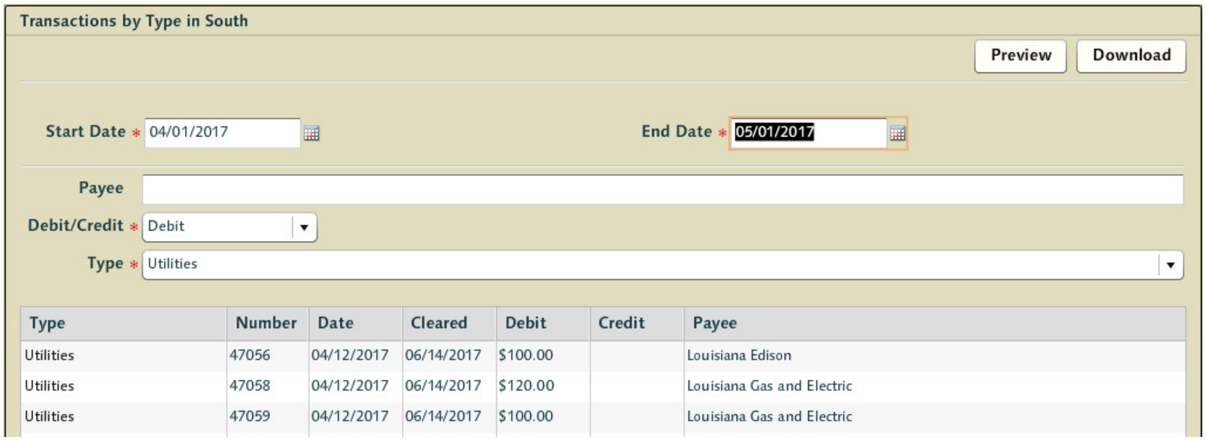
Transactions by Type

This report allows treasurers to isolate particular transaction types out of the system and generate a CSV of the output. It does require the transaction type parameter - but it provides a better method of producing a list of transactions than using the search for Check Requests in Case or simply trying to pick out particular types of transactions from the check register itself.



Input Parameters
Date Range | Payee | Debit/Credit | Transaction Type

Export Data Columns
Transaction Type | Check Number | Date | Cleared Status | Debit Amount | Credit Amount | Payee

Dashboards

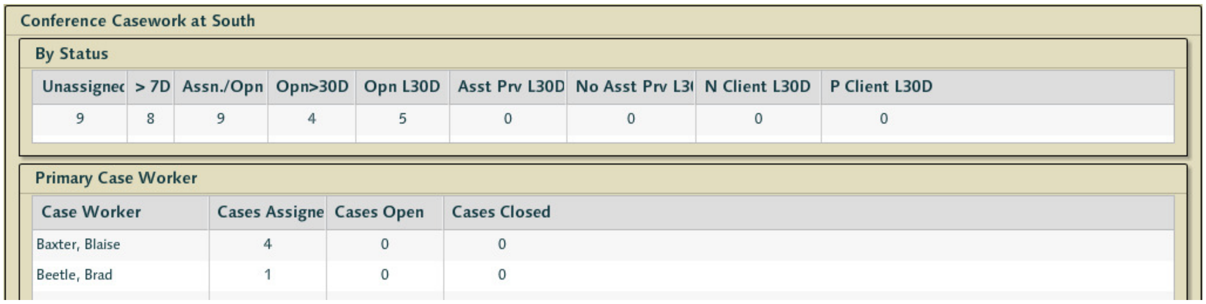
Dashboards are intended as informational views into the system. They are intended to provide leadership the ability to see the system operation from altitude. Data presented here is valuable as summary metrics that can be used by leadership for purposes that exist outside the system (discussing the health of the conferences, discussing the general 'business' of the diocese, etc). Leadership need not use these at all - they are merely tools that give a certain class of users an over-watch ability - so they can review how CMS is being used, possibly manage potential issues before they become problematic, and potentially improve their own relationship with the conferences through better coordination and understanding of needs.

We anticipate many of the drivers for these reports will be external to the conference operational mission - and to that end many of them will simply be foreign to the system altogether. However, giving conference and diocese leadership the ability to watch conference performance metrics can extend the power of CMS by giving leadership the tools to understand, appreciate what is going on at the conference level without having to dig down into a conference's financials and monthly reports.

