CSLL - Caseload List

```
CAFSCSLL                          CASELOAD LIST              07/14/2016    11:41
USER ID : C81285                                                PAGE NO:   1

DISPLAY C=CLIENTS,R=REPORTS OR B=BOTH: B    VIEWING CASELOAD OF USER: C81285
TO SELECT, ENTER S=SELECT, R=RELEASE OR T=TRANSFER

    REPORT/                                --ASSIGNMENT--- PERM ALRT R&R/
SEL CAPS-ID   NAME                           DATE      TYP GOAL IND  CLNT  CPHL
 _  00001165 BRINKER, BONNIE               09/09/13     S   RTH       C     P
 _  00001166 GREEN, GREGORY                09/09/13     A   RTH       C     P
 _  00001167 HUDSON, HENRY                 09/09/13     S   RTH       C     P
 _  00001212 PICKLE, PAUL                  12/18/13     S   RTH       C     P
 _  00001163 PINK, PENNY                   09/09/13     S   RTH       C
 _  00001131 BARKER CHILD                  10/03/14     A             R
 _  00001130 DINKLE KIDS                   10/03/14     A             R
 _  00001169 NEIGHBOR CHILD                06/24/16     A        Y    R
 _  00001112 NEIGHBOR CHILD                05/15/14     A             R

                                                                  PATH: _
```

- The Caseload List screen is used to select an open or closed client, a referral or a provider to work on or to transfer authority to another worker

- Enter a CASE TYPE and CAPS will display the list of clients/referrals/providers assigned to your caseload and specific information relating to the type you have indicated

- When a record is selected with an S, the client, provider or report is activated (loaded into the global record)
  - When ENTER is pressed, CLID, FACD or RRD1 will be displayed depending on if the selection is a client, a provider or a report
  - Any screen accessed after this selection will contain data on the selected client, provider or report

- If the user chooses the option to transfer a client by selecting with a T, the AXED (Assignment Detail) screen will be displayed
  - Multiple transfers or the transfer of an entire caseload is accomplished by selection of each client with the option (T)
  - The user will then cycle through transfer screen for each selected client, provider or report to enter the new worker number for transfer

ALER - Alerts

```
CAFSALER                        ALERTS/TASK LIST            07/18/2016    12:02
USER ID : C74142SW                                          PAGE NO:   1   MORE

TO SELECT, ENTER X=SELECT TO SEE ALL ALERTS IN CATEGORY  X  # ALL ALERTS   111
 _  BIRTHDAY                      0          _  COURT                        2
 _  CLIENT/PERSON                 1          _  SERVICE                      0
 _  PLACEMENT                     9          _  REVIEW                       0
--------------------------------------------------------------------------------
DSPLY ALRT TYP(C,P,R,W):     ID#:                 VIEW ALRTS FOR USER: C74142SW
TO SELECT, ENTER S=SELECT, D=DELETE

SEL  CODE  ACTV DT  TYP   ID #       DUE DT    NAME
 _  S03006 07/11/16  C 00001654      07/11/16  DOE, ANNETTE
           PLEASE CONTACT THE SSI UNIT IF CHILD HAS MENTAL/PHYSICAL IMPAIRMEN
 _  S02016 07/08/16  C 00001658      07/08/16  DOE, SUZIE
           NEW GUARDIANSHIP PLACMENT, APPLY FOR RIBICOFF MEDICAID IF APPLICAB
 _  S02017 07/08/16  C 00001658      07/08/16  DOE, SUZIE
           A DISPOSITION OF EITHER 'PLC' OR 'TLC' IS REQUIRED BEFORE 'GSP'
 _  S03006 06/29/16  C 00001654      06/29/16  DOE, ANNETTE
           PLEASE CONTACT THE SSI UNIT IF CHILD HAS MENTAL/PHYSICAL IMPAIRMEN
 _  S05001 05/01/16  C 00001654      05/01/16  DOE, ANNETTE
           CHILD SUPPORT REFERRAL MUST BE DONE BY 07/30/2016

                                                                   PATH: _
```

