

PERSON AND CLIENT INFORMATION

Person Search & Details

Assignments/Transfers

Caseload List

Client History

Person Search



RR-02

- The database contains all persons with a CAPS ID
- Search for all people before entering them into the system
- After search criteria is entered, a list of potential matches will be displayed
- A person with a CAPS ID does not have to be made a client in CAPS
- A person becomes a client when:
 - A CAPS ID has been assigned to a worker on the AXED (Assignments/Transfers Detail) screen

PERS - Person Search

```
CAFSPERS                PERSON SEARCH                07/13/2016    11:59
USER ID : C84852
CAPS ID : 00002107    25    NAME: DOE, JUNIOR

                        LAST NAME : pickle
                        FIRST NAME : p
                        MIDDLE NAME :
                        PHONETIC SEARCH : N

                        SSN :

                        DATE OF BIRTH :

                        RESIDENCE COUNTY :

                        SEX :

                        CAPS ID :

                                                                PATH:
```

- Use this screen to lookup or find out if a person is known to CAPS. If the person is already in CAPS, do not add the person again.
 - Type search criteria, press ENTER
 - PERL (Person List) will display a list of all persons known to CAPS, beginning with the person on the list *directly prior to those that match the name search criteria*, or a message displays indicating no matches were found

- Search criteria is one of the following:
 - Name, SSN, or CAPS ID
 - If the search criteria entered is the CAPS ID or SSN, only an exact match will be displayed if a match exists.
 - The name search can also be more refined by entering a combination of item (e.g. Last name and Date of Birth)

- Search by:
 1. SSN or CAPS ID, if available
 2. Last Name (as little as one letter can be used to do a search). CAPS will do an alphabetic search based on the character(s) you've entered.
 3. Last Name (or partial Last Name) with Y entered in the Phonetic Search. Useful for multiple word names & names that could be spelled/entered different ways.

- If a name contains a space, CAPS sorts it before the A's, alphabetically.

PERL - Person List

```

CAFSPerl                PERSON LIST                07/06/2016    9:19
USER ID : C81285        PAGE NO: 2    MORE
CAPS ID : 00000000    00    NAME:

TO SELECT, ENTER S=SELECT, I=INQUIRE OR M=MODIFY

SEL  CAPS ID  NAME                                DOB      AGE SEX  SSN      CNTY  CAN
                                /P C A
-----
00001214  PICKLE, PARKER                10/10/2010  5  M  352-15-2351
00001215  PICKLE, PATRICIA              02/05/2007  9  F  685-23-6985
00001209  PICKLE, PATTY                 03/25/1980  36 F  951-59-5159
00001212  PICKLE, PAUL                  02/15/2007  9  M  965-89-6589  15
00001211  PICKLE, PAULA                 08/05/2003  12 F  365-23-6523  25
00001218  PICKLE, PAYTON                05/15/1995  21 M  582-58-5258  15
00001221  PICKLE, PEARCE                05/05/1990  26 M  658-52-1473
00001224  PICKLE, PEARL                 10/10/2011  4  F  852-14-6397

CAN/P: Child Abuse Neglect/Provider
- C = Involved in a CPS investigation where allegations were
  substantiated, and then took off.
- P = Person associated to a licensed provider/facility. Could be a
  group home employee, foster parent, etc.
- B = Both (C + P both apply to this individual)

PATH: _
  
```

A person's CAPS ID stays the same forever.