Many of the details presented in these screens are culled in nightly cached queries or are taken from prepared reports. This means much of the time the data isn't live - so it's best if it's used primarily for 'general sense' evaluations.

Conference Casework

This is a dashboard that, at a glance, shows the efforts being worked on at this moment in the conference. The columns are abbreviated rather severely to get them on one screen - but once you're familiar with the meanings they should be obvious.



Conference Casework at South

By Status

Unassignec	> 7D	Assn./Opn	Opn>30D	Opn L30D	Asst Prv L30D	No Asst Prv L3(	N Client L30D	P Client L30D
9	8	9	4	5	0	0	0	0

Primary Case Worker

Case Worker	Cases Assigne	Cases Open	Cases Closed
Baxter, Blaise	4	0	0
Beetle, Brad	1	0	0

The top section of the dashboard shows aggregate activity metrics for all casework in the conference whereas the bottom section shows the breakout by primary caseworker.

Column Name	**Description**
Unassigned	Cases that have been through intake and are sitting in the casework worklist waiting for caseworkers to pick them up/be assigned to the cases. This will give you a sense of the pending work.
>7D	The number of cases that have been through intake and have been in the casework worklist for more than 7 days. This will alert the user if the conference case managers may be overwhelmed with cases.
Assn./Open	The number of cases in a conference that have been assigned and are 'open'. These are being worked on currently by caseworkers.
Opn>30D	This is a number showing the cases that have been open and have remained open for more than 30 days. If caseworkers never close their cases, then this number will become very large and it suggests the caseworkers might be having trouble using the system.
Opn L30D	The number of cases that were open in the last 30 days. The logic for this is cases that closed in the last 30 days + cases that are currently open.
Asst. Prv L30D	The number of cases that have been closed assistance provided in the last 30 days. If a case is still open, it will not count towards this number.
No Asst Prv L30D	Cases closed with no assistance provided over the last 30 days.
N Client L30D	Cases opened for new clients that have been entered into the system in the last 30 days.
P Client L30D	Cases opened for existing clients in the last 30 days.

Cases Assigned	Shows a sum of cases assigned to this caseworker as the primary in the last 30 days.
Cases Open	Shows a total of cases that have been open for the caseworker as the primary in the last 30 days.
Cases Closed	Shows a total of cases where the caseworker was assigned as the primary that were closed in the last 30 days.

District Casework

There is a similar District Casework Dashboard that shows the aggregate casework activity section for all conferences within the district that is available to District Leadership. The value for District leadership is to give them a sense of how busy their conferences are - and how well they're using the CMS system.

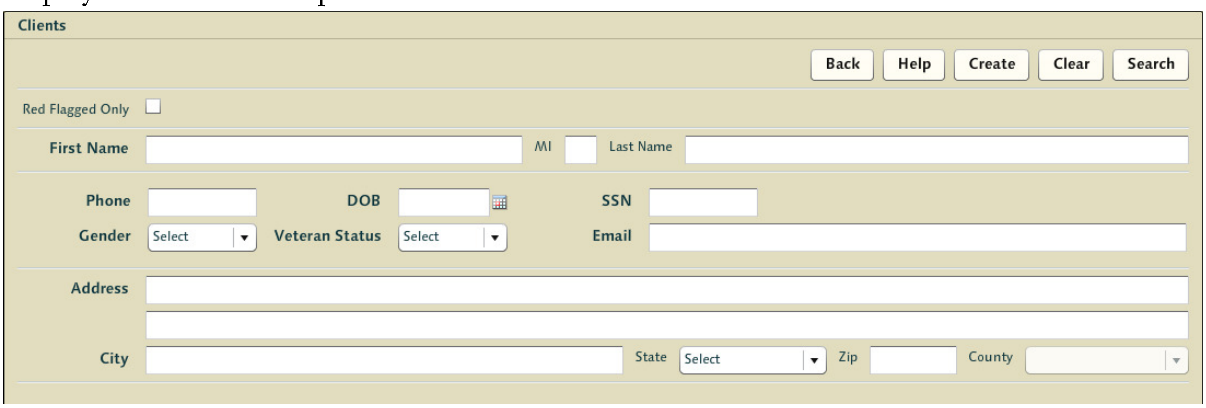
Search

Selecting the large [Search] button from the top of the screen brings up a screen with a number of different information retrieval operations. Many of these are used in the vetting process by intake and caseworkers outside the work flow path. There are times in any work flow design where the reality comes into conflict with the prescribed flow - hence Search has some very powerful tools that allow caseworkers and treasurers to find elements in the system that they might not find otherwise.

