

Non-Workflow Functionality

The system has several functions that exist outside the established intake and casework workflows - many of which are capabilities that various users will want to use.

My Profile

Pressing the [My Profile] Button in the row of buttons along the top will bring up a series of tabs dedicated to the members profile itself. Much of the functionality here has to do with the configuration for the user, but it can also help the user track non-workflow related events - like keeping track of volunteer efforts.

The default 'My Profile' tab leads to specific details related to the account. Some of this is supplied to the conference membership roster and some of it is used by the system for annual report requirements detailing membership demographics.

EXIT VIEW PANE

Blaise Baxter - Unavailable

Current Conference * South Set Current Conference

My Profile Member Availability My Roles Email Preferences Volunteer Tasks

Change Password Edit

ID 9 Username BBaxter

First Blaise Last Baxter

Gender Female Ethnicity Caucasian

Age Group 40 and over

Home Phone 504-555-1212 Cell Phone

Work Phone Email sbriscoe@agularsystems.com

Emergency Contact

Address 2100 Peach St

City Jefferson State Louisiana Zip 30000


Details such as age group are used in the membership ethnographic report details submitted in the annual report. The email address is used by the system to send notifications. Current conference is a function that allows individuals to utilize a single system login and switch between conferences for which they have assigned roles. The controls for setting the current conference are found here as well. Most vincentians do NOT have more than one conference where they participate - but for those that do they will find there are times they'll need to use this screen to tell the system when they want to perform functions for one conference vs another.

Changing your password is accomplished from this screen as well. Simply click the [Change Password] button and change your password accordingly. Conference administrators have the ability to change a password for you - so if you've forgotten your password you'll want to contact them and have them reset it.

Member Availability

This tab only appears for members who have been assigned roles where scheduling and availability information is critical - namely the caseworker and secondary caseworker roles. The availability option here is designed to be a simple yet helpful method for active caseworkers to express scheduling concerns and constraints to intake decision makers - and the information is presented to those individuals when casework is being assigned.

The screenshot shows the 'Member Availability' tab for user Blaise Baxter. At the top, it says 'Blaise Baxter - Unavailable'. There's a 'Current Conference' dropdown set to 'South' and a 'Set Current Conference' button. Below are tabs for 'My Profile', 'Member Availability' (selected), 'My Roles', 'Email Preferences', and 'Volunteer Tasks'. An 'Update' button is in the top right. The main content area has a message: 'You are currently flagged as unavailable for case work. If you are now available for assignment as Case Manager, Case Worker, or Secondary Case Worker, please indicate this by checking this checkbox.' Below this is an 'Available' checkbox which is unchecked. Another message says: 'You can indicate any limitations you have concerning what kinds of cases you can work below. This will help those making case assignments make better decisions.' Below this is a 'Limitations' text input field containing 'Unavailable on 9/30 - 10/13, on a cruise'.

 **Important:** Setting yourself as 'unavailable' does not prevent cases being assigned to you. There might be good reasons a case manager decides that the case in question should head your direction. Perhaps the friend seeking assistance is a single mother and there will be a greater spiritual benefit to both of you due to your own experience as a single mother.

My Roles

The 'My Roles' tab displays the roles the account has been assigned. It is 'Read Only' - users cannot assign or resign from roles from this page. If a user is looking to pick up additional responsibilities or to resign their duties at a particular conference they should contact an administrator to have the roles assigned accordingly.

The screenshot shows the 'My Roles' tab for user Blaise Baxter. It has the same header and tabs as the previous screenshot. Below the tabs is a table with the following data:

Status	Role	Diocese	District	Conference
Assigned	Case Worker	CMSDoc	Yoknapatawpha County	South
Assigned	Conference Member	CMSDoc	Yoknapatawpha County	South
Assigned	Express Assistance Provider	CMSDoc	Yoknapatawpha County	South

Email Preferences

The Agular CMS will send email messages to individuals automatically when certain events transpire. The emails members receive are tied to the roles themselves - as are the preferences. If a role has no associated email, then users with only that role would have no email preferences to edit.

