Prepare Tab

The first step in the caseworker workflow is to prepare for the home visit. Much of the navigational system concepts on display here are the same as those found in intake - with the addition of an accordion system to represent multiple pages of information relative to the case that can be retrieved at need. During preparation the Caseworker will likely wish to review the client information collected during intake and possibly alter it based on their own needs.

Everything intake has collected is here - including links to the client record if appropriate - and details related to the assistance request. Once familiarized with the client profile, any differences between it and an existing client record, and the nature of the request, the caseworker can retrieve a map to the individual's residence, print a casework home visit form, and select [Next] to alert the system that it is now awaiting the result of the home visit.

Secondary Caseworkers and Reassignment
The Case Options screen, reached by pressing the [Case Options] button along the top, is typically used to get a complete overview of the case itself. It lets the caseworker review each tab's information in a read-only format, giving them a quick ability to move from section to section. Caseworkers can also print the 3-page version of the CRF from here.

One other function of the Case Options screen is the ability to reassign caseworkers and assign secondaries. There are times when a caseworker has been assigned a case and, after review, the caseworker does not feel they're able to perform the task. Caseworkers are volunteers, and it is also very common for real life problems to intervene, rendering them unable to continue with casework that could be in any stage along the process.

To reassign the case, or to assign secondaries to this case, imply choose a new worker from the appropriate dropdown for the conference and press the [Reassign] button.

One SVdP best practice is that home visits must be performed in tandem with a second Vincentian. Assigning a partner for the case is also accomplished by simply selecting the secondary from the dropdown list. Every account with the conference member role is eligible for secondary assignment. This allows administrators to create users in the system who have no assigned system work to perform - but can be dropped into the role of ridealongs. These non-login users can have their time tracked through the case as well, allowing you to easily track the volunteer hours and miles these individuals contribute without them having to ever use the CMS system.

Editing the Intake Profile

By selecting the Client accordion element, the caseworker can easily review the client profile as it was recorded in the intake process. Data here can be edited and saved as well, and if the profile was mapped to an existing client record in the system the two can be compared. This gives the caseworker a chance to amend the collected information prior to the visit. To record changes simply enter them in the text fields and press the [Save] button at the top.
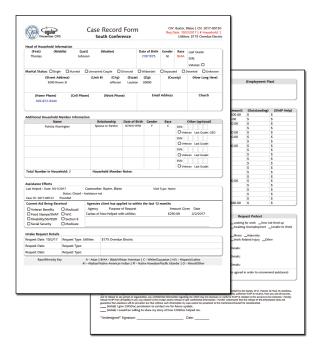

Note: Details that are found within a matched client record will appear on the printed Case Record Form regardless of whether they were entered on the intake profile. They do not need to be copied over at this point. There is a later stage post-visit where blank elements in the client profile can be absorbed from the client record for the purpose of updating the file - but it best to make those changes after visiting with the person and making sure the profile information reflects the correct client in the system.

Caseworkers will want to be sure to carefully review the differences in data between that recorded during intake and that already stored in the client record - as well as any past assistance or request details that have been passed forward. The Caseworker has accordions giving them access to the entirety of the Assistance Request as recorded by Intake, as well as any history of prior assistance related to the client record itself.

Printed Case Record Form

This form is the form used by the district by Caseworkers when conducting home interviews. It is pre-populated with whatever data has been entered in the client profile.

The form here is Agular's best take at what sort of details are collectible and representable within the CMS system. It may change over time based on the aggregate feedback of the user community. It is more detailed than the home visitation forms available from the national SVdP website and should help the Vincentians to better assess the needs of the requester.

The case record form prints everything the case thinks it knows about the client - and it's up to the Caseworker to validate, update, and augment the data with the details collected during in the interview process.

Details that were collected during intake will appear in black. Details that are legacy from the existing case record (if available) will be displayed in red. Details that were captured during intake but differ from those in the client record are in blue. These forms can be printed at any point in the casework process by visiting the [Case Options] button at the top - and information collected up to that point will be captured in the newly printed form.

Example: The more details intake capture on John and Sally Droid, the more likely they'll find the right Droid in the system (if there is one). However, it is quite possible (though infrequent) that intake will make one call relative to whether an individual is best served within the confines of an existing case record - and the caseworker on scene will make a different determination. For example, there could be a divorce where suddenly a household member is now looking for help outside the existing on-record household. Regardless of how much effort has been made to identify a client prior to going on a visit a discovery can be made that the person in question is someone else entirely. These may not be the Droids you were looking for. This is why up to this point the collected client information has been held by the 'case' - and is not a representation of what is actually stored - even in the 'matched' client's record. It is always possible that even the multiple parametric searches performed during client inquiry fail to connect the dots properly in identifying the client.