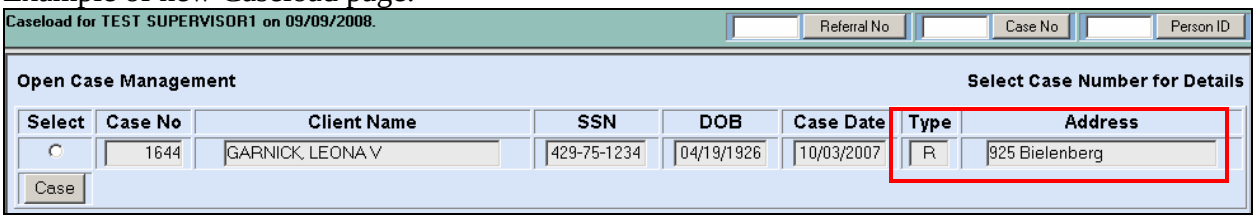
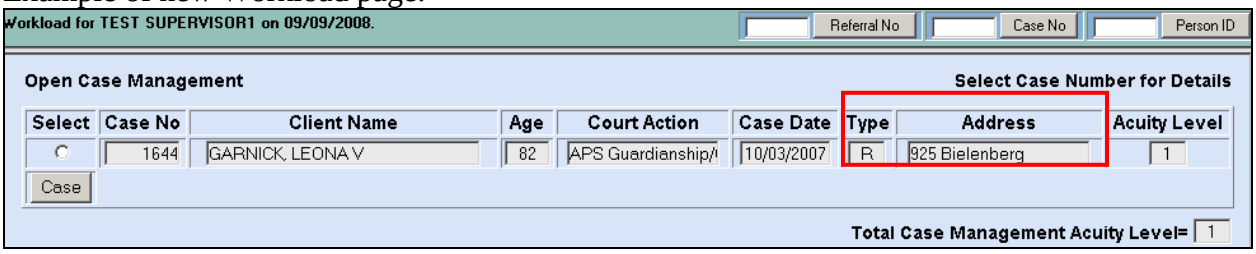
Change to address display on Caseload and Workload pages

The Caseload and Workload pages will now display current address information for the client on the case, regardless of address type. As long as an address has been entered on the Address Detail page for the client, the address will appear on the worker's Caseload and Workload lists. If multiple addresses exist on the Address Detail page, the address that displays will be based on the following hierarchy: placement, residential, mailing, business.

Example of new Caseload page:



Example of new Workload page:

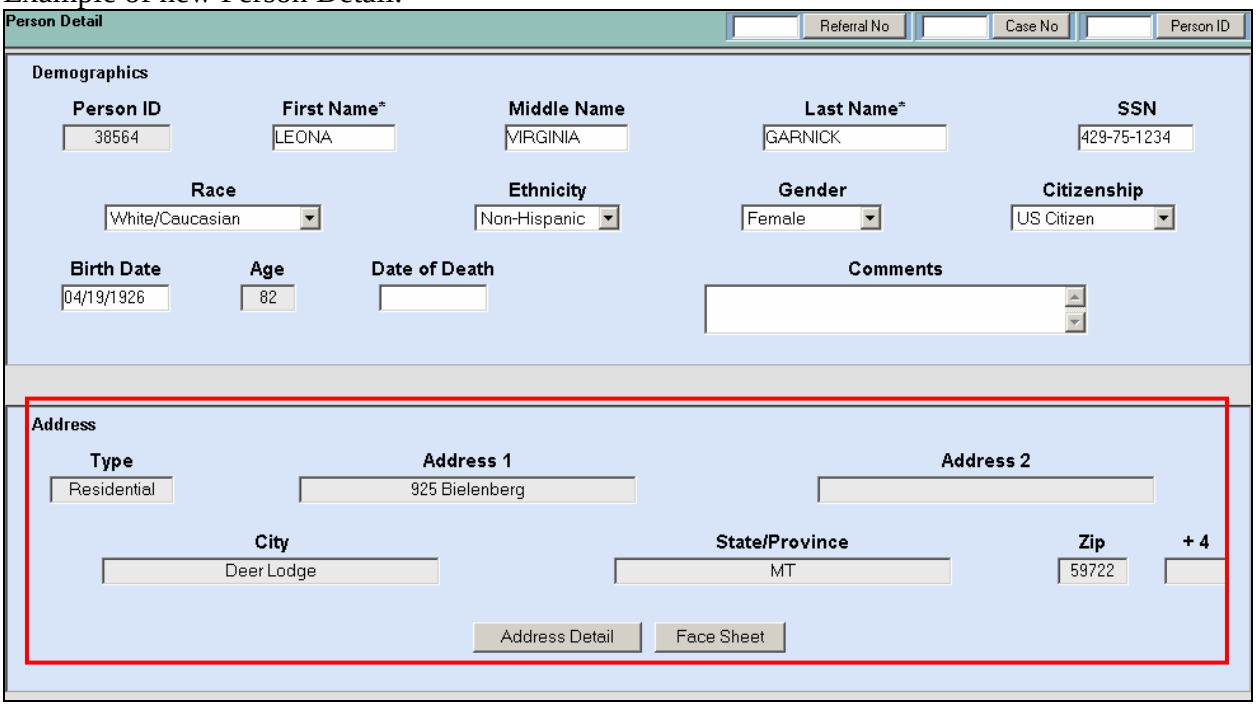


Person Detail – display and access of address details

The Address Detail button has been removed from the Demographics section of the Person Detail page. Current address information will now display in a new Address section. If multiple addresses exist for the person on the Address Detail page, the address that displays on Person Detail will be based on the following hierarchy: placement, residential, mailing, business.

How to add address information has not changed. Clicking the Address Detail button will access the Address Detail page and address information can be added and/or modified from that page.

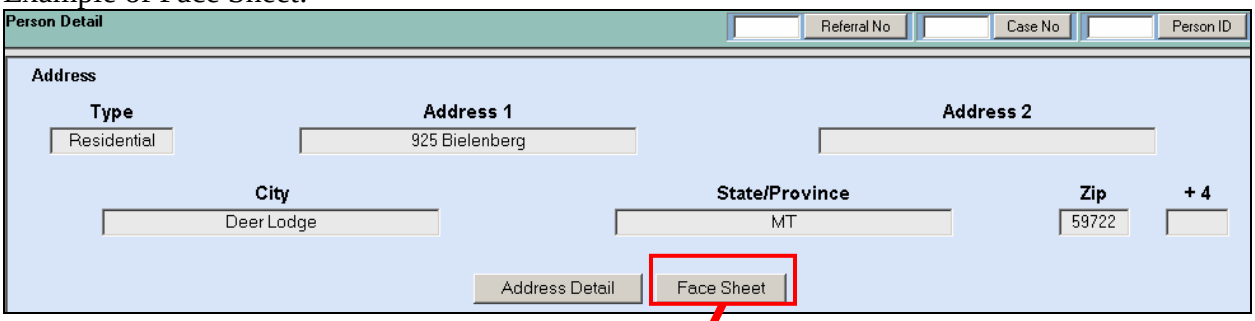
Example of new Person Detail:

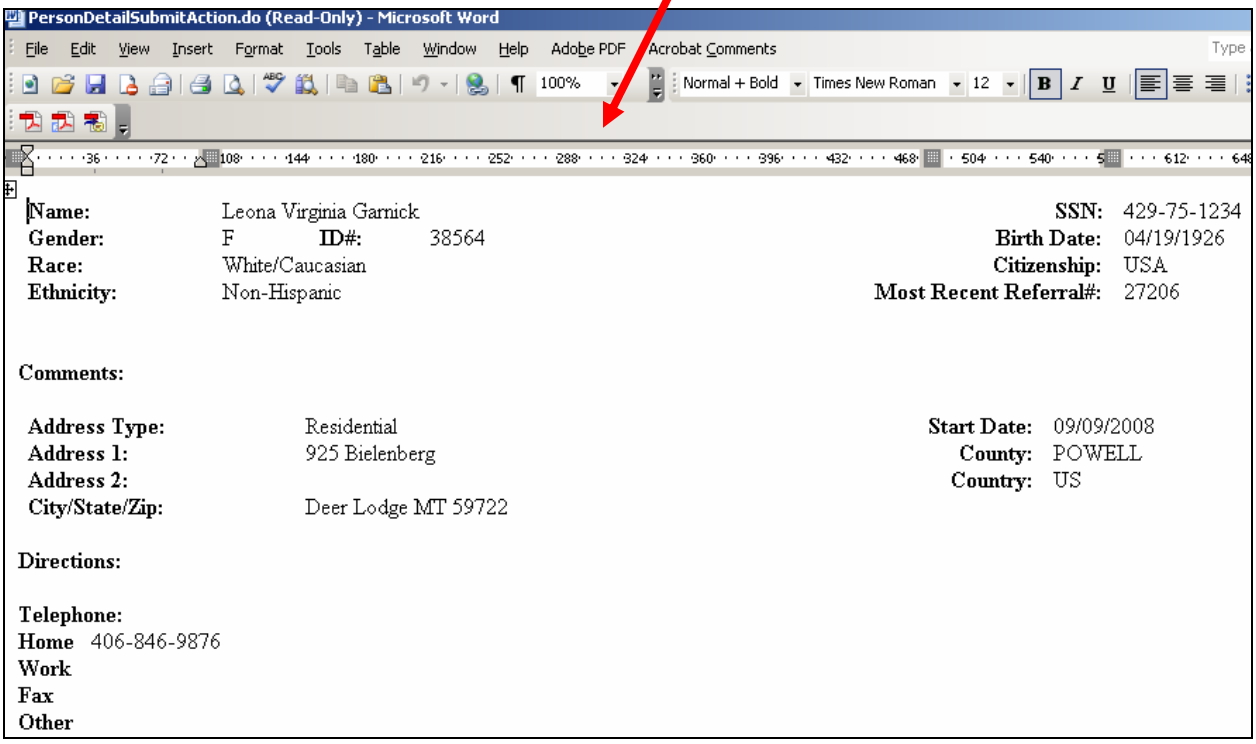


New FACE SHEET document

In the Address section of the Person Detail page, there is a Face Sheet button. Clicking this button will generate a Word document containing basic information for the person which can then be printed out and taken out on investigations, home visits or meetings. Information on the face sheet includes demographic details, address details and telephone details.

Example of Face Sheet:



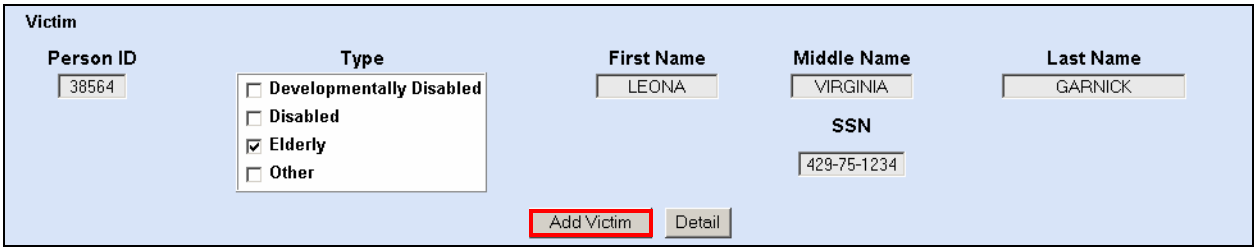


Change to accessing a referral directly from the Address Detail page

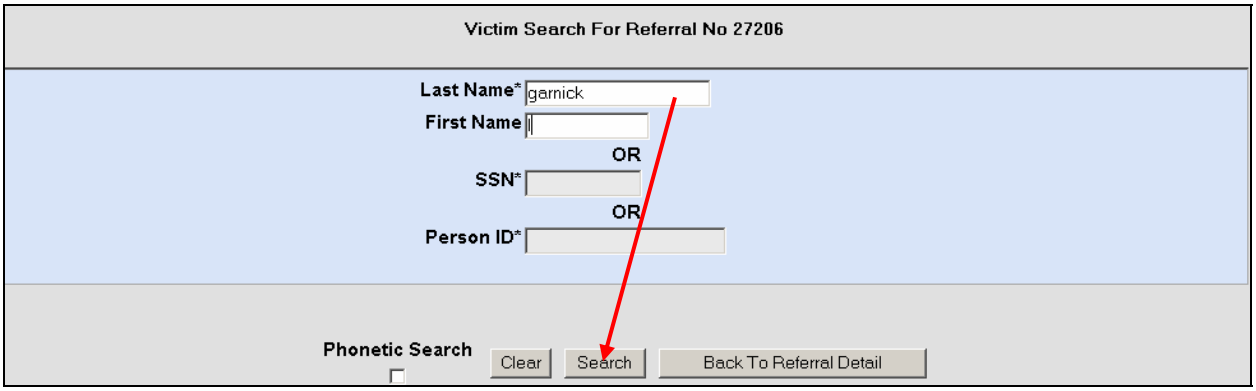
In the past, when working on a referral, if an address needed to be entered for the victim on the referral, the worker was required to leave the referral, add the address and then re-access the referral by using the quick access field or through their caseload/workload lists. A change has been made to the referral screen that will now allow the worker to go directly back to the referral once an address has been entered.

Follow these steps when adding a victim's address directly from the referral:

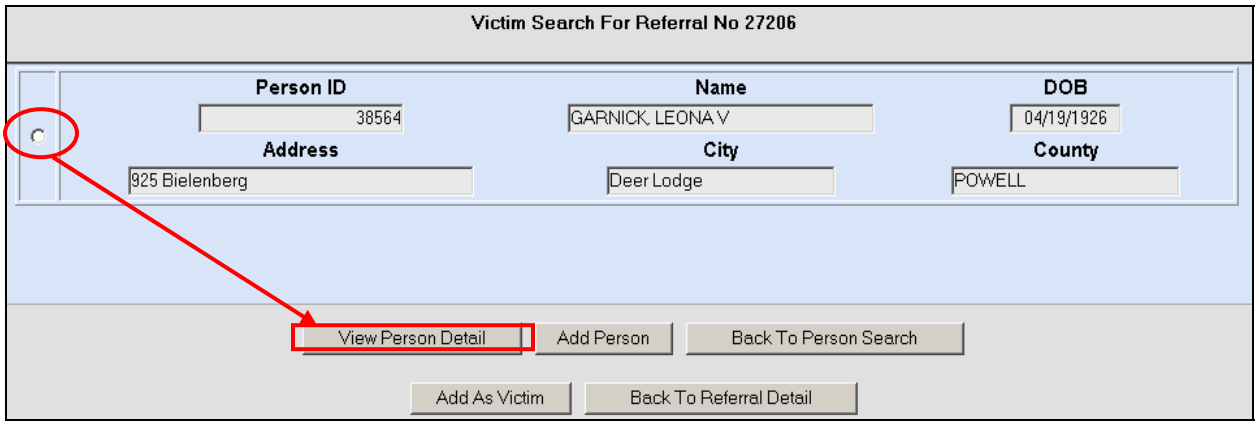
1) On the referral, in the Victim section, click the Add Victim button to access Person Search:



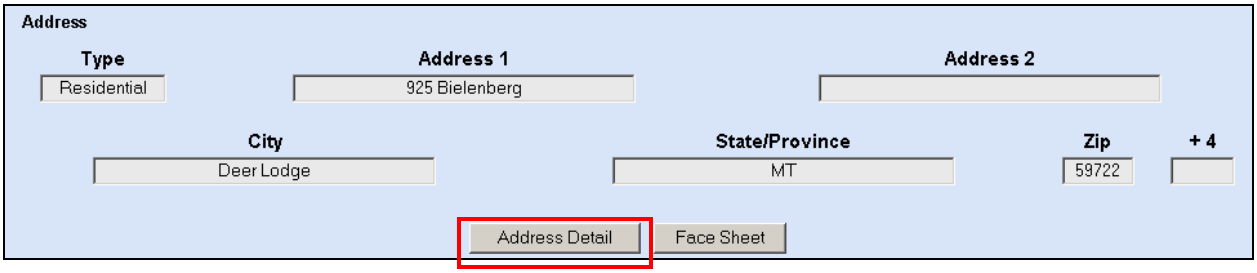
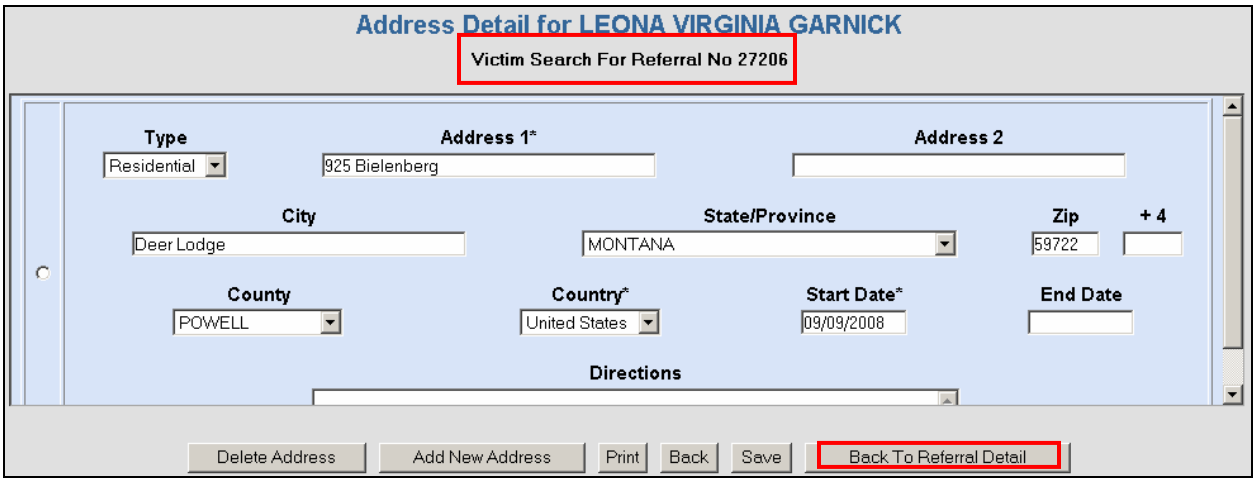
2) On the Person Search page, enter your search criteria and then click the Search button to access Person Search Results:



3) On the Person Search Results page, click the radio button in front of the person and then click the View Person Detail button to access Person Detail:



4) On the Person Detail page, click the Address Detail button in the Address section to access Address Details:



5) On the Address Detail page, you can click the Add New Address button to access the Add New Address page. Once you have entered the new address, click the Back button to go back to the Address Detail page (displayed below). Notice that you are still on "Victim Search" – click the Back to Referral Detail button to return to the referral.