- Displays info for persons that met the search criteria entered on PERS; if searching on name info, also displays the previous name, alphabetically
- The select functions are listed at the top of the screen under the CAPS ID and NAME
- To change any detailed information for the person, type “M” in the SEL field next to the person for whom you want to modify information and the PERD screen will be displayed
- If a person is selected with an “I”, PERD will be displayed in INQUIRE only - no changes may be made at this time
- “S” (select) can only be used if an F12 lookup is being done from CAPS ID field on another screen. This will “select” the person and bring the info back to the other screen.
- If person exists/is listed on PERL, use it. Have the assigned worker transfer if necessary.
- To add a new person to the database, press F11
 - The PERD (Person Detail) screen will be displayed in ADD mode
- F2 will return you back to PERS (Person Search)

PERD - Person Detail

PERD - Person Detail

07/14/2010 10:40

CAFSPERD PERSON DETAIL

USER ID : C84852 ADD

CAPS ID : 00000000 00 NAME:

LAST NAME : pickle

FIRST NAME : paxton AKA:

MIDDLE NAME : CAN:

SUFFIX : P SSN VERIF:

SEL P/S-- SSN ---- SEL P/S-- SSN ----

a p 123456789

DRIVERS LICENSE ST: - NUMBER:

BIRTH DT : 01011999 VERIF: AGE: 0

PLACE :

DATE DECEASED :

SEX CODE : m

ETHNICITY : ca

HSPNC ORGN : n IDENTITY VERIF:

MARITAL STATUS: nm DATE: |

ASSIGNED WORKER INFORMATION

WORKER ID: RGN: CNTY:

NAME:

PHONE NO: EXT:

SECONDARY:

----- ADDRESS -----

LINE1 :

LINE2 :

CITY :

STATE : ZIP CODE : -

COUNTY:

TELEPHONE :

IV-E WAIVER: N

EMPLOYMENT

NAME :

PHONE: INCOME :

OCC: STATUS :

START DATE:

END DATE:

PATH:

Display only (AXED).
If blank, person is not a client.

Display only (ADDL/D)

Display only (EMPL)

A(dd)
P(rietary)
(SSN)

Display only on PERD

- The Person Detail screen is used to enter or display general information about persons in the system
 - This information is available to all workers
- If the ADD function (F11) was performed on PERL, CAPS will assign the CAPS ID when you press ENTER to update the screen. After Enter is pressed, you can F11 on PERD to add another person, as long as the last name is the same.
- For SSN's, indicate on the select field A (ADD), M(MODIFY), D(DELETE) and whether it is a P(Primary) or S(Secondary)
- ASSIGNED WORKER INFORMATION will be displayed once the person has been assigned to a worker on AXED (Assignment/Transfers Detail). Can also show as LAST ASSIGNED WORKER
- RESIDENT ADDRESS information will be displayed once the ADDD screen is completed
- EMPLOYMENT information will be displayed once the EMPL screen is completed
- Last Name and First Name are the only fields required in order to create a CAPS ID

- Verifications for SSN and Date of Birth are received through an interface with the CHIMES system. Verifications for Identity are received through an interface with CHIMES, or entered by IVE unit staff. These verification fields are populated when the person is a Client, going into paid care, who has applied for Medicaid. These items verified via Interface (IN) cannot be updated in CAPS.

```

CAFSPERD                PERSON DETAIL                07/14/2016   10:40
USER ID : C84852      ADD
CAPS ID : 00000000   00      NAME:

LAST NAME  : pickle                ASSIGNED WORKER INFORMATION
FIRST NAME : paxton                WORKER ID:          RGN:    CNTY:
MIDDLE NAME:                   CAN:                NAME:
SUFFIX    :                   P SSN VERIF:        PHONE NO:          EXT:
SEL P/S-- SSN ---- SEL P/S-- SSN ---- SECONDARY:
a p 123456789
DRIVERS LIC ST: -      NUMBER:          ----- ADDRESS -----
BIRTH DT  : 01011999   VERIF:        AGE:    0   LINE1 :
PLACE    :                   LINE2 :
DATE DECEASED :                   CITY  :
SEX CODE  : m                   STATE :          ZIP CODE :  -
ETHNICITY : ca                   COUNTY:
HSPNC ORGN : n   IDENTITY VERIF:        TELEPHONE :
MARITAL STATUS: nm DATE:          IV-E WAIVER: N
----- EMPLOYMENT -----
NAME :                   STATUS :
PHONE:                   INCOME :      START DATE:
OCC:                   END DATE:
PATH:

```

Up to 6
ETHNICITY
codes
allowed.
Required for
clients.