- The alert screen displays messages that have been created by the system or by the worker, pertaining to the workers cases
  - To view the entire alert, select it with an “I” to display at the top half of the screen

- Alerts are triggered by events, due dates and errors. Examples of alerts are:
  - Notify the worker of an upcoming review date
  - Notify the worker when a client’s service eligibility changes
  - Notify the worker that certain eligibility information needs to be completed
  - Notify the worker of an upcoming court date
  - Notify the worker that payment approval over 5 days old

- Each alert will be displayed at a pre-set number of days prior to the due date as defined in the Code Table

- An alert will remain until a required action is taken, then CAPS or the worker will delete it by typing a “D” on the select line
  - If the alert is not a deletable alert, the worker must select it with an “S”
  - The worker will be taken to the appropriate screen to take action on that alert

- To create an alert, enter an “A” in the select field, at the top of the screen, and all of the information needed pertaining to the type of alert that you are trying to create

- To DELETE an alert, enter a “D” at the appropriate line and press ENTER
  - You may delete alerts that you have created yourself and certain system generated

alerts which have been defined as deletable

- To limit the alerts that are viewed, a worker may indicate the alert type (C, P, R, W) or type in the ID of the Client, Provider/Payment, Report, or any Worker generated alerts

STFL - Staff List

```
CAFSSTFL                          STAFF LIST                06/30/2016     9:21
USER ID : C74142CS                                                PAGE NO:   1

TO SELECT, ENTER A=ALERTS, C=CLIENT CASELOAD OR F=FACILITY CASELOAD

SEL  WORKER ID    NAME                      CLIENTS  R/R'S  FACILITIES  ALERTS
 _    C74142F    COORDINATOR, FGDM                                        37
 _    C74142FG   COORDINATOR, FGDM                                        37
 _    C74142SW   DEE, TWEEDLE                 190      26        1        101
 _    C74142W    WORKER, SOCIAL                 6       1                  1
 _    C74142WA   WORKER, CWA                    1
 _    C74242CW   WORKER, CWA                    1                          1

                                                                   PATH: _
```

- STFL displays all of the workers under the supervision of the supervisor who is logged on and the total number of clients, report/referrals, facilities and alerts in each of their caseloads
- All data fields are display only
- If a worker line is selected with a “C”, that workers CSLL (Caseload List) screen will be displayed
- If a worker line is selected with an “F”, that workers FCLL (Facility Caseload List) screen will be displayed
- If a worker line is selected with an “A”, that workers ALER (Alerts) screen will be displayed

SEAL - See All Client Screens

```
CAFSSEAL                    SEE ALL CLIENT SCREENS          06/29/2016    15:56
USER ID : C81285                                                PAGE NO: 001
CAPS ID : 00001654    00     NAME: DOE, ANNETTE

TO SELECT, ENTER S=SELECT

  SCREEN                                    SCREEN
S  NAME                                   S  NAME
_  ADDL  ADDRESS LIST
_  AKAD  PERSON NAME AKA DETA
_  CELL  CLIENT ELIGIBILITY L
_  CLID  CLIENT DETAIL
_  CPHL  CLIENT PLACEMENT HIS
_  EVEL  EVENT LIST
_  IARL  INITIAL ASSESSMENT A
_  PERD  PERSON DETAIL
_  RELL  RELATIONSHIP LIST
_  SERL  SERVICE LIST
_  TASK  TASK DETAIL
_  TIID  TEAMS INITIAL INQUIR

                                                                  PATH: _
```

- This screen enables a worker to quickly view all the screens that have been filled out and updated on behalf of a client
- To access a particular screen, place an “S” on the select line - the system will then take you to that screen

