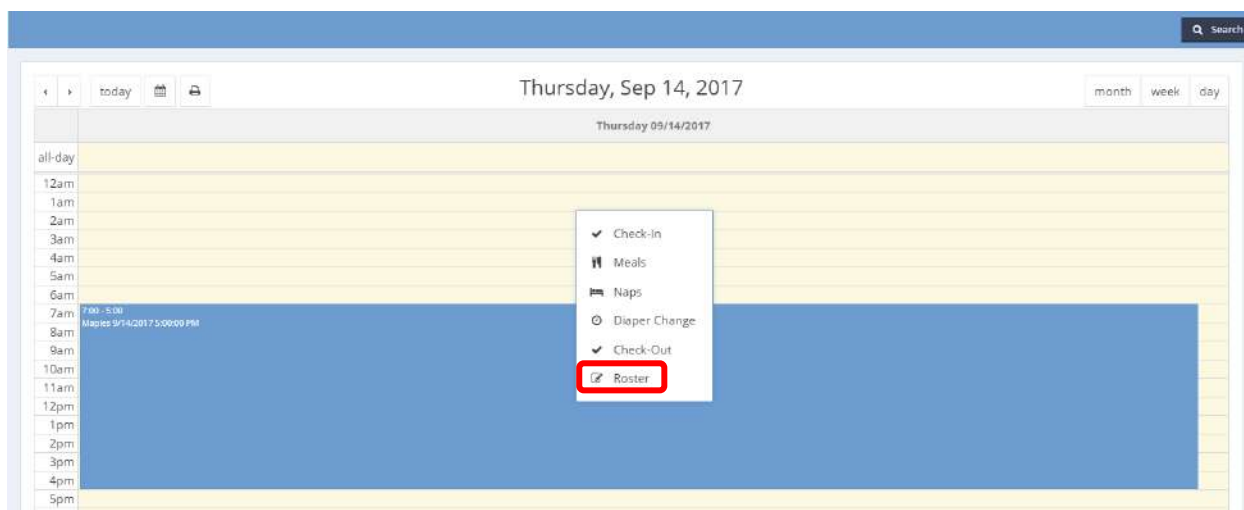


The Child Care – Instructor View Calendar appears.





Click on a class/event to view a pop-up menu.



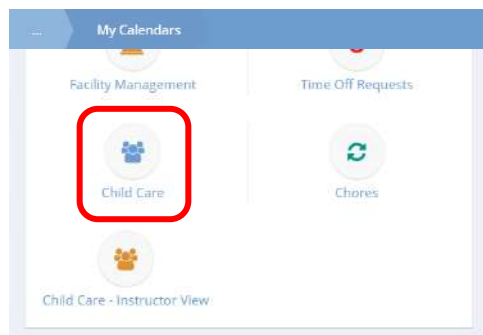
Many of the same options found on the Child Care calendar appear on this menu. Click on Roster. The Child Care Roster displays.

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	<a href="#">Photo</a>		Water - Potentially Lethal, Wheat - Potentially Lethal			
Child	Arden	1/1/2007	Kings Emerg Hs Mo	<a href="#">Photo</a>		Water - Potentially Lethal, Wheat - Potentially Lethal			
Child	Arden	1/1/2007	Test Daily All Day	<a href="#">Photo</a>		Water - Potentially Lethal, Wheat - Potentially Lethal			
Bob	Test2	1/18/2000		<a href="#">Photo</a>	Johns, Jimmie; Caputo, Giuseppe				
Sally	Sato	7/21/2013		<a href="#">Photo</a>					
CSBG test 2	test	2/2/2012		<a href="#">Photo</a>	Arden, Child; Lugo, Josie				
Rachel	Brown	6/17/2006		<a href="#">Photo</a>					
Jane512	Test	1/1/2000		<a href="#">Photo</a>					
Jason	Anderson	2/1/2013		<a href="#">Photo</a>					
Done									

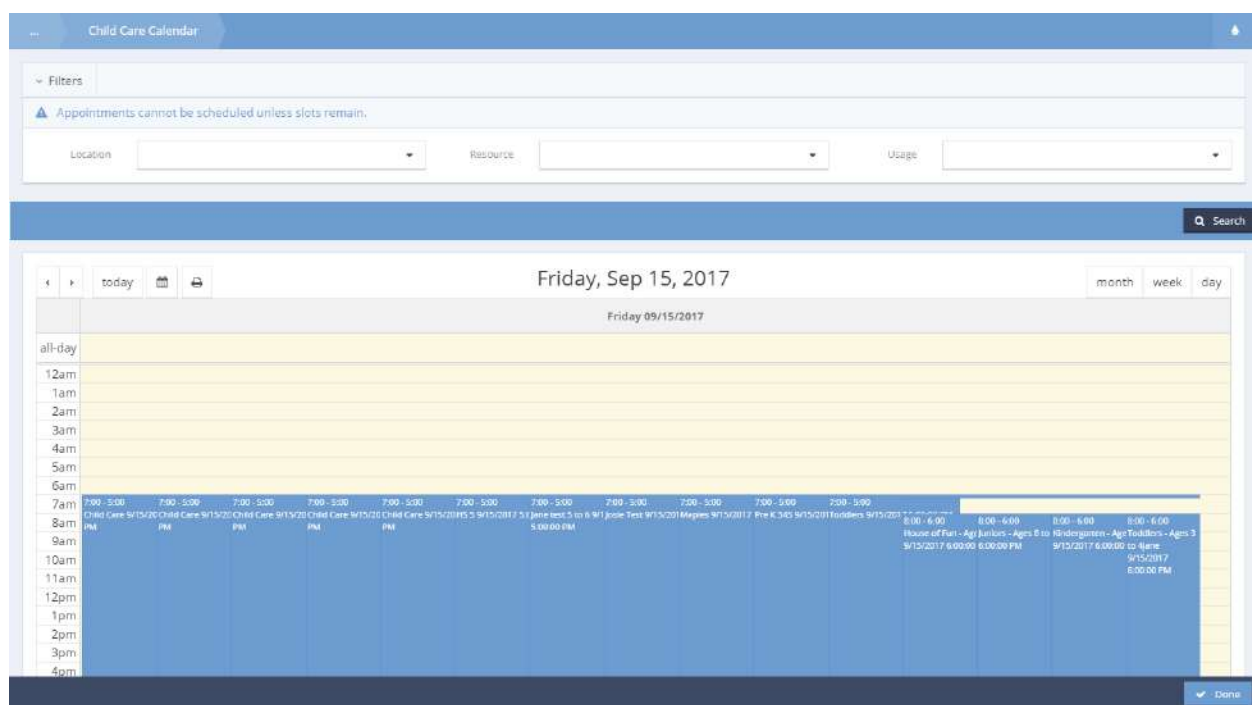
Child Care Roster allows teachers of each classroom to see a list of all children in the class, important information about each child, and when they were checked in and out for that day. Click on the [Photo](#) button to view a picture of the child. Click the [Done](#) button to close the form.

### Child Care Check-In

**Objective:** Check each child into their child care class each day.

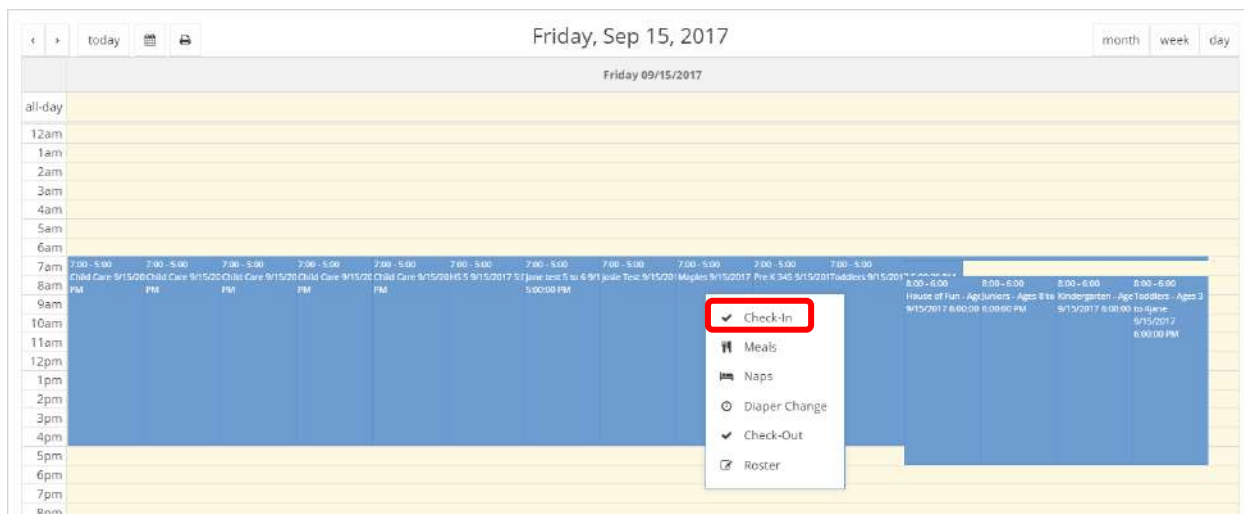


From the My Calendars dashboard, click on the icon labeled Child Care to view the Child Care calendar. The Child Care Calendar form appears.



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.

Check-In

Child Care Check-In

Filters

Check In: 09/15/2017 11:02 AM





Search

Participant	Check In	Drop off Signature *	Drop-off Person	Created By	Check Out
<input checked="" type="checkbox"/> Abbott, Banana					
<input checked="" type="checkbox"/> Allenman, Josie					
<input checked="" type="checkbox"/> Allenman, Josie					
<input checked="" type="checkbox"/> Anderson, Jason					
<input checked="" type="checkbox"/> Arden, Child					
<input checked="" type="checkbox"/> Bigredog, Clifford					
<input checked="" type="checkbox"/> Brown, Rachel					
<input checked="" type="checkbox"/> Gonzales, Maria					
<input checked="" type="checkbox"/> Grayson, Daniel					

Save Cancel

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.

Child Care Check-in						
Participant	Check In	Drop off Signature *	Drop-off Person	Created By	Check Out	
<input checked="" type="checkbox"/> Abbott, Banana						
<input checked="" type="checkbox"/> Allemen, Josie						
<input checked="" type="checkbox"/> Allemen, Josie						
<input checked="" type="checkbox"/> Anderson, Jason						
<input checked="" type="checkbox"/> Arden, Child						
<input checked="" type="checkbox"/> Bigredog, Clifford	09/15/2017  11:02 AM 	<a href="#">Add Signature</a>	<input type="text"/> 	doc	12/31/9999 	

# of Diapers:

# of Bottles:

Jar Food:

Change of Clothes:




Other Bag Contents:

Child Inspection:

Formula Used:

Parent Location:

Medications:

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.

Child Care Pick-Up Select		
Pick up person	Begin Date	End Date
Johns, Jimmie	6/9/2017	Open

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.

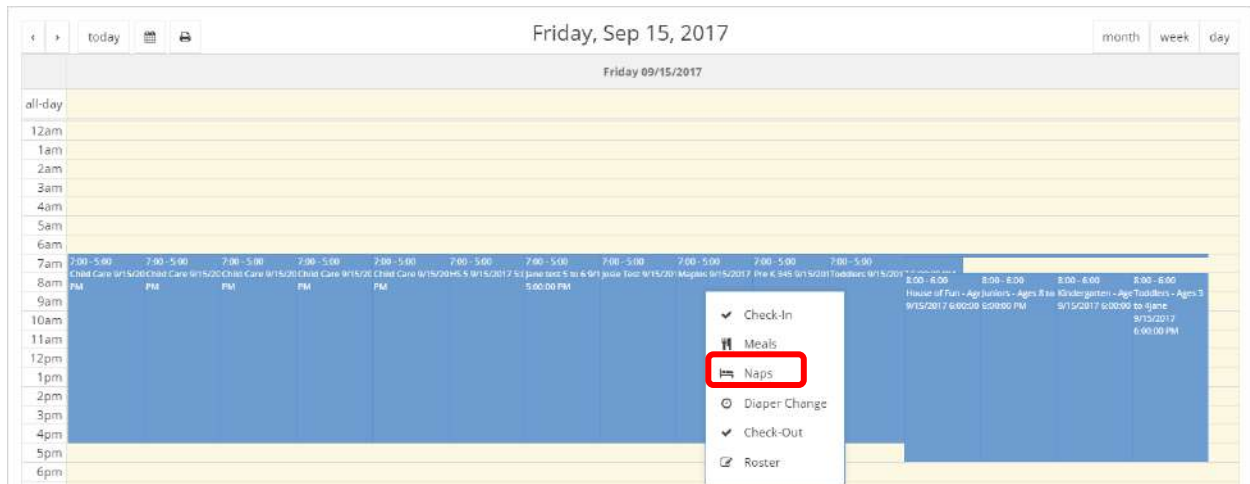
Select a meal from the drop-down menu. Adjust the meal time by clicking the date and time icons. Click the button. A list of checked in clients appears with the selected meal type next to their name.

Participant	Meal Date and Time	Meal *	Created By
<input type="checkbox"/> Kelly, Katie		Lunch	
<input type="checkbox"/> Breeding, Clifford		Lunch	

Click the ☐ icon next to the desired client. The check box turns blue ☒ and the row expands.

<input checked="" type="checkbox"/> Kelly, Katie	09/15/2017 1:02 PM	Lunch	abc
Food Type and Amount: <input type="text"/>			
<input type="checkbox"/> Breeding, Clifford		Lunch	

Fill in any desired information and click the button. The form closes and the user is returned to the Child Care Calendar. Upon re-entry to the Meals form, the meal will display after the button is selected.





## Child Care Naps

Select Naps from the menu. The Naps Summary form appears.

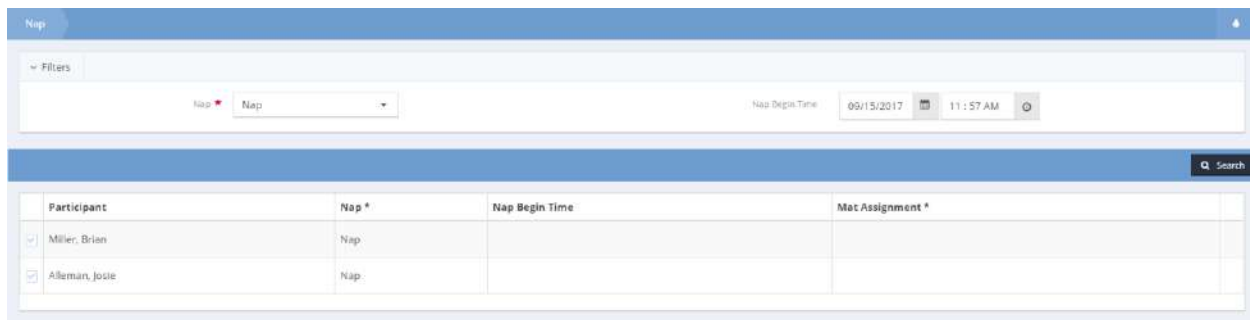


Click the **+ Add New** button to record a new nap. The Nap form appears.



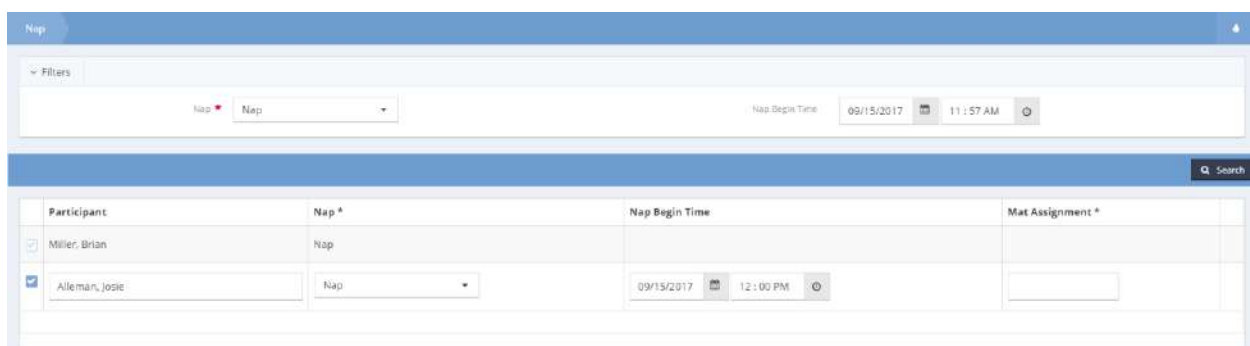
Select Nap from the drop-down menu and adjust the date or time by clicking on the date  and time  icons.

Click the  Search button to view a list of all checked in clients.




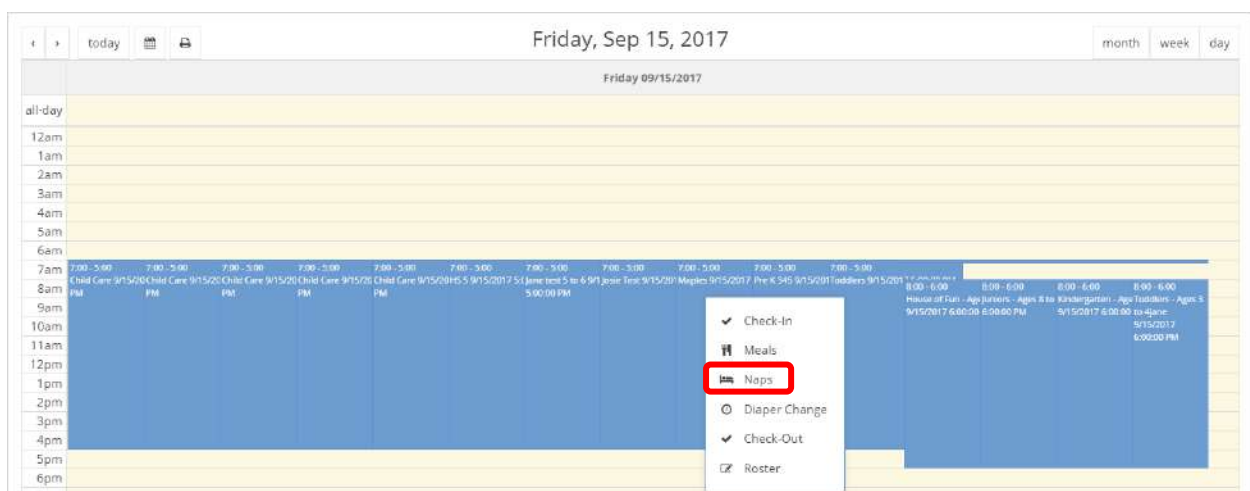
Participant	Nap *	Nap Begin Time	Mat Assignment *
Miller, Brian	Nap		
Alleman, Josie	Nap		

Select a client by clicking the ☐ icon to record a Nap. The checkbox turns blue ☒ and the row expands.



Participant	Nap *	Nap Begin Time	Mat Assignment *
Miller, Brian	Nap		
Alleman, Josie	Nap	09/15/2017 12:00 PM	

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.

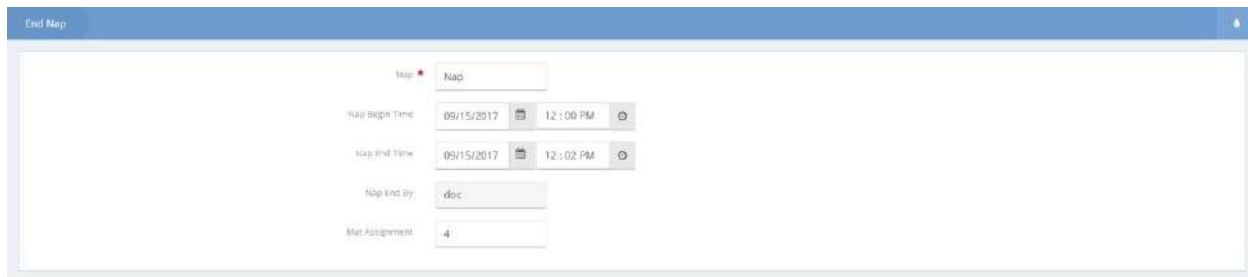


Naps


Nap Summary

	Service Begin Date	Service End Date	Mat Assignment	Nap Start By	Nap End By
<input checked="" type="checkbox"/> End Nap <input type="checkbox"/> Edit Nap	7/5/2017 11:05 AM	Open	4	Writer, Document	

Click the action gear  icon. A pop-up list appears. Click End Nap. The End Nap form appears.



End Nap




Nap  Nap

Nap Begin Time: 09/15/2017 12:00 PM

Nap End Time: 09/15/2017 12:02 PM

Nap End By: doc

Mat Assignment: 4

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  button to save the form and return to the Nap Summary form.

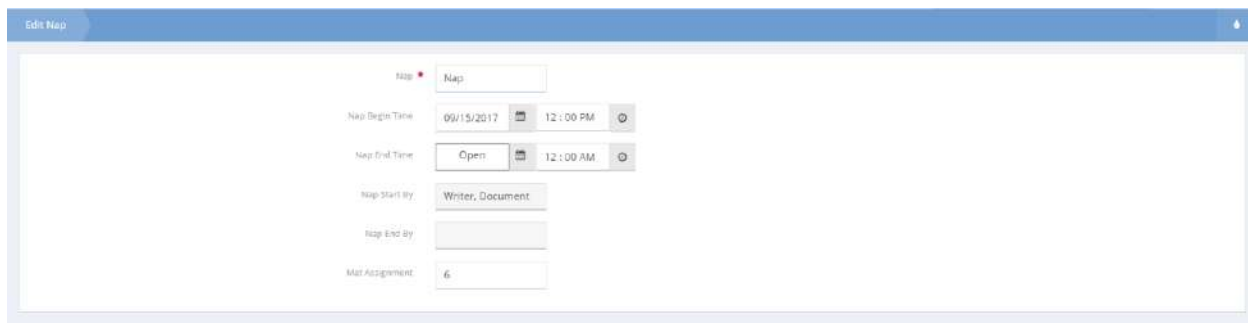


Naps


Nap Summary

	Service Begin Date	Service End Date	Mat Assignment	Nap Start By	Nap End By
<input checked="" type="checkbox"/> End Nap <input type="checkbox"/> Edit Nap	7/5/2017 11:05 AM	Open	4	Writer, Document	

To edit a nap, click Edit Nap from the pop-up menu under the Nap Summary form. The Edit Nap form appears.



Edit Nap

Nap  Nap



Nap Begin Time: 09/15/2017 12:00 PM

Nap End Time: Open 12:00 AM

Nap Start By: Writer, Document

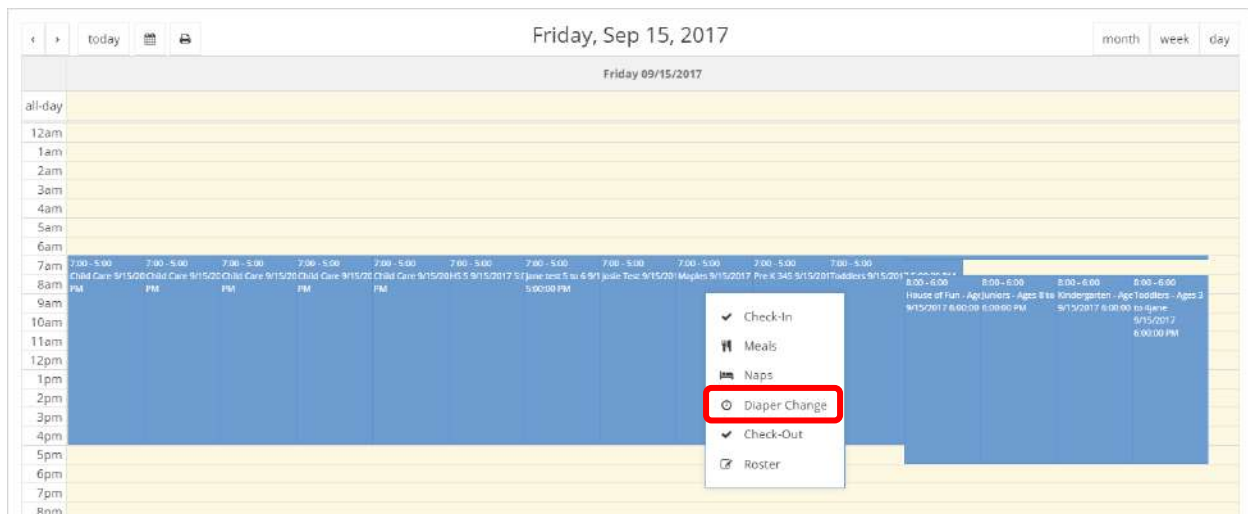
Nap End By:

Mat Assignment: 6

Edit the Nap field, begin time, end time, or mat assignment. Click the  button to save the form and return to the Child Care Calendar. Click the  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.

Diaper Change

Filters

Diaper Change \*

Diaper Change

Diaper Change Time

06/15/2017

5: 05 AM

Participant

Diaper Change \*


Diaper Change Time

UR/BM

Diaper Cream/Ointment

Created By

<input checked="" type="checkbox"/>	Miller, Brian	Diaper Change				
<input checked="" type="checkbox"/>	Alleman, Josie	Diaper Change	06/14/2017 11: 06 AM			doc


Enter information by using the drop-down menus. Click the  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.

Participant	Check Out	Pick Up Person	Pick Up Signature *
<input checked="" type="checkbox"/> Kitty, Hello	9/14/2017 5:00 PM		
<input checked="" type="checkbox"/> Bigred dog, Clifford	9/14/2017 5:00 PM		
<input checked="" type="checkbox"/> Miller, Brian			
<input checked="" type="checkbox"/> Alleman, Josie			

Select the  icon next to the client's name to check out a client. The row expands.

Participant	Check Out	Pick Up Person	Pick Up Signature *
<input checked="" type="checkbox"/> Kitty, Hello	9/14/2017 5:00 PM		
<input checked="" type="checkbox"/> Bigred dog, Clifford	9/14/2017 5:00 PM		
<input checked="" type="checkbox"/> Miller, Brian	09/14/2017 11:10 AM	<input type="text"/>	<button>Add Signature</button>
<button>Notes</button>			
<input checked="" type="checkbox"/> Alleman, Josie	09/14/2017 11:10 AM	<input type="text"/>	<button>Add Signature</button>
<button>Notes</button>			

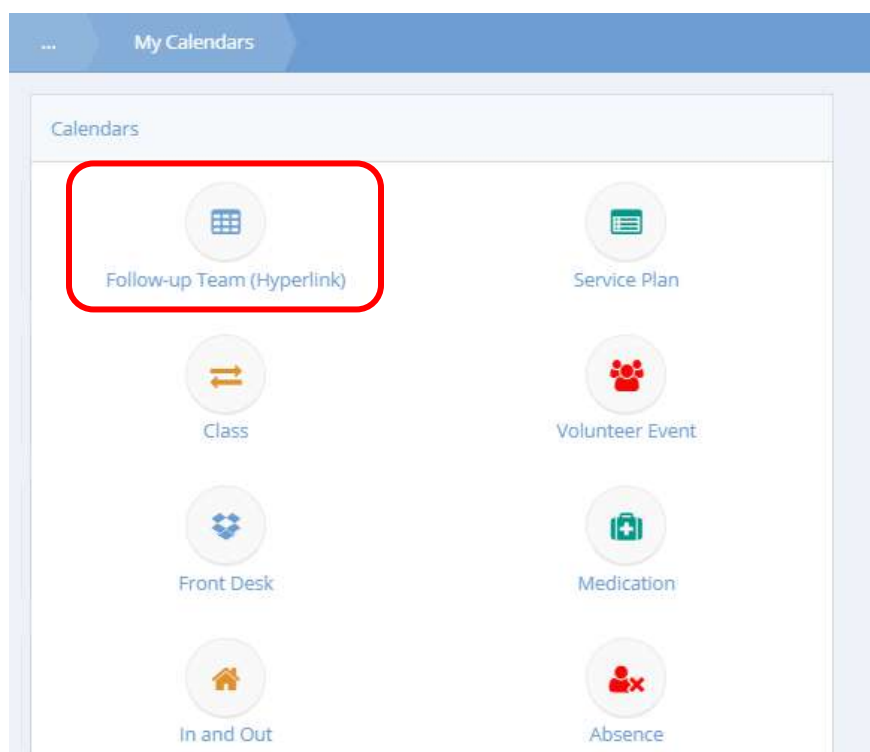
Adjust date and time by clicking the date  and time  icons. Add a check out signature by clicking the Add Signature button. Look up a check out person by clicking the  icon. To add a case note, click the  Notes button. Click the  Save button to finish check out and return to the Child Care Calendar.

## 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.

The screenshot shows the 'Follow-Up Team Calendar Hyperlink' form. At the top, there is a blue header bar with the title 'Follow-Up Team Calendar Hyperlink' and a search icon. Below the header, there is a 'Filters' section with a dropdown menu for 'Approval Group'. The main area is a calendar for October 2017, with days of the week (Mon, Tue, Wed, Thu, Fri, Sat, Sun) and dates (1-22) visible. A 'Search' button is located in the top right corner. At the bottom right, there is a 'Done' button.

A follow up appointment has already been scheduled for October 21<sup>st</sup>. 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.


This screenshot shows the same 'Follow-Up Team Calendar Hyperlink' form, but with the 'Approval Group' dropdown menu set to 'Work Therapy Team'. The calendar for October 2017 is displayed. A pop-up menu is visible over the date 21, showing the text 'Feeding instructions'. The 'Done' button is still present at the bottom right.


Click on Feeding Instructions. The Feeding Instructions Followup form displays.


Feeding Instructions Followup		
Total Rows: 1		
Begin - End Follow Up	Context	Team Name
10/21/2017 - Open	Assess Feeding Instructions	


Click on the action gear  icon. A pop-up menu displays.

Feeding Instructions Followup		
Total Rows: 1		
Begin - End Follow Up	Context	Team Name
10/21/2017 - Open	Assess Feeding Instructions	



 Edit

 Feeding Instructions Assessment

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

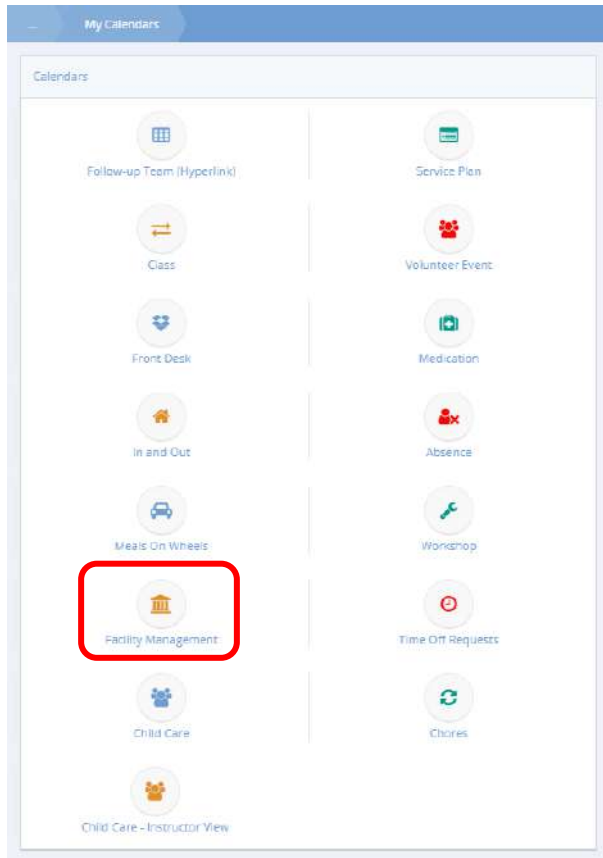
The screenshot shows the CaseWorthy client dashboard for Mitch Wrapp (ClientID: 2119). The left sidebar contains a list of navigation options. The 'Calendars' option is highlighted with a red box. The main content area displays client information, including last name 'Wrapp', birth date '12/01/1988', gender 'Male', and email 'thorst@caseworthy.com'. Below this, there is a 'Client Alerts' table with columns for Date, Summary, Severity, and User Name. The table contains three alerts: a test alert from 12/24/2011, an alteration in the housing facility from 08/19/2013, and a color rules testing alert from 10/26/2015. At the bottom, there is a 'Bulletin Board Notifications' section with a notification dated 05/23/2013 regarding a service request.

Date	Summary	Severity	User Name
12/24/2011	This is a Test Alert for Mitch Wrap	Informational	Brian
08/19/2013	Altercation in the Housing Facility - Want to speak with Mitch Wrap	Important	Brian
10/26/2015 10:02 AM	Color Rules testing	Critical	Dale

***** Bulletin Board Notifications *****	
Date	Notification
05/23/2013	Service Request - Pending Approval

Under the Case Management tab, select Calendars.

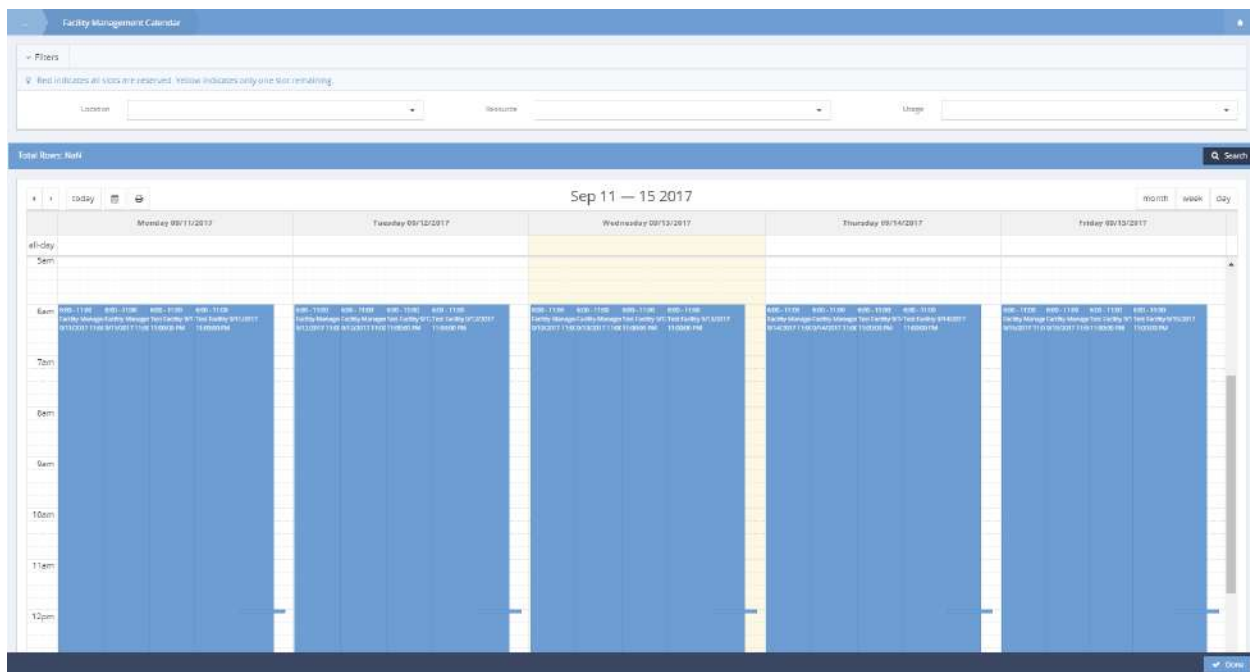
The Calendars Dashboard displays.



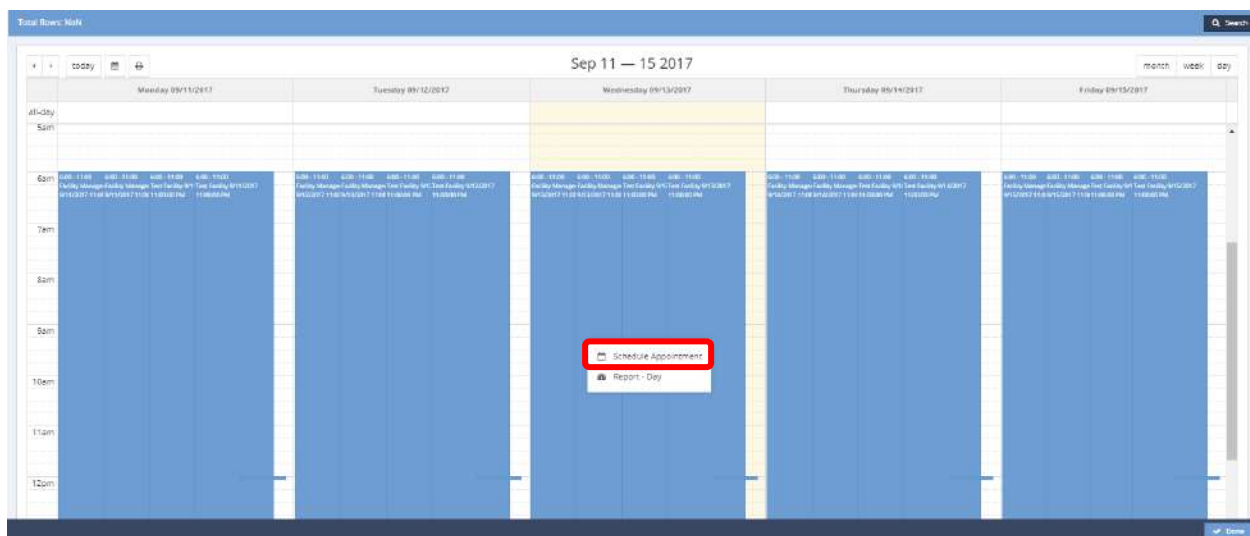
Click the Facility Management icon.



The Facility Management Calendar displays.

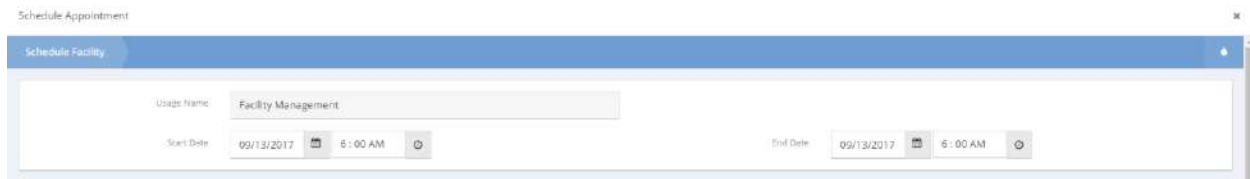


To schedule an appointment click on an event. A pop-up menu appears.



Select Schedule Appointment.




The Schedule Appointment form appears.



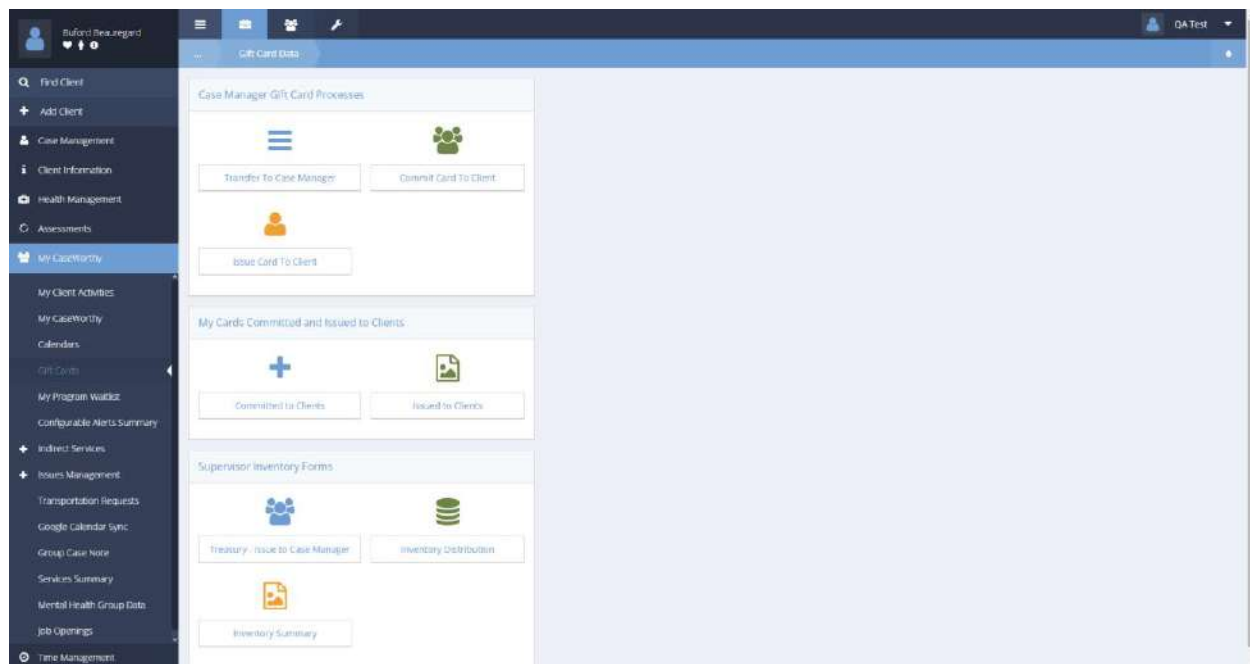
The screenshot shows a web application window titled "Schedule Appointment". Inside the window, there is a blue header bar with the text "Schedule Facility" and a close button. Below the header, there is a form with the following fields:

- Usage Name:** A text input field containing "Facility Management".
- Start Date:** A date picker showing "09/13/2017" with a calendar icon.
- Start Time:** A time picker showing "6:00 AM" with a clock icon.
- End Date:** A date picker showing "09/13/2017" with a calendar icon.
- End Time:** A time picker showing "6:00 AM" with a clock icon.

At the bottom right of the form, there is a blue button with a floppy disk icon and the text "Save".

Adjust the Start and End dates and times by clicking the date  and time  icons. Click the  button to save the appointment and return to the Facility Management Calendar.

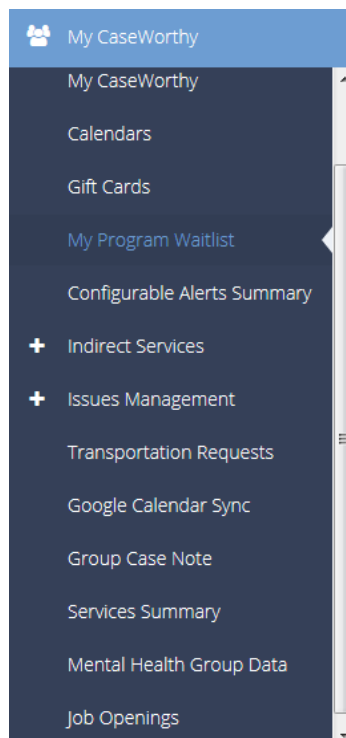
## Gift Cards



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.

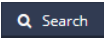
There are also links on the lower portion of the dashboard that can be placed on supervisor roles that allow for approval processes to be put into place prior to gift card assignments or transfers.

## My Program Waitlist


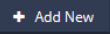


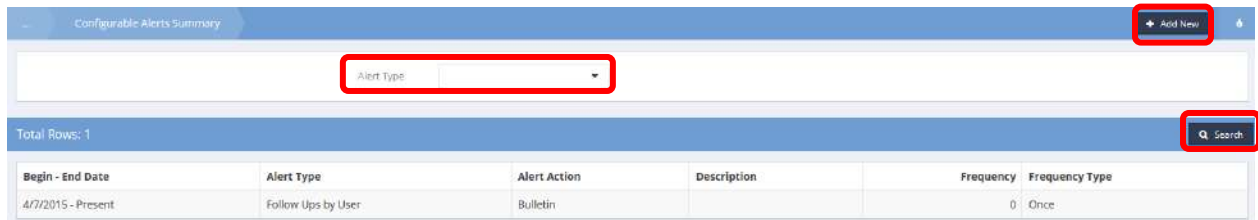
The next item on the My CaseWorthy menu is the My Program Waitlist form. This form is used to search for a list of clients on specific program waitlists.

A screenshot of the 'Provider Side Program Wait List by Program' form. The form has a blue header bar with the title 'Provider Side Program Wait List by Program' and a user icon. Below the header is a search area with two date pickers for 'Effective Date' (showing 05/07/2015) and a 'Program Name' dropdown. Below the search area is a blue bar with 'Total Rows: 0' and a 'Search' button with a magnifying glass icon. Below the search bar is a table with the following columns: 'Wait List Date', 'Effective Date', 'Program Name', 'Organization Name', 'Client', and 'Case Note'.


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.



Configurable Alerts Summary

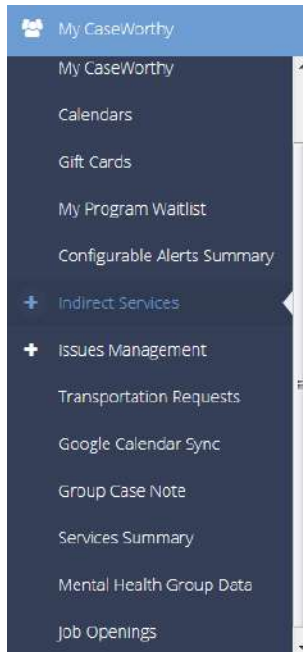


Alert Type 

Total Rows: 1 

Begin - End Date	Alert Type	Alert Action	Description	Frequency	Frequency Type
4/7/2015 - Present	Follow Ups by User	Bulletin		0	Once

## Indirect Services



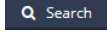
The next menu item in the My CaseWorthy menu group is the "Indirect Service" summary form. This form displays all of the indirect services a specific organization has provided.

**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.**

A screenshot of the 'Indirect Service Summary' form. At the top right is a '+ Add New' button. Below it is a date range selector with 'Service Date' and 'to'. A blue bar indicates 'Total Rows: 0' with a search icon. Below is a table with columns: Service Date, End Date, Service, Unit of Measure, Units, Unit Value, and Total.

From the Indirect Service Summary, click the **+ Add New** button. The Add Indirect Service form displays.


A screenshot of the 'Add Indirect Service' form. It features a 'Program' dropdown menu highlighted with a red box. At the bottom right is a search icon.










Choose a program from the drop-down list. Click the  button.



The list of matching services displays.


Indirect Service (Add)

Program: Indirect Service




	Begin Date	Service	U of M	Units *	Unit Value *	Total
		Education	Each		1.00	\$1.00
		Education	Each		1.00	\$1.00
		Indirect Clothing	Each		1.00	\$1.00
		Indirect Food	Each		1.00	\$1.00
		Indirect Material Goods Testorg	Each		5.00	\$5.00
		Information & Referral	Each		1.00	\$1.00
		Community Education	Each		1.00	\$1.00
		Bus Tokens	Each		1.00	\$1.00
		Test Indirect	Each		1.00	\$1.00











 



Click the clear checkbox  to add a service. The row expands.


Indirect Service (Add)

Program: Indirect Service



	Begin Date	Service	U of M	Units *	Unit Value *	Total
		Education	Each		1.00	\$1.00
	01/02/2015 	Education	Each	1	1.00	\$1.00
		Indirect Clothing	Each		1.00	\$1.00
		Indirect Food	Each		1.00	\$1.00
		Indirect Material Goods Testorg	Each		5.00	\$5.00
		Information & Referral	Each		1.00	\$1.00
		Community Education	Each		1.00	\$1.00
		Bus Tokens	Each		1.00	\$1.00
		Test Indirect	Each		1.00	\$1.00

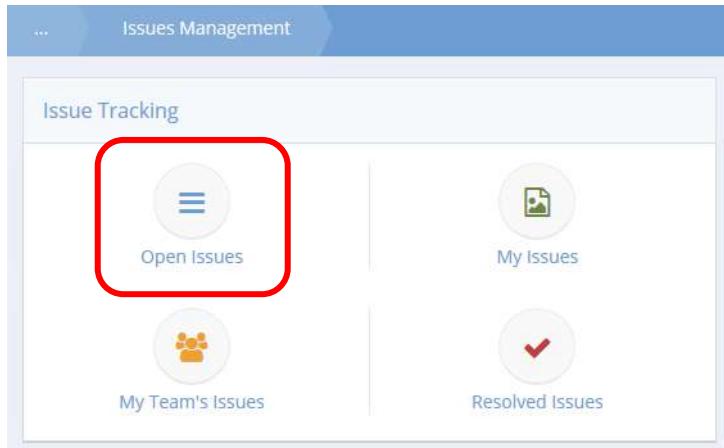
 

Enter the units and unit value. Click  when finished.

## 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.

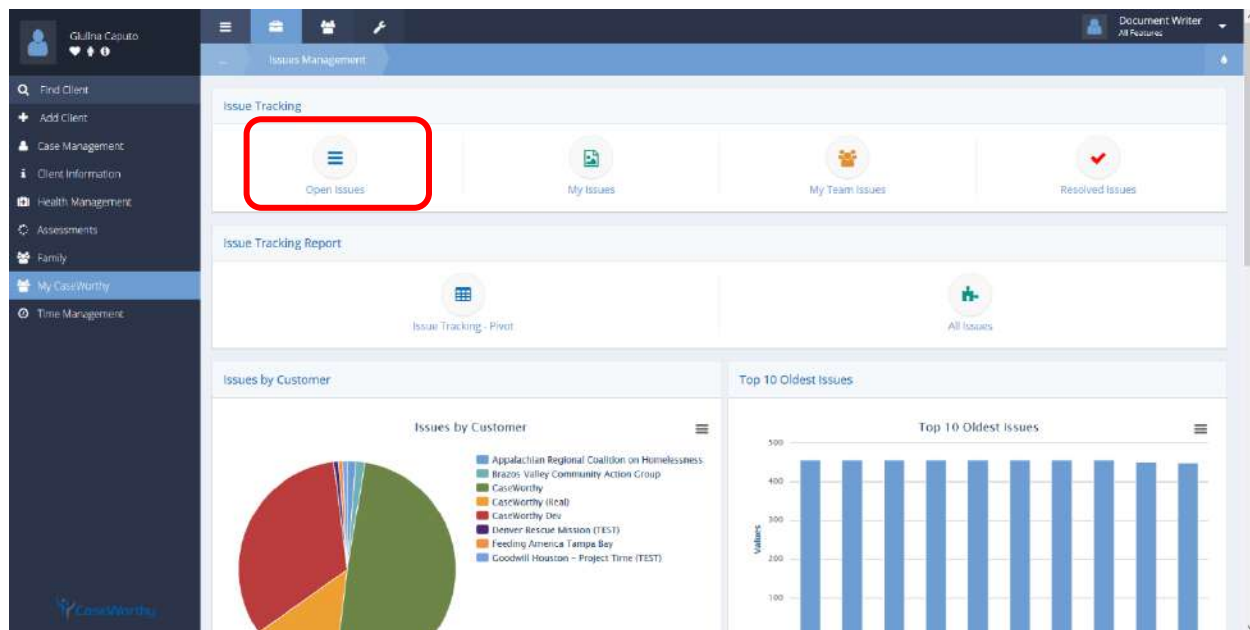


### Open Issues

**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.

The 'Open Issue Summary' form contains several input fields and buttons. On the left side, there are fields for 'Issue ID', 'Customer' (a dropdown), 'Affected Versions' (with 'All' and 'None' buttons and a 'Choose Options...' dropdown), 'Initiator', and 'Type'. On the right side, there are fields for 'Identified in Version' (a dropdown), 'Subject', 'Status' (with 'All' and 'None' buttons and a 'Choose Options...' dropdown), and 'Priority'. At the top right is a '+ Add New Issue' button. At the bottom right, a 'Search' button is highlighted with a red rectangle.

Click the  Search button to populate existing issues.

The list of open issues displays on the bottom half of the form.

Open Issue Summary

Issue ID

Customer

Affected Versions

Initiator

Type

Identified in Version

Subject

Status

Priority


+ Add New Issue

Total Rows: 43

Search

Issue ID	Identified in Version	Customer	Subject	Issue Date	Next Action Date	Initiator	Priority	Status	Assigned To	Days Overdue	Type
282	5.2.1	CaseWorthy Dev	test of new issue days old	11/10/2015	11/22/2015	Seay, Dale	Low	Blocked	Seay, Dale	162	Application Support
265	5.2.1	CaseWorthy Dev	Jane	9/30/2015	11/28/2015	Tjoe, Jane	Low	Assigned	One, Jane	156	Application Support
262	5.2.1	CaseWorthy Dev	Original Subject line	9/15/2015	9/25/2015	Seay, Dale	Low	Assigned	Seay, Dale	220	Application Support
255	5.1	CaseWorthy Dev	004-14-2014 2:49:50 PM	7/17/2015	7/17/2015	Seay, Test	Low	Blocked	Elason, Adrian	290	Application Support
254	5.1	CaseWorthy Dev	Issue from Empowered Solutions Group reported at 04-	7/17/2015	9/5/2015	Seay, Test	Low	Ready to Test	Seay, Dale	240	Application

Done

Click the action gear  icon associated with the desired issue and select the View Action/Resolution Details.

Total Rows: 43

Issue ID	Identified in Version	Customer	Subject	Issue Date	Next Action Date
282	5.2.1	CaseWorthy Dev	test of new issue days old	11/10/2015	11/22/2015
265	5.2.1	CaseWorthy Dev	Jane	9/30/2015	11/28/2015
262	5.2.1	CaseWorthy Dev	Original Subject line	9/15/2015	9/25/2015
255	5.1	CaseWorthy Dev	004-14-2014 2:49:50 PM	7/17/2015	7/17/2015
254	5.1	CaseWorthy Dev	Issue from Empowered Solutions Group reported at 04-14-2014 2:49:50 PM	7/17/2015	9/5/2015


View Action/Resolution Details

View Documents

Delete

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

Team Name

Total Rows: 6

Search

Team Name	# of 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.


Add New Action / Resolution

Add Issue Action

Action Date: 05/02/2016

Next Action Description:   
    
 p Words: 0


Team Name: \*  

Assign To: \*  

Created By: doc

Record Time: ☒

Issue Summary Information

Customer:  

Type: \*


Status: \*



Subject:


Hours: \*

Version: \*

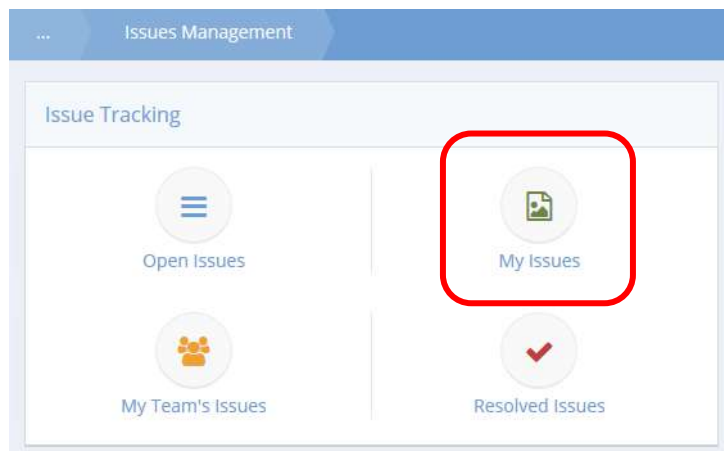
Priority: \* Low

Upload Document:  

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.

My Open Issues

Customer:  Priority:  Version:

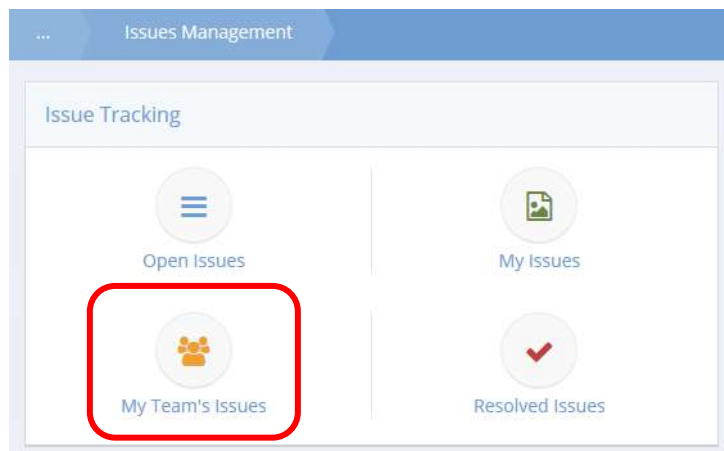
Status:  Choose Options...

Total Rows: 4

Issue ID	Customer	Priority	Subject	Next Action Date	Status	Detail	Issue Age In Days
248	CaseWorthy™ Dev	Low	testTest	7/1/2015	Assigned to Staff	<a href="#">Detail</a>	6
246	CaseWorthy™ Dev	Low	test	6/23/2015	Assigned to Staff	<a href="#">Detail</a>	14
245	CaseWorthy™ Dev	Low	testtesttest	6/17/2015	Assigned to Staff	<a href="#">Detail</a>	20
244	CaseWorthy™ Dev	Low	testingagain	5/17/2015	Assigned to Staff	<a href="#">Detail</a>	20

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.

My Team's Issue Summary

Customer:  Priority:

Status:  Version:

Choose Options...

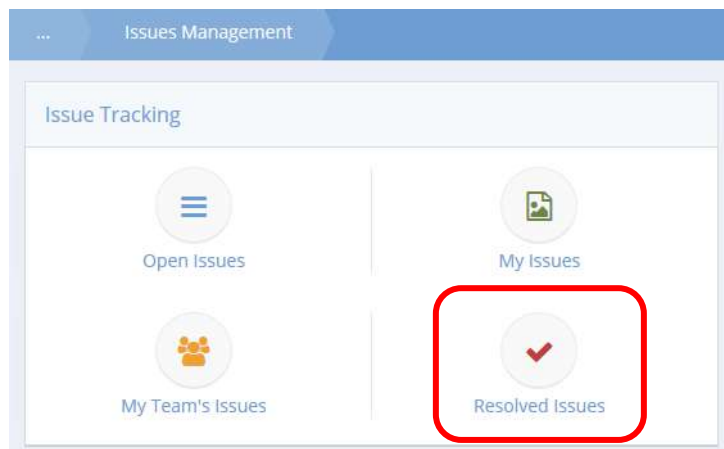
Total Rows: 101

Issue ID	Customer	Priority	Subject	Issue Date	Next Action Date	IssueTracking.TeamID	Status	Assigned To	Detail	Issue Age in Days
248	CaseWorthy™ Dev	Low	testtest	7/1/2015	7/1/2015	24	Assigned to Staff		<a href="#">Detail</a>	6
247	CaseWorthy™ Dev	Low	test	7/1/2015	7/1/2015		Assigned to Staff		<a href="#">Detail</a>	6
246	CaseWorthy™ Dev	Low	test	6/23/2015	6/23/2015		Assigned to Staff		<a href="#">Detail</a>	14
245	CaseWorthy™ Dev	Low	testtesttest	6/17/2015	6/17/2015		Assigned to Staff		<a href="#">Detail</a>	20
244	CaseWorthy™ Dev	Low	testingagain	6/17/2015	6/17/2015		Assigned to Staff		<a href="#">Detail</a>	20
243	Brazos Valley Community Action Group	Low	Brazos	6/17/2015	6/17/2015		Assigned to Staff		<a href="#">Detail</a>	20
242	Appalachian Regional Coalition on Homelessness	Low	test	6/17/2015	6/17/2015		Assigned to Staff		<a href="#">Detail</a>	20
235	CaseWorthy™ Dev	Low	test	6/12/2015	6/12/2015	103	Assigned to Staff		<a href="#">Detail</a>	25

Done

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.

The screenshot shows the 'Closed Issue Summary' form. It includes filters for Customer, Priority, and Version. Below the filters, it shows 'Total Rows: 27' and a search bar. The table below lists resolved issues with columns for Issue ID, Customer, Priority, Subject, Issue Date, Next Action Date, Detail, and Issue Age Days.

Issue ID	Customer	Priority	Subject	Issue Date	Next Action Date	Detail	Issue Age Days
249	CaseWorthy™ Dev	Low	test issue	7/7/2015	7/7/2015	<a href="#">Detail</a>	0
241	CaseWorthy™ Dev	Low	test	6/17/2015	6/17/2015	<a href="#">Detail</a>	0
236	CaseWorthy™ Dev	Low	test	6/12/2015	6/12/2015	<a href="#">Detail</a>	5
234	CaseWorthy™ Dev	Low	another test	6/12/2015	6/12/2015	<a href="#">Detail</a>	5
227	CaseWorthy™ Dev	High	This is marty's test, first...	4/14/2015	4/14/2015	<a href="#">Detail</a>	44

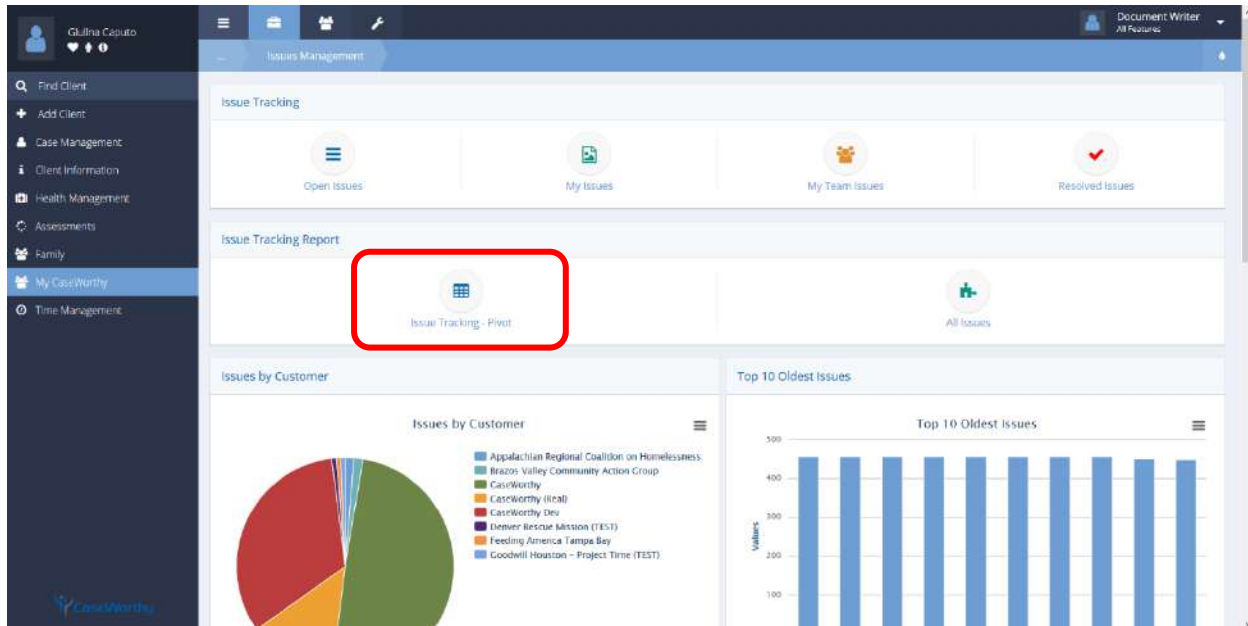
Adding and updating issues functionality is the same as documented for the Open Issues area.



## 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.

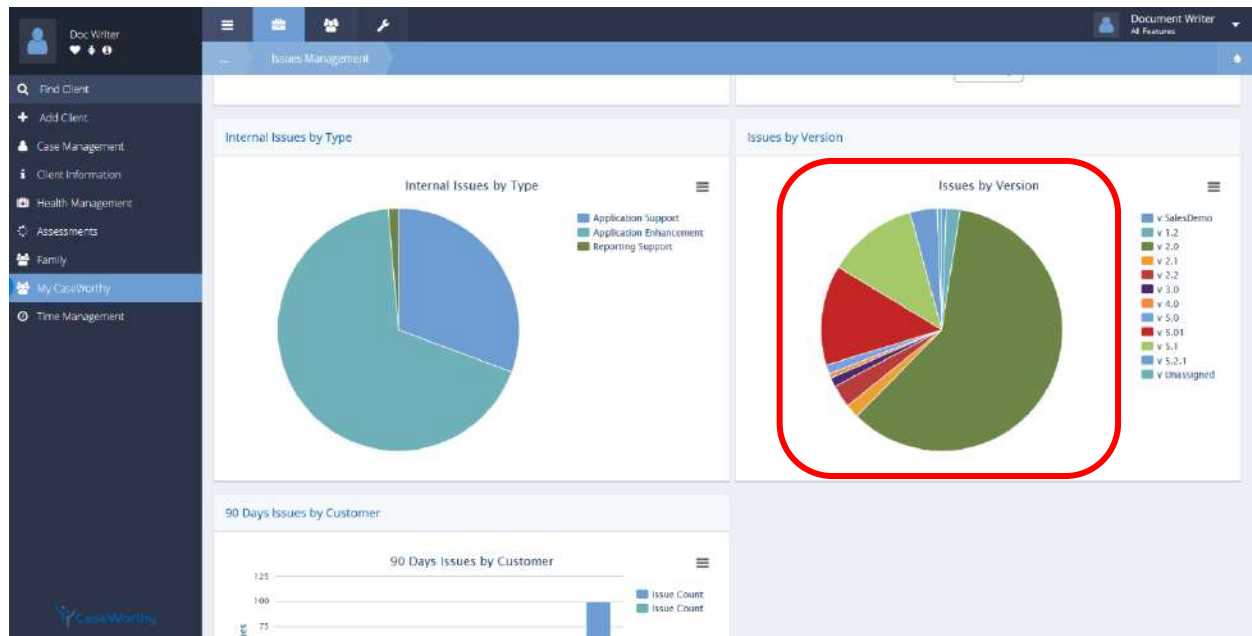
[illegible]

Apply settings for view and presentation as desired.

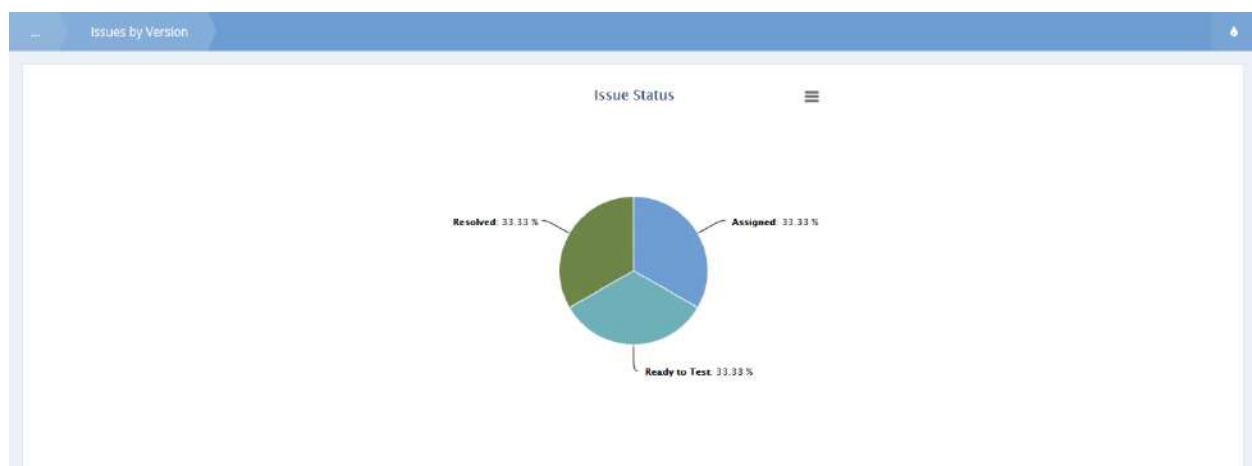
## Issues by Version

**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.

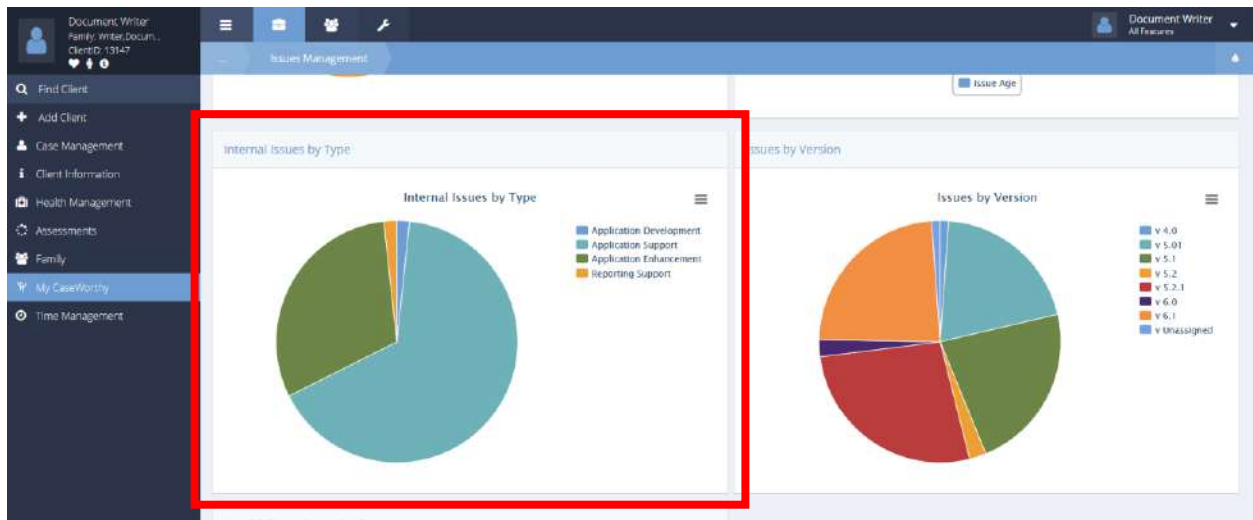


At the writing of this document, this is a view only form. Links to issues by status have not yet been set up. Select the ☒ Done button when finished.

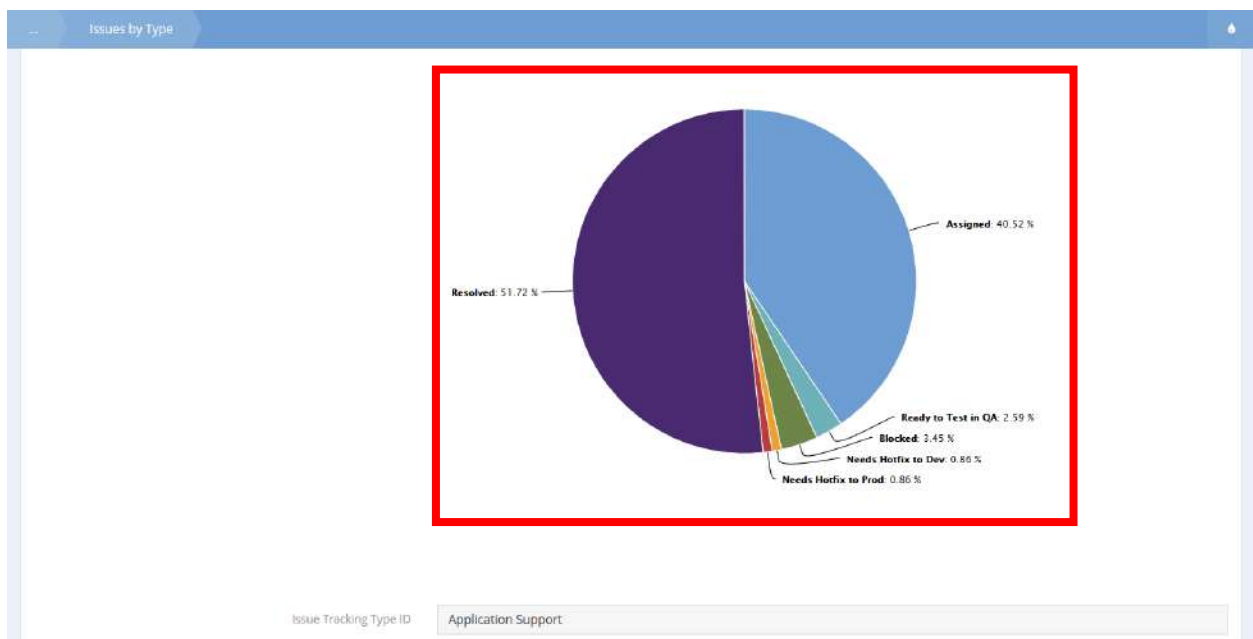
## Internal Issues by Type

**Objective:** View issues by status.

**Navigation:** Case Management>My CaseWorthy>Issues Management


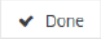


Select the desired section of the pie chart displayed on the Internal Issues by Type portion of the Issues Management dashboard. The Issues by Type form displays (specific to the section of the pie chart selected).



Select the desired section of the pie chart. The Issue Type by Status form displays.

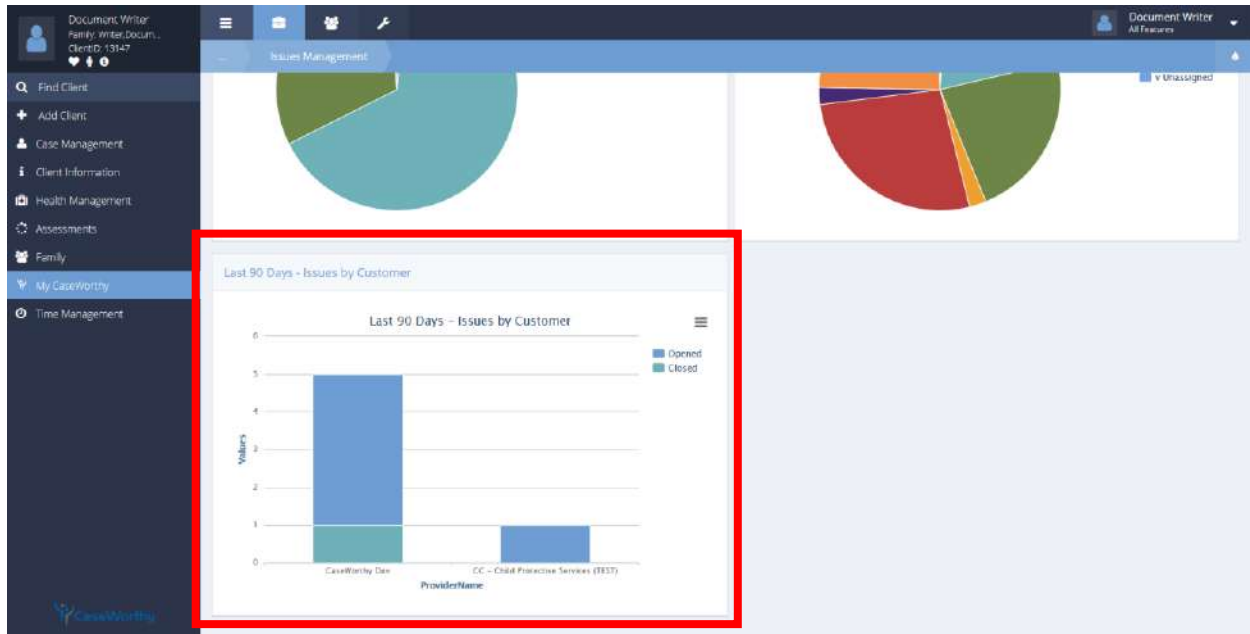
Issue Type by Status				
Total Rows: 60				
Issue ID	Type	Status	Description	
17	Application Support	Resolved	In the spreadsheet, right justify the input box as well as the header label.	
40	Application Support	Resolved	Enhance the EXCEL export to only include the columns on the form.	
41	Application 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  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.

... 90 Days Issues

Total Rows: 5

			Subject	Issue Date	Status
			Subject Line test	4/27/2016	Assigned
			test	6/1/2016	Blocked
	307	CaseWorthy Dev	test	7/1/2016	Resolved
	308	CaseWorthy Dev	test Jane 100	1/1/2000	Assigned

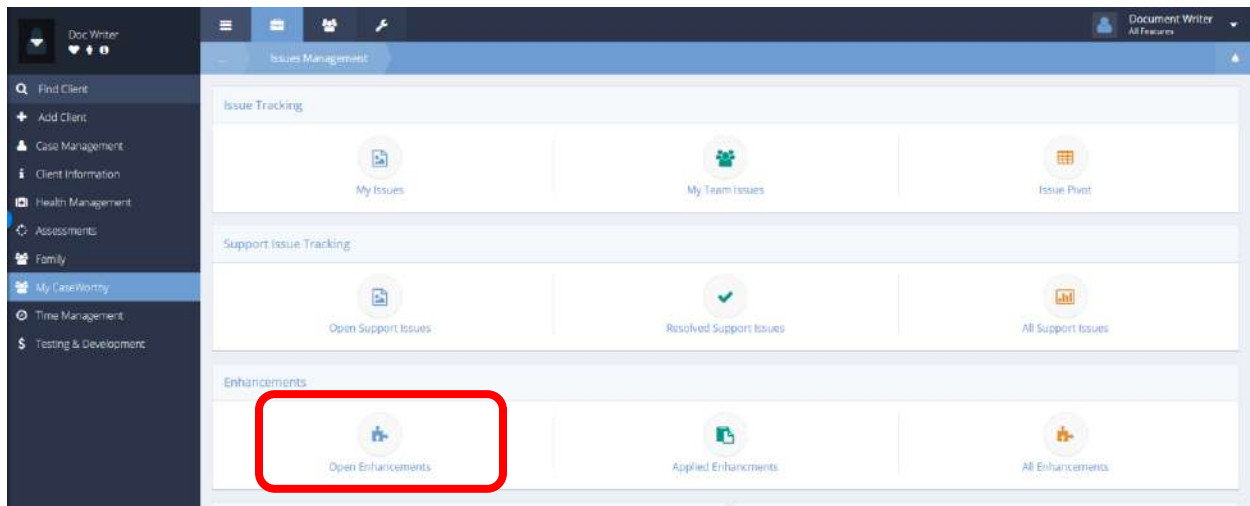
View Action/Resolution Details  
 View Documents  
 Delete

Click the Done button when finished.

## Enhancements

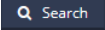
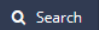
**Objective:** View open enhancement issues.


**Navigation:** Case Management>My CaseWorthy>Issues Management



Select Open Enhancements from the Enhancements portion of the Issues Management dashboard. The Open Enhancements form displays.

The screenshot shows the 'Open Enhancements' form. At the top is a header 'Open Enhancements' with a '+ Add New Issue' button. The form contains several input fields: 'Issue ID', 'Customer' (dropdown), 'Affected Versions' (with 'All' and 'None' buttons and a 'Choose Options...' dropdown), 'Initiator', 'Type' (dropdown), 'Identified in Version' (dropdown), 'Subject', 'Status' (with 'All' and 'None' buttons and a 'Choose Options...' dropdown), and 'Priority' (dropdown). At the bottom right, there is a 'Save' button highlighted with a red box. At the bottom center, there is a 'Done' button.

Enter valid search criteria into relevant fields and click the  button to populate results. Simply clicking the  button without entering any search criteria populates *all* existing open enhancement issues.

Open Enhancements 


Issue ID:  Identified in Version:




Customer:  Subject:


Affected Versions:  Status:



Initiator:  Priority:

Type:




Total Rows: 3 




	Issue ID	Identified in Version	Customer	Subject	Issue Date	Next Action Date	Initiator	Priority	Status	Assigned To	Days Overdue	Type
	302	5.2.1	CAPAI Idaho	Test Enhancement	6/1/2016	6/11/2016	Writer, Document	Low	Assigned	Seay, Test	-10	Reporting Enhancement
	301	5.2.1	Brazos Valley Community Action Group	uhyjikyhuky	6/1/2016	6/4/2016	Writer, Document	Medium	Needs Hotfix to Dev	Seay, Test	-3	Application Enhancement
	258		CaseWorthy Dev	Test	7/21/2015	7/21/2015	Eustice,	Low	Needs Hotfix	One, Jane	316	Application




To add a new enhancement issue, click the  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.

Total Rows: 3

	Issue ID	Identified in Version	Customer	Subject	Issue Date	Next Action Date	Initiator	Priority	Status	Assigned To
			ho	Test Enhancement	6/1/2016	6/11/2016	Writer, Document	Low	Assigned	Seay, Test
			ley Community up	uhyjikyhuky	6/1/2016	6/4/2016	Writer, Document	Medium	Needs Hotfix to Dev	Seay, Test
			hy Dev	Test	7/21/2015	7/21/2015	Eustice,	Low	Needs Hotfix	One, Jane

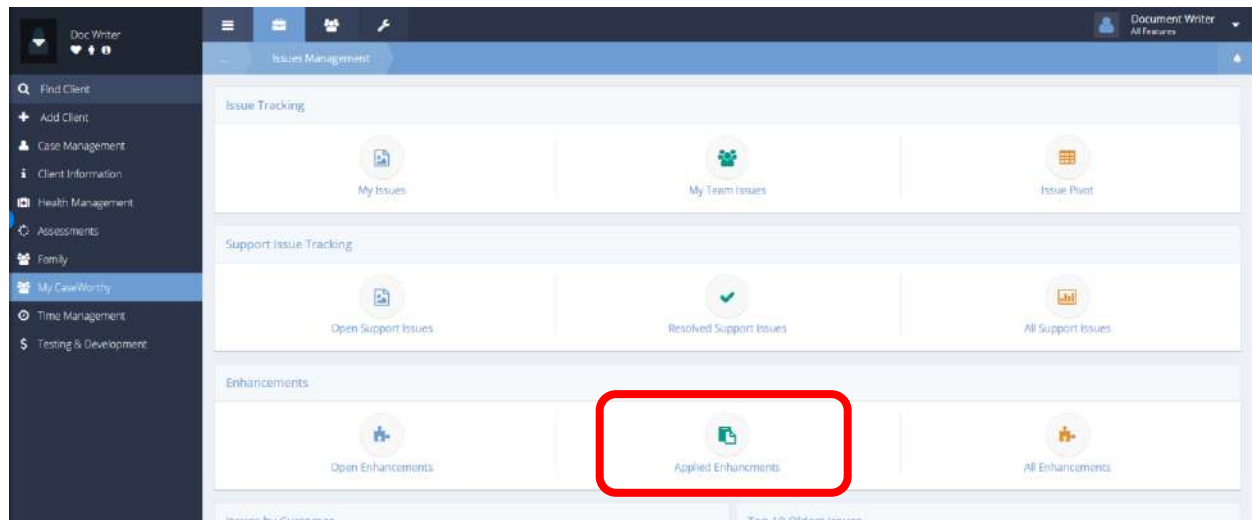
Click the  button when finished.



## Applied Enhancements

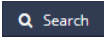
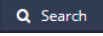
**Objective:** View resolved enhancement issues.

**Navigation:** Case Management>My CaseWorthy>Issues Management



Select Applied Enhancements from the Enhancements portion of the Issues Management dashboard. The Applied Enhancements form displays.

A screenshot of the 'Applied Enhancements' form. The form has a blue header bar with the title 'Applied Enhancements'. Below the header, there are five input fields arranged in two rows. The first row contains 'Issue ID' (text input), 'Customer' (dropdown menu), and 'Priority' (dropdown menu with a blue icon). The second row contains 'Version' (dropdown menu) and 'Subject' (text input). A red rectangular box highlights a 'Search' button with a magnifying glass icon, located in the bottom right corner of the form area. At the very bottom of the page, there is a dark blue bar with a 'Done' button.

Enter search criteria into relevant fields and click the  button to populate results. Simply clicking the  button with no search criteria populates all existing resolved enhancement issues.

Applied Enhancements

Issue ID


Customer











Version

Priority


Subject

Total Rows: 56



	Issue ID	Customer	Priority	Subject	Issue Date	Next Action Date	Issue Age Days	Subject	Initiator
	142		High		5/24/2012				2130
	141		High		5/24/2012				2130
	140		High		5/4/2012				2130
	139		High		5/4/2012				2130
	138		High		5/4/2012				2130
	135		High	Subject	3/15/2012	1/22/2015	496	Subject	2130
	134	CaseWorthy (Real)	High	Subject subject subject	3/15/2012	1/22/2015	496	Subject subject subject	2130
	133		High		3/15/2012				2130
	132		High		3/14/2012				2130
	131		High		3/14/2012				2130

Done

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.