- Up to six (6) ethnicity codes can be entered in the ETHNICITY field. When the worker presses F12 (code table lookup), six codes can be selected at one time. ABANDONED AT BIRTH, DECLINED, PARENT(S) INCAPACITATED and DECLINED are options.
- When Ethnicity field is entered, HSPNC ORGN field becomes required. Choices are Y, N, D, or U. Guidelines for this field are as follows:
 - 1) Type Y if the person is a Mexican, Puerto Rican, Central or South American person or person of other Spanish origin, regardless of race.
 - 2) The U means UNABLE TO DETERMINE and should be used rarely - only if the child is very young or is severely disabled and no person is available to determine whether or not the child is of Hispanic origin.
 - 3) The D means DECLINED and should be used if the person/client declines to provide this information.

CPHL - Client Placement History List

```
CAFSCPHL          CLIENT PLACEMENT HISTORY LIST          07/11/2016   13:25
USER ID : C74152                                     PAGE NO: 001
CAPS ID : 00001607      00      NAME: ELBOW, EDWARD

TO SELECT  ENTER I=INQUIRE, M=MODIFY                TO ADD=F11 + FASTPATH
                                                    EXIT
S  TYPE  FACILITY  FACILITY / PERSON NAME  START DATE  END DATE  RSN
_  FCARE 0001074 001 GRIFFIN FOSTER HOME      04/01/2016 04/02/2016 RTH
_  FCARE 0001054 001 FINKLE FOSTER HOME      12/30/2015 04/01/2016 PBD
_  FCARE 0001056 001 HINKLE FOSTER HOME      12/15/2015 12/30/2015 PBD
_  FCARE 0001071 001 GOLDEN FOSTER HOME     11/01/2015 12/15/2015 PBD

-

SHIFT+F1=ACCEPT                                     PATH:
```

- This screen displays all a specific clients placements
- You can add a placement by typing the appropriate screen in the path and pressing F11, the system will take you to the appropriate placement screen in ADD mode
 - PLAD (Placement Detail) – foster care, shelter care, group home, etc
 - ADOD (Adoption Detail)
 - GARD (Guardianship Detail)
 - JJPD (Juvenile Justice Placement Detail) – Pine Hills & Riverside ONLY
 - JDET (Detention Placement Detail)

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

Remember to Shift+F4 to Confirm your entry!

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.

- 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)

CSLL - Caseload List

```

CAFSCSL          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
-   00001130  DINKLE KIDS     10/03/14    A
-   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
- 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 or RRD1 will be displayed depending on if the selection is a client or a 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 or report to enter the new worker number for transfer

CLID - Client Detail

```
CAFSCSID          CLIENT DETAIL          07/11/2016    11:58
USER ID : C74142SW MODIFY
CAPS ID : 00001654    00    NAME: DOE, ANNETTE

ADDRESS LINE1 : 345 FARKLE RD          OPEN FOR SERVICE (Y/N) : Y
ADDRESS LINE2 :                          EFFECTIVE DATE : 05/01/2016
CITY          : HELENA                  CLOSURE DATE : 99/99/9999
STATE/ ZIP    : MT 59601 -             CLNT CATEGORY : CH CHILD
TELEPHONE    :                          FINANCIAL CNTY: 25 LEWIS & CLARK
WHOSE ADDRESS : PLP PLACEMENT PROVID   PLACEMENT TYPE: OUT OF HOME CARE