AXED - Assignment/Transfers Detail

```
CAFSAXED                ASSIGNMENTS/TRANSFERS DETAIL        07/18/2016    12:19
USER ID : C74142SW

            PROCESSING CLIENT    :  0001656
                            NAME : DOE, BRANDY

            FUNCTION   : T  (ENTER A=ASSIGN, T=TRANSFER,
                                   R=READ ONLY, S=SHARE)
            COURTESY SUPERVISED?:
            FROM USER : C74142SW  DEE, TWEEDLE
            TO USER   : C74142W   WORKER, SOCIAL

            TYPE      : P      (T=TEMPORARY, P=PERMANENT)

            ENTER START DATE OF TRANSFER
                         OR CLIENT EFFECTIVE DATE: 07/18/2016
                                        END DATE: 99/99/9999

            IS THIS A PRIVATE ADOPTION AGENCY CLIENT (Y/N)? : N

FS900354 TO CONFIRM, PRESS F16(SHIFT+F4)                          . PATH: _
```

Type codes for **ENTITY TYPE**, **PROCESSING #**, **FUNCTION** fields & press Enter if you want CAPS messages to guide you in completing the rest of the required fields.

Remember to **Shift+F4** to Confirm your entry!

- The process of assigning a person to a worker makes the person a client.
- This screen can be used to:
  - Assign a person to a worker
  - Assign a client to a worker
  - Re-assign a closed client to a worker
  - Supervisor can assign a client to a worker
  - A worker can assign closed clients to their own caseload
  - A worker can share or grant temporary read only access for an entity.

- The F10 key allows you to select other persons from RELL (Relationship List) screen so multiple persons can be assigned to a worker at one time

- The system will not allow the worker to TRANSFER a client if
  - The client has any services that have any PENDING approval status
  - The client has any payments that are in UNAPPROVED, INCOMPLETE or MAILED status. Contact Central Office if the system stops you from transferring due to payment details, as they can take care of these for you

- It is VERY IMPORTANT that if a transfer is taking place between agencies (i.e., DPHHS to DOC) that the transfer is done promptly. This does affect funding source information for the new worker if not done immediately.

- When a transfer occurs, an event record is created and stored in the system

- ASSIGNMENT – This grants permanent access to the worker assigned. Requires:
  - **Entity Type**
  - **Processing field** = ID number (CAPS ID, if assigning individual to yourself)
  - **Function** = A
  - **To User** = (c number)
  - **Client Effective Date**
  - **Private Adoption indicator**

- TRANSFER - This grants permanent/or temporary access to another worker for a client, facility or report. CAPS defaults the Client Effective Date to the current system date. Requires:
  - **Entity Type**
  - **Processing field** = ID number
  - **Function** = T
  - **To User** = (other worker's c number)

- SHARED ACCESS - This grants shared permanent/temporary write access of a client to multiple users at one time. CAPS defaults the Client Effective Date to the current system date. Requires:
  - **Entity Type**
  - **Processing field** = ID number
  - **Function** = S
  - **Courtesy Supervised** = Y/N (only for sharing of **clients**)
  - **To User** = (other worker's c number)
  - **Type** = T (temporary) or P (permanent). If T, **End Date** is also required.

  Note: To terminate shared access, a Release is performed by entering an 'R' on the CSLL (Caseload List) screen of the worker who with shared access.

- READ ONLY - This grants temporary read only access with an expiration date no greater than five days. CAPS defaults the Client Effective Date to the current system date. If the End Date and Type fields are left blank, CAPS defaults the End Date to 5 days past current date, and the Type of T (Temporary).
  - **Entity Type**
  - **Processing field** = ID number
  - **Function** = R
  - **To User** = (other worker's c number)

USMD - User Maintenance Detail

```
CAFSUSMD                    USER MAINTENANCE DETAIL          06/29/2016    13:48
USER ID : C81285   MODIFY

        USER ID              : C74142SW                 START DATE: 01/01/1990
                                                     TERMINATION DATE: 99/99/9999
        FIRST NAME           : TWEEDLE
        MIDDLE NAME          :
        LAST NAME            : DEE

        STAFF TYPE           : CWA  CHILD PROTECTIVE SER
        SUPERTASKS           : N      DAY CARE ACCESS: Y

        SUPERVISOR ID        : C74142CS  DUM, TWEEDLE
        SERVICE REGION       : 4  SOUTHWESTERN REGION
        RGN ACCESS           : Y
        SERVICE COUNTIES     : 025
        LOCATION             :

        TITLE                : TEST CPIS WORKER
        TELEPHONE            :(406) 443-8638   EXT: 1
        CONTACT COUNTY       : 025  LEWIS & CLARK
        EMAIL ADDRESS        : TDEE@EMAIL.COM
SHFT+F5=SATD
                                                                      PATH: _
```