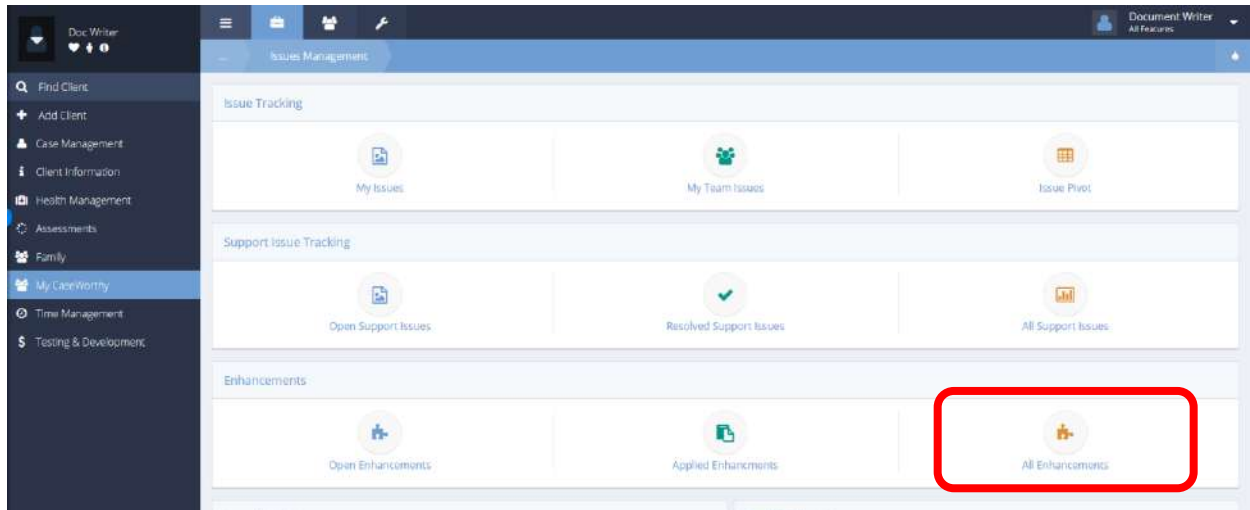
Total Rows: 56								
	Issue ID	Customer	Priority	Subject	Issue Date	Next Action Date	Issue Age Days	Subject
	142		High		5/24/2012			
	141		High		5/24/2012			
	<div> View Action/Resolution Details</div> <div> View Documents</div> <div> Delete</div>		High		5/4/2012			
			High		5/4/2012			
			High		5/4/2012			
	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.

The screenshot shows the 'All Enhancements' form. It has a blue header with 'All Enhancements' and an 'Add New Issue' button. The form contains several input fields and dropdown menus for filtering enhancement issues: 'Issue ID', 'Customer', 'Affected Versions' (with 'All' and 'None' buttons and a 'Choose Options...' dropdown), 'Initiator', 'Identified in Version', 'Subject', 'Status' (with 'All' and 'None' buttons and a 'Choose Options...' dropdown), and 'Priority'. A red box highlights the 'Search' button at the bottom right.

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.

... All Enhancements + Add New Issue

---

Issue ID:   
Customer:   
Affected Versions: All None  
  
Initiator:


Identified in Version:   
Subject:   
Status: All None  
  
Priority:

---





Total Rows: 54 Search

	Issue ID	Customer	Subject	Issue Date	Next Action Date	Initiator	Priority	Status	Assigned To	Issue Age In Days
+	258	CaseWorthy Dev	Test	7/21/2015	7/21/2015	Eustice, Damaris	Low	Needs Hotfix to Dev	One, Jane	316
+	142			5/24/2012		viswapraveen, Pallemptati	High	Resolved	Bingel, Brian	
+	138			5/4/2012		viswapraveen, Pallemptati	High	Resolved	Bingel, Brian	
+	135		Subject	3/15/2012	1/22/2015	viswapraveen, Pallemptati	High	Resolved	Seay, Test	496
+	134	CaseWorthy (Real)	Subject subject subject	3/15/2012	1/22/2015	viswapraveen, Pallemptati	High	Resolved	Bingel, Brian	496

Done

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.

Total Rows: 54

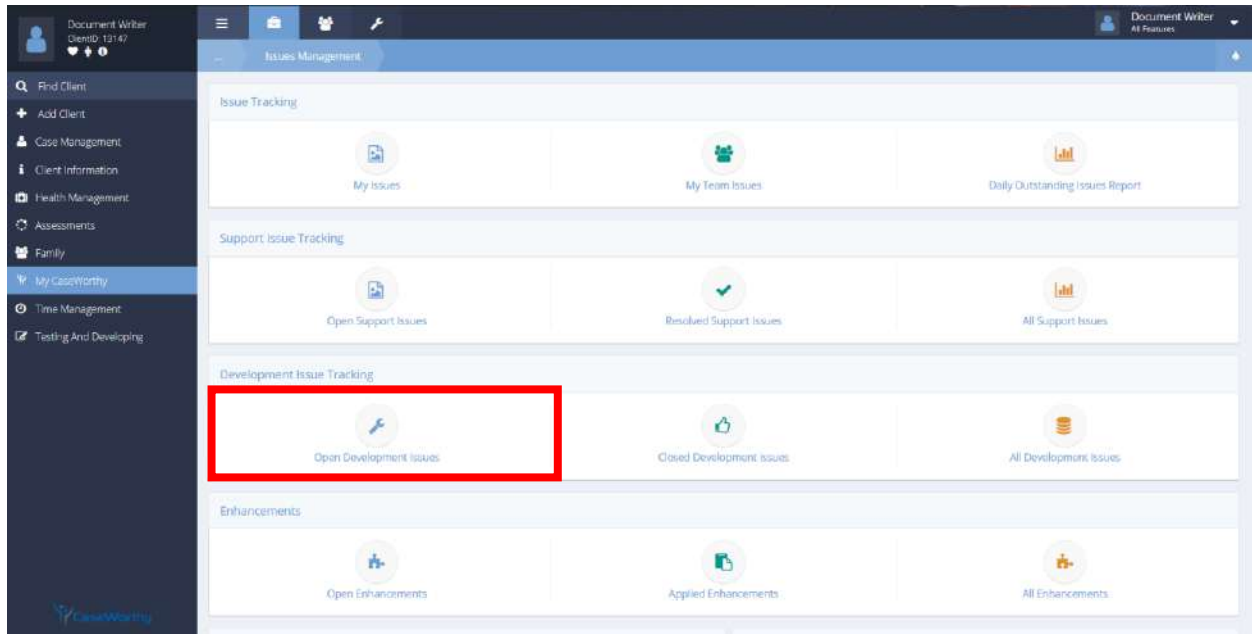
	Issue ID	Customer	Subject	Issue Date	Next Action Date	Initiator	Priority	Status	Assigned To
				7/21/2015	7/21/2015	Eustice, Damaris	Low	Needs Hotfix to Dev	One, Jane
				5/24/2012		viswapraveen, Pallemptati	High	Resolved	Bingel, Brian
				5/4/2012		viswapraveen, Pallemptati	High	Resolved	Bingel, Brian
	135		Subject	3/15/2012	1/22/2015	viswapraveen, Pallemptati	High	Resolved	Seay, Test
	134	CaseWorthy (Real)	Subject subject subject	3/15/2012	1/22/2015	viswapraveen, Pallemptati	High	Resolved	Bingel, Brian

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)*

Total Rows: 15

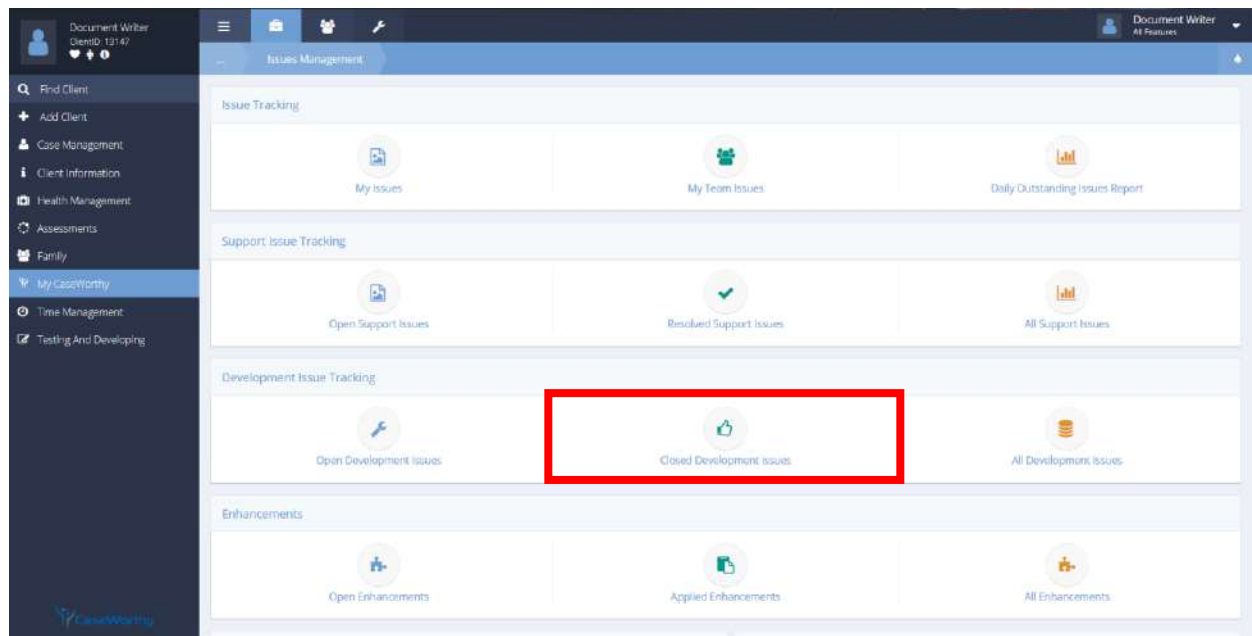
	Issue ID	Identified in Version	Customer	Subject	Issue Date	Next Action Date	Initiator	Priority	Status	Assigned To	Type	Days Overdue
	319	6.1	CaseWorthy Dev	Subject3	8/10/2016	8/20/2016	One, Jane	Low	Assigned	Tjoe, Jane	Application Development	4
	318	6.1	CaseWorthy Dev	Subject 2	8/10/2016	8/20/2016	One, Jane	Low	Assigned	Tjoe, Jane	Application Development	4

Done

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)*

Resolved Development Issues

Issue ID:

Customer:

Version:


Priority:

Subject:




Fix Type:



Search

Done

Use the fields at the top of the form to filter results. Click the  button to populate results.

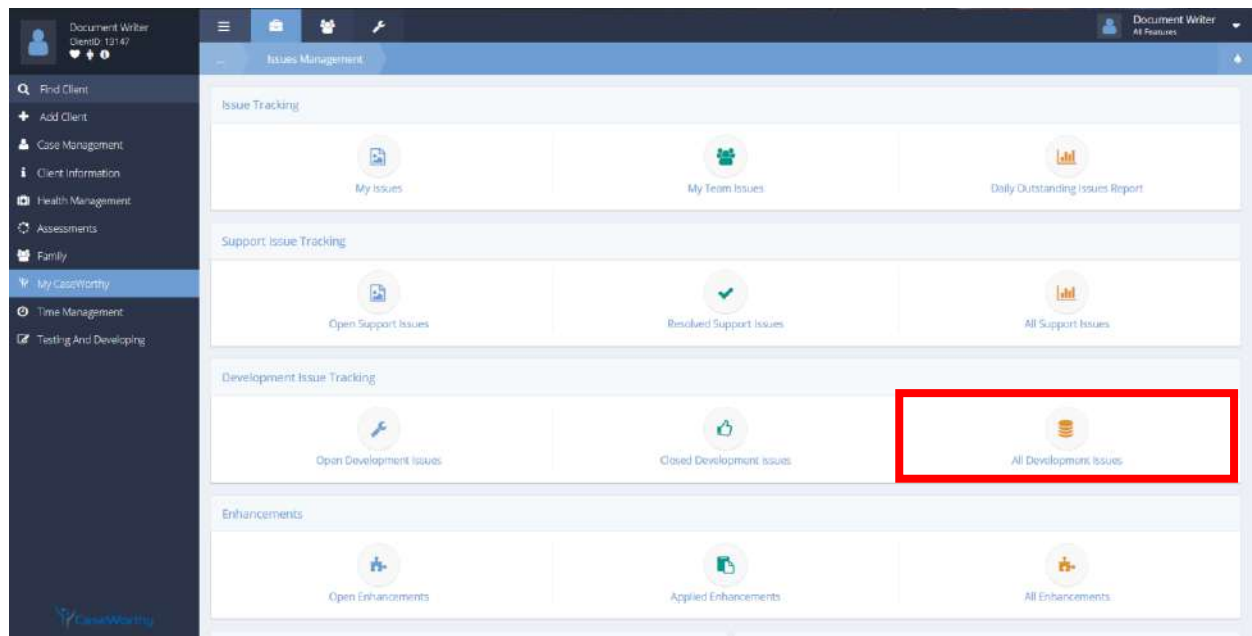
Total Rows: 3

	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  button when finished.

**Objective:** View all development issues.


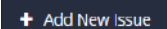
**Navigation:** Case Management>My CaseWorthy>Issues Management




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.

Total Rows: 19

	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	Blinks, 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	luh	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

Done

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.

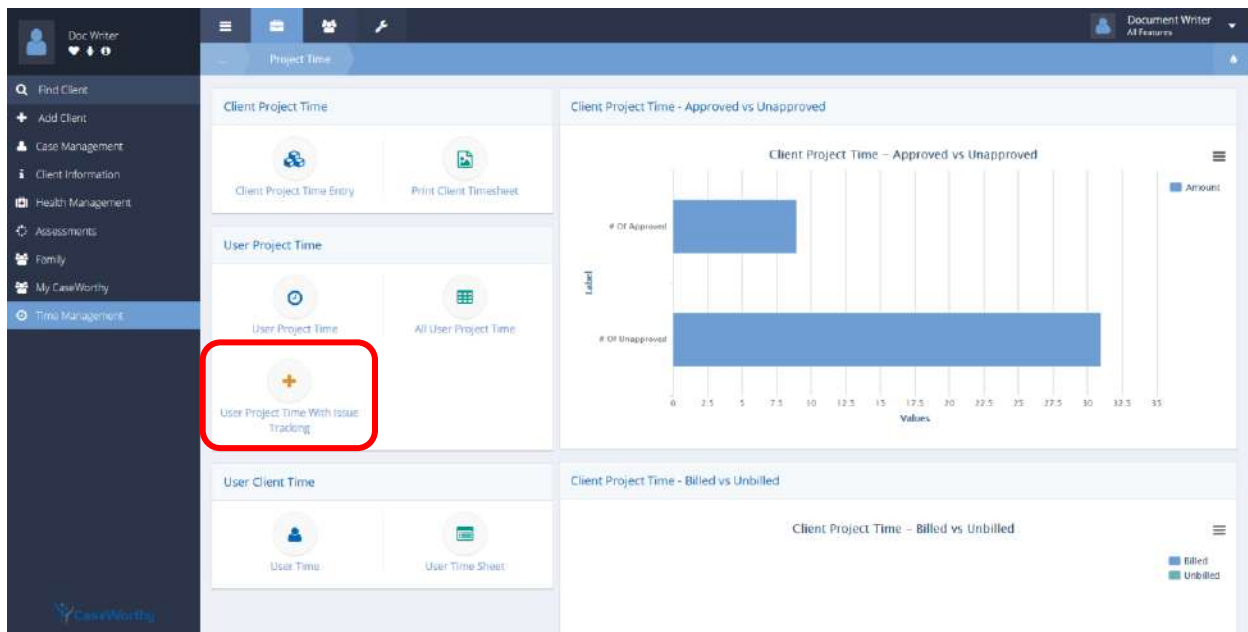
## Time Management

### 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.

User Project Time Summary

+ Add New

Transaction Type



Date: 02/10/2016 through 05/19/2016

Total Rows: 1

Search

	Transaction Type	Transaction Date	Customer	Project	Task	Hours	Amount	Entity ID
2		5/2/2016	Cocoon House	Implementation	Administrative Time	36,546,546.00	\$0.00	12799
Total:						36,546,546.00		

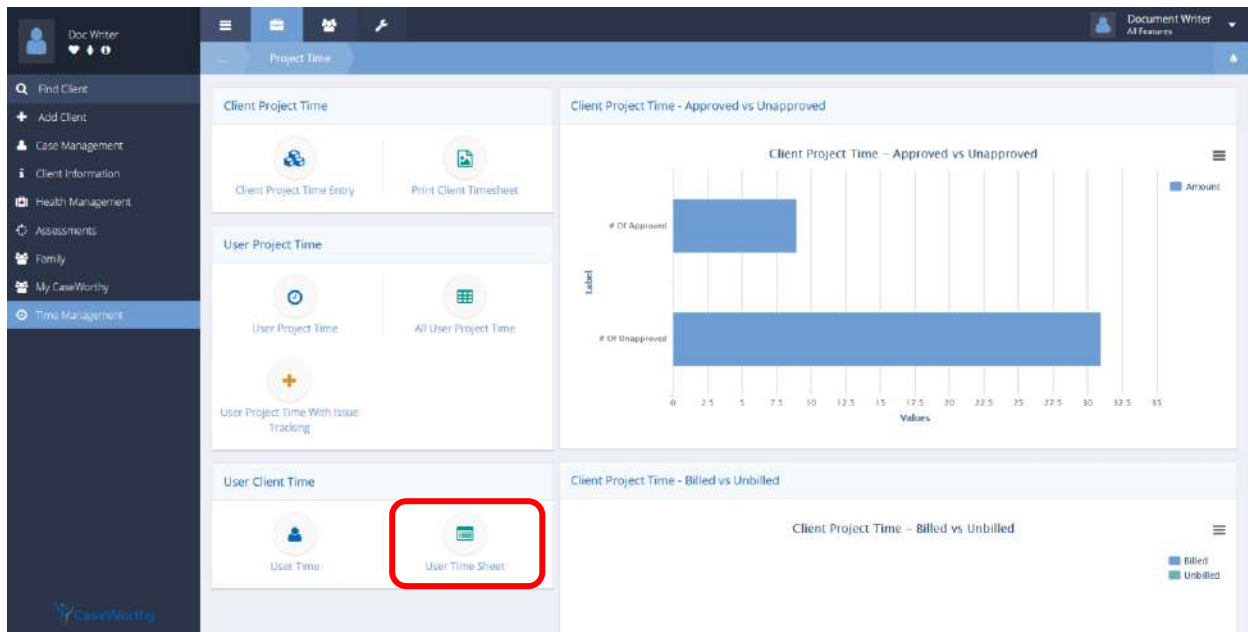
Done

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  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 screenshot shows the 'Print Entity Time Sheet' form. At the top, there's a header bar with 'Print Entity Time Sheet' and a 'Scheduled Reports' button. Below the header, there's a section titled 'Select the desired range of dates for the time report.' This section contains a 'User' dropdown menu set to 'Writer, Document', and two date pickers for 'Pay Period Begin Date' (05/17/2016) and 'Pay Period End Date' (05/17/2016). Below this, there's a section titled 'Other Print Option: Select "Time In" and "Time Out" if the data is captured and that level of detail is desired.' This section contains a checkbox labeled 'Print "Time In" and "Time Out" Columns' which is currently unchecked. At the bottom right, there are 'Report' and 'Cancel' buttons.

The User defaults. Enter a date range and check all relevant fields. To view or create scheduled reports, click the  button. Click the  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	Anonymous 12800, 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

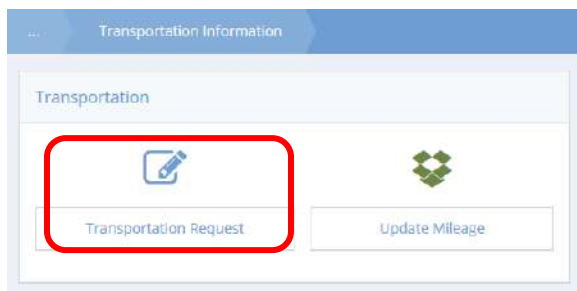
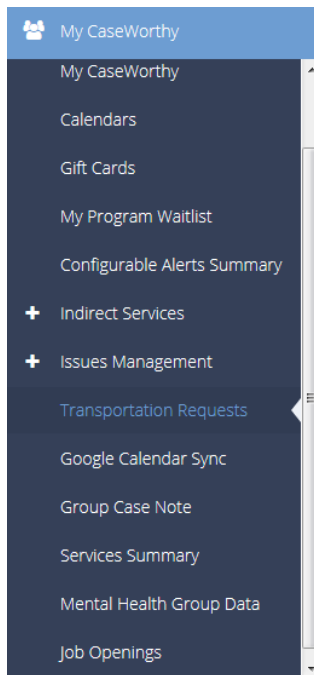
Date

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.

Transportation Request Summary

[Add New](#)

Total Rows: 22

Search

Request Date	Transportation Date	Client	# of Pass.	Actual Miles	Status	Approval Status
2/9/2015	2/10/2015	Tate, Scott	1		Scheduled	
9/9/2014	9/9/2014	Drapers, Sally	1	0	Driver and Vehicle Assigned	Approved
6/13/2013	6/19/2013	Brewer, Sally	1		Driver and Vehicle Assigned	Approved
6/11/2013	6/19/2013	Level, Maddie	1	40	Completed	Denied
6/13/2013	6/17/2013	Holmes, Sherlock	1		Driver and Vehicle Assigned	Approved
6/11/2013	6/12/2013	Level, Maddie	1		Driver and Vehicle Assigned	Approved
6/5/2013	6/10/2013	Page, Shaun	1	15	Completed	Pending
5/23/2013	5/23/2013	Adamson, Ray	1		Driver and Vehicle Assigned	Approved
3/8/2013	3/13/2013	Johnson, Brandon	1	0	Scheduled	Pending



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 screenshot shows the 'Transportation Request Input' form with the 'Transportation Information' section active. The form contains the following fields:

- Date of Transportation Request \***: 03/09/2015 (calendar icon)
- Client \***: Searchable text field with a magnifying glass icon.
- Address 1**: Text field
- Address 2**: Text field
- City**: Text field
- State**: Text field
- Zip Code**: Text field
- Cell Phone**: Text field
- Home Phone**: Text field
- Latitude**: Text field
- Longitude**: Text field
- Pick-up Location**: Checkbox (checked)
- Mode \***: Drop-down menu
- Reason for Request \***: Drop-down menu
- Date Transportation Needed \***: Text field with a calendar icon
- Number of Passengers \***: Text field with value '1'
- Comments**: Text area

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 screenshot shows the 'Program and Service' section of the form. It contains two drop-down menus:

- Program Enrollment \***: Drop-down menu
- Service**: Drop-down menu

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.

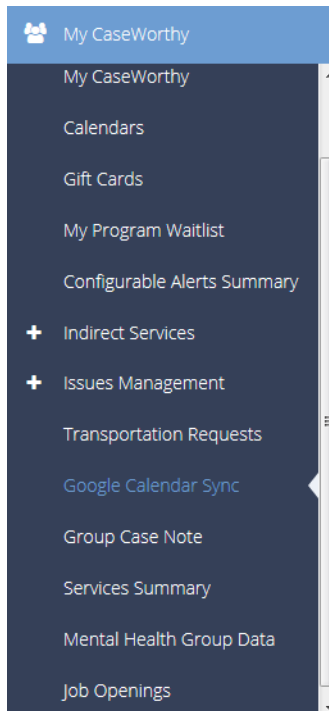
Once verified, the calculated total travel distance between the two locations is provided.

The screenshot shows a web form titled "To and From Address Location Information". It is split into two main sections: "Pickup Location" on the left and "To Location" on the right. Each section has a search icon (magnifying glass) next to a text input field. Below these are several rows of input fields: "Address 1", "Address 2", "City", "State", "Zip Code", "Latitude", and "Longitude". Underneath the "Verify Address" label in each section is a blue button with a magnifying glass icon and the text "Verify Address", which is highlighted with a red rectangle. At the bottom of the form, there is a "Distance" field showing "0.0" and a "Status" dropdown menu currently set to "Scheduled".

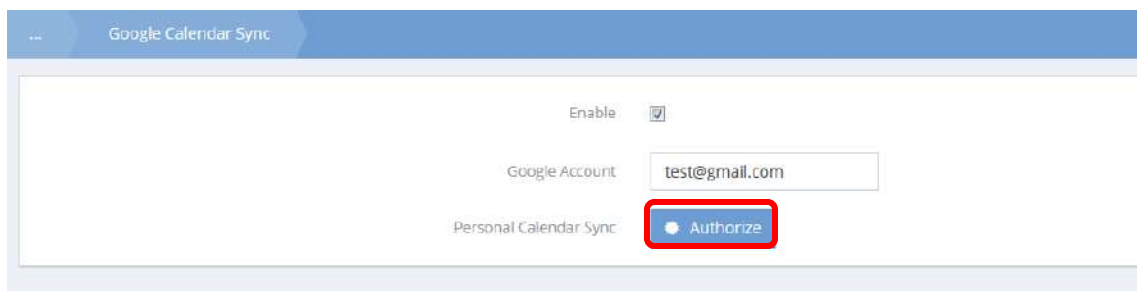
After the form is completed, click the  Save button.

## Google Calendar Sync

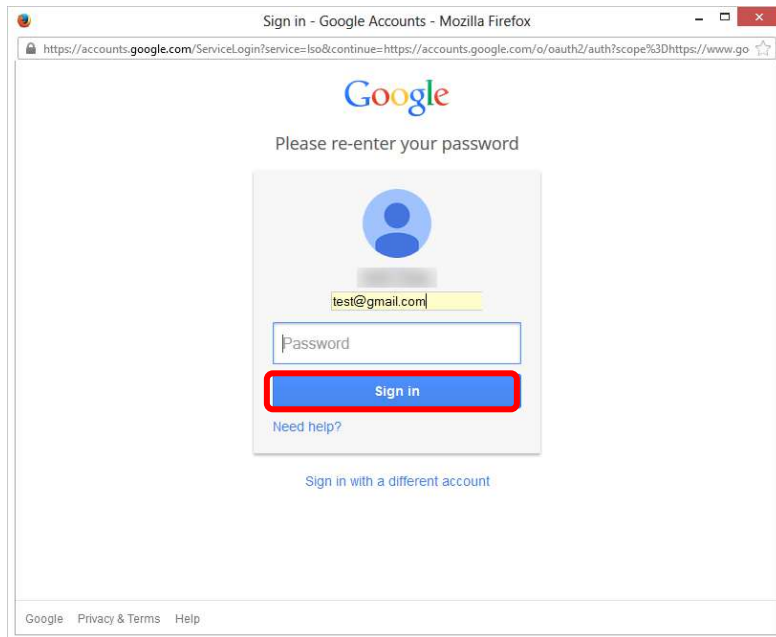
**Objective:** Set up user's CaseWorthy™ calendar to synchronize with Outlook calendar and Google calendar.



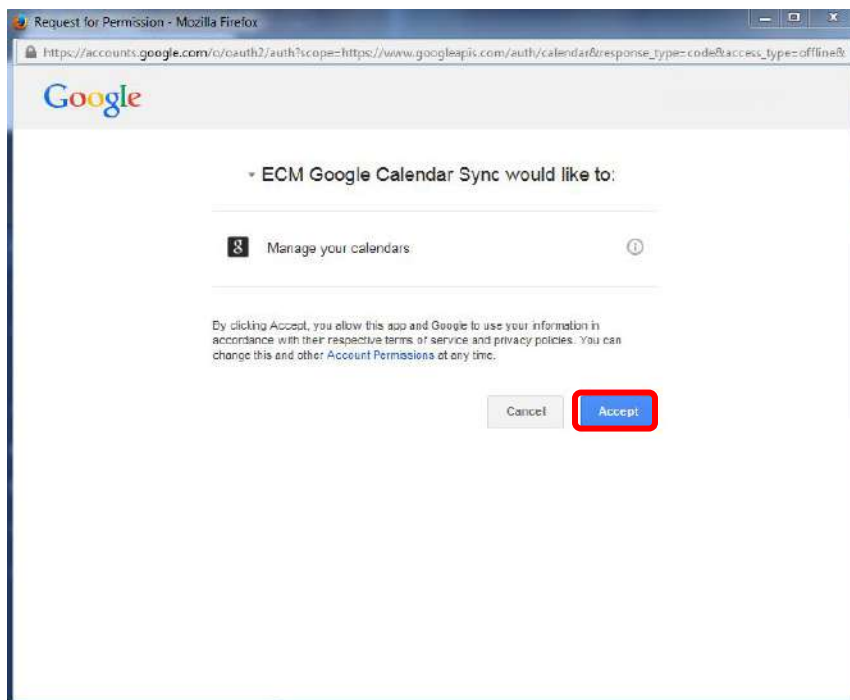
Click the Enable check box and enter the desired Gmail account name. Click the  Authorize button.




A separate Google Sign-in window displays.

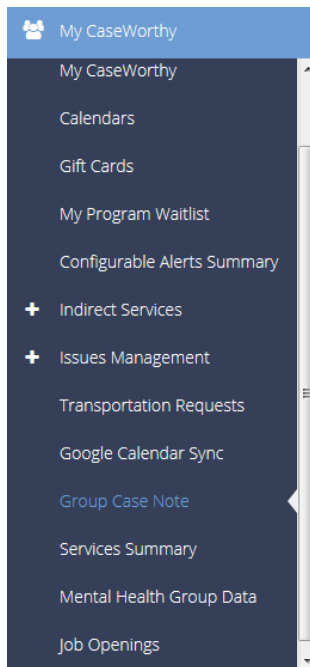


Enter the Gmail password and click the  button.



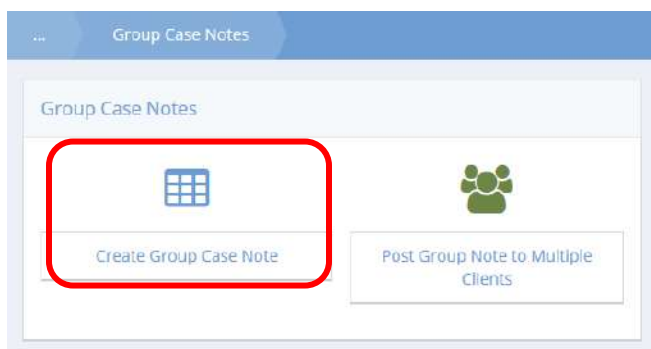
Click the  button.


## Group Case Note

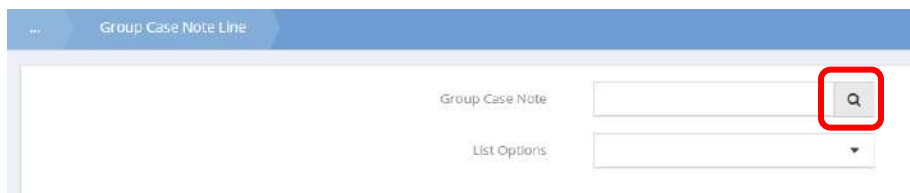



In Group Case Notes, case notes can be created and then posted to multiple clients' records.

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  button.

Select Group Case Notes Lookup

Select Group Case Notes

Case Note Type: Group

Total Rows: 61

Created Date	Case Note Summary	Case Note Type	Created By	Restriction
1/15/2015	User Confidentiality Agreement		Brian	Shared
1/14/2015	description	Group	oelanson	Shared
1/13/2015	Case Note Preview Default	Group	tsavey	Shared
1/13/2015	test me next	Group	nina	Shared
1/13/2015	test message	Group	marly	Shared
12/18/2014	User Confidentiality Agreement		Brian	Shared
12/17/2014	Test	Monthly Progress Notes	Grace	Shared
11/10/2014	Case Note Preview Default	Group	kaileen	Shared


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.**


Select Group Case Notes Lookup

Add Group Case Note



Summary Description: #

Template:  Type: Group

Body



Words: 0

Sharing: Shared:  Read Only 

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.

Group Case Note Line

Group Case Note: summary

List Options: Case Manager

Case Manager: Administrator, Allen, Kathleen, Argeris, Scott, Beck, Cameron, Bell, Lulu, Bingel, Brian, Bingel, Brian

Client
<input checked="" type="checkbox"/> Test, Mama
<input checked="" type="checkbox"/> Beckster, Cameroon
<input checked="" type="checkbox"/> Beckster, Cameroon
<input checked="" type="checkbox"/> Caputo, Giulina
<input checked="" type="checkbox"/> Kingswood, Kimbo
<input checked="" type="checkbox"/> Adamson, Allen
<input checked="" type="checkbox"/> James, Scott
<input checked="" type="checkbox"/> Zames, Meg
<input checked="" type="checkbox"/> Tet111, Alex
<input checked="" type="checkbox"/> Jane231, Jane

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.

Group Case Note Line

Group Case Note: summary

List Options: Case Manager / Program

Case Manager: Elison, Adrian

Program/Enrollment: 1 English for Employment

Client
<input checked="" type="checkbox"/> Bosell, Steve

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.

Group Case Note Line

Group Case Note: summary

List Options: Program

Program/Enrollment: 1 English for Employment

Client

<input type="checkbox"/>	Arden, Child
<input type="checkbox"/>	Arden, Ellie
<input type="checkbox"/>	Arden, Steve
<input type="checkbox"/>	Bosell, Steve

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.

Group Case Note Line

Group Case Note: summary

List Options: Resource / Usage

Resource: CCSC Computer Room

Usage: Computer Class

Client

<input type="checkbox"/>	Test, Geraldine
<input type="checkbox"/>	Anderson, Jennifer

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 **Save** and the group case note is automatically recorded under each of the selected clients.

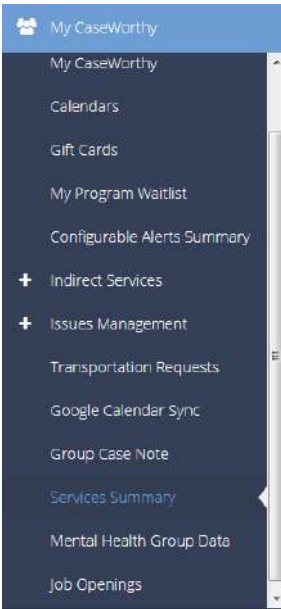
Client

<input type="checkbox"/>	Arden, Child
<input type="checkbox"/>	Arden, Ellie
<input type="checkbox"/>	Arden, Steve
<input checked="" type="checkbox"/>	Bosell, Steve




## Services Summary

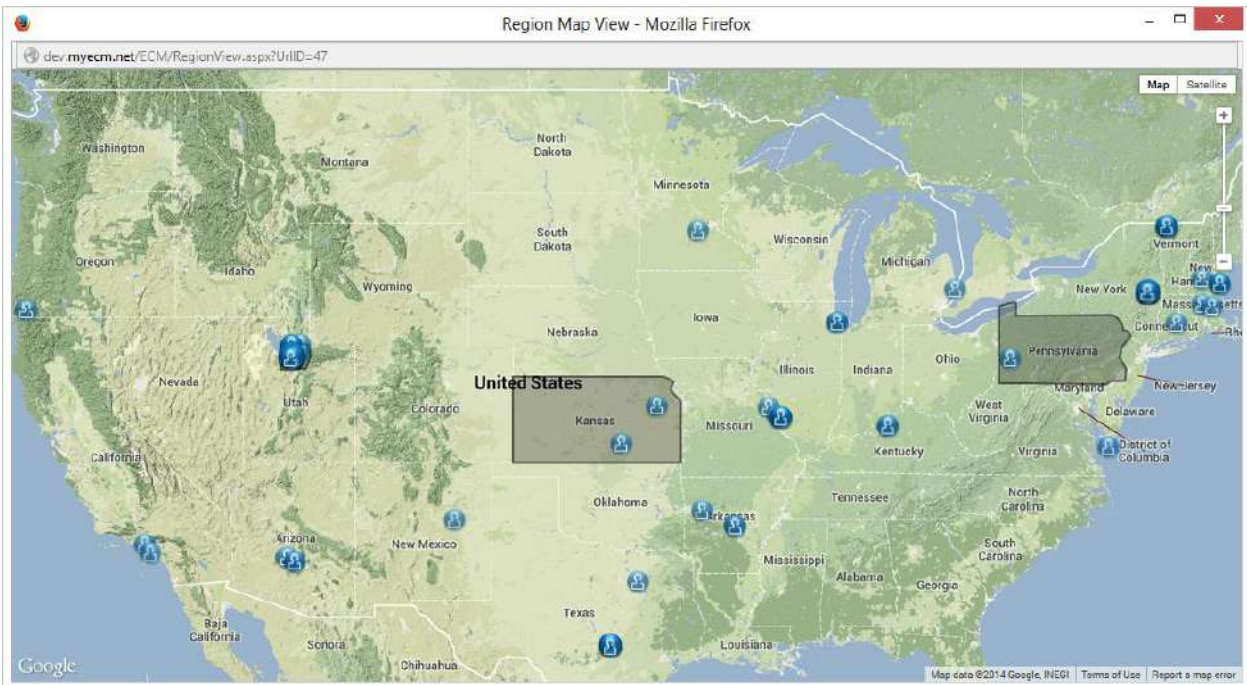
**Objective:** View all services, locate service providers on a map, add and edit services including diagnoses codes.




Services Summary						
Total Rows: 5						
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	
4/26/2015 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  View in Map 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.

Services Summary

View In Map

Total Rows: 5

 Edit Service	Program	Service	Units	Unit Value	Total
 View Account Transaction	Behavioral Health	Medical Psychoanalysis	1.00	\$10.00	\$10.00
 Delete	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 Add / Edit Service form displays.

**Add/Edit Service**

Begin Date: 05/05/2015 | End Date: 05/05/2015

Service: Medical Psychoanalysis | Program: Behavioral Health

Account: | Method Of Contact:

**Service Units and Amount**

Unit Of Measure: Each | Unit Value: 10.00


Quantity: 1.00 | Unit Total: 10


Paid to Date: 0.00 | Restriction: Shared

**Service Accounting**

Obligation Date: | Amount Paid: 0.00

Obligation Amount: 0.00 | Remaining: 0.00

Make any desired changes and click on the  Save 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.

**Services Summary** View in Map

Total Rows: 5

	Program	Service	Units	Unit Value	Total
 View Account Transaction	Behavioral Health	Medical Psychoanalysis	1.00	\$10.00	\$10.00
 View	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 View Transaction History form displays.

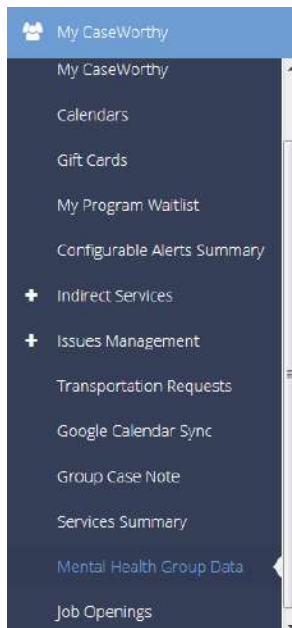
**View Transaction History**

Total Rows: 0

Service	Service Date	Transaction Type	Transaction Date	Service Total	Paid Total	Paid Amount
---------	--------------	------------------	------------------	---------------	------------	-------------

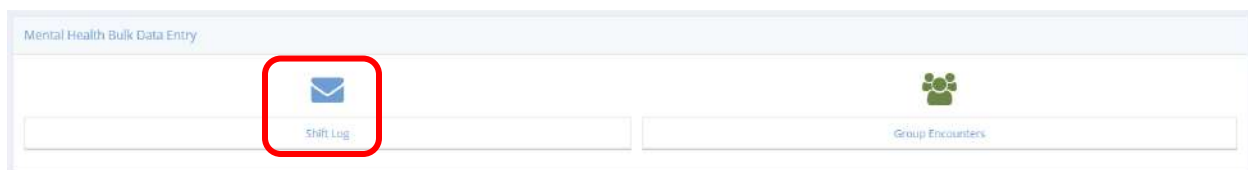
## Mental Health Group Data

**Objective:** View the shift log and group encounters summary of mental health group.




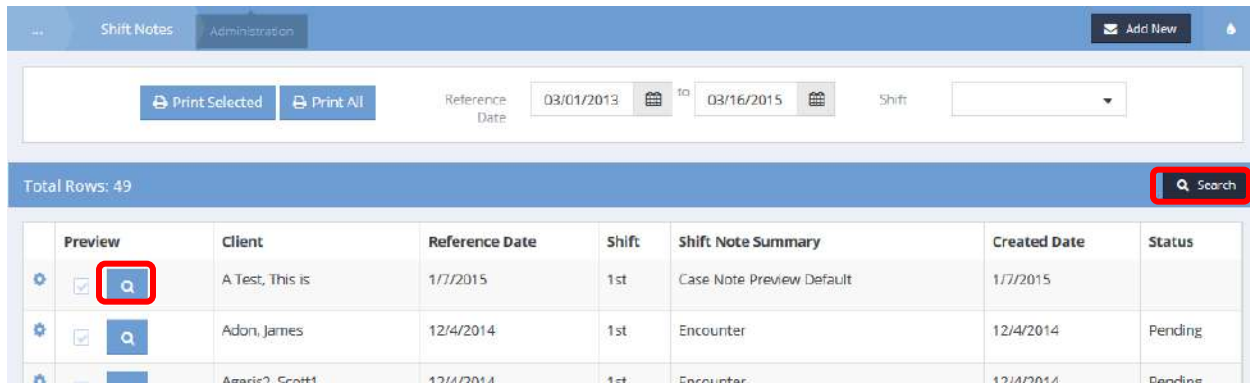
### *Shift Log*




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.



Preview	Client	Reference Date	Shift	Shift Note Summary	Created Date	Status
	A Test, This is	1/7/2015	1st	Case Note Preview Default	1/7/2015	
	Adon, James	12/4/2014	1st	Encounter	12/4/2014	Pending
	Adon, James	12/4/2014	1st	Encounter	12/4/2014	Pending

To preview a shift note, click on the magnifying glass  icon. A new window opens with the preview.




Preview

Created by: Kathleen Allen test

Created Date: 2/12/2014 12:00:00 AM

Summary: 8am Shift Note

Client reports counseling is helping him work through issues.

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.

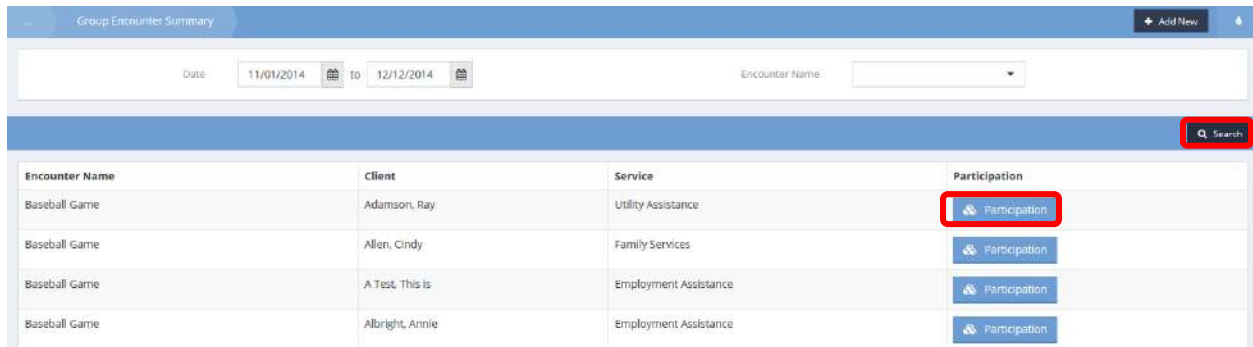
Make any desired changes and click the  **Save** button in the lower right corner of the form.

**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  button. The participant list appears.



The Group Encounter Summary form displays a search interface. At the top, there is a header bar with "Group Encounter Summary" and an "Add New" button. Below this, there is a search area with a "Date" field set to "11/01/2014" to "12/12/2014" and an "Encounter Name" dropdown menu. A "Search" button is located on the right side of the search area. Below the search area, a table lists participants with columns for "Encounter Name", "Client", "Service", and "Participation". The first row shows "Baseball Game" for "Adamson, Ray" with "Utility Assistance" service, and a "Participation" button is highlighted with a red box. The other rows show "Baseball Game" for "Allen, Cindy", "A Test, This Is", and "Allbright, Annie", all with "Employment Assistance" service and "Participation" buttons.

Encounter Name	Client	Service	Participation
Baseball Game	Adamson, Ray	Utility Assistance	
Baseball Game	Allen, Cindy	Family Services	
Baseball Game	A Test, This Is	Employment Assistance	
Baseball Game	Allbright, Annie	Employment Assistance	

To view participation details, click the  button associated with the desired participant. The Group Encounter Participation form displays client specific information.



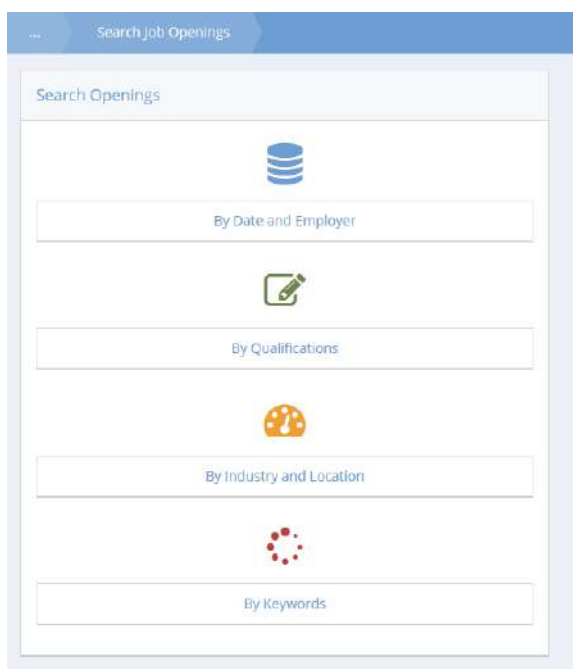
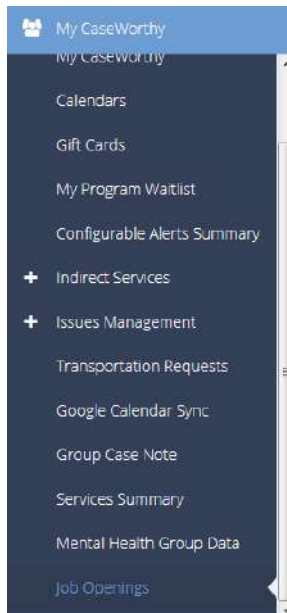
The Group Encounter Participation form displays client specific information. At the top, there is a header bar with "Participation" and a close button. Below this, there is a "Client" field set to "Adamson, Annie". Below the client field, there is a table with columns for "Mood", "Participation", "Response To Group", "Task Learning", and "Thought Content". The first row shows "Anxious" for "Active With Encouragement", "Engaged In Problem Solving", "Ability To Participate In Task Independently", and "Appropriate".

Mood	Participation	Response To Group	Task Learning	Thought Content
Anxious	Active With Encouragement	Engaged In Problem Solving	Ability To Participate In Task Independently	Appropriate

## Job Openings

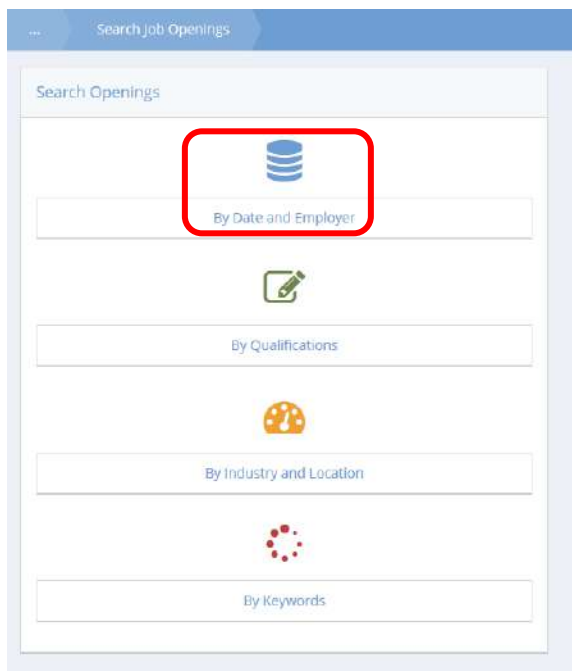
### Job Opening Data Presentation

**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.


Search Job Openings by Date and Employer

Print Selected Print All Date (Open) 05/07/2015 to 05/07/2015 Employer Status: Open

Total Rows: 0

Search

Job Description	Employer	Employer Website	Posting URL	Benefits Type	Starting Pay	Qualifications	Title	# of Positions	Job Order Close Date
-----------------	----------	------------------	-------------	---------------	--------------	----------------	-------	----------------	----------------------





To see all job openings, click on the  Search button. The resultant list is printable and filterable by date range, employer and status.

Search Job Openings by Date and Employer

Print Selected Print All Date (Open) 05/07/2015 to 05/07/2015 Employer Status: Open

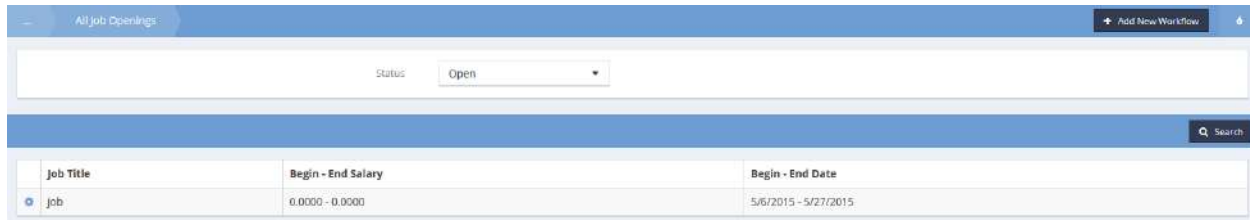
Total Rows: 1

Search

Job Description	Employer	Employer Website	Posting URL	Benefits Type	Starting Pay	Qualifications	Title	# of Positions	Job Order Close Date
  	CaseWorthy				\$0.00		job	0	5/27/2015

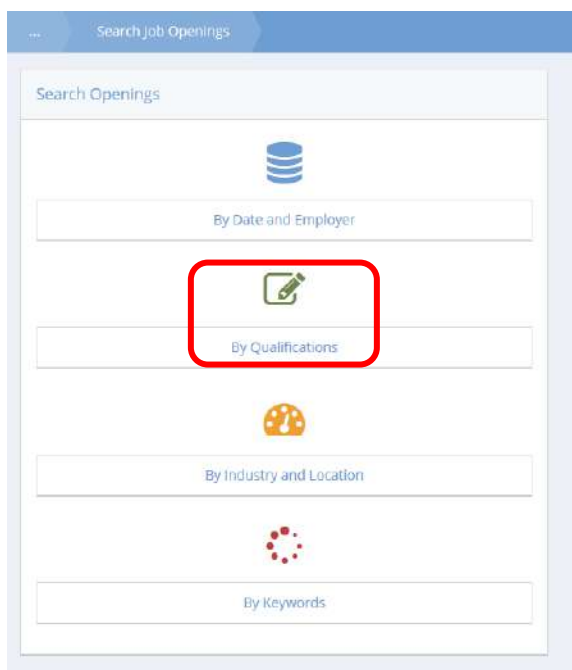


The All Job Openings form displays a list all job openings for that employer.

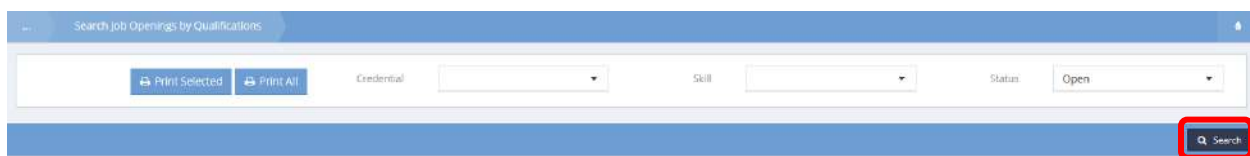


Job Title	Begin - End Salary	Begin - End Date
job	0.0000 - 0.0000	5/6/2015 - 5/27/2015

## 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.

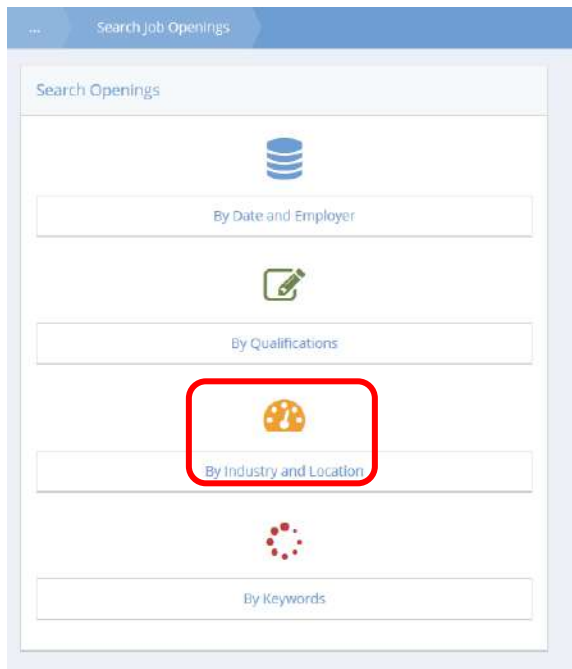
The resultant list is printable and filterable by credential, skill and status.

Job Description	Job Title	Employer	Credential	Skill	Employer Website	Posting URL	Job Order Close Date	Starting Pay	# of Positions
	job	CaseWorthy	Skill	Ability to Motivate and Assist			5/27/2015 12:00:00 AM	\$0.00	0

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.

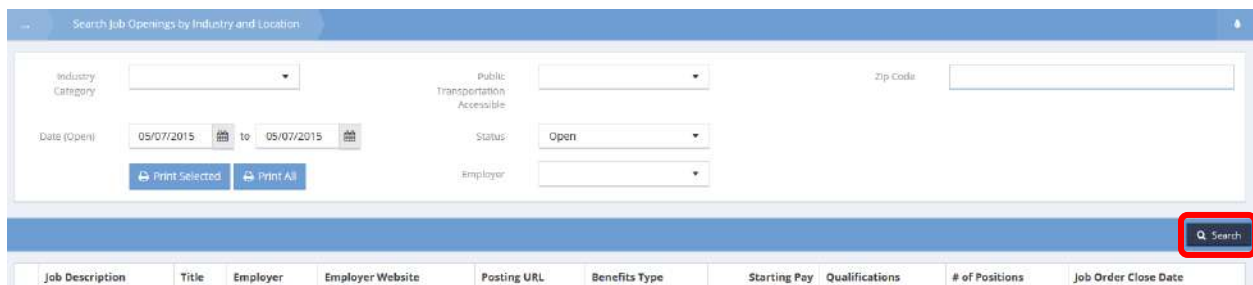
Job Description	Job Title	Employer	Credential	Skill	Employer Website	Posting URL	Job Order Close Date	Starting Pay	# of Positions
	job	CaseWorthy	Skill	Ability to Motivate and Assist			5/27/2015 12:00:00 AM	\$0.00	0

## All Job Openings by Industry

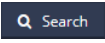


The screenshot shows a web interface titled "Search Job Openings". Below the title is a "Search Openings" section with five options, each with an icon and a text label: "By Date and Employer" (database icon), "By Qualifications" (magnifying glass over a document icon), "By Industry and Location" (globe icon, highlighted with a red rectangle), and "By Keywords" (dotted circle icon). Each option is followed by a text input field.

Select the "By Industry and Location" icon from the Search Openings menu. The Search Job Openings By Industry and Location form displays.



The screenshot shows the "Search Job Openings by Industry and Location" form. It includes several input fields: "Industry Category" (dropdown), "Public Transportation Accessible" (dropdown), "Zip Code" (text), "Date (Open)" (date range picker set to 05/07/2015 to 05/07/2015), "Status" (dropdown set to Open), and "Employer" (dropdown). There are "Print Selected" and "Print All" buttons. A "Search" button with a magnifying glass icon is highlighted with a red rectangle. Below the form is a table with the following headers: Job Description, Title, Employer, Employer Website, Posting URL, Benefits Type, Starting Pay, Qualifications, # of Positions, and Job Order Close Date.

To see all job openings, click on the  button. The resultant list is printable and filterable by industry category, public transportation accessibility, employer, date range zip code and status.

Search job Openings by Industry and Location

Industry Category:  Public Transportation Accessible:  Zip Code:

Date (Open): 05/07/2015 to 05/07/2015 Status: Open

[Print Selected](#) [Print All](#) Employer:

[Search](#)

	Job Description	Title	Employer	Employer Website	Posting URL	Benefits Type	Starting Pay	Qualifications	# of Positions	Job Order Close Date
		job	CaseWorthy				\$0.00		0	5/27/2015
		job	CaseWorthy				\$0.00		0	5/27/2015
		job	CaseWorthy				\$0.00		0	5/27/2015
		job	CaseWorthy				\$0.00		0	5/27/2015
		job	CaseWorthy				\$0.00		0	5/27/2015

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.

Search job Openings by Industry and Location

Industry Category:  Public Transportation Accessible:  Zip Code:

Date (Open): 05/07/2015 to 05/07/2015 Status: Open

[Print Selected](#) [Print All](#) Employer:

[Search](#)

	Job Description	Title	Employer	Employer Website	Posting URL	Benefits Type	Starting Pay	Qualifications	# of Positions	Job Order Close Date
		job	CaseWorthy				\$0.00		0	5/27/2015
		job	CaseWorthy				\$0.00		0	5/27/2015
		job	CaseWorthy				\$0.00		0	5/27/2015
		job	CaseWorthy				\$0.00		0	5/27/2015

## Job Orders by Keywords

Search Job Openings

Search Openings

By Date and Employer

By Qualifications

By Industry and Location

By Keywords

Select the “By Keywords” icon from the Search Openings menu. The Search Job Openings By Keywords form displays.

Search Job Openings by Keywords







Keywords




All None

Choose Options...

Search

To see all job openings, click on the **Search** button. The resultant list is printable and filterable keywords.

Job Description	Job Order ID	Job Title	Close Date	Starting Pay	# of Positions	Qualifications	Employer	Keyword	Employer Website	Posting URL
 	128	job	5/27/2015	\$0.00	0		CaseWorthy	HTML		
 	128	job	5/27/2015	\$0.00	0		CaseWorthy	Security Clearance		






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.

Search Job Openings by Keywords

Keywords

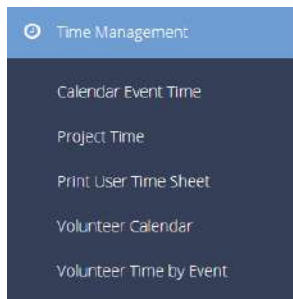
AllNone

Choose Options...

Job Description	Job Order ID	Job Title	Close Date	Starting Pay	# of Positions	Qualifications	Employer	Keyword	Employer Website	Posting URL
 Contact Employer	128	job	5/27/2015	\$0.00	0		CaseWorthy	HTML		
 	128	job	5/27/2015	\$0.00	0		CaseWorthy	Security Clearance		



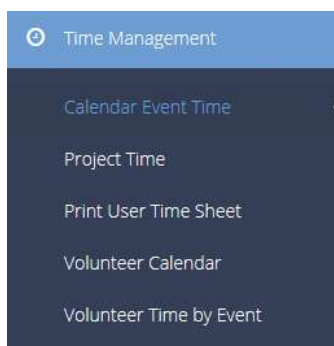
## Time Management



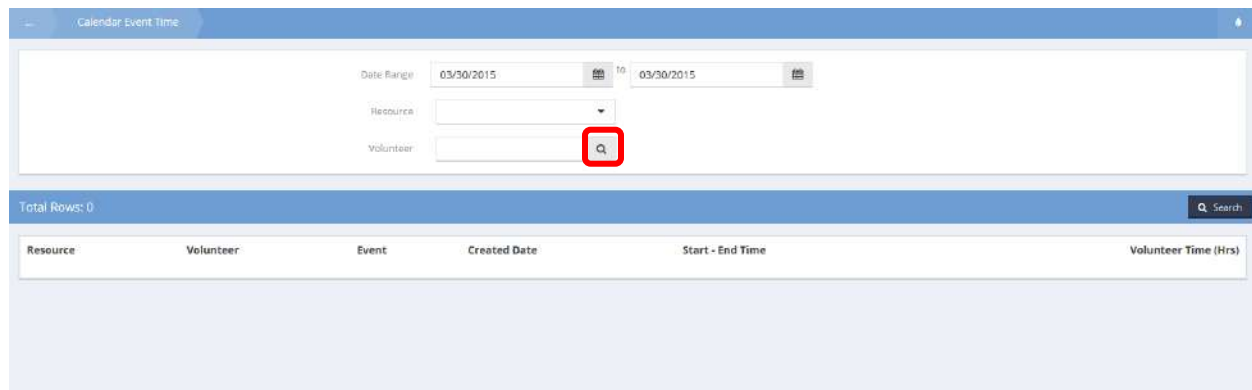
The Time Management menu contains forms that allow users to enter time against a customer project. The process includes referencing the work date, hours, pay type, customer, projects, project tasks and more. The overall approach includes entering weekly time based on a range of dates followed by a formal 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.




The screenshot shows the 'Calendar Event Time' form. At the top, there's a header bar with the title 'Calendar Event Time'. Below it, there's a search area with fields for 'Date Range' (03/30/2015 to 03/30/2015), 'Resource', and 'Volunteer'. A magnifying glass icon is highlighted with a red box next to the 'Volunteer' field. Below the search area, there's a 'Total Rows: 0' indicator and a 'Search' button. A table with columns 'Resource', 'Volunteer', 'Event', 'Created Date', 'Start - End Time', and 'Volunteer Time (Hrs)' is visible below the search area.

Click on the magnifying glass  icon next to the Volunteer field. The Volunteer Lookup form displays.



The screenshot shows the 'Find Entity Lookup' form. It has a header bar with the title 'Find Entity Lookup'. Below it, there's a search area with fields for 'Entry Type' (Choose Options...), 'Name', and 'Birth Date'. A magnifying glass icon is highlighted with a red box next to the 'Name' field. Below the search area, there's a 'Search' button.

Enter any or all of the desired volunteer name and click on the  button.

A list of matching volunteer names displays. Locate the desired name and click on it.

Find Entity Lookup

Find Entity Add New

Entity Type: choose options...

Name: test Birth Date:

Search

Name	User Name	First Name	Last Name	Entity ID	Entity Type	Birth Date	Gender
Test Org1				1312	Organization		
Test_Mama				1328	Client		
Test_Mama				1328	Client	1/1/1974	5
Test_Child1				1329	Client		
Test_Child1				1329	Client	6/5/1995	2
Testater, Jackie				1380	Client		
Testater, Jackie				1380	Client	1/1/1953	2
Testedy, James				1381	Client		

The user is returned to the Calendar Event Time form. Select a date range. Select a resource, if desired, from the drop-down list.

Calendar Event Time

Date Range: 03/01/2013 to 03/30/2015

Resource:

Volunteer: Volunteer106, Jane Search

Total Rows: 0 Search

Resource	Volunteer	Event	Created Date	Start - End Time	Volunteer Time (Hrs)
----------	-----------	-------	--------------	------------------	----------------------

Click on the Search button. The list of matching data displays

Calendar Event Time

Date Range: 03/01/2013 to 03/30/2015

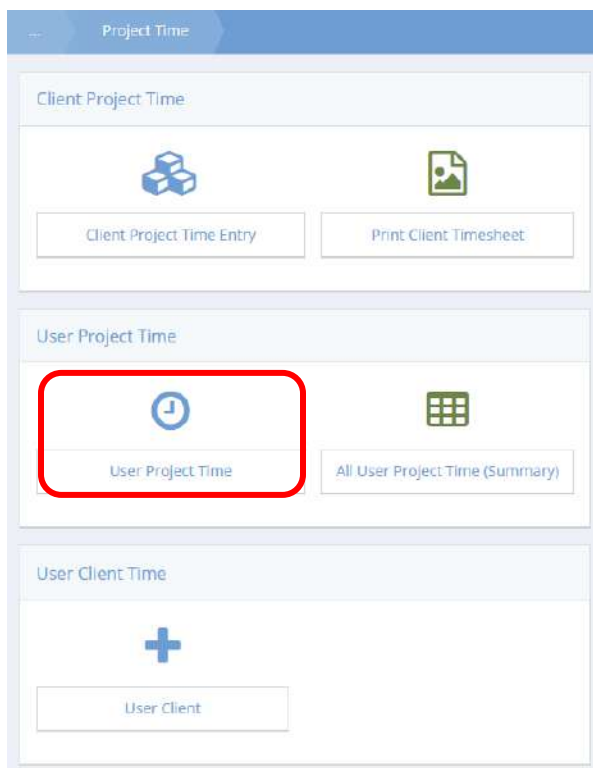
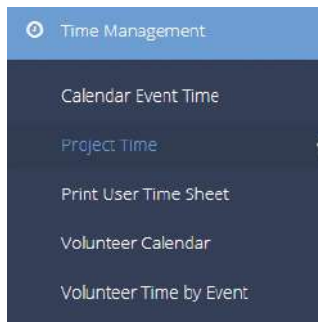
Resource:

Volunteer: Volunteer106, Jane Search

Total Rows: 1 Search

Resource	Volunteer	Event	Created Date	Start - End Time	Volunteer Time (Hrs)
	Volunteer106, Jane	Breakfast	8/11/2014	8/11/2014 - 8/11/2014	2.00
					Total: 2.00

## 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.

Summary screen showing date range (03/09/2015 to 03/09/2015) and a table with columns: Transaction Type, Transaction Date, Customer, Project, Task, Hours, Amount, Entity ID. A '+ Add New' button is highlighted in the top right.


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.

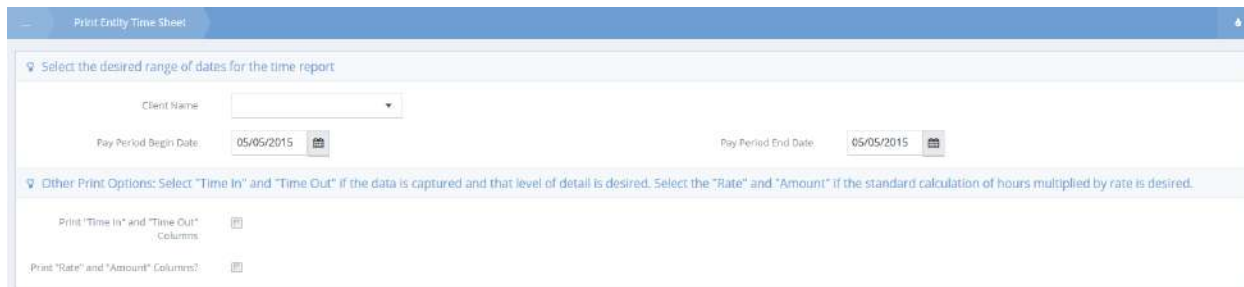
The amount calculates and displays. Click the **Save** button.

Entry screen showing date (03/09/2015) and a table with columns: Date, Customer, Project, Task, Hours, Description of Work, Pay Type, Rate, Amount, Total. A '+ Add Row' button is highlighted in the top right.

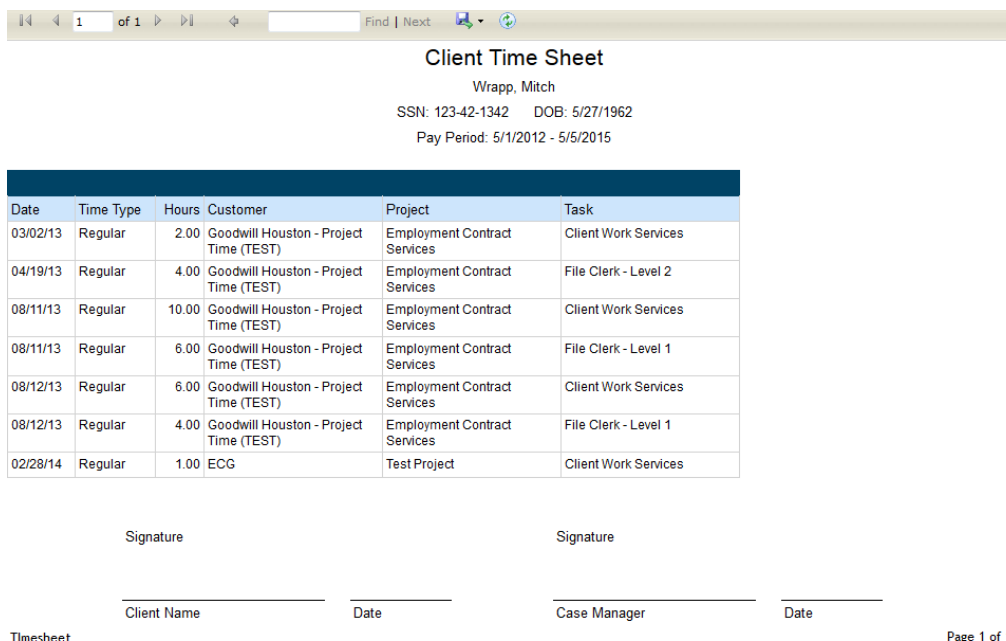
Once the hours are saved, the user is returned to the User Project Time (Summary) page. Click **Search** to verify that the hours were added to the database.

## 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

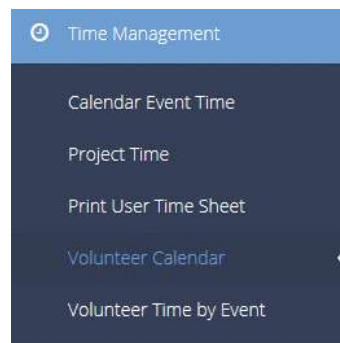
Date	Time Type	Hours	Customer	Project	Task
03/02/13	Regular	2.00	Goodwill Houston - Project Time (TEST)	Employment Contract Services	Client Work Services
04/19/13	Regular	4.00	Goodwill Houston - Project Time (TEST)	Employment Contract Services	File Clerk - Level 2
08/11/13	Regular	10.00	Goodwill Houston - 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 \_\_\_\_\_

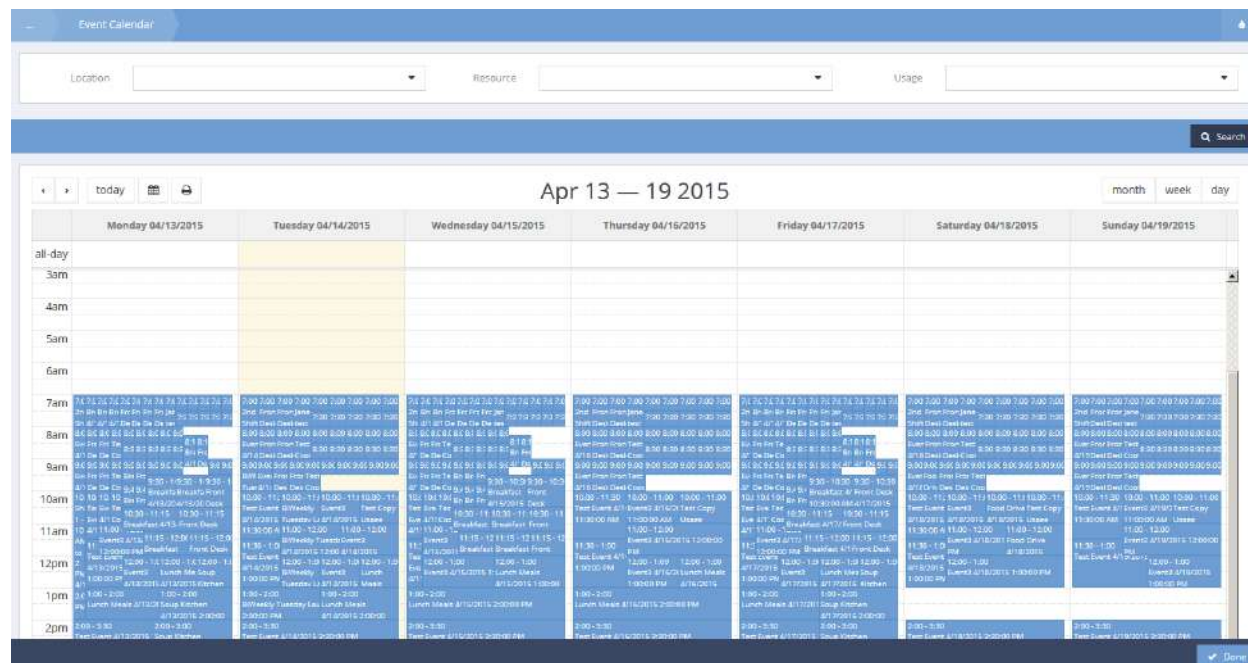
Client Name \_\_\_\_\_ Date \_\_\_\_\_ Case Manager \_\_\_\_\_ Date \_\_\_\_\_

Timesheet Page 1 of 1

## Volunteer Calendar



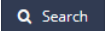
The volunteer calendar displays events for all volunteers. It is also located under Organization>Volunteers>Event Schedules / Calendar. A more in depth look at the calendar may be found in that section of this document.



## 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



Volunteer Time Summary

Event:

Total Rows: 20 Search

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

	Usage	Capacity
Health Class 2 Yaga		40
TestBRODY		50
Health Education Related to Life Skill		50
Jane Test Class		3
Test Montly Class		50
Computer Lab	Biweekly	30
Computer Lab	Last Friday of the month	30

Under the Organization tab, select Providers. A pop-up menu appears. Select Providers. The Providers Search form appears.

Provider Search

Filters

Provider


Total Rows: 619

Search

Provider	Address	Phone	Provider ID
asdgisa	123 main JOHNSTOWN, CO, 80534	555-555-5555	21883
123 main JOHNSTOWN, CO, 80534	123 main JOHNSTOWN, CO, 80534		19834
123 main JOHNSTOWN, CO, 80534	123 main JOHNSTOWN, CO, 80534		19249
123 main JOHNSTOWN, CO, 80534	123 Main Street Buda, TX, 78610		19872
123 main JOHNSTOWN, CO, 80534	1060 Andalusia Street Livermore, CA, 94550		20153
123 main JOHNSTOWN, CO, 80534	145 South Main Street Salt Lake City, UT, 84111		4144
123 main JOHNSTOWN, CO, 80534	1441 North 12th Street Phoenix, AZ, 85006	345-345-3453	12130
123 main JOHNSTOWN, CO, 80534	301 Main Street Washington, WV, 26181		3606
123 main JOHNSTOWN, CO, 80534	301 Main Street Washington, WV, 26181		20339

First 1 2 3 4 5 Last

Results Per Page: 50

Click the  icon next to a provider. Select Resources from the pop-up menu that appears. The Provider Resources form appears.

Provider Resources

Filters

Category

Resource

Total Rows: 456

Search

Resource	Resource Type	Usage	Capacity / Units	Enrolled Today	Enrollment Type	Resource ID	Usage ID
Test Facility	Manage Facility	Facility Management	0	0		2517	6336
Test Facility	Manage Facility	Prod Test Usage	0	0	4	2517	6397
Test Facility	Manage Facility	Test Facility	0	0		2517	6335
Kitchen	Work Therapy / Chores	Breakfast - Cleaning	0	1	1	2523	6378
Kitchen	Work Therapy / Chores	Breakfast - Cook	0	1	1	2523	6341
Kitchen	Work Therapy / Chores	Breakfast - Dishwasher	0	1	1	2523	6347
Kitchen	Work Therapy / Chores	Breakfast - Host	0	1	1	2523	6374
Kitchen	Work Therapy / Chores	Breakfast - Server	0	1	1	2523	6342
Kitchen	Work Therapy / Chores	BRK - Waiter	0	1	1	2523	6386

First 1 2 3 4 5 Last

Results Per Page: 50

Done

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.

Provider Search



Provider

Total Rows: 128

Search

Provider	Address	Phone	Provider ID
Adrian's Bistro	123 South Main Street SALT LAKE CITY, UT, UT, 84101		9711
	5 West 31st Street New York, NY, 10001		4029
	145 South Main Street Salt Lake City, UT, 84111		4144
	1441 North 12th Street PHOENIX, AZ, 85006	345-345-3453	3606
	211 East Ocean Boulevard Long Beach, CA, 90802		10012
	123456 Main Schenectady, NY, 12303		9865
	123 South Main Street SALT LAKE CITY, UT, 84107	801-555-1212	9998
	2468 New Hampshire Ave Concord, NH, 03309		2569
			2564
	1258 Highway 7 Schenectady, NY, 12306		4096
	1234 RALEIGH, NC, 27605		4443
	1400 West North Temple Salt Lake City, UT, 84116		4122

Resources  
Referrals To Provider  
Scan Service Posting  
Job Code  
Provider Security Release  
Contacts  
Job Opening  
Site Inspection  
Donations  
Housing Contracts  
Delete

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.

Contact Summary

Category

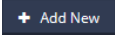
Total Rows: 220

Manage Categories Add New

Search


Name	Category Description	Work Phone	Cell Phone	Email	Category ID	Contact ID
Austin, Steve	Volunteer				1390	9848
	Volunteer				1351	9849
	Volunteer				1352	9850
	Volunteer				1353	9851
	Coordinated Assessment Contact	801-555-1212	801-555-1313	bbingel@CaseWorthy.com	182	8236
	Volunteer	801-555-1212	801-555-1313	bbingel@CaseWorthy.com	165	8236
	Volunteer	222-222-2222	111-111-1111	kallen@caseworthy.com	1445	10554
	Volunteer			bbingel@caseworthy.com	155	8209

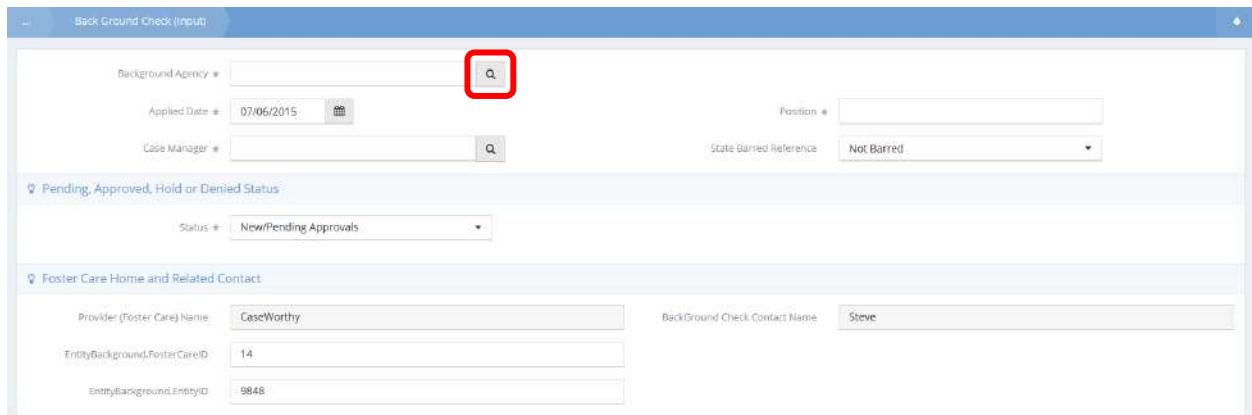
Edit  
Programs  
Demographic  
Background Check  
Credentials  
Delete

The Background Check Summary form displays. To create a new background check, click the  button.




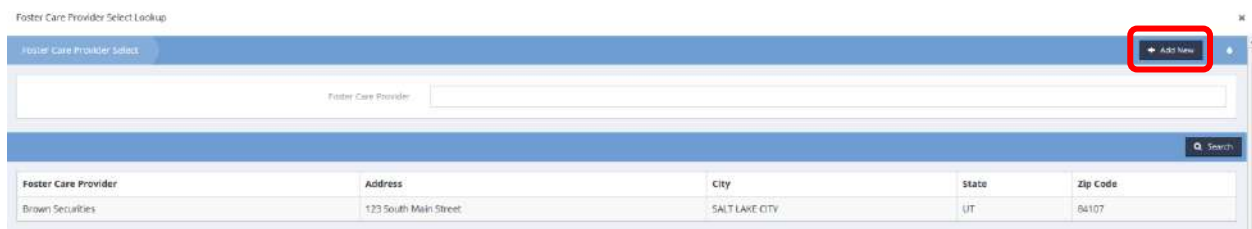
The screenshot shows the 'Background Check' summary form. At the top right, there is a blue button labeled '+ Add New' which is highlighted with a red rectangle. Below the header, there is a table with columns: Applied Date, Position, State Barred Reference, Status, Approved Date, and Background ID.

The Back Ground Check (Input) form displays. Click the magnifying glass  icon to add a Background Agency.



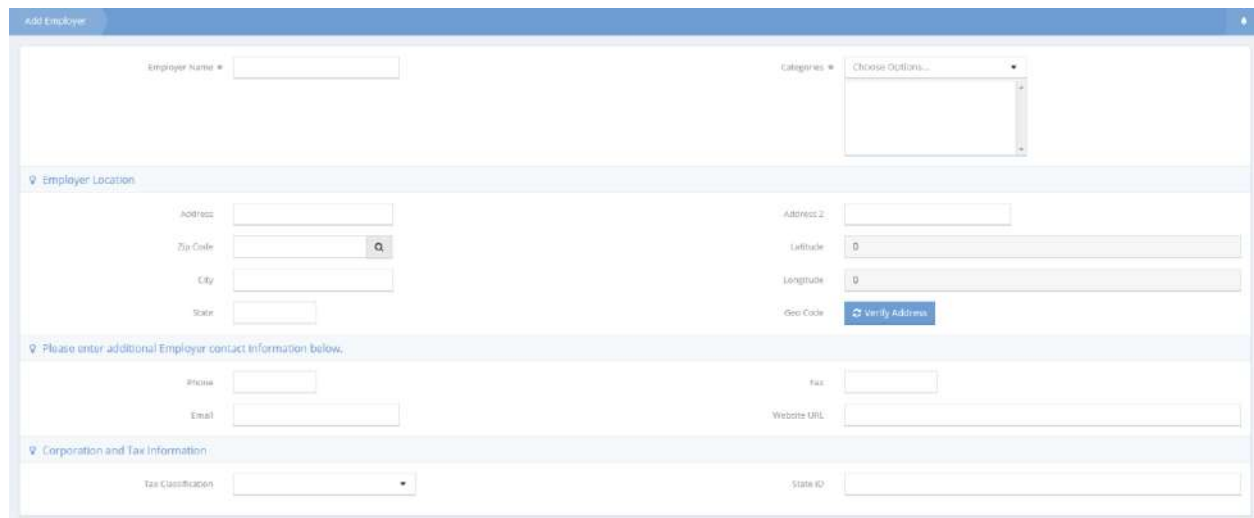
The screenshot shows the 'Back Ground Check (Input)' form. It contains several input fields: 'Background Agency' with a magnifying glass icon (highlighted with a red rectangle), 'Applied Date' (07/06/2015), 'Case Manager', 'Position', 'State Barred Reference' (Not Barred), 'Status' (New/Pending Approvals), and 'Foster Care Home and Related Contact' section with fields for 'Provider (Foster Care) Name' (CaseWorthy), 'EntityBackground.FosterCareID' (14), 'EntityBackground.EntityID' (9848), and 'BackGround Check Contact Name' (Steve).

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 screenshot shows the 'Foster Care Provider Select' lookup form. At the top right, there is a blue button labeled '+ Add New' which is highlighted with a red rectangle. Below the header, there is a search bar for 'Foster Care Provider'. Below the search bar, there is a table with columns: Foster Care Provider, Address, City, State, and Zip Code. The table contains one row: Brown Securities, 123 South Main Street, SALT LAKE CITY, UT, 84107.