The primary purpose of these search functions is to find a single or a small number of possible matching records. If you're using search to generate lists then let us know and we'll try to assist you with a report that exports to CSV and gets you the data you need.

Client Search

Clients - a broad search of all client records, active or not, stored within the system - giving drill-down details into everything from a map to their residence, household information, employment details and past assistance.



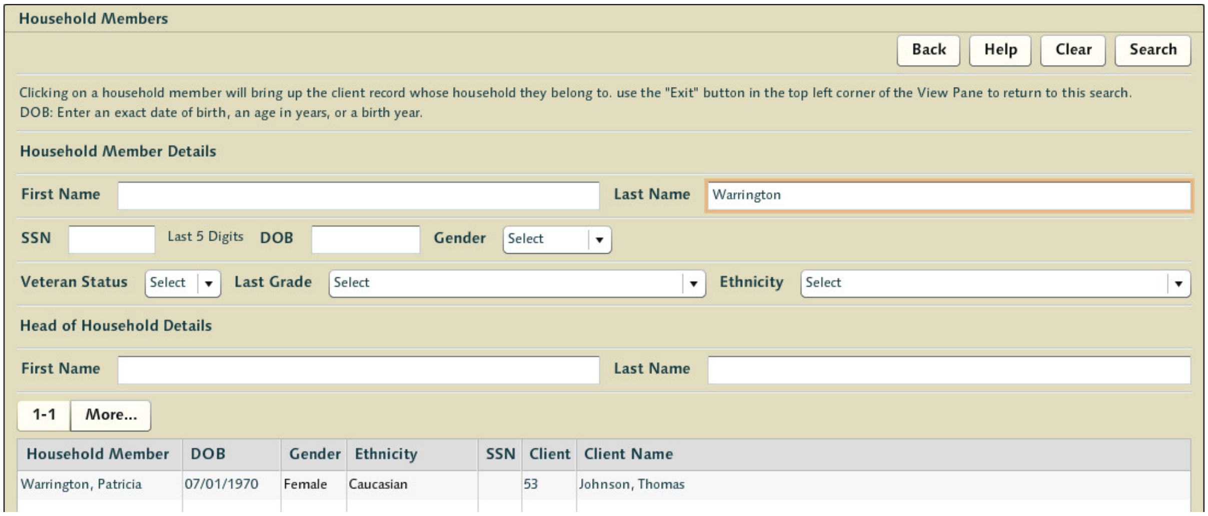
Client search will only search through actual client records. Prospective new clients, whether they have been assigned a case or not, but who have not had a visitation do not have actual client records. The caseworker must adjudge the client profile as captured in intake as an actual new person as far as the CMS system is concerned - so that person will NOT show up in this search. Even if the profile information has been captured in intake and there is data in the case related to the individual - the system has not been assured that the intake operator accurately assessed that this was truly a new individual - so in this rare scenario the client profile is in limbo pending record creation. If you are unsure the user may perform a case search which reviews all active cases - which will return the details of the case for the client that has not yet been visited and instantiated in the system.

Client search spans the entirety of the diocese - looking for people who've been put into the system no matter which conference might have helped them in the past. If there is an open case for the client in question, the case number will also be displayed.

Note: many of the fields in the search screens allow for the use of wildcards to refine the search mask. However, adding information to the mask is considered a "logical and" - a search for Sanchez may return several results, but if a phone number is added and none of the Sanchez client records match that number then the search will result in no matches.