We strongly encourage you to use these settings for disabling email rather than flagging the messages as unwanted with your internet service providers. We have had issues with individuals making spam reports to larger providers resulting in many other vincentians unable to receive email.

When individuals are assigned to a role, the conference administrator responsible for setting that up has the ability to edit the email preferences at that time. If a conference did not want

secondaries to receive emails, they could simply tick those boxes and remove those options during the setup. Treasurers who do not want notifications related to assistance requests could turn those off here as well - though that's not recommended.

Edit My Email Preferences

☒ Do you want to get email when a case is initially assigned to you as the primary CW/CM?

☐ Do you want to get email when a case is assigned to you as a secondary?

☒ Do you want to get email when a case goes into the shared caseworker worklist?

☒ Do you want to get email when a case is re-assigned to you?

☐ Do you want to get email when a case you were assigned to is reopened?

☒ Do you want to get email when a treasurer acts on one of your assistance requests on a case?

☒ Do you want to get email when a message is added to an assigned case?

[Back](#) [Save](#)

To edit simply login to your account, come to this tab within your profile, and click the [Edit] button and tick the appropriate checkboxes. As members acquire new roles, system events might be associated with those roles that are tied to email notifications - so you'll want to review these settings whenever you feel you're getting messages you do not want in your inbox.

Volunteer Tasks

The 'Volunteer Tasks' tab displays all volunteer related tasks and is one of the more important non-workflow related functions in the system. The ability to add volunteer tasks for the purpose of tracking minutes and miles is important for scheduling and availability issues and for the end of year reporting. It's also useful for administrators to be able to review the amount of time different types of tasks take different people when assigning work.

Blaise Baxter - Unavailable

Current Conference: South [Set Current Conference](#)

[My Profile](#) [Member Availability](#) [My Roles](#) [Email Preferences](#) **[Volunteer Tasks](#)**

[Add Non-Member Tasks](#) [Add](#) [Edit](#) [Download CSV](#)

Date	Conference	Category	Minutes	Miles	Num Helped	Case
09/21/2017	South	Case - Client Visit	60 Minutes	10 Miles	3	2017-00123
09/21/2017	South	Case - Client Visit	60 Minutes	10 Miles		2017-00122
09/18/2017	South	Case - Client Visit	60 Minutes	10 Miles	1	2017-00079

The system comes pre-configured with a large set of volunteer tasks (collected from the actual list of tasks tracked by various installs) - which can be adjusted to include additional volunteer types specific to your Diocese if needed. Tasks that have been entered can be edited here as well - allowing users to adjust the details of their work as needed.

Caseworkers have a case-related time tracking function built into their workflow process that falls immediately after the client visit step in the process. They're able to record time and miles there for any caseworkers working on the case - and those volunteer timecard events will appear here with any other unaffiliated volunteer hour tracking entries. All volunteer miles and hours are tallied and are part of the annual report generation. There is also a function to export the volunteer details as a CSV file to be used by spreadsheet applications outside the system.

An additional feature is the ability to record non-member tasks as well. Many time special works events will involve other members of the community - neighbors and family members who are not vincentians.

VIEW PANE

Add Non-Member Task to South

Add

This will add a non-member task for one volunteer to South. If you need to add a task to any of your other conferences, change your Current Conference in My Profile and come back.

Date *

Minutes *

Number Helped *

Miles *

Category *

Comments

The details captured here are passed forward to the individual assigned the role Conference Volunteer Coordinator - who can review all of these entries, delete duplicates, and adjust them accordingly. For that reason it's important to try to include details in the comments field in an effort to give descriptive details to help in that effort.

The Conference Volunteer Coordinator can even add and edit volunteer tasks for conference members. Simply use Search->Contact Information to display a list of conference members, select one from the list of members in your conference, and add/edit their tasks accordingly.