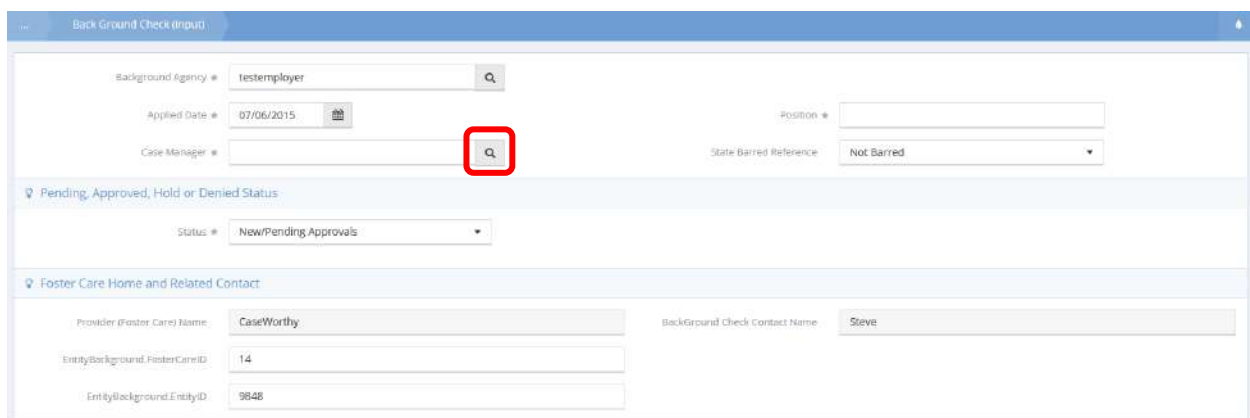
The Add Employer form displays.



The 'Add Employer' form is displayed with the following fields and sections:


- Employer Name:** A text input field.
- Categories:** A dropdown menu with 'Choose Options...' selected.
- Employer Location:** A section containing:
  - Address:** A text input field.
  - Address 2:** A text input field.
  - Zip Code:** A text input field with a magnifying glass icon.
  - Latitude:** A text input field.
  - City:** A text input field.
  - Longitude:** A text input field.
  - State:** A dropdown menu.
  - Geo Code:** A text input field.
  - Verify Address:** A blue button.
- Please enter additional Employer contact information below:** A section containing:
  - Phone:** A text input field.
  - Fax:** A text input field.
  - Email:** A text input field.
  - Website URL:** A text input field.
- Corporation and Tax Information:** A section containing:
  - Tax Classification:** A dropdown menu.
  - State ID:** A text input field.

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.



The 'Background Check Input' form is displayed with the following fields and sections:

- Background Agency:** A text input field containing 'testemployer' and a magnifying glass icon.
- Applied Date:** A date input field containing '07/06/2015' and a calendar icon.
- Position:** A text input field.
- Case Manager:** A text input field with a magnifying glass icon highlighted by a red square.
- State Barred Reference:** A dropdown menu with 'Not Barred' selected.
- Pending, Approved, Hold or Denied Status:** A section containing:
  - Status:** A dropdown menu with 'New/Pending Approvals' selected.
- Foster Care Home and Related Contact:** A section containing:
  - Provider (Foster Care) Name:** A text input field containing 'CaseWorthy'.
  - Background Check Contact Name:** A text input field containing 'Steve'.
  - EntityBackground.FosterCareID:** A text input field containing '14'.
  - EntityBackground.EntityID:** A text input field containing '9848'.

Click the magnifying glass  icon for Case Manager.

The Select Users by Org Lookup form displays.

Name	User Name
Abbott, Andrew	aaabbott
Administrator	Administrator
Ellison, Adrian	aelisson
Soay, Alfonso	Alfsoay
Kamma, Arjibabu	arjibabu
Soay, Arthur	asoy
user, auth	authuser
Ball, Brad	bball

Select a user from the list. To search for a user, enter a name into the User Name field and click the **Search** button. The user's name appears in the Case Manager field.

Background Agency: testemployer

Applied Date: 07/06/2015

Case Manager: Ellison, Adrian

Position:

State Barred Reference: Not Barred

Pending, Approved, Hold or Denied Status

Status: New/Pending Approvals

Foster Care Home and Related Contact:

Provider (Foster Care) Name: CaseWorthy

Entity(Background.FosterCareID): 14

Entity(Background.EntityID): 9848

Background Check Contact Name: Steve

Finally, enter a position in the Position field. Modify the remaining fields as necessary and click the **Save** button when finished.

Applied Date	Position	State Barred Reference	Status	Approved Date	Background ID
7/6/2015	testposition	Not Barred	New/Pending Approvals		14

The Background Check Summary form reflects the newly added info.

## Classroom Absence


**Objective:** Manage absences with the classroom resource usage for a provider.

Provider Search

Provider Name  City

Total Rows: 115 Search

Provider Name	Address	Phone
Adrian's Bistro		
Adrian's Bistro		
Apple Computers - Real	123 S. Main St. NEW YORK, NY, 10008	
Auto Zone		
Banner Health	1441 North 12th Street Phoenix, AZ, 85006	345-345-3453
Blue Power Blue Planet		

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.

Provider Search

Provider Name  City

Total Rows: 115 Search

**Resources**

- Scan Service Posting
- Job Code
- Provider Security Release
- Contacts
- Job Opening
- Donations
- Non Housing Contracts
- Housing Contracts
- Delete


Provider Name	Address	Phone
	123 S. Main St. NEW YORK, NY, 10008	
	1441 North 12th Street Phoenix, AZ, 85006	345-345-3453
Camrhone Funding	1258 Highway 7 Schenectady, NY, 12306	

The Provider Resources form displays.

Provider Resources

Category  Resource

Resource	Usage	Resource Type	Capacity / Units	Enrolled Today	Enrollment Type
SOH Facility	Dale's House	Housing Emergency	35	10	Required/Auto Enrollment
SOH Facility	first Monday of the month	Housing Emergency	2	4	Enter Enrollment Optional
SOH Facility	Like H4H	Housing Emergency	4	14	Enter Enrollment Optional
SOH Facility	Monthly Shelter Test	Housing Emergency	59	75	Required/Auto Enrollment
SOH Facility	SOH Daily Shelter	Housing Emergency	52	36	Required/Auto Enrollment
Manor Emergency Housing	Emergency Shelter Section	Housing Emergency	92	102	Enter Enrollment Optional
Manor Emergency Housing	Janie Test Row	Housing Emergency	18	27	Required/Auto Enrollment
Manor Emergency Housing	Safe Haven Section	Housing Emergency	17	15	Enter Enrollment

Click the action gear  icon associated with the desired resource and select Classroom Absence from the pop up menu that appears.

Provider Resources

Category:  Resource:

☐ Check In Manager  
☐ Reservation w/ Checkin  
☒ Check-in reservations  
☐ Roster/Checkin  
☒ Classroom Absence  
☐ Wait List  
☐ Resource Log

Usage	Resource Type	Capacity / Units	Enrolled Today	Enrollment Type
Dale's House	Housing Emergency	35	10	Required/Auto Enrollment
first Monday of the month	Housing Emergency	2	4	Enter Enrollment Optional
Like H4H	Housing Emergency	4	14	Enter Enrollment Optional
Monthly Shelter Test	Housing Emergency	59	76	Required/Auto Enrollment
SOH Facility	SOH Daily Shelter	52	36	Required/Auto Enrollment
Manor Emergency Housing	Emergency Shelter Section	90	90	Enter Enrollment Optional
Manor Emergency Housing	Jane Test Row	18	27	Required/Auto Enrollment

The Resource Usage Attendance form displays.

Resource Usage Attendance

Please don't open the form and save or clients that have already Check In will display.

Date: 01/06/2015

Event: 

Date	Time
01/06/2015- Tuesday	10:00 am-11:00 am

Event Summary: 

Min	Max	Reserved	Checked In
1	17	10	0

Total Rows: 10

Select a date and event and then click on the  button. Results display in the spreadsheet below the search parameters.

Resource Usage Attendance

Please don't open the form and save or clients that have already Check In will display.

Date: 01/06/2015

Event: 

Date	Time
01/06/2015- Tuesday	10:00 am-11:00 am

Event Summary: 

Min	Max	Reserved	Checked In
1	17	10	0

Total Rows: 10

Don't Open Form	Client	Absence Type *	Absence Reason	Notes
<input checked="" type="checkbox"/>	Ageris2, Scott1			
<input checked="" type="checkbox"/>	Davison, Ginger			
<input checked="" type="checkbox"/>	Fisk, Carlton			
<input checked="" type="checkbox"/>	Doe, John			
<input checked="" type="checkbox"/>	Karlson, Becky			
<input checked="" type="checkbox"/>	Allen, GriffinChange			
<input checked="" type="checkbox"/>	Racer, Speed			
<input checked="" type="checkbox"/>	Karlson, Karl			
<input checked="" type="checkbox"/>	Carlson, Carl			
<input checked="" type="checkbox"/>	Donaldson, Don			



To modify an absence or make notes, click the clear checkbox  next to an entry.

Resource Usage Attendance

Please don't open the form and save or clients that have already Check In will display.

Date: 01/06/2015











Event: 

Date	Time
01/06/2015- Tuesday	10:00 am-11:00 am


Event Summary: 

Min	Max	Reserved	Checked In
1	17	10	0

Total Rows: 10

Don't Open Form	Client	Absence Type *	Absence Reason	Notes
	Agerik2, Scott1	Excused		
	Davison, Ginger			
	Risk, Carlton			
	Doe, John			
	Karlson, Becky			
	Allen, GriffinChange			
	Racer, Speed			
	Karlson, Karl			
	Carlson, Carl			
	Donaldson, Don			


Save Cancel

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  Save 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.

Provider Search				
Provider <input type="text"/>				
Total Rows: 130				
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	
Carrone Funding	1258 Highway 7 Schenectady, NY, 12306		4096	
Cardinal Solutions Group	1234 RALEIGH, NC, 27605		4443	

Click on the action gear  icon for the desired provider and select Job Opening from the pop up menu that appears.

Provider Search				
Provider <input type="text"/>				
Total Rows: 130				
Provider	Address	Phone	Provider ID	
<ul style="list-style-type: none"> <li>Resources</li> <li>Referrals To Provider</li> <li>Scan Service Posting</li> <li>Job Code</li> <li>Provider Security Release</li> <li>Contacts</li> <li><b>Job Opening</b></li> <li>Site Inspection</li> <li>Donations</li> <li>Housing Contracts</li> <li>Delete</li> </ul>			2564	
	1258 Highway 7 Schenectady, NY, 12306		4096	
	1234 RALEIGH, NC, 27605		4443	
	1400 West North Temple Salt Lake City, UT, 84116		4122	
	740 East 3900 South Salt Lake City, UT, 84107	801-888-9999	14	
			8472	
			8473	
			8431	
	2401 Lake Park Drive Smyrna, GA, 30080		5556	
	1501 North Classen Boulevard Oklahoma City, OK, 73106	405-523-3000	129	
Cathy's Congregate Dining			2563	

The All Job Openings form displays.

CaseWorthy


05/08/2015 to 05/08/2015

Benefits Type

Status: Open

Search

Description	Employer	Begin - End Date	Begin - End Salary	Benefits Type
-------------	----------	------------------	--------------------	---------------

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.

CaseWorthy


05/08/2015 to 05/08/2015

Benefits Type

Status: Open

Search

Description	Employer	Begin - End Date	Begin - End Salary	Benefits Type
job	CaseWorthy	5/6/2015 - 5/31/2015		

Click on the action gear  icon for the desired job opening and select Client Matches from the pop up menu that appears.

CaseWorthy

05/08/2015 to 05/08/2015

Benefits Type

Status: Open


Search

- Edit
- Skills & Credentials
- Crimes
- Key Words
- Client Matches
- Delete

Description	Employer	Begin - End Date	Begin - End Salary	Benefits Type
job	CaseWorthy	5/6/2015 - 5/31/2015		

The Job Match – Client List form displays a list of clients whose qualifications match the job requirements.


Job Match - Client List						
Total Rows: 3						
Client Name	Client Email	Match Quality Level	Match Level Reason	Employer Status	Client Status	Qualifications
John, Little		High		Pending Review	Pending Review	
Walters, Wendy		High		Pending Review	Pending Review	
Draper, Sally		High		Pending Review	Pending Review	

Click on the action gear  icon associated with the desired client and select Update Employer Status from the pop up menu that appears.

Job Match - Client List						
Total Rows: 3						
	Client Email	Match Quality Level	Match Level Reason	Employer Status	Client Status	Qualifications
<ul style="list-style-type: none"> <li>Update Employer Status</li> </ul>		High		Pending Review	Pending Review	
		High		Pending Review	Pending Review	
		High		Pending Review	Pending Review	

The Update Employer Status - Job Match Edit form displays.

Edit Job Match: Employer Status Update			
Job Match Information			
Employer	CaseWorthy	Job Title	valet
Client Status	Pending Review	Close Date	9/30/2015
Update Status			
Employer Status	Pending Review		


Click on the down arrow for Employer Status and select the desired value from the drop-down list that appears. Click on the  Save 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.


Provider Search			
Provider: <input type="text"/>			
Total Rows: 125			
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
Bonner 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

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.

Provider Search			
Provider: <input type="text"/>			
Total Rows: 125			
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
 Resources	145 South Main Street Salt Lake City, UT, 84111		4144
 Referrals To Provider	1441 North 12th Street PHOENIX, AZ, 85006	345-345-3453	3606
 Scan Service Posting	211 East Ocean Boulevard Long Beach, CA, 90802		10012
 Job Code			9865
 Provider Security Release	123 South Main Street SALT LAKE CITY, UT, 84107	801-555-1212	9998
 Contacts			2569
 Job Opening			2564
 Site Inspection	1258 Highway 7 Schenectady, NY, 12306		4096
 Donations	1234 RALEIGH, NC, 27605		4443
 Non Housing Contracts	1400 West North Temple Salt Lake City, UT, 84116		4122
 Housing Contracts	740 East 3900 South Salt Lake City, UT, 84107	801-888-9999	14
 Delete			8472
CaseWorthy - Sub Provider A			

Select Resources. A list of resources for that provider displays. Refine the list by selecting a category from the drop-down list.


Resource	Resource Type	Enrollment Type	Capacity / Units	Enrolled Today
SOH Facility	Housing Emergency	Required/Auto Enrollment	35	9
SOH Facility	Housing Emergency	Enter Enrollment Optional	2	4
SOH Facility	Housing Emergency	Enter Enrollment Optional	4	14
SOH Facility	Housing Emergency	Required/Auto Enrollment	59	76
SOH Facility	Housing Emergency	Required/Auto Enrollment	52	36
Manor Emergency Housing	Housing Emergency	Enter Enrollment Optional	104	127
Manor Emergency Housing	Housing Emergency	Required/Auto Enrollment	19	27

Click the action gear  for the specific resource and select Reservation w Checkin.

Usage	Resource Type	Enrollment Type	Capacity / Units	Enrolled Today
Dale's House	Housing Emergency	Required/Auto Enrollment	35	9
first Monday of the month	Housing Emergency	Enter Enrollment Optional	2	4
Like H4H	Housing Emergency	Enter Enrollment Optional	4	14
Monthly Shelter Test	Housing Emergency	Required/Auto Enrollment	59	76
SOH Daily Shelter	Housing Emergency	Required/Auto Enrollment	52	36
Emergency Shelter Section	Housing Emergency	Enter Enrollment Optional	104	127

The Reservations with Check-in form appears.

Client #	Start - End Date #	Check Client In?
----------	--------------------	------------------

Verify the reservation dates and click on the  button.

All reservations for the resource appear.

Reservations-Assign Slot New

Reservation Date Between: 04/01/2015 to 04/30/2015

Total Rows: 35

Client *	Slot	Start Date *	End Date *	Check Client In?
<input checked="" type="checkbox"/> Allen, Elizabeth	bed107	10/23/2014	Present	
<input checked="" type="checkbox"/> Barker, Avery	Single Bed	11/13/2014	Present	
<input checked="" type="checkbox"/> Beard, Frank	Single Bed	10/30/2014	Present	
<input checked="" type="checkbox"/> Brady, Tom	ES Bed 5	9/12/2014	Present	
<input checked="" type="checkbox"/> Claire, Button	115	3/11/2015	Present	
<input checked="" type="checkbox"/> Crosby, Larry	Bunk Bed	4/2/2015	4/2/2015	
<input checked="" type="checkbox"/> Gibson, Ben	ES Bed 37	4/1/2015	Present	
<input checked="" type="checkbox"/> Johnson, Cathy	Single Bed	4/1/2015	4/2/2015	
<input checked="" type="checkbox"/> Johnson, Charlie	Single Bed	4/1/2015	4/2/2015	
<input checked="" type="checkbox"/> Johnson, Tammy	Single Bed	4/1/2015	4/2/2015	

Click on the **+ Add Row** button. The expanded row displays.

Reservations-Assign Slot New

Reservation Date Between: 04/01/2015 to 04/30/2015

Total Rows: 35

Client *	Slot	Start Date *	End Date *	Check Client In?
<input checked="" type="checkbox"/> Allen, Elizabeth	bed107	10/23/2014	Present	
<input checked="" type="checkbox"/> Barker, Avery	Single Bed	11/13/2014	Present	
<input checked="" type="checkbox"/> Beard, Frank	Single Bed	10/30/2014	Present	
<input checked="" type="checkbox"/> [Redacted]	ES Bed 5	04/01/2015	12/31/9999	
Enrollment: <input type="text"/> Client Lease: <input type="text"/> <input type="button" value="Delete"/>				
<input checked="" type="checkbox"/> Claire, Button	115	3/11/2015	Present	

Click on the Client Name field. The Find Client with Reservation Information Lookup form displays.

Find Client with Reservation Information Lookup

Last Name:  First Name:  Name:   
 Birth Date:  Scan Card ID:

Enter the client name or a portion thereof and click on the **Search** button.

A list of matching clients displays.

Find Client with Reservation Information Lookup

Find Client with Reservation Information

Last Name:  First Name:  Name:   
 Birth Date:  Scan Card ID:

Total Rows: 5

Name	Current Reserved In	Bar Program	Bar Aiken Service	Bar Enroll Ser.	Birth Date	Start Date	End Date	Resource ID
Bosell, April					4/19/1970			
Bosell, Steven Jr.					5/22/2000			
Bosell, April Jr.					4/17/2004			
Bosell, Steve	Safe Haven Section				1/22/1969	4/1/2015	Present	56

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.

Reservations-Assign Slot New

Reservation Date Between: 04/01/2015 to 04/30/2015

Total Rows: 35

Client *	Slot	Start Date *	End Date *	Check Client In?
<input checked="" type="checkbox"/> Allen, Elizabeth	bed107	10/23/2014	Present	
<input checked="" type="checkbox"/> Barker, Avery	Single Bed	11/13/2014	Present	
<input checked="" type="checkbox"/> Beard, Frank	Single Bed	10/30/2014	Present	
<input checked="" type="checkbox"/> Bosell, Steve	ES Bed 5	04/01/2015	12/31/9999	<input checked="" type="checkbox"/>

Enrollment:

Client Lease:

Delete

Click on the  Save button.

In the background, CaseWorthy™ has logged the housing service.

Services Summary

Date	Program	Service	Unit Of Measure	Units	Unit Value	Total	Service ID
4/16/2015	Common Intake	AA Meeting	1/4 Hours (15 Min Intervals)	1.00	0.00	0.00	1214534
4/16/2015	12 Permanent Housing for Homeless Disabled	Administrative Time	Each	1.00	1.00	1.00	1214521
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	Adoption Registry	Each	1.00	1.00	1.00	1214522
4/16/2015	12 Permanent Housing for Homeless Disabled	Adoption Registry	Each	1.00	1.00	1.00	1214526



The Housing Check-In History table on the Class and Housing History dashboard also shows the service

Class, Housing and Event History

Class Room

Reservations Attendance Absences Coordinated Assessment Beds

Housing

Reservations Check-ins Absences

Housing Check-in History

Begin Date - End Date	Usage	Resource	Slot
04/01/2015 - 04/01/2015	Safe Haven Section	Manor Emergency Housing	Shaven Bed 7
04/01/2015 - 04/01/2015	Safe Haven Section	Manor Emergency Housing	Shaven Bed 7
04/01/2015 - 04/01/2015	Safe Haven Section	Manor Emergency Housing	Shaven Bed 7


Housing Reservations:


Begin Date - End Date	Resource	Usage	Slot
04/01/2015 - 12/31/9999	Manor Emergency Housing	Safe Haven Section	Shaven Bed 8
04/01/2015 - 01/01/1900	Manor Emergency Housing	Safe Haven Section	Shaven Bed 7

## 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.

Provider Search			
Provider: <input type="text"/>			
Total Rows: 125			
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
Cattlin's Cupboard			2569
Camille's Congregate Dining			2564
Camrone Funding	1258 Highway 7 Schenectady, NY, 12306		4096
Cardinal Solutions Group	1234 RALEIGH, NC, 27605		4443

Select Resources from the pop-up menu when the action gear  icon to the left of the desired provider is clicked.

Provider Search			
Provider: <input type="text"/>			
Total Rows: 125			
Provider	Address	Phone	Provider ID
<div>  <ul style="list-style-type: none"> <li>Resources</li> <li>Referrals To Provider</li> <li>Scan Service Posting</li> <li>Job Code</li> <li>Provider Security Release</li> <li>Contacts</li> <li>Job Opening</li> <li>Site Inspection</li> <li>Donations</li> <li>Non Housing Contracts</li> <li>Housing Contracts</li> <li>Delete</li> </ul> </div>	123 Main Street Austin, TX, 78704		9711
	5 West 31st Street New York, NY, 10001		4029
	145 South Main Street Salt Lake City, UT, 84111		4144
	1441 North 12th Street PHOENIX, AZ, 85006	345-345-3453	3606
	211 East Ocean Boulevard Long Beach, CA, 90802		10012
			9865
	123 South Main Street SALT LAKE CITY, UT, 84107	801-555-1212	9998
			2569
			2564
	1258 Highway 7 Schenectady, NY, 12306		4096
	1234 RALEIGH, NC, 27605		4443

The Provider Resources form displays.

Provider Resources

CaseWorthy

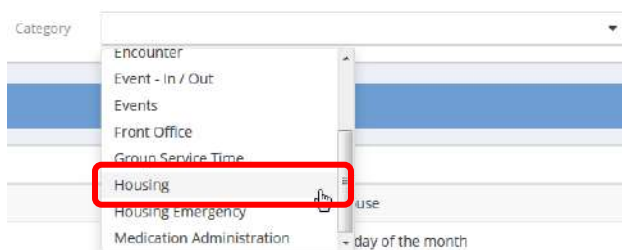
Category

Resource

Total Rows: 43

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.

Provider Resources

CaseWorthy


Category

Housing

RESOURCES

Total Rows: 5

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.

Provider Resources CaseWorthy

Category: Housing Resource:

Total Rows: 5

	Usage	Resource Type	Enrollment Type	Capacity / Units	Enrolled Today
Check in Manager	Permanent Supportive Housing	Housing		16	13
Roster/Checkin	Single Room Occupancy	Housing		23	12
Classroom Absence	Manor Apartments - 1st Floor (Sales Training)	Housing		20	4
Wait List	SOH - Perm. Supportive Housing	Housing		13	6
Resource List	F D Test	Housing		16	


Pop-up menu options: Check in Manager, Roster/Checkin, Classroom Absence, Wait List, Resource List, **Housing** (highlighted), Add Resource.

The Emergency Housing Usage form appears.

Emergency Housing Usage

Total Rows: 23


Resource Name	Usage	Usage Label	Resource Type	Enrollment Type	Capacity / Units	Enrolled Today
Single Room Occupancy	One Bedroom Jane	A102	Housing	Required/Auto Enrollment	2	1
Single Room Occupancy	One Bedroom Cam	A104	Housing	Required/Auto Enrollment	1	
Single Room Occupancy	One Bedroom 2nd	A106	Housing	Required/Auto Enrollment	1	
Single Room Occupancy	Two Bedroom4 Cam	A101	Housing	Enter Enrollment	4	6
Single Room Occupancy	Two Bedroom5	A105	Housing	Required/Auto Enrollment	2	1
Single Room Occupancy	Two Bedroom6	A103	Housing	Enter Enrollment	5	3
Single Room Occupancy	One Bedroom	A108	Housing	Required/Auto Enrollment	1	
Single Room Occupancy	One Bedroom	A110	Housing	Required/Auto Enrollment	1	
Single Room Occupancy	One Bedroom	A114	Housing	Required/Auto Enrollment	1	
Single Room Occupancy	One Bedroom	A112	Housing	Required/Auto Enrollment	1	
Single Room Occupancy	Two Bedroom1	A107	Housing	Required/Auto Enrollment	1	
Single Room Occupancy	Two Bedroom2	A109	Housing	Required/Auto Enrollment	1	
Single Room Occupancy	Two Bedroom3	A111	Housing	Required/Auto Enrollment	1	
Single Room Occupancy	One Bedroom	A116	Housing	Required/Auto Enrollment	1	

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.

Emergency Housing Usage

Total Rows: 23

Resource Name	Usage	Usage Label	Resource Type	Enrollment Type	Capacity / Units	Enrolled Today
 Reservation w Checkin	One Bedroom Jane	A102	Housing	Required/Auto Enrollment	2	1
<input checked="" type="checkbox"/> Check-in reservations	One Bedroom Cam	A104	Housing	Required/Auto Enrollment	1	
 Roster/Checkin	One Bedroom 2nd	A106	Housing	Required/Auto Enrollment	1	
<input checked="" type="checkbox"/> Wait List	Two Bedroom4 Cam	A101	Housing	Enter Enrollment	4	6
 Resource Log	Two Bedroom5	A105	Housing	Required/Auto Enrollment	2	1
 Housing Check-in	Two Bedroom6	A103	Housing	Enter Enrollment	5	3
 Availability Report	One Bedroom	A108	Housing	Required/Auto Enrollment	1	
 Check-in Roster Report	One Bedroom	A110	Housing	Required/Auto Enrollment	1	
 Housing Exception	One Bedroom	A114	Housing	Required/Auto Enrollment	1	


The Reservations – Assign Slot New form displays. Click on the  Search button to see existing and previous reservations for this room.

Reservations with Check-in


+ Add Row

Reservation Date Between: 04/05/2015 to 04/11/2015

Total Rows: 1

 Search

Client *	Start - End Date *	Check Client in?
<input checked="" type="checkbox"/> Allen, Rita	11/4/2014 - Present	


Click on the  Add Row button to create a reservation. A new, expanded row appears.


Reservations with Check-in


+ Add Row


Reservation Date Between: 04/05/2015 to 04/11/2015

Total Rows: 1


 Search

Client *	Start - End Date *	Check Client in?
<input checked="" type="checkbox"/> 		


Locker:  

Lease Lookup:  

Enrollee Rent Amount:

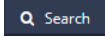


<input checked="" type="checkbox"/> Allen, Rita	11/4/2014 - Present	
-------------------------------------------------	---------------------	--

Click on the magnifying glass icon  for Client. The Find Client with Reservation Information Lookup form opens.



The screenshot shows the 'Find Client with Reservation Information Lookup' form. It has a blue header bar with the title and an 'Add New' button. Below the header, there are input fields for 'Last Name', 'First Name', 'Name', 'Birth Date', and 'Scan Card ID'. A red box highlights the 'Search' button in the bottom right corner.

Enter search criteria, such as the first few letters of the last name, and click the  button.

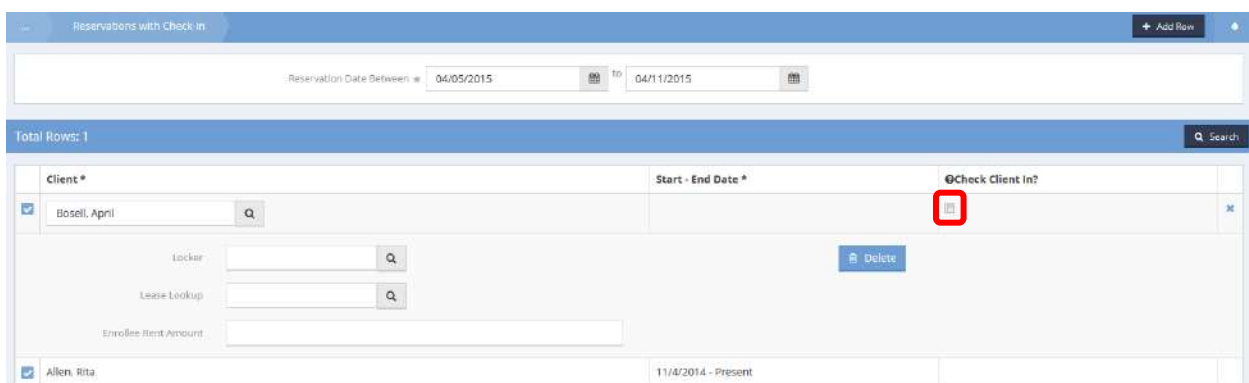
A list of matching names displays.




The screenshot shows the same form as before, but now it displays search results. The 'Last Name' field contains 'Bosell'. Below the form, a table lists the results. The table has columns: Name, Current Reserved In, Bar Program, Bar Attend Service, Bar Enroll Ser., Birth Date, Start Date, End Date, and Resource ID.



Name	Current Reserved In	Bar Program	Bar Attend Service	Bar Enroll Ser.	Birth Date	Start Date	End Date	Resource ID
Bosell, April					4/19/1970			
Bosell, Steven Jr.					5/22/2000			
Bosell, April Jr.					4/17/2004			
Bosell, Steve	Safe Haven Section				1/22/1969	4/1/2015	Present	56

Select the desired client by clicking on the associated row.



The screenshot shows the 'Reservations with Check In' form. It has a blue header bar with the title and an 'Add Row' button. Below the header, there is a date range selector for 'Reservation Date Between' with dates '04/05/2015' and '04/11/2015'. Below that, a table lists reservations. The table has columns: Client \*, Start - End Date \*, Check Client In?, and a delete button. The first row shows 'Bosell, April' with a checked 'Check Client In?' checkbox, which is highlighted with a red box. Below the table, there are fields for 'Locker', 'Lease-Lookup', and 'Enrollment Rent Amount'.

Client *	Start - End Date *	Check Client In?	
Bosell, April		<input checked="" type="checkbox"/>	

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  button.

To verify the reservation and check in, navigate to the client's housing history dashboard (Case Management>Client Information>Class and Housing History).

Class, Housing and Event History

Class Room

Reservations

Absences

Attendance

Coordinated Assessment Beds

Housing

Reservations

Absences

Check-ins

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

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	12 Permanent Housing for Homeless Disabled	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	1214079
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	1213984

## 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.

The screenshot shows the 'Provider Search' interface. At the top, there is a search bar labeled 'Provider:'. Below it, a blue bar indicates 'Total Rows: 125'. A table lists providers with columns for Provider, Address, Phone, and Provider ID. A red box highlights the 'Resources' option in the pop-up menu that appears when the gear icon is clicked on the first provider row.

Provider	Address	Phone	Provider ID
Adriana Berto	123 Main Street Austin, TX, 78704		9711
Resources	5 West 31st Street New York, NY, 10001		4029
Referrals To Provider	145 South Main Street Salt Lake City, UT, 84111		4144
Scan Service Posting	1441 North 12th Street PHOENIX, AZ, 85006	345-345-3453	3606
Job Code	211 East Ocean Boulevard Long Beach, CA, 90802		10012
Provider Security Release			9865
Contacts			
Job Opening	123 South Main Street SALT LAKE CITY, UT, 84107	801-555-1212	9998
Site Inspection			2569
Donations			2564
Non Housing Contracts	1258 Highway 7 Schenectady, NY, 12306		4096
Housing Contracts	1234 RALEIGH, NC, 27605		4443
Delete	1400 West North Temple Salt Lake City, UT, 84116		4122

Select Resources from the pop-up menu that appears.



The Provider Resources form displays.

Provider Resources


CaseWorthy

Category

Resource

Total Rows: 43

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 H&H	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
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

Locate the desired resource and click on the action gear  icon associated with it.

Provider Resources

CaseWorthy

Category

Resources

Total

Check In Manager

Roster/Checkin

Classroom Absence

Wait List

Resource Log

Housing

	Usage	Resource Type	Enrollment Type	Capacity / Units	Enrolled Today
(Sales Training)	Manor Apartments - 1st Floor (Sales Training)	Housing		20	4
	Single Room Occupancy	Housing		23	12
	SOH - Perm. Supportive Housing	Housing		13	6
	F D Test	Housing		16	





Select Housing from the pop-up menu that appears. The Emergency Housing Usage form displays.

Emergency Housing Usage

Total Rows: 20

	Resource Name	Usage	Usage Label	Resource Type	Enrollment Type	Capacity / Units	Enrolled Today
	Manor Apartments - 1st Floor (Sales Training)	Rooms	Rm 1003	Housing	Required/Auto Enrollment	4	
	Manor Apartments - 1st Floor (Sales Training)	Rooms	Rm 1001	Housing	Enter Enrollment Optional	2	
	Manor Apartments - 1st Floor (Sales Training)	Rooms	Rm 1005	Housing	Enter Enrollment Optional	1	
	Manor Apartments - 1st Floor (Sales Training)	Rooms	Rm 1007	Housing	Enter Enrollment Optional	1	
	Manor Apartments - 1st Floor (Sales Training)	Rooms	Rm 1009	Housing	Enter Enrollment Optional	1	
	Manor Apartments - 1st Floor (Sales Training)	Rooms	Rm 1011	Housing	Enter Enrollment Optional	1	
	Manor Apartments - 1st Floor (Sales Training)	Rooms	Rm 1013	Housing	Enter Enrollment Optional	1	
	Manor Apartments - 1st Floor (Sales Training)	Rooms	Rm 1015	Housing	Enter Enrollment Optional	1	
	Manor Apartments - 1st Floor (Sales Training)	Rooms	Rm 1017	Housing	Enter Enrollment Optional	1	

Locate the desired Resource Name and click on the action gear  associated with it.

Emergency Housing Usage							
Total Rows: 20							
Resource Name	Usage	Usage Label	Resource Type	Enrollment Type	Capacity / Units	Enrolled Today	
Manor Apartments - 1st Floor (Sales Training)	Rooms	Rm 1003	Housing	Required/Auto Enrollment		4	
 Reservation w/ Check-In (Sales Training)	Rooms	Rm 1001	Housing	Enter Enrollment Optional		2	
 Check-In reservations (Sales Training)	Rooms	Rm 1005	Housing	Enter Enrollment Optional		1	
 Roster/Check-In (Sales Training)	Rooms	Rm 1007	Housing	Enter Enrollment Optional		1	
 Wait List (Sales Training)	Rooms	Rm 1009	Housing	Enter Enrollment Optional		1	
 Resource Log (Sales Training)	Rooms	Rm 1011	Housing	Enter Enrollment Optional		1	
 Housing Check-In (Sales Training)	Rooms	Rm 1013	Housing	Enter Enrollment Optional		1	
 Availability Report (Sales Training)	Rooms	Rm 1015	Housing	Enter Enrollment Optional		1	
 Check-In Roster Report (Sales Training)	Rooms	Rm 1017	Housing	Enter Enrollment Optional		1	
 <b>Housing Exception</b> (Sales Training)	Rooms	Rm 1021	Housing	Enter Enrollment Optional		1	


Select Housing Exception from the pop-up menu that appears. The Excuse Unexcuse Summary New form displays. From this form, add or edit absences.

Excuse Unexcuse Summary New				+ Add New				
Date: 04/01/2015	Event: <table border="1"><tr><th>Date</th><th>Time</th></tr><tr><td>04/01/2015</td><td>All day</td></tr></table>	Date	Time	04/01/2015	All day	Event Summary		
Date	Time							
04/01/2015	All day							
<div>Search</div>								

## 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.

Provider Search			
Provider: <input type="text"/>			
Total Rows: 125			
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
Coltin's Cupboard			2569

Select Resources from the pop-up menu when the action gear  icon to the left of the desired provider is clicked.

Provider Search			
Provider: <input type="text"/>			
Total Rows: 125			
Resources	Address	Phone	Provider ID
Referrals To Provider	123 Main Street Austin, TX, 78704		9711
Scan Service Posting	5 West 31st Street New York, NY, 10001		4029
Job Code	145 South Main Street Salt Lake City, UT, 84111		4144
Provider Security Release	1441 North 12th Street PHOENIX, AZ, 85006	345-345-3453	3606
Contacts	211 East Ocean Boulevard Long Beach, CA, 90802		10012
Job Opening			9865
Site Inspection	123 South Main Street SALT LAKE CITY, UT, 84107	801-555-1212	9998
Donations			2569
Non Housing Contracts			2564
Housing Contracts	1258 Highway 7 Schenectady, NY, 12306		4096
Delete			



Click on the action gear  to the left of the desired resource. Select "Housing" from the pop-up menu that displays.

Provider Resources CaseWorthy

Category: Housing Resource:

Total Rows: 5

	Usage	Resource Type	Enrollment Type	Capacity / Units	Enrolled Today
Check In Manager	Permanent Supportive Housing	Housing		16	11
Roster/Checkin	Single Room Occupancy	Housing		23	12
Classroom Absence	Manor Apartments - 1st Floor (Sales Training)	Housing		20	4
Wait List	SOH - Perm. Supportive Housing	Housing		13	6
Resources List	F D Test	Housing		16	


Pop-up menu options: Check In Manager, Roster/Checkin, Classroom Absence, Wait List, Resources List, **Housing** (highlighted).

The Emergency Housing Usage form appears.

Emergency Housing Usage








Total Rows: 16

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.

Emergency Housing Usage

Total Rows: 16

	Usage	Usage Label	Resource Type	Enrollment Type	Capacity / Units	Enrolled Today
	Overflow (Room 210)	Rm 210	Housing	Required/Auto Enrollment	5	
	Two Bedroom 1	Rm 201	Housing	Required/Auto Enrollment	5	1
	Two Bedroom	Rm 203	Housing	Enter Enrollment Optional	4	
	One Bedroom Rm 200	Rm 200	Housing	Required/Auto Enrollment	2	3
	One Bedroom Rm 202	Rm 202	Housing	Required/Auto Enrollment	1	1
	One Bedroom Rm 204	Rm 204	Housing	Required/Auto Enrollment	2	1
	Three Bedroom	Rm 205	Housing	Required/Auto Enrollment	2	2
	Three Bedroom	Rm 207	Housing	Enter Enrollment	2	

The Excuse Unexcuse Summary New form displays.

Excuse Unexcuse Summary New

+ Add New

Date: 04/01/2015

Event: Date Time

04/01/2015- All day

Event Summary

Search

Click on the **+ Add New** button, then Click on the **Search** button. A list of reservations displays.

Add Absence

Date: 04/01/2015

Event: Date Time


04/01/2015- All day

Event Summary

Min	Max	Reserved	Checked in
1	4	1	1

Total Rows: 1

Search

Client	Slot Name	Absence Type *
 Cliente, Nuevo	Slot	


Select the desired reservation and click on the clear checkbox ☒ to the left of the name.


The row expands to allow absence entry.


<b>Client</b>	<b>Slot Name</b>	<b>Absence Type *</b>
<input checked="" type="checkbox"/> Cliente, Nuevo	Slot	Excused
Begin Date *	End Date *	
Emergency Contact *	Last Name *	
Reason *	Notes *	
Service Begin Date	Service End Date	


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.

<b>Client</b>	<b>Slot Name</b>	<b>Absence Type *</b>
<input checked="" type="checkbox"/> Cliente, Nuevo	Slot	Excused
Begin Date *	End Date *	
Emergency Contact *	Last Name *	
Reason *	Notes *	
Service Begin Date	Service End Date	

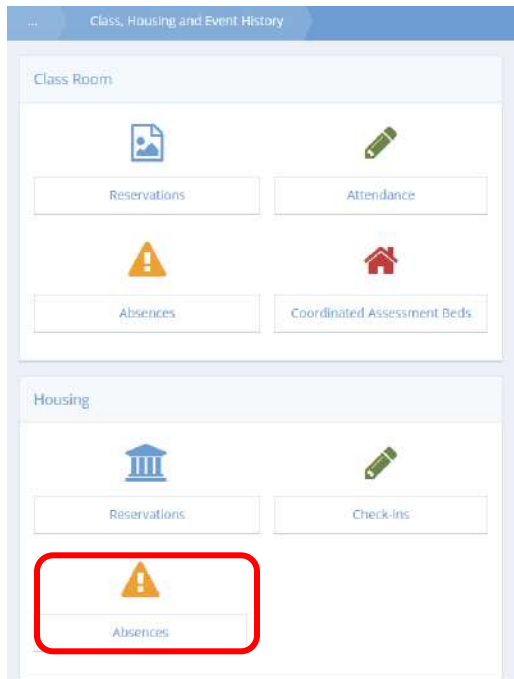
Click on the  Save button. The summary form returns.

Excuse Unexcuse Summary New			+ Add New				
Date *	Event *	Event Summary					
04/01/2015	<table border="1"> <tr> <th>Date</th> <th>Time</th> </tr> <tr> <td>04/01/2015</td> <td>All day</td> </tr> </table>	Date	Time	04/01/2015	All day		
Date	Time						
04/01/2015	All day						
							

Click the  Search button. The absence now appears in the list.

Excuse Unexcuse Summary New			+ Add New												
Date *	Event *	Event Summary													
04/01/2015	<table border="1"> <tr> <th>Date</th> <th>Time</th> </tr> <tr> <td>04/01/2015</td> <td>All day</td> </tr> </table>	Date	Time	04/01/2015	All day	<table border="1"> <tr> <th>Min</th> <th>Max</th> <th>Reserved</th> <th>Checked in</th> </tr> <tr> <td>1</td> <td>4</td> <td>1</td> <td>1</td> </tr> </table>		Min	Max	Reserved	Checked in	1	4	1	1
Date	Time														
04/01/2015	All day														
Min	Max	Reserved	Checked in												
1	4	1	1												
															
<b>Client</b>	<b>Slot Name</b>	<b>Absence Type</b>	<b>Begin - End Date</b>	<b>Notes</b>											
<input checked="" type="checkbox"/> Cliente, Nuevo	Slot	Excused	4/15/2015 - 4/16/2015	client whereabouts are currently unknown											

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

Provider Search

Provider:

Total Rows: 140

Search

Provider	Address	Phone	Provider ID
Adrian's Bistro	123 South Main Street Salt Lake City, UT, 84101		9711
	5 West 31st Street New York, NY, 10001		4029
	145 South Main Street Salt Lake City, UT, 84111		4144
			12130
	1441 North 12th Street Phoenix, AZ, 85006	345-345-3453	3606
	211 East Ocean Boulevard Long Beach, CA, 90802		10012
	111 South 1st Street Austin, TX, 78704	111-111-1111	11842
	123456 Main Schenectady, NY, 12303		9865
	123 South Main Street SALT LAKE CITY, UT, 84107	801-555-1212	9998
	2468 New Hampshire Ave Concord, NH, 03303		2569
			2564
	1258 Highway 7 Schenectady, NY, 12306		4096

Resources

Contacts

Referrals To Provider

Scan Service Posting

Projects

Job Code


Provider Security Release

Job Opening

Donations

Housing Contracts

Delete

Locate the desired provider, click the action gear  and click Resources. The Provider Resources form displays.

Provider Resources

Category:  Resource:

Total Rows: 113

Search

Resource	Resource Type	Usage	Capacity / Units	Enrolled Today	Resource ID	Usage ID
In and Out Class	In / Out	All Children - Ages 1 to 17		16	1110	2503
In and Out Class	Event - In / Out	House of Fun - Ages 8 to 14		16	1110	2502
In and Out Class	Event - In / Out	Juniors - Ages 8 to 10		16	1110	2501
In and Out Class	Event - In / Out	Kindergarten - Ages 5 to 6		16	1110	2500
In and Out Class	Event - In / Out	Toddlers - Ages 3 to 4		16	1110	2499
ARC - Day Care Center, Smith Street	Event - In / Out	Day Care Services		2	1180	4884
Medication Administration	Medication Administration	Evening		56	1109	2494
Medication Administration	Medication Administration	Midday		56	1109	2493
Medication Administration	Medication Administration	Monday		56	1109	2574
Medication Administration	Medication Administration	Monthly 16th		56	1109	2573
Medication Administration	Medication Administration	Morning		56	1109	2492
Medication Administration	Medication Administration	Post-meal		56	1109	2534

housing emergency

Events

Front Office

Cemetery

Encounter

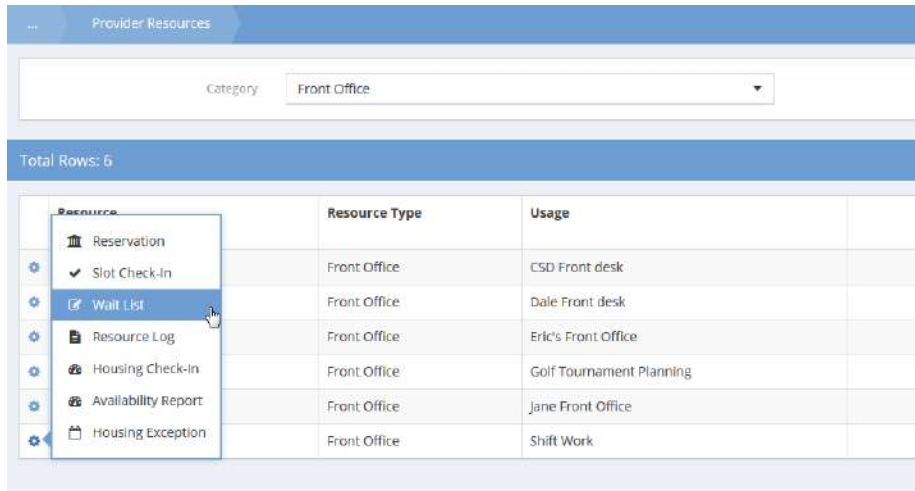
Group Service Time

Medication Administration

Event - In / Out


Select Front Office from the Category drop-down list and click the  button.

The list filters for Front Office resources.



The screenshot shows the 'Provider Resources' interface. At the top, there is a 'Category' dropdown menu set to 'Front Office'. Below this, a blue bar indicates 'Total Rows: 6'. A table lists resources with columns for 'Resource', 'Resource Type', and 'Usage'. The 'Resource' column has a dropdown menu open, showing options: 'Reservation', 'Slot Check-In', 'Wait List' (highlighted), 'Resource Log', 'Housing Check-In', 'Availability Report', and 'Housing Exception'. The table data is as follows:

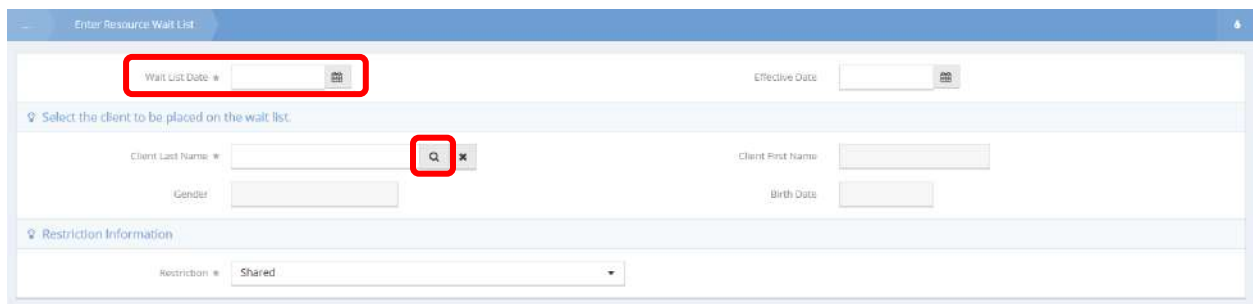
Resource	Resource Type	Usage
CSD Front desk	Front Office	CSD Front desk
Dale Front desk	Front Office	Dale Front desk
Eric's Front Office	Front Office	Eric's Front Office
Golf Tournament Planning	Front Office	Golf Tournament Planning
Jane Front Office	Front Office	Jane Front Office
Shift Work	Front Office	Shift Work

On the desired resource, click the action gear  and click Wait List. The Usage Wait List form displays.




The screenshot shows the 'Usage Wait List' form. At the top right, there is a '+ Add New' button highlighted with a red box. Below the header, there are four input fields: 'Created Date', 'Effective Date', 'Client Name', and 'Restriction'.

Click the **+ Add New** button. The Enter Resource Wait List form displays.



The screenshot shows the 'Enter Resource Wait List' form. At the top right, there is a '+ Add New' button highlighted with a red box. Below the header, there are several input fields and sections:

- 'Wait List Date' field with a calendar icon and a magnifying glass icon (highlighted with a red box).
- 'Effective Date' field with a calendar icon.
- 'Select the client to be placed on the wait list.' section with fields for 'Client Last Name', 'Client First Name', 'Gender', and 'Birth Date'. The 'Client Last Name' field has a magnifying glass icon (highlighted with a red box).
- 'Restriction Information' section with a 'Restriction' dropdown menu set to 'Shared'.

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.

Provider Search

Provider

Total Rows: 123 Q Search


















Provider	Address	Phone	Provider ID
Adrian's Bistro	123 Main Street Austin, TX, 78704		9711
 Resources	5 West 31st Street New York, NY, 10001		4029
 Referrals To Provider	145 South Main Street Salt Lake City, UT, 84111		4144
 Scan Service Posting	1441 North 12th Street PHOENIX, AZ, 85006	345-345-3453	3606
 Job Code	211 East Ocean Boulevard Long Beach, CA, 90802		10012
 Provider Security Release			9865
 Contacts			9998
 Job Opening	123 South Main Street SALT LAKE CITY, UT, 84107	801-555-1212	2569
 Site Inspection			2564
 Donations			4096
 Non Housing Contracts	1258 Highway 7 Schenectady, NY, 12306		4443
 Housing Contracts	1234 RALEIGH, NC, 27605		4122
 Delete	1400 West North Temple Salt Lake City, UT, 84116		14
CaseWorthy	740 East 3900 South Salt Lake City, UT, 84107	801-888-9999	

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.

Provider Resources CaseWorthy

Category  Resource

Total Rows: 43

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
  Check In Manager	Emergency Shelter Section	Housing Emergency	Enter Enrollment Optional	103	120
  Reservation w Checkin	Jane Test Row	Housing Emergency	Required/Auto Enrollment	19	27
  Check-in reservations	Safe Haven Section	Housing Emergency	Enter Enrollment	17	21
  Roster/Checkin	Test Montly House	Housing Emergency	Required/Auto Enrollment	2	12
  Wait List	TH 1	Housing Emergency	Required/Auto Enrollment	3	1
  Resource Log	Transitional Housing Section	Housing Emergency	Enter Enrollment Optional	14	34
	Permanent Supportive Housing	Housing		15	11

Reservation with Check-in: Select a start and end date for the reservation and click Q 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.

Reservations with Check-in

Total Rows: 8

Client *	Start - End Date *	Check Client In?
<input type="text"/>		<input type="checkbox"/>
Locker: <input type="text"/>		
Lease Lookup: <input type="text"/>		
Enroll Rent Amount: <input type="text"/>		
<input checked="" type="checkbox"/> Davison, Ginger	11/26/2014 - Present	

Check-in Reservations: Select the event date, then choose the client in need of check-in.

The screenshot displays the 'Resource Usage Attendance' interface. At the top, the 'Date' is set to 03/11/2015. A red box highlights the 'Event' section, which shows the date 03/11/2015-Wednesday and the time 10:00 am-11:00 am. To the right, an 'Event Summary' table provides a breakdown of reservations.

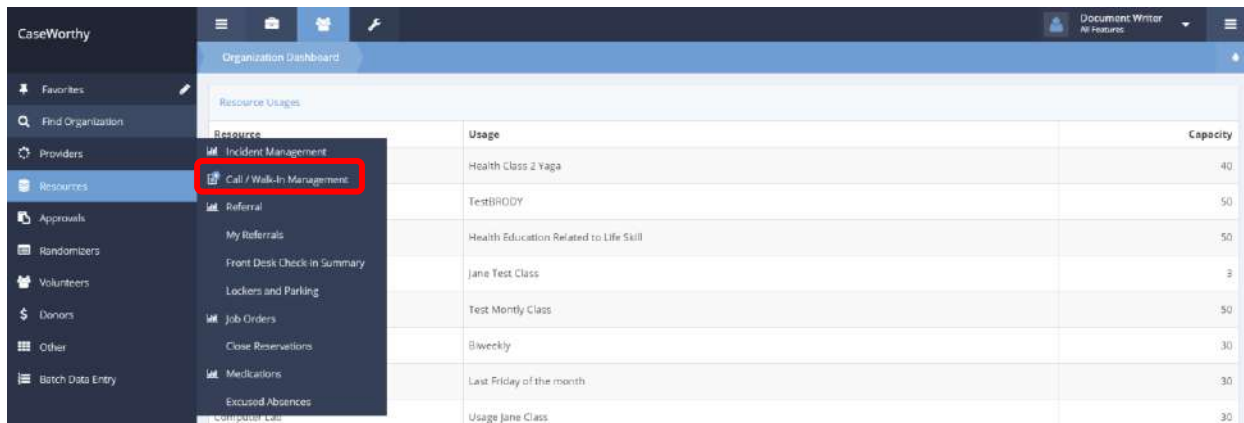
Min	Max	Reserved	Checked in
1	17	8	0

Below the event details, a blue bar indicates 'Total Rows: 8'. The main table lists clients, with 'Davison, Ginger' highlighted by a red box. The 'Client' column shows the name, and the 'Slot' column shows 'Bunk Bed'. The 'End Reservation' button is visible at the bottom of the table.

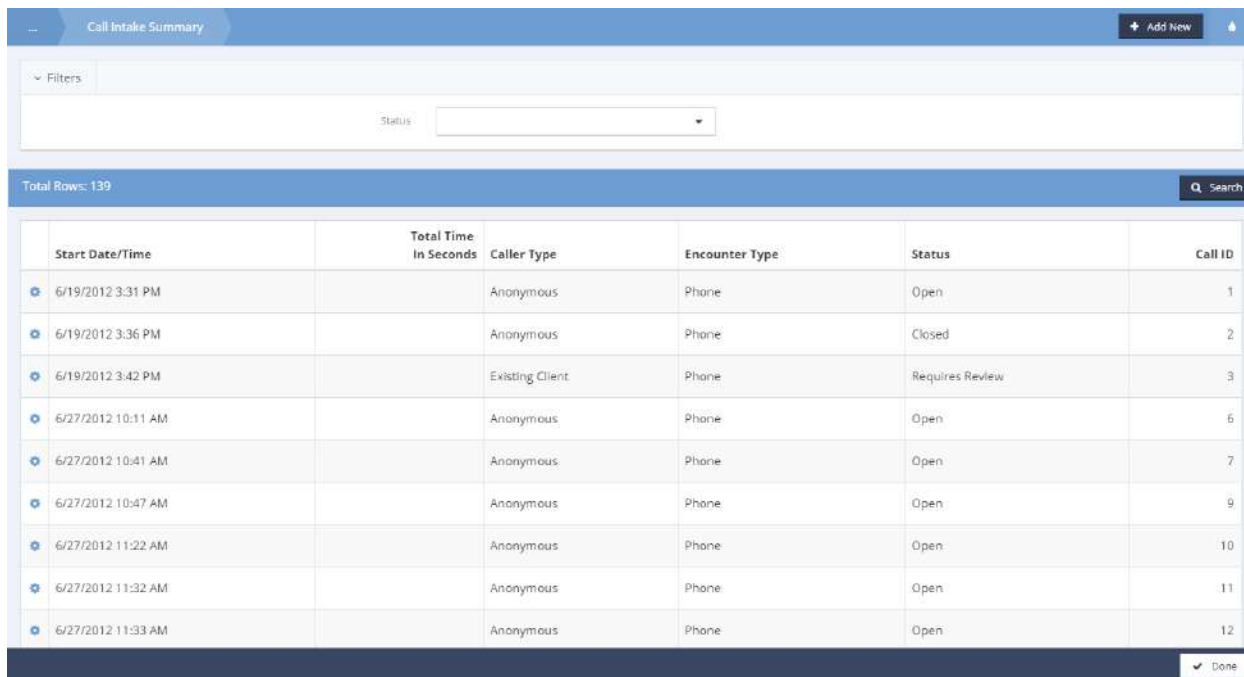
## Call Center (Add) New

**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 **+ Add New** button to add a new call.  
The Add Call form appears.

**Add Call**

Anonymous callers call on behalf of a client.  
Existing Client callers call on their own behalf, or on behalf of another client.  
Friend and Relative callers always call on behalf of a client.  
New Client callers call on their own behalf, but can't call on behalf of another client.

Time: Call Time  
00:00:20  
Stop

Type of Caller: Existing Client

Encounter Type: Phone

Last Name: [Text Box]

First Name: [Text Box]

Cell Phone: [Text Box]

Reason for Call: [Text Box]

Caller General Information: [Text Box]


Call Note: [Rich Text Editor]

Status: Open

Restriction: Shared

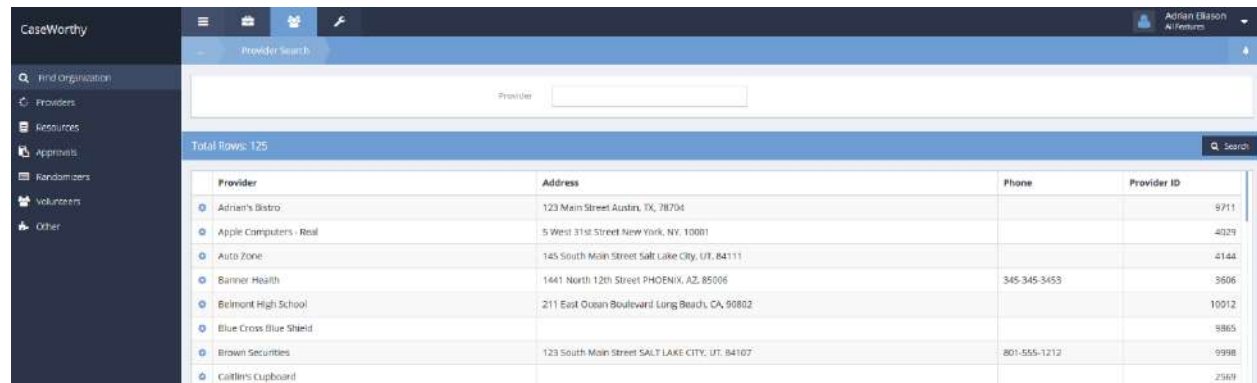
Words: 0

Save Cancel



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.

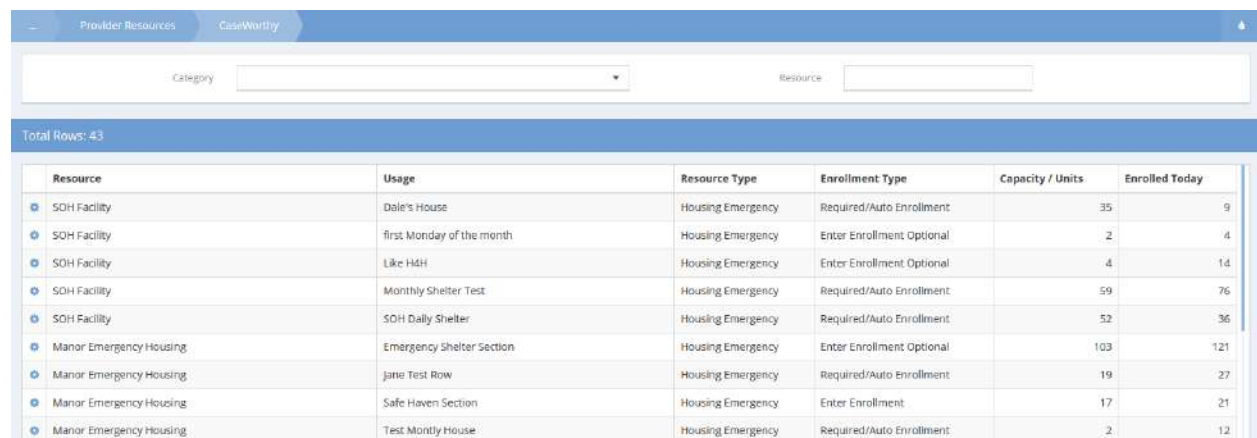
## Check In Manager

**Objective:** Reserve, check-in, check-out, show an absence or change the location for clients within a user friendly graphical representation of resources.




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		2144
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
Catkins Cupboard			2549

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.



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 H&H	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	103	121
Manor Emergency Housing	Jane Test Row	Housing Emergency	Required/Auto Enrollment	19	27
Manor Emergency Housing	Safe Haven Section	Housing Emergency	Enter Enrollment	17	21
Manor Emergency Housing	Test Montly House	Housing Emergency	Required/Auto Enrollment	2	12










Select Check-In Manager from action gear  drop-down menu.

Provider/Resource CaseWorthy


Category  Resource

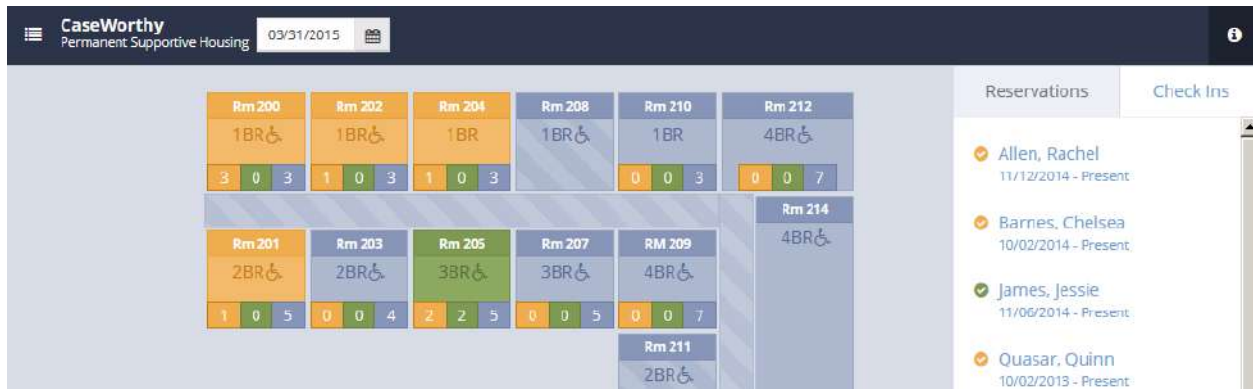
Total Rows: 43

Resource	Usage	Resource Type	Enrollment Type	Capacity / Units	Enrolled Today
SOH Facility	Dale's House	Housing Emergency	Required/Auto Enrollment	35	9
 Check In Manager	first Monday of the month	Housing Emergency	Enter Enrollment Optional	2	4
 Roster/Checkin	Like H4H	Housing Emergency	Enter Enrollment Optional	4	14
 Check-In	Monthly Shelter Test	Housing Emergency	Required/Auto Enrollment	59	76
 Roster/Checkin	SOH Daily Shelter	Housing Emergency	Required/Auto Enrollment	52	36
 Classroom Absence	Emergency Shelter Section	Housing Emergency	Enter Enrollment Optional	103	121
 Wait List	Jane Test Row	Housing Emergency	Required/Auto Enrollment	19	27
 Resource Log	Safe Haven Section	Housing Emergency	Enter Enrollment	17	21
Manor Emergency Housing	Test Montly House	Housing Emergency	Required/Auto Enrollment	2	12

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.

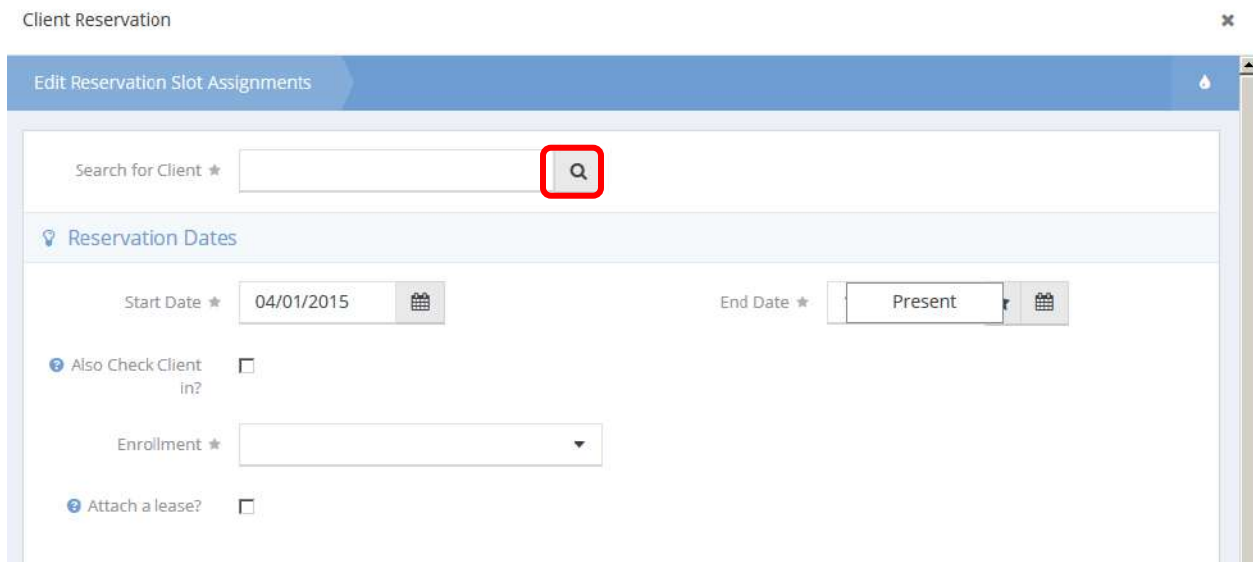


The interface shows a grid of room reservations for various rooms (Rm 200, Rm 202, Rm 204, Rm 208, Rm 210, Rm 212, Rm 201, Rm 203, Rm 205, Rm 207, Rm 209, Rm 211, Rm 214). Each room card displays the room number, bed count, and a status icon. A sidebar on the right lists clients with reservations and check-ins:


Client	Check In	Check Out
Allen, Rachel	11/12/2014	Present
Barnes, Chelsea	10/02/2014	Present
James, Jessie	11/06/2014	Present
Quasar, Quinn	10/02/2013	Present

## 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.



The Client Reservation form includes the following fields and options:

- Edit Reservation Slot Assignments** (Header)
- Search for Client** (Text input with a magnifying glass icon  highlighted by a red box)
- Reservation Dates** (Section header)
- Start Date** (Text input: 04/01/2015)
- End Date** (Text input: Present)
- Also Check Client In?** (Checkbox: ☐)
- Enrollment** (Text input)
- Attach a lease?** (Checkbox: ☐)

Click on the magnifying glass  icon to search for the desired client.

The Search for Client Lookup form displays.


Find Client with Reservation Information Lookup

Find Client with Reservation Information + Add New

Last Name

First Name

Name

Birth Date  

Scan Card ID

Search

Enter any or all of the desired client name and click on the Search button. The filtered list appears.


Find Client with Reservation Information Lookup

Find Client with Reservation Information + Add New

Last Name

First Name

Name

Birth Date  

Scan Card ID

Total Rows: 4 Search

Name	Current Reserved In	Bar Program	Bar Atten Service	Bar Enroll Ser.	Birth Date	Start Date	End Date	Re:
Bosell, Steve					1/22/1969			
Bosell, April					4/19/1970			

Select the desired client by clicking on the row.

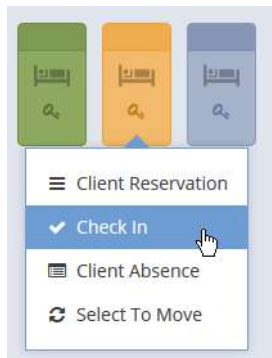
Enter the range of dates for the reservation. Select the program enrollment from the drop-down list and if desired, check-in the client and attach a lease by checking the check boxes.

The screenshot shows a web application window titled "Client Reservation" with a close button (X) in the top right corner. Below the title bar is a blue header with the text "Edit Reservation Slot Assignments" and a refresh icon. The main content area has a search bar labeled "Search for Client" with a star icon, containing the text "Bosell, Steve" and a magnifying glass icon. Below the search bar is a section titled "Reservation Dates" with a light blue background. It contains two date pickers: "Start Date" with the value "04/01/2015" and a calendar icon, and "End Date" with a dropdown menu showing "Present" and a calendar icon. Below these are two checkboxes: "Also Check Client in?" which is checked, and "Attach a lease?" which is unchecked. A dropdown menu for "Enrollment" is set to "Shelter Plus Care".

Click on the **Save** button. The Check-in Manager form displays. Click on the **Refresh** button. The reservation appears on the form.

The screenshot shows the "Manor Emergency Housing" interface. The top header includes the text "Manor Emergency Housing" and "Safe Haven Section". To the right of this are several filters: a date "04/01/2015" with a calendar icon, a status filter "S O CA", and two buttons: "Reservation/Slot Assignment" and "Reserved Check In". The main area displays a grid of bed slots. Each slot is represented by a colored square with a bed icon and a letter "Q" with a subscript "2". A tooltip is visible over one of the orange slots, displaying the text: "SHaven Bed 8", "Reserved", "Bosell, Steve", and "04/01/2015 - Present". A hand cursor is pointing at the orange slot in the tooltip.

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.

Check In ✕

Edit Resource Usage 🔥

Event ★	Date	Time
	04/01/2015-Wednesday	06:00 pm-07:00 pm

Event Summary

Client

Slot

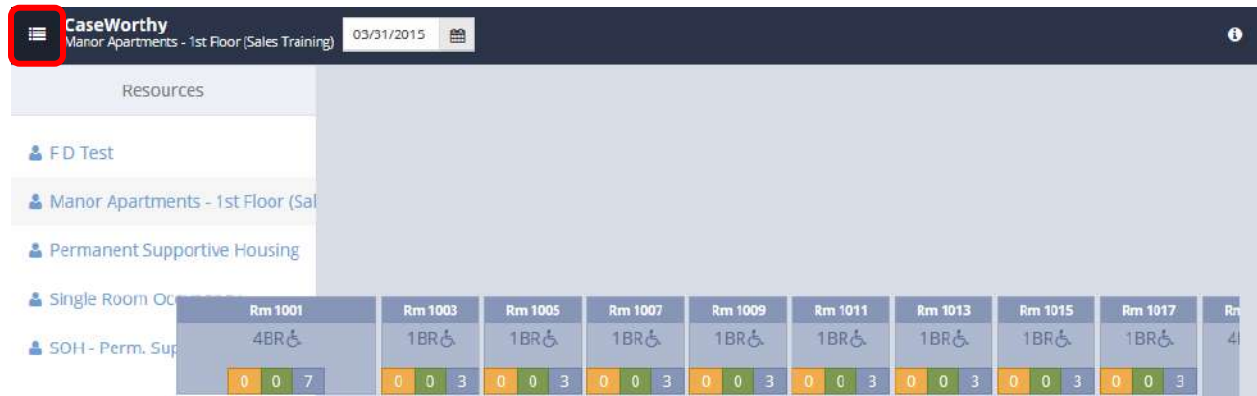
End Reservation ☒

Date ★

Click on the  Save button.

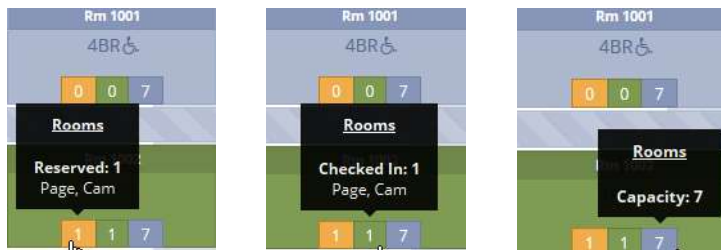
Check in a client by clicking on the orange check mark circle next to the client name.

Selecting the tabular data icon  on the upper left of the form displays related resources.



Room	Room Type	Reserved	Checked In	Capacity
Rm 1001	4BR	0	0	7
Rm 1003	1BR	0	0	3
Rm 1005	1BR	0	0	3
Rm 1007	1BR	0	0	3
Rm 1009	1BR	0	0	3
Rm 1011	1BR	0	0	3
Rm 1013	1BR	0	0	3
Rm 1015	1BR	0	0	3
Rm 1017	1BR	0	0	3

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.



Room	Room Type	Reserved	Checked In	Capacity
A101	2BR	6	0	5
A105	2BR	1	0	5
A103	2BR	3	0	5
A102	1BR	1	0	3
A108	1BR	0	0	3

## 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.

Check In ✕

Resource Usage Attendance-Enrollment 🔍

Date ★ 03/01/2015 📅 Event ★

Date	Time	Event Summary
03/01/2015-	All day	

🔍 Search

Click on the 🔍 Search button. The clients with reservations for the room display.

Check In ✕

Resource Usage Attendance-Enrollment 🔍


Date ★ 03/01/2015 📅 Event ★

Date	Time	Event Summary	Min	Max	Reserved	Checked In
03/01/2015-	All day		0	5	1	0

🔍 Search

Client	Slot Name	Standard Rent	Rent	Amount Paid
<input checked="" type="checkbox"/> Allen, Rita	Slot	\$0.00	\$0.00	\$0.00


Click on the clear checkbox ☒ next to the client checking in.

Click on the  Save button in the lower right corner of the form.

Check In ✕

---

Resource Usage Attendance-Enrollment


Date \* 03/01/2015  Event \* 

Date	Time
03/01/2015-	All day

 Event Summary

Min	Max	Reserved	Checked In
0	5	1	0

---

 Search

	Client	Slot Name	Standard Rent	Rent	Amount Paid
<input checked="" type="checkbox"/>	Allen, Rita	Slot	0.00	0.00	


End Reservation ☐

Enrollment ID

### Client Check Out

If the client is already checked in, Check Out is one of the menu options.

Rm 203	Rm 205	Rm 207
2BR 	3BR 	3BR 
0 0 4	2 2 5	0 0 5

-  Reserve
-  Housing Exception
-  Check-out
-  Select To Move

To check out a client, select the Check Out option by clicking on it.




The Check-out form displays.


Check-out ✕

---

**Housing Check Out** 🔍

---

Date ★   Event ★

	Date	Time
	03/01/2015-	All day


Event Summary

---

🔍 Search

---

	Client	Slot Name	End Reservation	Standard Rent	Rent	Amount Paid	
<input checked="" type="checkbox"/>	James, Jessie	Slot		\$0.00	\$0.00	\$0.00	
<input checked="" type="checkbox"/>	Test, Jane110	Slot	<input checked="" type="checkbox"/>	0.0000	0.00		

Reservation End Date  

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.

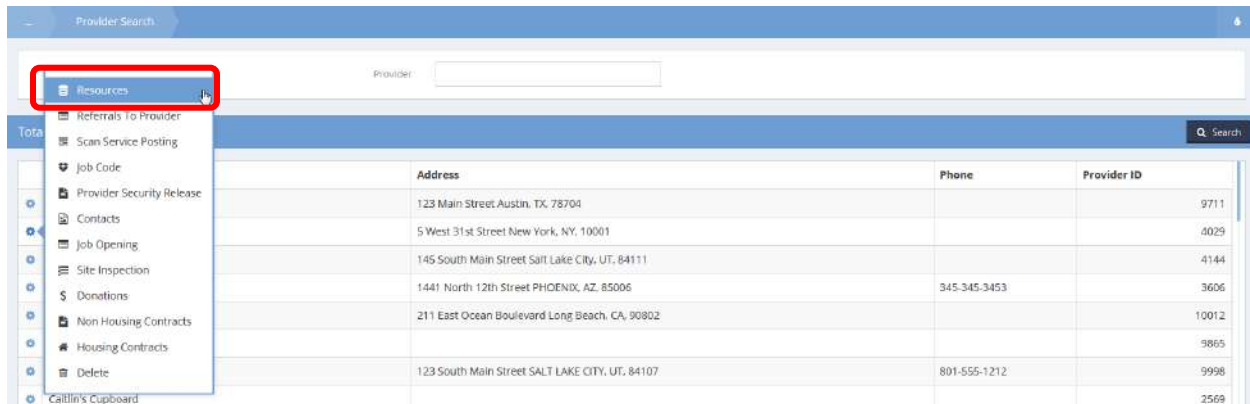


Locate the desired provider and Click on the action gear  icon to the left of the provider name.

A screenshot of the 'Provider Search' interface. At the top, there is a search bar with the placeholder text 'Provider:'. Below the search bar, a blue bar indicates 'Total Rows: 125' and a 'Search' button. The main content is a table with four columns: Provider, Address, Phone, and Provider ID. The table lists several providers, each with a gear icon to its left.

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

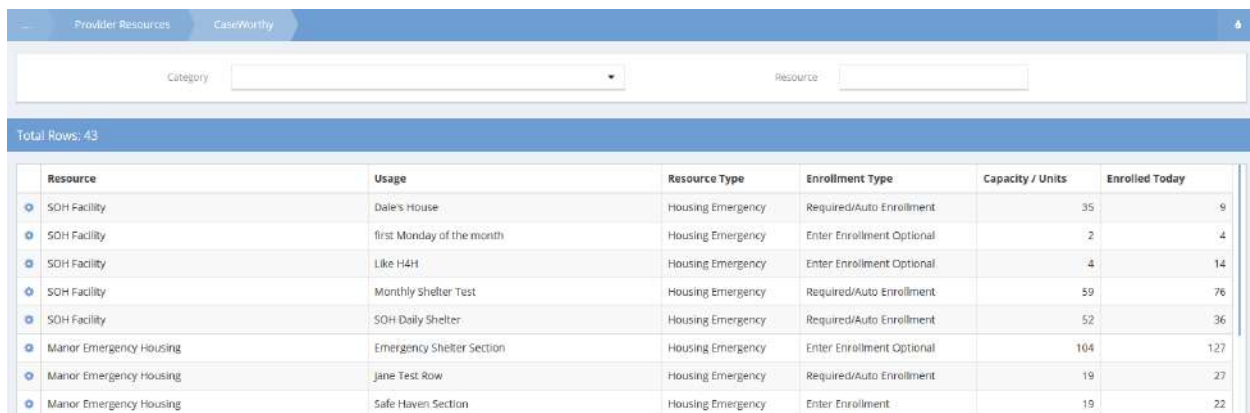
Select Resources from the pop-up menu that appears.



The screenshot shows the 'Provider Search' interface. A dropdown menu is open, and the 'Resources' option is highlighted with a red box. The background table displays provider information:


Address	Phone	Provider ID
123 Main Street Austin, TX, 78704		9711
5 West 31st Street New York, NY, 10001		4029
145 South Main Street Salt Lake City, UT, 84111		4144
1441 North 12th Street PHOENIX, AZ, 85006	345-345-3453	3606
211 East Ocean Boulevard Long Beach, CA, 90802		10012
		9865
123 South Main Street SALT LAKE CITY, UT, 84107	801-555-1212	9998
		2569

The Provider Resources form displays.



The screenshot shows the 'Provider Resources' form. It includes a search bar with 'Category' and 'Resource' dropdowns. Below the search bar, it indicates 'Total Rows: 43'. The main table displays resource details:

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
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

Locate the desired resource and click on the action gear  associated with it.

Select Check-In Manager from the pop-up menu that displays.

Provider Resources CaseWorthy

Category:  Resource:

Total Rows: 43

Resource	Usage	Resource Type	Enrollment Type	Capacity / Units	Enrolled Today
SOH Facility	Dale's House	Housing Emergency	Required/Auto Enrollment	35	9
<b>Check In Manager</b>	first Monday of the month	Housing Emergency	Enter Enrollment Optional	2	4
Reservation with Check-In	Like H4H	Housing Emergency	Enter Enrollment Optional	4	14
Check-In	Monthly Shelter Test	Housing Emergency	Required/Auto Enrollment	59	76
Roster/Checkin	SOH Daily Shelter	Housing Emergency	Required/Auto Enrollment	52	36
Classroom Absence	Emergency Shelter Section	Housing Emergency	Enter Enrollment Optional	104	127
Wait List	Jane Test Row	Housing Emergency	Required/Auto Enrollment	19	27
Resource Log	Safe Haven Section	Housing Emergency	Enter Enrollment	19	22
Manor Emergency Housing	Test Monthly House	Housing Emergency	Required/Auto Enrollment	2	12

The Check-In Manager form opens in a new window. Locate the desired room and click on it.

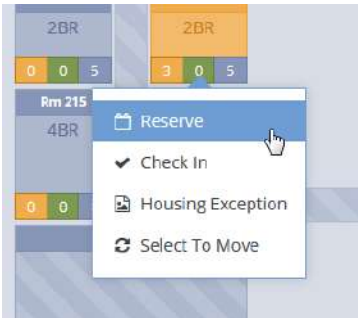
CaseWorthy  
Permanent Supportive Housing 04/06/2015

Rm 200 1BR 4 0 3	Rm 202 1BR 1 0 3	Rm 204 1BR 1 0 3	Rm 206 1BR 0 0 3	Rm 210 1BR 0 0 3	Rm 212 4BR 0 0 7
Rm 201 2BR 1 0 5	Rm 203 2BR 0 0 4	Rm 205 3BR 2 2 5	Rm 207 3BR 0 0 5	Rm 209 4BR 0 0 7	Rm 214 4BR 0 0 10
1BR 0 0 1				Rm 211 2BR 0 0 5	Rm 216 2BR 3 0 5
				Rm 213 2BR 0 0 5	Rm 218 2BR 0 0 5
				Rm 215 4BR 0 0 8	
				Rm 212A 4BR	

Reserved Checked In Capacity Handicap Accessible

Refresh Close

To edit a reservation, select Reserve from the pop-up menu that displays.



The Reserve form displays.

Reserve

Reservations-Assign Slot New + Add Row

Reservation Date Between \* 04/01/2015 to 04/30/2015

Search

Click on the Search button.


Reserve

Reservations-Assign Slot New + Add Row


Reservation Date Between \* 04/01/2015 to 04/30/2015



Total Rows: 3 Search

	Client *	Slot	Start Date *	End Date *	Check Client In?
<input checked="" type="checkbox"/>	Rodriguez, Anita	Slot	11/1/2014	Present	
<input checked="" type="checkbox"/>	Rodriguez, Jack	Slot	11/7/2013	Present	
<input checked="" type="checkbox"/>	Rodriguez, Roberto	Slot	11/7/2013	Present	




Select the desired row to edit and click on the blue checkbox  associated with it. The row expands.

Reserve ✕

Reservations-Assign Slot New + Add Row 

Reservation Date Between   to  

Total Rows: 3 🔍 Search

	Client *	Slot	Start Date *	End Date *	☑ Check Client In?	
	<input type="text" value="Rodriguez, Anita"/> <span>🔍</span>	<input type="text" value="Slot"/> <span>🔍</span>	<input type="text" value="11/01/2014"/> 	<input type="text" value="Present"/> 	<input type="checkbox"/>	<span>✕</span>
<div><span>Edit Reservation w Check-In</span></div> <div><span>Client Lease</span> <input type="text"/> <span>🔍</span> <span>Delete</span></div>						

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.

Reserve ✕

Edit Reservation with Check-in 

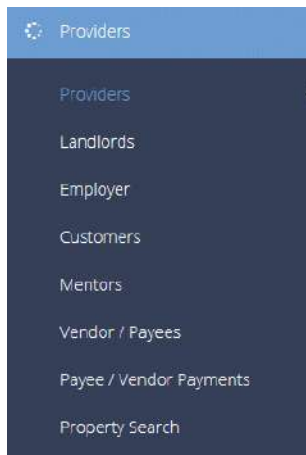
Client


Start Date  

End Date  

## Emergency Housing Check-In

**Objective:** Check-in a client to an emergency housing reservation through the graphical user interface.

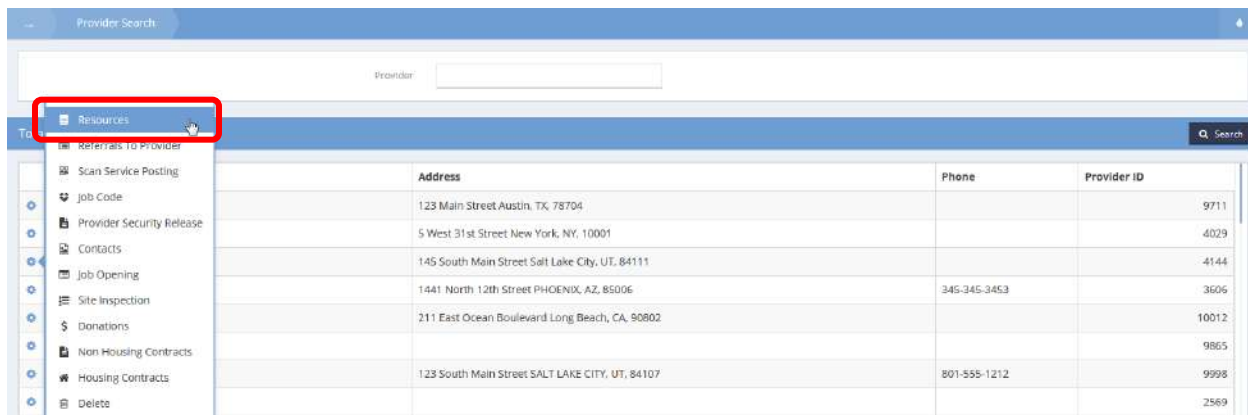


The Provider Search form displays. Locate the desired provider and click on the action gear  icon associated with it.