Household Members Search

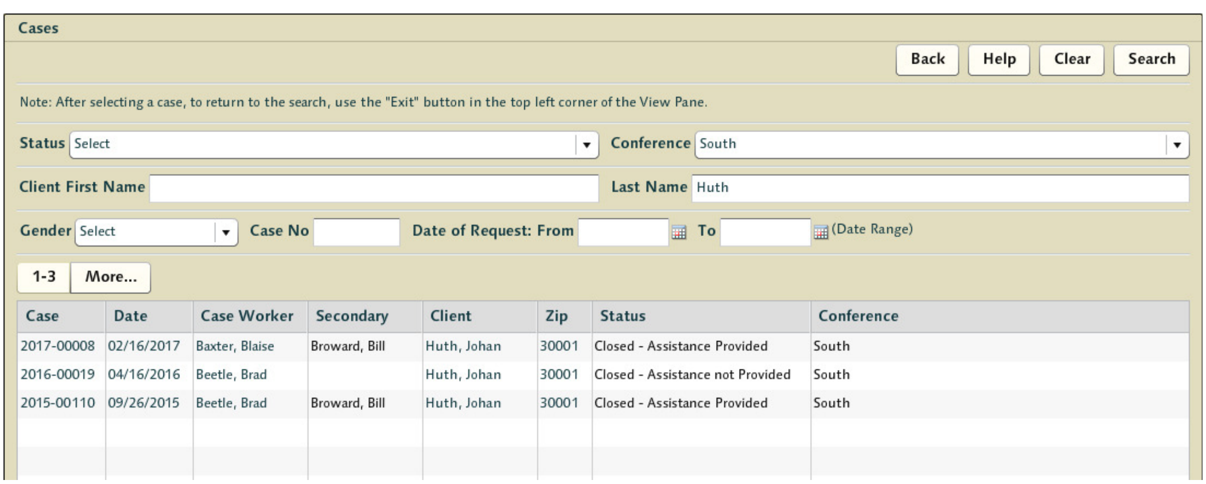
Household Members - similar to client search except it only examines client record household member information. Many times a household member will not share a name with the person asking for assistance, and household members do not have full client records - they're artifacts within another's details.



This search is intended to give a caseworker a tool to look into the data to try to find a relationship between a the client asking for assistance and a client that's already in the system. The parametric search in the intake process should hint at possible problems based on shared phone numbers or physical addresses. Using the Head of Household to perform this search is not uncommon as that is often the individual caseworkers are working with. Clicking on the result in the grid will display the household client record where this individual is a member.

Cases Search

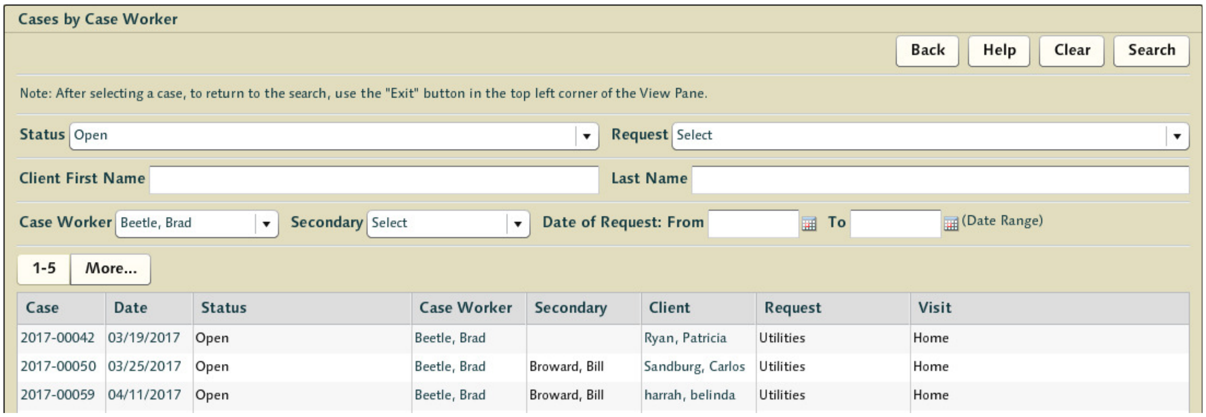
Cases - returning all cases related to the search criteria - active or not - and allowing access to explore the case in question. Searching the cases will show the operator if there are any active cases related to the entered information. If the operator is searching for John Smith cases with a status of "Closed-Assistance Provided", they will not see John Smith cases that are in any other state. Also - as this is searching Case data for profile information - this can be used to find unassigned profiles for those who've come to SVdP for assistance but have yet to be assessed by Caseworkers (for whatever reason).