The Search Button

The various system search functions found using the [Search] button at the top of the screen are some of the most powerful functions in the system. Individuals can check everything from “does a certain name have a client profile” to “what express assistance has been provided over a given period”. None of the search functions are required for any of the proper business rules workflows themselves - but there may be times they're used to ask questions of the data for many different purposes.



Generally - the idea of ‘Search’ is that it is not intended to generate ‘reports’ - it’s intended to help find a couple of specific cases or individuals that match certain criteria - a check your treasurer knows was written, or a case a caseworker knows they reviewed at some point but cant remember. It is a very few treasury-restricted searches that mimic *report* behavior.

For some searches (such as those associated with checks) access has been restricted based on role and by affiliation (down to the conference level). For others the nature of the needs of the user grant a broad latitude to find a corresponding match. Also, searches will only return a maximum of 20 results at a time. Returning a subset of the results if the search mask criteria is broadly defined is necessary so as not to tax the database with poorly considered requests. Refining the search criteria to get a smaller result set if possible is strongly recommended.

Cases by Case Worker

Back Help Clear Search

Note: After selecting a case, to return to the search, use the "Exit" button in the top left corner of the View Pane.

Status **Request**

Client First Name **Last Name**

Case Worker **Secondary** **Date of Request: From** **To** (Date Range)

In addition, “name” fields have a soundex relationship in the database. This means an operator typing a name into a name field will generate returns that ‘sound similar’ to that name. This is very important as often volunteers struggle with the correct spelling of client names. Search will always display what the system considers to be the best possible match first - whether based on exact name matching or other characteristics supplied in the search mask.



Note: For a complete breakdown of the different search functionality found when pressing the [Search] button at the top of the screen, details can be found under Reporting and Search in the Treasury Section later in this document.

Non-Case Express Assistance

The system supports simple non-case related pantry operations - and the simple tracking of distribution of other primarily in-kind assistance. In situations where simple forms of assistance occur outside the proper client/case logic of the workflow, this Main Menu option allows the easy accounting of this sort of help.

The primary purpose of this function is to support simple pantry-like operations. It is a distribution of aid that is usually small and with a very low threshold of eligibility checking. Those being helped in these situations do not go through the entire case process - there are no home visits - it is often simply a hungry family and a bag of food.

Workers who have been given the express assistance provider role have the express assistance option in their Main Menu . Selecting this will bring up this single screen for the capture of simple mostly non-required details. If a conference wants to require particular information it will not be enforced in the software.

Resource*	Estimated Retail Value*	Comments
Select		

This is a very simple method of collecting some rudimentary but non-required information - and what sort of assistance was provided - all without having to invoke the case management system at all. Often details are recorded by pantry workers onsite without access to CMS at all - and the data entered in bulk after the fact.

Another element of this system is the ability to generate an eligibility list - based on a number of criteria set by the conference. One or more conference members are assigned the express assistance manager role which has the ability to perform the list generation. If assigned to this role, the option ‘Prepare Inkind Eligibility Report’ appears in the Main Menu for that user. Selecting this item brings up a simple screen that lets them generate an inkind eligibility file for use by express assistance providers.

Transactions by Type in South

Generate Report

Download Current Report

Current report created on 10/6/2017 08:51:26 PM by BBrentwood

Coverage Area *

Conference

▼

Time Frame *

3 Months

▼

Different conferences have widely different rules when it comes to eligibility assessments, the list generation is done on a per conference basis. The report has two options: the coverage area allows the manager to select whether the restrictions are only applied to those who've been served specifically and only by the conference itself, within a specific zipcode, or across the entire diocese. The second option is the time frame for exclusion - and for ease of use it allows 1 month, 3 months, 6 months, or a period that can be set by the manager.

	A	B	C	D	E	F	G	H
1	Name	Type	Est. Value	Date	DOB	SSN	Household	Conference
2	Redding, Tony	Food	50	4/11/2017	7/8/1953		2	North
3	Savage, Terry	Food	100	6/13/2017	4/8/1961		4	South
4	Smith, John	Food	50	4/16/2017			4	South
5	Harris, Pete	Food	50	6/13/2017	8/14/1976		2	South

When [Generate Report] is pressed - a new singular CSV is now available for your conference. Any express assistance provider going to their Express Assistance page will have a button to download this file - and use it appropriately.