A screenshot of the 'Provider Search' form. At the top is a search bar with the placeholder text 'Provider'. Below the search bar, a blue header bar indicates 'Total Rows: 125' and includes a 'Search' button. The main content is a table with four columns: Provider, Address, Phone, and Provider ID. The table lists various providers such as Adrian's Bistro, Apple Computers - Real, Auto Zone, Banner Health, Belmont High School, Blue Cross Blue Shield, Brown Securities, Caitlin's Cupboard, Camille's Congregate Dining, and Camrone Funding, each with their respective addresses, phone numbers, and provider IDs.

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.




Provider Search

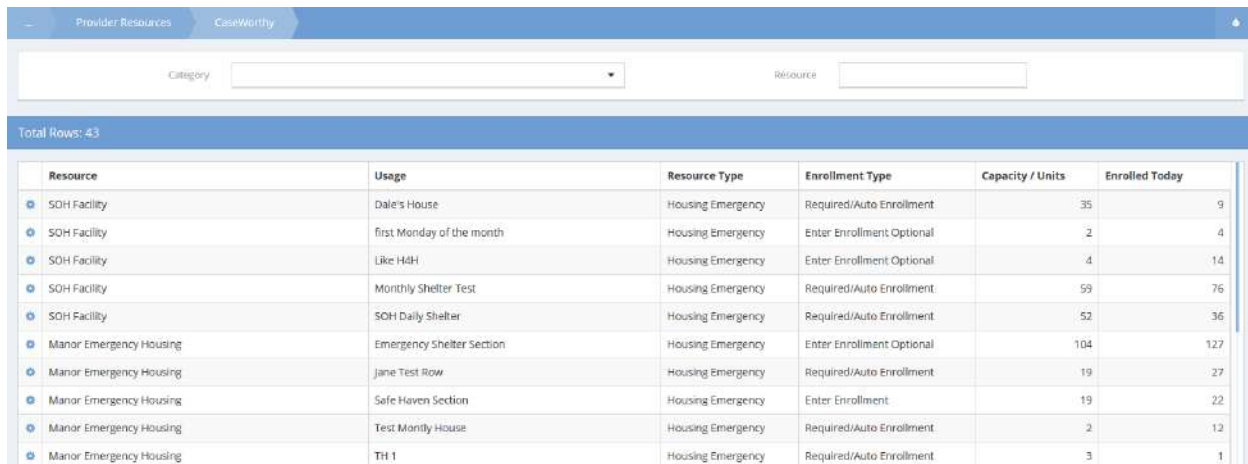
Provider:

**Resources**

- Referals to Provider
- Scan Service Posting
- Job Code
- Provider Security Release
- Contacts
- Job Opening
- Site Inspection
- Donations
- Non Housing Contracts
- Housing Contracts
- Delete

Address	Phone	Provider ID
123 Main Street Austin, TX, 78704		9711
5 West 31st Street New York, NY, 10001		4029
145 South Main Street Salt Lake City, UT, 84111		4144
1441 North 12th Street PHOENIX, AZ, 85006	345-345-3453	3606
211 East Ocean Boulevard Long Beach, CA, 90802		10012
		9865
123 South Main Street SALT LAKE CITY, UT, 84107	801-555-1212	9998
		2589

The Provider Resources form displays. Locate the desired resource and click on the action gear  icon associated with it.



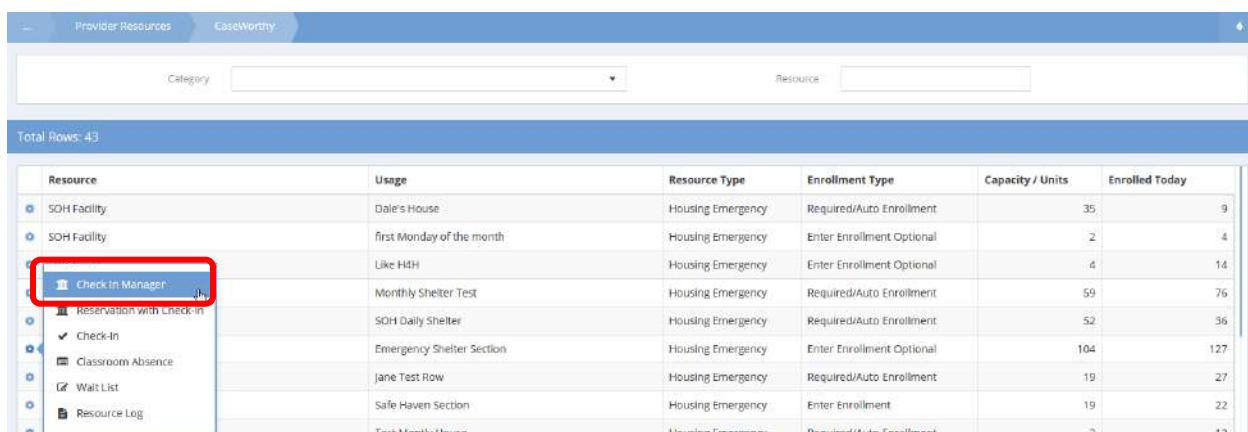
Provider Resources CaseWorthy

Category:  Resource:

Total Rows: 43

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
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
Manor Emergency Housing	Test Monthly House	Housing Emergency	Required/Auto Enrollment	2	12
Manor Emergency Housing	TH 1	Housing Emergency	Required/Auto Enrollment	3	1

Select Check-In Manager from the pop up menu that appears.



Provider Resources CaseWorthy

Category:  Resource:

Total Rows: 43

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
	Like H4H	Housing Emergency	Enter Enrollment Optional	4	14
	Monthly Shelter Test	Housing Emergency	Required/Auto Enrollment	59	76
	SOH Daily Shelter	Housing Emergency	Required/Auto Enrollment	52	36
	Emergency Shelter Section	Housing Emergency	Enter Enrollment Optional	104	127
	Jane Test Row	Housing Emergency	Required/Auto Enrollment	19	27
	Safe Haven Section	Housing Emergency	Enter Enrollment	19	22
	Test Monthly House	Housing Emergency	Required/Auto Enrollment	2	12

Check-In Manager

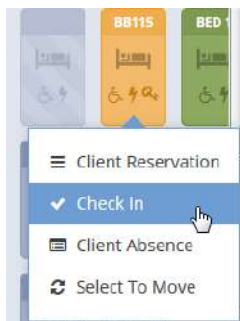
- Reservation with Check-In
- Check-In
- Classroom Absence
- Wait List
- Resource Log




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  Save button.

Check In ✕


Edit Resource Usage ⚙


Event ★	Date	Time
	04/06/2015-Monday	All day

Event Summary

Client

Slot


End Reservation 










Date ★  


## Emergency Housing Usage

**Objective:** Maintain, utilize and research resource usages from this list.

Provider Search			
Provider: <input type="text"/>			
Total Rows: 125			
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
Caillins Cupboard			2569

Locate the desired provider and click on the action gear  associated with it. Select Resources from the pop-up menu that appears.

Provider Search			
Provider: <input type="text"/>			
Total Rows: 125			
Provider	Address	Phone	Provider ID
 Resources	123 Main Street Austin, TX, 78704		9711
 Resources to Provider	5 West 31st Street New York, NY, 10001		4029
 Scan Service Posting	145 South Main Street Salt Lake City, UT, 84111		4144
 Job Code	1441 North 12th Street PHOENIX, AZ, 85006	345-345-3453	3606
 Provider Security Release	211 East Ocean Boulevard Long Beach, CA, 90802		10012
 Contacts			9865
 Job Opening	123 South Main Street SALT LAKE CITY, UT, 84107	801-555-1212	9998
 Site Inspection			2569
 Donations			

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.


Provider Resources CaseWorthy

Category  Resource

Total Rows: 43

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 Monthly 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
	Permanent Supportive Housing	Housing		16	11
	Manor Apartments - 1st Floor (Sales Training)	Housing		20	4
	Single Room Occupancy	Housing		28	12
	SOH - Perm, Supportive Housing	Housing		13	6

Check in Manager  
Roster/Checkin  
Classroom Absence  
Wait List  
Housing

The Emergency Housing Usage form displays. Locate the desired Usage and click on the action gear  associated with it.

Emergency Housing Usage

Total Rows: 16

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.

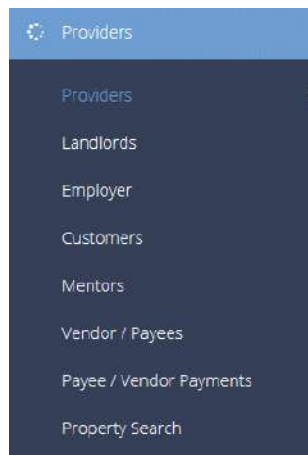


Emergency Housing Usage

Total Rows: 16


	Usage	Usage Label	Resource Type	Enrollment Type	Capacity / Units	Enrolled Today
Reservation/Slot Assignment w Check-in	Overflow (Room 210)	Rm 210	Housing	Required/Auto Enrollment	5	
✓ Check-in	Two Bedroom 1	Rm 201	Housing	Required/Auto Enrollment	5	1
Roster/Checkin	Two Bedroom	Rm 203	Housing	Enter Enrollment Optional	4	
Wait List	One Bedroom Rm 200	Rm 200	Housing	Required/Auto Enrollment	2	3
Resource Log	One Bedroom Rm 202	Rm 202	Housing	Required/Auto Enrollment	1	1
Housing Check-in	One Bedroom Rm 204	Rm 204	Housing	Required/Auto Enrollment	2	1
Availability Report	Three Bedroom	Rm 205	Housing	Required/Auto Enrollment	2	2
Check-in Roster Report	Three Bedroom	Rm 207	Housing	Enter Enrollment	2	
Housing Exception						

## 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 Search			
<div> <div>Provider</div> <input type="text"/> </div>			
Total Rows: 123			
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.


Blue Cross Blue Shield				9865
Brown Securities	123 South Main Street SALT LAKE CITY, UT, 84107	801-555-1212		9998
Resources				2569
Referrals To Provider				2564
Scan Service Posting	1258 Highway 7 Schenectady, NY, 12306			4096
Job Code	1234 RALEIGH, NC, 27605			4443
Provider Security Release	1400 West North Temple Salt Lake City, UT, 84116			4122
Contacts	740 East 3900 South Salt Lake City, UT, 84107	801-888-9999		14
Job Opening				8472
Site Inspection				8473
Donations				8431
Non Housing Contracts	2401 Lake Park Drive Smyrna, GA, 30089			5556
Housing Contracts	1501 North Classen Boulevard Oklahoma City, OK, 73106	405-523-3000		129
Delete				2563
Cathy's Congregate Dining				10093
CCA	321 Home Place East Austin, TX, 78753			

Select a date range and click on the  button. To add a new job, click on the  button.

The Create Job Order Workflow displays


All Job Openings
CaseWorthy


Date (Open) 07/01/2013 to 03/16/2015
Benefits Type
Status Open





Description	Employer	Begin - End Date	Begin - End Salary	Benefits Type
General Labor	CaseWorthy	7/26/2013 - 8/31/2013		Without Benefits
Construction Laborer	CaseWorthy	8/7/2013 - 8/16/2013		Without Benefits
	CaseWorthy	8/12/2013 - 8/31/2013		
Asst. Store Manager	CaseWorthy	5/29/2014 - 7/31/2014		With Benefits
	CaseWorthy	5/30/2014 - 5/31/2014		
Flunky	CaseWorthy	7/3/2014 - 7/31/2014		
Support Specialist	CaseWorthy	11/24/2014 - 12/31/2014		


## Employer Lookup

Select an employer with the magnifying glass  icon.

Job Opening (Add) (2)

Job Opening Information

Employer \*  Contact Person 

Order Date \* 04/06/2015 

Status \* Open


# Of Open Positions:

Job Title \*


Posting URL:


Employer Website:

Job Description \*





Words: 0

Will Interview: Yes 

Need Drug Screen 

Posting Date Range

Begin Date \* 04/06/2015 

End Date \*  



The Employer Lookup form displays.

Select Provider/Employer Lookup

Select Provider/Employer


Provider Name

City

Total Rows: 40

Provider Name	City	State	Zip	Is Contact
Adnan's Bistro	Austin	TX	78704	No
Apple Computers - Real	New York	NY	10001	No
Auto Zone	Salt Lake City	UT	84111	No
Belmont High School	Long Beach	CA	90802	No
Burger King	Salt Lake City	UT	84107	No
Cardinal Solutions Group	RALEIGH	NC	27605	No
Carl's Junior	Salt Lake City	UT	84116	No
CaseWorthy	Salt Lake City	UT	84107	No

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.

Create Job Order Workflow

Job Opening (Add) (2)

Job Opening Information

Employer

Contact Person

Order Date  03/16/2015

Status  Open

# of Open Positions

Job Title

Posting URL

Employer Website

Job Description

Will Interview  Yes


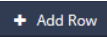
Need Drug Screen


Posting Date Range


Begin Date  03/16/2015




End Date

Save Cancel


Enter any skill and credential types using the magnifying glass  icon. Click  Add Row to add additional slots for credentials.

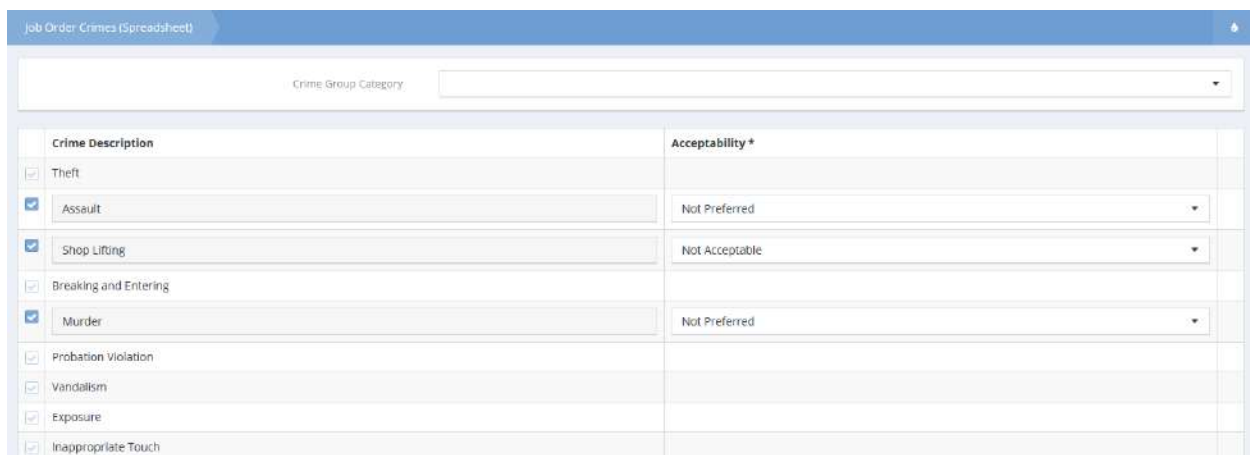
Click  Save to proceed to the next step.

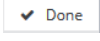


Click  Add Row to add a keyword and use the magnifying glass lookup  to lookup any keywords desired to be associated with the job. Click  Save to proceed to the next step.




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  to return to the Job Openings form.

Workflow is now complete.

Status	Step Name	Completed By	Completed Date
✓	Job Opening (Add) (2)	Elison, Adrian	3/16/2015
✓	Job Order Skills and Credentials (Edit)	Elison, Adrian	3/16/2015
✓	Job Order Keywords Spreadsheet	Elison, Adrian	3/16/2015
✓	Job Order Crimes (Spreadsheet)	Elison, Adrian	3/16/2015







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.

← All Job Openings CaseWorthy Add New Workflow

Date (Open) 07/01/2013 to 03/16/2015 Benefits Type

Status Open

Search

Description	Employer	Begin - End Date	Begin - End Salary	Benefits Type
 Edit	CaseWorthy	7/26/2013 - 8/31/2013		Without Benefits
 Skills & Credentials	CaseWorthy	8/7/2013 - 8/16/2013		Without Benefits
 Crimes	CaseWorthy	8/12/2013 - 8/31/2013		
 Key Words	CaseWorthy	5/29/2014 - 7/31/2014		With Benefits
 Client Matches	CaseWorthy	5/30/2014 - 5/31/2014		
 Delete	CaseWorthy	7/3/2014 - 7/31/2014		
	CaseWorthy	11/24/2014 - 12/31/2014		

## 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.

Landlord Search

Provider:  City:

Total Rows: 4 [Q Search](#)

Provider	Address	City	Phone	View Properties
CaseWorthy	740 East 3900 South,	Salt Lake City	801-888-9999	<a href="#">View Properties</a>
Landlord A	125 South,	SAINT LOUIS		<a href="#">View Properties</a>
Larr H miller	77 West 1300 South,	Salt Lake City		<a href="#">View Properties</a>
TEST TEST				<a href="#">View Properties</a>

To view ratings on a property, click the [Question Rating](#) button for ratings based on questions and click [Client Ratings](#) for overall ratings.

Landlord summary

Total Rows: 3

Property Address 1 & 2	City, State & Zip Code	Totals Scores / Surveys	Avg Score Per Survey	Question Rating	Client Ratings
740 East 3900 South, Apt. 1	Salt Lake City, UT 84107	4 / 2	2	<a href="#">Question Rating</a>	<a href="#">Client Ratings</a>
740 East 3900 South, Apt. 2	Salt Lake City, UT 84107	19 / 8	2.375	<a href="#">Question Rating</a>	<a href="#">Client Ratings</a>
740 East 3900 South, Apt #103	Salt Lake City, UT 84107	2 / 1	2	<a href="#">Question Rating</a>	<a href="#">Client Ratings</a>

Each rating summary can be filtered by selecting a follow up type from the drop-down list and clicking the [Q Search](#) button.

Rate By Domain Summary

FollowUp Type:

Total Rows: 2 [Q Search](#)

Property Address	Question	Survey Total	# of Surveys
740 East 3900 South, Apt. 1	How do you like the Area?	2	1
740 East 3900 South, Apt. 1	How is the Heater?	2	1

Rate By Client Summary

FollowUp Type:

Total Rows: 1 [Q Search](#)

Property Address	Client Name	Rating Value	Rating Count
740 East 3900 South, Apt. 1	Baer, Doug	4	2

## Employers

### Entity Demographics

**Objective:** View and edit hiree demographic information for employers.


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

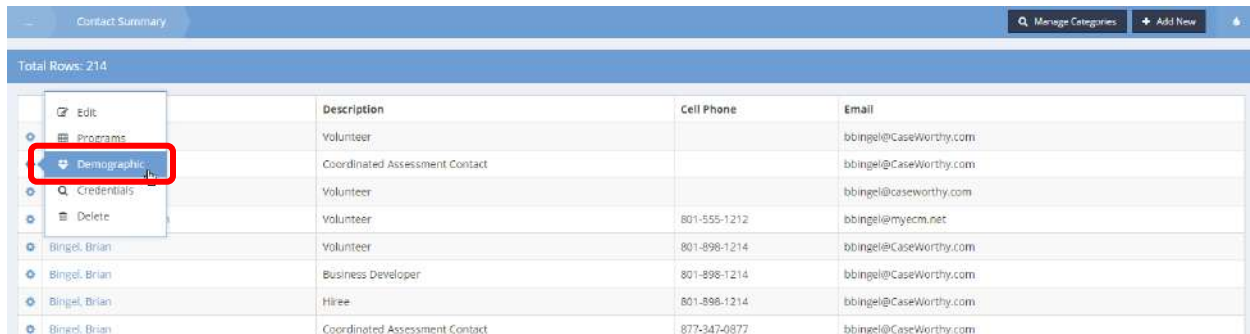
On the Employer summary form, click the action gear  associated with the desired employer and select Contacts from the pop up menu that appears.

Employer			
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	185	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

The Contact Summary form displays.

Contact Summary			
Total Rows: 229		Manage Categories	Add New
Name	Description	Cell Phone	Email
Austin, Steve	Volunteer		
Austin, Steve	Volunteer		
Austin, Steve	Volunteer		
Austin, Steve	Volunteer		
Barry, Davis	Volunteer		bblingel@CaseWorthy.com
Barry, Davis	Coordinated Assessment Contact		bblingel@CaseWorthy.com
Bingel - Vol 924, Brian	Volunteer		bblingel@caseworthy.com
Bingel (Volunteer) Brian	Volunteer	801-555-1212	bblingel@myecm.net

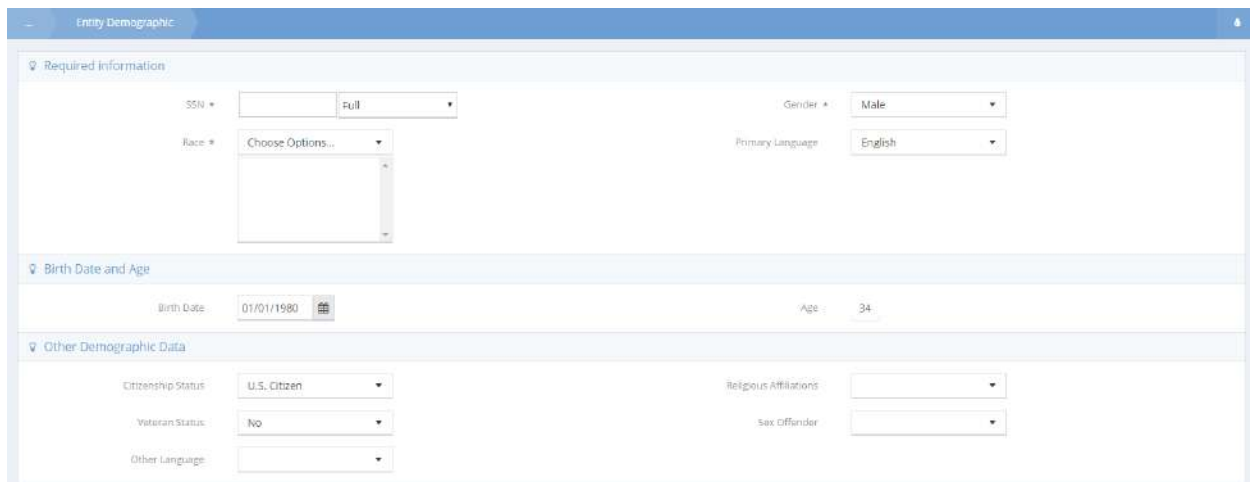
Click the action gear  icon associated with the desired contact and select Demographic from the pop up menu that appears.




The screenshot shows a table titled 'Contact Summary' with a header bar containing 'Manage Categories' and 'Add New' buttons. Below the header, it states 'Total Rows: 214'. The table has columns for 'Edit', 'Programs', 'Description', 'Cell Phone', and 'Email'. A context menu is open over the first row, with 'Demographic' highlighted by a red rectangle. The table contains several rows of contact information for 'Bingel, Brian'.

Edit	Programs	Description	Cell Phone	Email
		Volunteer		bbingel@CaseWorthy.com
		Coordinated Assessment Contact		bbingel@CaseWorthy.com
		Volunteer		bbingel@caseworthy.com
		Volunteer	801-555-1212	bbingel@myecm.net
		Volunteer	801-898-1214	bbingel@CaseWorthy.com
		Business Developer	801-898-1214	bbingel@CaseWorthy.com
		Hiree	801-898-1214	bbingel@CaseWorthy.com
		Coordinated Assessment Contact	877-347-0877	bbingel@CaseWorthy.com

The Entity Demographic form displays.




The screenshot shows the 'Entity Demographic' form. It has a header bar with 'Entity Demographic' and a 'Save' button. The form is divided into three sections: 'Required Information', 'Birth Date and Age', and 'Other Demographic Data'. The 'Required Information' section includes fields for SSN (with a dropdown set to 'Full'), Race (with a dropdown set to 'Choose Options...'), Gender (with a dropdown set to 'Male'), and Primary Language (with a dropdown set to 'English'). The 'Birth Date and Age' section includes a 'Birth Date' field (set to '01/01/1980') and an 'Age' field (set to '34'). The 'Other Demographic Data' section includes fields for Citizenship Status (set to 'U.S. Citizen'), Veteran Status (set to 'No'), Other Language (with a dropdown), Religious Affiliations (with a dropdown), and Sex Offender (with a dropdown).

Enter all required info and click on the  Save 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
Job Opening	1400 West North Temple, Salt Lake City, UT 84116	4	4122
Contacts	740 East 3900 South, Salt Lake City, UT 84107	195	14
<b>+ Hirees</b>	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	<b>+ Add New</b>
Total Rows: 2			
Name	Description	Cell Phone	Email
Bingel, Brian	Hiree	801-898-1214	bbingel@CaseWorthy.com
Jane, Janet	Hiree		jjjoe@CaseWorthy.com


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

The Add Contact form displays.

The screenshot shows the 'Add Contact' form with the following fields and sections:

- Personal Information:**
  - User: [Text Field]
  - First Name: [Text Field]
  - Last Name: [Text Field]
  - Category: [Dropdown Menu: Choose Options...]
  - Begin Date: [Date Picker: 01/05/2015]
  - End Date: [Date Picker: Present]
- Address Information:**
  - Copy Provider Address: [Text Field]
  - Address1: [Text Field]
  - Address2: [Text Field]
  - ZipCode: [Text Field]
  - City: [Text Field]
  - State: [Text Field]
  - [Verify Address Button]
- Contact Information:**
  - Phone1 Type: [Dropdown Menu: Cell]
  - Phone1: [Text Field]
  - Phone2 Type: [Dropdown Menu: Office]
  - Phone2: [Text Field]

At the bottom right, there are **Save** and **Cancel** buttons.

Enter all required fields and click on the  **Save** button.

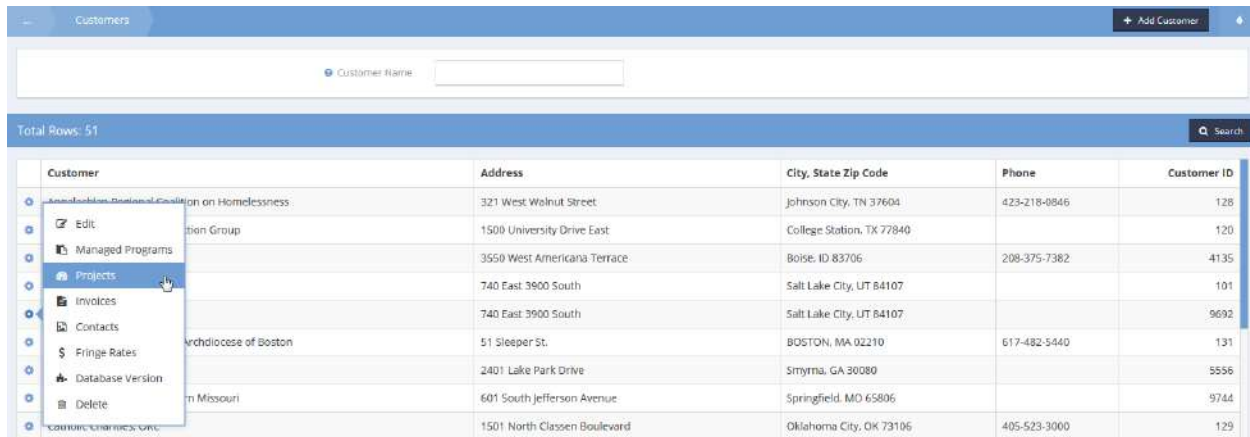


## Customers


### *Generate Housing Invoice*

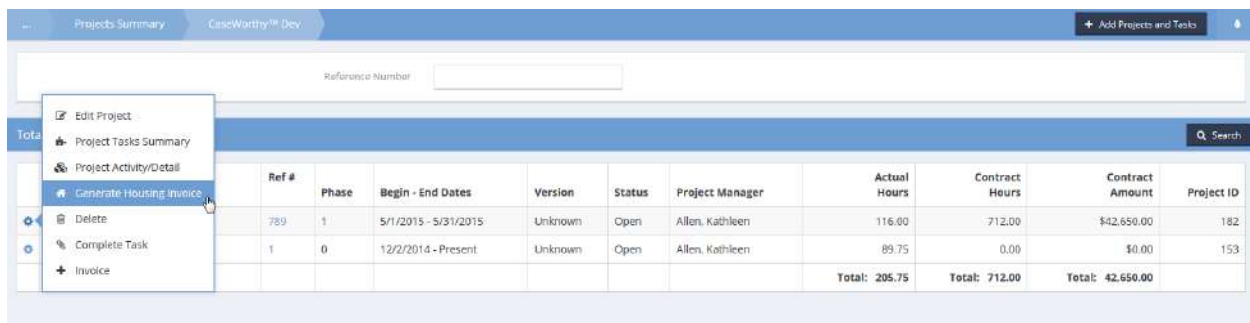
**Objective:** Generate a provider housing invoice.

**Navigation:** Organization>Providers>Customers




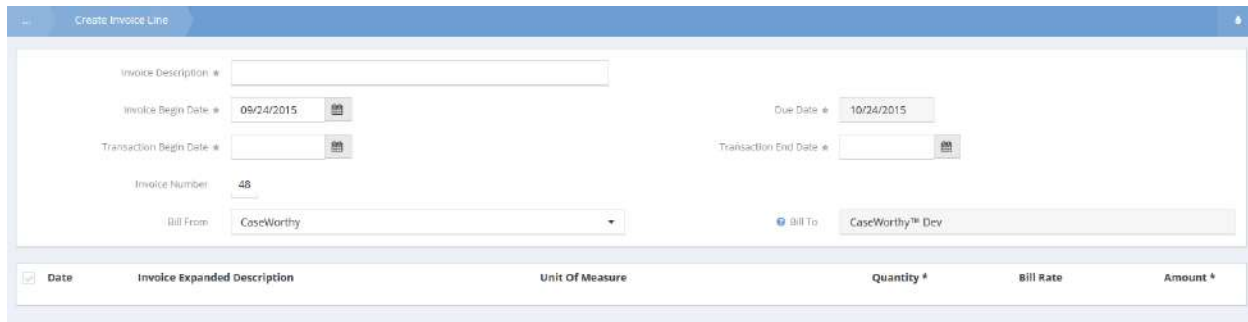
Customer	Address	City, State Zip Code	Phone	Customer ID
Association of Homeless	321 West Walnut Street	Johnson City, TN 37604	423-218-0846	128
ation Group	1500 University Drive East	College Station, TX 77840		120
Managed Programs	3550 West Americana Terrace	Boise, ID 83706	208-375-7382	4135
	740 East 3900 South	Salt Lake City, UT 84107		101
	740 East 3900 South	Salt Lake City, UT 84107		9692
Archdiocese of Boston	51 Sleeper St.	BOSTON, MA 02210	617-482-5440	131
	2401 Lake Park Drive	Smyrna, GA 30080		5556
in Missouri	601 South Jefferson Avenue	Springfield, MO 65806		9744
	1501 North Classen Boulevard	Oklahoma City, OK 73106	405-523-3000	129



Click the action gear  associated with the desired customer and select Projects from the pop up menu that appears. The Projects Summary form displays.



Ref #	Phase	Begin - End Dates	Version	Status	Project Manager	Actual Hours	Contract Hours	Contract Amount	Project ID
789	1	5/1/2015 - 5/31/2015	Unknown	Open	Allen, Kathleen	116.00	712.00	\$42,650.00	182
1	0	12/2/2014 - Present	Unknown	Open	Allen, Kathleen	89.75	0.00	\$0.00	153
Total:						205.75	712.00	42,650.00	

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.

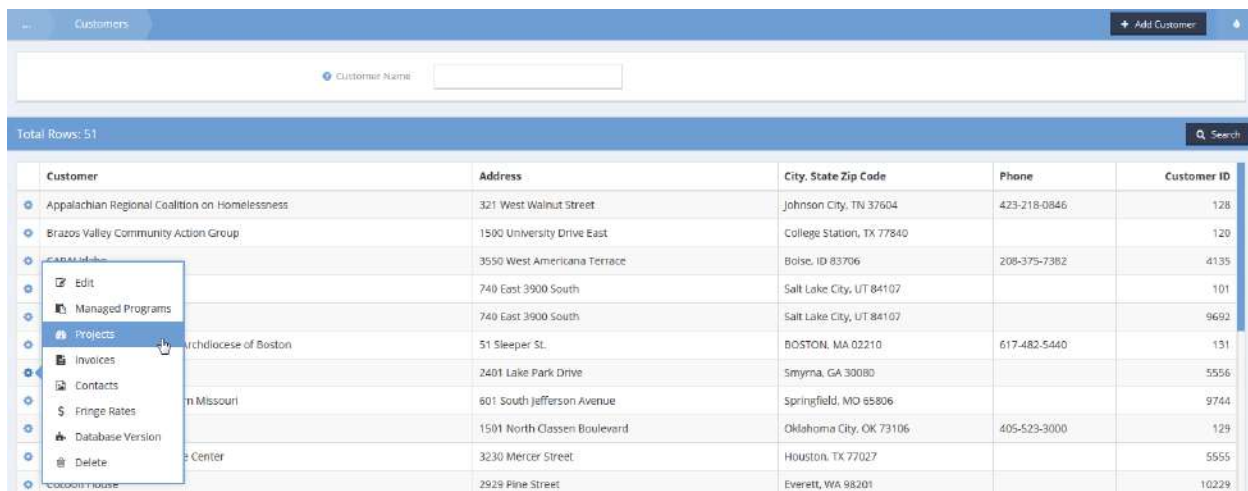


Enter a description and date range. Click the clear checkbox  icon for an item, enter a quantity and amount. Click  when finished.


## Assign Project Tasks

**Objective:** Create and assign task assignments for a customer project.

**Navigation:** Organization>Providers>Customers



Customer	Address	City, State Zip Code	Phone	Customer ID
Appalachian Regional Coalition on Homelessness	321 West Walnut Street	Johnson City, TN 37604	423-218-0846	128
Brazos Valley Community Action Group	1500 University Drive East	College Station, TX 77840		120
Carroll County	3550 West Americana Terrace	Boise, ID 83706	208-375-7382	4135
Churchdiocese of Boston	740 East 3900 South	Salt Lake City, UT 84107		101
	740 East 3900 South	Salt Lake City, UT 84107		9692
	51 Sleeper St.	BOSTON, MA 02210	617-482-5440	131
	2401 Lake Park Drive	Smyrna, GA 30080		5556
	601 South Jefferson Avenue	Springfield, MO 65806		9744
	1501 North Classen Boulevard	Oklahoma City, OK 73106	405-523-3000	129
	3230 Mercer Street	HOUSTON, TX 77027		5555
	2929 Pine Street	Everett, WA 98201		10229

Click the action gear  on the desired customer and click Projects.



Enter Project Task Assignment

**Action Assignment**

Begin Date: 09/24/2015

Target Date: \*

Team: [Search]

Assign To: [Search]

Note: [Text Area]


**Action Status and Completion**

Action Taken By: [Search]

Status: Open

Action Type: Other

Save Cancel

Enter a target date, note, and assign to a team and member if desired. Click  Save when finished.

## Generate Invoice From Customer New

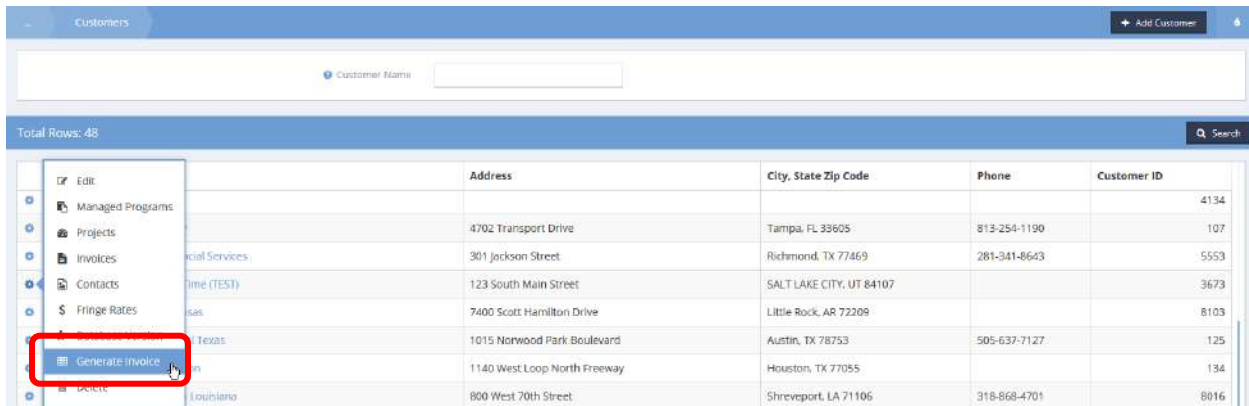
**Objective:** Select an invoice to be generated from a list based upon the customer.



Customers					+ Add Customer	
Customer Name						
Total Rows: 48					Search	
Customer	Address	City, State Zip Code	Phone	Customer ID		
Appalachian Regional Coalition on Homelessness	321 West Walnut Street	Johnson City, TN 37604	423-218-0846	128		
Brazos Valley Community Action Group	1500 University Drive East	College Station, TX 77840		120		
CAPAI Idaho	3550 West Americana Terrace	Boise, ID 83706	208-375-7382	4135		
CaseWorthy (Real)	740 E 3900 South	SALT LAKE CITY, UT 84107		101		
CaseWorthy™ Dev	740 East 3900 South	Salt Lake City, UT 84107		9692		
Catholic Charitable Bureau Archdiocese of Boston	51 Sleeper St.	BOSTON, MA 02210	617-482-5440	131		
Catholic Charities Atlanta	2401 Lake Park Drive	Smyrna, GA 30080		5556		
Catholic Charities of Southern Missouri	601 South Jefferson Avenue	Springfield, MO 65806		9744		
Catholic Charities, OKC	1501 North Classen Boulevard	Oklahoma City, OK 73106	405-523-3000	129		
Christian Community Service Center	3230 Mercer Street	Houston, TX 77027		5555		


Locate the desired customer and click on the action gear  associated with it.

Select Generate Invoice from the pop-up menu that appears.



The screenshot shows the 'Customers' page with a table of customer records. A context menu is open over the first row, and the 'Generate Invoice' option is highlighted with a red rectangle.

	Customer Name	Address	City, State Zip Code	Phone	Customer ID
					4134
		4702 Transport Drive	Tampa, FL 33605	813-254-1190	107
		301 Jackson Street	Richmond, TX 77469	281-341-8643	5553
		123 South Main Street	SALT LAKE CITY, UT 84107		3673
		7400 Scott Hamilton Drive	Little Rock, AR 72209		8103
		1015 Norwood Park Boulevard	Austin, TX 78753	505-637-7127	125
		1140 West Loop North Freeway	Houston, TX 77055		134
		800 West 70th Street	Shreveport, LA 71106	318-868-4701	8016

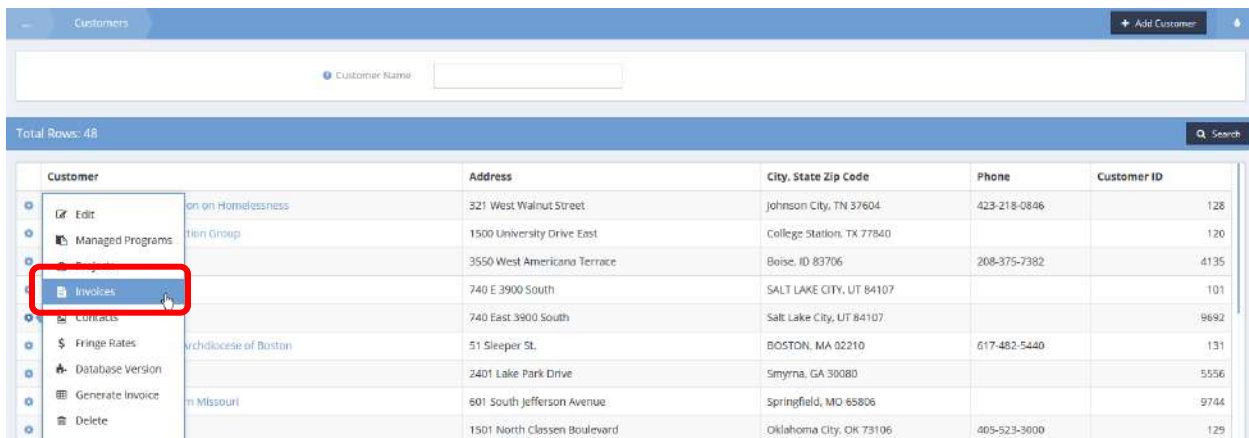
The Create Invoice Line form displays. Enter a description, make any other changes and click  when finished.



The 'Create Invoice Line' form is shown with the following fields:

- Invoice Description:
- Invoice Date:
- Due Date:
- Invoice Number:
- Bill From:
- Bill To:

To view invoices, click the action gear  and click Invoices.



The screenshot shows the 'Customers' page with a table of customer records. A context menu is open over the first row, and the 'Invoices' option is highlighted with a red rectangle.

	Customer	Address	City, State Zip Code	Phone	Customer ID
	on on Homedressness	321 West Walnut Street	Johnson City, TN 37604	423-218-0846	128
	tion Group	1500 University Drive East	College Station, TX 77840		120
		3550 West Americana Terrace	Boise, ID 83706	208-375-7382	4135
		740 E 3900 South	SALT LAKE CITY, UT 84107		101
		740 East 3900 South	Salt Lake City, UT 84107		9692
	rchdiocese of Boston	51 Sleeper St.	BOSTON, MA 02210	617-482-5440	131
		2401 Lake Park Drive	Smyrna, GA 30080		5556
	n Missouri	601 South Jefferson Avenue	Springfield, MO 65806		9744
		1501 North Classen Boulevard	Oklahoma City, OK 73106	405-523-3000	129

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
6/3/2014	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.

Customers

+ Add Customer


Customer Name:  State:

Map

Total Rows: 70

Search

Customer	Address	City, State Zip Code	Phone	Customer ID	State	Latitude
TN						
Appalachian Regional Coalition on Homelessness	321 West Walnut Street	Johnson City, TN 37604	423-218-0846	128	TN	36.31
St. Patrick Center	800 N Tucker	Lexington, TN 38351		105	TN	35.65
Tennessee Homeless Solutions	465 West Main Street	Lexington, TN 38351		112	TN	35.65
Tennessee Valley Coalition	PO Box 1015	Jacksboro, TN 37757		109	TN	36.33
asdf				20020		0
asdfasdf				20024		0

Click the action gear  icon associated with the desired customer and select Projects from the menu items. The Projects Summary form displays.

Projects Summary

St. Patrick Center


+ Add Projects and Tasks

Project #  Description  Status ☐ Open ☐ Closed ☐ Requested

Total Rows: 1

Search

Description	Project Ref #	Phase	Begin - End Dates	Version	Project Mgr	Actual Hrs	Contract Hrs	Status	Contract Amount	Project ID
Monthly Support	Support	0	12/1/2012 - 12/31/2013	Unknown	Wilson, Nina	1,689.50	618,269.60	Open	\$77,283,950.00	13
						Total: 1,689.50	Total: 618,269.60		Total: 77,283,950.00	


Click the action gear  icon associated with the desired project and select View Files from the menu options.





The View Files form displays.





The screenshot shows a web interface titled "View Files". It contains a table with the following data:

	File Label
	d49660ea-34e3-4251-bd59-c7b1e4491945 (3).pdf
	BCB Denver Driver License.pdf

Any files that have been uploaded for that project display here. Use the action gear  icon to view the attached file. Click the  button when finished.

## Mentors


Mentors may be filtered by entering a name and clicking the  **Search** button.



Mentor Name:

Total Rows: 1

Mentor Name	Address	City, State, Zip Code	Phone	Category
CaseWorthy	740 East 3900 South	Salt Lake City, UT 84107	801-888-9999	Mentor



To view or edit contacts, click the action gear  and click Contacts. The Provider Contacts Summary form displays.



Mentor Name:

Total Rows: 1

Mentor Name	Address	City, State, Zip Code	Phone	Category
CaseWorthy	740 East 3900 South	Salt Lake City, UT 84107	801-888-9999	Mentor


To add a new contact, click the  **Add New** button. To edit a contact, click the action gear  and click Edit.

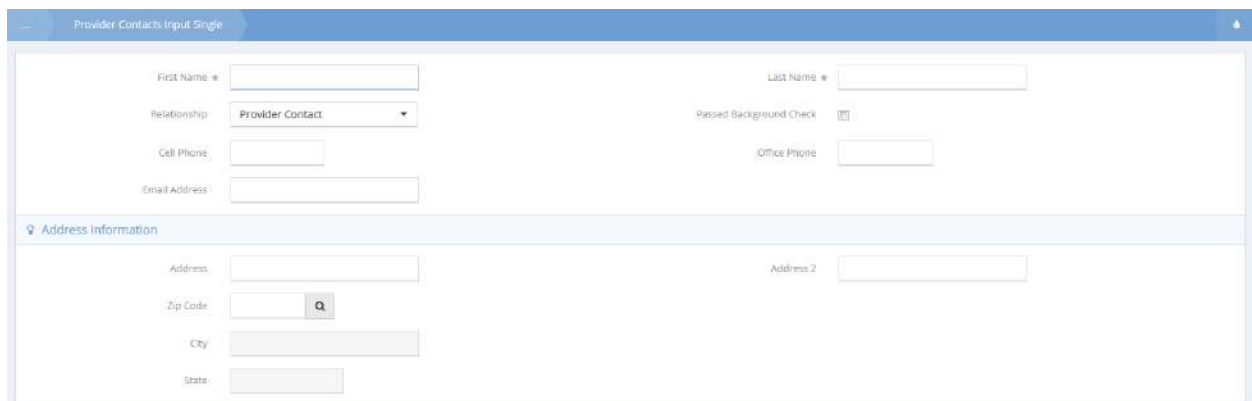


Provider Contacts Summary CaseWorthy

Total Rows: 2

Last Name, First Name	Relationship	Cell Phone	Office Phone	Passed Background Check
 Edit				No
 Delete	Provider Contact			No

Enter a first and last name and any other desired info. Click  **Save** when finished.



Provider Contacts Input Single

First Name:  Last Name:

Relationship:

Cell Phone:  Office Phone:

Email Address:

Passed Background Check: ☐


Address Information


Address:  Address 2:

Zip Code:  


City:

State:

To view or edit service activities, click the action gear  and click Service Activities.




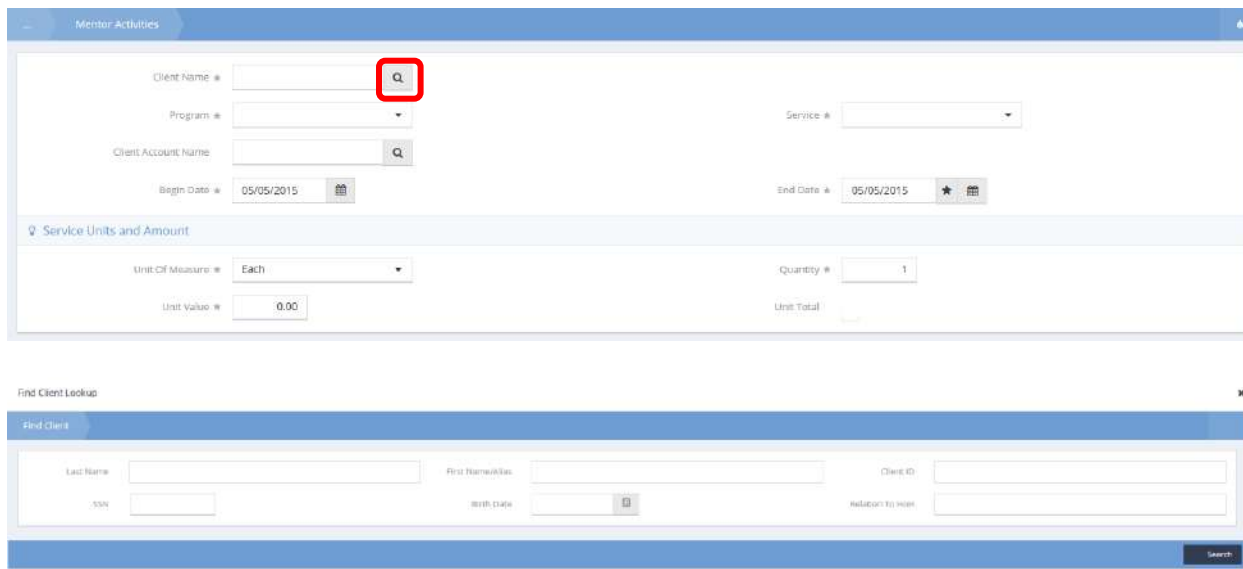
The screenshot shows the 'Mentors' page with a search bar for 'Mentor Name'. Below the search bar, a table lists mentors. The first row is highlighted. To the left of the table, an action menu is open, showing options: 'Contacts', 'Service Activities' (highlighted with a red box), 'Teams', and 'Assigned Clients'. The table has columns: 'Address', 'City, State, Zip Code', 'Phone', and 'Category'. The first row contains: '740 East 3900 South', 'Salt Lake City, UT, UT 84107', '801-888-9999', and 'Mentor'.

To add a new service, click the **+ Add New** button. To edit a contact, click the action gear  and click Edit Service.




The screenshot shows the 'Mentor Activities Summary' page with a '+ Add New' button highlighted with a red box. Below the button, a table lists activities. The first row is highlighted. To the left of the table, an action menu is open, showing options: 'Edit Service' (highlighted with a red box) and 'Delete'. The table has columns: 'Date', 'Client Served', 'Program', 'Service', and 'Total'. The first row contains: '4/30/2015', 'LDRNLDNSNF, LDRNLDNSLF', 'Common Intake', 'Carpet', and '\$ 1.00'. The second row contains: '4/30/2015', 'LDRNLDNSNF, LDRNLDNSLF', 'Medical Program', 'Drug Testing', and '\$ 100.00'. The third row contains: '4/30/2015', 'LDRNLDNSNF, LDRNLDNSLF', 'Sample prog (HIV)', 'Adult Counseling Service', and '\$ 10.00'. The fourth row contains: '4/30/2015', 'LDRNLDNSNF, LDRNLDNSLF', 'Sample prog (HIV)', 'Adult Counseling Service', and '\$ 10.00'.

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.




The screenshot shows the 'Mentor Activities' form. The 'Client Name' field has a magnifying glass icon highlighted with a red box. Below the form, a 'Find Client Lookup' dialog box is open. The dialog box has fields for 'Last Name', 'First Name/Initials', 'Client ID', 'SSN', 'Birth Date', and 'Relation to Mentor'. A 'Search' button is at the bottom right.

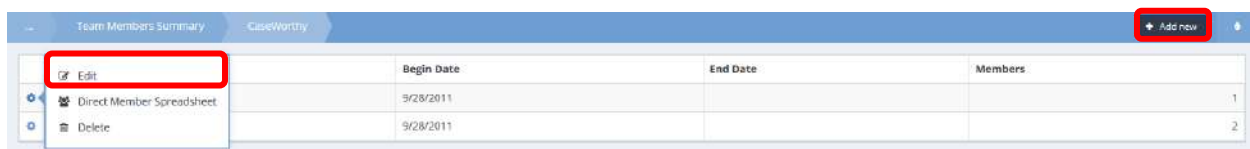
To view or edit teams, click the action gear  and click Teams.



The screenshot shows the 'Mentors' page with a search bar for 'Mentor Name'. Below the search bar, a table lists mentors. The 'Total Rows: 1' is indicated. An action gear icon is visible next to the first row. A dropdown menu is open, showing options: 'Contacts', 'Service Activities', 'Teams' (highlighted with a red box), and 'Assigned Clients'.

Address	City, State, Zip Code	Phone	Category
740 East 3900 South	Salt Lake City, UT, 84107	801-888-9999	Mentor

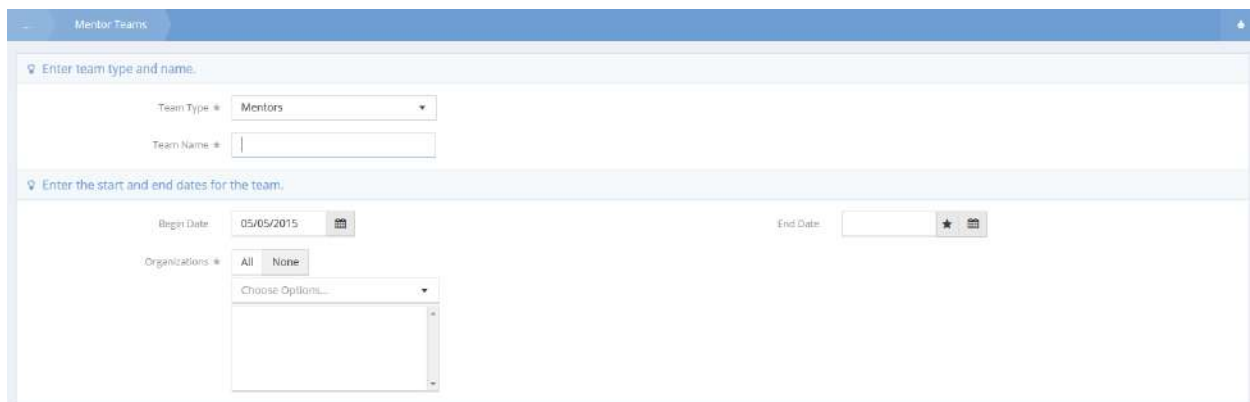
Click the **+ Add New** button to create a new team or click the action gear  and click Edit to edit an existing team.




The screenshot shows the 'Team Members Summary' page for 'CaseWorthy'. There is an '+ Add new' button in the top right. A table lists team members with columns: 'Begin Date', 'End Date', and 'Members'. The first row shows '9/28/2011' for both dates and '1' member. The second row shows '9/28/2011' for both dates and '2' members. An action gear icon is visible next to the first row. A dropdown menu is open, showing options: 'Edit' (highlighted with a red box), 'Direct Member Spreadsheet', and 'Delete'.

Begin Date	End Date	Members
9/28/2011		1
9/28/2011		2

Enter a team name and select the organizations to associate it with. Click the **Save** button when finished.




The screenshot shows the 'Mentor Teams' page. It has a form to create a new team. The 'Team Type' is set to 'Mentors'. The 'Team Name' field is empty. Below, there are fields for 'Begin Date' (05/05/2015) and 'End Date'. There is also a section for 'Organizations' with a dropdown menu labeled 'Choose Options...'. The 'Save' button is in the top right.

To view or edit Assigned Clients, click the action gear  and click Assigned Clients.








The screenshot shows the 'Mentors' page with a search bar for 'Mentor Name'. Below the search bar, a table lists mentors. The 'Total Rows: 1' is indicated. An action gear icon is visible next to the first row. A dropdown menu is open, showing options: 'Contacts', 'Service Activities', 'Teams', and 'Assigned Clients' (highlighted with a red box).

Address	City, State, Zip Code	Phone	Category
740 East 3900 South	Salt Lake City, UT, 84107	801-888-9999	Mentor

Click the **+ Add New** button to create a new assignment or click the action gear  and click Edit to edit an existing assignment.

Mentor Assignments Summary <span>+ Add New</span>						
	Provider	Team	Client Name	Program	Begin Date	End Date
	 Edit	meg's test 3	Hmis, Harriett	St. Patricks Center	3/28/2012	Present
	 Delete		Bear, Mara	Adult Education	10/13/2011	Present
			Brown, Jackson	09 Head Start	10/7/2011	Present
	CaseWorthy	ESG 2nd Team	Arden, Child	Adult Education	9/29/2011	Present
	CaseWorthy	test team	Adon, James	St. Patricks Center	9/28/2011	Present
	CaseWorthy	Housing Assistance	Bear, Mara	Adult Education	9/24/2011	Present
	CaseWorthy		Bear, Jake	Adult Education	9/24/2011	Present

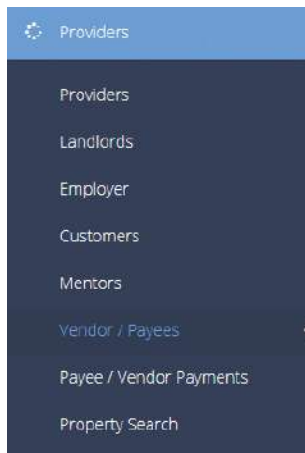
Fill out all info and click  **Save** when finished.

Mentor Assignment	
Mentor Assigned Client:	<input type="text"/> 
Team:	<input type="text"/> 
Program:	<input type="text"/>
Time period of case assignment	
Begin Date *	05/05/2015 
End Date *	Present  
Schedule Follow Up:	<input type="checkbox"/>

## Vendors and Payees

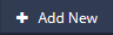
### Vendor / Payee Summary

**Objective:** Add edit or review vendors and payees.



The Vendor/Payee Summary form displays.

Vendor/Payee Summary					
Vendor / Payee Name: <input type="text"/>					
Total Rows: 64					
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.

Vendor/Payee

Enter the payee (Vendor) name and address information. The payee is to whom the check will be written.

Payee Name:

Address:

Address 2:

Zip Code:

City:

State:

Latitude:

Longitude:


Verify Address:


Provider Tax Information

Entry Type:

Tax ID:

Authorized for Payment: ☒

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.

Vendor/Payee Summary

Add New

Vendor / Payee Name:

Total Rows: 64

Search

	Address	Tax Type	W9 on File	Created Date	Payee ID
 Edit	9006 Kingswood Place, Woodway, TX 76712		Yes	9/14/2010	1
 View Information			No	7/11/2013	169
 Delete			No	2/9/2012	83
Adon, Maria	56 ave, BARNESVILLE, MN 56514				

The Vendor/Payee form displays. Any necessary changes can be made.

Click on the  Save button when finished.


Vendor/Payee

Enter the payee (Vendor) name and address information. The payee is to whom the check will be written.

Payee Name:

Address:

Address 2:


Zip Code:  

City:

State:

Latitude:

Longitude:

Verify Address:  Verify Address

Provider Tax Information

Entity Type:

Social Security Information:

Authorized for Payment: ☒

## Vendor Payee List


**Objective:** View a list of payees and view info from payments.


Vendor/Payee Summary 

Vendor / Payee Name:


Total Rows: 63 

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
Ameren	123 Test Dr., SAINT LOUIS, MO 63128		No	12/1/2011	74
Ameren			No	1/23/2014	173


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.

Vendor/Payee Summary 

Vendor / Payee Name:

Total Rows: 63 

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
Ameren	123 Test Dr., SAINT LOUIS, MO 63128		No	12/1/2011	74
Ameren			No	1/23/2014	173

 View Payments



The Vendor Payee List form displays.

Payee	Payee Created Date	Address	Total Amount	W9 on File	Payee ID
Yeryen	1/22/2014	740 East 3900 South, Salt Lake City UT	\$3.00	Yes	172
Total:			\$3.50		

Enter a date range and click on the Search button.


Payee	Payee Created Date	Address	Total Amount	W9 on File	Payee ID
View Payee Detail	1/22/2014	740 East 3900 South, Salt Lake City UT	\$3.00	Yes	172
Total:			\$3.50		

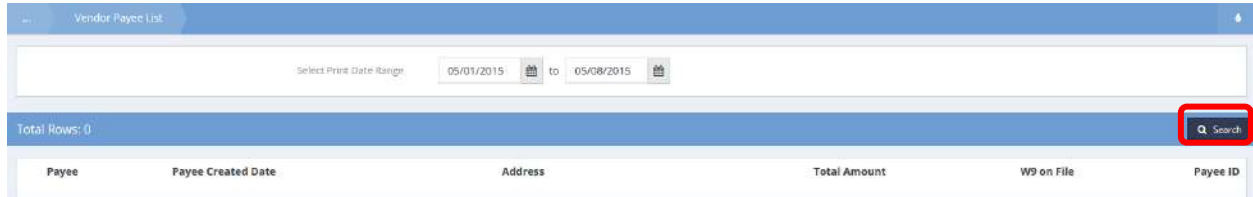
Click on the action gear icon for the desired row and select View Payee Detail. The Payee Check Detail form displays.

Printed Date	Check Number	Payee	On Behalf Of	Check Amount	BatchID
7/24/2014	10101047	Yeryen	Whapp, Mitch ksajd1987	\$3.00	356
Total:				\$3.50	

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 Search 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.



Payee	Payee Created Date	Address	Total Amount	W9 on File	Payee ID
-------	--------------------	---------	--------------	------------	----------

## Property Search

Using the Landlord Property Search form, properties may be located based on desired parameters.

Landlord Property Search

Enter date available, rent amounts, square footage range and number of bedrooms (all required) and click the Search button.

Available Date: 05/06/2015

Rent Amount: Min 1 and Max 9000.00

Sq Feet: Min 1 and Max 9000

Bed Rooms: Min 1

Location Search Options

City: State: Zip Code:

Additional Search Options

Handicap Accessible: Includes Basement: Parking Options:

Search

Available Dates - Begin / End	Landlord	Property Name	Address, City, State, Zip	Sq Feet	Bed Rooms	Rent Amount
-------------------------------	----------	---------------	---------------------------	---------	-----------	-------------

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.

Landlord Property Search

Location Search Options


City: State: Zip Code:

Additional Search Options

Handicap Accessible: Includes Basement: Parking Options:

Search

Available Dates - Begin / End	Landlord	Property Name	Address, City, State, Zip	Sq Feet	Bed Rooms	Rent Amount
1/1/2012 / Present	CaseWorthy	Provider Property - Test Case ...	740 East 3900 South, Apt #103, Salt Lak	875	2	\$0.00
1/1/2012 / Present	Landlord A	LA1	1234 East, SAINT LOUIS, MO	1000	2	\$0.00
1/1/2012 / Present	Lakewood Elementary	Landlord	123 South Main Street, Apt 1, SALT LAKE	2000	3	\$0.00
10/5/2012 / Present	Kings Safe House	Kings LandLord	.. CABO ROJO, PR	1800	2	\$600.00
10/22/2012 / Present	CaseWorthy	Provider Property Test - Case ...	740 East 3900 South, APT 4, Salt Lake Ci	587	1	\$0.00
1/22/2014 / Present	Catholic Charitable Bureau Archdiocese of Boston	Apartment Mission	.. SCHENECTADY, NY	650	2	\$0.00
1/22/2014 / Present	Catholic Charitable Bureau Archdiocese of Boston	First Mansion	.. SCHENECTADY, NY	1000	3	\$0.00

To edit a property, click the action gear  and click Edit Property.

The Provider Property form displays.

Landlord Property Search

Location Search Options

City  State  Zip Code

Additional Search Options

Handicap Accessible ☐ Includes Basement ☐ Parking Options



Search

Available Dates - Begin / End	Landlord	Property Name	Address, City, State, Zip	Sq Feet	Bed Rooms	Rent Amount
<input checked="" type="checkbox"/> Edit Property	CaseWorthy	Provider Property - Test Case ...	740 East 3900 South, Apt #103, Salt Lak	875	2	\$0.00
1/1/2012 / Present	Landlord A	LA1	1234 East, SAINT LOUIS, MO	1000	2	\$0.00
1/1/2012 / Present	Lakewood Elementary	Landlord	123 South Main Street, Apt 1, SALT LAKE	2000	3	\$0.00

Make any changes and click  Save when finished.

Provider Property

Property Description #: Provider Property - Test Case 4

Available Begin Date #: 01/01/2012  Available End Date #: Present 

Property Information

Total SqFeet #: 875

Bed Room: 2

Parking:

Handicap Accessible: ☐

Utility Included: Choose Options...



Lease Type #: Six Months

Bath Room: 1

Storage:

Has Basement: ☐

Rent Information

Available Begin Date #: 01/01/2012  Available End Date #: Present 

Market Rent/Lease Amount: 0.00

Subsidized Rent/Lease Amount: 0.00

Rent/Lease Deposit: 0.00

Subsidized Deposit Amount: 0.00

HOA: 0.00

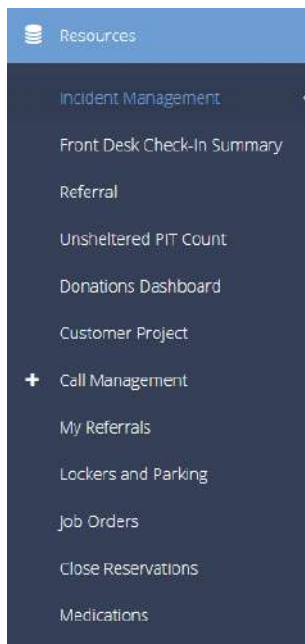
Other Deposit Type:

Other Deposit Amount: 0.00

Save Cancel

## Resources

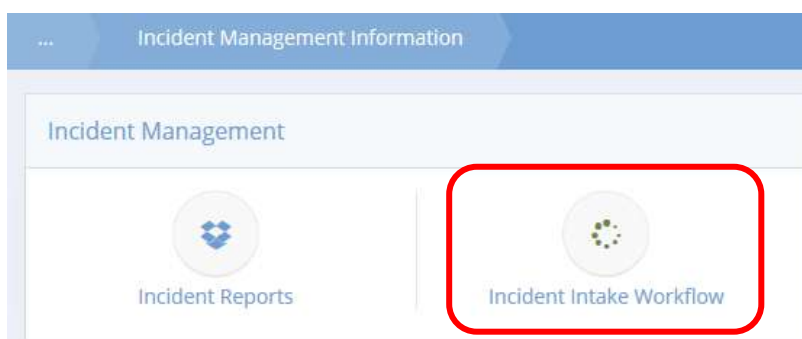
### Incident Management



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.


Find User and Client Lookup

Find User and Client

Client or User Name  Entity Type

Search

Client or User Name	Type	Created Date	Entity ID
Adams, Adam	Client	11/18/2014	8545
Adams, Tracy	Provider Contact	2/24/2015	11763
Adamson, Allen	Client	10/25/2010	1444
Adamson, Amber	Client	9/8/2010	1348
Adamson, Arnie	Client	4/25/2014	8621
Adamson, Ray	Client	5/17/2012	2282
Add, Quick	Client	3/6/2015	10139
Add2, Quick	Client	3/6/2015	10140

Use the filters and  Search button to locate the desired client or user and when found, click to return to the previous form.

Combined Participants Incident (Spreadsheet)

Total Rows: 0

Client / User Name *	Type	Participation Type *	Injury Type	Medical Attn. Req.	Gender	Birth Date
<input checked="" type="checkbox"/> Cliente, Nuevo 		Aggressor				



Participant Related Description

 Probation

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.



Incident Action / Resolutions (Edit)


Begin Date: 07/02/2015  Target Completion Date: 


ActionType:

Description:

Status: Open

Assign Team:  Assigned To Staff: 

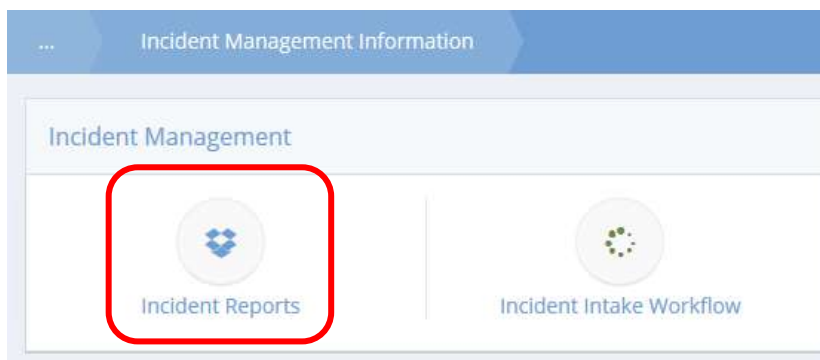
Action Taken By: 

Enter any other desired fields and click  Save when finished. The workflow is now complete and the incident has been recorded.

Incident Report w/d			
Workflow is now complete.			
Status	Step Name	Completed By	Completed Date
✓	Incident Report (Add)	Ellason, Adrian	7/2/2015
✓	Combined Participants Incident (Spreadsheet)	Ellason, Adrian	7/2/2015
✓	Incident Action / Resolutions (Edit)	Ellason, Adrian	7/2/2015

## View Files (Incident Management)


**Objective:** View or add files in an incident report.

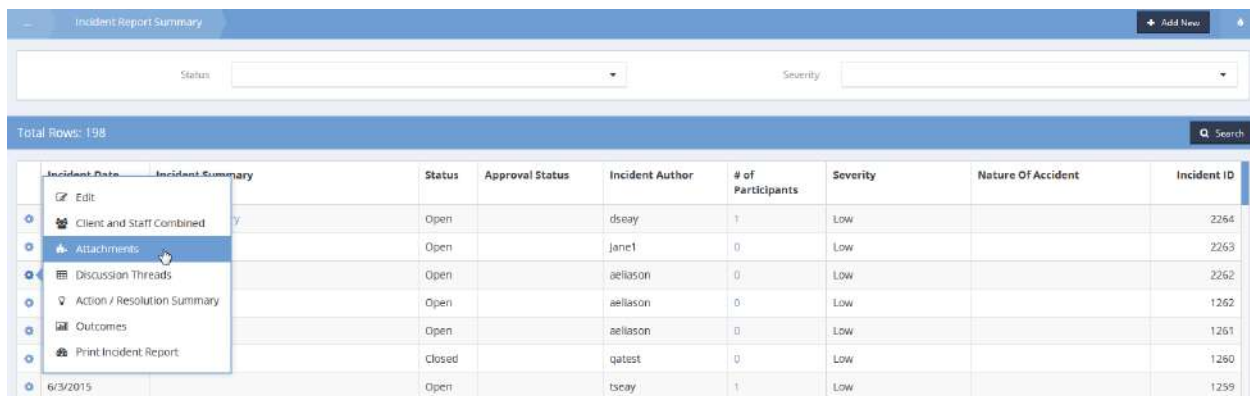


Click the icon for Incident Reports. The Incident Report Summary form displays.

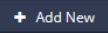
Incident Report Summary								
<div> <div>Status</div> <div>Severity</div> </div>								
Total Rows: 198								
Incident Date	Incident Summary	Status	Approval Status	Incident Author	# of Participants	Severity	Nature Of Accident	Incident ID
6/15/2015	Incident Summary	Open		dseay	1	Low		2264
6/15/2015	et fb ggy	Open		jane1	0	Low		2263
6/15/2015	rgsdofads	Open		aellason	0	Low		2262
6/15/2015	fdhsdf	Open		aellason	0	Low		1262
6/15/2015	someone fdh	Open		aellason	0	Low		1261
6/4/2015		Closed		qatest	0	Low		1260
6/3/2015		Open		tseay	1	Low		1259
6/15/2015	TEST FILE TEST	Open	Approved	Adrian	5	Medium	Physical Injury	1258



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



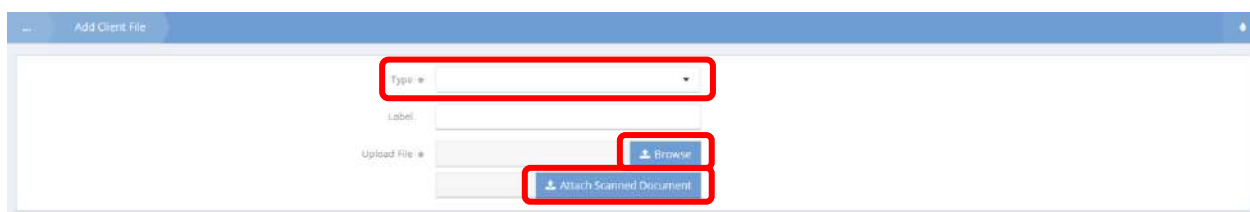
Incident Date	Incident Summary	Status	Approval Status	Incident Author	# of Participants	Severity	Nature Of Accident	Incident ID
6/3/2015		Open		dseay	1	Low		2264
		Open		Jane1	0	Low		2263
		Open		aellason	0	Low		2262
		Open		aellason	0	Low		1262
		Open		aellason	0	Low		1261
		Closed		qatst	0	Low		1260
6/3/2015		Open		tseay	1	Low		1259


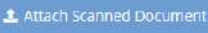

The View Incident Activity Files form displays. To add a new file to the incident report, click the  button.




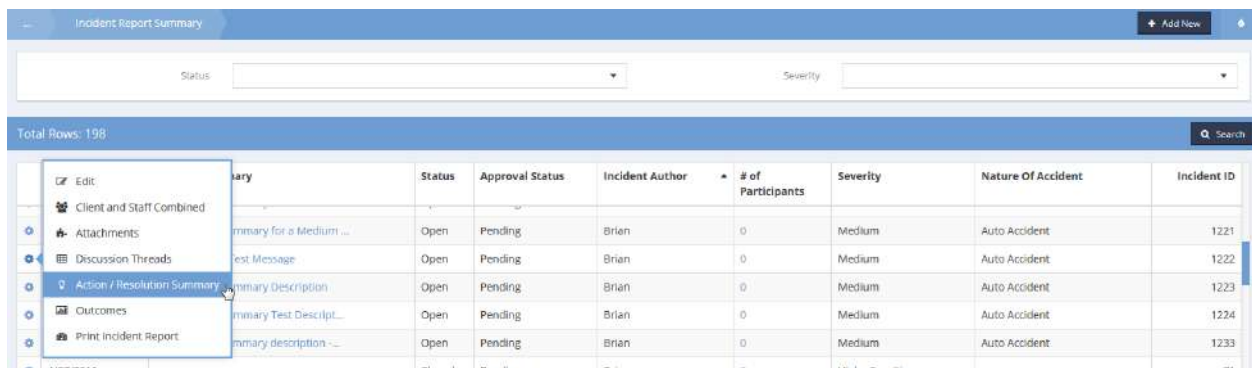
Created Date	File Label	Create By	Type
7/2/2015 3:06 AM	Penguins.jpg	Elason, Adrian	Incident Report

The Add Client File form displays.



Select a file type from the drop-down list and use the  button to locate the desired file on the computer being used. Alternatively, if using a scanner simply click the  button. Click  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.



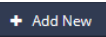

Incident Report Summary

Status:  Severity:

Total Rows: 198

	Summary	Status	Approval Status	Incident Author	# of Participants	Severity	Nature Of Accident	Incident ID
	Summary for a Medium ...	Open	Pending	Brian	0	Medium	Auto Accident	1221
	Test Message	Open	Pending	Brian	0	Medium	Auto Accident	1222
	Summary Description	Open	Pending	Brian	0	Medium	Auto Accident	1223
	Summary Test Descript...	Open	Pending	Brian	0	Medium	Auto Accident	1224
	Summary description ...	Open	Pending	Brian	0	Medium	Auto Accident	1233

Context menu options: Edit, Client and Staff Combined, Attachments, Discussion Threads, Action / Resolution Summary, Outcomes, Print Incident Report.

The Action Resolution form displays. Click the  button to add a new (or click the action gear  icon and click Edit to edit an existing) action resolution.



Action Resolution



	Begin Date	End Date	Description	Status	Assign To Team	Assign To User	Context ID	Resolution ID
	3/5/2015		Need to follow-up with Mitch on his broken wrist and make sure he's doing well.	Open	Case Mngt	Wilson, Nina	1206	484
	3/5/2015	3/5/2015	Follow-up with with Karen and she agreed to take a class in Anger Management	Closed	Management	Bingel, Brian	1206	485

The Incident Action / Resolutions (Edit) form displays.



Add New

Edit Incident Action/Resolution

Begin Date: 09/02/2015

Target Completion Date:

Action Type:

Description:


Status: Open


Follow up:

Assign Team:

Assigned To Staff:

Action Taken By:

Select an action type, add a description and select a status. Add any other desired information and click  when finished.

To view incident outcomes, click the relevant action gear  icon and select Outcomes.

Incident ID	Status	Approval Status	Incident Author	# of Participants	Severity	Nature Of Accident
2264	Open		dseay	1	Low	
2263	Open		jane1	0	Low	
2262	Open		aellason	0	Low	
1262	Open		aellason	0	Low	
1261	Open		aellason	0	Low	

The Incident Outcomes form displays.


Created Date	Description	Reference	Domain Name	Score Description	Incident ID	Outcome ID
3/9/2015	Client harassed another Client waiting to use the computer	Incident Report	Incident Report	Incident Score - 2	1206	1855
3/5/2015	Follow-up with with Karen and she agreed to take a class in Anger Management	Action Resolution	Incident Report - Actions Resolutions	Incident Action Score - 1	1206	1845

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.

Resource	Event	Name	Reservation Start Date	Reservation End Date	Service	Absence	Absence Type	Absence Reason
----------	-------	------	------------------------	----------------------	---------	---------	--------------	----------------

On the Front Desk Check-in Summary form, enter a provider and date range. Optionally choose a resource and event. Click the  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

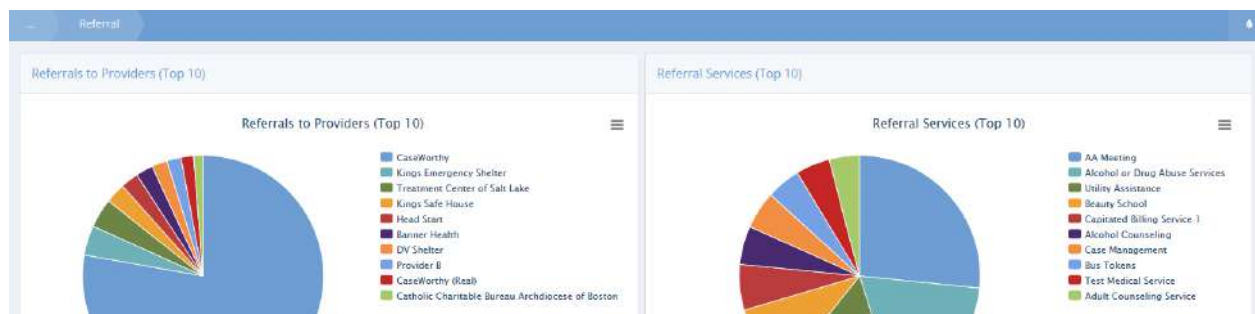


Resource	Event	Name	Reservation Start Date	Reservation End Date	Service	Absence	Absence Type	Absence Reason
Glancing Opportunity	Golf Tournament Planning	Adkins, Adele	12/1/2014 9:00 AM	12/1/2014 9:30 AM				
Glancing Opportunity	Golf Tournament Planning	Unger, Wally	12/3/2014 9:30 AM	12/3/2014 10:00 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	Timmions, Terry	12/22/2014 11:00 AM	12/22/2014 11:30 AM				

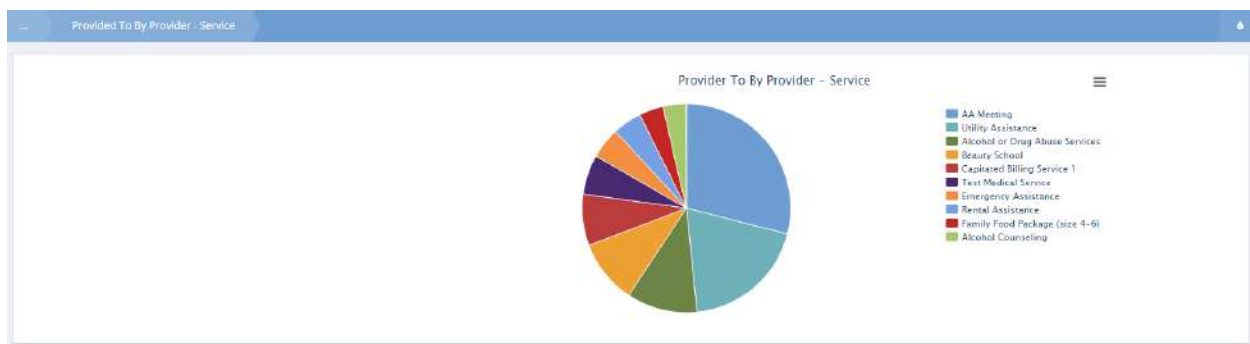
## Referrals

### 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.

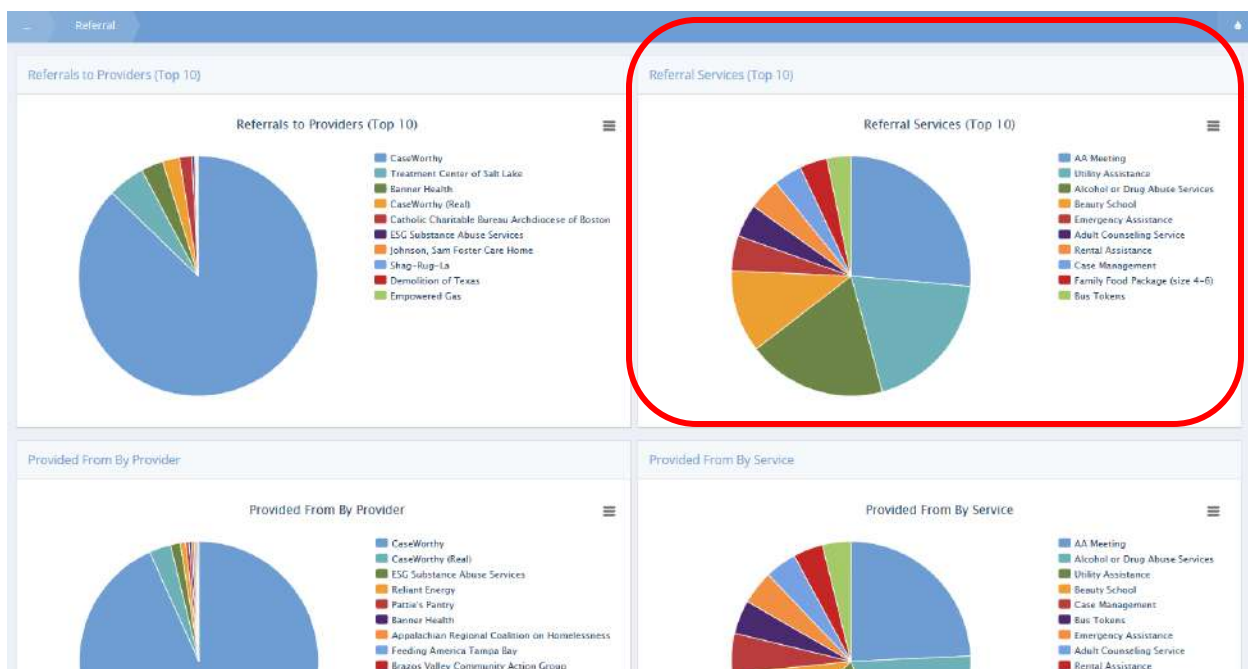
The Client By Referral form displays. All relevant referrals display in the form.

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	Isample prog (HIV)	AA Meeting	Allen, Remy		Native Hawaiian or Other Pacific Islander	U.S. Citizen	Non-Hispanic or Latino
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	Aliso, Fred	10/11/2000	American Indian or Alaska Native	Eligible Non-Citizen	Non-Hispanic or Latino
CaseWorthy	CaseWorthy	Adult Education	AA Meeting	Aliso, Fred	10/11/2000	American Indian or Alaska Native	Eligible Non-Citizen	Non-Hispanic or Latino
CaseWorthy	CaseWorthy	Adult Education	AA Meeting	Aliso, Fred	10/11/2000	American Indian or Alaska Native	Eligible Non-Citizen	Non-Hispanic or Latino

## Client By Referral

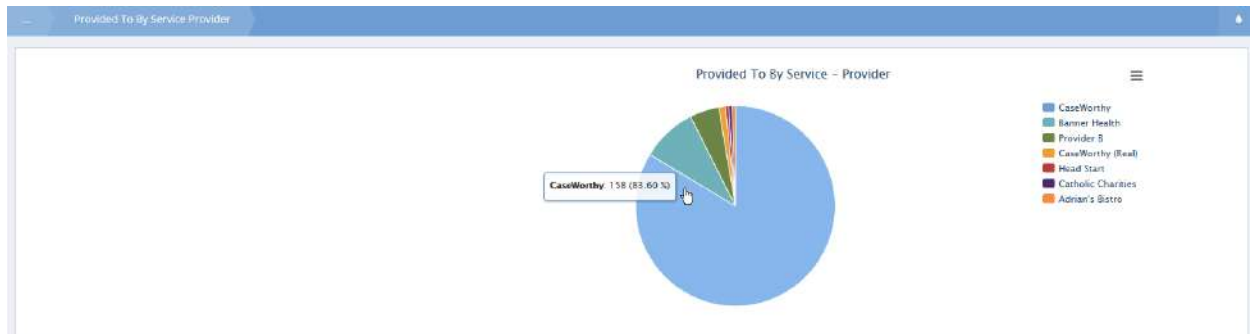
**Objective:** View and drill into client referral data.

