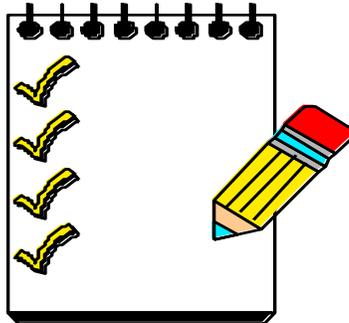
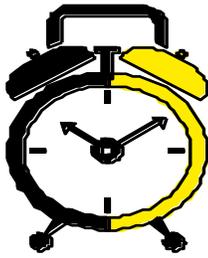


MAINTENANCE

Caseload Management

Client History Screens



MA-02

- Caseload List is accessible from any screen in CAPS by pressing the F4 key
 - Only the worker and their supervisor will be able to view the CSLL (Caseload List)
- Selecting a client will take the worker to the CLID (Client Detail) screen
 - The selected client's information will be carried from screen to screen until another CAPS ID is entered in the header
- Selecting a report will take the worker to the RRD1 (Report/Request Intake Detail 1) screen
- Alerts will be a handy tool for managing the needs of a case
 - Check your ALER screen frequently

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: _
  
```

- 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

- 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, Report, or any Worker generated alerts

- 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 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

AKAD - Person Name AKA Detail

```

CAFSAKAD                PERSON NAME AKA DETAIL                07/18/2016    12:00
USER ID : C81285        MODIFY                                PAGE NO :    1
CAPS ID : 00001655     25                NAME : DOE, JAYNE
----- LAST ----- -- FIRST --- -- MIDDLE --  SUFX
DECLARED PERSON NAME : DOE                                JAYNE
MAIDEN NAME           : SMITH
LEGAL NAME            :

  OPTIONS - _  CHANGE DECLARED PERSON NAME(DPN) & MOVE OLD DPN TO AKA
            -  CHANGE SPELLING OF LEGAL NAME
            -  CHANGE LEGAL NAME & MOVE OLD LEGAL NAME TO AKA

TO SELECT, ENTER A=ADD, D=DELETE, M=MODIFY
SEL ----- LAST ----- -- FIRST --- -- MIDDLE --  SUFX    MIND    COMMENTS
-   DOE                JANE
-
-
-

```

PATH: _

- Each person has a DECLARED PERSON NAME - the first one entered on CAPS
- Select which action you wish to perform from the OPTIONS list
- Additional AKA names can be added to the bottom of the screen
- Only the designated regional “AKA” supertask workers have the authority to DELETE or MODIFY an AKA name at the bottom of the screen
- Any name that is displayed on AKAD can be located through the PERS (Person Search) process
- CCUBS NAME will only be displayed for names that were selected by a CAPS licensing worker through the resolution process. They are additional names known to the CCUBS (Child Care Under the Big Sky) system

EVEL - Event List

```
CAFSEVEL                      EVENT LIST                      07/11/2016    10:04
USER ID : C74142SW                      PAGE: 1
CAPS ID : 00001654    00    NAME: DOE, ANNETTE

START FROM:                      EVENT CODE:

  DATE      EVENT CODE  SUB CODE  SCREEN NAME      DESCRIPTION:
07/08/2016  SRV          CRT      CRTD
TLC OCCURED ON 04/28/2016, DISPOSITION WAS TLC.
06/30/2016  IVE          APP      FINS
INI IV-E DETERMINATION APPROVED ON 06/30/2016.
06/30/2016  IVE          INI      DETL
INI IV-E DETERMINATION INITIATED ON 06/30/2016.
06/29/2016  SRV          IND      SERL
IN HOME SERVICE DELETED ON 06/30/2016
06/29/2016  SRV          INE      SERN
IN HOME SERVICE ENDED ON 06/30/2016
06/29/2016  SRV          INA      SERN
IN HOME SERVICE ADDED ON 06/01/2016 DUE TO PHA
06/29/2016  PLC          RML      PLAD
PLCMT STARTED 05/01/2016 WHERE DRUG USE IN REMOVAL HOME IS N

PATH: _____
```

- Display a list of events for a specific client
 - Events are initiated by various functions that occur in CAPS

- You may view all events or sort by event types, a starting date or both
 - For a specific time period, enter the START FROM date
 - For specific types of applications, enter up to 5 type codes in the EVENT CODE field
 - Enter both a start date and type(s) for a more specific list

- The screen is for inquiry only

SEAL - See All Client Screens

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

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

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

MIPD – Minors in Possession Detail

