Visit Tab

Once the caseworker completes a visit they are prompted by this tab to record some very basic information. The visit type is captured, along with the date of the visit. Each volunteer that was involved in the case is logged, including the amount of time spent. If the visit involved travel then mileage is entered (a mileage figure must be entered regardless - and if 2 or more people traveled together to the site then mileage should only be recorded for one).


Different types of visits are supported other than strictly home visits. If, for example, the visit is to an inmate in a local prison or if the conference conducts a visit by phone for some reason those visits are supported as well. Tracking all of this information is important to the operation for being able to estimate the amount of work volunteers are being asked to do and be able to better estimate the number of people that might be needed during peak times. Time recorded as spent should be a total - including travel time related to the visit.

Client Tab

Upon returning from the client visit the case is resumed at the client tab - where a final set of corrective actions have an opportunity to take place. The next typical step for the caseworker is to take the time to digitize the data collected during the client visit. The client tab is identical to the client profile tab during intake but at this point the caseworker has more accurate and up-to-date information from the visit and can make the appropriate corrections. The primary difference between them is the [Import Blanks from Current Client Record] button - which will auto-fill any blank fields with data from the permanent record associated with the linked historical version of this client.

Possible Client Profile Inquiry

If the caseworker is satisfied that the record they are working with is accurate, then no additional matching effort against the historical data is performed. One of the most critical elements of the casework process is to make sure the person that's being helped is correctly mapped to existing records in the system. The entire continuity of care argument hinges on the ability to follow the client from visit to visit as they work to escape their impoverished condition. During intake, the intake worker performed a matching exercise with the client profile to attempt to determine if there was a match to the client in the system. If the caseworker is happy with the selection then no action is required.
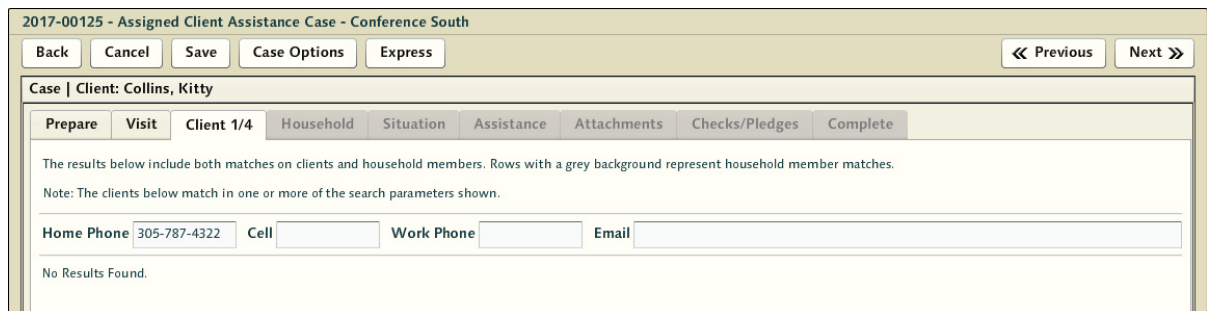

If the subject of the visit was incorrectly identified then the caseworker selects the [Change Client] button at the top. In this situation the caseworker will have to perform a client search of the system similar to that performed by intake in the inquiry phase. If the client is ultimately brand new then a [Create Client] button will appear to allow you to move forward with a completely new client record.

The second cause for a caseworker to perform the inquiry matching search is if the individual had no matching client record at the start of casework. Caseworkers will have collected and input more information and should be in a better position to decide whether a match is correct. If they are truly new there should be little doubt while reviewing the possible match results and the process can be concluded swiftly.