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.

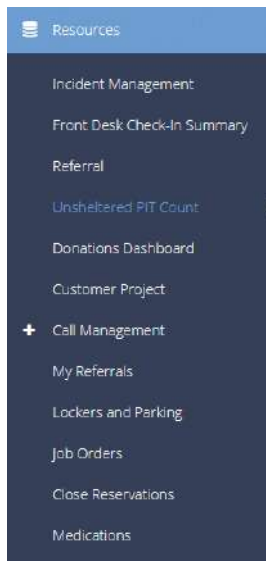
Client By Referral

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	Adori, 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	Allo, Fred	10/11/2000	American Indian or Alaska Native	Eligible Non-Citizen	Non-Hispanic or La
CaseWorthy	CaseWorthy	Adult Education	AA Meeting	Allo, Fred	10/11/2000	American Indian or Alaska Native	Eligible Non-Citizen	Non-Hispanic or La
CaseWorthy	CaseWorthy	Adult Education	AA Meeting	Allo, Fred	10/11/2000	American Indian or Alaska Native	Eligible Non-Citizen	Non-Hispanic or La
CaseWorthy	CaseWorthy	Adult Education	AA Meeting	Allo, 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.

A screenshot of the 'Unsheltered Beds Summary' table. The table has three columns: Count Date, Type, and County / Location. It contains six rows of data. The 'Add New' button in the top right corner is highlighted with a red box. The 'Edit' action in the first row's action menu is also highlighted with a red box.

Count Date	Type	County / Location
1/26/2012	Unsheltered	Location 1
1/26/2012	Unsheltered	Location 4
1/26/2012	Unsheltered	Location 2
1/26/2012	Unsheltered	Location 5
1/26/2012	Unsheltered	Location 3
1/26/2012	Unsheltered	Location 2

The Enter Unsheltered Bed Information form displays.

Enter Unsheltered Bed Information

Point in Time Date \*

Population in the Count \* Unsheltered

County / Location \*

1. Persons in Household with at least 1 Adult and 1 Child

Number of Persons \* 0

Number of Persons Under Age 18 \* 0

Number of Persons Age 18 to 24 \* 0

Number of Persons Age Over 24 \* 0

2. Persons in Households with only children (No adults)

Number of Households \* 0

Number of Persons (Age 17 or under) \* 0

Number of One-Child Households \* 0

Number of Multi-Child Households \* 0

3. Persons in Households without children

Number of Persons (Adult) \* 0

Number of Persons Age 18 to 24 \* 0

Number of Persons Persons Age Over 24 \* 0

5.a. through 7.d. - Additional PIT Questions

5. a. Chronically Homeless Individuals \* 0

5. b. Chronically Homeless Families \* 0

6. a. Number of Veterans \* 0

6b. Number of Female Veterans \* 0


7. a. Number of Severely Mentally Ill \* 0

7. b. Number of Chronic Substance Abuse \* 0

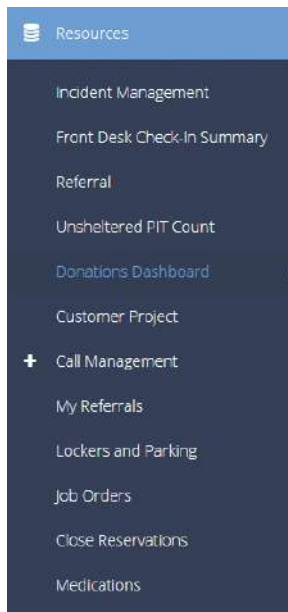
7. c. Individuals with HIV/AIDS \* 0

7. d. Victims of Domestic Violence \* 0

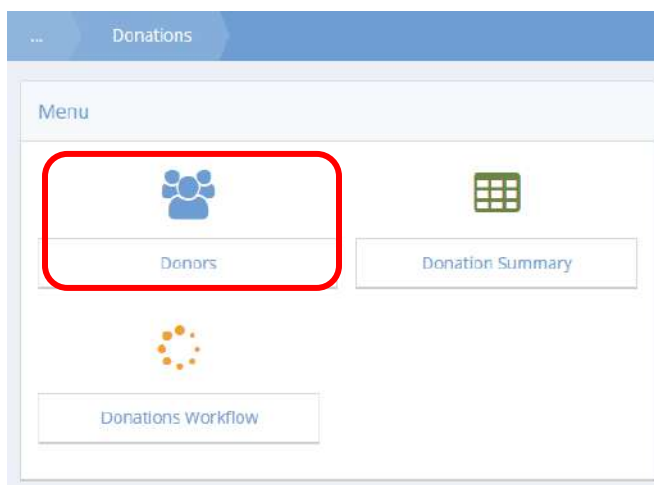
Save Cancel

All fields are required. Enter all information and click on the  Save 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.

Summary of Donations Grouped By Donor			<a href="#">Add Donations (Workflow)</a>
Total Rows: 22			<a href="#">Search</a>
Provider Donor Name	Donor Name	Total Value	
CaseWorthy	Bred, Cody	\$1,500.00	
CaseWorthy	Brian, Brian	\$900.00	
CaseWorthy	CaseWorthy	\$1,559.46	
CaseWorthy	Cia, Stuart	\$2.00	
CaseWorthy	Davis, Codey	\$540.00	
CaseWorthy	Donator, Donator	\$2,566.66	

To add a donation, select the [Add Donations \(Workflow\)](#) button.

The workflow begins with a question form. Select the donation type by answering the question presented.

Question

Is this a donation a that will go into inventory? i.e. a vehicle, furniture or clothing?

☒ Yes - Inventory item
   
☐ No - Non-Inventory item

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.

Inventory (Add)

Description \*

Inventory Status \* New

Type \* Automobile

Location

Unit of Measure \* Each

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

Begin Date \* 03/11/2015

End Date \*

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

Units \* 1

Rate \* 0.00

Total \$0.00

Upload Image [Browse](#)


Post Auto Information \* ☒

If the donation item is an automobile, the resulting form requires information such as vehicle type and Vehicle Identification Number.

The screenshot shows a web application window titled "Post Auto Information". Inside, there's a sub-header "Automobile Posting from Donations". Below this, a light blue box contains the instruction "Enter the Automobile Detail Information below". The form itself consists of several input fields arranged vertically on the left side of a larger container:

- Type \*
- Make \*
- Model \*
- VIN \*
- Year \*
- Transmission Type \*
- Condition \*

Each field has a small asterisk indicating it is required. The fields are currently empty.

Once all the required information is entered, select the  Save 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.

**Donations vehicle (input)**

---

### Donation Item Description

Inventory:	<input type="text" value="Delorean"/>
Auto Make:	<input type="text" value="DMC-12"/>
Serial Number:	<input type="text" value="1111111112"/>
Year:	<input type="text" value="1983"/>

---

Enter any additional information about this donation.

Donor Last Name:	<input type="text"/> <input type="button" value="Q"/>	Donor First Name:	<input type="text"/>
Donation Date:	<input type="text" value="03/11/2015"/> <input type="button" value="📅"/>		
Inventory Type:	<input type="text" value="Automobile"/>		
Donation Type *	<input type="text" value="Automobile"/>		
Unit Of Measure:	<input type="text" value="Dollar"/>		
Units:	<input type="text" value="1.00"/>		
Rate:	<input type="text" value="0.00"/>		
Total Donation Value:	<input type="text" value="\$11,111.12"/>		

---


### Describe the donation in more detail.

Note

Rich Text Editor Toolbar:

- B I U (Bold, Italic, Underline)
- Text Color, Background Color
- Link, Unlink, Image, Video, Audio, Embed
- Table, List, Indent, Outdent, Paragraph Styles
- Spell Checker, Undo, Redo, Print, Help

Words: 0

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.

Summary of Donations Grouped By Donor

Total Rows: 22


	Donor Name	Total Value
detail	Bred, Cody	\$1,500.00
Update	Brian, Brian	\$900.00
CaseWorthy	CaseWorthy	\$1,559.46
CaseWorthy	Cla, Stuart	\$2.00
CaseWorthy	Davis, Cody	\$540.00
CaseWorthy	Donator, Donator	\$2,566.66

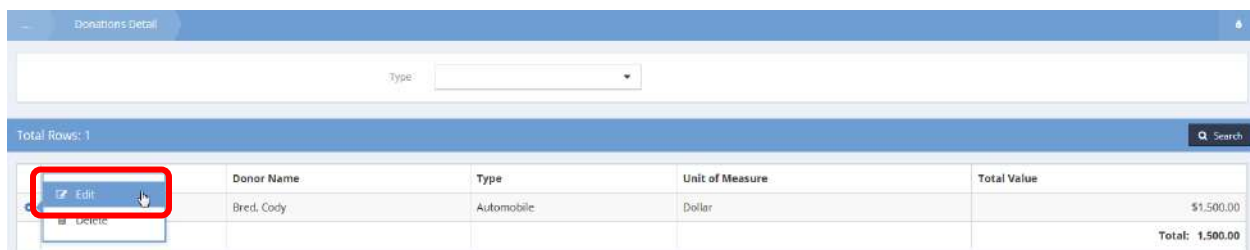
The Donations Detail form displays.



The screenshot shows the 'Donations Detail' form. At the top, there is a 'Type' dropdown menu. Below it, a blue bar indicates 'Total Rows: 1' and a 'Search' button. The main table has five columns: Date, Donor Name, Type, Unit of Measure, and Total Value. It contains one row for a donation dated 1/24/2014 from 'Bred, Cody' for an 'Automobile' valued at '\$1,500.00'. A 'Total: 1,500.00' is shown at the bottom right of the table.


Date	Donor Name	Type	Unit of Measure	Total Value
1/24/2014	Bred, Cody	Automobile	Dollar	\$1,500.00
				Total: 1,500.00

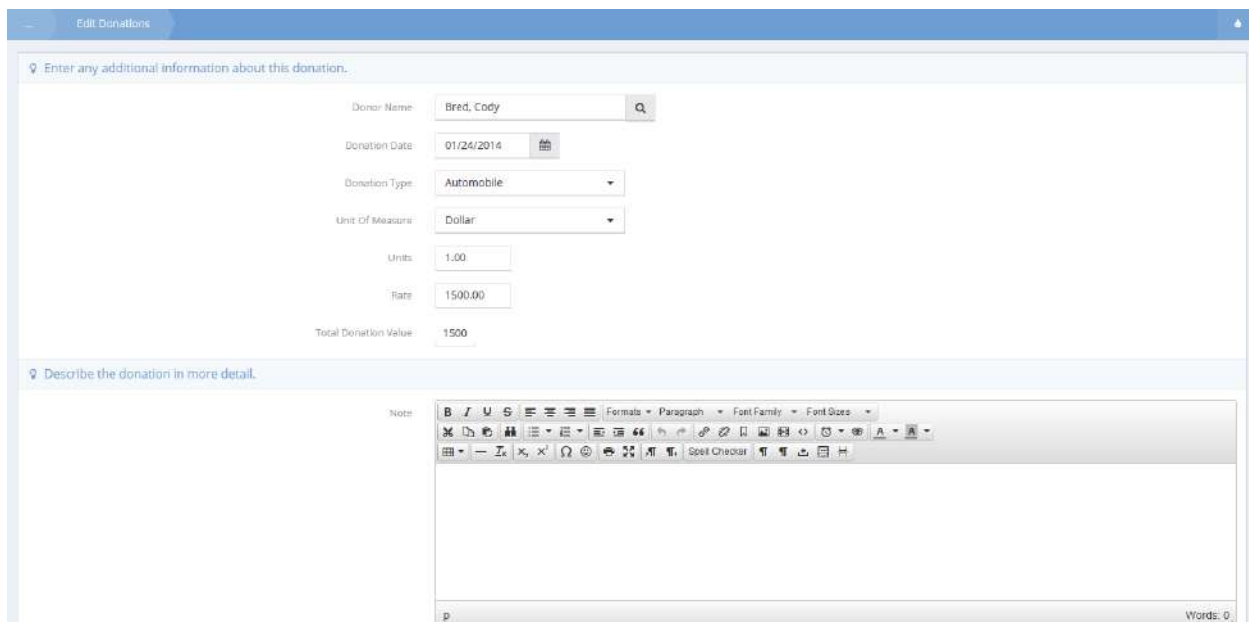
To edit a donation, click on the action gear  for the desired donation and select Edit from the pop-up menu that appears.



This screenshot is identical to the previous one, but with a red rectangle highlighting the 'Edit' option in the action menu that appears when the gear icon is clicked on the first row of the table.

Date	Donor Name	Type	Unit of Measure	Total Value
1/24/2014	Bred, Cody	Automobile	Dollar	\$1,500.00
				Total: 1,500.00

The Edit Donations form displays. Make any desired changes to the donation information and click on the  Save button.



Enter any additional information about this donation.

Donor Name: Bred, Cody

Donation Date: 01/24/2014

Donation Type: Automobile

Unit Of Measure: Dollar

Units: 1.00

Rate: 1500.00

Total Donation Value: 1500

Describe the donation in more detail.

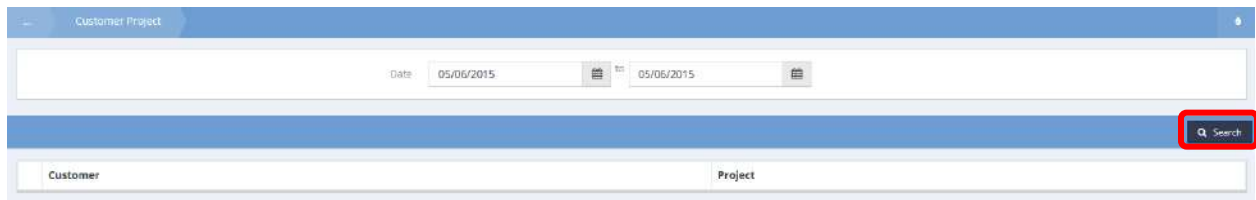
Rich text editor toolbar: B, I, U, ABC, Bulleted List, Numbered List, Indent, Outdent, Undo, Redo, Link, Unlink, Image, Table, Spell Checker, Font Color.

Words: 0



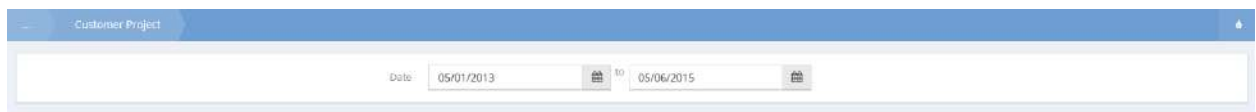
## Customer Project

Using the Customer Project form, a project can be looked up and an invoice can be generated for it.




The screenshot shows the 'Customer Project' form. At the top, there is a header bar with the title 'Customer Project'. Below it, a date range is set from '05/06/2015' to '05/06/2015'. A 'Search' button is highlighted with a red box. Below the date range, there are two input fields labeled 'Customer' and 'Project'.

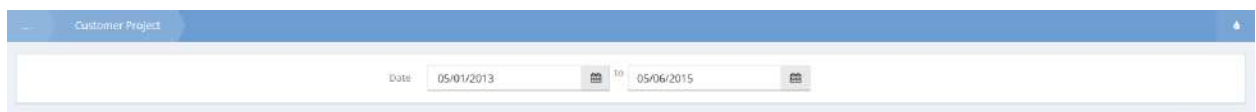
Enter a date range and click the  button. Projects display in the spreadsheet below.




The screenshot shows the 'Customer Project' form with the date range set from '05/01/2013' to '05/06/2015'. The 'Search' button is highlighted with a red box.


Customer	Project
Appalachian Regional Coalition on Homelessness	Monthly Support
CaseWorthy	Served Shelter Meal
CaseWorthy (Real)	4.0 - Enhancements
CaseWorthy™ Dev	Test
ECG	Test Project
Goodwill Houston - Project Time (TEST)	Employment Contract Services
Goodwill Houston - Project Time (TEST)	Data Conversion

To generate an invoice, click the action gear  and click Generate Invoice. The Create Invoice Line form displays.

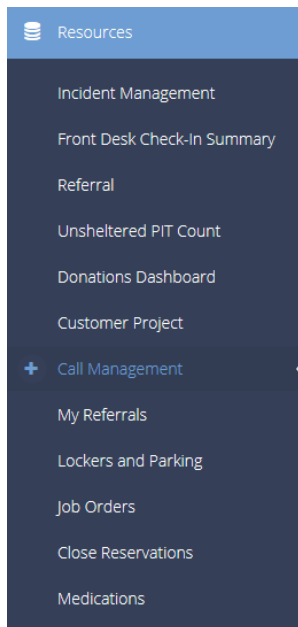


The screenshot shows the 'Customer Project' form with the date range set from '05/01/2013' to '05/06/2015'. The 'Search' button is highlighted with a red box.

Customer	Project
Appalachian Regional Coalition on Homelessness	Monthly Support
 CaseWorthy	Served Shelter Meal
CaseWorthy (Real)	4.0 - Enhancements
CaseWorthy™ Dev	Test
ECG	Test Project
Goodwill Houston - Project Time (TEST)	Employment Contract Services
Goodwill Houston - Project Time (TEST)	Data Conversion

Enter a date and description and click the  Save 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.

 A screenshot of the 'Call Intake Summary' form. At the top right, there is a '+ Add New' button highlighted with a red box. Below the header, there is a search bar and a table of call intake items. The table has columns for Start Date/Time, Total Time In Seconds, Caller Type, Encounter Type, Status, and Call ID.
 

Start Date/Time	Total Time In Seconds	Caller Type	Encounter Type	Status	Call ID
2/18/2015 3:49 PM	38	Existing Client	Phone	Open	118
2/18/2015 2:47 PM	36	Existing Client	Phone	Open	117
2/18/2015 12:11 PM	50	Existing Client	Phone	Open	116
2/4/2015 4:10 PM	515	Anonymous	Phone	Open	115
9/3/2014 1:47 PM	4	Existing Client	Phone	Open	113
5/28/2014 10:03 AM	39	Anonymous	Phone	Open	111
5/20/2014 3:39 PM	52	Relative	Phone	Open	110

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.

Anonymous callers call on behalf of a client.  
Existing Client callers call on their own behalf, or on behalf of another client.  
Friend and Relative callers always call on behalf of a client.  
New Client callers call on their own behalf, but can't call on behalf of another client.

Time: Call Time  
00:00:46  
Start

Type of Caller: Existing Client

Last Name: [Search]

Cell Phone: [Text]

Caller General Information: [Text]

Reason for Call: [Text]

Encounter Type: Phone

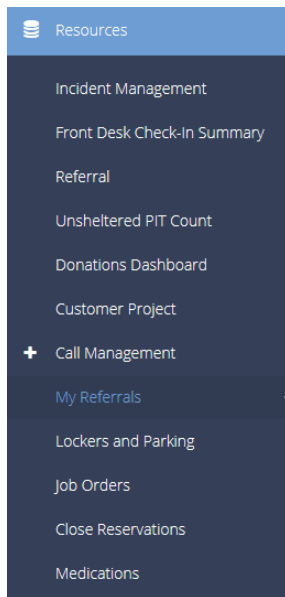
First Name: [Text]

Call Note: [Rich Text Editor]

Status: Open

Restriction: Shared

## 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.

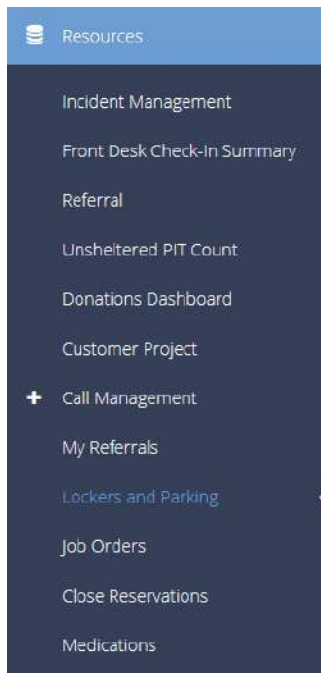
Referrals To Provider CaseWorthy

Status: Referred

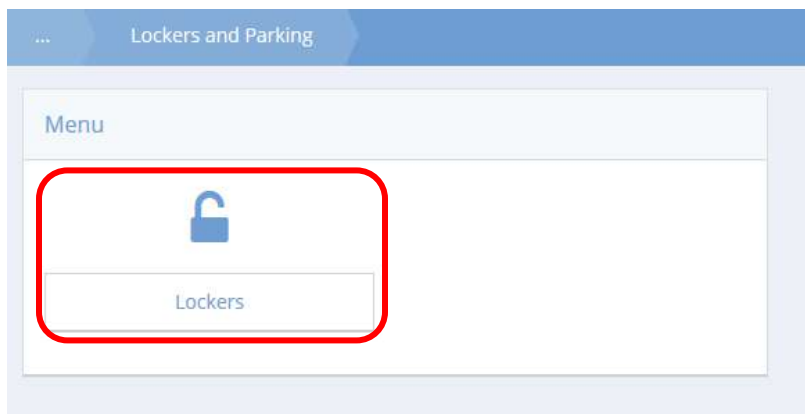
Total Rows: 248


Date	Service Description	Client Name	Referring Provider ID	Referring Provider	Referred Provider ID	Status
2/26/2015	Adult Counseling Service	Allison, Alice	14	CaseWorthy	14	Referred
	ment Referral	ASRLast, ASRPfirst	131	Catholic Charitable Bureau Archdiocese of Boston	14	Referred
	re Services - Referral	Wainwright, Adam	14	CaseWorthy	14	Referred
		Bosell, Steve	2148	456yujik	14	Referred
	ing	Bosell, Steve	2161	45rtyhj	14	Referred
	management	Bosell, Steve	14	CaseWorthy	14	Referred

## 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  Search button. Lockers fitting the specified parameters display in the spreadsheet below.

Locker Name *	Client Name	Begin Date *	Resource *	Type *	End Date *
---------------	-------------	--------------	------------	--------	------------



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.


Locker Check In

Resource: Manor Emergency Housing Type: Lockers

Begin Date: 05/06/2015 to 05/06/2015 End Date: Present

Search

Locker Name *	Client Name	Begin Date *	Resource *	Type *	End Date *
<input checked="" type="checkbox"/> B-3	Duplicate, Danni	1/23/2013	Manor Emergency Housing	Lockers	Present
<input checked="" type="checkbox"/> B-4 	simon, simle 	04/17/2012	Manor Emergency Housing	Lockers	Present
<input checked="" type="checkbox"/> C-2	Grace, Ben	11/3/2011	Manor Emergency Housing	Lockers	Present
<input checked="" type="checkbox"/> C-3	Erminder, Ellie	12/12/2011	Manor Emergency Housing	Lockers	Present

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.

Find Client no Locker Lookup

Last Name:  First Name:  Birth Date:

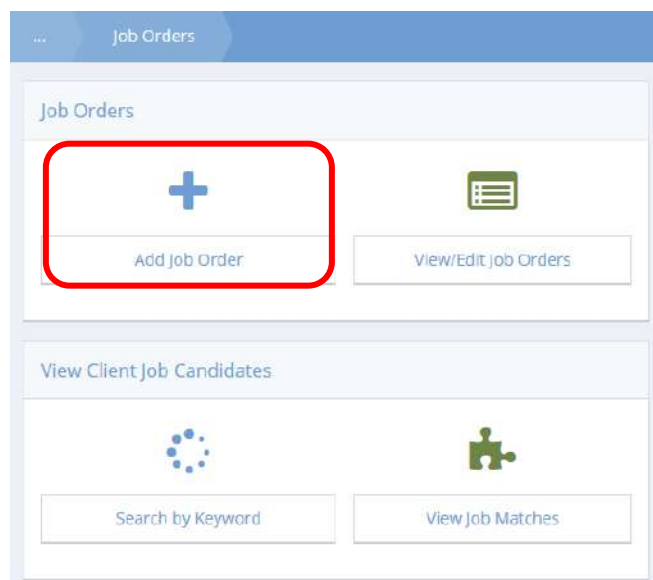
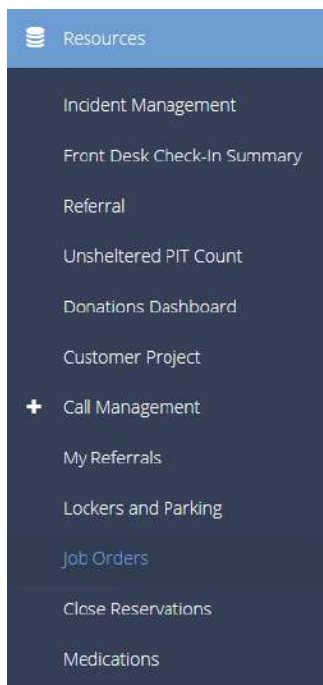
SSN:  Social Card ID:

Search

## 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)

The screenshot shows the 'Create Job Order Workflow' interface. The left sidebar contains a menu with 'Job Opening (Add)' selected. The main area is titled 'Job Opening Information' and contains the following fields:

- Employer: Searchable text field.
- Order Date: 05/06/2015 (with a calendar icon).
- # Of Open Positions: Text field.
- Posting URL: Text field.
- Job Description: Rich text editor with a toolbar (Bold, Italic, Underline, etc.) and a 'Words: 0' counter.
- Will Interview: Yes (dropdown).
- Contact Person: Searchable text field.
- Status: Open (dropdown).
- Job Title: Text field.
- Employer Website: Text field.
- Need Drug Screen: Checkbox.

Below the main form is the 'Posting Date Range' section with 'Begin Date' (05/06/2015) and 'End Date' (calendar icon). At the bottom is the 'Position Information' section with 'Position Type' and 'Pay Type' dropdowns. The bottom right has 'Save' and 'Cancel' buttons.

This screenshot is a closer view of the 'Job Opening (Add)' form. A red rectangular box highlights the search icon (magnifying glass) in the 'Contact Person' field. The form fields are the same as in the previous screenshot, including Employer, Order Date, # Of Open Positions, Posting URL, Job Description, Will Interview, Status, Job Title, Employer Website, Need Drug Screen, Posting Date Range, and Position Information.

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  button.

**Note:** *Clicking on the magnifying glass  icon for Contact Person opens a new form, Job Order Contact (Select).*

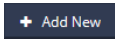
### Job Order Contact (select)




Select Job Order Contact Lookup

Total Rows: 0

Name	Phone	Email
------	-------	-------




*If the desired contact person does not appear on the list presented, click on the  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.

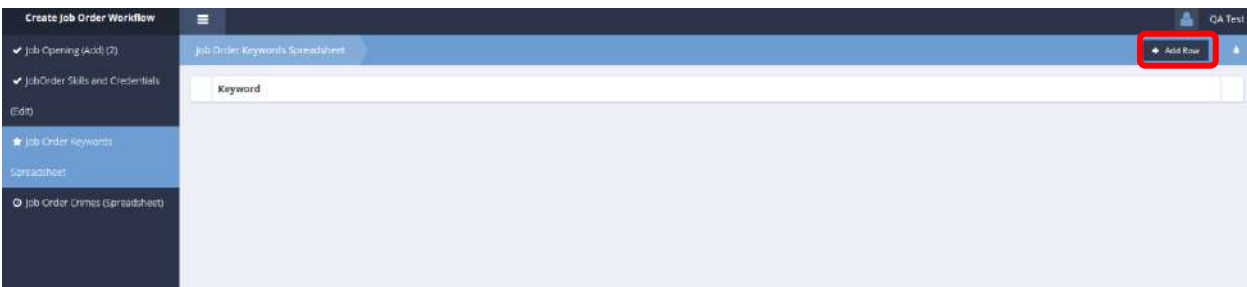


Enter the desired skill or credential and click on the  Save button.

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.

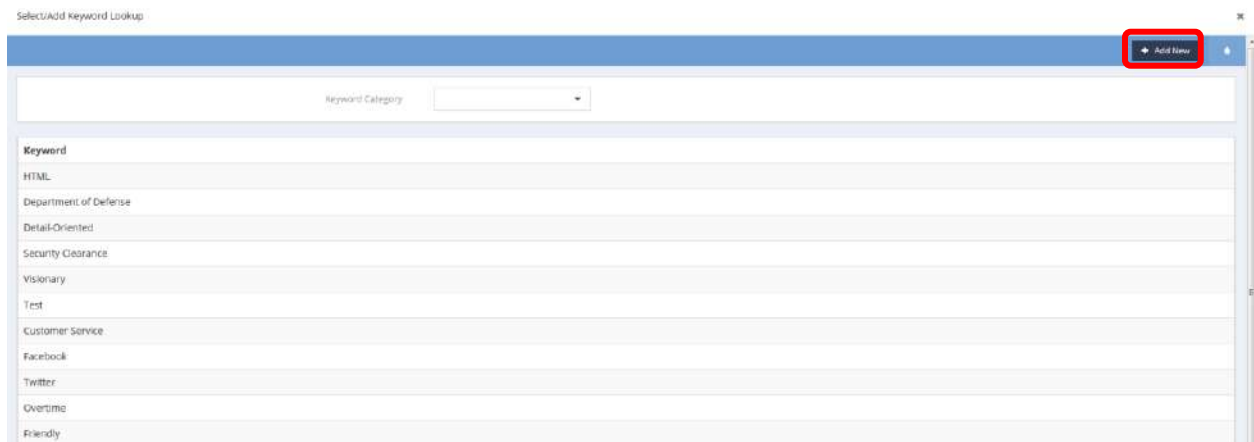


Click on the **+ Add Row** button. A new row appears.



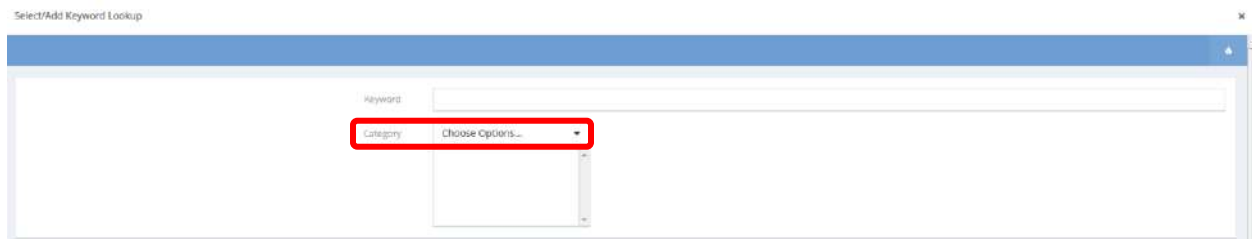
Click on the magnifying glass  icon. The Select/Add Keyword Lookup form displays.

### 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



The screenshot shows a dialog box titled "Select/Add Keyword Lookup". It contains a "Keyword" text input field and a "Category" dropdown menu. The dropdown menu is open, showing "Choose Options..." and a list of categories. A red rectangle highlights the "Category" dropdown menu.

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.



The screenshot shows a table titled "Job Order: Keywords Spreadsheet". It contains two rows of keywords: "Security Clearance" and "HTML". Each row has a checkbox on the left and a search icon on the right. The "Add Row" button is visible in the top right corner.

Click on the  Save button.

## Job Order Crimes

The next step in the workflow displays the Job Order Crimes (Spreadsheet).


### Job Order Crimes (Spreadsheet)

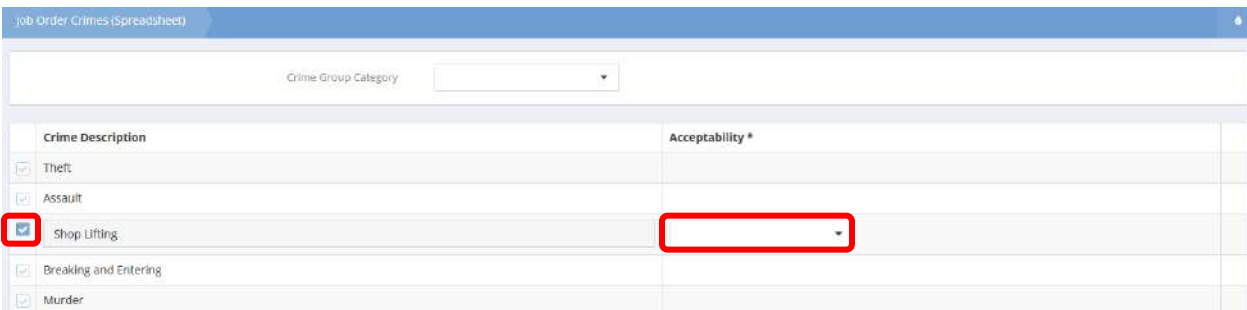
The screenshot shows the 'Create Job Order Workflow' interface. On the left is a sidebar with a list of steps: 'Job Opening (Add) (G)', 'Job Order Skills and Credentials (Edit)', 'Job Order Keywords', 'Spreadsheet', and 'Job Order Crimes (Spreadsheet)'. The 'Job Order Crimes (Spreadsheet)' step is selected and highlighted. The main area displays the 'Job Order Crimes (Spreadsheet)' tab. At the top, there is a 'Crime Group Category' dropdown menu, which is highlighted with a red box. Below this is a table with two columns: 'Crime Description' and 'Acceptability \*'. The table contains a list of crimes with checkboxes in the 'Crime Description' column. The crimes listed are: Theft, Assault, Shop Lifting, Breaking and Entering, Murder, Probation Violation, Vandalism, Exposure, Inappropriate Touch, Rape, Arson, Auto Theft, Criminal Trespassing, DWI, Grand Theft, Parole Violation, and Possession. At the bottom right of the interface are 'Save' and 'Cancel' buttons.

To filter the list displayed, click on the down arrow ▼ icon for Crime Group Category. Select from the drop-down list that displays.


This image is a close-up of the 'Crime Group Category' dropdown menu. The menu is open, showing a list of options: '--Nothing--', 'Civil', 'Felony', and 'Misdemeanor'. The 'Felony' option is highlighted.

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.



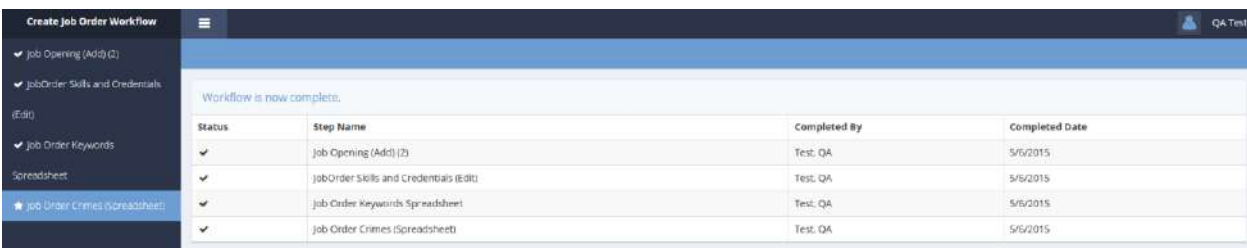
Crime Description	Acceptability *
<input checked="" type="checkbox"/> Theft	
<input checked="" type="checkbox"/> Assault	
<input checked="" type="checkbox"/> Shop Lifting	
<input checked="" type="checkbox"/> Breaking and Entering	
<input checked="" type="checkbox"/> Murder	

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.

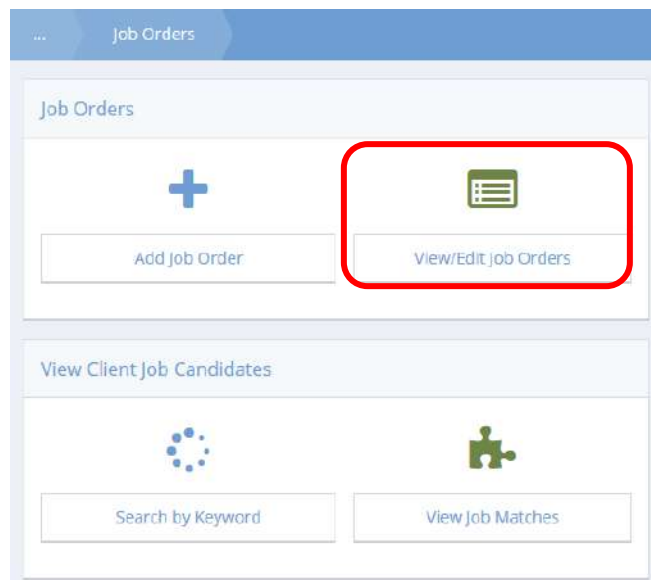


Status	Step Name	Completed By	Completed Date
✓	Job Opening (Add) (2)	Test: QA	5/5/2015
✓	Job Order Skills and Credentials (Edit)	Test: QA	5/5/2015
✓	Job Order Keywords Spreadsheet	Test: QA	5/5/2015
✓	Job Order Crimes (Spreadsheet)	Test: QA	5/5/2015

Click on the  Done button.




## View / Edit Job Orders




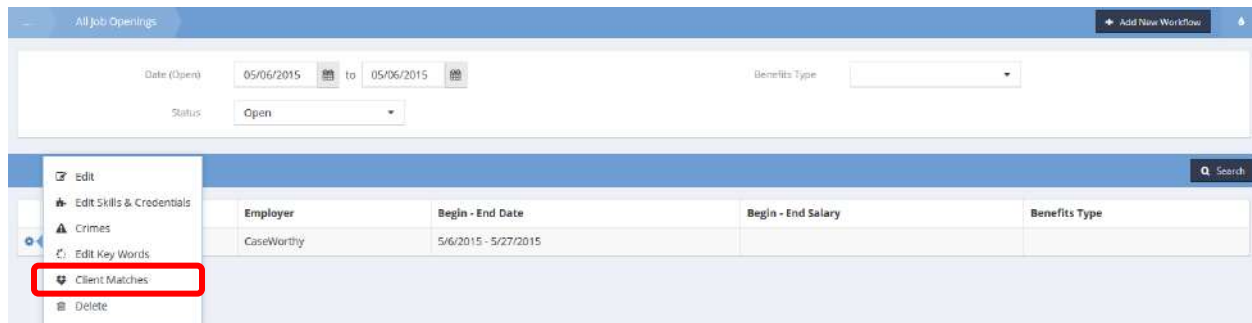
Click on the "View/Edit Job Orders" icon on the Job Orders menu. The All Job Openings form displays.

The screenshot shows the 'All Job Openings' form. It has a header bar with 'All Job Openings' and an 'Add New Workflow' button. Below the header are filter fields: 'Date (Open)' with a date range from 05/06/2015 to 05/06/2015, 'Benefits Type' with a dropdown menu, and 'Status' with a dropdown menu set to 'Open'. A 'Search' button is located on the right side of the filter section. Below the filters is a table with the following columns: 'Description', 'Employer', 'Begin - End Date', 'Begin - End Salary', and 'Benefits Type'.

If desired, filter the resultant list by entering a date range, status and benefits type. Click on the  Search button. The list, filtered to specifications, appears.

The screenshot shows the 'All Job Openings' form with the search results. The filter fields are the same as in the previous screenshot. The 'Search' button is highlighted with a red rectangle. Below the filters is a table with the following columns: 'Description', 'Employer', 'Begin - End Date', 'Begin - End Salary', and 'Benefits Type'. The table contains one row with the following data: 'job' (Description), 'CaseWorthy' (Employer), '5/6/2015 - 5/27/2015' (Begin - End Date), and empty cells for 'Begin - End Salary' and 'Benefits Type'.


Click on the action gear  icon associated with the desired job opening. Select Client Matches from the pop up menu that appears.






The screenshot shows the 'All Job Openings' interface. At the top, there are filters for 'Date (Open)' (05/06/2015 to 05/06/2015), 'Benefits Type', and 'Status' (Open). A search bar is on the right. A dropdown menu is open for the 'CaseWorthy' job opening, with 'Client Matches' highlighted. The table below has columns: Employer, Begin - End Date, Begin - End Salary, and Benefits Type.


The Job Match – Client List form appears.

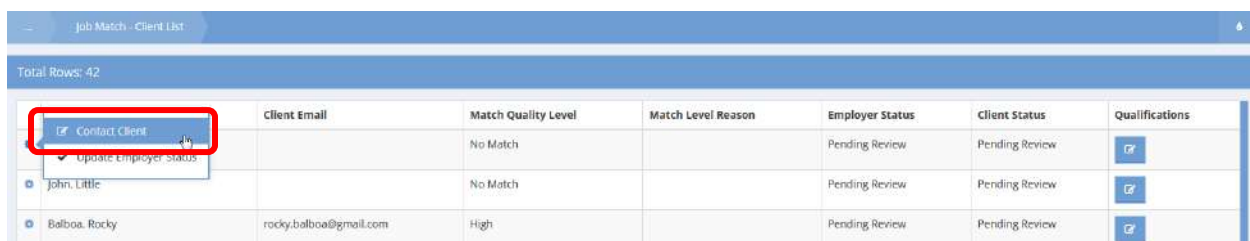
### Job Match - Client List






The screenshot shows the 'Job Match - Client List' form. It displays a table with 42 total rows. The table has columns: Client Name, Client Email, Match Quality Level, Match Level Reason, Employer Status, Client Status, and Qualifications. The first four rows are visible, showing clients like Johnson, Jimmy; John, Little; Balboa, Rocky; and Draper, Sally.


Client Name	Client Email	Match Quality Level	Match Level Reason	Employer Status	Client Status	Qualifications
Johnson, Jimmy		No Match		Pending Review	Pending Review	
John, Little		No Match		Pending Review	Pending Review	
Balboa, Rocky	rocky.balboa@gmail.com	High		Pending Review	Pending Review	
Draper, Sally		No Match		Pending Review	Pending Review	

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 screenshot shows the 'Job Match - Client List' form with the 'Contact Client' option highlighted in the dropdown menu for the first row.

Client Name	Client Email	Match Quality Level	Match Level Reason	Employer Status	Client Status	Qualifications
Johnson, Jimmy		No Match		Pending Review	Pending Review	
John, Little		No Match		Pending Review	Pending Review	
Balboa, Rocky	rocky.balboa@gmail.com	High		Pending Review	Pending Review	


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.

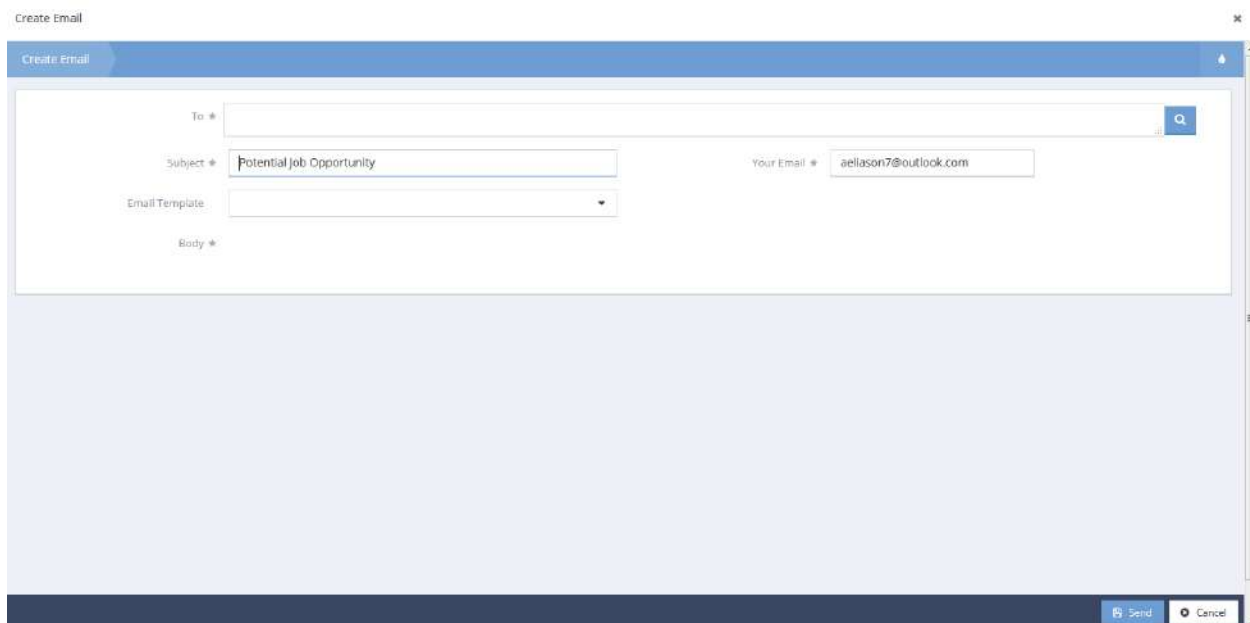
## Contact Client



The 'Contact Client' form is displayed within a blue header bar. It contains the following fields and buttons:


- Client Name:** A text input field containing 'Arden, Eldredge'.
- Home Phone:** An empty text input field.
- Cell Phone:** An empty text input field.
- Email:** An empty text input field.
- Create Email:** A blue button with a white envelope icon and the text 'Create Email'.

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  button.



The 'Create Email' form is displayed within a blue header bar. It contains the following fields and buttons:


- To:** An empty text input field with a search icon (magnifying glass) on the right.
- Subject:** A text input field containing 'Potential Job Opportunity'.
- Your Email:** A text input field containing 'aellason7@outlook.com'.
- Email Template:** A dropdown menu with a down arrow icon.
- Body:** A large, empty text area for composing the email body.
- Buttons:** At the bottom right, there are two buttons: 'Send' (blue with a white envelope icon) and 'Cancel' (grey).

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

Client Qualifications Summary		
Total Rows: 12		
Skill	Credential	Month Experience
Barista	Work Experience	12
Able to lift up to 40 lbs	License	0
Social Work	Bachelor's Degree	0

When finished viewing the qualifications, click on the  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.

All Job Openings

Add New Workflow

Date (Open)05/06/2015to05/06/2015

Benefits Type

StatusOpen

edit

Edit Skills & Credentials

Crimes

Edit Key Words

Client Matches

Delete

Employer

Begin - End Date

Begin - End Salary

Benefits Type

CaseWorthy	5/6/2015 - 5/27/2015		
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The Job Opening (Edit) form displays.

**Edit Job Order**

**Job Opening Information**

Employer \* CaseWorthy

Contact Person Hutchins, Roy

Order Date \* 05/06/2015

Status \* Open

# of Open Positions 0

Job Title job

Posting URL

Employer Website

Job Description

It's a job

Words: 3

Will Interview Yes

Posting Date Range

Begin Date \* 05/06/2015


End Date \* 05/27/2015


Position Information

Position Type Full Time

Pay Type Hourly

Save Cancel

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.

**All Job Openings**

Date (Open) 05/06/2015 to 05/06/2015

Status Open

Benefits Type

Search

Edit

Edit Skills & Credentials

Crimes

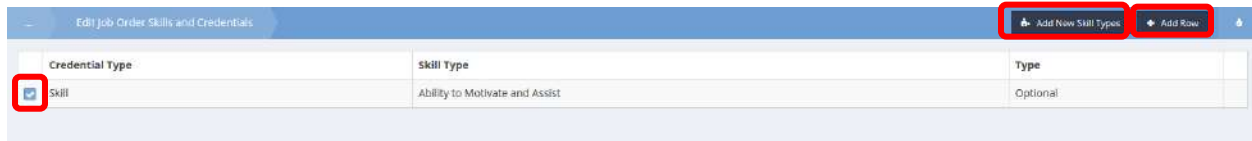
Edit Key Words

Client Matches

Delete


Employer	Begin - End Date	Begin - End Salary	Benefits Type
CaseWorthy	5/6/2015 - 5/27/2015		

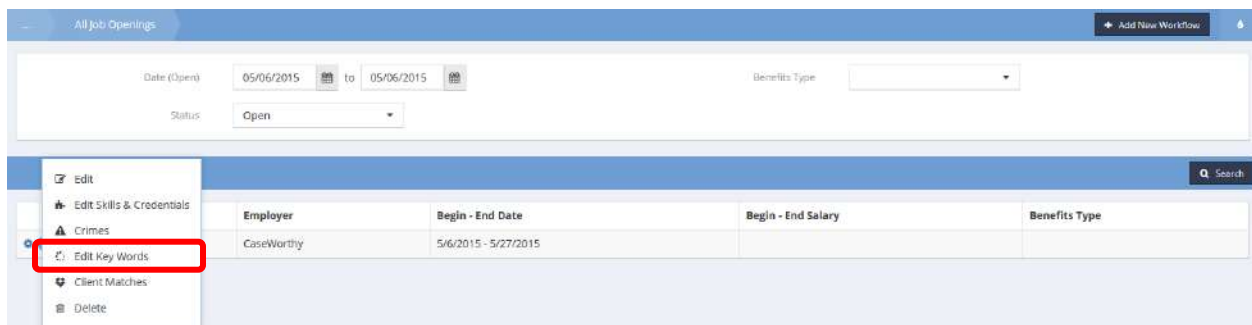
The Edit Job Order Skills and Credentials form displays.



Credential Type	Skill Type	Type
<input checked="" type="checkbox"/> Skill	Ability to Motivate and Assist	Optional

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.




Employer	Begin - End Date	Begin - End Salary	Benefits Type
CaseWorthy	5/6/2015 - 5/27/2015		

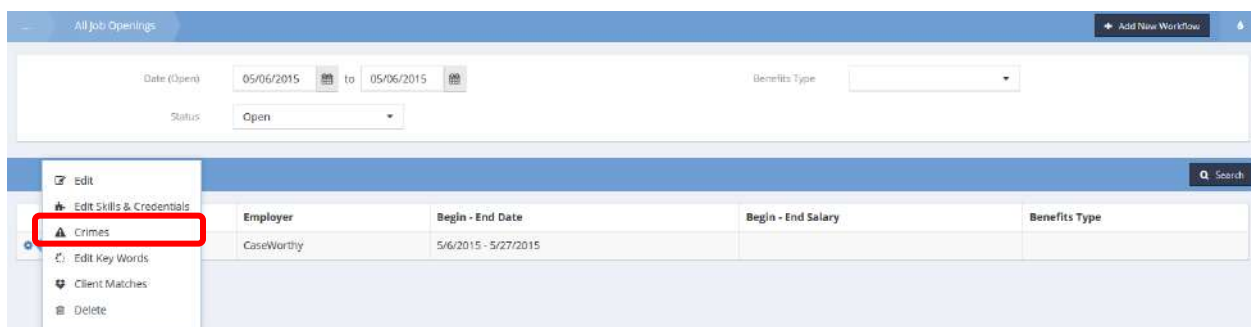
The Job Order Keywords Spreadsheet form displays a list of keywords for the job opening.



Keyword	Action
HTML	<input type="checkbox"/>
Security Clearance	<input checked="" type="checkbox"/>

Add a new keyword by clicking on the **+ Add Row** 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 **Save** 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.




Employer	Begin - End Date	Begin - End Salary	Benefits Type
CaseWorthy	5/6/2015 - 5/27/2015		

The Job Order Crimes (Summary) form displays.



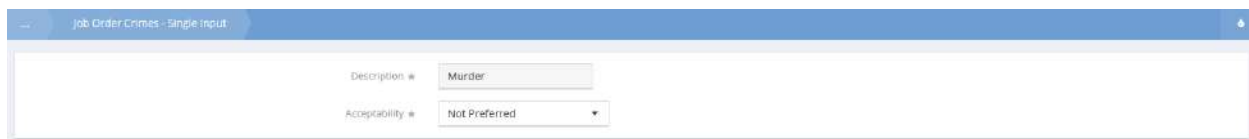
Description	Acceptability
Theft	Not Preferred
Murder	Not Preferred

Click on the action gear  icon for the desired crime and select Edit from the pop up menu that appears.



Description	Acceptability
Theft	Not Preferred
Murder	Not Preferred

The Job Order Crimes – Single Input form displays.



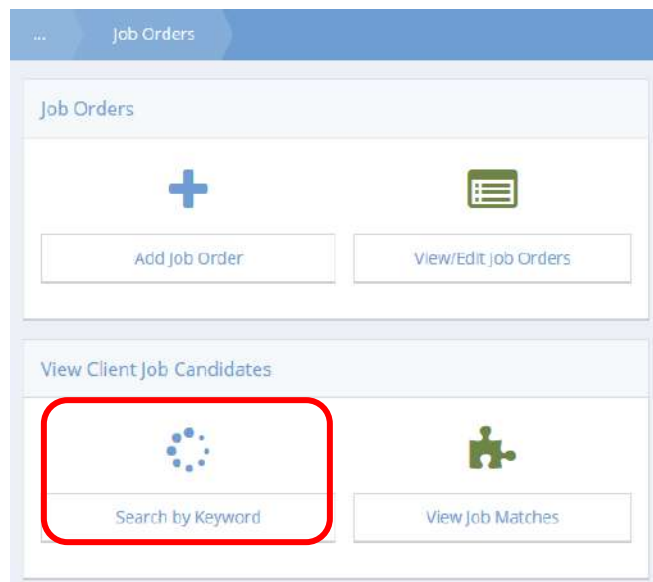
Description \*

Acceptability \*

Make any desired changes to the acceptability and click on the  button.

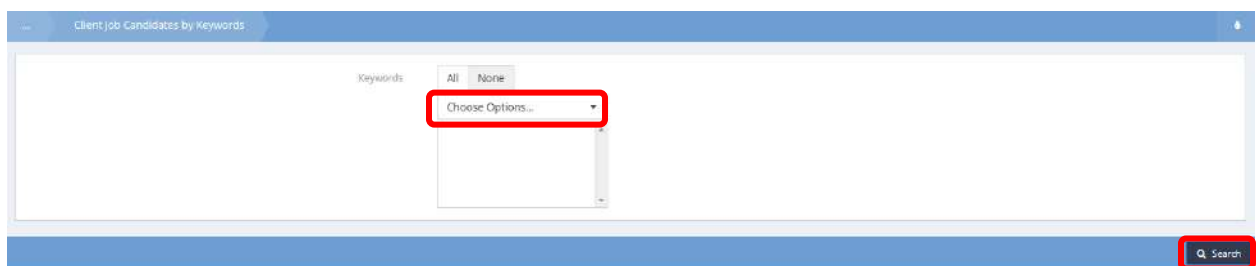



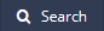
## Search by Keyword



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.

Client Job Candidates by Keywords

Keywords: All None

Choose Options...


Client Name	Keyword from Inventory	Custom Keyword
Arden, Eldredge		Jane1
Arden, Eldredge		Jane2
Arden, Eldredge		Jane3
Wrapp, Mitch	Twitter	


Click on the action gear  icon associated with the desired client and select Contact Client from the pop up menu that appears.

Client Job Candidates by Keywords

Keywords: All None

Choose Options...


Client Name	Keyword from Inventory	Custom Keyword
Arden, Eldredge		Jane1
 Contact Client		Jane2
Arden, Eldredge		Jane3
Wrapp, Mitch	Twitter	
Wrapp, Mitch		Go-Getter

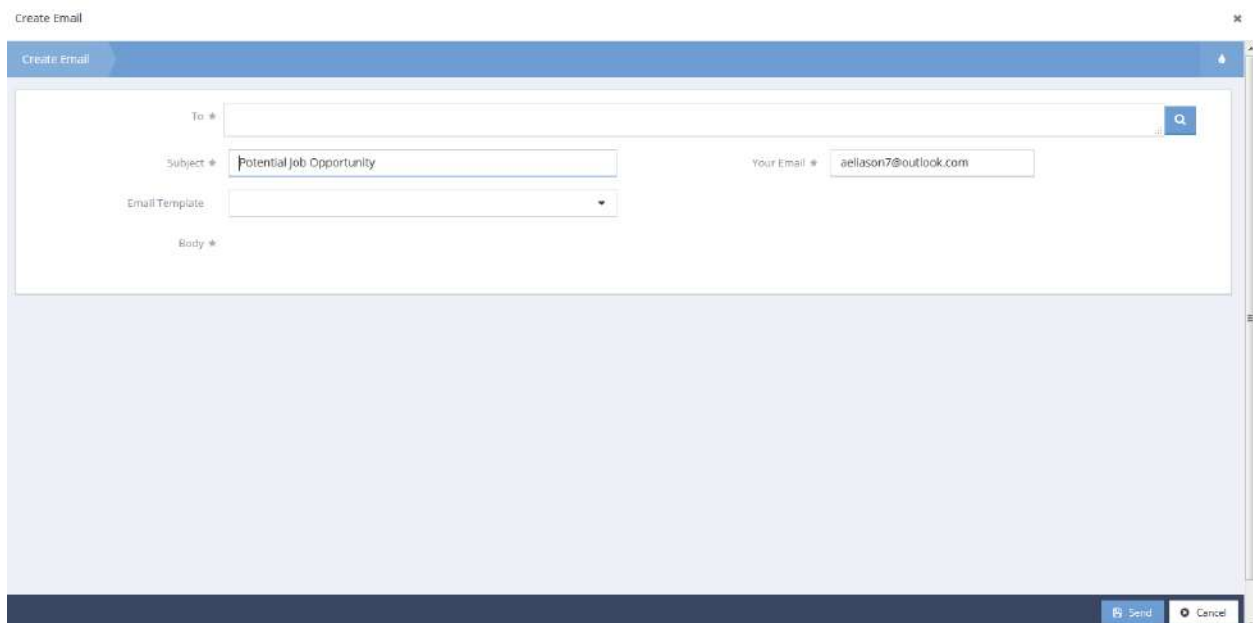
The Contact Client form displays. Utilize the contact information provided on the form to call or email the client. To email the client, click on the  Create Email button.

## Contact Client



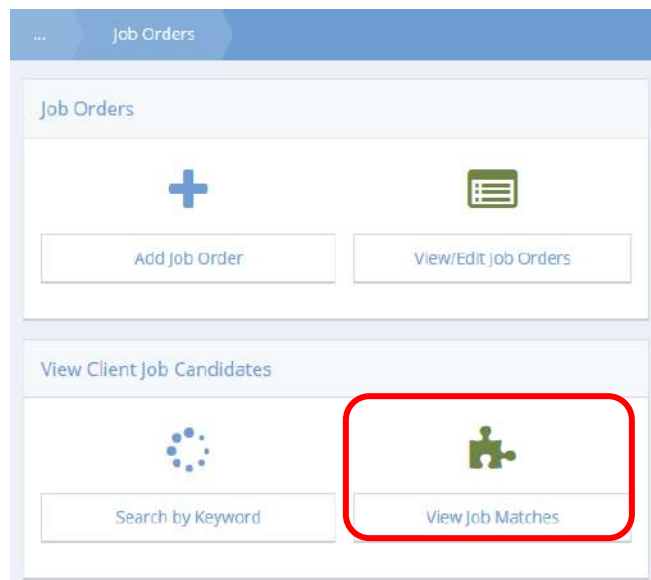
The 'Contact Client' form is a web-based interface for entering client information. It features a blue header bar with the title 'Contact Client' and a close button. The form area is white and contains several input fields: 'Client Name' (pre-filled with 'Arden, Eldredge'), 'Home Phone', 'Cell Phone', and 'Email'. A blue 'Create Email' button is positioned next to the 'Email' field.

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.



The 'Create Email' form is a web-based interface for composing an email. It features a blue header bar with the title 'Create Email' and a close button. The form area is white and contains several input fields: 'To' (with a search icon), 'Subject' (pre-filled with 'Potential Job Opportunity'), 'Email Template' (with a dropdown arrow), and 'Body'. A 'Your Email' field is pre-filled with 'aellason7@outlook.com'. At the bottom right, there are 'Send' and 'Cancel' buttons.

## 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.

... All Job Matches

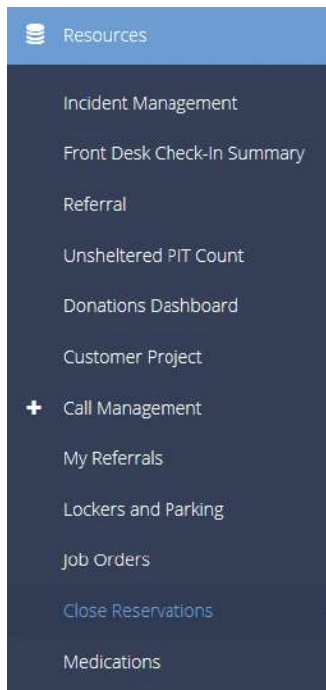
Employer:  Employer Status:

Client Name:  Client Status:

Total Rows: 255

Employer	Client Name	Match Quality Level	Employer Status	Client Email	Case Manager	Job Order ID	Client Status	View Job
Adrian's Bistro	Draper, Sally	High	Pending Review			141	Pending Review	
Apple Computers - Real	Allen, Rachel	Medium	Pending Review			140	Pending Review	
Apple Computers - Real	Unicorn, Rainbow	High	Pending Review			140	Job Offer Made - Accepted	
Adrian's Bistro	Johnson, Jimmy	High	Pending Review			139	Pending Review	
Adrian's Bistro	Balboa, Rocky	High	Pending Review	rocky.balboa@gmail.com		139	Pending Review	


## Close Reservations



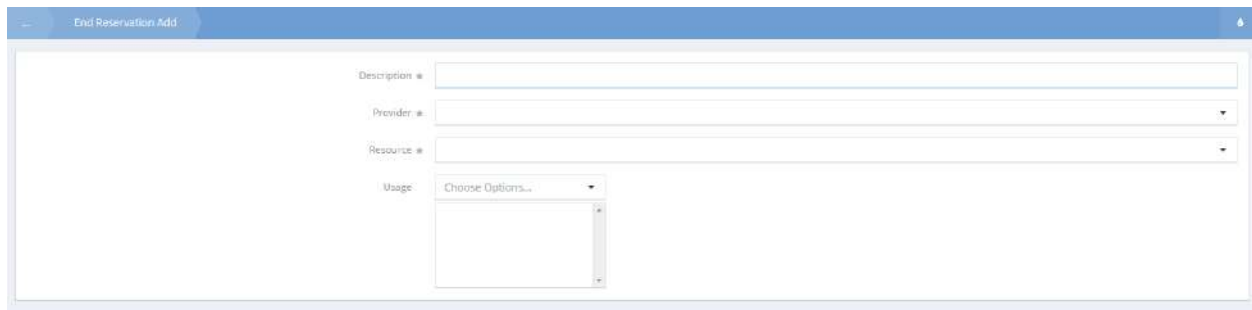
## End Reservations

**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	Test1	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



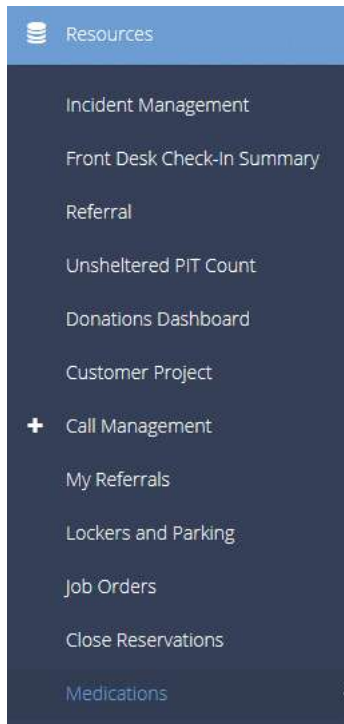
The screenshot shows a web application window titled "End Reservation Add". The form contains four fields: "Description" (a text input), "Provider" (a dropdown menu), "Resource" (a dropdown menu), and "Usage" (a dropdown menu with a "Choose Options..." button). The "Usage" dropdown is currently open, showing a list of options. A "Save" button is located at the bottom right of the form.

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 a calendar event and select Medication Administration from the pop up menu that appears.

The screenshot shows the 'Medication Administration Calendar' interface. At the top, there are filters for Location, Resource, and Usage. Below these is a search bar. The main area is a calendar for January 5th to 11th, 2015. A red box highlights a 'Medication Administration' event on Monday, 01/05/2015, at 7:00-8:00 AM. A mouse cursor is clicking on this event, and a small dropdown menu is visible with 'Medication Administration' selected.


The Medication Administration Signature form displays.

The screenshot shows the 'Medication Administration' signature form. It includes fields for Dispense Date (01/08/2015), Dispensing User (aellason), Client (magnifying glass icon highlighted), and Witness. There is also a shift dropdown set to 'Morning' and an 'Add Signature' button.

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.

The screenshot shows the 'Medication Administration' signature form with a table below it. The form includes fields for Dispense Date (12/26/2014), Dispensing User (aellason), Client (Text3, Matt), and Witness. The shift is set to 'Matt Test Administer'. The 'Add Signature' button is highlighted with a red box. Below the form is a table with columns: Dispense Date, Medication, Medication Given To Client \*, Prescribed Dosage, Dosage Administered \*, and Pending Refills. The table contains two rows: one for 'IB' with dosage 1, and one for 'Aspirin' with dosage 5.

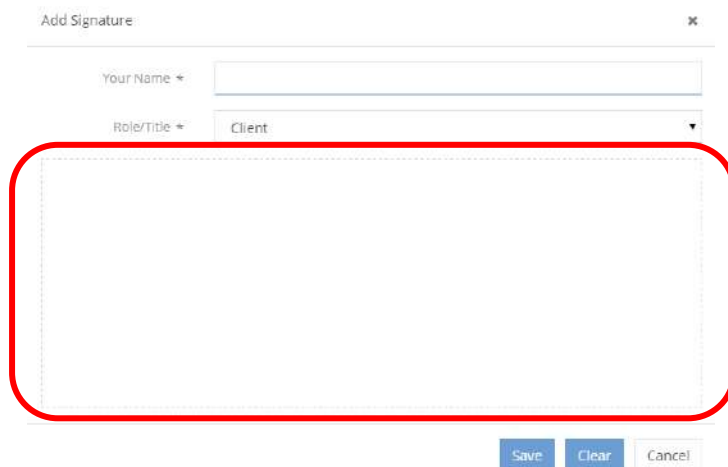
	Dispense Date	Medication	Medication Given To Client *	Prescribed Dosage	Dosage Administered *	Pending Refills
<input checked="" type="checkbox"/>		IB		1		
<input checked="" type="checkbox"/>		Aspirin		5		

Add a witness if necessary. To view medications the client has taken today, click the  button. The Medications Taken Today form displays.



The screenshot shows the 'Medications Taken Today' form. It has a blue header bar with a close button (X) on the right. Below the header is a table with the following columns: Medication, Discharge Date & Time, Shift, Administered, Dosage Quantity, Dosage Override Reason, and Reason Not Administered. The table body is currently empty.

Finally, click  to open the Add Signature window.



The screenshot shows the 'Add Signature' window. It has a title bar with the text 'Add Signature' and a close button (X). Inside the window, there are two input fields: 'Your Name' and 'Role/Title'. The 'Role/Title' dropdown menu is open, showing 'Client' as the selected option. A large, empty rectangular box with a dashed border is outlined in red, indicating the designated field for a signature. At the bottom of the window, there are three buttons: 'Save', 'Clear', and 'Cancel'.

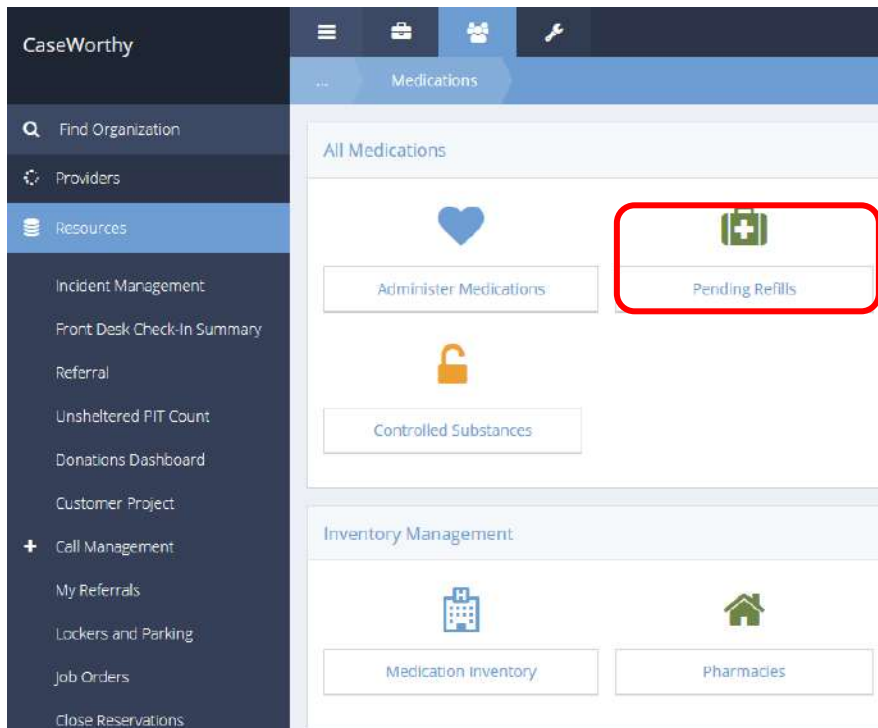
Enter a name, select a role or title from the dropdown box, and sign in the designated field.

Click on the  button.

Click on the  button.

## Pending Refills

**Objective:** View or edit pending medication refills.




Click the Pending Refills icon. The Medication Refills Needed form displays.

Medication Refills Needed

Pharmacy

Total Rows: 50

	Client ID	Client Last Name	Client First Name	Client SSN	Medication	Pharmacy	Rx Number	Quantity	Unit of Measure	Status	Refills Remaining	Refill Date
	8181	Draper	John		Propanolol	Walgreens Pharmacy	43143			Pending	0	10/10/2014
	8181	Draper	John		Lexapro (escitalopram oxalate)	Walgreens Pharmacy	11		Pill(s)	Pending	1	10/10/2014
	8181	Draper	John		Tums	Walgreens Pharmacy	654321		Pill(s)	Pending	0	10/10/2014
	4404	Draper	Sally	XXX-XX-9876	Oxycontin	Walgreens Pharmacy	654321		Pill(s)	Pending	2	10/10/2014
	4364	Jane107	Child	XXX-XX-5721	hijk	CVS	785		Pill(s)	Pending	0	10/10/2014
	2174	Jane1a	Test	XXX-XX-8888	Aspirin	Walgreens Pharmacy	789		Pill(s)	Pending	1	10/10/2014
	6686	Allen	Rainey	XXX-XX-1111	Aspirin	CVS	895		Pill(s)	Pending	1	10/15/2014
	1405	Cutler	Catt	XXX-XX-6789	IB	Walgreens Pharmacy		15	Pill(s)		0	10/20/2014
	7982	Arden	Cam	XXX-XX-4654	Tylenol	Walgreens Pharmacy	489		Pill(s)	Pending	3	11/11/2014
	8300	Little	Jenny		Tums	Walgreens Pharmacy	987654		Pill(s)	Pending	1	11/11/2014
	8299	Little	Stuart		Zoloft (sertraline)	CVS	123		Pill(s)	Pending	0	11/11/2014
	2119	Wrapp	Mitch	XXX-XX-1342	hijk	Walgreens Pharmacy	456789		Pill(s)	Pending	11	10/10/2014

Click the magnifying glass  icon to select the desired pharmacies.



Medication Refills Needed

Pharmacy

- ☒ CVS
- ☒ Optum Rx
- ☒ Walgreens Pharmacy

Total Rows: 32

[Add Selected](#) [Cancel](#) [Search](#)

	Client ID	Client Last Name	Client First Name	Client SSN	Medication	Pharmacy	Rx Number	Quantity	Unit of Measure	Status	Refills Remaining	Refill Date
	4404	Draper	Sally	XXX-XX-9876	Tylenol	Walgreens Pharmacy	987654		Pill(s)	Pending	2	10/10/2014
	8181	Draper	John		Propenolol	Walgreens Pharmacy	43143			Pending	0	10/10/2014

Click [Search](#) to filter results to the selected pharmacies.















Medication Refills Needed

Pharmacy


[Search](#) [X](#)

Total Rows: 32

[Search](#)



	Client ID	Client Last Name	Client First Name	Client SSN	Medication	Pharmacy	Rx Number	Quantity	Unit of Measure	Status	Refills Remaining	Refill Date
	<a href="#">+ Edit</a>		Sally	XXX-XX-9876	Tylenol	Walgreens Pharmacy	987654		Pill(s)	Pending	2	10/10/2014
	8181	Draper	John		Propenolol	Walgreens Pharmacy	43143			Pending	0	10/10/2014
	8181	Draper	John		Lexapro (escitalopram oxalate)	Walgreens Pharmacy	11		Pill(s)	Pending	1	10/10/2014
	8181	Draper	John		Turns	Walgreens Pharmacy	654321		Pill(s)	Pending	0	10/10/2014
	4404	Draper	Sally	XXX-XX-9876	Oxycontin	Walgreens Pharmacy	654321		Pill(s)	Pending	2	10/10/2014
	4364	Jane107	Child	XXX-XX-5721	hijk	CVS	785		Pill(s)	Pending	0	10/10/2014
	2174	Jane1a	Test	XXX-XX-8888	Aspirin	Walgreens Pharmacy	789		Pill(s)	Pending	1	10/10/2014
	6686	Allen	Rainey	XXX-XX-1111	Aspirin	CVS	895		Pill(s)	Pending	1	10/15/2014
	1405	Cutler	Catt	XXX-XX-6789	IB	Walgreens Pharmacy		15	Pill(s)		0	10/20/2014
	7982	Arden	Cam	XXX-XX-4654	Tylenol	Walgreens Pharmacy	489		Pill(s)	Pending	3	11/11/2014
	8300	Little	Jenny		Turns	Walgreens Pharmacy	987654		Pill(s)	Pending	1	11/11/2014
	8299	Little	Stuart		Zoloft (sertraline)	CVS	123		Pill(s)	Pending	0	11/11/2014
	2119	Wrapp	Mitch	XXX-XX-1342	hijk	Walgreens Pharmacy	456789		Pill(s)	Pending	11	10/10/2014
	1421	Arden	Eldredge	XXX-XX-6546	Excedrin	Walgreens Pharmacy			Pill(s)	Pending	0	10/15/2014

[Done](#)

Click the action gear  and click Edit to edit any refills.

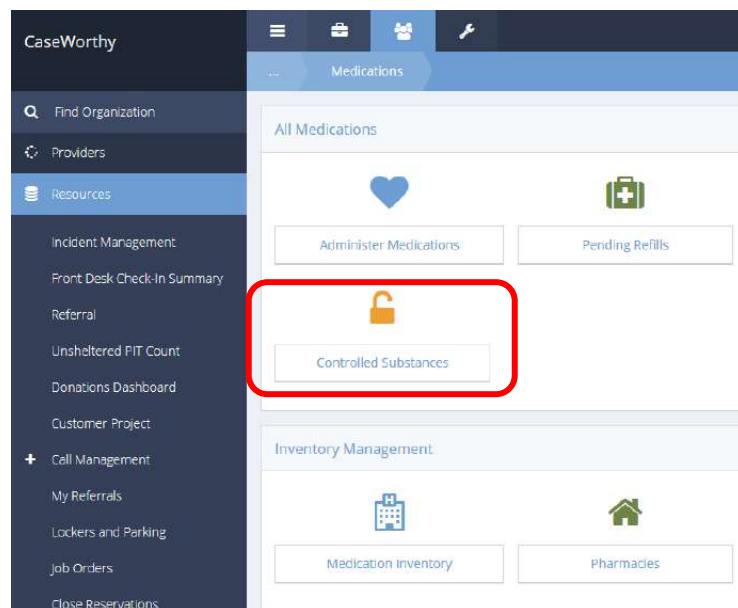
The Medication Refill not complete Edit form displays.

The screenshot shows the 'Medication Refill Edit' form. The form is divided into two main sections. The top section contains several input fields: 'Quantity per Refill' (60), 'Original Number of Refills' (3), 'This Refill Quantity Remaining' (60), 'Unit Of Measure' (Pill(s)), 'Dosage Quantity' (2), 'Dispense Schedule' (Choose Options...), 'Refill Pharmacy' (Walgreens Pharmacy), and 'Refill Status' (Pending). The bottom section is titled 'Change Reason' and contains an 'Edit Reason' field, which is highlighted with a red rectangle. At the bottom right of the form, there are 'Save' and 'Cancel' buttons.

Change any necessary info and enter a reason for the edit. Click  Save and then click  Done 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.

Controlled Substance Summary										
Prescription Status <span>▼</span>										
Total Rows: 34										
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	Flora		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	Prostatatine	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.

Controlled Substance Summary

Prescription Status 


☐ Nothing  
☐ Active  
☐ Closed and pills retained in system

Total Rows: 34

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 Pills(s)			1
1423	Arden	Erwin		Seroquel (quetiapine)	Active	Walgreens Pharmacy	5,0000 Pills(s)			0
1961	Brian	TestElliot	XXX-XX-5465	Lexapro (escitalopram oxalate)	Active	Walgreens Pharmacy	5,0000 Pills(s)			0


Select the desired status and the results filter.

Controlled Substance Summary

Prescription Status 

Total Rows: 34

	First Name	SSN	Medication	Prescription Status	Pharmacy	Total Quantity	Refill Action Date	Case Note	Refills Remaining
<input checked="" type="checkbox"/> Refills	Catt	XXX-XX-6789	Seroquel (quetiapine)	Active	Walgreens Pharmacy	60,0000 Pills(s)			1
<input type="checkbox"/> Close Prescription	Erwin		Seroquel (quetiapine)	Active	Walgreens Pharmacy	5,0000 Pills(s)			0
	Brian	TestElliot	XXX-XX-5465	Lexapro (escitalopram oxalate)	Active	Walgreens Pharmacy	5,0000 Pills(s)		0
	Wrapp	Mitch	XXX-XX-1342	Oxycontin	Active	Walgreens Pharmacy	30,0000 Pills(s)		4
	Grace	Fiona		Oxycontin	Active	Walgreens Pharmacy	30,0000 Pills(s)		0
	Draper	JOhn		Lexapro (escitalopram oxalate)	Active	Walgreens Pharmacy	1,0000 Pills(s)		1
	Draper	Sally	XXX-XX-9876	Oxycontin	Active	Walgreens Pharmacy	90,0000 Pills(s)		2
	Man	Bar	XXX-XX-8582	Seroquel (quetiapine)	Active	Walgreens Pharmacy	20,0000 Pills(s)		1
	test	meg	XXX-XX-2321	Oxycontin	Active	Walgreens Pharmacy	70,0000 Pills(s)		3
	test101	test101		Propanolol	Active	Walgreens Pharmacy	30,0000 Pills(s)		11
	Little	Stuart		Zoloft (sertraline)	Active	CVS	15,0000 Pills(s)		0
	Arden	Eldredge	XXX-XX-6546	Zoloft (sertraline)	Active	Walgreens Pharmacy	60,0000 Pills(s)		14

To close a prescription, click Close Prescription. To manage refills, click the action gear  and then click Refills. The Refill form displays.

Refill

Medication	Refill Status	Dosage Quantity	Refill Qty Remaining	Refill Date	Refill ID
Seroquel (quetiapine)	Complete	1	53	10/20/2014	49

Refill

Medication	Refill Status	Dosage Quantity	Refill Qty Remaining	Refill Action Date	Refill ID
 Edit	Complete	1	51		49



Click the action gear  and Edit to edit refills.

The Medication Refill not complete Edit form displays.

The screenshot shows the 'Medication Refill Edit' form. It includes the following fields and options:

- Quantity per Refill: 60
- Original Number of Refills: 2
- This Refill Quantity Remaining: 60
- Unit Of Measure: Pills
- Dosage Quantity: 1
- Dispense Schedule: Choose Options... (Morning, Midday, Evening)
- Refill Pharmacy: Walgreens Pharmacy
- Refill Status: Complete
- Change Reason: Edit Reason (highlighted with a red box)

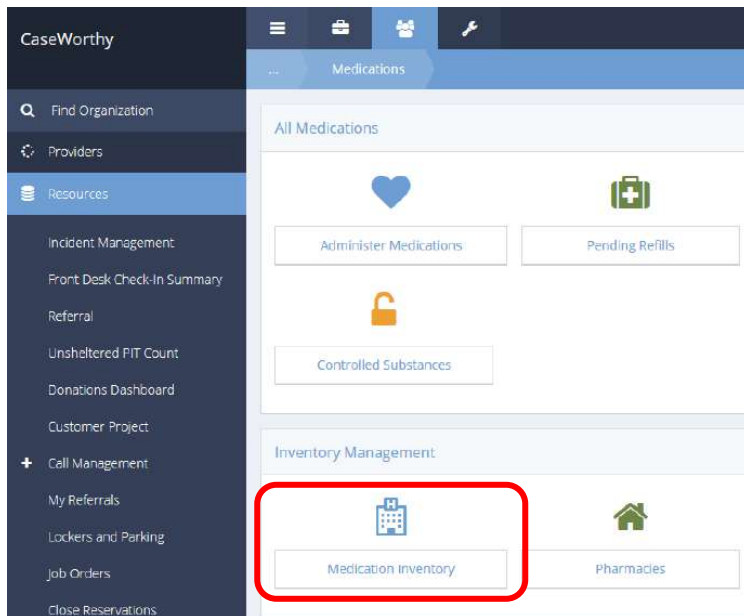
At the bottom right, there are 'Save' and 'Cancel' buttons.

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.

Medication Inventory

Add Now

Description  + Category

Search

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		
hijk	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
Proxostatine	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		
Test	Thyroid	No	Brand Name	No	Yes	No
Trifexis	Antibiotic	No	Brand Name	No	No	No
Test	Thyroid	No	Brand Name	No	Yes	No

Save Cancel

Click on the Category dropdown box to filter to a specific category.

The screenshot shows the 'Medication Inventory' form. At the top, there is a blue header bar with a minus icon, the text 'Medication Inventory', and a red 'Add New' button. Below the header, there is a search bar with a red box around the 'Description' field and a plus icon. To the right of the search bar is a 'Category' dropdown menu, which is open, showing a list of categories: '-Nothing-', 'Alzheimer's & Parkinson's', 'Allergies & Asthma', 'Anti-Depressants', 'Anti-Epileptics', 'Antibiotic', 'Anti-Psychotics', and 'Anxiety'. A red box is around the 'Search' button. Below the search bar is a table with columns: 'Description', 'Category', 'Refrigerated', 'Medication Type', 'Critical', and 'Liquid'. The table contains several rows of medication data, including Aspirin, Cymbalta, Excedrin, hylk, IB, and Lexapro.

Enter a description and click **Search** to display existing medications. Click **Add New** to add a new medication. The Edit Medication Inventory form displays.


The screenshot shows the 'Edit Medication Inventory' form. It has a blue header bar with a minus icon, the text 'Medication Inventory', and a red 'Add New' button. Below the header, there is a search bar with a red box around the 'Description' field and a plus icon. To the right of the search bar is a 'Category' dropdown menu. Below the search bar is a table with columns: 'Description', 'Category', 'Refrigerated', 'Medication Type', 'Controlled Substance', 'Critical', and 'Liquid'. The table contains several rows of medication data, including Aspirin, Cymbalta, Excedrin, hylk, IB, and Lexapro.

Fill out all the necessary fields and click **Save** when finished. The Medication Inventory form displays.

The screenshot shows the 'Medication Inventory' form. At the top, there is a blue header bar with a minus icon, the text 'Medication Inventory', and a red 'Add New' button. Below the header, there is a search bar with a red box around the 'Description' field and a plus icon. To the right of the search bar is a 'Category' dropdown menu. Below the search bar is a table with columns: 'Description', 'Category', 'Refrigerated', 'Medication Type', 'Controlled Substance', 'Critical', and 'Liquid'. The table contains several rows of medication data, including Aspirin, Cymbalta, Excedrin, hylk, IB, and Lexapro. A red box is around the 'Edit' button in the first row of the table.

Click the action gear  and click Edit to edit an existing medication.

The Edit Medication Inventory form displays.

