



# Red Flag

April 2022

# 2021-2022 Advanced Training Topics



## Completed with Videos & Handouts

- ✓ Holiday Programs
- ✓ Client Merge
- ✓ Annual Report
- ✓ Beginners Case Intake
- ✓ Pledges
- ✓ Beginners Treasurer
- ✓ Vendor Maintenance & Conf. Reports
- ✓ Gift Cards and Vouchers
- ✓ Client History; Case Attachments; Uploading Documentation
- ✓ Express Assistance
- ✓ **Red Flag**

## Upcoming

- Beginners Caseworker – May 10<sup>th</sup>
- Support Community Website 2.0 (TBD)
- Ask The Expert Q&A – Case Intake (TBD)
- Ask The Expert Q&A – Casework (TBD)
- Ask The Expert Q&A – Treasury (TBD)
- Others ??? – We Need Your Input**

# Red Flag Guidelines



1. Conferences share clients....”Red Flag in one is Red Flag in all”
2. Avoid using red flag for conference specific guideline limits
3. Should be interpreted as “caution/alert”
4. Not an automatic disqualifier for assistance
5. The punishment needs to fit the crime
6. Not a life sentence

# Red Flag Roles and Allowed Functions



## Roles

- Intake
- Caseworker
- Records Manager

## Allowed Functions

- ✓ Red Flag Existing Clients
- ✓ Withdraw Red Flag or Withdraw Petition for Removal
- ✓ Petition for Removal of a Red Flag
- ✓ Add and Review Client Record Notes – Existing Clients
- ✓ View Red Flag History
  
- ✓ Same as Intake Person Role
- ✓ Red Flag New Clients
- ✓ Print Red Flag Clients Report
  
- ✓ Review Red Flag Audit Report
- ✓ Keep and Remove Red Flags
- ✓ Delete Previous Red Flags
- ✓ Change Client's Status

# Red Flag “Petition” Process



## Intake and Caseworker:

Petition the Records Manager for a client to be Red Flagged (although, the client is Red Flagged immediately) or for a Red Flag to be removed.

## Records Manager:

Reviews the Petition and decides either to keep or remove the Red Flag. If no action is taken, the client’s Red Flag status remains unchanged.

# Red Flag Demo

- Red Flagged Client Record
- Red Flag Clients
- Petitioning for Removal
- Withdrawing Red Flag and Withdraw Petition for Removal
- Client Record Notes
- Red Flag Audit Report
- Keep and Remove Red Flags
- Red Flag History
- Change Status
- Red Flag Clients Report



# Red Flag

## Process Improvement Recommendations



- ✓ Assign Records Manager role
- ✓ Reinforce that red flag should be interpreted as a “caution/alert”
- ✓ Reserve red flagging clients for serious offenses
- ✓ Consider using client record notes for guideline limits violations
- ✓ Review red flagged clients and determine if red flag should be removed
- ✓ Clean-up the Red Flag Audit Report