```

CAFSMIPD          MINORS IN POSSESSION DETAIL          07/06/2016    11:41
USER ID : C74142CH MODIFY          PAGE NO: 1
CAPS ID : 00001217 00 NAME: PICKLE, PAIGE

LAST NAME: PICKLE          FIRST: PAIGE          MIDDLE:
-----ADDRESS-----
LINE 1 : 754 RIVER ROCK RD          BIRTHDATE: 11/11/2001 AGE: 14
LINE 2 :          SEX : F HEIGHT:          WEIGHT:
CITY : HELENA          HAIR:
STATE : MT ZIP CODE : 59602 -          EYES:
COUNTY : 25 LEWIS & CLARK

-----
TO SELECT ENTER A=ADD, D=DELETE, M=MODIFY TOTAL MIP CITATIONS ON RECORD: 1

  CITN   CITATION   TICKET   DATE   COURT YTH   SENT   AGE AT
SEL CNTY   DATE   ISSUED BY   OFN   CONVICTED   APPEARED   CD   CITN
  -    25    05/12/2016   CPOLICE   MIP1    05/21/2016   YC07401   GU1   14
  NOTES:
  -
  NOTES:
  -
  NOTES:

                                          PATH: _
  
```

- This screen displays all MIP citations where the youth was convicted.
- If an MIP detail is entered for an individual that is assigned to a worker as a client or as an open juvenile on a probation referral, the worker will receive an alert notifying them of the new information
 - CO2003 = MIP Citation Issued on “DATE” for CAPS ID “ID#”
- Information on this screen is entered by Chemical Dependency/Court Staff workers. The assigned worker will only be able to view the records on the list. No modify of the details will be allowed
- Once an MIP detail is updated on this screen, the system will create a “L” type (law enforcement) address type on the ADDL screen. These address types cannot be modified or deleted

SPTK - Supervisory Task List

CAFSSPTK		SUPERVISORY TASK LIST			07/18/2016	15:17
USER ID : C81285		STARTING LOCATION: RG3			OR	PAGE NO: 1
LOC SUPERTASK					OR	SUPERTASK CODE:
CODE	CD	DESCRIPTION	LVL	USER-ID	USER-NM	STF TYP
RG3	CWA	CLIENT WRITE ACCESS	P	C74143RA	ADMINISTRATOR, REGIONAL	CAA
RG3	CWA	CLIENT WRITE ACCESS	S	C74149FA	WORKER, CFA	CFA
RG3	CWA	CLIENT WRITE ACCESS	S	C74149F2	WORKER, CFA	CFA
RG3	CWA	CLIENT WRITE ACCESS	S	C74149R3	WORKER, CFA	CFA
RG3	PAP	PAYMENT APPROVAL	P	C70303CA	ADMINISTRATOR, REGIONAL	CAA
RG3	PAP	PAYMENT APPROVAL	S	C74143RA	ADMINISTRATOR, REGIONAL	CAA
RG3	PAP	PAYMENT APPROVAL	S	C74143CS	SUPERVISOR, COUNTY	CAC
RG3	PAP	PAYMENT APPROVAL	S	C74143S	SUPERVISOR, FRS	CRA
RG3	PFA	PROVIDER FACILITY APP	P	C74143S	SUPERVISOR, FRS	CRA
RG3	TAP	TRIBAL PAYMENT APPROV	P	C70303TR	TRIBAL WORKER, CTR	CTR

-

PATH:

- This screen displays all of the workers that have a particular “supertask” assigned to them
 - A supertask is a certain function in CAPS, and only those workers that hold that designated supertask have the ability to perform that task. For example, “payment release” or “report review committee”
- Workers can search for supertasks by entering a STARTING LOCATION
 - For example, if a worker wanted to identify the supertask workers in county 25, they can enter 025 in the location field and the system would list all of the supertask workers for county 25
- Workers can search for supertasks by entering a SUPERTASK CODE
 - For example, if a worker wanted to identify the primary AKA supertask for their region, they can enter ‘AKA’ in the code field and the system would list all of the AKA supertask workers