- This screen can be accessed in order to view identifying worker information if all you have is that worker's USER ID

- With the cursor in the USER ID field, type in the C# of the worker. The following information will be displayed
  - Worker's name and staff type
  - Supervisor and Approval Task Indicator ("Y" or "N")
  - Worker's supervisor and service region/counties
  - Worker's Title
  - Worker's phone number and contact county
  - Worker's email address

- This screen is also used to identify start and termination dates for worker's on the system

- If there is a "Y" in the SUPERVISOR AND APPROVAL TASKS field, press SHIFT+F5
  - SATD (Supervisor/Approval Tasks Detail) screen will be displayed
  - You can view what approval tasks or "supertasks" this worker has in the system

USML - User Maintenance List

```
CAFSUSML                    USER MAINTENANCE LIST              02/28/2007    13:51
USER ID : CS4566                                                     PAGE NO:   3

REGION :        COUNTY :
STAFF TYPE :                           STARTING LAST NAME :
DISPLAY THE WORKER HISTORY FOR USER-ID :
TO SELECT, ENTER I=INQUIRE, M=MODIFY OR D=DELETE
SEL USERID  NAME                       STAFF TYPE      RGN COUNTY------  PHONE
 _ C7TR34   THIRTYFOUR, TRAINEE        CWA COUNTY OFFIC 4 025 LEWIS & CL
 _ C7TR39   THIRTYNINE, TRAINEE        CWA COUNTY OFFIC 4 025 LEWIS & CL
 _ C7TR31   THIRTYONE, TRAINEE         CWA COUNTY OFFIC 4 025 LEWIS & CL
 _ C7TR37   THIRTYSEVEN, TRAINEE       CWA COUNTY OFFIC 4 025 LEWIS & CL
 _ C7TR36   THIRTYSIX, TRAINEE         CWA COUNTY OFFIC 4 025 LEWIS & CL
 _ C7TR33   THIRTYTHREE, TRAINEE       CWA COUNTY OFFIC 4 025 LEWIS & CL
 _ C7TR32   THIRTYTWO, TRAINEE         CWA COUNTY OFFIC 4 025 LEWIS & CL
 _ C7TR20   TWENTY, TRAINEE            CWA COUNTY OFFIC 4 025 LEWIS & CL
 _ C7TR28   TWENTYEIGHT, TRAINEE       CWA COUNTY OFFIC 4 025 LEWIS & CL
 _ C7TR25   TWENTYFIVE, TRAINEE        CWA COUNTY OFFIC 4 025 LEWIS & CL
 _ C7TR24   TWENTYFOUR, TRAINEE        CWA COUNTY OFFIC 4 025 LEWIS & CL
 _ C7TR29   TWENTYNINE, TRAINEE        CWA COUNTY OFFIC 4 025 LEWIS & CL
 _ C7TR21   TWENTYONE, TRAINEE         CWA COUNTY OFFIC 4 025 LEWIS & CL
 _ C7TR27   TWENTYSEVEN, TRAINEE       CWA COUNTY OFFIC 4 025 LEWIS & CL

                                                                   PATH:
```

- This screen can be accessed in order to view identifying worker information

- You can search for a worker by
  - Region
  - County
  - Staff type
  - Worker's last name
  - Worker's USER ID

- You have the ability to INQUIRE only on this information. Placing an "I" on the SELECT line next to the worker's USER ID will take you to USMD (User Maintenance Detail) and will display additional worker information