If a client has contacted SVdP and has yet to hear from a caseworker, they might contact Intake again - or if they've got an open case with an assigned caseworker - there's no need to create a new case. The client information should be passed to the assigned caseworker - or additional information captured relative to the unassigned case.

Cases by Caseworker

This is a search to allow case managers or other conference officers to review the caseload of individual caseworkers. It was intended to help in decisions involving case assignments but can be used to review a caseworker's case load and contact with clients historically as well.

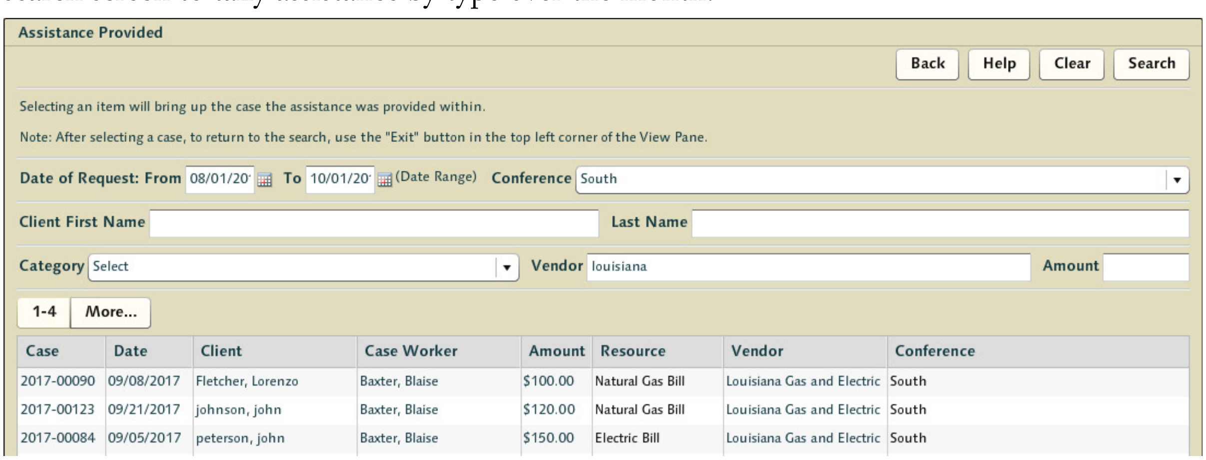


By supplying the client name one can find the caseworkers that historically worked with the client in question - allowing for communication, assignment based on familiarity, or other continuity of care efforts.

Assistance Provided

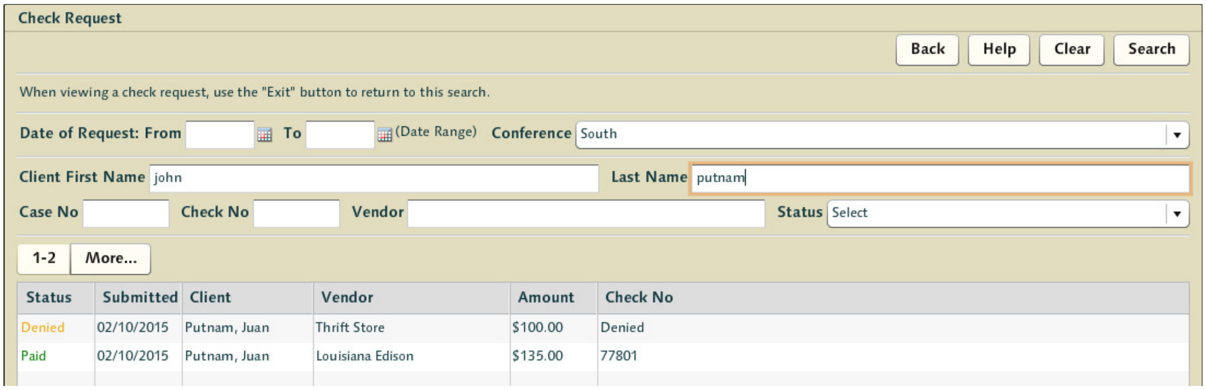
This search is used to find the cases where assistance was provided. The primary purpose of the search involves providing the name of the client in question. This will cause it to search client records and return any cases where assistance was provided for similarly named clients - helping determine eligibility at a glance and show whether a client might have received help from multiple conferences in a given time frame.