The list is available to any express assistance provider by clicking on the [Download Current Report] button from the express assistance screen. The CSV can be opened in any spreadsheet program - sorted and or printed - and made available to anyone working in a pantry or other offline express assistance scenario. Only the most recently generated list is available to the conference users as older versions should have no value. Express assistance providers simply use this list to review past inkind assistance based on the rules determined by conference leadership which were used to generate the list.



Note: If the user is assigned the express assistance role for multiple conferences, they will need to be sure to select the conference for which the assistance is to be assigned when entering the details. Also, if assistance is entered into the system mistakenly and needs to be deleted any user who has the express assistance role for that conference may search for the transaction itself using the express assistance search found from the [Search] button at the top of the screen and delete the record by selecting it and then pressing [Delete].

Diocese Eligibility Auditing

There is a role assigned to the process of reviewing and managing the application of fraud tags to client records. These warning admonitions are referred to as Red Flags - and those assigned as eligibility auditors have the right to review, apply, and remove these flags diocese wide. Diocese administrators may assign this role to trusted conference level vincentian members at their discretion. Otherwise it is up to the diocese to manage the review process in a centralized manner.

Those assigned to the auditor role will have a new item appear in their Main Menu called 'Red Flag Audit'. By clicking this - it will bring up a worklist of any petitions made by any users to either add or lift a red flag from a client record. Any auditor may make a decision on this list - it is a shared worklist amongst all auditors in the diocese.

Red Flag Audit							
Type	Date	Client	Case No	Requestor	Conference	Review Date	Auditor
Add Red Flag	10/06/2017	Johnson, Todd	2017-00126	Beetle, Brad	South		

When reviewing the approval, the auditor has the ability to review the case of origin and the notes from the worker making the request, and make a decision. They have the ability to lift a flag, keep a flag (denying the request to remove it), or approve the flag. Details such as who last approved the flag and the time of that assessment are also available.

Approve: Add Red Flag

Red Flagging
Profile
Household
Employment
Past Assistance
Cases - No Assistance

Red-Flagged by
Last Review by
Review Date

The client was encountered via case 2017-00126. Use the button above to review this case. Use the red EXIT button to return here.

Below is the reason Brad Beetle gave for requesting that this client be red flagged. Please make the appropriate edits for the record, if you decide to keep the red flag.

Went to this person's home. Dangerously unsafe. We left after only 10 minutes.

Auditors may also use topline client search - find clients - and use the [Change Status] button to alter the redflag status of a client without anyone asking for it to be applied or removed. This is also used to correct duplicate entries in the system or to remove the Active status of client records.

Adding Clients for the Purpose of Red Flagging

There are times when a conference will get notices from other local charitable organizations of individuals to be on the lookout for. Whereas this is not a core direction of the product, the product can be used to supply this sort of information to conferences across the Diocese.

Create Client - Records Management

Clients are normally created through the case flow, by the case worker after the initial visit.

However, on an exception basis, it is possible to create a client here as well.

If you have ascertained that the client does not exist via the search in the previous screen, you can proceed to create that client here.

Status *

First Name * MI Last Name * Maiden Name

Gender * Marital Status * DOB SSN U

Ethnicity * Church

Conference leadership (treasurers, presidents etc) have a [Create] button from topline Search -> Clients. This allows them to add client record information into the system and set the status of the individual to Red Flagged. To do so select 'Red Flagged' from the available options in the 'Status' pulldown.