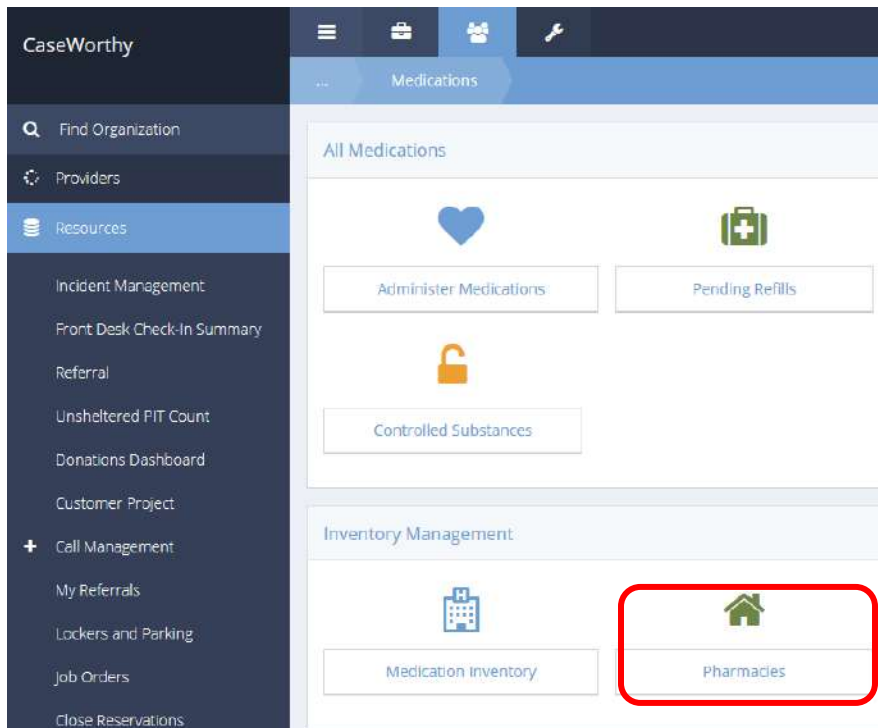
Make any necessary changes and click  Save when finished. The Medication Inventory form displays.

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		
hijk	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		
Propranolol	Heart & Circulatory System	No	Generic	Yes	Yes	No
Provastatin	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.

The screenshot shows the 'Pharmacies' form. At the top, there is a 'Provider Name' field and a '+' button. Below this, there is a 'Total Rows: 3' indicator and a 'Search' button. The table below lists the providers:

Provider	Address, City, State & Zip	Phone	System ID
CVS			8255
Optum Rx	100 East Main Street Avondale, AZ, 85323		8548
Walgreens Pharmacy	123 Main Street, 123 Main Street, TX, Austin 78704, TX, 78704	555-555-5555	8170

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.

Pharmacies

Provider Name and Category

Provider Name \*

Categories \*

Choose Options...

Pharmacy

Provider Location

Address \*

Address 2 \*

Zip Code \*

City \*

County \*

Latitude \*

Longitude \*

State \*

Neighborhood \*

Verify Address

Please enter additional provider contact information below.


Phone \*

Email \*

Fax \*

Website URL \*

Save Cancel

Fill out all required info and click  Save when finished. The Pharmacies Providers form displays.

Pharmacies

+ Add New

Provider Name

Total Rows: 3

Search

Provider	Address, City, State & Zip	Phone	System ID
 Edit			8255
 Optum Rx	100 East Main Street Avondale, AZ, 85323		8548
 Walgreens Pharmacy	123 Main Street 123 Main Street, TX, Austin 78704, TX, 78704	555-555-5555	8170

To edit an existing provider, click the action gear  next to the provider name and click Edit.

The Edit Provider form displays.

The screenshot shows the 'Edit Provider' form with the following details:

- Provider Name and Category:**
  - Provider Name: CVS
  - Categories: Choose Options... (dropdown menu showing Pharmacy)
  - Make Default Provider: ☐
  - Master Provider:
- Provider Location:**
  - Address:
  - Address 2:
  - Zip Code:
  - City, State:
  - County/Neighborhood:
  - Latitude / Longitude: 0 / 0
  - Text County / Neighborhood: County: Neighborhood: Latitude: 0 Longitude: 0
  -
- Please enter additional provider contact information below:**
  - Phone:
  - Fax:
  - Email:  0.00
  - Website URL:
  - Default AMI: Federal United States - 2011
  - Default AMI Metro: ☐

At the bottom right, there are  and .


Make any necessary changes and click  when finished.

Click  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  button.



The screenshot shows the 'Resource Absence Management' interface. At the top, there are four filter dropdowns: Status, Scheduler, Program Staff, and Supervisor. A red box highlights these filters. Below the filters, it says 'Total Rows: 42'. To the right of this, there is a 'Search' button with a magnifying glass icon, also highlighted with a red box. Below the search bar is a table with the following columns: Begin Date, End Date, Client, Reason, Absence Type, Status, and AbsenceID. The table contains three rows of data.


Begin Date	End Date	Client	Reason	Absence Type	Status	AbsenceID
7/1/2015 9:22 AM	7/3/2015 12:00 AM	Cliente, Nuevo	Forgot/Overslept	Work / Shift Release	Pending	308
6/9/2015 7:58 AM	6/9/2015 11:00 AM	Test, Jane683	Lacked Docs for Appt/No c/o	Work / Shift Release	Pending	306
6/8/2015 7:55 AM	6/8/2015 11:00 AM	Test, Jane683	Missed on no intake Clerk	Long Term Leave	Pending	305

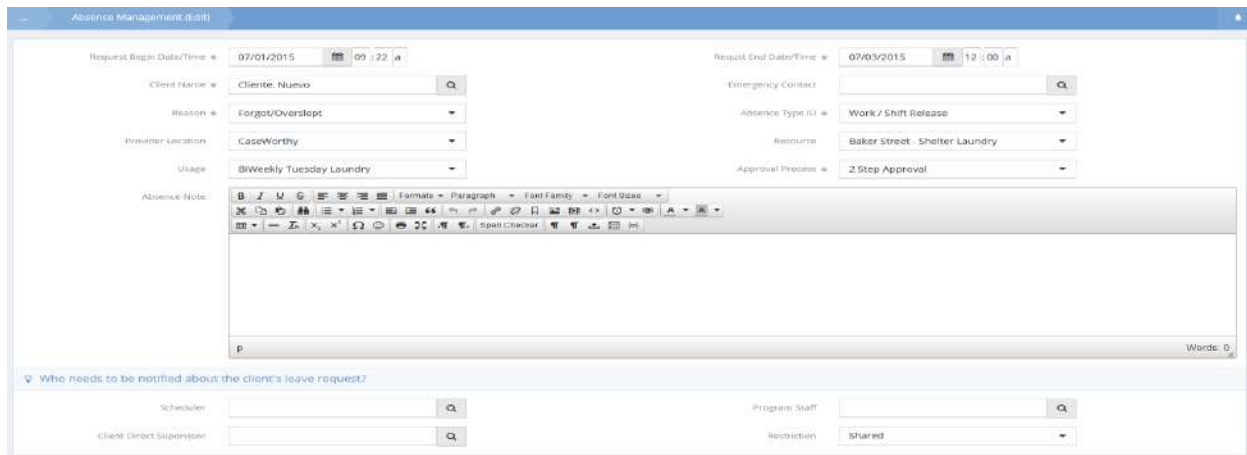
To edit an excused absence, click its action gear  icon and select Edit.



This screenshot shows the same interface as the previous one, but with the 'Edit' button highlighted for the first row of the table. The 'Edit' button is a blue square with a white gear icon and the word 'Edit' in white text. A red box highlights the 'Edit' button. The 'Delete' button is also visible below it.

Begin Date	End Date	Client	Reason	Absence Type	Status	AbsenceID
7/1/2015 9:22 AM	7/3/2015 12:00 AM	Cliente, Nuevo	Forgot/Overslept	Work / Shift Release	Pending	308
6/9/2015 7:58 AM	6/9/2015 11:00 AM	Test, Jane683	Lacked Docs for Appt/No c/o	Work / Shift Release	Pending	306

The Absence Management (Edit) form displays. Make any desired changes and click  when finished.



Request Begin Date/Time: 07/01/2015 09:22 a

Request End Date/Time: 07/03/2015 12:00 a

Client Name: Client: Nuevo

Reason: Forgot/Oversept

Provider Location: CaseWorthy

Usage: BiWeekly Tuesday Laundry

Emergency Contact:

Absence Type: Work / Shift Release

Resource: Baker Street - Shelter Laundry

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

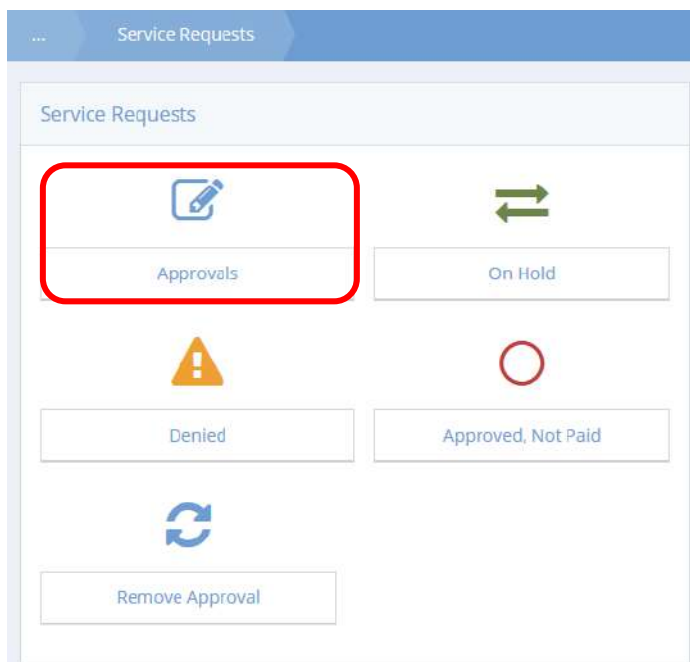


## Approvals

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.

Service Request Approvals


Service requests for approval.

Approval Step \*Single Approval

Status \*Pending Approval

Total Rows: 46

Referral Type	Client	Date	Shut-Off Date	Service	Amount	Referral ID
<input checked="" type="checkbox"/> Service Request	Balboa, Rocky	3/17/2015		Food bank/home delivered meals	\$1.00	2886
<input checked="" type="checkbox"/> Service Request	Cordero, Raul	1/8/2015		AA Meeting	\$120.00	2858
<input checked="" type="checkbox"/> Service Request	test, Jane151			Education	\$10.00	2857
<input checked="" type="checkbox"/> Service Request	Test, Jane530	1/6/2015		AA Meeting	\$11.12	2853
<input checked="" type="checkbox"/> Service Request	Wrapp, Mitch	1/5/2015		Alcohol Counseling	\$250.00	2852
<input checked="" type="checkbox"/> Provider Service Request (Invoices against contr	Barnes, Charles	12/26/2014		Carpet	\$25.00	2846
<input checked="" type="checkbox"/> Service Request	Wrapp, Mitch	12/3/2014		AA Meeting	\$800.00	2810
<input checked="" type="checkbox"/> Service Request	Wrapp, Mitch	12/3/2014		Alcohol Counseling	\$450.00	2809
<input checked="" type="checkbox"/> Service Request	Multiple, Mary	6/23/2014		Rental Assistance	\$10.00	1630

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.

Service Request Approvals

Total Rows: 46 Search

Referral Type	Client	Date	Shut-Off Date	Service	Amount	Referral ID
<input checked="" type="checkbox"/> Service Request	Balboa, Rocky	3/17/2015		Food bank/home delivered meals	\$1.00	2886
<input checked="" type="checkbox"/> Service Request	Cordero, Raul	1/8/2015		AA Meeting	\$120.00	2858
<input checked="" type="checkbox"/> Service Request	test, Jane151	01/07/2015		Education	10.00	2857

Provider: CaseWorthy

Approve ☒ Place Hold ☐ Deny ☐

[Change Acct/Amnt](#)
[Files](#)
[Enrollment](#)
[Financials](#)

[Case Note](#)

Amount Obligated:

Number: 587 Reference Date: 01/07/2015

Payee: India Payee Provider

Address:  Address2:

City:  State:

The service also shows up under the client's service list.

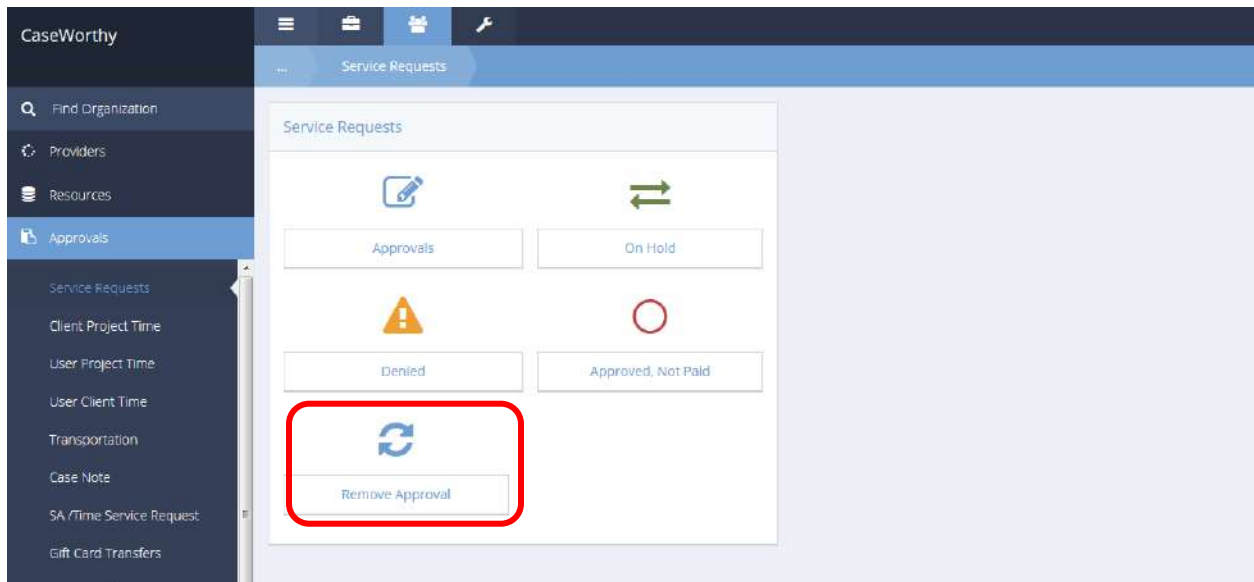
Steve Bosell Adrian Blanton JR. Tutor

Services Summary Add New

Date	Program	Service	Unit Of Measure	Units	Unit Value	Total	Service ID
3/26/2015	Adult Education	Transportation	Each	1.00	77.00	77.00	1213884
3/20/2015	CC Adoption	Home Study	Each	1.00	1.00	1.00	1213732
3/19/2015	CC Housing	Building Material	Each	1.00	1.00	1.00	1213769
3/19/2015	CC Housing	Case Management	Hours	1.00	1.00	1.00	1213704

## Remove Approval

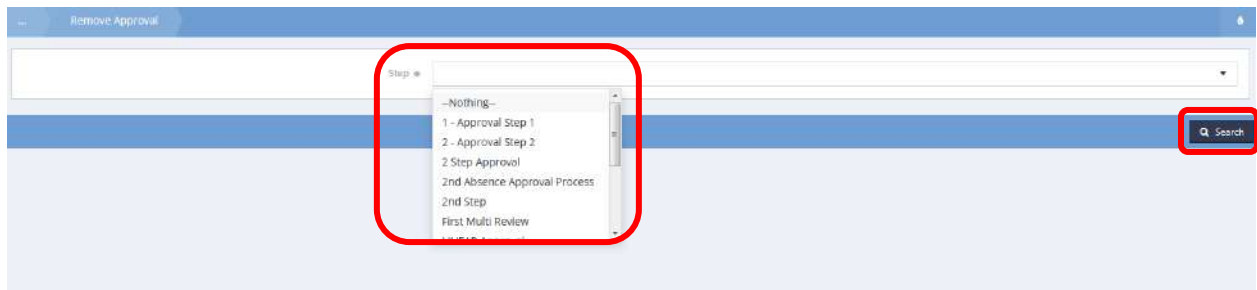
**Objective:** Undo an approval.




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.



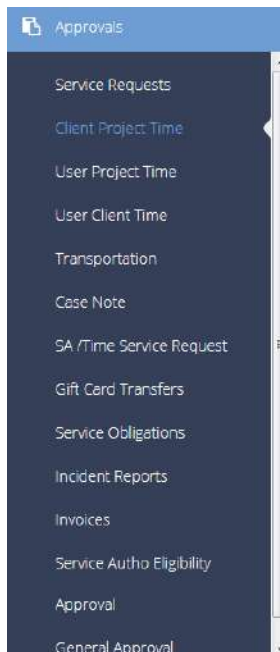
Click on the  Search button. A list of approved service requests displays.

Remove Approval						
Step ▼ First Multi Review						
Total Rows: 2 						
Referral Date	Client	Account Name	Reference Number	Service	Amount	
6/24/2013	Davis, Robbie	CCSC Account		5555 Utility Assistance	\$25.00	
1/6/2015	Test, Jane530	_Gas Account		215 Utility Assistance	\$11.13	

Click on the action gear  icon associated with the desired service request and select Undo Approval.

Remove Approval						
Step ▼ First Multi Review						
Total Rows: 2 						
 Undo Approval	Davis, Robbie	CCSC Account		5555 Utility Assistance	\$25.00	
1/6/2015	Test, Jane530	_Gas Account		215 Utility Assistance	\$11.13	

## Client Project Time



Use this area to approve client project time. The functionality works the same as in [Service Request Approvals](#) outlined above

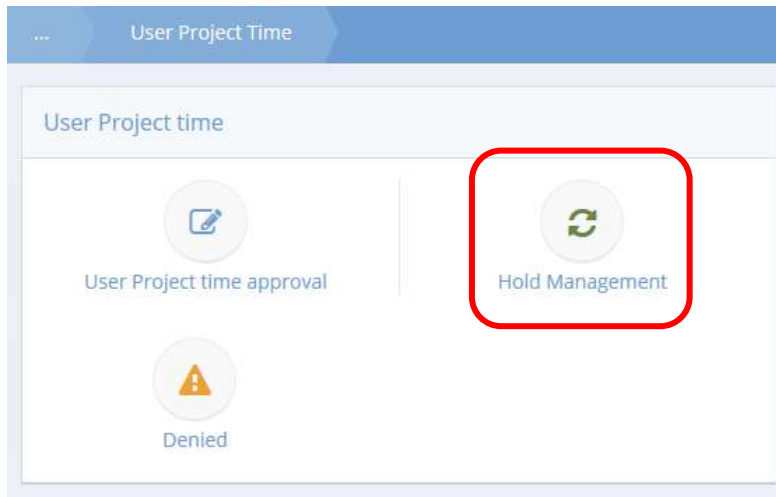
A screenshot of the 'Project Time Approval with Project' form in the CaseWorthy application. The form has a blue header bar with the title 'Project Time Approval with Project'. Below the header, there are several input fields: 'Step #' (a dropdown menu), 'Status #' (a dropdown menu with 'Pending' selected), 'Customer' (a dropdown menu), 'Project' (a dropdown menu), 'Client Name' (a text input field with a search icon), and 'Project Transaction Date' (two date input fields with a calendar icon and a 'to' label). At the bottom right, there is a 'Search' button with a magnifying glass icon.

## User Project Time

### *User Project Time Hold*

**Objective:** View and release holds for user project time.

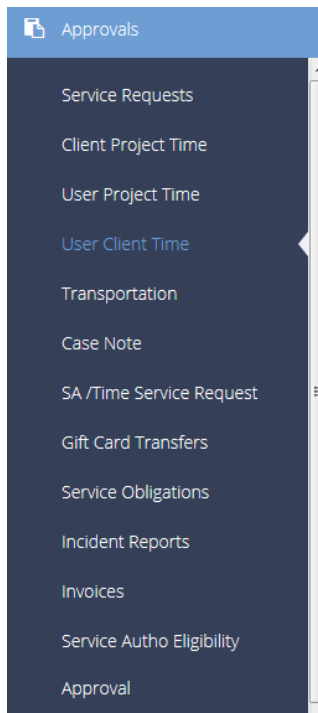
**Navigation:** Organization>Approvals>User Project Time



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

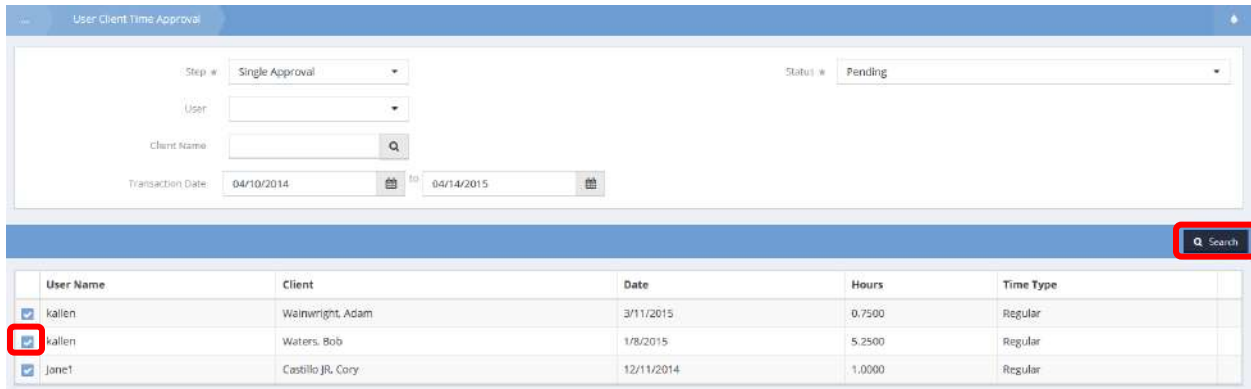


## User Client Time Approval


**Objective:** Approve client time.

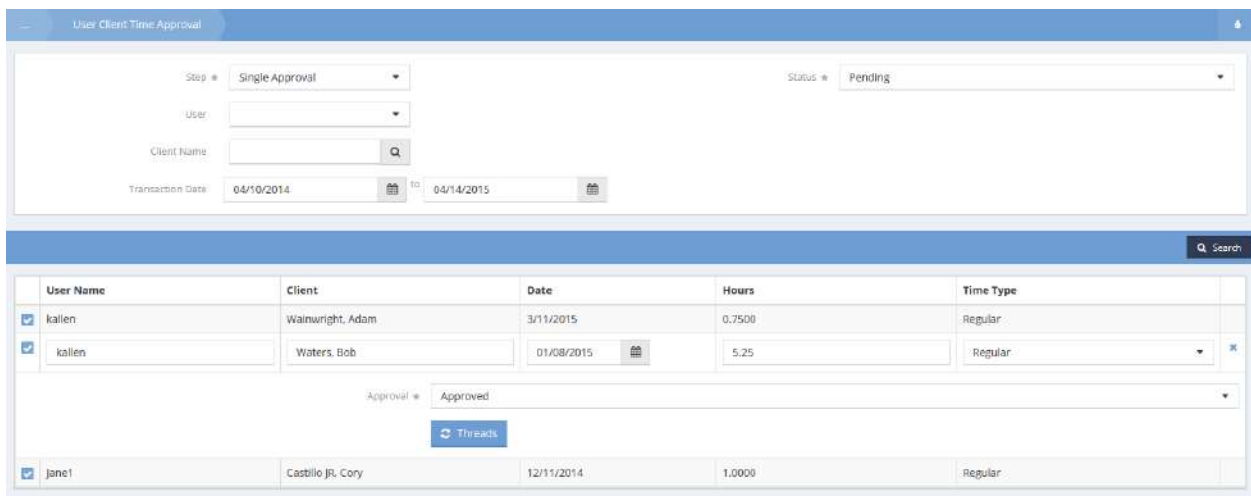
A screenshot of the 'User Client Time Approval' form. The form has a blue header bar with the title 'User Client Time Approval' and a user icon. Below the header, there are several input fields: 'Step' (a dropdown menu), 'User' (a dropdown menu), 'Client Name' (a text field with a search icon), 'Status' (a dropdown menu showing 'Pending'), 'Transaction Date' (a date field showing '04/14/2015' with a calendar icon), and 'ID' (a text field showing '04/14/2015' with a calendar icon). At the bottom right, there is a 'Search' button with a magnifying glass icon.

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  button.




User Name	Client	Date	Hours	Time Type
<input checked="" type="checkbox"/> kallen	Wainwright, Adam	3/11/2015	0.7500	Regular
<input checked="" type="checkbox"/> kallen	Waters, Bob	1/8/2015	5.2500	Regular
<input checked="" type="checkbox"/> Jane1	Castillo JR, Cory	12/11/2014	1.0000	Regular

To approve client time, click on the desired blue  checkbox. The row expands with the approval defaulted to approved.



User Name	Client	Date	Hours	Time Type
<input checked="" type="checkbox"/> kallen	Wainwright, Adam	3/11/2015	0.7500	Regular
<input checked="" type="checkbox"/> kallen	Waters, Bob	01/08/2015	5.25	Regular
Approval: Approved				
<a href="#">Threads</a>				
<input checked="" type="checkbox"/> Jane1	Castillo JR, Cory	12/11/2014	1.0000	Regular

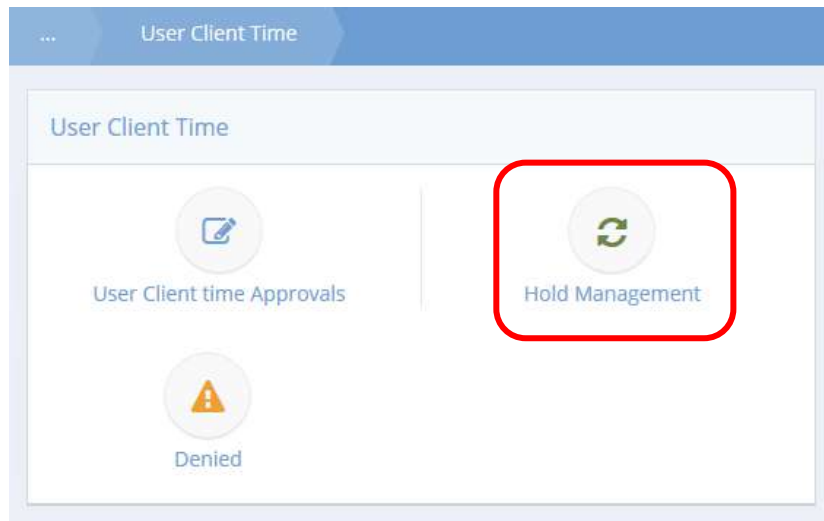
Make any desired changes and click on the  button.



## User Client Time Hold

**Objective:** View and release user client time holds.

**Navigation:** Organization>Approvals>User Client Time

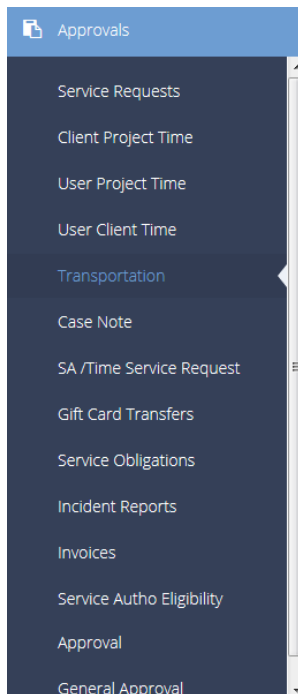



Click the icon for Hold Management. The User Client Time Hold form displays.

A screenshot of the 'User Client Time Hold' form. The form has a blue header bar with the text 'User Client Time Hold'. Below the header, there is a white box containing several search filters. On the left, there are three dropdown menus labeled 'Step', 'User', and 'Client Name'. On the right, there is a dropdown menu labeled 'Status' with the value 'Hold' selected. Below these, there is a 'Transaction Date' field with two date pickers: '09/22/2015' and '09/22/2015', with the word 'through' in between. At the bottom right of the form, there is a blue button with a magnifying glass icon and the text 'Search'.

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  Search button. Pending requests display.

Approve Transportation Request

Step


Single Approval

Status

Pending

Search

Request Date	Transportation Date	Client	Request Reason	# of Passengers	View Trans. Request	View Discussion Threads
<div><div></div>1/7/2013 6:00 PM</div>	3/13/2013	Beckster, Camrooon	Household	1	<div><div></div></div>	<div><div></div></div>
<div><div></div>3/6/2013 6:00 PM</div>	3/13/2013	Beckster, Camrooon	Household	5	<div><div></div></div>	<div><div></div></div>
<div><div></div>2/28/2013 6:00 PM</div>	3/13/2013	Adon, James	Court Appearance	1	<div><div></div></div>	<div><div></div></div>

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 screenshot shows the 'Approve Transportation Request' interface. At the top, there are filters for 'Step' (Single Approval) and 'Status' (Pending). Below is a table with columns: Request Date, Transportation Date, Client, Request Reason, # of Passengers, View Trans. Request, and View Discussion Threads. The table contains three rows of data. The first row is for a request on 03/08/2013 at 06:00 p, for client Beckster, Cameroon, with a household reason and 1 passenger. The second row is for a request on 06/2013 6:00 P, for client Beckster, Cameroon, with a household reason and 5 passengers. The third row is for a request on 08/2013 6:00, for client Adon James, with a court appearance reason and 1 passenger. A red rectangle highlights the 'Approval' dropdown menu for the first row, which is currently set to 'Approved'. The dropdown menu is open, showing the following options: Approved, --Nothing--, Approved, Denied, Hold, and Pending.

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

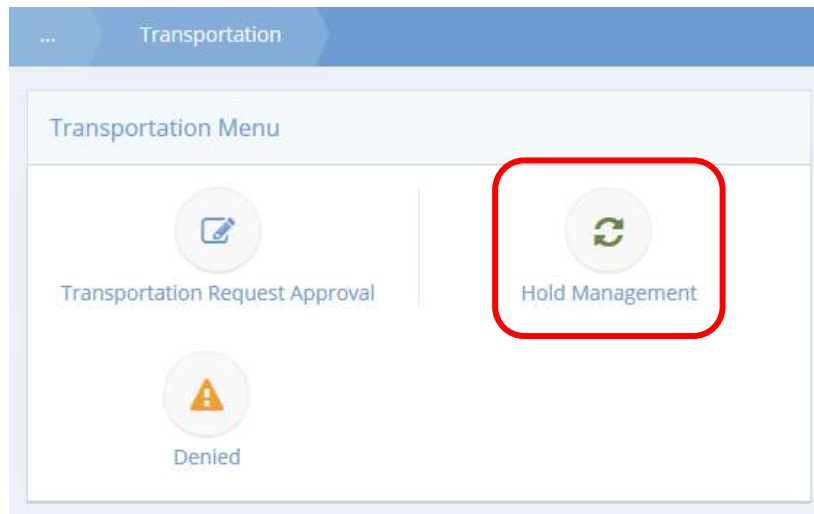
Once a transportation request has been approved, the next step is usually to assign a driver and a vehicle for the job. Select a driver from the drop-down list. Select a vehicle from the drop-down list. To verify any info for the request, click the magnifying glass icon under View Trans. Request. Click Done when finished.

The screenshot shows the 'View Transportation Request' interface. The form displays details for a transportation request. At the top, there are filters for 'Date of Transportation Request' (09/09/2014 07:00 p) and 'Client' (Draper, Sally). Below this are fields for Address 1 (123 Main Street), Address 2, City (Austin), State (TX), Zip Code (78703), Cell Phone, Home Phone, Latitude (30.3), and Longitude (-97.75). The Mode is Round Trip, Reason for Request is Court Appearance, and Date Transportation Needed is 09/09/2014. The Number of Passengers is 1. The form also includes sections for Program and Service, and To and From Address Location Information. The 'Program and Service' section has fields for Program Enrollment and Service. The 'To and From Address Location Information' section has fields for Pickup Location and To Location (Catholic Charitable Bureau Archdiocese of Boston). A 'Done' button is at the bottom right.

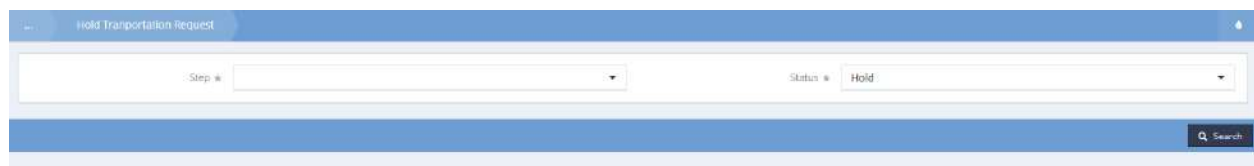
## *Hold Transportation Request*

**Objective:** View and release holds on transportation requests.

**Navigation:** Organization>Approvals>Transportation



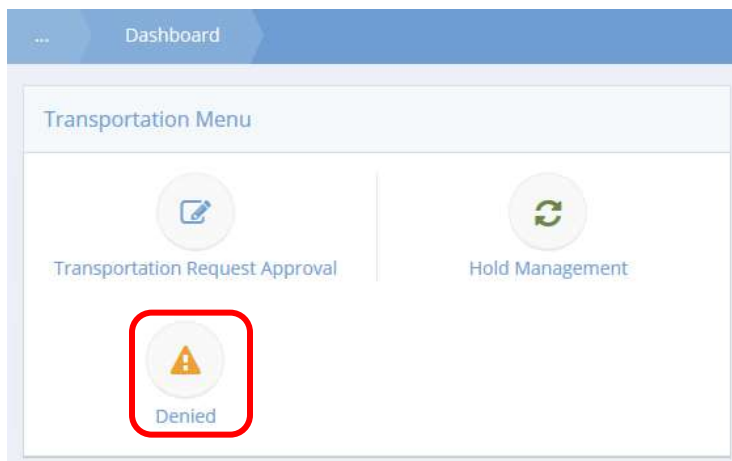
Click the icon for Hold Management. The Hold Transportation Request form displays.



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.

The screenshot shows the "Transportation Denied" form. At the top, there is a header bar with "Transportation Denied" and a bell icon. Below the header, it says "Total Rows: 1". The main content is a table with four columns: "Denied Date", "Denied Reason", "Denied By", and "Client". The table contains one row of data.

Denied Date	Denied Reason	Denied By	Client
6/17/2015	Denied Test Reason	Bingel, Brian	Irons, Jeremy

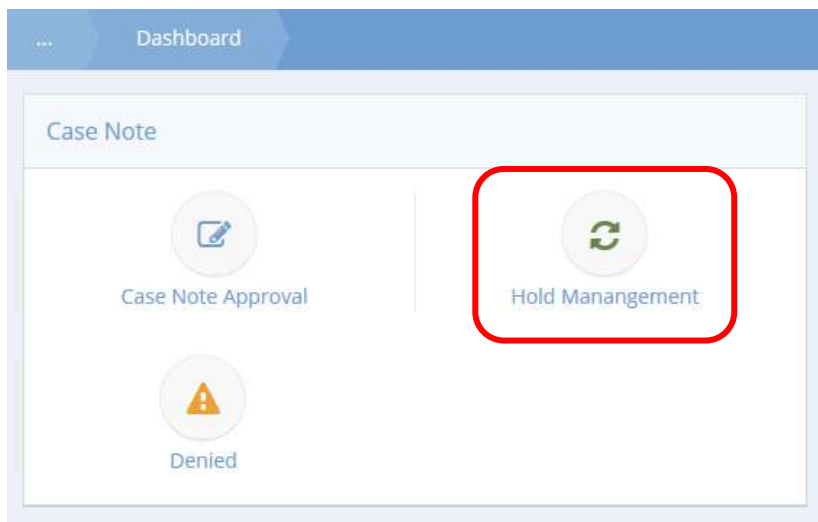
Any denied transportation requests display in the summary form.


## Case Note

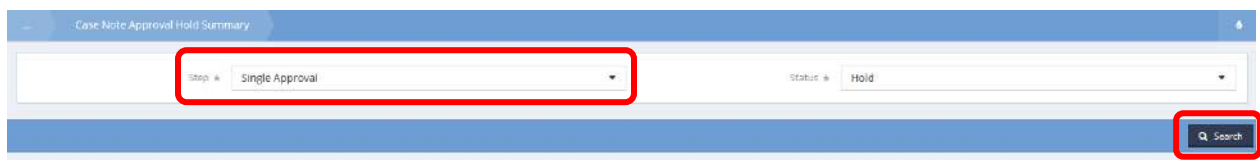
### Case Note Approval Hold Summary

**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

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.

Case Note Approval Hold Summary

Step \* Single Approval

Status \* Hold

Total Rows: 1

Created Date

Client Name

Case Note

Case Note Summary

Preview

Case Note Data

Approval ID


+ Release Hold


Test, Jane150

Case Note

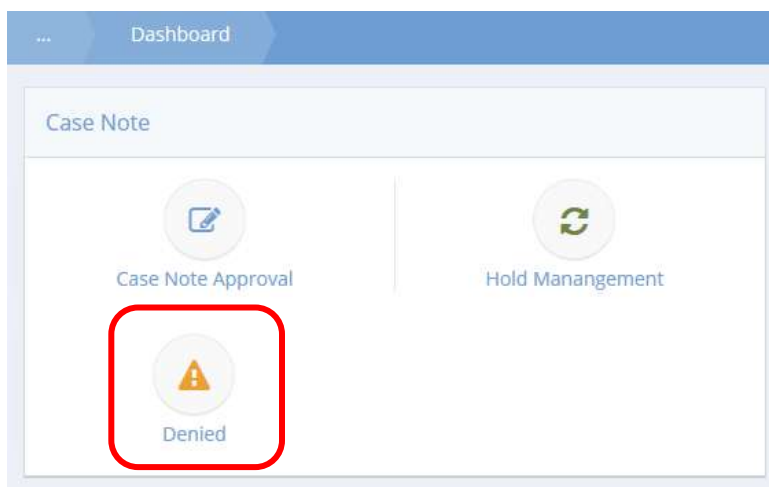
Client Release Email dbates

24163

The Release Hold form displays. Select a Released Reason from the drop-down list and click  Save when finished.

Released Date:	07/01/2015	11:34 a
Released By:	Eliason, Adrian	
Released Reason:		
Released Description:		
Place on Hold Information		
Hold Created Date:	06/11/2015	05:48 p
Hold Created By:	Bingel, Brian	
Hold Reason:	Lack of Documentation	
Hold Description:	Test Hold Desc. D Bates	

### 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.

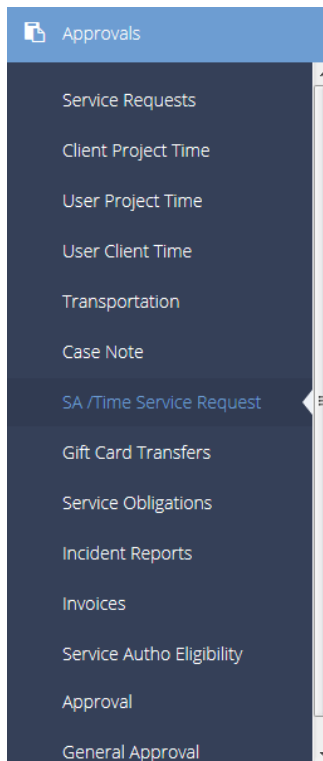
Case Note Denied						
Total Rows: 4						
Denied Date	Denied By	Denied Reason	Client	Case Notes Created Date	Case Note Summary	Note ID
6/11/2015			Test, Jane1	1/30/2015 7:49 AM	<a href="#">CC Boston</a>	9362
6/10/2015			test_jane150	2/2/2015 10:26 AM	<a href="#">CICP Letter</a>	9363
6/11/2015	Bingel, Brian	Proper documentation was not provided	Test, Scott	1/29/2015 1:19 PM	<a href="#">test</a>	9356
6/11/2015			Test, Jane150	1/30/2015 7:36 AM	<a href="#">CICP Letter</a>	9361

The Case Note Preview Read Only form displays.

Case Note Preview Read Only	
Summary *	CC Boston
Template	
Type	Case Note
Client	Test, Jane1
Created By	Tjoe, Jane
Note Description	<div>YOUTH AGAINST GANG ACTIVITY PROGRAM (YAGA) Parental consent form High school</div>
Dear Parent:	
Program Enrollment	
Sharing	Shared



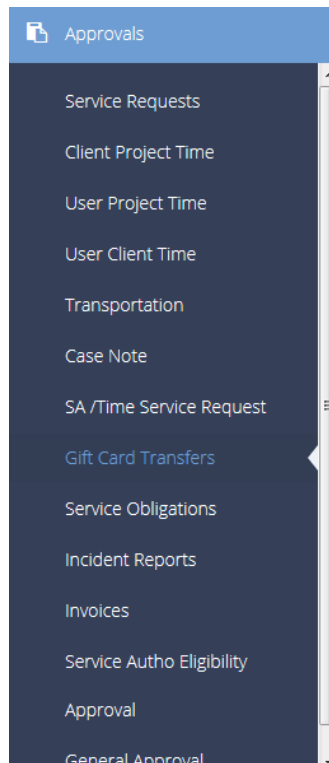
## SA / Time Service Request



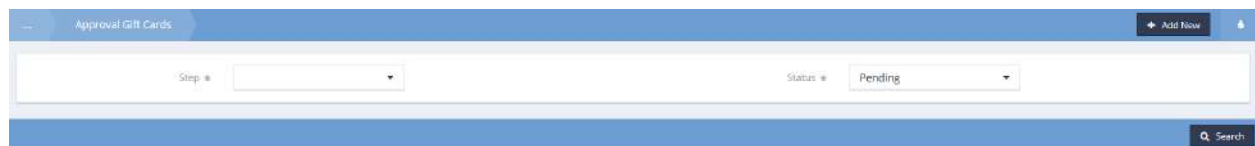
Use this area to approve incident reports. The functionality works the same as in [Service Request Approvals](#) outlined above

A screenshot of a web application interface for 'SA Service Request'. At the top, there is a blue header bar with the text 'SA Service Request' and an 'Add New' button. Below the header, there is a search bar with the placeholder text 'Job Process - Date Range' and a date range selector showing '05/08/2015' to '05/08/2015'. Below the search bar, there is a blue bar with a 'Search' button. At the bottom, there is a table with four columns: 'ID', 'Begin Date', 'End Date', and 'Bill Frequency'.

## Gift Card Transfers



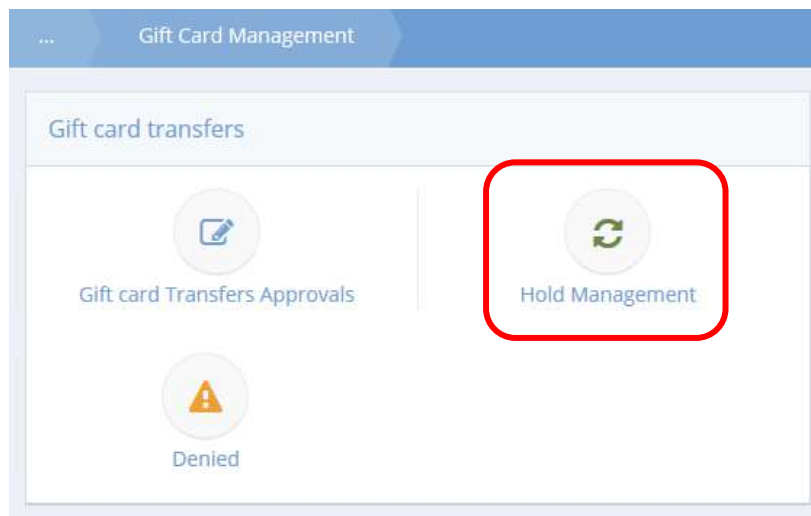
Use this area to approve gift card transfers. The functionality works the same as in [Service Request Approvals](#) outlined above



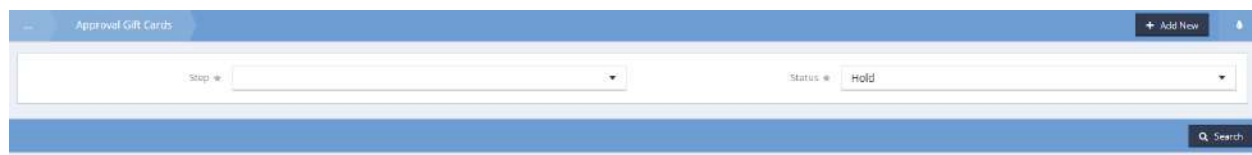
### *Hold Gift Cards*

**Objective:** View and release holds for gift card transfers.

**Navigation:** Organization>Approvals>Gift Card Transfers

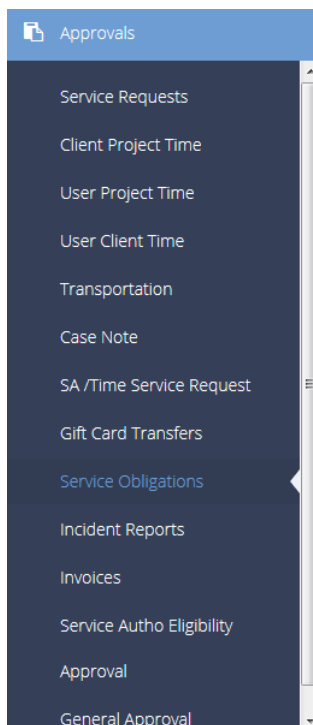


Click the icon for Hold Management. The Approval Gift Cards form displays.



Holds are released in the same way as described in the Background Check section of this document.

## Service Obligations

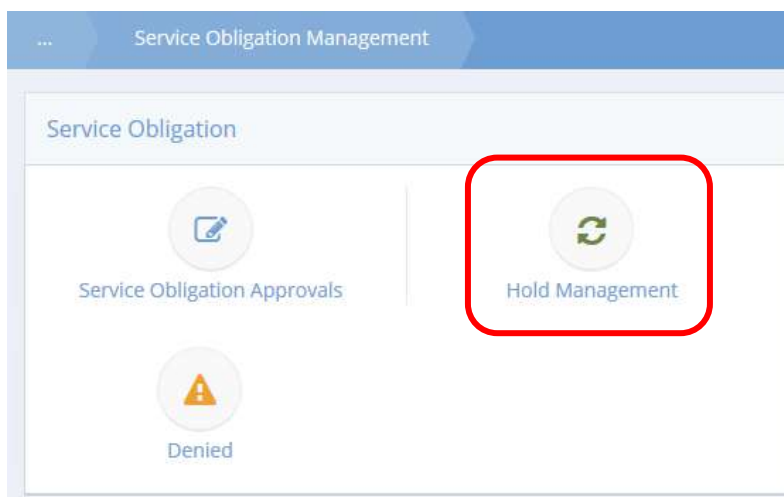


Use this area to approve gift card transfers. The functionality works the same as in [Service Request Approvals](#) outlined above

### *Service obligation hold*

**Objective:** View and release service obligation holds.

**Navigation:** Organization>Approvals>Service Obligations



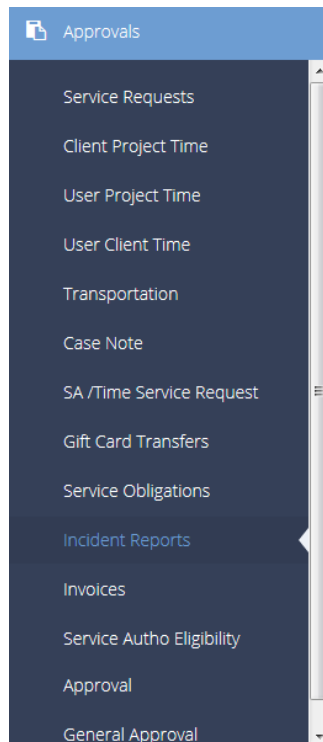
Click the icon for Hold Management. The Service Obligation Hold form displays.



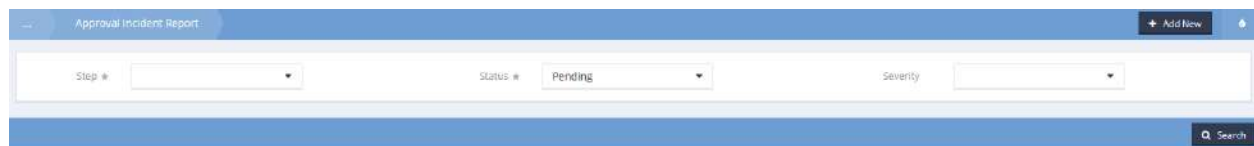
The screenshot shows the 'Service obligation hold' form. At the top, there is a blue header bar with the text 'Service obligation hold' and a small icon on the right. Below the header, there is a white form area. On the left, there is a 'Step' dropdown menu. On the right, there is a 'Status' dropdown menu with 'Hold' selected. Below the form area, there is a blue bar with a 'Search' button on the right. The background of the page is light blue.

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.

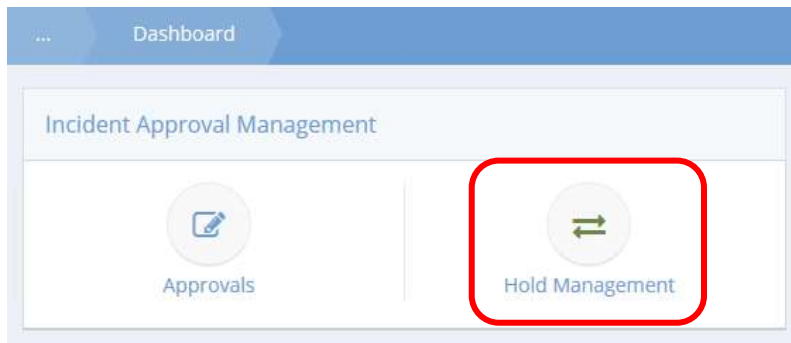


## Incident Approval Management

**Objective:** View or release holds on incident reports on hold.

### *Hold Management*





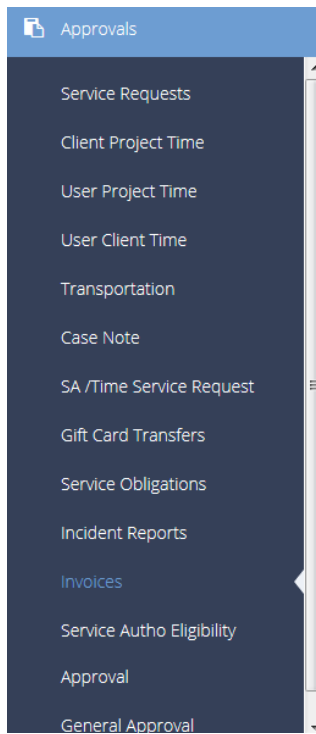
Click the icon for Hold Management. The Approval Incident Report form displays. Select a Step from the drop-down list and select a Severity if desired. Click the **Search** button.


Results display in the spreadsheet below.

ID	Incident Date & Time	Incident Summary	Resource
33089	6/5/2015 6:57 AM	INCIDENT MEDIUM APPROVAL TEST	DV Classes

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  Search button.

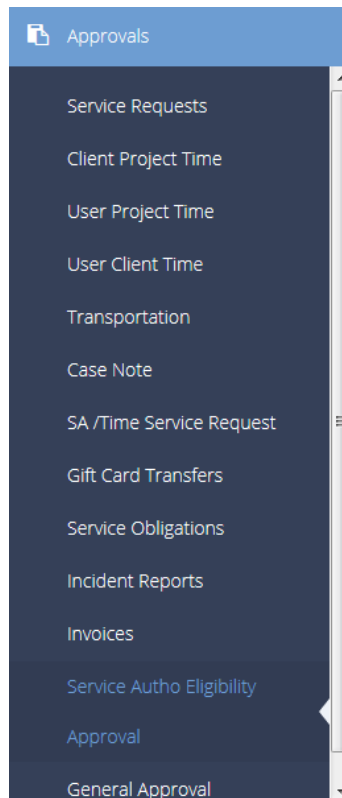
A screenshot of the 'Invoice' search interface. It features a header bar with the word 'Invoice' and a search icon. Below the header is a search bar with fields for 'Client', 'Invoice Date' (with a date picker set to 05/05/2015), 'to' (with a date picker set to 05/05/2015), and 'Service'. Below the search bar, it says 'Total Rows: 0'. To the right of this is a 'Search' button with a magnifying glass icon, which is highlighted with a red rectangle. Below the search bar is a table with four columns: 'Invoice Date', 'Client', 'Service', and 'To Provider'.

Relevant invoices display in the spreadsheet below.

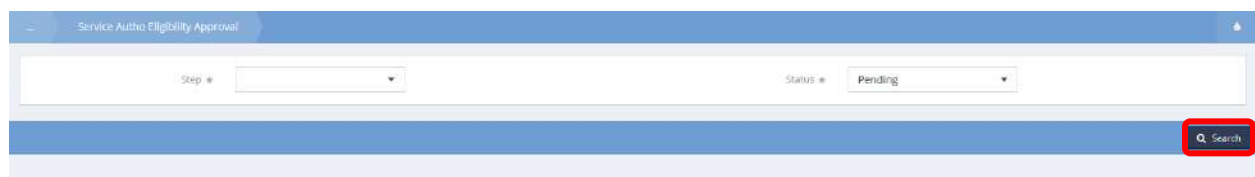
A screenshot of the 'Invoice' search interface showing two results in a table. The search bar has 'Client' set to 'Wrapp, Mitch', 'Invoice Date' set to '05/01/2013', and 'to' set to '05/05/2015'. The 'Total Rows: 2' is displayed. The 'Search' button is highlighted with a red rectangle. Below the search bar is a table with four columns: 'Invoice Date', 'Client', 'Service', and 'To Provider'. The table contains two rows of data, both of which are highlighted with a red rectangle.

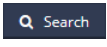
Invoice Date	Client	Service	To Provider
1/21/2014	Wrapp, Mitch	Carpet	CaseWorthy
1/21/2014	Wrapp, Mitch	Carpet	CaseWorthy

## 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.

Service Authn Eligibility Approval

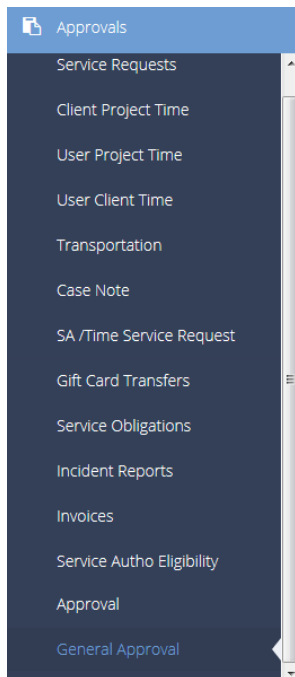
Step \* Single Approval Status \* Pending

Search

Client	Summary Description	Obligation Begin Date	Service Type	Amount	Discussion Threads	ApprovalID
<input checked="" type="checkbox"/> Test, Jane530	Jane530 - 1000/100 - month/each	1/6/2015	Utility Assistance, Utility Deposit	\$1,000.00	<a href="#">Discussion Threads</a>	23670
<input checked="" type="checkbox"/> test, Jane151	test Jane151 - 500	01/02/2015	AA Meeting, ADC	500.00	<a href="#">Discussion Threads</a>	22633
Approval * Approved						
<input checked="" type="checkbox"/> test, Jane151	Test	1/2/2015	AA Meeting, ADC	\$0.00	<a href="#">Discussion Threads</a>	22631
<input checked="" type="checkbox"/> Sparks, Colby	Case Management Services - SA	12/19/2014	Case Management	\$4,000.00	<a href="#">Discussion Threads</a>	22371
<input checked="" type="checkbox"/> Test, Jane121	2014 Jane121	1/1/2014	AA Meeting, Adult Counseling Service	\$100.00	<a href="#">Discussion Threads</a>	22355

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 [Save](#) button.

## General



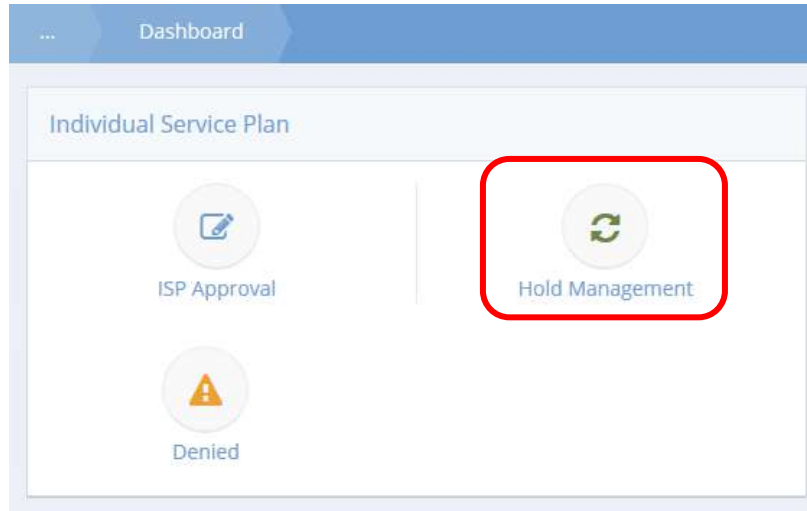
Use this area for any type of approval process. Use the Approval Context Type drop-down list to select the type of approval process to utilize. The functionality works the same as in [Service Request Approvals](#) outlined above.

## 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.

Service Plan Approval Hold Summary

Step \*Single Approval

Status \*Hold

Total Rows: 1

6/17/2015 8:41 AM

Test, QA

Lack of Documentation

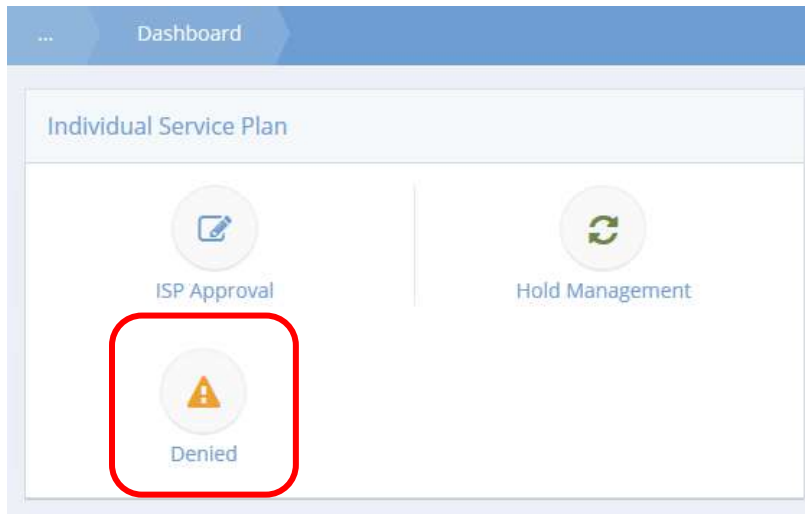
Truman, jerry

GED Test

Jane Test

1491

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.

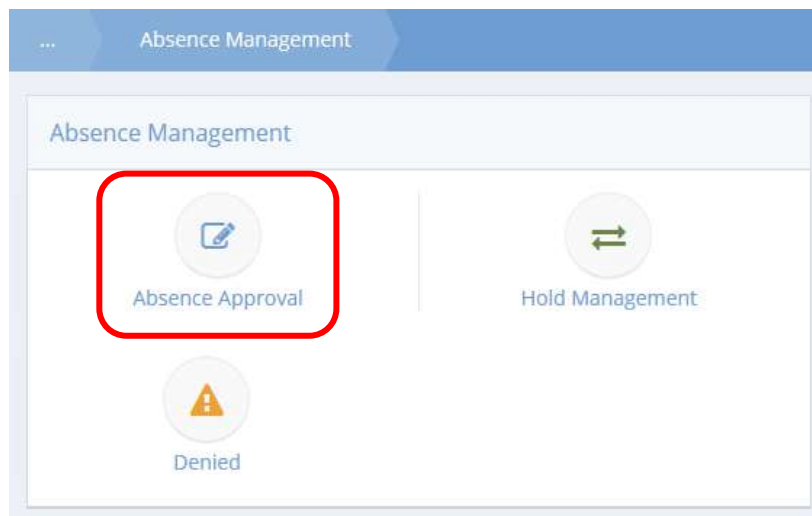
Denied ISP Summary						
Total Rows: 20						
Denied Date	Denied By	Denied Reason	Client	Plan Begin - End Date	Plan Description	Plan ID
6/17/2015 2:52 PM	Bingel, Brian	Denied Test Reason	Jane, Calamity	4/5/2012 -	Test	12
6/17/2015 1:05 PM	Bingel, Brian	test mrrr	Rivers, Theresa	5/27/2015 -	Test Plan 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	6/6/2015 -	Test	1484
4/15/2015 2:59 PM		really?	Draper, Sally	9/1/2014 -	test	197
4/15/2015 2:27 PM		jfbujhuhh kuh	Draper, Sally	10/14/2014 -	test with issue	202
4/15/2015 2:21 PM		uly 0piopoi0im lulou	Draper, Sally	10/1/2014 -	test	196
3/27/2015 3:00 PM		bjk kuhh	Lantern, Green	10/24/2014 -	another test	219

## Absence

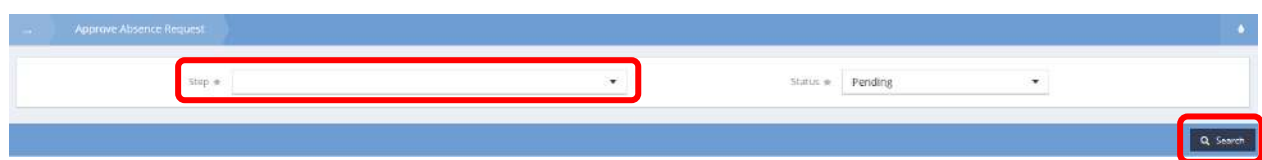
### Absence Management


**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  Search button. Results display in the spreadsheet below.





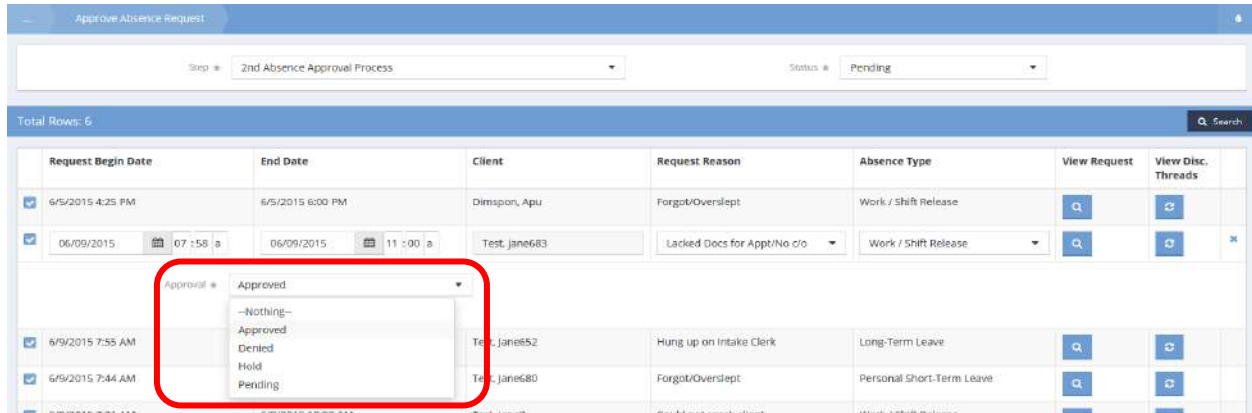
Approve Absence Request









Step \* 2nd Absence Approval Process Status \* Pending

Total Rows: 6

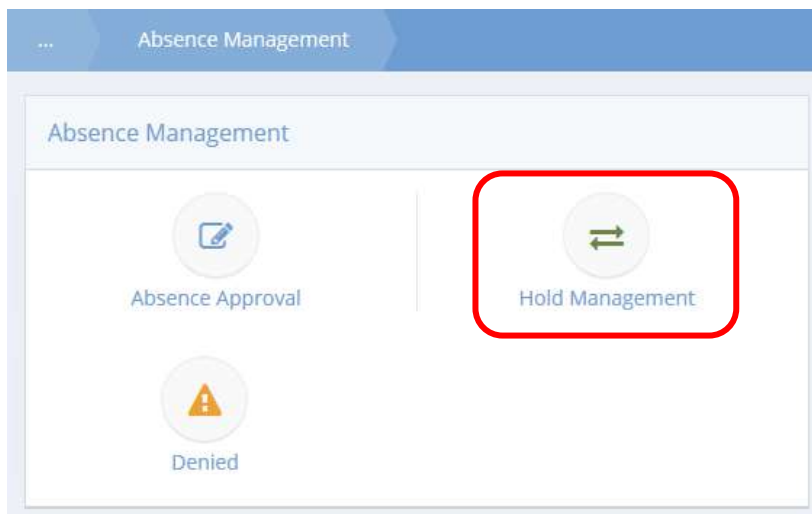
	Request Begin Date	End Date	Client	Request Reason	Absence Type	View Request	View Disc. Threads
<input checked="" type="checkbox"/>	6/5/2015 4:25 PM	6/5/2015 6:00 PM	Dimson, Aju	Forgot/Overslept	Work / Shift Release		
<input checked="" type="checkbox"/>	06/09/2015 07:58 a	06/09/2015 11:00 a	Test Jane683	Lacked Docs for Appt/No c/o	Work / Shift Release		
	Approval * Approved						
<input checked="" type="checkbox"/>	6/9/2015 7:55 AM		Test Jane652	Hung up on Intake Clerk	Long-Term Leave		
<input checked="" type="checkbox"/>	6/9/2015 7:44 AM		Test Jane680	Forgot/Overslept	Personal Short-Term Leave		

To 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.

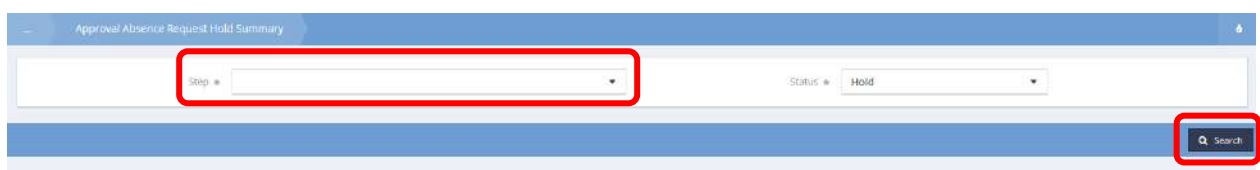


Request Begin Date	End Date	Client	Request Reason	Absence Type	View Request	View Disc. Threads
6/5/2015 4:25 PM	6/5/2015 6:00 PM	Dimson, Aju	Forgot/Overslept	Work / Shift Release		
06/09/2015 07:58 a	06/09/2015 11:00 a	Test, Jane683	Lacked Docs for Appt/No c/o	Work / Shift Release		
6/9/2015 7:55 AM		Test, Jane652	Hung up on Intake Clerk	Long-Term Leave		
6/9/2015 7:44 AM		Test, Jane680	Forgot/Overslept	Personal Short-Term Leave		


### 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.

Approval Absence Request Hold Summary

Step \*2nd Absence Approval Process

Status \*Hold

Total Rows: 1

Search

Hold Date	Hold User	Hold Reason	Hold Description	Client	Request Reason	View Request	View Threads
<div>6/5/2015 4:49 PM</div>	Bingel, Brian	Lack of Documentation	Hold Test Description	Rivers, Theresa	Forgot/Overslept	<div></div>	<div></div>

Results display in the spreadsheet below.



Approval Absence Request Hold Summary

Step is 2nd Absence Approval Process

Status is Hold

Total Rows: 1

Hold Date	Hold User	Hold Reason	Hold Description	Client	Request Reason	View Request	View Threads
<div><div><div>Release Hold</div></div></div>	Bingel, Brian	Lack of Documentation	Hold Test Description	Rivers, Theresa	Forgot/Overslept	<div></div>	<div></div>

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.

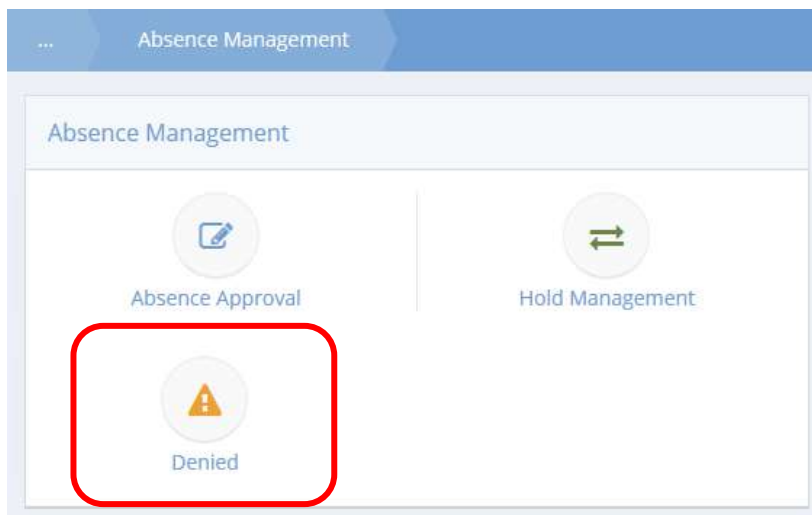
Release Hold	
Released Date: 07/01/2015 08:37 a	
Released By: Eliason, Adrian	
Released Description:	
Place on Hold Information	
Hold Created Date: 06/05/2015 04:49 p	
Hold Reason: Lack of Documentation	
Hold Created by: Bingel, Brian	
Hold Description: Hold Test Description	
Released Reason *	<div> --Nothing--  Lack of Documentation  Further Discussion Needed  Mics. </div>

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.

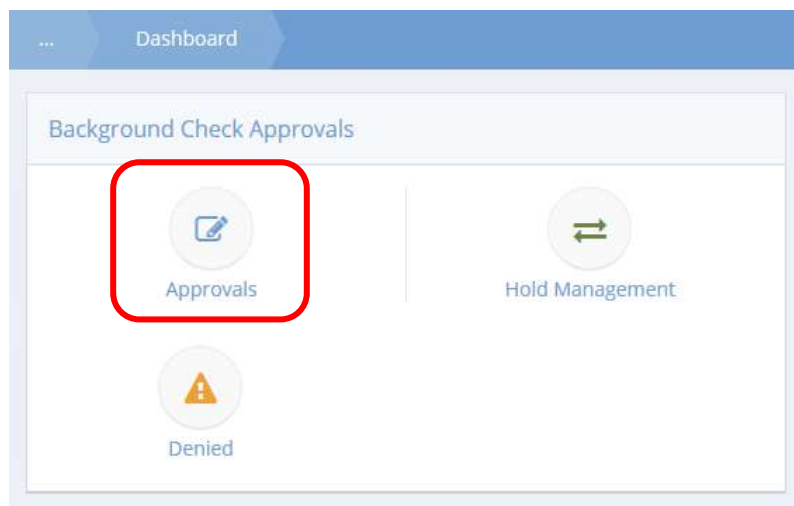
The screenshot shows the 'Absence Management (Edit)' form. The top section includes date and time pickers for 'Request Begin Date/Time' (04/27/2015 09:34 a) and 'Request End Date/Time' (04/30/2015 12:00 a). Below these are input fields for 'Client Name' (Rivers, Theresa), 'Reason' (Forgot/Overslept), 'Provider Location' (CaseWorthy), and 'Usage' (BiWeekly Tuesday Laundry). To the right, there are fields for 'Emergency Contact', 'Absence Type ID' (Work / Shift Release), 'Resource' (Baker Street - Shelter Laundry), and 'Approval Process' (Absence Approval Process). A large text area for 'Absence Note' contains the text 'This is a Test Approval Process so that we can see if the approval process is working.' and a 'p' paragraph marker. At the bottom, there are fields for 'Scheduler' (Argeris, Scott), 'Client Direct Supervisor' (Repolo, Richard), 'Program Staff' (Bingel, Brian), and 'Restriction' (Shared). A blue 'Save' button is located at the bottom center.

Make any desired changes and click  Save when finished.

## Background Checks

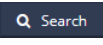
### Approval Contact Background Check Hold Summary

**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  button.

Results display in the spreadsheet below.

Approval Contact Background Check

Step: Single Approval Status: Pending

Total Rows: 3

Request Date	Foster Care Provider	Client	Position Applied For	Background Agency	Foster ID
06/04/2015	Adrian's Bistro	Contact, Jane	Restaurant Manager	Brown Securities	9711
2/9/2015	Johnson, Sam Foster Care Home	Jane, Barry	Care Provider	Brown Securities	1759
2/7/2015	Adrian's Bistro	Sufarto, Jane	Care Taker Assistant	Brown Securities	9711

Approval: Pending

View Discussion Threads Background Request

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.

Approval Contact Background Check

Step: Single Approval Status: Pending

Total Rows: 1

Request Date	Foster Care Provider	Client	Position Applied For	Background Agency	Foster ID
07/06/2015	CaseWorthy	Austin, Steve	testposition	testemployer	14

Approval: Approved

View Discussion Threads Background Request

To view or edit a request, click the Background Request button.

Background Request

Back Ground Check

background Agency: testemployer

Applied Date: 07/06/2015

Care Manager: Austin, Steve

Position: testposition

State Barred Reference: Not Barred

Pending, Approved, Hold or Denied Status

Status: New/Pending Approvals

Foster Care Home and Related Contact

Provider of Foster Care Name: CaseWorthy

Background Check Contact Name: Steve

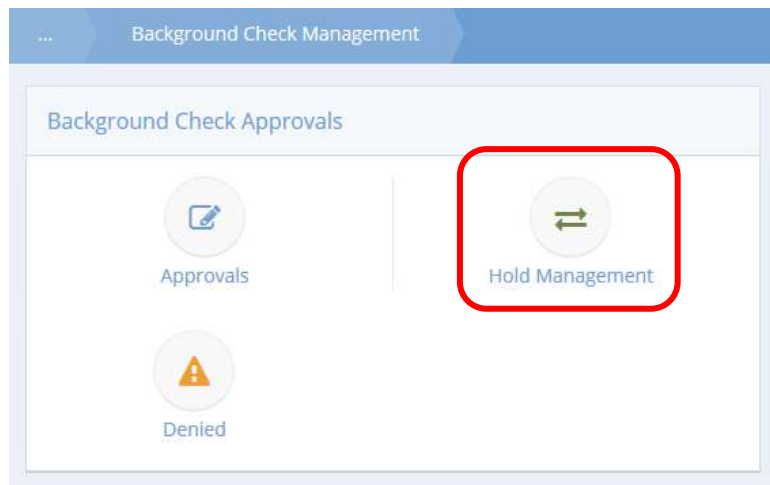
Make any desired changes and click Save when finished.



## 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.

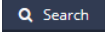
Approval Contact Background Check

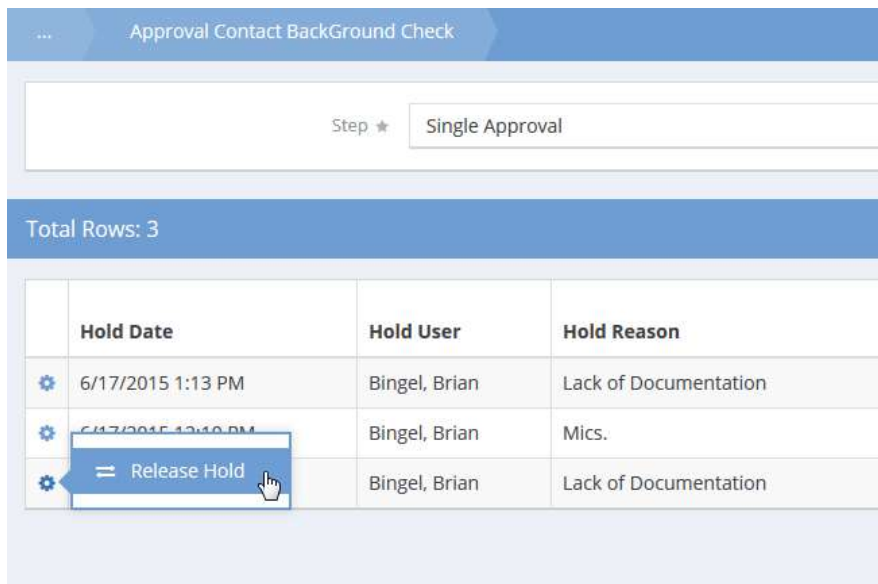
Step: Single Approval




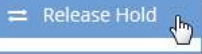
Status: Hold


Total Rows: 3

	Hold Date	Hold User	Hold Reason	Hold Description	Client	Foster Care Provider / Position	Foster ID
	6/17/2015 1:13 PM	Bingel, Brian	Lack of Documentation	Need Credentials	CaseWorthy	Catholic Charities / Care Giver	8431
	6/17/2015 12:10 PM	Bingel, Brian	Misc.	Need More Information from Prog. Staff	CaseWorthy	Adrian's Bistro / hgb oj p	9711
	6/17/2015 1:12 PM	Bingel, Brian	Lack of Documentation	tesetset	CaseWorthy	Adrian's Bistro / hgb oj p	9711

Use the drop-down lists and  button to view a filtered list of existing holds.



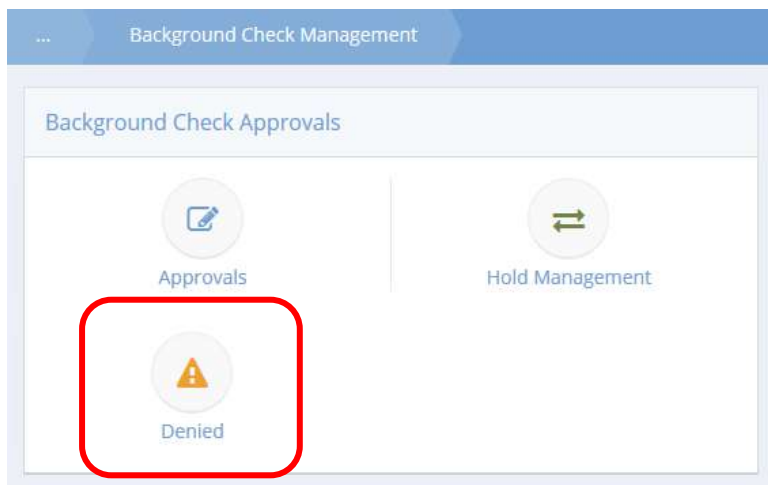
	Hold Date	Hold User	Hold Reason
	6/17/2015 1:13 PM	Bingel, Brian	Lack of Documentation
	6/17/2015 12:10 PM	Bingel, Brian	Mics.
		Bingel, Brian	Lack of Documentation

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	<a href="#">test11</a>

## Expense Reports

**Objective:** View and approve expense requests.

**Navigation:** Organization>Approvals>Expense Reports>Approved

The Approve Expense Request form displays.

The screenshot shows the 'Approve Expense Request' form. At the top, there is a header bar with the title 'Approve Expense Request'. Below the header, there are two dropdown menus: 'Step' with 'Single Approval' selected, and 'Status' with 'Pending' selected. A search bar is located on the right side of the header. The main content area is a table with the following columns: 'Date', 'View Discussion Threads', 'Client', and 'Project Transaction'. The table contains 10 rows of data, all with a status of 'Pending'. The first row is expanded, showing a date of 3/8/2017, a client of 'Administrator', and a project transaction of 'Test'. The bottom of the form has a 'Save' button and a 'Cancel' button.

Date	View Discussion Threads	Client	Project Transaction
3/8/2017		Administrator	Test
2/19/2017		Abbott, Andrew	Trans 2
2/19/2017		Abbott, Andrew	Trans 1
2/17/2017		Abbott, Andrew	PDF
2/17/2017		Abbott, Andrew	Baby
2/17/2017		Abbott, Andrew	Beard
2/15/2017		Abbott, Andrew	Lucy
2/14/2017		Abbott, Andrew	oh
2/14/2017		Abbott, Andrew	OH
2/14/2017		Abbott, Andrew	yerp

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 screenshot shows the 'Approve Expense Request' form with the first row expanded. The expanded row shows a date of 03/08/2017, a client of 'Administrator', and a project transaction of 'Test'. Below the row, there is an 'Approval' dropdown menu with 'Approved' selected. The bottom of the form has a 'Save' button and a 'Cancel' button.

Date	View Discussion Threads	Client	Project Transaction
03/08/2017		Administrator	Test
Approval: <span>Approved</span>			
2/19/2017		Abbott, Andrew	Trans 2

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.

Project Transaction	Hold Description	Hold Reason	Date	Client
test2	Provide more documentation.	Lack of Documentation	11/7/2016	Eliason, Adrian
test2	no required documentation.	Lack of Documentation	11/7/2016	Eliason, Adrian

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.

Denied Date	Denied Reason	Denied By	Requested By
11/7/2016	Not approved.	Eliason, Adrian	Eliason, Adrian
11/7/2016	because it's a test	Eliason, Adrian	Eliason, Adrian

This is view only form, click the  button when finished.

## Time-Off Request

### Approval Time Off Request

**Objective:** Manage time off requests.

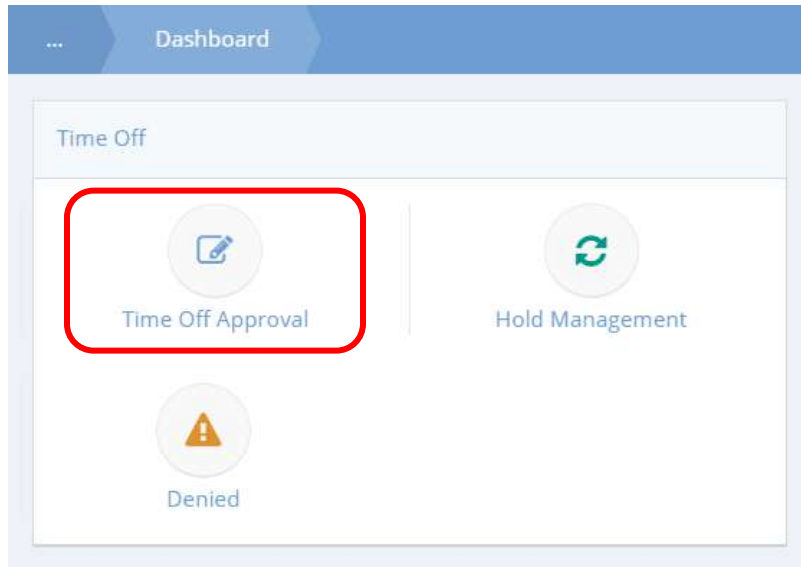
**Navigation:** Organization>Approvals>Time Off>Time Off Approval

The screenshot shows the CaseWorthy Organization Dashboard. On the left, a sidebar menu lists various categories: Favorites, Find Organization, Providers, Resources, Approvals (highlighted), Randomizers, Volunteers, Donors, Batch Data Entry, and Other. The Approvals category is expanded, showing a list of options: Service Requests, Service Request Authorizations, Individual Service Plan, Incident Report, Case Note, Gift Card Transfers, Service Obligations, Transportation, Client Project Time, User Project Time, User Client Time, Absence, Background Checks, Expense Reports, and Time Off (highlighted with a red box). The main content area displays a table titled 'Resource Usage' with columns for Resource, Usage, and Capacity. The table contains several rows of data, including 'Health Class 2 Yaga', 'TestBRODY', 'Health Education Related to Life Skill', 'Jane Test Class', 'Test Monday Class', 'Biweekly', 'Lost Friday of the month', 'Usage Jane Class', 'test', and 'Test Multi-Service'.


Resource	Usage	Capacity
Googletelb	Health Class 2 Yaga	40
User Login	TestBRODY	50
Provider Contract	Health Education Related to Life Skill	50
Service Requests	Jane Test Class	3
Service Request Authorizations	Test Monday Class	50
Individual Service Plan	Biweekly	30
Incident Report	Lost Friday of the month	30
Case Note	Usage Jane Class	30
Gift Card Transfers	test	30
Service Obligations	Test Multi-Service	100
Transportation		
Client Project Time		
User Project Time		
User Client Time		
Absence		
Background Checks		
Expense Reports		
Time Off		












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 Approval. 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
<input checked="" type="checkbox"/>	7/6/2017	8/1/2017	8/4/2017	scoy		Vacation	32			65304
<input checked="" type="checkbox"/>	6/23/2017	6/1/2017	6/30/2017	aellason	test	Bereavement	10			65269
<input checked="" type="checkbox"/>	6/15/2017	6/18/2017	6/23/2017	tlevie	Test	Jury Duty	40			65190
<input checked="" type="checkbox"/>	6/15/2017	6/11/2017	6/15/2017	tlevie	test	Bereavement	40			65189
<input checked="" type="checkbox"/>	6/15/2017	6/9/2017	6/30/2017	tlevie	test	Other	50			65188
<input checked="" type="checkbox"/>	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.