Another powerful approach is using vendor as the mask instead causing it to return cases where assistance was related to the vendor. Used this way it is a powerful tool for exploring the assistance the conference has provided - allowing conference officers to examine what outlays occurred over a span for auditing and metrics purposes. Many conferences use this search screen to tally assistance by type over the month.



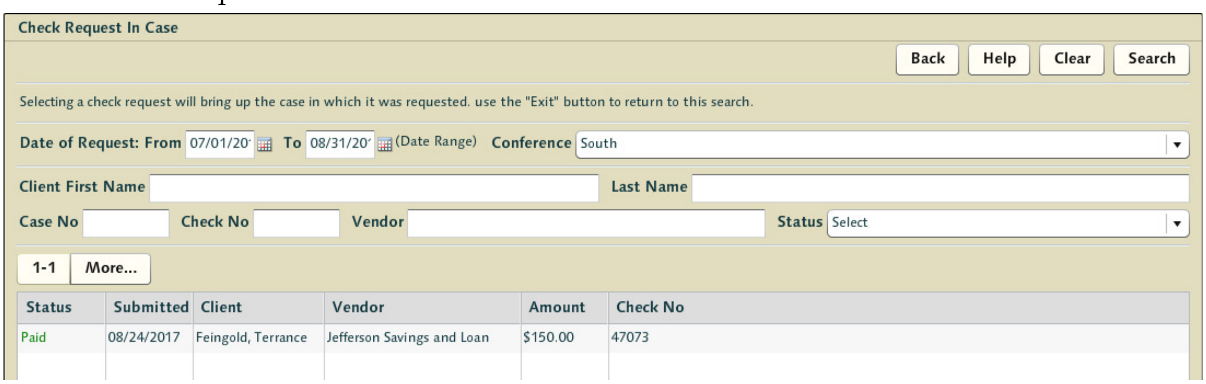
Check Requests

The search for check requests is one of the Treasury-only searches that is only available to the conference treasurers. The nature of this search is to provide a way for a treasurer to find a check request in the system (much as the search Check Requests in Cases) and then move to the request itself. This is the method by which a treasurer finds requests that have been processed and are outside the range of those displayed in the Processed tab in their Check Requests screen.



Check Requests in Case

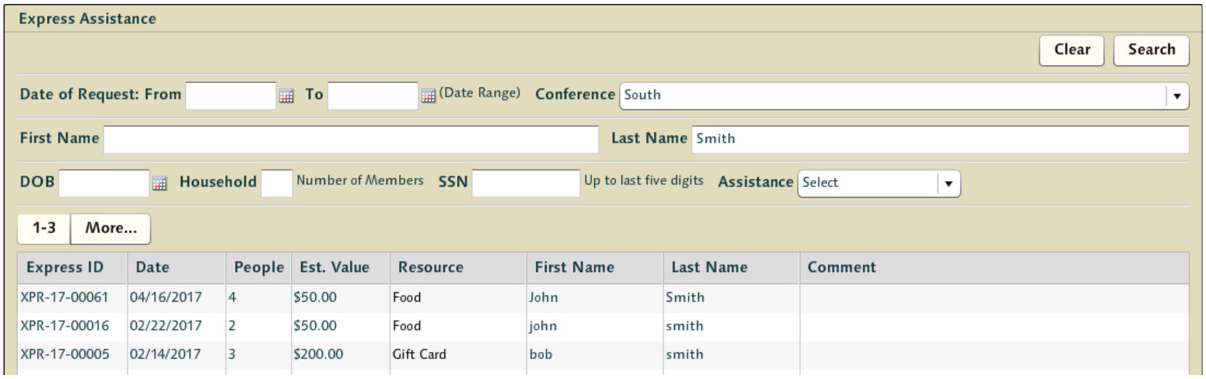
This search allows searching casework for check requests and, when the item is selected, taking the operator to the associated casework. This doesn't allow the requester to actually see the transaction itself - only the background related to a client requesting a certain type of assistance in the past.



This search defaults to the currently active conference for the user. However, caseworkers using this search screen can review all the casework in the diocese - allowing them to bring up a case for an individual that may have been worked across town - or one that might even be active in another conference. The caseworker performing the search will be unable to work the case that's been selected - they are unauthorized to close it or perform any actions. However, as with any time a CMS user brings up a live case, they may use the messaging system to send a message to the Caseworker of record to inform them of something they feel might be relevant to the case.