HEIGHT       : 5 2    WEIGHT : 105    EMERGENCY CONTACT PHONE: 406 444-5678
HAIR         : BRN BROWN                NAME : NANCY DOE (AUNT)
EYES         : GRN GREEN                BIRTHMOTHER MARRIED AT TIME OF BIRTH: N
BIRTH DATE   : 05/25/2005 AGE : 11     PREVIOUSLY ADOPTED : N AGE :
ETHNICITY    : CA                      PREGNANT - DUE DATE:
HSPNC ORGN  : N                       SPECIAL NEEDS :    NUMBER SIBLINGS: 2
RELIGION     : LUT LUTHERAN            SSN : 987-98-7987
CITIZENSHIP : US U.S. CITIZEN
SCHOOL NAME  : CR ANDERSON MIDDLE SCHOOL EXPECT TO GRAD. BY AGE 19:
CONTACT NAME : DANIEL WEBSTER
PHONE : 406 443-1234    DATE ENTERED 08/27/15 - LEFT 06/03/16    GRADE : 6
                                                    PATH: _
```

- This screen is used to capture and display detailed demographic information about a specific client

- Required fields on this screen are:
 - Birth date
 - Ethnicity
 - Hispanic Origin
 - Client Category
 - Financial County
 - Birthmother Married at Time of Birth (if Client Category is “CH” – child)
 - Previously Adopted (if Client Category is “CH” – child)

- If the ETHNICITY code is American Indian (AI) or Alaskan Native (AN) the system will automatically take you to the ICWD (Indian Child Welfare Detail) screen
 - Not required for DOC clients

ADDL -Address List

```
CAFSADDL                ADDRESS LIST                07/18/2016    11:50
USER ID : C81285                PAGE NO:      1
CAPS ID : 00001654    00    NAME: DOE, ANNETTE

TO SELECT, ENTER I=INQUIRE, M=MODIFY OR D=DELETE

      START
SEL  DATE    ACT TYP  ADDRESS                CITY                ST  DIR
-   05/01/16  Y   P   345 FARKLE RD        HELENA              MT
-   05/01/16  Y   R   754 RIVER ROCK DR   HELENA              MT

                                     PATH: _
```

- The Address List screen is used to display a history of addresses associated to a person in the CAPS system
 - The most recent record is displayed at the top of the list
 - The person may have only one open MAILING address, only one open RESIDENCE address but you may have multiple ALTERNATE addresses at a time
- On this screen you can INQUIRE, MODIFY or DELETE an address

RELL - Relationship List

```
CAFSRELL                                RELATIONSHIP LIST                                06/30/2016    9:58
USER ID : C74142SW MODIFY                PAGE NO:      1
CAPS ID : 00001654    00    NAME: DOE, ANNETTE

TO SELECT, ENTER I=INQUIRE, M=MODIFY, C=COPY OR D=DELETE
REL                                     --INDICATORS--
SEL TYP DESCRIPTION                     NAME                     HH PCLC FR SD CAPS ID
_  BMR  BIRTH MOTHER                    DOE, JANE                S  N  N  N    00001655
_  BRO  BROTHER                          DOE, CARL                 N  N  N    00001657
_  SIS  SISTER                            DOE, BRANDY              N  N  N    00001656

                                           PATH: _
```

- This screen will display a list of other persons in the system that are associated with a specific person and describe their relationship to that person
- A person must have a CAPS ID in order to form a relationship with a primary person
- You can INQUIRE, MODIFY, COPY or DELETE relationship information
 - The primary person in the relationship is the person to whom all other persons are being associated
 - You can “C” (COPY) certain details to be associated with multiple people
- To ADD a person you would use the F11 function and add on the RELD (Relationship Detail) screen
 - If you do not know the CAPS ID for a person you want to ADD then you will have to do a person search
- If a person’s relationship is perpetrator then a relationship of perpetrator would be indicated in the secured description on RELD
 - The reverse relationship will be created for the victim to the perpetrator

RELD - Relationship Detail

```
CAFSRELD                RELATIONSHIP DETAIL                06/30/2016    9:54
USER ID : C74142SW MODIFY
CAPS ID : 00001654    00    NAME: DOE, ANNETTE