Adding Addresses for the Purpose of Red Flagging

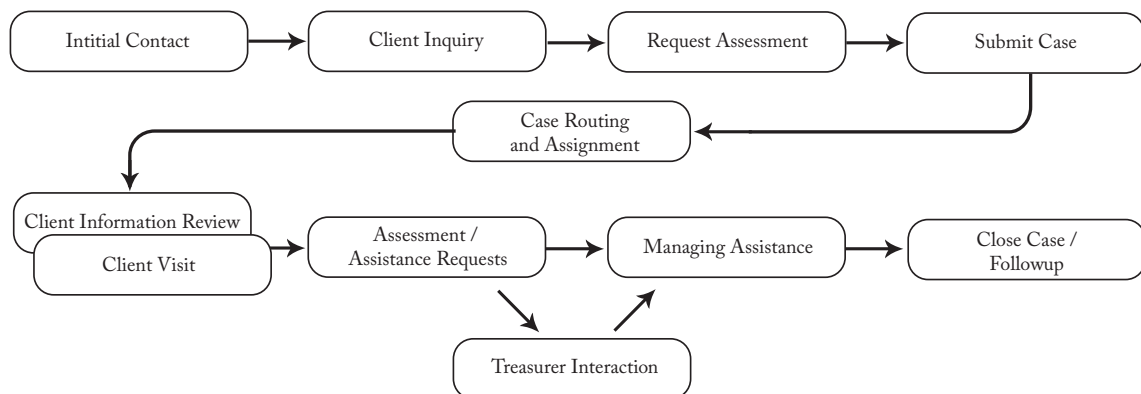
The system is also capable of tracking addresses that SVdP do not wish to work with. There are landlords who have sought to secure free rent for tenants through encouraging calls to their local Vincentian conferences etc...

The screenshot shows the 'Diocese Configuration Objects' interface. At the top, there is a 'Manage:' dropdown menu set to 'Red Flagged Addresses' and a 'Filter' input field. Below this is a section titled 'Red Flagged Address' containing a table with two rows of addresses: '1900 Gelpi Jefferson LA 30000' and '3449 River Rd Jefferson LA 30000'. A link '- Add Red Flagged Address -' is visible above the table. Below the table is a detailed form for editing a 'Red Flagged Address'. This form includes fields for 'Street *' (1900 Gelpi), 'City *' (Jefferson), 'State' (Louisiana), and 'Zip' (30000). It also has 'Reasons *' with checkboxes for 'Fraudulent Building Ownership' (checked) and 'Unsafe Neighborhood' (unchecked). A 'Comments' text area contains the text 'Landlord offers free rent through contacting local SVDP'. 'Update' and 'Delete' buttons are located at the top right of the form. At the bottom of the form, a note states: 'Street addresses will be matched according to the following breakdown of the street address above:'.

Adding and editing them is easy - but this effort should be considered carefully and can only be performed by the diocese administrator role.

Basic Workflow

It is important to understand the basic workflow functionality of the entire process to appreciate how the system works. Many conferences are used to an ad hoc system of emails and phonecalls between volunteers to manage the process, or shared spreadsheets.



The goal of building this system was to improve the organization's ability to tactically service the needs of people, improve the record keeping to allow for better insight into strategic needs, and provide details that might better help with the pursuit of grants and funding. At each step along the path the volunteer is presented an optimal 'next step' - helping them to move through the process and ease the result into a degree of standardization. There are many obvious advantages to using a state driven workflow engine that collects the right information at each stage of a process.

Many conferences record actions by hand or manage as best they can with email, shared online documents, or with simple volunteer built websites - but with the legal landscape of having to satisfy government reporting and accountability those solutions are potentially problematic. On the other hand, this system encapsulates everything a conference needs to properly execute the St Vincent mission - and as such should improve the volunteer's ability to make a positive change in the lives of those they service. Whether considering the accountability and reporting functionality that is dramatically enhanced over the use of spreadsheets or email - or the increased speed gained through the decision maker's transparency to the process - the end result is that using a system such as the Angular CMS for SVdP has a big impact.

- The speed of quick eligibility assessment afforded by a system that aggregates all the client data across the diocese.
- The speed of being able to push a button at the end of a month and generate reports in line with those requested by the national organization.
- The collection of data on clients that allows for the tracking of individuals over time, leading to improved understanding and a better ability to assess a person's situational needs and find ways to help them get back on their feet in what are often time-sensitive situations.