Update Client Record

Once [Next] is pressed the "Update Client Record' screen is generated. This screen allows the review of contrasting details between the original record and newly collected information. This last chance to review screen is here to give you a final opportunity to review the differences between the 'Latest Client Information' and the 'Old Client Record'.
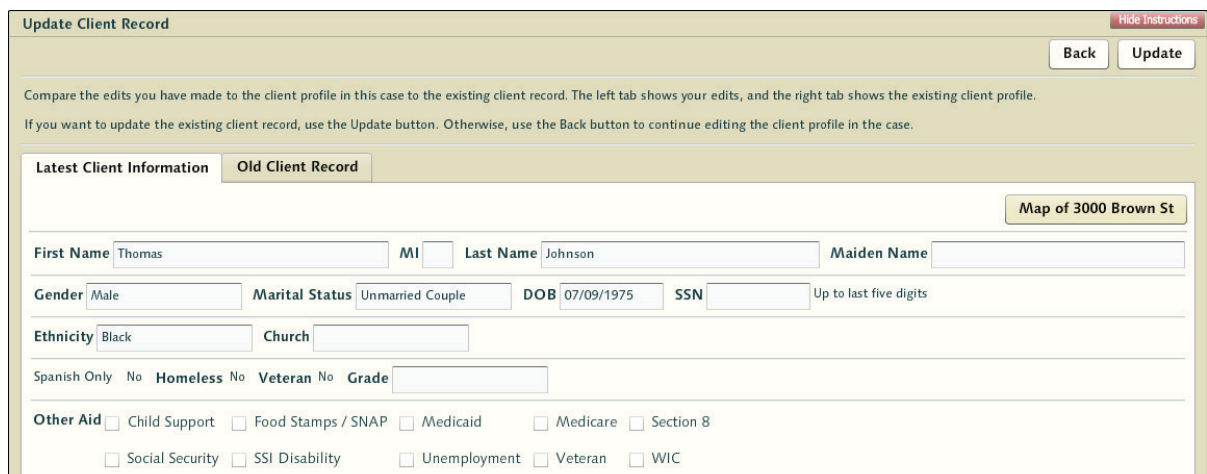
When satisfied that the information is accurate the caseworker presses the [Update] button. At that point the current details in this case profile will be harmonized with the details in the existing record. Changes in phone number or marital status etc will then become the new base client details for the client record. A warning dialog will prompt the user to be sure the changes they're going to make are accurate.

Note: a single instance of the last client data is still available for review in a version control state for quick reference and can be seen in the accordion 'client' section. If changes need to be reverted for some reason the older details can be re-entered.

Exception: Red Flag Client
At this point in the process there are some possible situations that will trigger the closing of the case before the recording of situation data. These are based on the events that transpired during the home visit.

Caseworkers returning from a home visit may make a determination that the client should be flagged as a result of experiences at the home. Choosing to Red Flag a client will create a warning that discourages assistance in the future. The decision can be made at any point by the caseworker, but this is the most likely point for a caseworker to come to this conclusion.

Selecting the [Red Flag Client] button prompts the caseworker with a large note field, allowing them to fully describe the situation and why they feel this individual should be Red-Flagged. Often these notes cross conferences or help completely different Vincentian workers understand the issues at hand quickly.

When finished recording the details, the caseworker has two options with regard to the Red-Flagged client. If the caseworker presses the [Close Without Assistance] button, this will close the case without assistance immediately - and place an impediment in the associated client record that should serve to prevent the client from receiving assistance in the future. Alternately, they can choose the [Red-Flag and Continue with Assistance] button. This will place the same stop on the client record in the future, but allow the caseworker to continue forward with the case in the current situation - or to account for aid that was rendered at the time of visitation. Often a situation is dire regardless of what might be an effort by the client to game the system and SVdP will end up helping the individual regardless.

The Caseworker can change their mind in the process by selecting cancel and returning to the point in the prior work-flow.

Exception: Express Assistance for Caseworkers

Selecting the [Express Assistance] button at the top of the screen is a way for a caseworker to skip the rest of the casework process and record a simple assistance event relative to the client. This is different from that recorded via the Express Assistance main menu item in that anything recorded using the work-flow started with this button will be applied to the client case record - and hence available historically as a client related touch point. Generally caseworkers should work through the process of recording the collected data - but there are times where a caseworker has very little to record and will not be seeking further assistance for the client through the system. Instead, they simply want to record that they left the client a bag of food.

2017-00130 - Assigned Client Assistance Case - Conference South							Hide Instructions

Back	Close Case	Save	Case Options	Red-Flag Client	Non-Express		« Previous	Complete

Case | Client: Johnson, Thomas

Prepare	Visit	Client	Household	Express Assistance

Household * 2   Number of Members in Household.

Please enter all assistance provided in the grid below: *

Resource*	Estimated Retail Value*

Reminder: As this is tied to the client record - it is possible that this is a new client in the system. If that is the scenario - and there still is no situational data to record for the individual - the caseworker still must go through the inquiry process to verify that this is a new client. The vision of this shortcut is primarily to speed the capture of simple in-kind assistance in what are otherwise less successful visits. Express assisting a client at this stage essentially means any more substantive assistance requests are being denied.

The household number box is pre-populated with a number calculated from the household details in the client record. Whereas the express assistance process does force the client harmonization process, it does not force the caseworker to then record any household related details. The number presented here can be adjusted as it might be that the caseworkers have enough anecdotal information on the household to make an adjustment here for the purpose of express assistance, but lack the details they might otherwise need to fully populate the household tab.

If in the process of recording express assistance the caseworker changes their mind - they simply need to select the [Non-Express] button at any point. This will leave this expedited process and return them to the regular casework flow.

Note: if a caseworker works their way through the process and reaches the Assistance tab, this sort of express assistance function will no longer be available. At that point the caseworker is already in a place in the work-flow where non-financial assistance can be recorded easily and express assistance no longer has any value.