PRIMARY PERSON CAPS ID : 00001654 NAME : DOE, ANNETTE
                                ADDRESS: 345 FARKLE RD
                                HELENA                MT 59601 -
-----
PERSON ASSOC W/PRIMARY : 00001655 NAME : DOE, JANE
HOUSEHOLD IND (O/S)   : S    ADDRESS: 754 RIVER ROCK DR
PHYSICAL CUSTODY      : N
LEGAL CUSTODY         : N    HELENA                MT 59602 - 0240
FINANCIALLY RESPONSIBLE: N

RELATIONSHIP TYPE     : BMR  BIRTH MOTHER
SECURED DESCRIPTION   :

COMMENTS :

SHFT+F12=FILL

                                PATH: _
```

- This screen is used to DISPLAY, MODIFY or ADD detail relationship information for a person who is related to a primary person
- The secured description field is only accessible to a worker with the appropriate security
 - This information can describe the relationship to a person, such as victim, perpetrator or possibly both
- After updating on RELD, additional relationships can be added to the primary by pressing the F11 key

EMPL - Employment History

```
CAFSEMP      EMPLOYMENT HISTORY      07/11/2016      10:01
USER ID : C74142SW MODIFY      PAGE NO: 1
CAPS ID : 00001655 25      NAME: DOE, JANE

TO SELECT, A=ADD, M=MODIFY OR D=DELETE
SEL
- PROVIDER NUMBER :
  NAME : WALMART      PHONE:
  ADDR1: 123 PROSPECT      START DATE: 01/05/2016
  ADDR2:      END DATE: 99/99/9999
  CITY : HELENA      STATE: MT      ZIP CODE: 56901 -
  OCC: CUSTOMER ASSOCIATE
  INCOME: 11.25/HR      STATUS: FT FULL-TIME
  HOURS PER MONTH: 40
- PROVIDER NUMBER :
  NAME :      PHONE:
  ADDR1:      START DATE:
  ADDR2:      END DATE:
  CITY :      STATE:      ZIP CODE: -
  OCC:
  INCOME:      STATUS:
  HOURS PER MONTH:

PATH: _
```

- This screen is used to record and display information about a person's employment
- You can ADD, MODIFY or DELETE employment information on this screen
- Enter the name of the EMPLOYER, START and END DATES (if applicable) of employment, ADDRESS, OCCUPATION and SALARY information for each job
 - Use monthly salary (before deductions) for income
- If a person is associated with a provider in CAPS, that information will display if it has been entered on PRPL (Provider Person List)
- Employment records are displayed in reverse chronological order (most current first)
 - The most current employment record will display at the bottom of the PERD (Person Detail) screen

SPND - Special Needs Detail

```

CAFSSPND                SPECIAL NEEDS DETAIL                03/31/2015    9:02
USER ID : C81285    MODIFY                PAGE NO:    1    MORE
CAPS ID : 00001485    00    NAME: WALTON, WENDY

HAS CHILD HAD A CLINICAL EXAM,
AND IF SO, WERE ANY DISABILITIES DIAGNOSED? 1 EXAM CONDUCTED; DIAGNOSED WITH
                                                CLINIC
TO SELECT, ENTER A=ADD, M=MODIFY OR D=DELETE    DIAG OR    DIAG/DOCM    RESOLVED
SEL CD    DESCRIPTION    SUB    DESCRIPTION    DOCMT?    DATE    DATE
-    AOB    ACTING OUT BEHA    ATP    HISTORY OF ASSAULT    Y    01/15/2015    99/99/9999
-    AOB    ACTING OUT BEHA    CRU    CHRONIC RUNAWAY HI
-    AOB    ACTING OUT BEHA    FIR    FIRE SETTING
-    AOB    ACTING OUT BEHA    HDP    HISTORY OF DESTRUC
-    AOB    ACTING OUT BEHA    HMA    HISTORY OF HOMICID
-    EDU    EDUCATION    Y    01/15/2015    99/99/9999
-    HAN    HISTORY OF ABUS    EDN    HISTORY OF EDUCATI
-    HAN    HISTORY OF ABUS    MDN    HISTORY OF MEDICAL
-    HAN    HISTORY OF ABUS    PHA    HISTORY OF PHYSICA
-    HAN    HISTORY OF ABUS    PHN    HISTORY OF PHYSICA
-    HAN    HISTORY OF ABUS    PSA    HISTORY OF PSYCHOL
-    HAN    HISTORY OF ABUS    PSN    HISTORY OF PSYCHOL
-    HAN    HISTORY OF ABUS    SEA    HISTORY OF SEXUAL