Express Assistance

This query allows searching for particular types of express assistance that has been provided. It only shows express assistance exclusively and does not show all inkind assistance that may have been rendered through casework. Ideally it is intended to give you a chance to look for unique express assistance events and not generate large lists.



Express Assistance

Clear Search

Date of Request: From To (Date Range) Conference South

First Name Last Name Smith

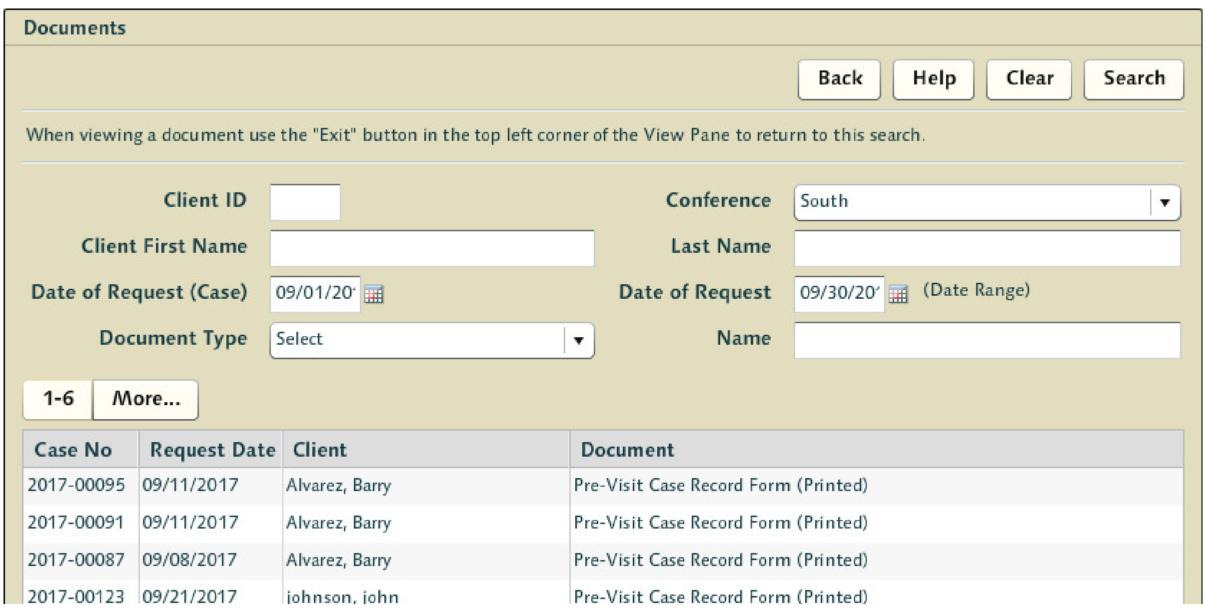
DOB Household Number of Members SSN Up to last five digits Assistance Select

1-3 More...

Express ID	Date	People	Est. Value	Resource	First Name	Last Name	Comment
XPR-17-00061	04/16/2017	4	$50.00	Food	John	Smith	
XPR-17-00016	02/22/2017	2	$50.00	Food	john	smith	
XPR-17-00005	02/14/2017	3	$200.00	Gift Card	bob	smith	

Documents

This allows the case manager or caseworker to pull up any document prepared for casework by the system. Currently the only supported document type is the printed case record form.



Documents

Back Help Clear Search

When viewing a document use the "Exit" button in the top left corner of the View Pane to return to this search.

Client ID Conference South

Client First Name Last Name

Date of Request (Case) 09/01/20 Date of Request 09/30/20 (Date Range)

Document Type Select Name

1-6 More...

Case No	Request Date	Client	Document
2017-00095	09/11/2017	Alvarez, Barry	Pre-Visit Case Record Form (Printed)
2017-00091	09/11/2017	Alvarez, Barry	Pre-Visit Case Record Form (Printed)
2017-00087	09/08/2017	Alvarez, Barry	Pre-Visit Case Record Form (Printed)
2017-00123	09/21/2017	johnson, john	Pre-Visit Case Record Form (Printed)