Approval Time Off Request
Search

	Request Date	Begin Date	User	Request Reason	Absence Type	View	Discussion Threads	T.O. ID
<input checked="" type="checkbox"/>	6/23/2017	6/1/2017	aellason	test	Bereavement			65269
<input checked="" type="checkbox"/>	6/15/2017	6/18/2017	blevie	Test	Jury Duty			65190
<input checked="" type="checkbox"/>	6/15/2017	6/11/2017	blevie	test	Bereavement			65189
<input checked="" type="checkbox"/>	6/15/2017	6/9/2017	blevie	test	Other			65188
<input checked="" type="checkbox"/>	04/27/2017	04/27/2017	janeTjoe	Duty 1	Jury Duty			65064

Approval ★  
Approved ▼

WF\_HIREmail  
jtjoe@caseWorthy.com

TimeOff.TimeOffID  
49

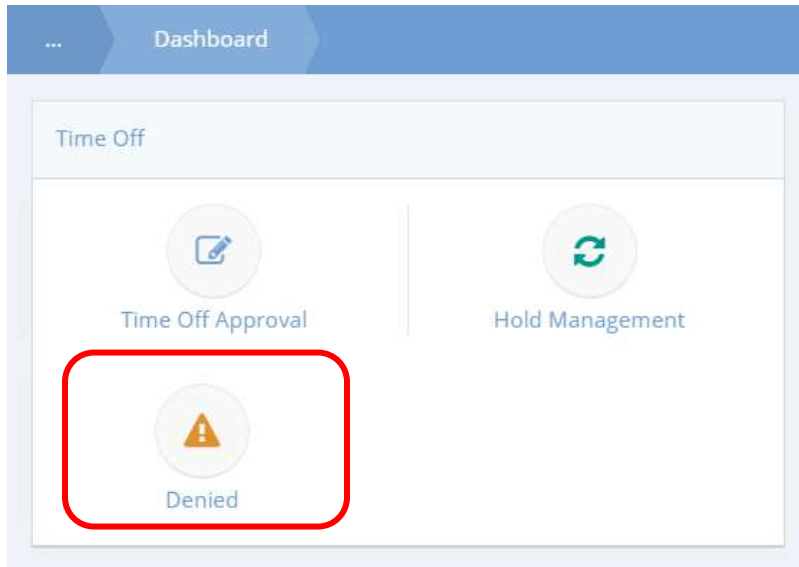
<input checked="" type="checkbox"/>	4/27/2017	4/27/2017	janeTjoe	1	Jury Duty			65053
-------------------------------------	-----------	-----------	----------	---	-----------	--	--	-------

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.

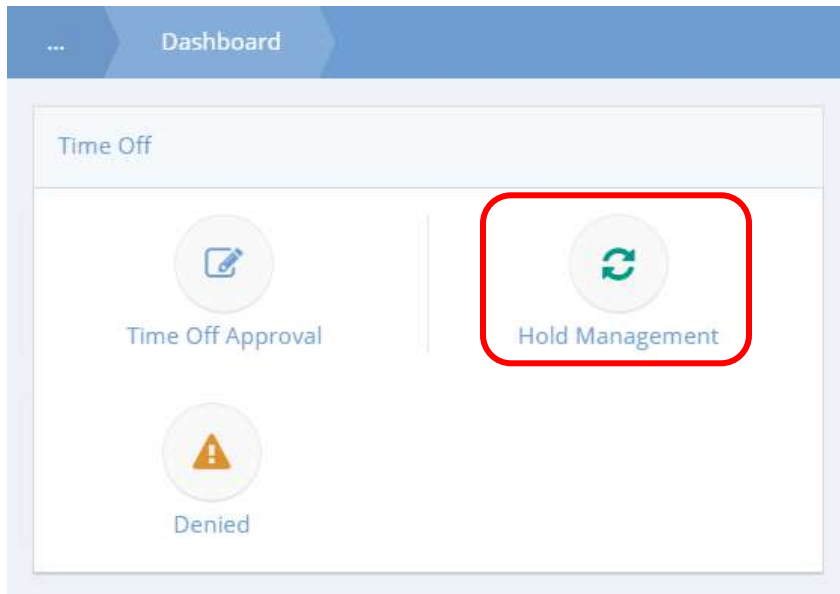
Time Off Denied			
Total Rows: 8			
Denied Date	Denied Reason	Denied By	Client
4/23/2017	Denied 5	Tyler, Jane	Page, Shaun
4/27/2017	Denied 1	Unknown	Carter, Josh
8/12/2016	Testing	Unknown	Danger, Johnny
8/12/2016	Test	Unknown	Garcia, Jerry
8/12/2016	Test 3	Unknown	Garcia, Jerry
8/12/2016	Test 2	Unknown	Garcia, Jerry
8/12/2016	Test 1	Unknown	Garcia, Jerry
6/17/2015	Denied Test Reason	Engel, Brian	Hunt, Jeremy

To return to the Time Off Dashboard, click the  Done button.

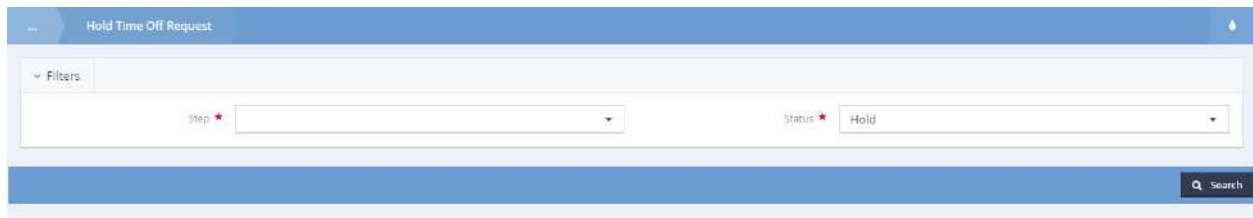
## Hold Time Off Request

**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  button.

A summary list appears.

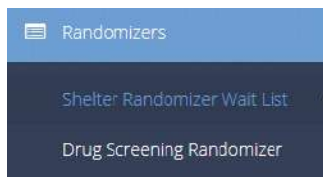
Click the action gear  icon next to the desired time off request. A pop-up menu appears.

Click Release Hold to view the Release Hold form.

Enter in any necessary information and click the  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.

 A screenshot of the 'Randomizer Wait List Summary' form. At the top right is a '+ Add New' button. Below the header are input fields for 'First Name', 'Last Name', and 'Effective Date' (with a date range from 05/08/2015 to 05/08/2015). Below these is a 'Total Rows: 0' indicator and a 'Search' button. At the bottom is a table with columns: Effective Date, Program Name, First Name, Last Name, Status, and Case Note.



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

 A screenshot of the 'Randomizer Wait List Input' form. At the top right is a '+ Add Row' button. Below the header are input fields for 'Effective Date' (05/08/2015) and 'Program'. Below these is a 'Total Rows: 0' indicator and a 'Search' button. At the bottom is a table with columns: Search Client, Wait List Date \*, Effective Date \*, Program \*, Service, Restriction, and Status.

Select a client using the magnifying glass **Q** icon lookup. Select dates, a program, and a service if desired. Click the **Save** button. The Randomizer Wait List Input form reappears.

 A screenshot of the 'Randomizer Wait List Input' form, identical to the previous one but with data entered. The 'Search Client' field has a magnifying glass icon and a dropdown arrow. The 'Wait List Date \*' field contains '05/08/2015'. The 'Effective Date \*' field contains '05/08/2015'. The 'Program' field has a dropdown arrow. The 'Service' field has a dropdown arrow. The 'Restriction' field contains 'Shared'. The 'Status' field has a dropdown arrow.

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.

Randomizer Wait List Input

Add Row

Effective Date \*

05/08/2015

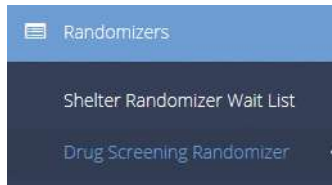
Program \*

Total Rows: 1

Search

	Search Client	Wait List Date *	Effective Date *	Program *	Service	Restriction	Status
<input checked="" type="checkbox"/>	Test, Test	5/8/2015	5/8/2015	CMHA HMIS Project		Shared	

## 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.


A screenshot of the 'Run Randomizer Drug' form. The top header is blue with the text 'Run Randomizer Drug' and a red-outlined 'Add New' button with a magnifying glass icon. Below the header is a light blue box containing a tip: 'A special randomizer can be created that will assign drug screenings on a partial week by only filling the specific day(s) with the number of clients to be screened.' Below this is a table with four columns: 'Description', 'Program', 'Team', and 'Last Run Date'.

Select a provider, program, and team from the drop-down lists. Indicate the available slots for each day. Click the **Save** button when finished.

A screenshot of the 'Run Randomizer Drug' form body. It features a blue header with 'Run Randomizer Drug' and a tip box stating 'Provider assigned to client through enrollment.' Below the tip are four dropdown menus labeled 'Batch Description \*', 'Provider \*', 'Required Enrolled Program \*', and 'Assign To Team \*'. The 'Batch Description' dropdown is set to 'Weekly Randomizer Process'. Below these is another tip: 'The randomizer process generates a list of clients based on the available slots per day. Please indicate the available slots per day for Sunday through Saturday.' This is followed by a table with seven rows for the days of the week (Sunday through Saturday) and one empty row. Each day has a corresponding input field for slots.

The new randomizer is added.

Run Randomizer Drug			
A special randomizer can be created that will assign drug screenings on a partial week by only filling the specific day(s) with the number of clients to be screened.			
Description	Program	Team	Last Run Date
Weekly Randomizer Process	Behavioral Health	test	5/8/2015

To edit, run, or view the randomizer, click the action gear  and click the relevant menu item.

Run Randomizer Drug			
A special randomizer can be created that will assign drug screenings on a partial week by only filling the specific day(s) with the number of clients to be screened.			
 Edit	Program	Team	Last Run Date
 Run Randomizer	Behavioral Health	test	5/8/2015
 View Randomizer Detail			



## Volunteers

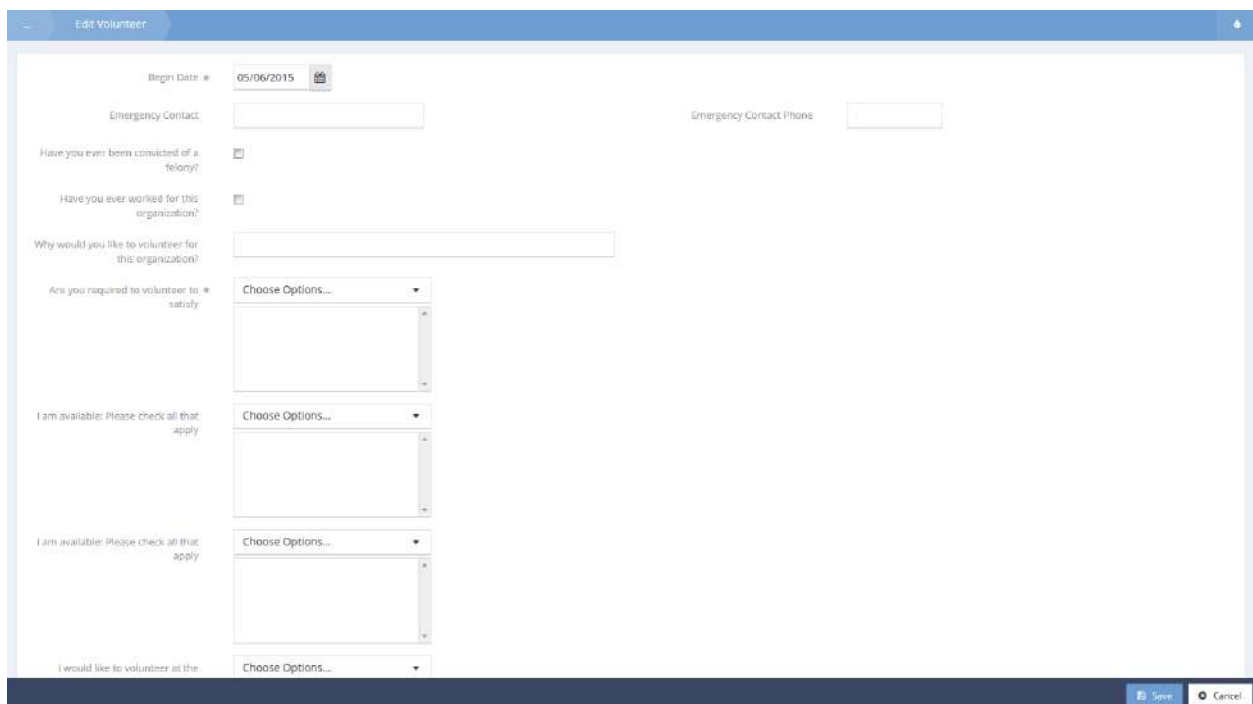
### Volunteer Application

The Volunteer Intake Application Summary is used to view and manage volunteer applications. To create a new application, click the **+ Add New** button.



Created Date	Emergency Contact	Emergency Contact Phone	Begin - End Date	Reason	Status
5/6/2015 5:11 AM			5/6/2015 - Present		Yes

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.


Are you required to volunteer to satisfy



I am available: Please check all that apply

Choose Options...

- ☒ a court order?
- ☒ a school requirement?
- ☒ a TWC (Worksource) requirement?
- ☒ Case Dismissal, Truancy
- ☒ Job Training
- ☒ Other



Add Selected Cancel

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.

Volunteer Intake Application Summary						
Total Rows: 1						
 Edit	Emergency Contact	Emergency Contact Phone	Begin - End Date	Reason	Status	
 Delete			5/6/2015 - Present		Yes	

## 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.

Portal Users Summary									
Entity Name: <input type="text"/>									
Total Rows: 186									
Name	Entity Name	Login Name	Role	Account Locked	User	EntityID			
 Robbie, Robbie	Robbie, Robbie			No		4209			
 Seay, Dale	Seay, Dale			No		4223			
 Seay, Alfonso	Seay, Alfonso			No		4224			
 Test, Paparao	Test, Paparao			No		4229			

Enter a login name and click the  **Save** button.

Add/Edit Administrative Portal User


Please enter user login information. The Password must be between 6 and 20 characters long; include one capital letter, include one number and one special character. I.e. (l@#5%&^


Login Name:

## Volunteers Without User IDs

**Objective:** View a list of volunteers without user IDs.


Volunteer Without User		
Entity Name: <input type="text"/>		
Search		
Entity Name	Email	Users EntityID
Seay, Dale	drekseay@gmail.com	
Seay, Alfonso	dseay@myecm.net	
Portal, Brian	bbingel@myecm.net	
Portal, Brian	bbingel@myecm.net	
Test, Paparao		
Test, Paparao		
Test, Paparao		

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.

Volunteer Without User		
Entity Name: <input type="text"/>		
Search		
Entity Name	Email	Users EntityID
<div>  <div> <div>Create User</div> <div>Edit</div> </div> </div>	drekseay@gmail.com	
	dseay@myecm.net	
	bbingel@myecm.net	
Portal, Brian	bbingel@myecm.net	
Test, Paparao		
Test, Paparao		
Test, Paparao		

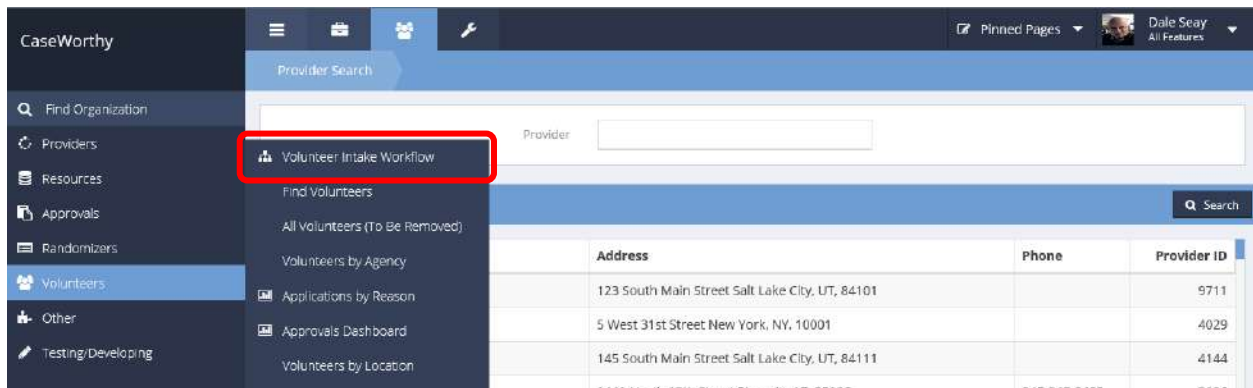
The Add/Edit Administrative Portal User form displays.

Add/Edit Administrative Portal User	
Please enter user login information. The Password must be between 6 and 20 characters long; include one capital letter, include one number and one special character. i.e. (!@#5% ^	
Login Name *	<input type="text"/>

Enter a login name and click the  Save 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.

The screenshot shows the 'Volunteer Name and Contact Information' form. The form is divided into sections. The first section, 'Volunteer Name and Contact Information', contains fields for 'First Name', 'Last Name', 'Cell Phone', 'Work Phone', 'Email', and 'Confirm Email'. The 'First Name' and 'Last Name' fields are highlighted with red rectangles. The 'Next' button is also highlighted with a red rectangle. Below this section are sections for 'Address Information', 'DEMOGRAPHIC INFORMATION (Optional—Voluntary Disclosure)', and 'Disability (choose all that apply)'. The 'Next' button is located at the bottom right of the form.

Enter a first and last name for the volunteer, along with any other available information. Click the [Next](#) button.

The next step of the Contacts – Entity As Volunteer (Add New) form, Address Information, displays.


The screenshot shows the 'Address Information' section of the 'Volunteer Name and Contact Information' form. It includes input fields for 'Address1', 'Address2', 'ZipCode' (with a search icon), 'City', and 'State'. A 'Verify Address' button with a magnifying glass icon is highlighted with a red box. Below the fields are 'Previous' and 'Next' navigation buttons, with the 'Next' button also highlighted with a red box.

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.

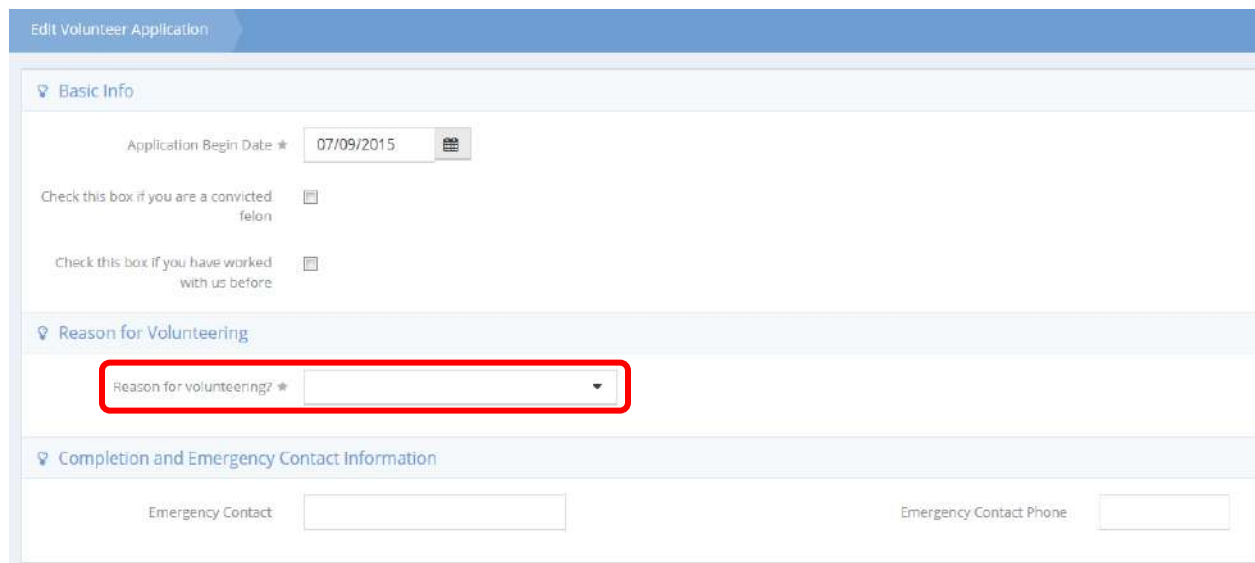
The screenshot shows the 'DEMOGRAPHIC INFORMATION (Optional—Voluntary Disclosure)' section. It includes dropdown menus for 'Gender' and 'Ethnicity', a date picker for 'Birth Date', and input fields for 'SSN' and 'Age'. A 'Veteran Status' dropdown is also present. At the bottom, 'Previous' and 'Next' navigation buttons are shown, with the 'Next' button highlighted with a red box.


Optionally, enter any available demographic info. Click the **Next** button. The Disability area displays.

The screenshot shows the 'Disability (choose all that apply):' section. It features two multi-select dropdown menus labeled 'Disabilities' and 'Barriers', both currently showing 'Choose Options...'. Below these is a dropdown for 'Are You Part of a Volunteer Group' with 'No' selected. At the bottom right, 'Previous' and 'Save' buttons are shown, with the 'Save' button highlighted with a red box.

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  to make a new entry. Click  when finished.


The next step of the workflow, the question about creating a user login, appears.

Question

Would you like to create a User Login

☒ Yes


☐ No

If creating a user login is desired, click the radio button ☒ for Yes. Click  to proceed. The form used to enter the desired user login name displays.

Add/Edit Portal Users Application Workflow

Please enter desired user name.


Login Name \*

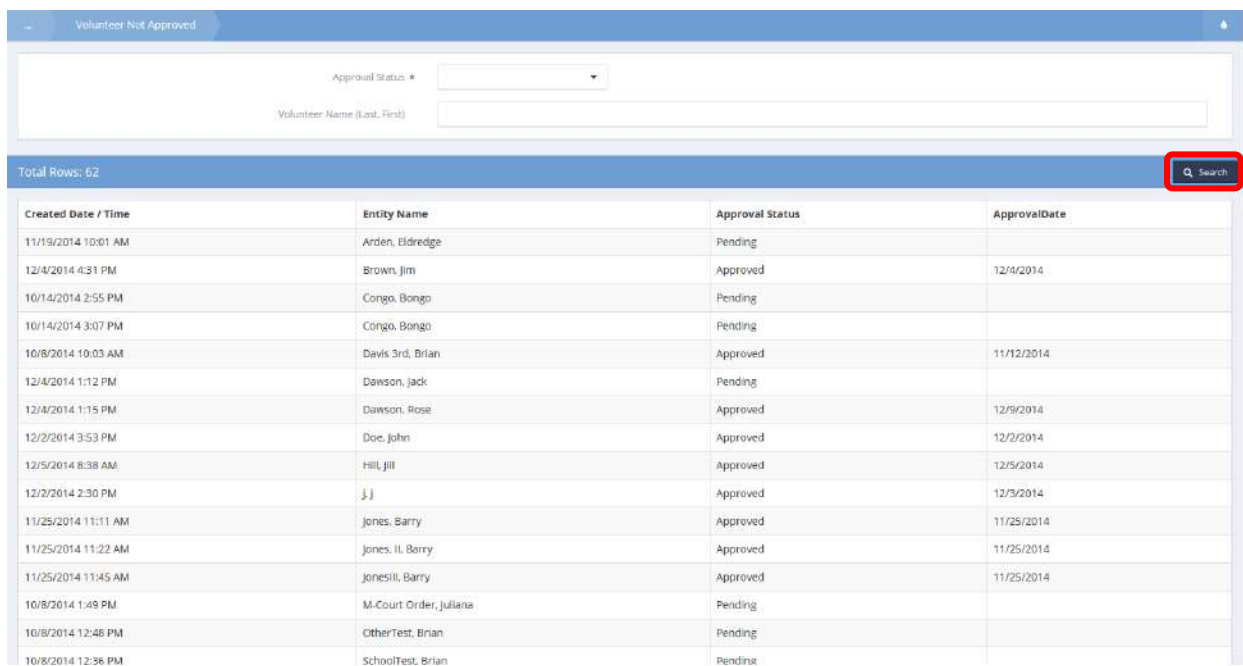
Enter the desired user name and click  when finished. The workflow is complete and the user has been created.

Workflow is now complete.			
Status	Step Name	Completed By	Completed Date
✓	Contacts - Entity As Volunteer (Add New)	Eliason, Adrian	7/9/2015
✓	Edit Volunteer Application	Eliason, Adrian	7/9/2015
✓	Entity Credential	Eliason, Adrian	7/9/2015
✓	Question	Eliason, Adrian	7/9/2015
✓	Add/Edit Portal Users Application Workflow	Eliason, Adrian	7/9/2015

## 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  when parameters are chosen. The list appears on the lower part of the form.



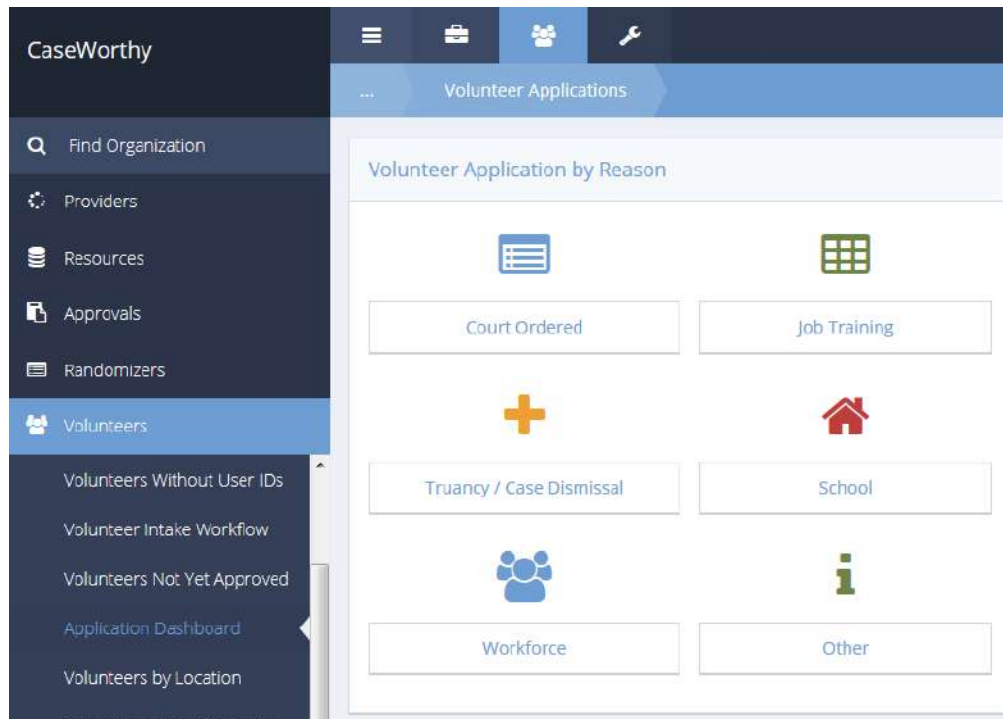
Created Date / Time	Entity Name	Approval Status	ApprovalDate
11/19/2014 10:01 AM	Arden, Eldredge	Pending	
12/4/2014 4:31 PM	Brown, Jim	Approved	12/4/2014
10/14/2014 2:55 PM	Congo, Bongo	Pending	
10/14/2014 3:07 PM	Congo, Bongo	Pending	
10/8/2014 10:03 AM	Davis 3rd, Brian	Approved	11/12/2014
12/4/2014 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

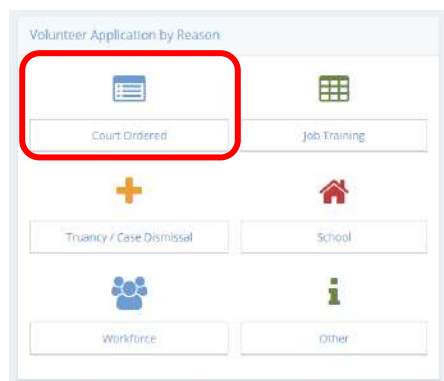
### Application Dashboard

**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.

Volunteer Court Ordered Summary

Approval Status

Total Rows: 43 Search

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	richins@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	

Done

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.

Volunteer Court Ordered Summary

Approval Status

Total Rows: 43 Search

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	richins@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	

Done


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.

The screenshot shows the 'Edit Volunteer Application' form with the following sections and fields:

- Basic Info:**
  - Begin Date: 12/18/2014
  - Emergency Contact: Jerry Timmons
  - Emergency Contact Phone: 354-645-8368
  - Check this box if you are a convicted felon: ☐
- Work with Goodwill:**
  - Check this box if you have worked with us before: ☐
  - Reason for volunteering?: a court order?
  - Charge: Theft
- Completion Information:**
  - Hours to Complete: 25
  - Completion Deadline: 01/19/2015
  - Status: New/Pending Approvals
  - From Email Address: michins@caseworthy.com

At the bottom right, there are 'Save' and 'Cancel' buttons.

Make any necessary changes and click  Save when finished.

## Volunteer Job Training Summary

Click the Job Training icon.

The screenshot shows the 'Volunteer Application by Reason' menu with the following options:

- Court Ordered
- Job Training** (highlighted with a red box)
- Truancy / Case Dismissal
- School
- Workforce
- Other

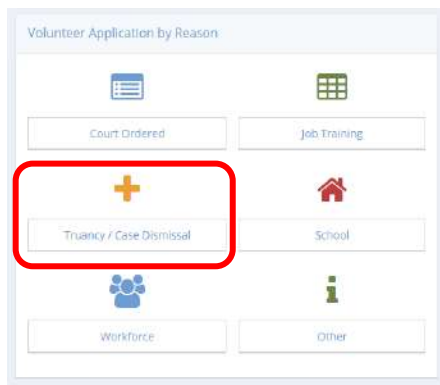
The Volunteer Job Training Summary form displays.

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	bceay		

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	Jones III, 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	Truancy/TeSet, 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.

Volunteer Application by Reason

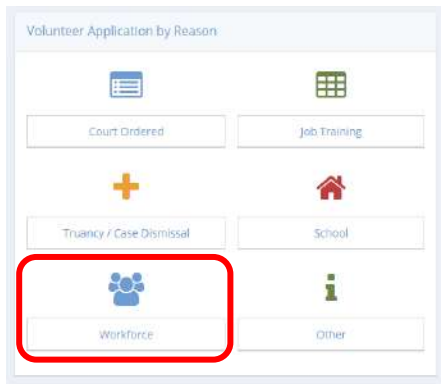
The Volunteer School Requirement Summary form displays.

Volunteer School Requirement Summary										
										Q 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.

Volunteer Workforce Requirement Summary

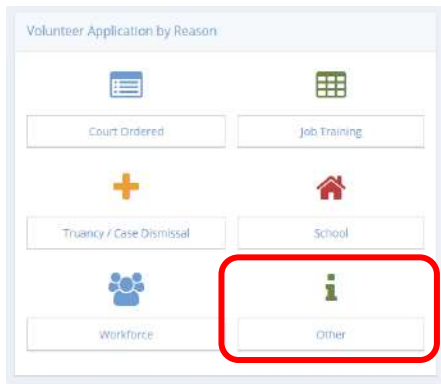
Search

	Begin Date	Reason	Status	Name	Phone Number	Email	Worksource Location	Hours To Complete	Completion Deadline
	11/25/2014	a TWC (Worksource) requirement?	Open	Jones, Il, Barry		bblingel@CaseWorthy.com	South Jordan	30	1/31/2015
	10/8/2014	a TWC (Worksource) requirement?	Open	WorkforceTest, Brian		bblingel@CaseWorthy.com	Downtown	25	12/25/2014

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.

Volunteers Other Reason Summary


Search

	Begin Date	Reason	Status	Name	Phone Number	Email	Other Description	Hours To Complete	Completion Deadline	Letter Required Upon Completion
	11/19/2014	Other	Open	Vol, JaneS08		jtjoe@CaseWorthy.com	jkjhhih	100		
	10/8/2014	Other	Open	OtherTest, Brian		bbingel@CaseWorthy.com	Want to give back to the community	32	12/31/2014	Yes

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.

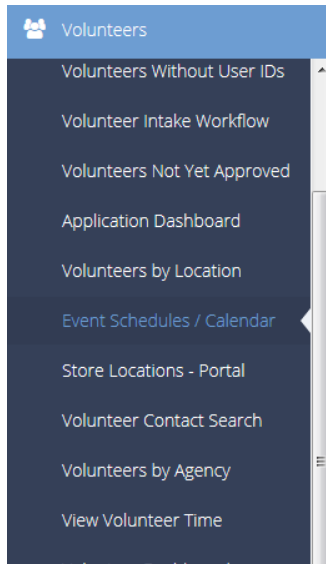


Resource	Event	Name	Primary Phone	Email	Reservation - Start Date	Reservation - End Date	Time Hours
----------	-------	------	---------------	-------	--------------------------	------------------------	------------



## 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.

Event Calendar

Location: CaseWorthy Resource: Usage:

Search

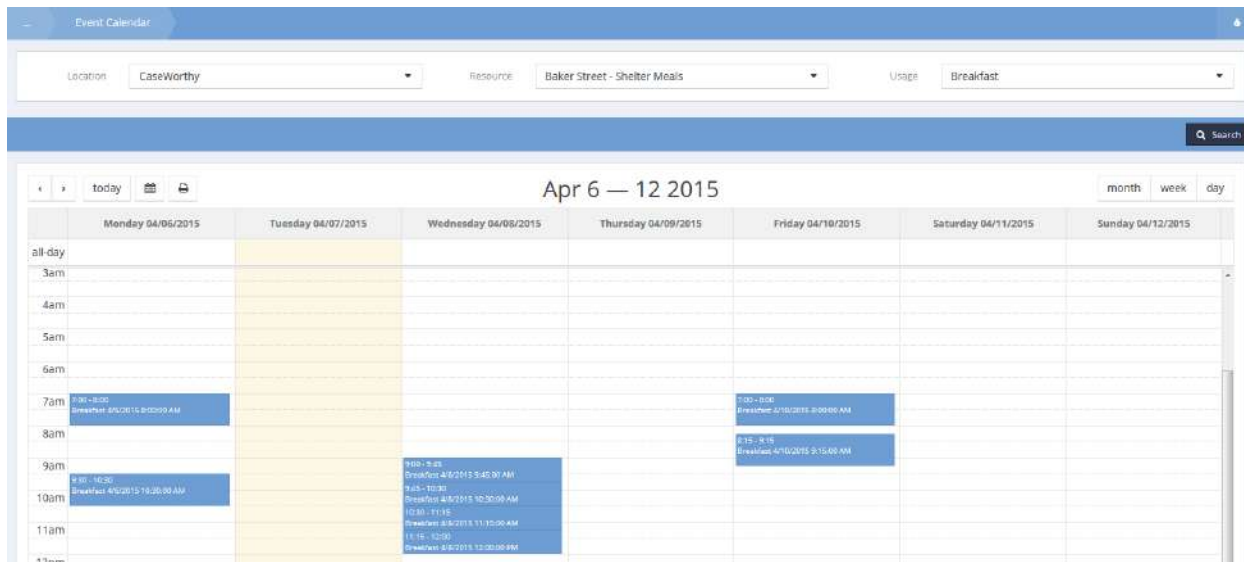
Apr 6 — 12 2015

month week day

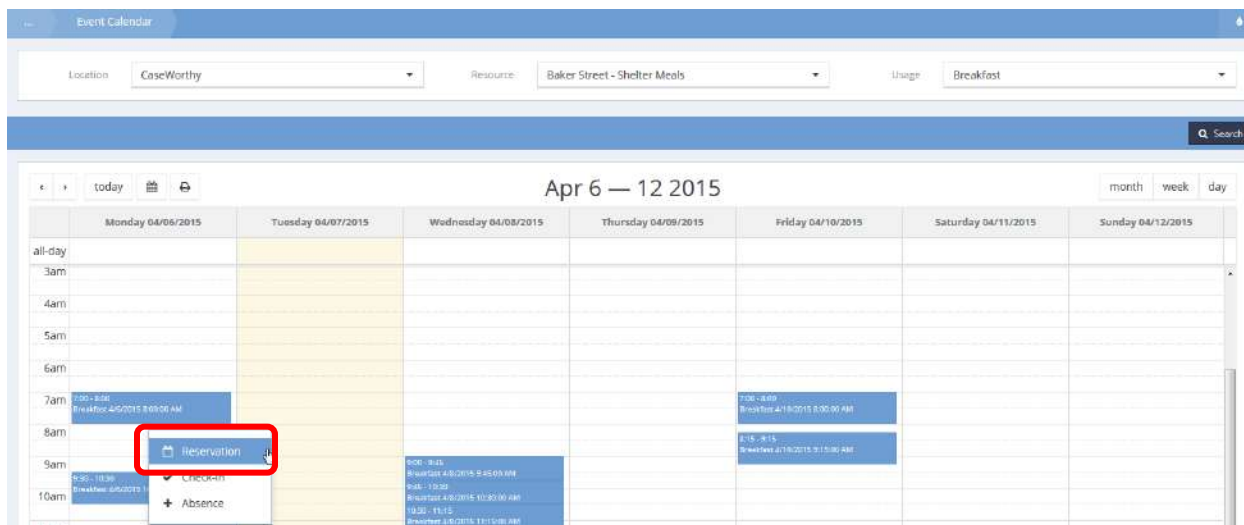
	Monday 04/06/2015	Tuesday 04/07/2015	Wednesday 04/08/2015	Thursday 04/09/2015	Friday 04/10/2015	Saturday 04/11/2015	Sunday 04/12/2015
all-day							
3am							
4am							
5am							
6am							
7am	8:00-9:00 AM: [Event Details]	8:00-9:00 AM: [Event Details]	8:00-9:00 AM: [Event Details]	8:00-9:00 AM: [Event Details]	8:00-9:00 AM: [Event Details]	8:00-9:00 AM: [Event Details]	8:00-9:00 AM: [Event Details]
8am	9:00-10:00 AM: [Event Details]	9:00-10:00 AM: [Event Details]	9:00-10:00 AM: [Event Details]	9:00-10:00 AM: [Event Details]	9:00-10:00 AM: [Event Details]	9:00-10:00 AM: [Event Details]	9:00-10:00 AM: [Event Details]
9am	10:00-11:00 AM: [Event Details]	10:00-11:00 AM: [Event Details]	10:00-11:00 AM: [Event Details]	10:00-11:00 AM: [Event Details]	10:00-11:00 AM: [Event Details]	10:00-11:00 AM: [Event Details]	10:00-11:00 AM: [Event Details]
10am	11:00-12:00 PM: [Event Details]	11:00-12:00 PM: [Event Details]	11:00-12:00 PM: [Event Details]	11:00-12:00 PM: [Event Details]	11:00-12:00 PM: [Event Details]	11:00-12:00 PM: [Event Details]	11:00-12:00 PM: [Event Details]
11am	12:00-1:00 PM: [Event Details]	12:00-1:00 PM: [Event Details]	12:00-1:00 PM: [Event Details]	12:00-1:00 PM: [Event Details]	12:00-1:00 PM: [Event Details]	12:00-1:00 PM: [Event Details]	12:00-1:00 PM: [Event Details]
12pm	1:00-2:00 PM: [Event Details]	1:00-2:00 PM: [Event Details]	1:00-2:00 PM: [Event Details]	1:00-2:00 PM: [Event Details]	1:00-2:00 PM: [Event Details]	1:00-2:00 PM: [Event Details]	1:00-2:00 PM: [Event Details]
1pm	2:00-3:00 PM: [Event Details]	2:00-3:00 PM: [Event Details]	2:00-3:00 PM: [Event Details]	2:00-3:00 PM: [Event Details]	2:00-3:00 PM: [Event Details]	2:00-3:00 PM: [Event Details]	2:00-3:00 PM: [Event Details]
2pm	3:00-4:00 PM: [Event Details]	3:00-4:00 PM: [Event Details]	3:00-4:00 PM: [Event Details]	3:00-4:00 PM: [Event Details]	3:00-4:00 PM: [Event Details]	3:00-4:00 PM: [Event Details]	3:00-4:00 PM: [Event Details]

Print

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.



Reservation


Volunteer Reservation

Volunteer Lookup:  

Reservation Slot Times

Start Date: 04/06/2015 07:00 a End Date: 04/06/2015 08:00 a


Click on the magnifying glass  icon. The Available Volunteers Lookup form displays.




Available Volunteers Lookup

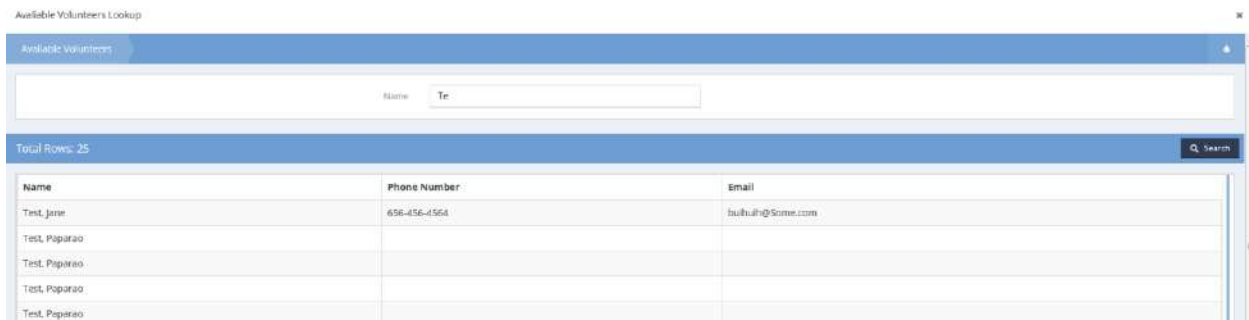
Available Volunteers

Name:

Total Rows: 206 

Name	Phone Number	Email
Test_jane	656-456-4564	bulhuhe@some.com
Voldon_jane105		jlope@myEcom.net
lBred_Cody	189-874-9654	bbinge@CaseWorthy.com


Enter any or all of the desired participant name and click on the  button. A list of matching participant names appears.



Available Volunteers Lookup

Available Volunteers

Name:  To:

Total Rows: 25 

Name	Phone Number	Email
Test_jane	656-456-4564	bulhuhe@some.com
Test_Poparao		
Test_Poparao		
Test_Poparao		
Test_Poparao		

Select the desired participant by clicking on the row. The name now appears on the Reservation form.



Reservation

Volunteer Reservation

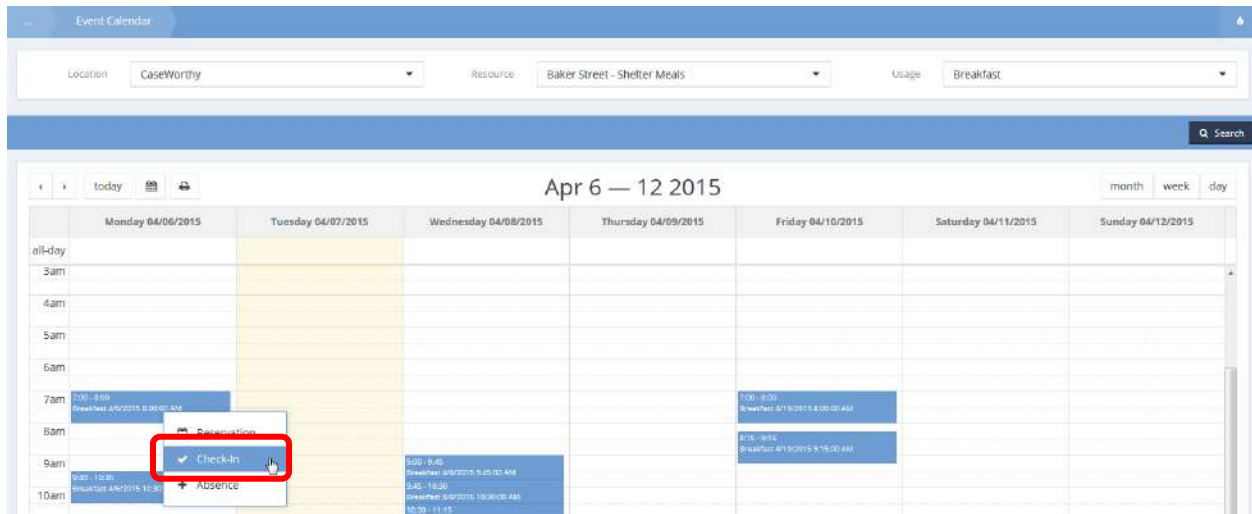
Volunteer Lookup: Test\_jane 

Reservation Slot Times

Start Date: 04/06/2015 07:00 a End Date: 04/06/2015 08:00 a

Click on the  button.

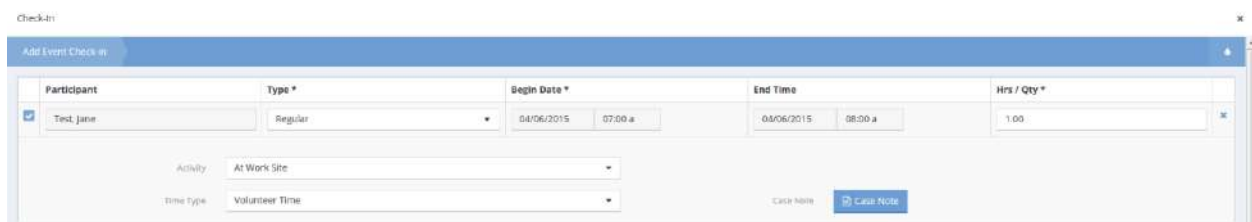
To check in a participant, select Check-In from the pop up menu.



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  button.



## Group Volunteers

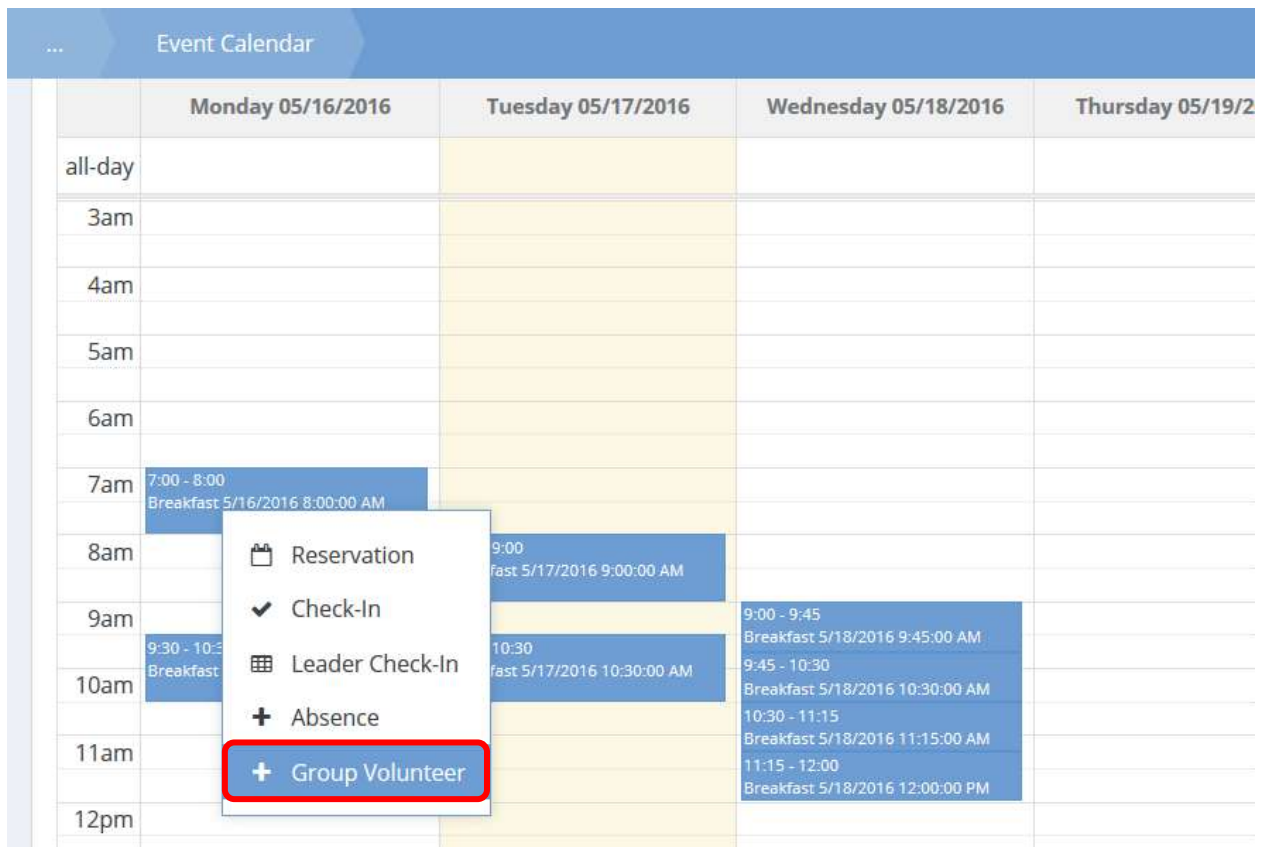
The Event Calendar form displays.

The screenshot shows the 'Event Calendar' form. At the top, there is a blue header bar with the text 'Event Calendar' and a small icon. Below this, there is a search bar with a magnifying glass icon and the word 'Search'. The search bar is divided into three sections: 'Location \*', 'Resource \*', and 'Usage \*'. The 'Location \*' section has a dropdown menu with 'CaseWorthy' selected. The 'Resource \*' and 'Usage \*' sections have empty dropdown menus. A red rectangle highlights the search bar and the filter sections.

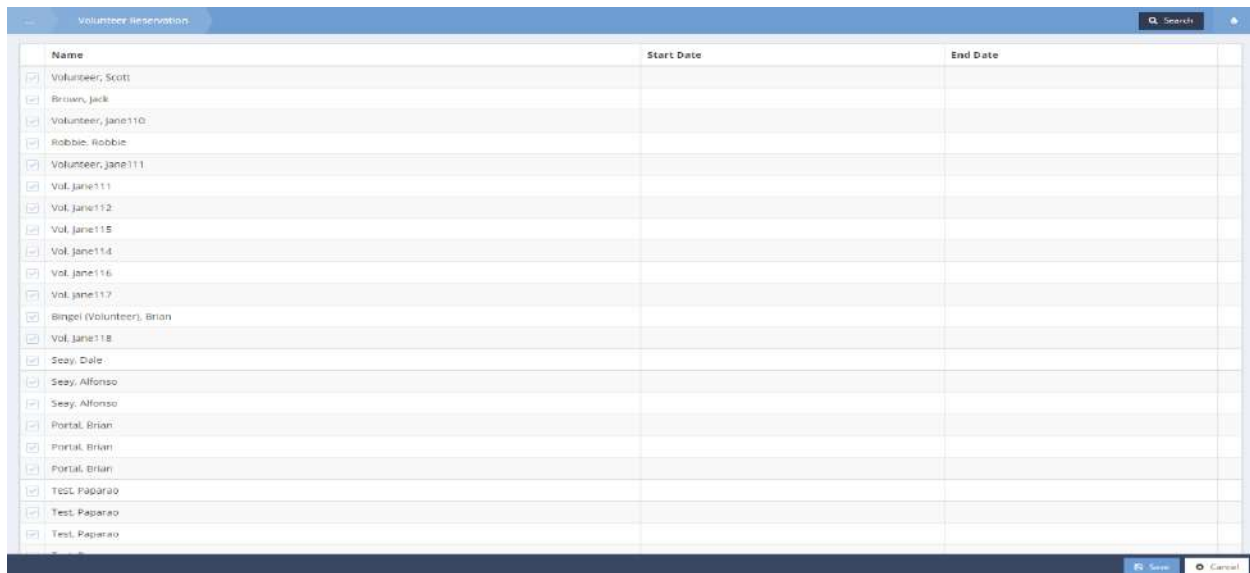
Select a Location, Resource, and Usage from the drop-down menus and click the  Search button to populate results.

The screenshot shows the 'Event Calendar' form with the search results populated. The search bar at the top shows 'Location \* CaseWorthy', 'Resource \* Meta Event', and 'Usage \* Breakfast'. Below the search bar, there is a calendar view for the week of May 16-22, 2016. The calendar is a grid with days of the week as columns and times of the day as rows. Events are shown as blue blocks with text indicating the event name and time. A red rectangle highlights the event 'Breakfast 5/16/2016 8:30:00 AM' on Monday, May 16, 2016. The calendar view includes navigation buttons for 'today', 'month', 'week', and 'day'.

Click on desired event and select Group Volunteer from the menu options.

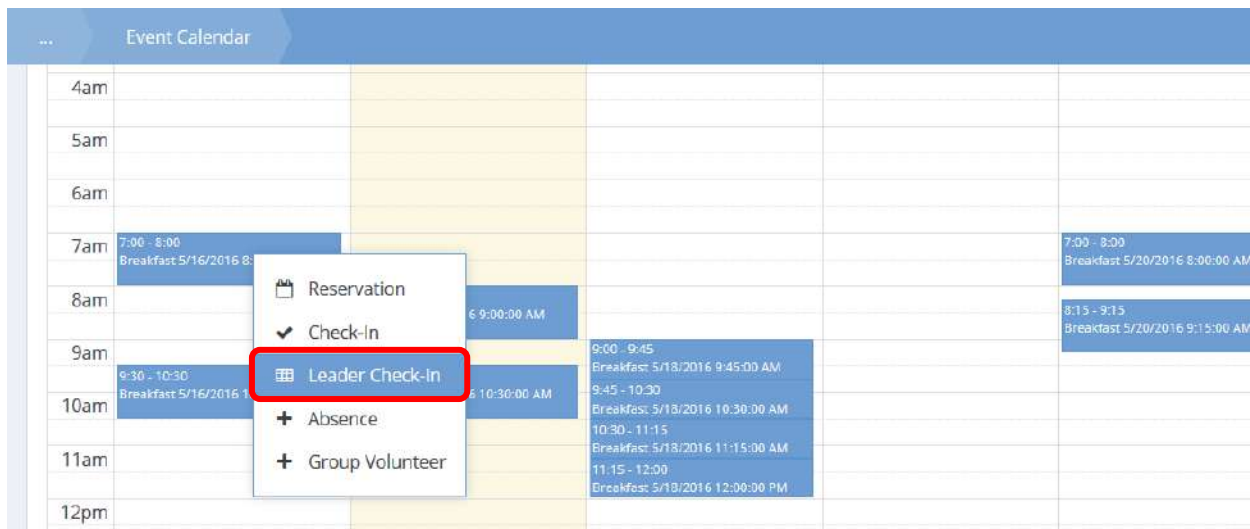


The Volunteer Reservation form displays.



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 *
<input checked="" type="checkbox"/> Seay, Isabella	Regular	2/24/2014 10:00 AM	2/24/2014 2:00 PM	4.00
<input type="checkbox"/> Volunteer101, Jane				0.00
<input checked="" type="checkbox"/> Volunteer101, Jane	Regular	8/4/2014 10:00 AM	8/4/2014 2:00 PM	4.00
<input type="checkbox"/> Volunteer104, Jane				0.00
<input type="checkbox"/> Vol115, Jane				0.00
<input type="checkbox"/> Vol110, Jane				0.00
<input type="checkbox"/> Vol201, Jane				0.00
<input checked="" type="checkbox"/> Seay, Isabella	Regular	2/24/2014 10:00 AM	2/24/2014 2:00 PM	4.00
<input type="checkbox"/> Volunteer101, Jane				0.00
<input checked="" type="checkbox"/> Volunteer101, Jane	Regular	8/4/2014 10:00 AM	8/4/2014 2:00 PM	4.00
<input type="checkbox"/> Volunteer104, Jane				0.00
<input type="checkbox"/> Vol115, Jane				0.00
<input type="checkbox"/> Vol110, Jane				0.00
<input type="checkbox"/> Vol201, Jane				0.00
<input checked="" type="checkbox"/> Seay, Isabella	Regular	2/24/2014 10:00 AM	2/24/2014 2:00 PM	4.00
<input type="checkbox"/> Volunteer101, Jane				0.00
<input checked="" type="checkbox"/> Volunteer101, Jane	Regular	8/4/2014 10:00 AM	8/4/2014 2:00 PM	4.00
<input type="checkbox"/> Volunteer104, Jane				0.00
<input type="checkbox"/> Vol115, Jane				0.00
<input type="checkbox"/> Vol110, Jane				0.00
<input type="checkbox"/> 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.

CaseWorthy™	Case Name	Case Type	Case Status	Case Date	Case Time
<input checked="" type="checkbox"/>	Henry, Henrietta				0.00
<input checked="" type="checkbox"/>	Seay, Arthur				0.00
<input checked="" type="checkbox"/>	Dawson, Jack				0.00
<input checked="" type="checkbox"/>	Specialist, Documentation	Regular		12:00 a	12:00 a
Activity: At Work Site					
Time Type: Volunteer Time					
Case Note: <a href="#">Case Note</a>					
<input checked="" type="checkbox"/>	Seay, Alfonso				0.00
<input checked="" type="checkbox"/>	Seay, Dale				0.00
<input checked="" type="checkbox"/>	Gutierrez, Mariel				0.00
<input checked="" type="checkbox"/>	Seay, Isabella				0.00

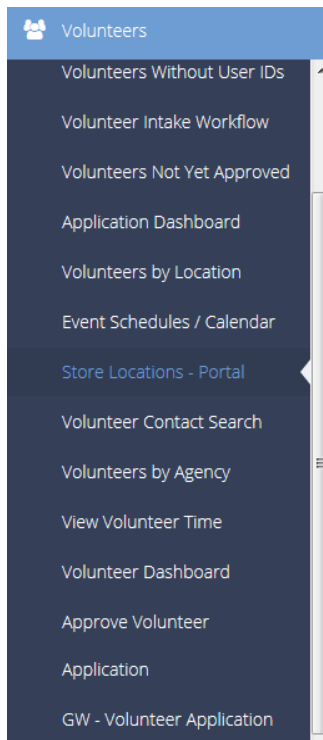
Enter information as desired. Click the [Save](#) button to save and exit.



## 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.

Providers - Store Locations

Map: [View Map of Store Locations](#)

Total Rows: 7

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.

Providers - Store Locations

Map: [View Map of Store Locations](#)

Total: 6

- Edit
- Resources
- HMIS Setup
- Program
- Services
- Scan Card Services
- Provider Release
- Property
- Test Provider

Provider Type Category	City	Phone	Latitude	Longitude
Store Location	740 East 3900 South, Salt Lake City, UT 84107	801-888-9999	40.68	-111.87
Store Location	123 South Main Street, Salt Lake City, UT 84111	801-555-1212	40.76	-111.89
Store Location	740 East 3900 South, Salt Lake City, UT 84107	801-555-1212	40.68	-111.87
Store Location	2751 East 4500 South, Salt Lake City, UT 84124	801-555-1122	40.67	-111.81
Store Location	123 South, SAINT LOUIS, MO 63128		0	0
Store Location	123 Fake Street, SCHENECTADY, NY 12345		42.81	-73.9814578

To map the store locations, click on the [View Map of Store Locations](#) button.

A new window opens with a map of the locations on the list.

dev.caseworthy.com/CaseWorthy/Map.aspx

Start:  End:  Map Satellite

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.

Start: Goodwill - 39th Street End: Test Provider

Map Satellite

731-753 East 4200 South, Millcreek, UT 84107, USA

2,178 mi - about 1 day 7 hours

1. Head west on E 4200 S toward S 700 E 400 ft
2. Turn right onto UT-71 N/S 700 E 2.6 mi
3. Turn right to merge onto I-80 E 509 mi  
Passing through Wyoming  
Entering Nebraska
4. Keep right at the fork to stay on I-80 E 423 mi  
Entering Iowa
5. Keep left at the fork to stay on I-80 E 119 mi  
follow signs for Des Moines
6. Keep right at the fork to stay on I-80 E 166 mi  
E, follow signs for Interstate 35  
S/Kansas City
7. Take exit 290 for Interstate 280/US-6 0.6 mi  
E toward Rock Island/Moline
8. Continue onto I-280 E/US-6 E 26.8 mi  
Continue to follow I-280 E  
Entering Illinois
9. Continue onto I-80 E 145 mi  
Partial toll road

Click on Satellite and the image changes again.

Start: Goodwill - 39th Street End: Test Provider

Map Satellite

731-753 East 4200 South, Millcreek, UT 84107, USA

2,178 mi - about 1 day 7 hours

1. Head west on E 4200 S toward S 700 E 400 ft
2. Turn right onto UT-71 N/S 700 E 2.6 mi
3. Turn right to merge onto I-80 E 509 m  
Passing through Wyoming  
Entering Nebraska
4. Keep right at the fork to stay on I-80 E 423 m  
Entering Iowa
5. Keep left at the fork to stay on I-80 E 119 m  
follow signs for Des Moines
6. Keep right at the fork to stay on I-80 E 166 m  
E, follow signs for Interstate 35  
S/Kansas City
7. Take exit 290 for Interstate 280/US-6 0.6 mi  
E toward Rock Island/Moline
8. Continue onto I-280 E/US-6 E 26.8 m  
Continue to follow I-280 E  
Entering Illinois
9. Continue onto I-80 E 145 m  
Partial toll road



## Volunteer Contact Search

**Objective:** Search for a volunteer, view and edit volunteer contact info.

The screenshot shows the 'Volunteer Summary' form. At the top, there are two search filters: 'Volunteer Group' (a dropdown menu) and 'Last Name, First' (a text input field). Both are highlighted with a red rectangle. Below the filters, there is a 'Total Rows: 180' indicator and a 'Search' button. The main part of the form is a table listing volunteers with the following columns: Provider, Name, Email, User Name, Cell Phone, Volunteer Since Date, Last Login Date, User ID, and System ID. The table contains 18 rows of data, including volunteers from CaseWorthy and myecm.net.

Provider	Name	Email	User Name	Cell Phone	Volunteer Since Date	Last Login Date	User ID	System ID
CaseWorthy	WorkforceTest, Brian	bblingel@CaseWorthy.com	bblingel1008W		10/8/2014		8243	8243
CaseWorthy	Volunteer106, Jane	jtjoe@caseWorthy.com			8/11/2014		8056	8056
CaseWorthy	Volunteer105, Jane	jtjoe@caseWorthy.com			8/8/2014		8048	8048
CaseWorthy	Volunteer104, Jane	jtjoe@caseWorthy.com			8/11/2014		8055	8055
CaseWorthy	Volunteer101, Jane	jtjoe@caseWorthy.com	janeV101		8/8/2014		8049	8049
CaseWorthy	Volunteer, Test	dseay@myecm.net			1/10/2014		4338	4338
CaseWorthy	Volunteer, Test	dseay@myecm.net	testv		1/10/2014		4339	4339
CaseWorthy	Volunteer, Scott		volscott		8/21/2013		4172	4172

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.

This screenshot shows the same 'Volunteer Summary' form, but with the 'Edit' action menu open for the first volunteer, 'WorkforceTest, Brian'. The menu is highlighted with a red rectangle and contains the following options: Calendar, Application, Entity Issue, Volunteer Schedule List, Demographic, Credentials, Agreement, and Delete. The table below the menu shows the same list of volunteers as the previous screenshot.

Provider	Name	Email	User Name	Cell Phone	Volunteer Since Date	Last Login Date	User ID	System ID
CaseWorthy	WorkforceTest, Brian	bblingel@CaseWorthy.com	bblingel1008W		10/8/2014		8243	8243
CaseWorthy	Volunteer106, Jane	jtjoe@caseWorthy.com			8/11/2014		8056	8056
CaseWorthy	Volunteer105, Jane	jtjoe@caseWorthy.com			8/8/2014		8048	8048
CaseWorthy	Volunteer104, Jane	jtjoe@caseWorthy.com			8/11/2014		8055	8055
CaseWorthy	Volunteer101, Jane	jtjoe@caseWorthy.com	janeV101		8/8/2014		8049	8049
CaseWorthy	Volunteer, Test	dseay@myecm.net			1/10/2014		4338	4338
CaseWorthy	Volunteer, Test	dseay@myecm.net	testv		1/10/2014		4339	4339
CaseWorthy	Volunteer, Scott		volscott		8/21/2013		4172	4172
CaseWorthy	Volunteer, Meg	bblingel@caseworthy.com			8/7/2014		8042	8042
CaseWorthy	Volunteer, Jane111	jtjoe@CaseWorthy.com	jane111vol	454-544-8484	9/17/2013		4214	4214
CaseWorthy	Volunteer, Jane110		jane110		9/16/2013	12/30/2014	4208	4208
CaseWorthy	Volunteer, Jane106	jtjoe@myEcm.net	jane106		6/6/2013		4008	4008
CaseWorthy	Vol777, Jane	janeVol777@yahoo.com			11/13/2014		8517	8517
CaseWorthy	Vol669, Jane		voljane9		12/3/2014		9708	9708
CaseWorthy	Vol668, Jane	jtjoe@caseWorthy.com			12/2/2014		9696	9696

The Edit Contacts – Entity as Volunteer form displays.

**Edit Contacts - Entity As Volunteer**

Email:   
 Confirm Email:

**Address Information**

Address1:  Address2:   
 ZipCode:    
 City:  State:

**DEMOGRAPHIC INFORMATION (Optional—Voluntary Disclosure)**

Gender:   
 Birth Date:    
 Ethnicity:   
 SSN:    
 Age:   
 Veteran Status:

**Disability (choose all that apply):**

Disabilities:

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.

**Add New Contacts - Entity As Volunteer**

**Volunteer Name and Contact Information**

First Name:  Last Name:   
 Primary Phone:   Primary Number:   
 Secondary Phone:   Secondary Number:   
 Email:   
 Confirm Email:

**Address Information**

Address1:  Address2:

**DEMOGRAPHIC INFORMATION (Optional—Voluntary Disclosure)**

Gender:   
 Birth Date:    
 Ethnicity:   
 SSN:    
 Age:   
 Veteran Status:

**Disability (choose all that apply):**

Disabilities:

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.

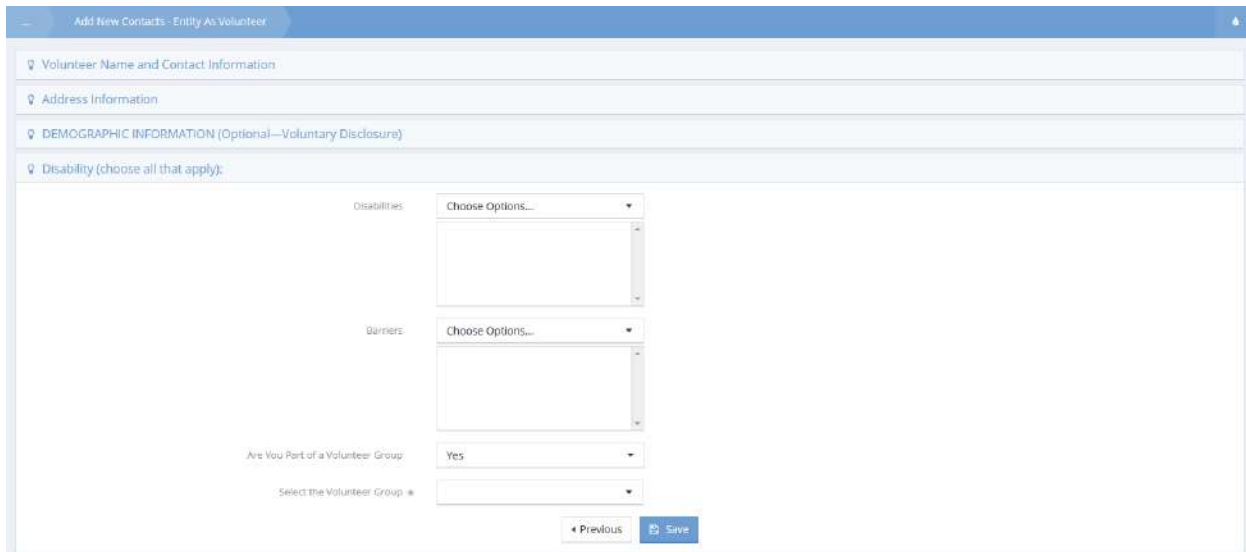
The screenshot shows the 'Add New Contacts - Entity As Volunteer' form. The 'Address Information' section is active, displaying input fields for Address1, Address2, zipCode, City, and State. A 'Verify Address' button, highlighted with a red rectangle, is located below the zipCode field. Navigation buttons '◀ Previous' and 'Next ▶' are at the bottom right of the section. Below this section are two optional sections: 'DEMOGRAPHIC INFORMATION (Optional—Voluntary Disclosure)' and 'Disability (choose all that apply):'.


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.

The screenshot shows the 'Add New Contacts - Entity As Volunteer' form, now on the 'DEMOGRAPHIC INFORMATION (Optional—Voluntary Disclosure)' section. It contains input fields for Gender, Birth Date, Ethnicity, SSN, Age, and Veteran Status. The SSN field has a dropdown menu set to 'Full'. Navigation buttons '◀ Previous' and 'Next ▶' are at the bottom right of the section. Below this section is the 'Disability (choose all that apply):' section.

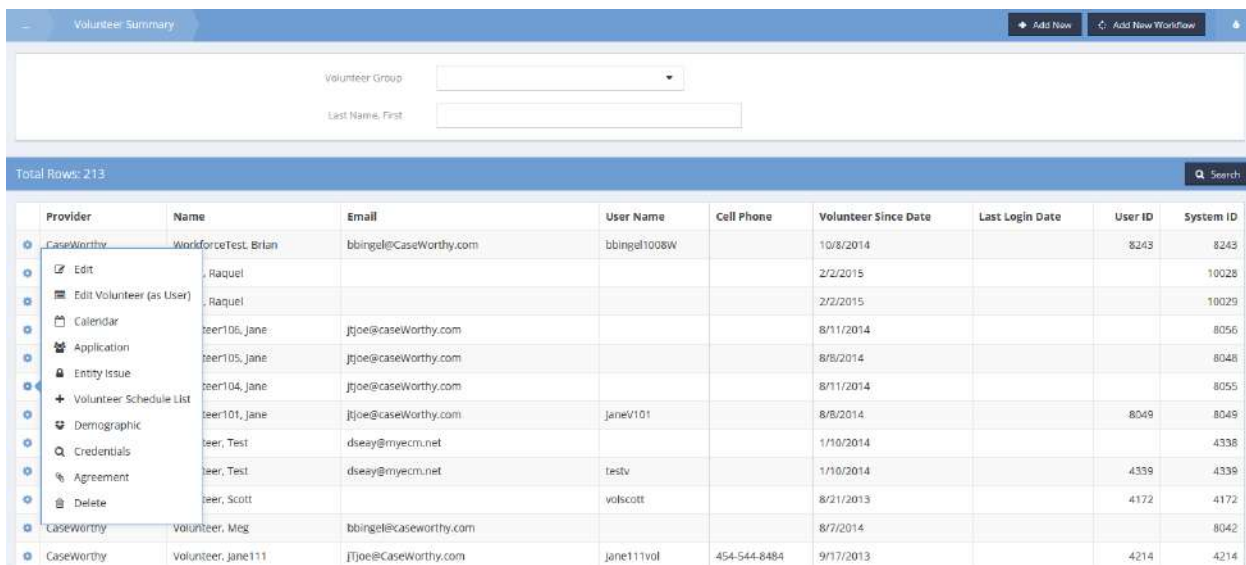
Demographic information is voluntary. If desired, enter the volunteer's gender, date of birth, social security number, ethnicity, and veteran status of the volunteer.

Click  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  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.

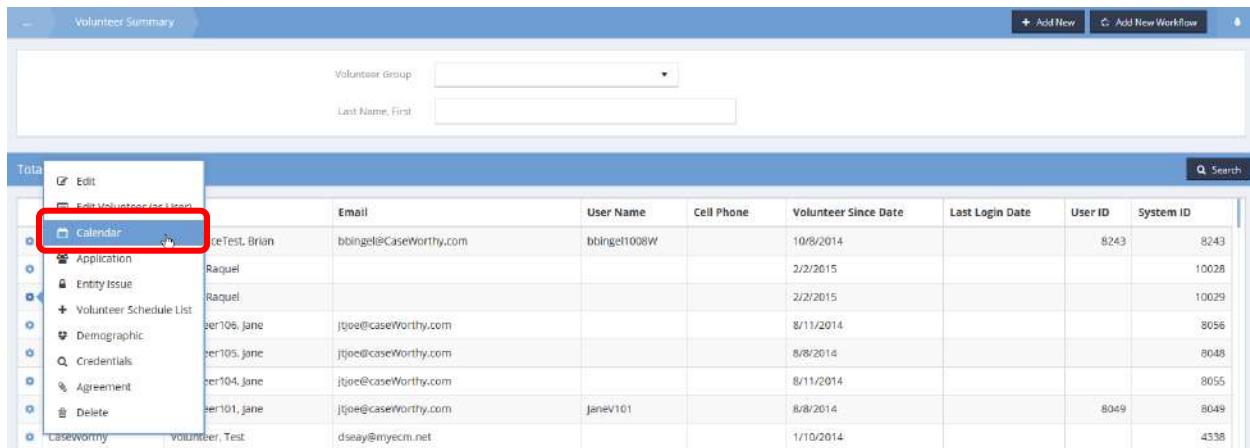


Provider	Name	Email	User Name	Cell Phone	Volunteer Since Date	Last Login Date	User ID	System ID
CaseWorthy	WorkforceTest, Brian	bbingel@CaseWorthy.com	bbingel1008W		10/8/2014		8243	8243
	Raquel				2/2/2015			10028
	Raquel				2/2/2015			10029
	teer105, Jane	jtjoe@caseWorthy.com			8/11/2014			8056
	teer105, Jane	jtjoe@caseWorthy.com			8/8/2014			8048
	teer104, Jane	jtjoe@caseWorthy.com			8/11/2014			8055
	teer101, Jane	jtjoe@caseWorthy.com	janeV101		8/8/2014		8049	8049
	teer, Test	dseay@myecm.net			1/10/2014			4338
	teer, Test	dseay@myecm.net	testv		1/10/2014		4339	4339
	teer, Scott		volscott		8/21/2013		4172	4172
CaseWorthy	Volunteer, Meg	bbingel@Caseworthy.com			8/7/2014			8042
CaseWorthy	Volunteer, Jane111	jtjoe@CaseWorthy.com	jane111vol	454-544-8484	9/17/2013		4214	4214




## Calendar

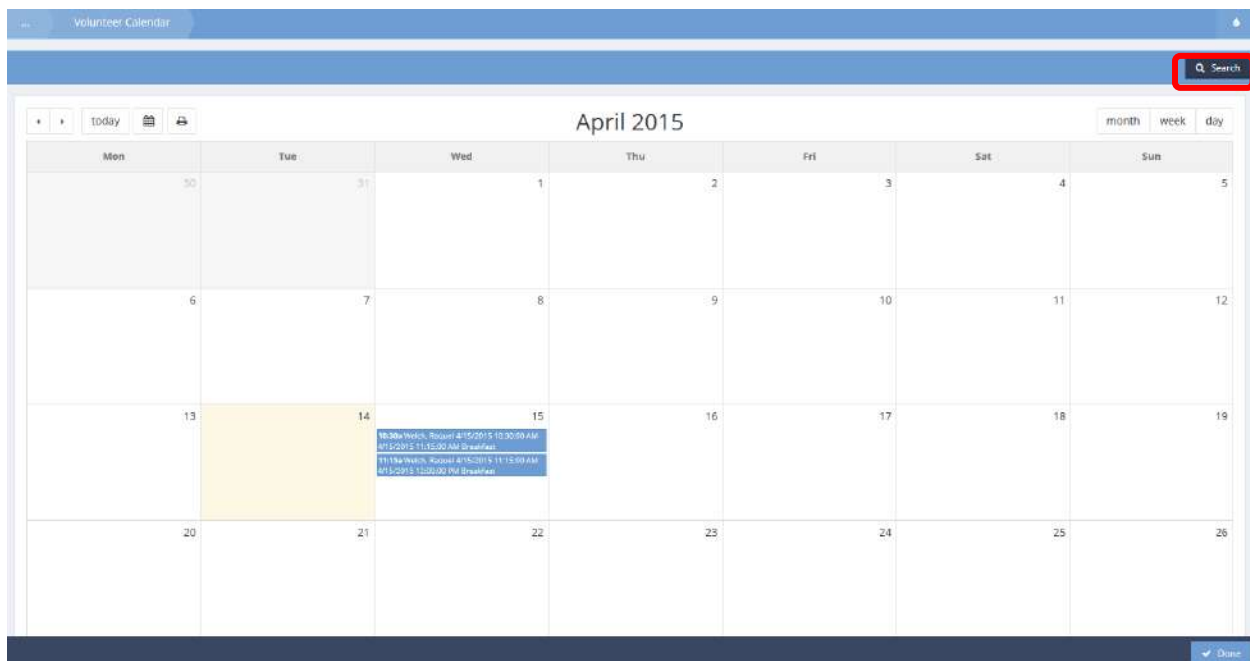
To view a calendar specific to an individual volunteer, locate the desired volunteer and click on the action gear  icon associated with it. Select Calendar from the pop-up menu that appears.



The screenshot shows the 'Volunteer Summary' page. At the top, there are fields for 'Volunteer Group' and 'Last Name, First'. Below these is a table of volunteers. The first volunteer, Brian, has a gear icon in the 'Action' column. A dropdown menu is open for this gear, and the 'Calendar' option is highlighted with a red box.

	Email	User Name	Cell Phone	Volunteer Since Date	Last Login Date	User ID	System ID
ceTest, Brian	bbinge@CaseWorthy.com	bbinge1008W		10/8/2014		8243	8243
Raquel				2/2/2015			10028
Raquel				2/2/2015			10029
er106, Jane	jtooe@CaseWorthy.com			8/11/2014			8056
er105, Jane	jtooe@CaseWorthy.com			8/8/2014			8048
er104, Jane	jtooe@CaseWorthy.com			8/11/2014			8055
er101, Jane	jtooe@CaseWorthy.com	JaneV101		8/8/2014		8049	8049
Caseworthy, Volunteer, Test	dseay@myecm.net			1/10/2014			4338

The Volunteer Calendar form displays. Enter the desired date range and click on the  button. The calendar displays any time served by the volunteer within the entered date range.



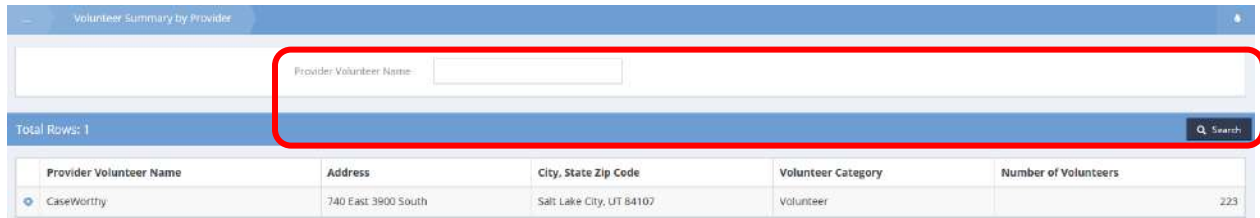
The screenshot shows the 'Volunteer Calendar' page for April 2015. The calendar grid displays days from Monday to Sunday. A yellow highlight is on Tuesday, April 14th, and a blue highlight is on Wednesday, April 15th. The 'Search' button in the top right corner is highlighted with a red box.

Mon	Tue	Wed	Thu	Fri	Sat	Sun
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26

## Volunteers by Agency

The Volunteer Summary by Provider form allows volunteer information to be viewed specific to providers.

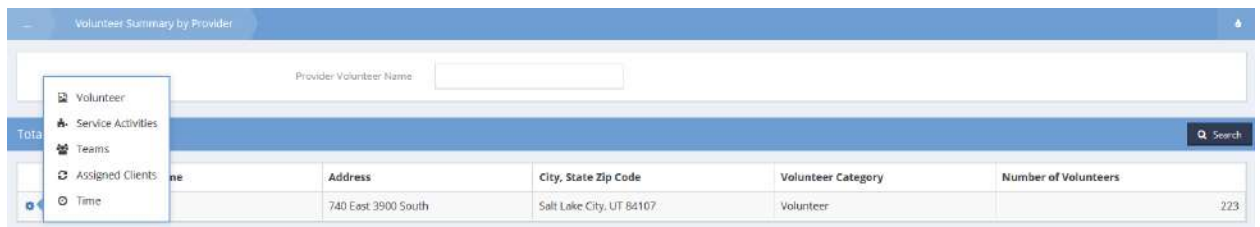
The search bar can be used to filter providers by name.



The screenshot shows the 'Volunteer Summary by Provider' form. A red rectangular box highlights the search bar area, which includes a text input field labeled 'Provider Volunteer Name' and a 'Search' button. Below the search bar, the text 'Total Rows: 1' is visible. The table below the search bar contains one row of data for 'CaseWorthy'.

Provider Volunteer Name	Address	City, State Zip Code	Volunteer Category	Number of Volunteers
CaseWorthy	740 East 3900 South	Salt Lake City, UT 84107	Volunteer	223

Summaries of volunteers, service activities, teams, assigned clients, and time may all be accessed through the relevant menu items.



The screenshot shows the 'Volunteer Summary by Provider' form with a dropdown menu open on the left side. The menu items are: Volunteer, Service Activities, Teams, Assigned Clients, and Time. The search bar and table are visible in the background.

Provider Volunteer Name	Address	City, State Zip Code	Volunteer Category	Number of Volunteers
CaseWorthy	740 East 3900 South	Salt Lake City, UT 84107	Volunteer	223

## View Volunteer Time

**Objective:** View volunteer hours by volunteer.

**Navigation:** Organization>Volunteers>View Volunteer Time

The Calendar Event Time form displays

Calendar Event Time

Date Range: 09/29/2016 through 09/29/2016

Location:


Resource:

Volunteer:  Search

Total Rows: 0 Search

Location	Resource	Volunteer	Event	Created Date	Start - End Time	Volunteer Time (Hrs)
----------	----------	-----------	-------	--------------	------------------	----------------------

Done

Use the Volunteer lookup  field to select a volunteer for whom to view time. The Find Volunteer form displays.


Find Volunteer Lookup

Find Volunteer: Add New

Name:

Birth Date:

Search

Search by volunteer name or birthdate or simply click the  Search button to populate all results.

Find Volunteer Lookup X

---

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	bbingel	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	Alfonso	Alfonso	Seay	4225	9/1/1966	1
Porter, 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.

Volunteer Summary									
<div> <div>Volunteer Group</div> <div> <div>Last Name, First</div> <div>User Name</div> </div> </div>									
Total Rows: 251									
Provider	Name	Email	Cell Phone	Volunteer Since Date	Last Login Date	User Name	User ID	System ID	
CaseWorthy	Williams, Tilly	email@email.com	111-111-1111	6/8/2015				11692	
Catholic Charities	Wild, Brook			1/5/2016				12810	
CaseWorthy	White, Brenda			7/19/2016				14453	
CaseWorthy	Welch, Raquel			2/2/2015				10028	
CaseWorthy	Welch, Raquel			2/2/2015				10029	
CaseWorthy	Volunteer106, Jane	jtjoe@caseWorthy.com		8/11/2014				8056	
CaseWorthy	Volunteer105, Jane	jtjoe@caseWorthy.com		8/8/2014				8048	
CaseWorthy	Volunteer104, Jane	jtjoe@caseWorthy.com		8/11/2014				8055	
CaseWorthy	Volunteer104, Jane	jtjoe@caseWorthy.com		8/11/2014				8055	
CaseWorthy	Volunteer101, Jane	jtjoe@caseWorthy.com		8/8/2014		janev101	8049	8049	
CaseWorthy	Volunteer, Test	dseay@myecm.net		1/10/2014				4338	
CaseWorthy	Volunteer, Test	dseay@myecm.net		1/10/2014		testv	4339	4339	
CaseWorthy	Volunteer, Test	dseay@myecm.net		1/10/2014		testv	4339	4339	
CaseWorthy	Volunteer, Test	dseay@myecm.net		1/10/2014		testv	4339	4339	
CaseWorthy	Volunteer, Test	dseay@myecm.net		1/10/2014		testv	4339	4339	

Click the action gear  icon associated with the desired volunteer and select Volunteer Contact Log from the menu options.