                                                PATH: _
  
```

- This screen is used to identify a specific client’s special needs and disabilities for service and placement matching
- You can enter generic special needs codes and then select a sub-code to provide more specific information regarding the special need
- For certain special needs codes, you must also identify if the special need has been clinically diagnosed and documented. These special needs cannot be added to the screen until this flag can be answered with a “Y” (yes)
- You can ADD, MODIFY or DELETE special needs by placing the appropriate selection on the select line

CRTL – Court List

```
CAFSCRTL                COURT LIST                07/14/2016   10:36
USER ID : C74142SW
CAPS ID : 00001181      00      NAME: ALMOND, ADAM                PAGE NO: 001

TO DISPLAY, ENTER X: X ACTIVE ONLY _ ACTIVE AND DELETED F11, ENTER TYPE:
START FROM:                COURT REASON:
TO SELECT, ENTER I=INQUIRE, M=MODIFY, OR D=DELETE
SEL TYPE HEAR/FILE DT  REASON      DISPOSITION  STS      EFFECTIVE DATES
FROM              TO
-   MNE  05/10/2012
-   CTO  05/09/2012  AFD          AFD          A          05/10/2012  99/99/9999
-   PET  04/01/2012  LTC          TLC          A          12/12/2011  99/99/9999
-   CTO  12/01/2011  TLC          TLC          A          12/12/2011  99/99/9999

PATH: _
```

- This screen displays the court events specific to a client
 - A document type must be entered before pressing F11 to add a new detail
- You may INQUIRE on a court event at any time
- MODIFY on any court reason is possible only until the COURT DISPOSITION is entered
 - Once the disposition is entered, the majority of the information on the court event becomes protected
- You can DELETE a court reason from the system. This reason will remain on the database, but will be considered INACTIVE. In order to delete, you must enter COMMENTS at the bottom of CRTD (Court Detail) for the reason you wish to inactivate, then place a “D” on the select line, press ENTER and SHIFT+F4 to confirm the delete
- By entering a START FROM date you may view COURT REASONS from a particular date forward
- You can view specific COURT REASONS by entering the COURT REASON type

CRTD – Court Detail

```
CAFSCRTD                COURT DETAIL                07/14/2016    10:24
USER ID : C71012IV MODIFY
CAPS ID : 00001654      00      NAME: DOE, ANNETTE
                                LAST UPDATED: 07/08/2016 BY: C81285

CAUSE NUMBER           : 98765
TYPE OF COURT DOCUMENT: CTO           EFFECTIVE DATES OF COURT ORDER
COURT REASON           : TLC           FROM : 05/01/2016 TO : 99/99/9999
HEARING/FILING DATE   : 04/28/2016
ADJUDICATION DATE     :                NEXT HEARING DATE :
COURT DISPOSITION     : TLC
DATE ORDER RECEIVED   : 04/29/2016
COURT JURISDICTION    : D07111
TRIBAL NOTIFICATION   :
COUNTY ATTORNEY ID   :
GUARD AD LITEM ID(1) :
GUARD AD LITEM ID(2) :

JUVENILE OFFICER ID  :
COMMITMENT TYPE      :      DOC COMMITMENT END DATE:

COMMENTS:

                                PATH:
```

- This screen is used to record details of specific COURT REASONS that involve a client
- F10 displays the RELL (Relationship List) screen and allows you to copy a COURT REASON to another client's record
- Once a disposition is entered and ENTER is pressed, a confirm message will appear at the bottom of the screen
 - Once SHIFT+F4 is pressed, most fields will be protected and cannot be changed
- An EVENT is recorded each time a COURT REASON occurs
- An alert (report to the court/court review due) will be created to the worker and the worker's supervisor 30 days prior to the NEXT HEARING DATE, if one has been entered
- Fields are enterable or non-enterable based on the type of court document being entered

ACTL – Activity List

```
CAFSACTL          ACTIVITY LIST          07/18/2016    11:25
USER ID : C81285          PAGE: 1
CAPS ID : 00001654      00    NAME: DOE, ANNETTE

TO SELECT, ENTER  I=INQUIRE OR M=MODIFY OR D=DELETE

START FROM:          END FROM:          ACTIVITY TYPE:

SEL  DATE          ACTIVITY TYPES          GOAL CODES          ENTERED BY
-   05/20/2016    VWM                    PER                 C81285
-   05/10/2016    COR                    PER                 C81285

PATH: _
```

- This screen displays the activities for a specific case or client
 - An activity is a significant contact or communication with a client or about the client that can impact the direction of the case
 - EXAMPLE: parental visits, child interview, worker home visits, phone calls
- Worker may select a specific activity to INQUIRE, MODIFY, or initiate the procedure to ADD a new activity by pressing F11
- The START FROM and END FROM fields can be used to view all activities that took place during a specific time period
- Enter an ACTIVITY TYPE(s) to view specific types of activities
- Activity details become protected seven (7) days after they are entered on the Activity Detail (ACTD) screen. If information needs to be modified or removed after seven (7) days, a supervisor must be notified.

ACTD – Activity Detail

```
CAFSACTD          ACTIVITY DETAIL          07/18/2016    11:29
USER ID : C81285   MODIFY                    ACTIVITY: 1
CAPS ID : 00001654 00   NAME: DOE, ANNETTE
REPORT # - CLIENT REFERRED FOR DD ASSESSMENT:
DATE OF ACTIVITY: 05/10/2016   ACTIVITY TYPE: COR
ENTERED BY      : C81285       PURPOSE(S)   : CPL
                                   GOAL(S)      : PER
SUMMARY: THIS IS A TEST ACTIVITY ENTRY. THIS IS WHERE A SUMMARY OF THE ACTI
VITY MAY BE ENTERED. SEVERAL LINES OF TEXT MAY BE ENTERED.

SHIFT+F2=ACT2                                          PATH:
```

- This screen is used to record and display the date of activity and the type, purpose and goal of the activity
- The Entered By field will default to the C# of the worker that is entering the activity and cannot be changed
- Up to five (5) activity codes, four (4) purpose codes and three (3) goal codes can be entered on an individual detail
- Use the summary area to summarize the activity details. If documentation concerning the activity is located elsewhere, note that in the summary
- Press F10 to display the RELL screen and copy activity details to other clients
- Press Shift + F2 to access the Activity Detail 2 (ACT2) screen where additional/continued comments may be entered

ACT2 – Activity Detail 2

```
CAFSACT2          ACTIVITY DETAIL 2          07/18/2016    11:47
USER ID : C81285   MODIFY                     PAGE NO:    1
CAPS ID : 00001654 00   NAME: DOE, ANNETTE
REPORT # - CLIENT REFERRED FOR DD ASSESSMENT:
DATE OF ACTIVITY: 05/10/2016   ACTIVITY TYPE: COR
ENTERED BY      : C81285       PURPOSE(S)   : CPL
                                      GOAL(S)     : PER
SUMMARY: THIS IS WHERE SEVERAL ADDITIONAL LINES OF TEXT/COMMENTS MAY BE
ENTERED.

F2=ACTD

PATH:
```

- This screen is used to continue comments that were initiated on the Activity Detail (ACTD) screen
- Date of Activity, Activity Type, Purpose(s) and Goal(s) can only be changed on the Activity Detail (ACTD) screen
- Multiple pages of ACT2 can be entered by pressing F11 to add