Total Rows: 251					
Provider	Name	Email	Cell Phone	Volunteer Since Date	
CaseWorthy	Williams, Tilly	email@email.com	111-111-1111	6/8/2015	
	Brook			1/5/2016	
	Brenda			7/19/2016	
	, Raquel			2/2/2015	
	, Raquel			2/2/2015	
	teer106, Jane	jtjoe@caseWorthy.com		8/11/2014	
	teer105, Jane	jtjoe@caseWorthy.com		8/8/2014	

The Contact Log form displays existing contact information for the volunteer.

The screenshot shows the 'Contact Log' form. At the top right is a '+ Add Row' button. Below it is a table with three columns: 'Contact Date \*', 'Reason For Contact', and 'Status'. The first row has a checked checkbox, the date '9/29/2016', 'Professional partnership/development', and 'Contact later with volunteer position details'. The second row has a checked checkbox, the date '9/29/2016', 'Recruitment', and 'Has been emailed'. At the bottom right are 'Save' and 'Cancel' buttons.

Contact Date *	Reason For Contact	Status
<input checked="" type="checkbox"/> 9/29/2016	Professional partnership/development	Contact later with volunteer position details
<input checked="" type="checkbox"/> 9/29/2016	Recruitment	Has been emailed

To add additional contact information, click the **+ Add Row** button. A new row appears.

The screenshot shows the 'Contact Log' form with a new row added at the top. This row is expanded for editing, showing a date picker for '09/29/2016', a dropdown for 'Reason For Contact', a dropdown for 'Status', and a large text area for 'Notes'. Below this expanded row are the two rows from the previous screenshot. The '+ Add Row' button is still at the top right, and 'Save' and 'Cancel' buttons are at the bottom right.

Contact Date *	Reason For Contact	Status
<input checked="" type="checkbox"/> 09/29/2016		
<input checked="" type="checkbox"/> 9/29/2016	Professional partnership/development	Contact later with volunteer position details
<input checked="" type="checkbox"/> 9/29/2016	Recruitment	Has been emailed

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 **Save** 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				
	Request Date	Volunteer	Volunteer Application	Discussion Threads
	12/24/2014 9:46 AM	Claus, Santa	<a href="#">Volunteer Application</a>	<a href="#">Discussion Threads</a>
	12/18/2014 4:04 PM	Austin, Steve	<a href="#">Volunteer Application</a>	<a href="#">Discussion Threads</a>
	12/18/2014 3:29 PM	Goose, Gery	<a href="#">Volunteer Application</a>	<a href="#">Discussion Threads</a>
	11/19/2014 10:53 AM	Test, Test	<a href="#">Volunteer Application</a>	<a href="#">Discussion Threads</a>
	11/19/2014 10:39 AM	Vol, Jane501	<a href="#">Volunteer Application</a>	<a href="#">Discussion Threads</a>
	11/19/2014 10:34 AM	Vol, Jane500	<a href="#">Volunteer Application</a>	<a href="#">Discussion Threads</a>

The row expands. Click **Volunteer Application** to open the application and make any changes.

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

Request Date	Volunteer	Volunteer Application	Discussion Threads
12/24/2014 9:46 a	Claus, Santa	<b>Volunteer Application</b>	Discussion Threads
Status: Approved Email: emullin@caseworthy.com Volunteer Intake Created Date: 12/24/2014 Completion Deadline:			
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
11/19/2014 10:01 AM	Arden, Eldredge	Volunteer Application	Discussion Threads

Save Cancel

The Volunteer Application form displays.

Volunteer Application

Basic Info

Begin Date: 12/24/2014  
 Emergency Contact: Mrs. Claus  
 Emergency Contact Phone:  
 Check this box if you are a convicted felon:

Work with Goodwill

Check this box if you have worked with us before:  
 Reason for volunteering?: a school requirement?  
 School Name: Test  
 Reason for Hours:

Completion Information

Hours to Complete:  
 Completion Deadline:  
 Status: New/Pending Approvals  
 Is a Letter Required Upon Completion:  
 From Email Address: emullin@caseworthy.com

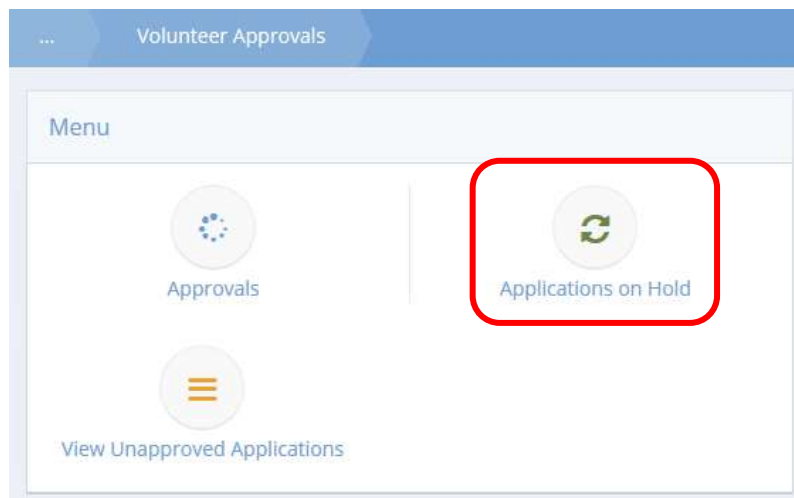
Save Cancel

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.

A screenshot of the 'Volunteer Applications on Hold' form. At the top, it says 'Total Rows: 3'. Below is a table with columns: 'Request Date', 'Volunteer', 'Volunteer Application', and 'Discussion Threads'. The first row is highlighted with a red box around the 'Request Date' column, which contains a blue checkbox icon. Below the table, there is a 'Status' dropdown menu, also highlighted with a red box. To the right of the status dropdown are fields for 'Intake Date' and 'Completion Deadline'. At the bottom, there are three rows of application data, each with a blue checkbox icon in the first column and a 'Discussion Threads' button in the last column. The first row is for 'Favre, Terry' with a 'Request Date' of '03/03/2015 09:39 a'. The second row is for 'Vallec, Rudy' with a 'Request Date' of '10/14/2014 8:40 AM'. The third row is for 'Volunteer105, Jane' with a 'Request Date' of '9/25/2014 6:00 PM'.

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  when finished.

## GW – Volunteer Application

**Objective:** Start a new volunteer application.

**Edit Volunteer Application**

**Basic Info**

Begin Date: 12/12/2014

Emergency Contact:

Emergency Contact Phone:

Have you ever been convicted of a felony? ☐

**Work with Goodwill**

Have you ever worked for this organization? ☐

Are you required to volunteer to satisfy:

**Completion Information**

Status: New/Pending Approvals

From Email Address:

**Save** **Cancel**

Fill out all required info, click **Save** when finished.

## Donors

### Find Donors


**Objective:** Add and view donor contact information.

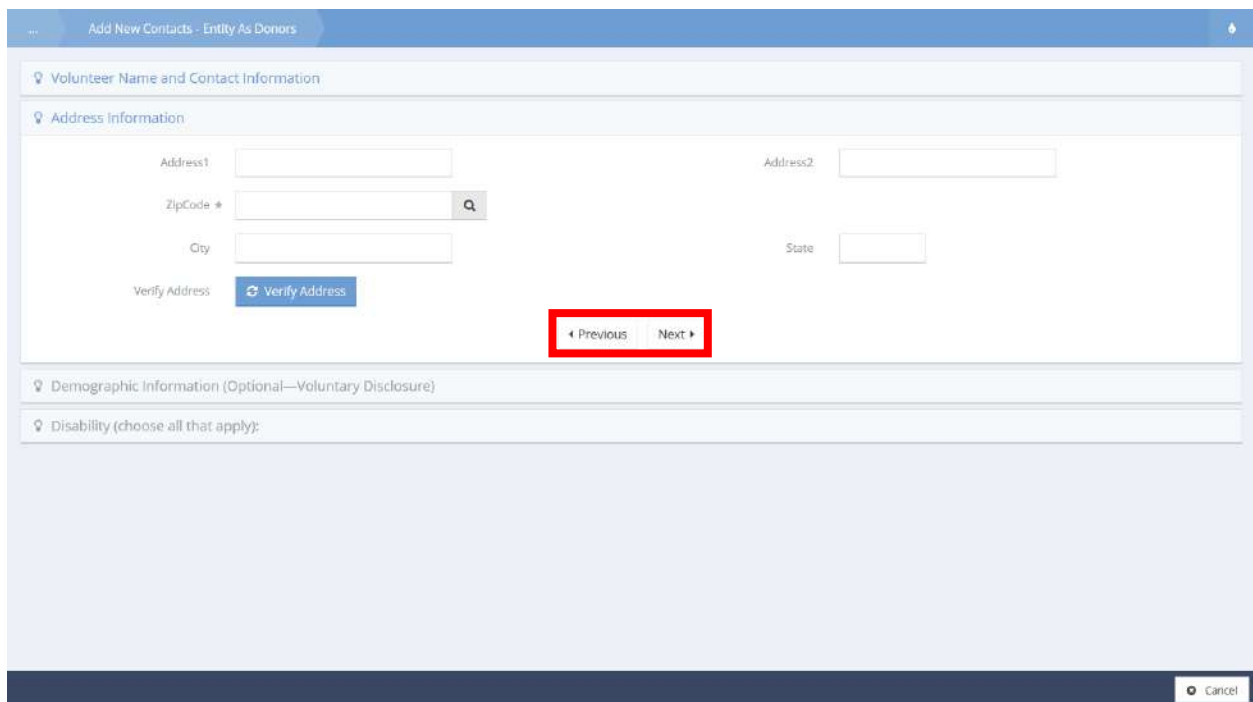
**Navigation:** Organization>Donors>Find Donors

Provider	Name	Email	Cell Phone	Donor Since Date	Last Login Date	User Name	User ID	System ID
CaseWorthy	Voldon, Jane106	jtjoe@caseWorthy.com		6/6/2013		Jane106	4008	4008
! Sample Provider	User, Sample, Sample			7/15/2016				14420
CaseWorthy	test, Volunteer			7/19/2016				14462
Test Provider	Test, Test2			12/2/2014				9678
CaseWorthy	Test, Brody			7/19/2016				14440
CaseWorthy	Temporary			6/12/2013				4031
CaseWorthy	Smith, Harry	Hsmith@myecm.net		6/14/2013				4067
Codey Davis	Scott, Codey	jtjoe@MyEcm.net		7/11/2013				4107

To add another contact entry, click the **+ Add New** 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  button.



Enter information into the required field ZipCode. Fill remaining fields as desired. To navigate between portions of the form, click the  or  button as applicable.

... Add New Contacts - Entity As Donors

Volunteer Name and Contact Information

Address Information

Demographic Information (Optional—Voluntary Disclosure)

Gender  SSN  Full

Birth Date  Age

Ethnicity  Veteran Status

◀ Previous Next ▶

Disability (choose all that apply):

Cancel

Fill fields as desired. Click the **Next ▶** button to continue and the **Save** button to finish.

... Add New Contacts - Entity As Donors

Volunteer Name and Contact Information

Address Information

Demographic Information (Optional—Voluntary Disclosure)

Disability (choose all that apply):

Disabilities Choose Options...

Barriers Choose Options...

Are You Part of a Volunteer Group No

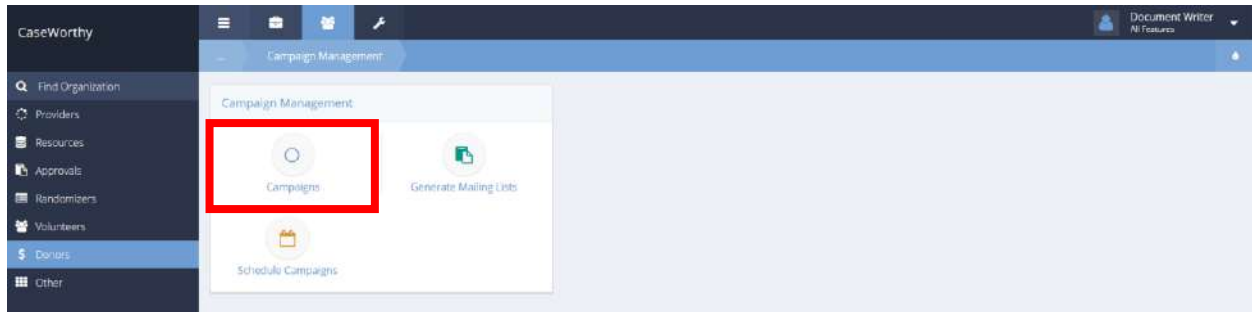
◀ Previous **Save**

Cancel

## Campaign Management

**Objective:** Add and manage new campaigns.

**Navigation:** Organization > Donors > Campaign Management



Select Campaign from the Campaign Management Dashboard. The Campaign Summary form displays.

Campaign Summary					
					+ Add New
Total Rows: 10					
	Created Date	Created By	Description	Template Subject	TemplateID
+	7/19/2016	Binks, Brody	1 Sample Campaign	Federal Resume - Lunch and Learn	100
+	6/27/2016	Horst, Thomas	Example Mailing	Campaign Test Template	95
+	6/16/2016	Horst, Thomas	Continuing Education Certificate	Campaign Test Template	95
+	2/23/2016	Bingel, Brian	11th Campaign List	Federal Resume - Lunch and Learn	100
+	2/23/2016	Bingel, Brian	9th Campaign Mailing Lists	Federal Resume - Lunch and Learn	100
+	2/23/2016	Bingel, Brian	8th Campaign List	Federal Resume - Lunch and Learn	100
+	2/23/2016	Bingel, Brian	7th Campaign List	Federal Resume - Lunch and Learn	100
+	2/23/2016	Tjoe, Jane	Jan Campaign	Campaign Test Template	95
+	2/23/2016	Bingel, Brian	My 5th Campaign List	Campaign Test Template	95
+	2/23/2016	Tjoe, Jane	Jane	Campaign Test Template	95
Done					

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

The Add Entity Mailing List form displays.

... Add Entity Mailing List

Description \*

Template \*

List Options \*

Search

Save Cancel

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.

Lookup Case Note Templates Lookup

Lookup Case Note Templates


Subject  Type

Total Rows: 2

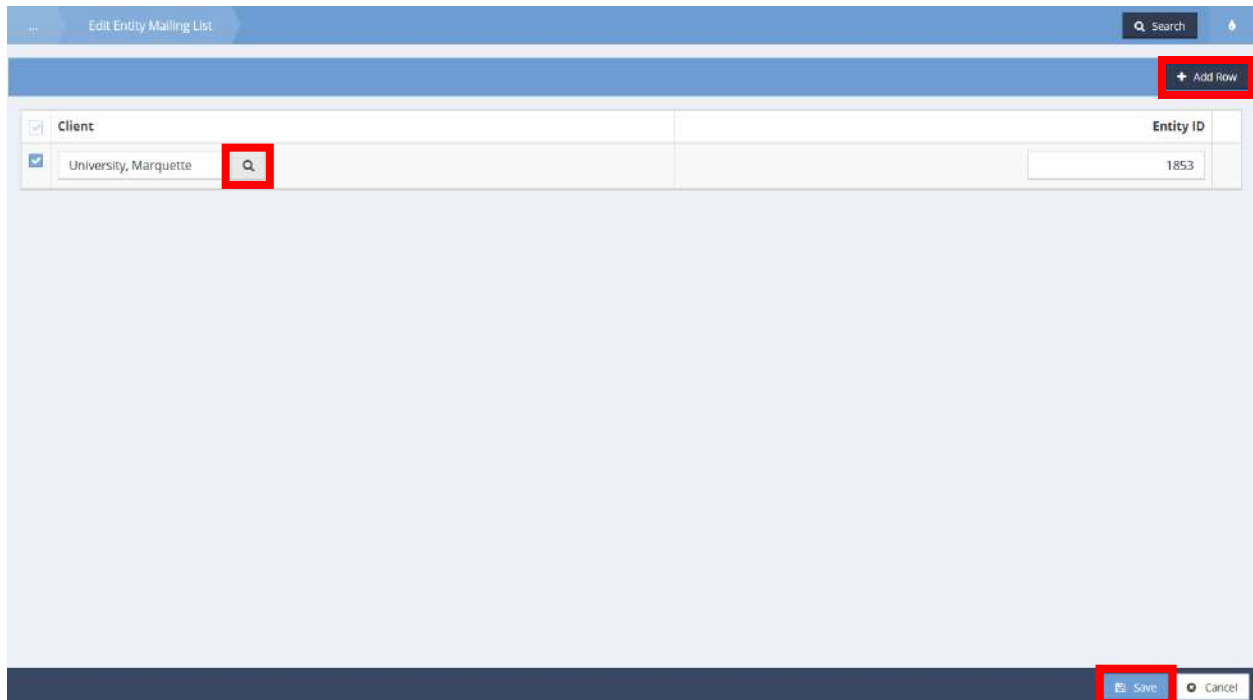
Subject	Type	Created Date	Template ID
Federal Resume - Lunch and Learn	Campaign	2/23/2016	100
Campaign Test Template	Campaign	10/12/2015	95

Done


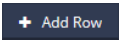

Search by Subject and/or Type. To add a new template, click the **+ Add New** button. Click on the desired line to select. The form closes upon selection.

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.



Client	Entity ID
University, Marquette	1853

Use the magnifying glass  icon to lookup a different client. Click the  button to add a new client to the mailing list. Click the  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.

Batch Invoice Service					+ Add New			
Search								
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  button. The Generate General Invoice form displays.

Generate General Invoice

Begin Date

05/17/2016

through

05/17/2016

Invoice Date \*

05/17/2016

Due Date \*

Description \*

Program

All

None

Choose Options...


Service

All

None

Choose Options...

Search

Enter information into required fields: Invoice Date, Due Date, and Description. Select a desired program and service. Click the  button to populate results of clients matching the date range and Program and Service selections.

Generate General Invoice

Begin Date: 05/17/2016 through 05/17/2016

Invoice Date: 05/17/2016 Due Date:

Description: \*

Program: All None Choose Options...

Service: All None Choose Options...


Total Rows: 9

Client	Description *	Program Name	Service	Bill Rate	Amount	Service Total
<input checked="" type="checkbox"/> Crow, Kevin		12 Permanent Housing for Homeless Disabled	Bed Night	2.0000	\$2.00	\$2.00
<input checked="" type="checkbox"/> Gaga, Man		12 Permanent Housing for Homeless Disabled	Bed Night	2.0000	\$2.00	\$2.00
<input checked="" type="checkbox"/> Gunn, Tommy		12 Permanent Housing for Homeless Disabled	Bed Night	2.0000	\$2.00	\$2.00
<input checked="" type="checkbox"/> Jordan, Fred		12 Permanent Housing for Homeless Disabled	Bed Night	2.0000	\$2.00	\$2.00
<input checked="" type="checkbox"/> Page, Turner		12 Permanent Housing for Homeless Disabled	Bed Night	2.0000	\$2.00	\$2.00
<input checked="" type="checkbox"/> Test, Jane1111		12 Permanent Housing for Homeless Disabled	Bed Night	2.0000	\$2.00	\$2.00

Save Cancel

A blue checkbox ☒ icon indicates selection. Click the blue checkbox ☒ icon to edit or delete from selection. The row expands.

Client	Description *	Program Name	Service	Bill Rate	Amount	Service Total
<input checked="" type="checkbox"/> Abbott, Rachel		_CEAP / Utility Assistance	Intake Service ASR	15.0000	\$15.00	\$15.00
<input checked="" type="checkbox"/> Abrahms, Abe	Test Batch	13 Safe Haven	Transitional Housing	0.00	0.00	0.00
<div> <div>InvoiceLine.ServiceID</div> <div>1237245</div> </div> <div> <div>InvoiceLine.EntityID</div> <div>8582</div> </div> <div> <div>InvoiceLine.Description</div> <div>Test Batch</div> </div> <div> <div>InvoiceLine.InvoiceHeaderID</div> <div>-1</div> </div> <div> <div>InvoiceLine.Quantity</div> <div>32.00</div> </div>						
<input checked="" type="checkbox"/> Abrahms, Abe		13 Safe Haven	Transitional Housing	0.0000	\$0.00	\$0.00
<input checked="" type="checkbox"/> Abrahms, Abe		13 Safe Haven	Transitional Housing	0.0000	\$0.00	\$0.00
<input checked="" type="checkbox"/> Abrahms, Abe		13 Safe Haven	Transitional Housing	0.0000	\$0.00	\$0.00

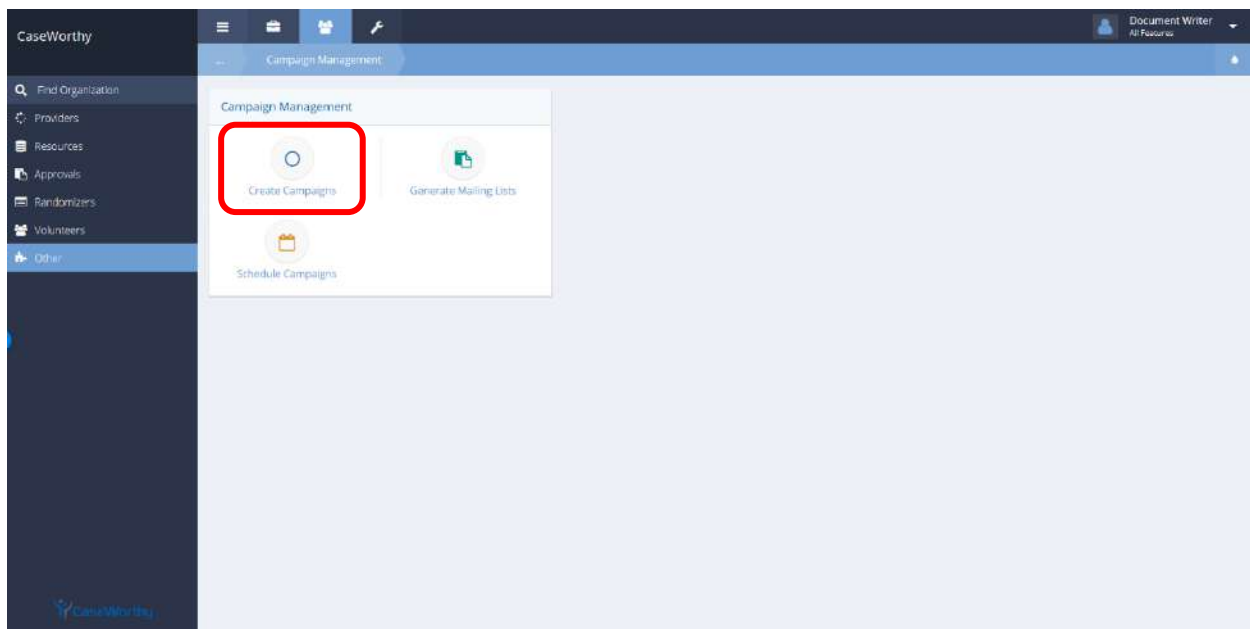
Enter information as desired. Click the  Save button to save and exit.

## 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.

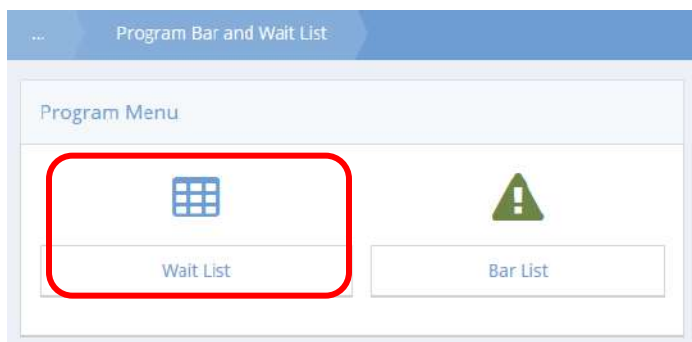
Campaign Summary					
					+ Add New
Total Rows: 1					
	Created Date	Created By	Description	Template Subject	TemplateID
⚙	10/12/2015	Bingel, Brian	Test Campaign Setup	Campaign Test Template	95

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.

Provider-Side Program Wait List by Program


Effective Date: 08/01/2014 To: 03/16/2015 Program Name: Isample prog (HIV)


Total Rows: 22 

Wait List Date	Effective Date	Program Name	Organization Name	Client	Case Note
2/18/2015	2/18/2015 6:56:00 AM	Isample prog (HIV)	CaseWorthy	Sexton, Martin	
2/18/2015	2/18/2015 6:56:00 AM	Isample prog (HIV)	Kingswood CAP	Sexton, Martin	
2/18/2015	2/18/2015 6:56:00 AM	Isample prog (HIV)	Catholic Charities	Sexton, Martin	
2/18/2015	2/18/2015 6:56:00 AM	Isample prog (HIV)	CCUSA Test	Sexton, Martin	
2/18/2015	2/18/2015 6:56:00 AM	Isample prog (HIV)	Obamacare Consultancy	Sexton, Martin	

Program Bar and Wait List

Program Menu

 Wait List


 Bar List


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.

Program Bar List Summary

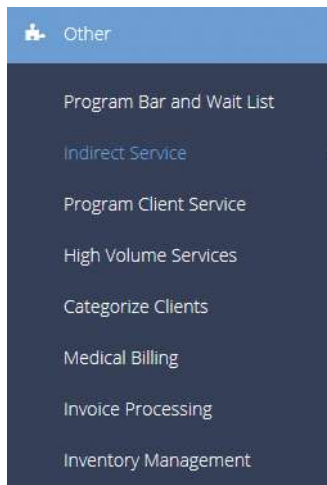
Program Name:  Bar active on date: 03/16/2015

Client Last Name:



Begin Date	End Date	Program Name	Client Name	Bar Reason	Case Note
12/4/2014	Present	2 YAGA	Wingsby, Martha	Drug Use/Selling/Possession	
11/24/2014	Present	SSVF	Test, TestMattServicePlan	CM - Failure to Comply	
11/7/2014	Present	SOH Family	Hill, Dusty	Disorderly/Refusing Test	
10/30/2014	Present	1 English for Employment	Beard, Frank	Threatening, Verbal	

## 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.

Indirect Service Summary

Add New


Service Date: 12/01/2014 to 03/16/2015

Total Rows: 8



Search

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


 Other


Program Bar and Wait List  
 Indirect Service  
 Program Client Service  
 High Volume Services  
 Categorize Clients  
 Medical Billing  
 Invoice Processing  
 Inventory Management


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  for a list of eligible clients. Click the clear checkbox  next to the client's name to provide the select service to them.

Program Client Service

User can only see clients on his/her assigned case load.

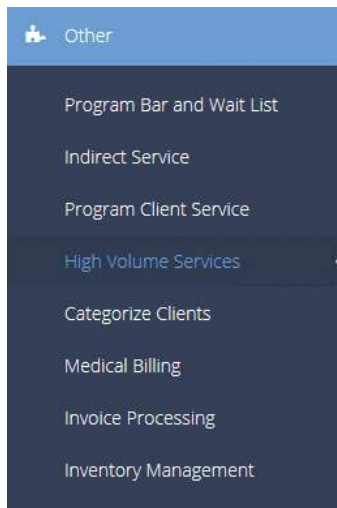
Service Date \* 03/11/2015  Qty \* 1 Unit Value \* 1  
 Program \* **1 English for Employment** Service \* AA Meeting Case Mpr   
 Method Of \* Face-To-Face Contact



<input type="checkbox"/>	Client Name	Member Enroll Begin	Unit Value	ServiceTotal	Restriction	Method Of Contact
<input checked="" type="checkbox"/>	Arden, Child	11/28/2012			Shared	Face-To-Face
Begin Date 03/11/2015 						
<input type="checkbox"/>	Arden, Steve	11/28/2012	1			
<input type="checkbox"/>	Arden, Ellie	10/31/2013	1			

## 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 **+ Add Row** button.

 A screenshot of the 'Add Services for High Volume Program' form. The form has a blue header bar with the title and a '+ Add Row' button on the right. Below the header, there are input fields for 'Service Date' (with a calendar icon), 'Method Of Contact' (a dropdown), 'Program' (a dropdown), and 'Service' (a dropdown). At the bottom, there is a table with columns: 'Client Look Up \*', 'Unit Of Measure', 'Unit Value \*', 'Units \*', and 'Service Total'. The '+ Add Row' button is highlighted with a red rectangle.


A new, expanded row appears on the form.

 A screenshot of the 'Add Services for High Volume Program' form, showing the state after a new row has been added. The 'Service Date' is now '01/05/2015', 'Program' is '09 Head Start', and 'Service' is 'AA Meeting'. The table at the bottom now has one row with data: 'Client Look Up \*' (with a magnifying glass icon highlighted by a red rectangle), 'Unit Of Measure' (empty), 'Unit Value \*' (0.26), 'Units \*' (1), and 'Service Total' (0.26). The '+ Add Row' button is still visible in the top right.

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  Search button.

A list of matching clients appears.

Client Name	Program Begin - End Dates	Enrollment ID
Cliente, Nuevo	12/19/2014 - Present	9925

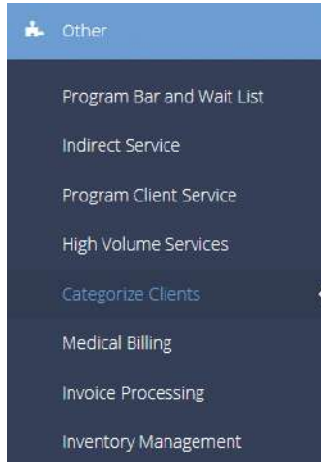
Select the client from the results. The Add Services for High Volume Program form displays with client name in the new row.


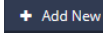
Client Look Up *	Unit Of Measure	Unit Value *	Units *	Service Total
<input checked="" type="checkbox"/> Cliente, Nuevo 		0.26	1	0.26

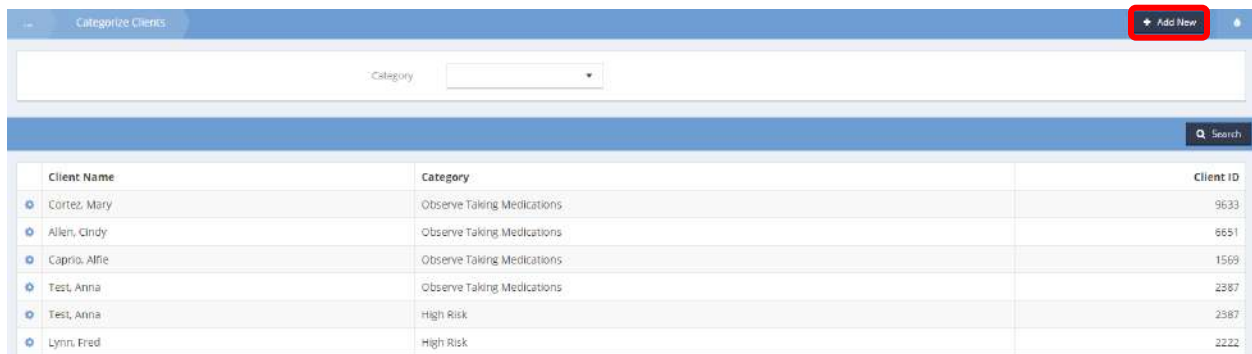
Add as many clients as desired by repeating the process. Click  Save when finished.

## Categorize Clients

**Objective:** Categorize clients, edit client categories, and find clients in a program.



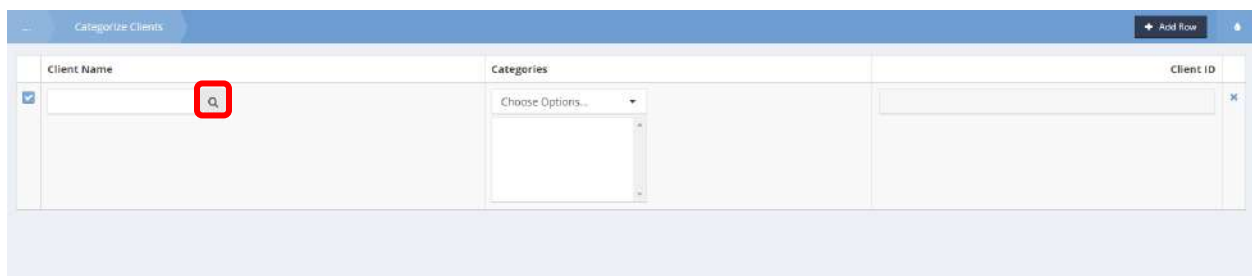
On the Categorize Clients form, choose a category from the drop-down list and click on the  Search button. The list of clients in that category appears. To add a client to the list, click the  Add New button.



The screenshot shows the 'Categorize Clients' form. At the top, there is a blue header bar with a search icon and the text 'Categorize Clients'. Below the header, there is a search bar with a magnifying glass icon and the word 'Search'. Underneath the search bar, there is a dropdown menu labeled 'Category'. Below the dropdown, there is a table with three columns: 'Client Name', 'Category', and 'Client ID'. The table contains six rows of client data.


Client Name	Category	Client ID
Cortez, Mary	Observe Taking Medications	9633
Allen, Cindy	Observe Taking Medications	6651
Caprio, Albie	Observe Taking Medications	1569
Test, Anna	Observe Taking Medications	2387
Test, Anna	High Risk	2387
Lynn, Fred	High Risk	2222


The list closes and an expanded row appears.



The screenshot shows the 'Categorize Clients' form with an expanded row. The table has three columns: 'Client Name', 'Categories', and 'Client ID'. The first row is expanded, showing a search bar with a magnifying glass icon and the word 'Search' next to the 'Client Name' field. The 'Categories' column shows a dropdown menu labeled 'Choose Options...'. The 'Client ID' column shows a text input field with a clear button (X) next to it.

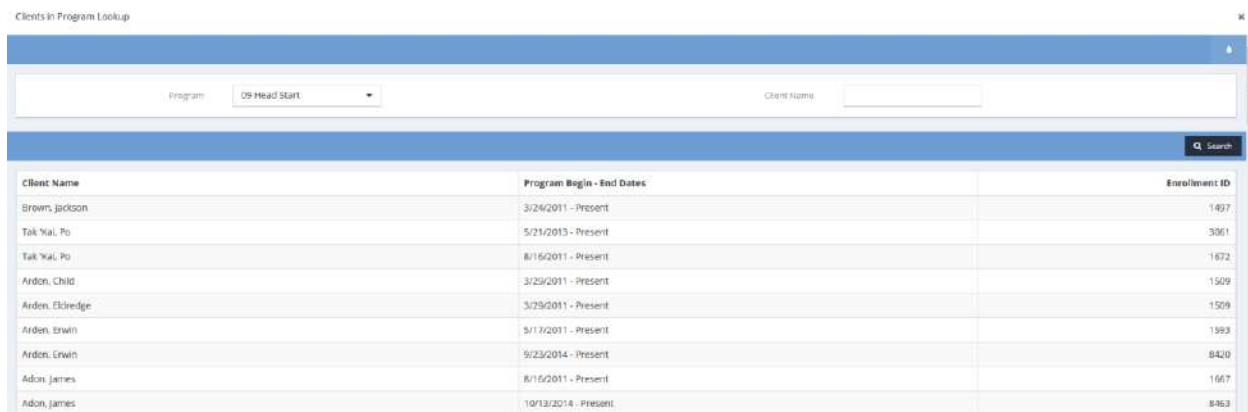
Client Name	Categories	Client ID
<input type="text"/>	Choose Options...	<input type="text"/>

Click the magnifying glass  icon. The Clients in Program Lookup form displays.



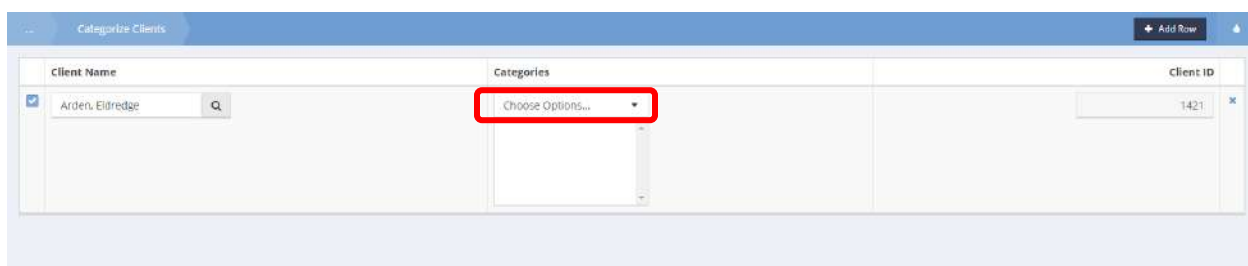
Select a program from the drop-down list and enter a name if desired. Click on the  button.



Results display in the space below the search parameters.



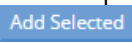



Client Name	Program Begin - End Dates	Enrollment ID
Brown, Jackson	3/24/2011 - Present	1497
Tak Yai, Po	5/21/2013 - Present	3061
Tak Yai, Po	8/16/2011 - Present	1672
Arden, Child	3/29/2011 - Present	1509
Arden, Eldredge	3/29/2011 - Present	1509
Arden, Erwin	5/17/2011 - Present	1993
Arden, Erwin	9/23/2014 - Present	8420
Adon, James	8/16/2011 - Present	1667
Adon, James	10/13/2014 - Present	8463

Select a client by clicking on the associated row. The Categorize Clients form appears again with the client name.




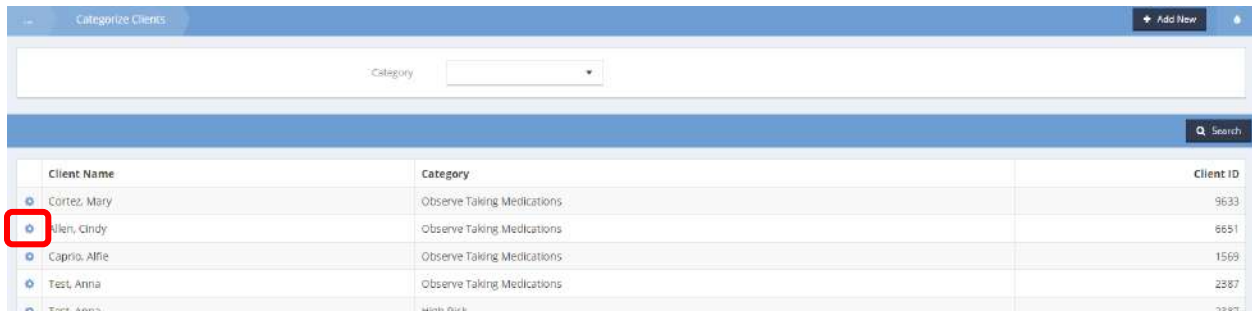
Client Name	Categories	Client ID
<input checked="" type="checkbox"/> Arden, Eldredge 	<div>Choose Options...</div>	1421 

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  button. Click  when finished.

## Edit Client Categories

**Objective:** Edit categories associated with a client.

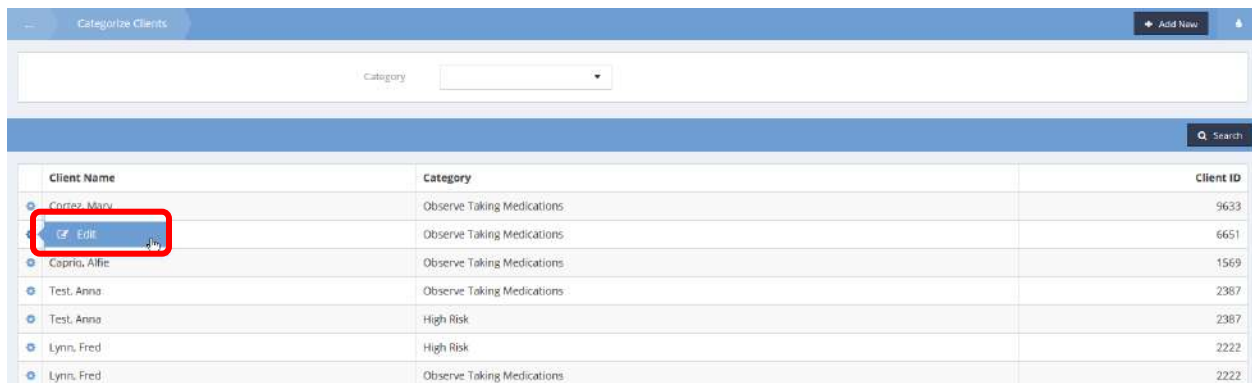
On the Categorize Clients form, click the action gear  icon associated with the desired client.



The screenshot shows the 'Categorize Clients' form. At the top, there is a 'Category' dropdown menu. Below it is a search bar. The main part of the form is a table with three columns: 'Client Name', 'Category', and 'Client ID'. The table contains five rows of data. The second row, for 'Allen, Cindy', is highlighted with a red box around the gear icon in the first column.


Client Name	Category	Client ID
Cortez, Mary	Observe Taking Medications	9633
Allen, Cindy	Observe Taking Medications	6651
Caprio, Allie	Observe Taking Medications	1569
Test, Anna	Observe Taking Medications	2387
Test, Anna	Observe Taking Medications	2387

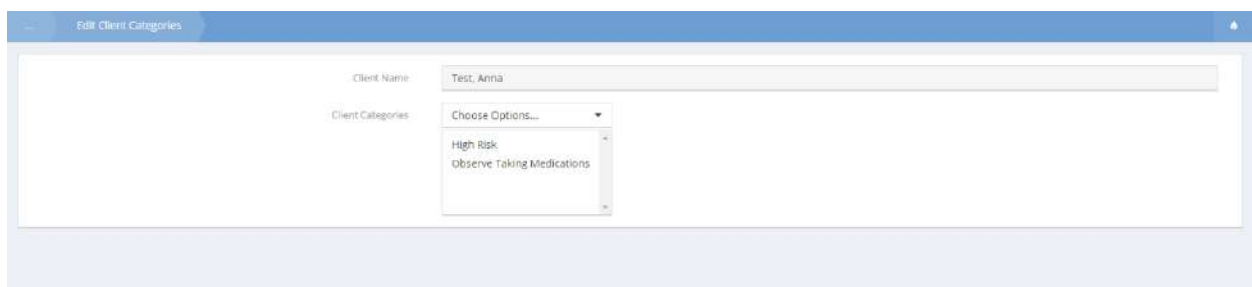
Select Edit from the pop up menu that appears.



The screenshot shows the 'Categorize Clients' form with the same table as before. The 'Edit' button in the first column of the second row is highlighted with a red box.

Client Name	Category	Client ID
Cortez, Mary	Observe Taking Medications	9633
Allen, Cindy	Observe Taking Medications	6651
Caprio, Allie	Observe Taking Medications	1569
Test, Anna	Observe Taking Medications	2387
Test, Anna	High Risk	2387
Lynn, Fred	High Risk	2222
Lynn, Fred	Observe Taking Medications	2222

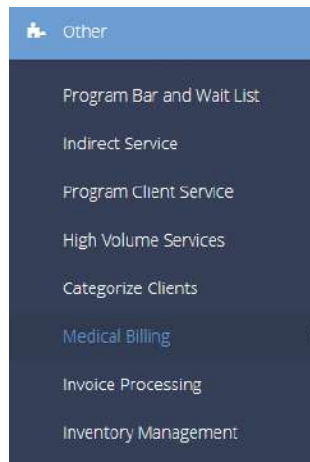
The Edit Client Categories form displays. Make any changes and click on the  button.



The screenshot shows the 'Edit Client Categories' form. It has a 'Client Name' field with 'Test, Anna' entered. Below it is a 'Client Categories' dropdown menu. The dropdown menu is open, showing 'Choose Options...', 'High Risk', and 'Observe Taking Medications'.

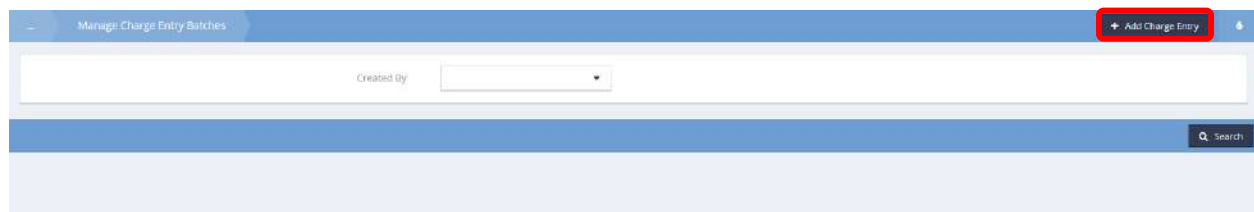
Client Name	Client Categories
Test, Anna	Choose Options... High Risk Observe Taking Medications

## 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.

A screenshot of the "Charge Entry Line Item" form. It has a blue header with a minus icon, the title "Charge Entry Line Item", and a plus icon. The form is divided into several sections: "Choose Batch" with a "Batch Name" field and a magnifying glass icon; "Choose Patient" with a "Patient" field and a magnifying glass icon, and an "Enrollment" dropdown; "Provider Information" with "Billing Group", "Primary Insurance", and "Secondary Insurance" fields; and "Relevant Dates" with "Date of Current Illness, Injury or Pregnancy", "Other Date", "Hospitalization Start Date", "Qualifier" dropdowns, and "End Date" fields. The magnifying glass icon in the "Choose Batch" section is highlighted with a red box.

Click the magnifying glass  icon to choose a batch.

The Charge Entry Batch Lookup displays.

Charge Entry Batch Lookup

Created by

Batch Name	Description	Created By
janeTjoe - 01/08/2015 - 1	j	janeTjoe
janeTjoe - 01/09/2015 - 2	j	janeTjoe
janeTjoe - 01/09/2015 - 3	Test this one	janeTjoe
kallen - 01/09/2015 - 4	Test Kathleen	kallen
iveay - 01/09/2015 - 5	Dale Test Batch	iveay
kallen - 01/12/2015 - 6	Monday Morning	kallen
kallen - 01/12/2015 - 7	Monday Afternoon	kallen

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.

Charge Entry Batch Lookup

Description

**Save** **Cancel**

Simply enter a description and click on the **Save** button. The Charge Entry Line Item form displays.

Charge Entry Line Item

Choose Batch

Batch Name \*  **Q**

Choose Patient

Patient \*  **Q** Enrollment \*

Provider Information

Billing Group \*

Primary Insurance \*

Secondary Insurance

Relevant Dates

Date of Current Illness, Injury or Pregnancy  **Q** Qualifier


Other Date  **Q** Qualifier

Hospitalization Start Date  **Q** End Date  **Q**

Diagnosis or Nature of Illness or Injury

Diagnosis

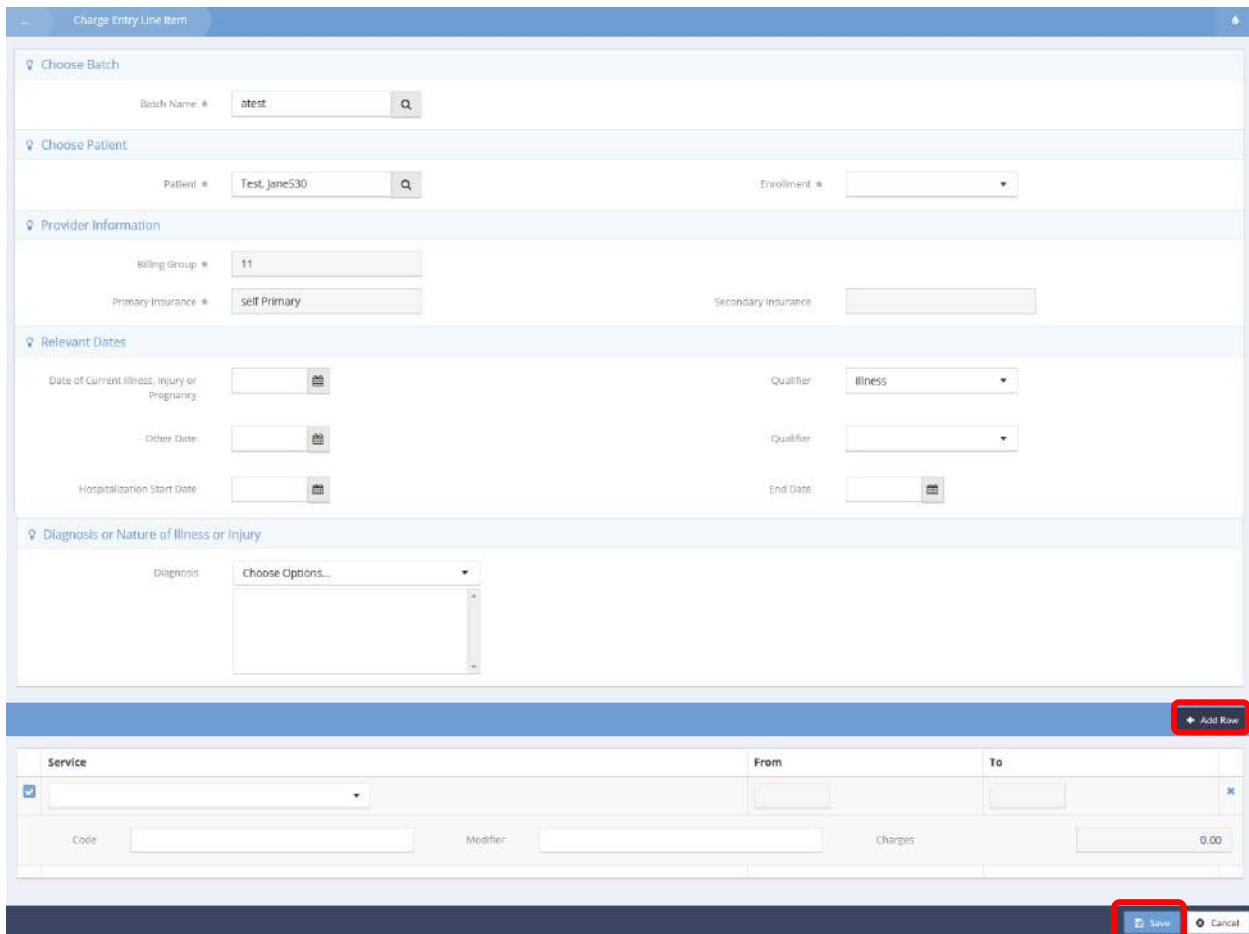
**Save** **Cancel**

Click the magnifying glass  icon to choose a patient. The Find Client Lookup form displays.








The Find Client Lookup form is displayed. It includes input fields for Last Name, First Name, SSN, Birth Date, and Client ID. A magnifying glass icon is visible next to the Birth Date field. A red box highlights the Search button in the bottom right corner.

Enter any known client info and click on the  button. Select the desired client from the results displayed below. The Charge Entry Line Item form displays.




The Charge Entry Line Item form is displayed. It includes sections for Choose Batch, Choose Patient, Provider Information, Relevant Dates, and Diagnosis or Nature of Illness or Injury. A red box highlights the Add Row button in the bottom right corner. Below the form, there is a table with columns for Service, From, To, Code, Modifier, Charges, and a total of 0.00. A red box highlights the Save button in the bottom right corner.

Service	From	To	Code	Modifier	Charges
<input checked="" type="checkbox"/> 					0.00


Select an enrollment and fill out any other fields. Click  if an additional line item is needed. Click  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.

Batch Name	Description	Status
janeTjoe - 01/08/2015 - 1	j	Open
janeTjoe - 01/08/2015 - 2	j	Open
janeTjoe - 01/08/2015 - 3	Test this one	Open
kallen - 01/08/2015 - 4	Test Kathleen	Open
tseay - 01/09/2015 - 5	Dale Test Batch	Open
kallen - 01/12/2015 - 6	Monday Morning	Open

Batch Name	Description	Status
janeTjoe - 01/08/2015 - 1	j	Open
<b>Charge Entries</b>	j	Open
janeTjoe - 01/08/2015 - 3	Test this one	Open
kallen - 01/08/2015 - 4	Test Kathleen	Open

Click the action gear  and click Charge Entries. The Batch Charge Entry Summary form displays.


Batch	Client Name	Primary Insurance	Services	Total Amount	Charge Entry ID
janeTjoe - 01/08/2015 - 2	Waters, Bob	Bob Medicare		\$100.00	39
janeTjoe - 01/08/2015 - 2	Waters, Bob	Bob Medicare		\$11.90	44
Total:				\$111.90	



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

Services

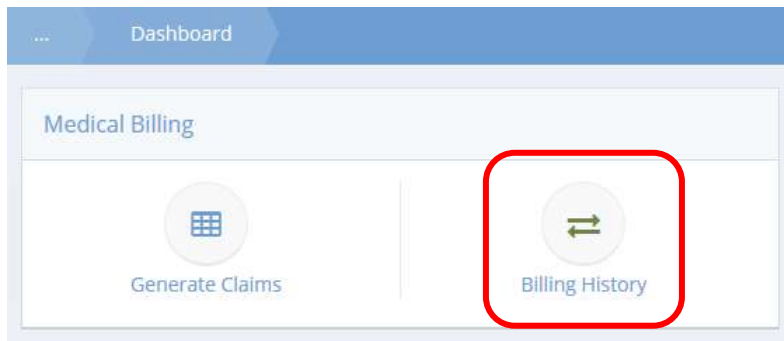
Service	From	To	CPT Code	Modifier	Charges
Therapeutic, Prophylactic or Diagnostic Injection	1/12/2015	1/12/2015	90772	AJ	\$11.90
Total:					\$11.90

Click  when finished viewing.

## Billing History

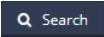
**Objective:** View organization medical billing history.

**Navigation:** Organization>Other>Medical Billing



Click the icon for Billing History. The Billing History form displays.

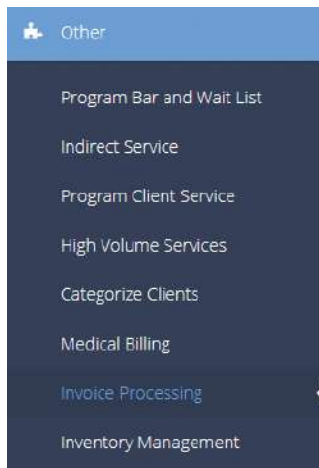
A screenshot of the "Billing History" form. At the top is a blue header bar with "Billing History" in white. Below the header is a white search area. In this area, there is a date range filter: "Bill Date" followed by a date input field containing "09/25/2015", a calendar icon, the word "through", another date input field containing "09/25/2015", and another calendar icon. This entire date range filter is enclosed in a red rectangular box. To the right of the search area is a blue button with a magnifying glass icon and the word "Search", which is also enclosed in a red rectangular box. Below the search area is a table with the following headers: "Client Name", "Bill Date", "Billed By", "Charge Entry Batch", "Charge Entry Status", "Export ID", and "Charge Entry ID".

Select a date range and click the  button.

Billed items display below the  button.

Billing History						
Bill Date: 09/01/2015 through 09/25/2015						
Search						
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
Furthermore, Gentry	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

Approved Client Time - To Be Invoiced			
ProviderName	# Of Clients	# Of Transactions	Hours
ECG	1	1	1.00
Goodwill Houston - Project Time (TEST)	7	7	57.00

Invoices Prepared - To Be Printed			
ProviderName	# Of Clients	# Of Transactions	Amount
Apple Computers - Real	2	2	\$0.00
CaseWorthy	1	4	\$0.00
Denver Rescue Mission (TEST)	7	8	\$20,625.00
Goodwill Houston - Project Time (TEST)	28	54	\$3,686.26

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.

Approved Client Project Time Summary

Quick Client Entry - Add New Add New

Total Rows: 8


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	Baltran, 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.

Enter Client Project Time

Add Row

Customer \* Project \*

Client \* 


Weekly Date Period 03/27/2015

Total Rows: 0

Date *	Pay Type *	Task *	Hours *	Rate	Amount
03/27/2015	Regular		0.00		

Description of Work

Project Transaction, Project Task ID

Select the Client by clicking on the magnifying glass  icon. The Find Client Lookup form displays.

Find Client Lookup


Find Client

Last Name First Name Client ID

SSN Birth Date Relation To User



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  Save button.

Enter Client Project Time

Add Row

Customer \*  
Goodwill Houston - Project Time (TEST)

Project \*  
Employment Contract Services

Client \*  
Bosell, Steve

Weekly Date Period  
03/27/2015

Total Rows: 0

Date \*

03/27/2015

Pay Type \*

Regular

Task \*

File Clerk - Level 1

Hours \*

5.00

Rate

8.00

Amount

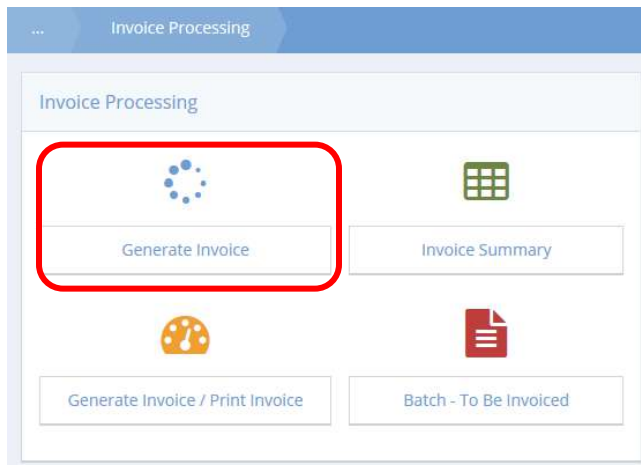
\$40.00

Description of Work:  
HR MIS Conversion Assistance

ProjectTransaction,ProjectTaskID  
197

## Generate All Invoice

Click the icon for Generate Invoice.



The Invoice Line (Create) page displays.

Date Range of Approved Transactions: 03/11/2015 to 12/31/9999

Apply Customer Fringe Rate: ☐

Total Rows: 0

Search

<input type="checkbox"/>	Time Trans Date	Client	Task	Quantity *	Rate	WF_DefaultAmount	Amount *
--------------------------	-----------------	--------	------	------------	------	------------------	----------

After supplying a date range, click **Search** to display the records to be processed.


Date Range of Approved Transactions: 08/14/2013 to 12/31/9999

Apply Customer Fringe Rate: ☐

Total Rows: 3

Search

<input type="checkbox"/>	Time Trans Date	Client	Task	Quantity *	Rate	WF_DefaultAmount	Amount *
<input checked="" type="checkbox"/>	7/28/2014	Wrapp, Mitch - description	Client Work Services	1.00	\$0.00	111	
<input checked="" type="checkbox"/>	10/4/2013	Balboa, Rocky - Data Conversion	Data Conversion	1.00	\$0.00	111	
<input checked="" type="checkbox"/>	8/15/2013	simon, simple -	Client Work Services	1.00	\$0.00	111	

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.

Create Invoice Line

Date Range of Approved Transactions: 08/14/2013 TO 12/31/9999

Apply Customer Fringe Rate: ☐


Total Rows: 3

Time Trans Date	Client	Task	Quantity *	Rate	WF_DefaultAmount	Amount *
<input checked="" type="checkbox"/> 02/28/2014	Wrapp, Mitch - description	Client Work Services	1.00		111	
Rate with Fringe						
<input checked="" type="checkbox"/> 10/04/2013	Balboa, Rocky - Data Conversion	Data Conversion	1.00	125.0000	111	
Rate with Fringe \$150.19						
<input checked="" type="checkbox"/> 08/15/2013	simon, simple -	Client Work Services	1.00	15.0000	111	
Rate with Fringe \$18.02						
			Total: 3.00			


The user is returned to the Invoice Processing menu.

Invoice Processing


Invoice Processing




Generate Invoice



Invoice Summary



Generate Invoice / Print Invoice




Batch - To Be Invoiced


Click the icon for Invoice Summary.





The Invoice All Summary page displays.

Invoice All Summary							
Total Rows: 52							
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

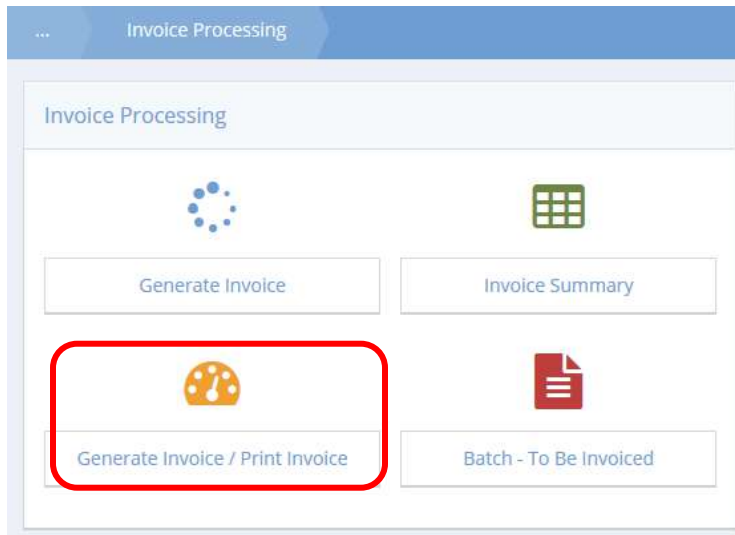
Click on the action gear  to the left of the invoice generated and click on Invoice Detail.

Invoice All Summary							
Total Rows: 52							
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
 Invoice Detail	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

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 *						
<input checked="" type="checkbox"/> 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
					<b>Total: \$316.50</b>	

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.

Invoice Batch Summary			
Total Rows: 1			
	Created By	Printed Date	Batch ID
<b>Print Invoices in Batch</b>	Ellason, Adrian		20

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.





CaseWorthy  
740 East 3900 South  
Salt Lake City, UT 84107  
801-888-9999

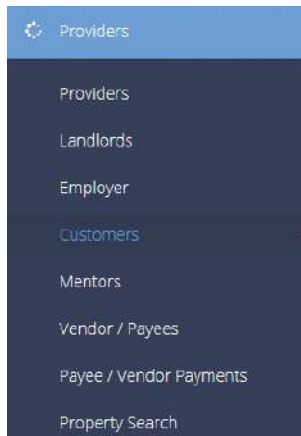
To: Goodwill Houston - Project Time (TEST)  
123 South Main Street  
SALT LAKE CITY, UT 84107

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.

A screenshot of the 'Customers' page. At the top is a search bar labeled 'Customer Name' and an 'Add Customer' button. Below is a table with 46 rows. The first row is 'Appalachian Regional Coalition on Homelessness'. A dropdown menu is open for the second row, showing options: 'Edit', 'Managed Programs', 'Projects' (highlighted with a red box), 'Invoices', 'Contacts', 'Fringe Rates', 'Database Version', 'Generate Invoice', and 'Delete'.


Customer Name	Address	City, State Zip Code	Phone	Customer ID
Appalachian Regional Coalition on Homelessness	321 West Walnut Street	Johnson City, TN 37604	423-218-0846	128
tion Group	1500 University Drive East	College Station, TX 77840		120
	3550 West Americana Terrace	Boise, ID 83706	208-375-7382	4135
	740 E 3900 South	SALT LAKE CITY, UT 84107		101
	740 East 3900 South	Salt Lake City, UT 84107		9692
Archdiocese of Boston	51 Sleeper St.	BOSTON, MA 02210	617-482-5440	131
	2401 Lake Park Drive	Smyrna, GA 30080		5556
rn Missouri	601 South Jefferson Avenue	Springfield, MO 65806		9744
	1501 North Classen Boulevard	Oklahoma City, OK 73106	405-523-3000	129
Center	3230 Mercer Street	Houston, TX 77027		5555

The Projects (Summary) page displays a list of projects for that customer.

	Status	Phase	Release Version	Description / Status	Begin - End Dates	Project Manager	Actual Hours	Contract Hours	Contract Amount
	Open	0		CCAB Phase 2 / Open	5/15/2013 - Present	monti, meg	258.25	10,678.00	\$1,339,550.00
	Open	0		Monthly Support / Open	12/1/2012 - 12/31/2013	Wilson, Nina	324.50	9,457.77	\$1,182,272.00
	Open	0		ECM Implementation / Open	12/1/2012 - Present	monti, meg	97.00	2,160.00	\$270,000.00
							<b>Total: 679.75</b>	<b>Total: 22,295.77</b>	<b>Total: 2,791,822.00</b>

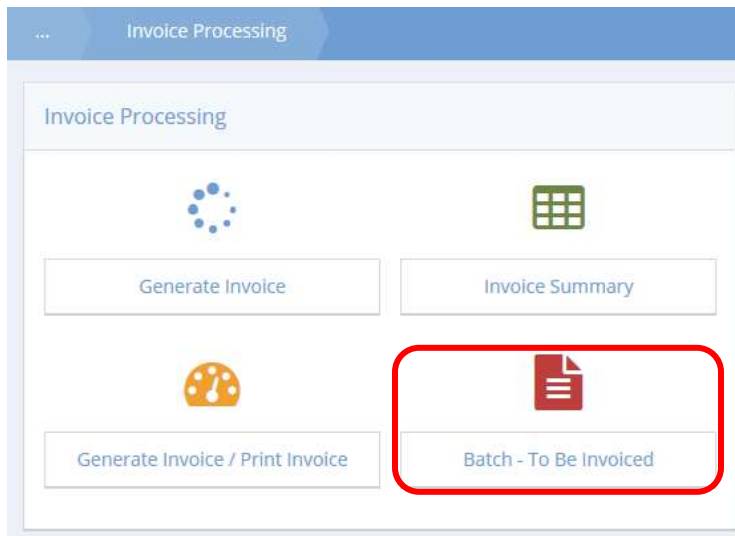
Select one of the projects on the list and click on the action gear  to the left of the project record. Select Invoices from the pop up menu that appears.

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.


Invoice Batch Summary			
Total Rows: 20			
Batch Create Date	Created By	Printed Date	Batch ID
3/11/2015	Eliason, Adrian		20
2/13/2014	Bingel, Brian		19
9/5/2013	Bingel, Brian		18
8/27/2013	Bingel, Brian		17
8/12/2013	Seay, Dale		16
8/11/2013	Bingel, Brian		15
8/7/2013	Seay, Dale		14
8/6/2013	Tjoe, Jane		13
7/31/2013	Beck, Cameron		12
7/31/2013	Beck, Cameron		11

Locate the desired batch and click on the action gear  icon associated with it. Select Detail from the pop-up menu that appears.

Invoice Batch Summary				
Total Rows: 20				
		Created By	Printed Date	Batch ID
		Ellason, Adrian		20
		Bingel, Brian		19
		Bingel, Brian		18
		Bingel, Brian		17
		Seay, Dale		16
		Bingel, Brian		15


The Batch – To Be Printed Detail form displays.

Batch - To Be Printed Detail					
Total Rows: 1					
Batch ID	Customer	Project Description	Invoice Number	Invoice Date	Due Date
	20	Goodwill Houston - Project Time (TEST)	Employment Contract Services	35	3/3/2014
				4/2/2014	

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.

Batch - To Be Printed Detail					
Total Rows: 1					
Batch ID	Customer	Project Description	Invoice Number	Invoice Date	Due Date
	20	Goodwill Houston - Project Time (TEST)	Employment Contract Services	35	3/3/2014
				4/2/2014	

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  **Report** 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.

Approved Client Time - To Be Invoiced			
ProviderName	# Of Clients	# Of Transactions	Hours
ECG	1	1	1.00
Goodwill Houston - Project Time (TEST)	7	7	57.00


  

Invoices Prepared - To Be Printed			
ProviderName	# Of Clients	# Of Transactions	Amount
Apple Computers - Real	2	2	\$0.00
CaseWorthy	1	4	\$0.00
Denver Rescue Mission (TEST)	7	8	\$20,625.00
Goodwill Houston - Project Time (TEST)	28	54	\$3,686.25



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.

Invoice Unprinted All Summary										
Customer: <input type="text"/>										
Total Rows: 72 <span>Search</span>										
Customer	Project	Invoice Description	Client	InvoiceHeaderID	Invoice Date	Due Date	Printed Date	Invoice Number	Amount	
Goodwill Houston - Project Time (TEST)	Employment Contract Services	Test Invoice Description for XXX	Carter, Cindy	95	6/4/2014	7/4/2014		37	\$84.00	
Goodwill Houston - Project Time (TEST)	Employment Contract Services	Test Invoice Description for XXX	Lincoln, Mary	95	6/4/2014	7/4/2014		37	\$120.00	
Goodwill Houston - Project Time (TEST)	Employment Contract Services	Test Invoice Description for XXX	Page, Shaun	95	6/4/2014	7/4/2014		37	\$82.50	
Goodwill Houston - Project Time (TEST)	Employment Contract Services	Test Description	Everyman, John	94	3/3/2014	4/2/2014		36	\$10.00	

Locate the desired invoice and click on the action gear  associated with it. Select Detail from the pop-up menu that appears.

Invoice Unprinted All Summary										
Customer: <input type="text"/>										
Total Rows: 72 <span>Search</span>										
Customer	Project	Invoice Description	Client	InvoiceHeaderID	Invoice Date	Due Date	Printed Date	Invoice Number	Amount	
Goodwill Houston - Project Time (TEST)	Employment Contract Services	Test Invoice Description for XXX	Carter, Cindy	95	6/4/2014	7/4/2014		37	\$84.00	
 Detail	Employment Contract Services	Test Invoice Description for XXX	Lincoln, Mary	95	6/4/2014	7/4/2014		37	\$120.00	
Goodwill Houston - Project Time (TEST)	Employment Contract Services	Test Invoice Description for XXX	Page, Shaun	95	6/4/2014	7/4/2014		37	\$82.50	

The Edit Project Invoice form displays.

Customer: Goodwill Houston - Project Time (TEST)

Project: Employment Contract Services

Invoice Number: 37

Invoice Date: 06/04/2014


Invoice Description: Test Invoice Description for XXX

Terms: Net 30

Due Date: 07/04/2014

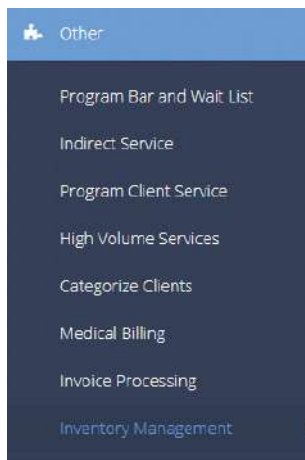
Sales Rep: Bingol, Brian

Entity Name	Service Description	Unit of Measure	Quantity *	Rate *	Amount *
<input checked="" type="checkbox"/> Carter, Cindy	File Clerk - Level 2	Days	7.00	\$0.00	
<input checked="" type="checkbox"/> Lincoln, Mary	Client Work Services	Days	8.00	\$0.00	
<input checked="" type="checkbox"/> Page, Shaun	Client Work Services	Days	5.50	\$0.00	
			<b>Total: 20.50</b>		<b>Total: \$0.00</b>

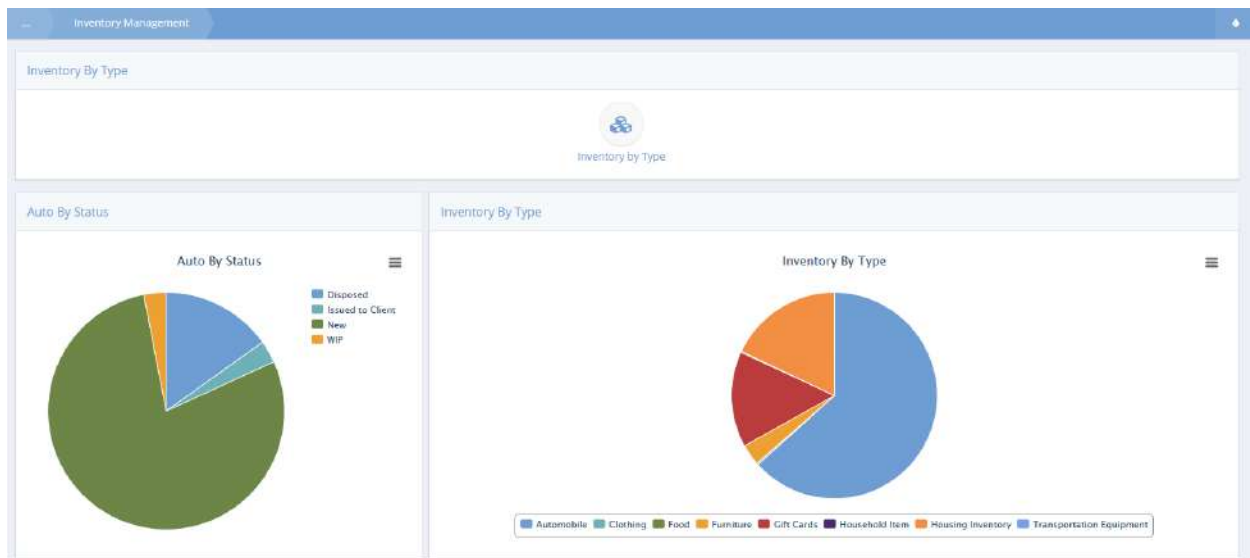
Make any desired changes and click the  Save button.

## Inventory Management

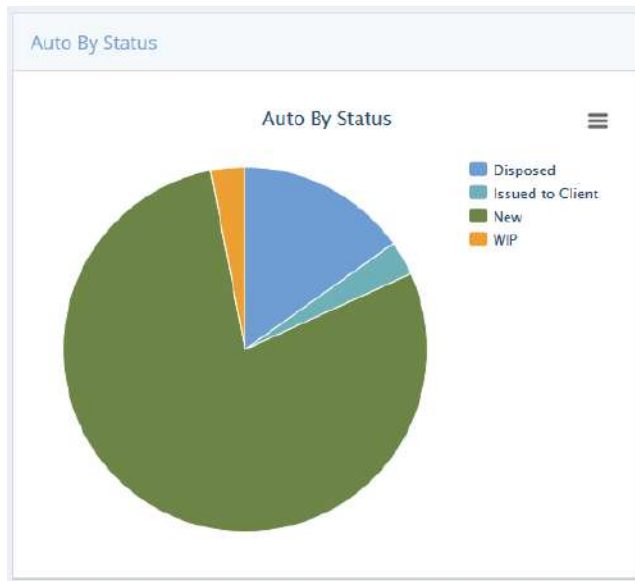
### Inventory Charts



**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	Cio, Stuart	2000, Toyota, Camry	1	\$2.00	\$0.00

Locate the desired vehicle and click on the action gear  associated with it.

Automobile Inventory Drill from Chart

Total Rows: 32

	Description	Status	Donor	Year, Make, Model	Units	Total	Total Activity
	Delorean	New		1983, DMC-12, Delorean	1	\$0.00	\$0.00
	1st Honda	Disposed		2008, Honda, Civic	1	\$10,000.00	\$0.00
	98 Chevy Astro	New		1998, Chevrolet, Astro	1	\$1.00	\$0.00
	72 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

Select Edit from the pop-up menu that appears. The Inventory (Add) form displays.

Add Inventory

Description:

Inventory Status:  Location:

Type:  Unit of Measure:

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


Begin Date:  End Date:

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

Units:  Rate:

Total:  Upload Image:







Post Auto Information:

Make any changes desired and click on the  Save button.

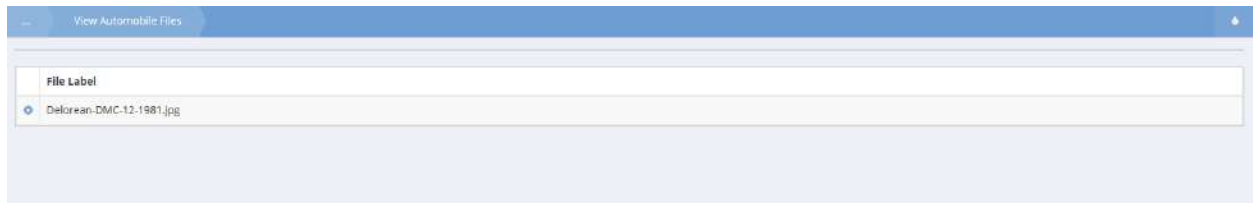
To view images of the vehicle, select View Images from the pop-up menu.

Automobile Inventory Drill from Chart

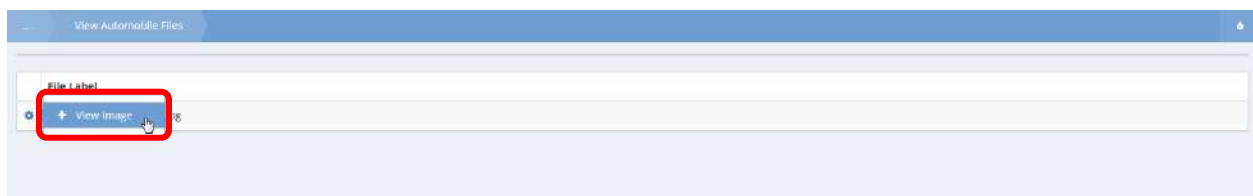
Total Rows: 32

	Description	Status	Donor	Year, Make, Model	Units	Total	Total Activity
	Delorean	New		1983, DMC-12, Delorean	1	\$0.00	\$0.00
	1st Honda	Disposed		2008, Honda, Civic	1	\$10,000.00	\$0.00
	98 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

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.

Automobile Inventory Drill from Chart								
Total Rows: 32								
	Description	Status	Donor	Year, Make, Model	Units	Total	Total Activity	
	Delorean	New		1983, DMC-12, Delorean	1	\$0.00	\$0.00	
	2008 Honda Civic	Disposed		2008, Honda, Civic	1	\$10,000.00	\$0.00	
	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	

The View Disposal Information form displays with a list of dispositions for the vehicle.

View Disposal Information					
Date	Client	Provider	Type	Fees	Amount

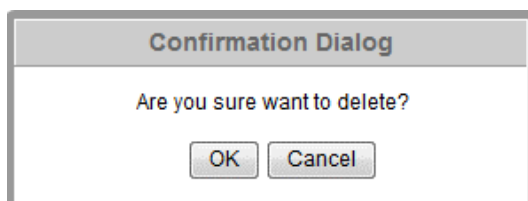
To delete a vehicle, select Delete from the pop-up menu.



Total Rows: 32

	Description	Status	Donor	Year, Make, Model	Units	Total	Total Activity
	Deorean	New		1983, DMC-12, Deorean	1	\$0.00	\$0.00
	Honda	Disposed		2008, Honda, Civic	1	\$10,000.00	\$0.00
	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

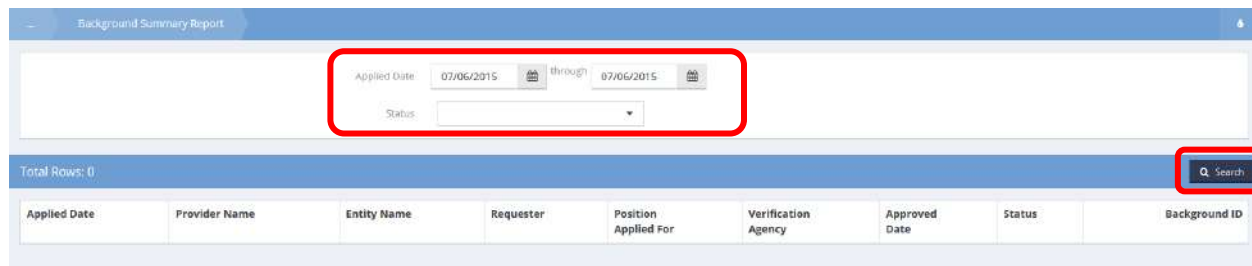
A dialog pops up requesting confirmation. Click  to delete.



## Background Report Summary

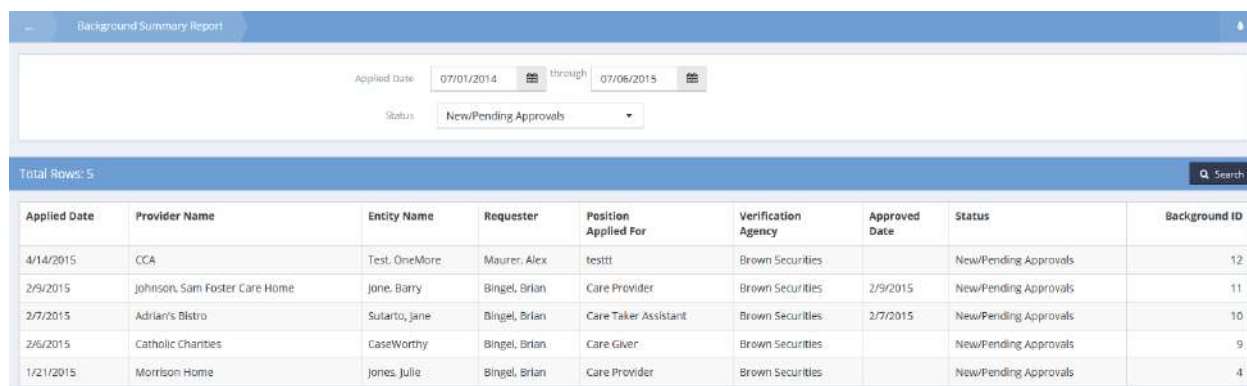
### Background Summary Report

**Objective:** View a background summary report within a specified date range and status type.



The screenshot shows the 'Background Summary Report' interface. At the top, there is a header bar with the title 'Background Summary Report'. Below the header, there is a filter section with two date pickers for 'Applied Date' (07/06/2015 through 07/06/2015) and a 'Status' dropdown menu. A red box highlights these filter controls. Below the filter section, there is a 'Total Rows: 0' indicator and a 'Search' button with a magnifying glass icon, also highlighted with a red box. Below the search bar, there is a table with the following columns: Applied Date, Provider Name, Entity Name, Requester, Position Applied For, Verification Agency, Approved Date, Status, and Background ID.

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 **Search** button to display the results. Results display in the spreadsheet below.



The screenshot shows the 'Background Summary Report' interface with filtered results. The 'Applied Date' filter is set to 07/01/2014 through 07/06/2015, and the 'Status' filter is set to 'New/Pending Approvals'. The 'Total Rows: 5' indicator is shown, and the 'Search' button is highlighted. The table below displays the results:


Applied Date	Provider Name	Entity Name	Requester	Position Applied For	Verification Agency	Approved Date	Status	Background ID
4/14/2015	CCA	Test, OneMore	Maurer, Alex	testtt	Brown Securities		New/Pending Approvals	12
2/3/2015	Johnson, Sam Foster Care Home	Jone, Barry	Bingel, Brian	Care Provider	Brown Securities	2/9/2015	New/Pending Approvals	11
2/7/2015	Adrian's Bistro	Sutarto, Jane	Bingel, Brian	Care Taker Assistant	Brown Securities	2/7/2015	New/Pending Approvals	10
2/6/2015	Catholic Charities	CaseWorthy	Bingel, Brian	Care Giver	Brown Securities		New/Pending Approvals	9
1/21/2015	Morrison Home	Jones, Julie	Bingel, Brian	Care Provider	Brown Securities		New/Pending Approvals	4



## 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.

Select Skill and Credential Types Lookup

Credential Category:

Total Rows: 113

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

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.

Add Credentials to Multiple Users

Credential \* Skill

Skill \* Ability to Motivate and Assist

Description

Filter User List

Organization

Provider

Total Rows: 439

User	Credential	Skill	Attend Start	Attend End	Hours	Months
<input checked="" type="checkbox"/> UnknownUser	Skill	Ability to Motivate and Assist				
Description <input type="text"/>						
<input type="checkbox"/> Administrator						
<input checked="" type="checkbox"/> Gracie	Skill	Ability to Motivate and Assist				
Description <input type="text"/>						
<input checked="" type="checkbox"/> Curtis						
<input checked="" type="checkbox"/> gabe						

To filter the users that display, use the Organization and Provider drop-down lists and click the  button. To add a credential to a user, click the clear checkbox ☒ icon. When all desired users have been selected, click the  button.

## Administration

Instructions related to the Administration workspace are found in the CaseWorthy™ System Administrator Manual.