

Preparing a Case

Once the exceptions are passed the caseworker has an opportunity to prepare the details of the request and review any eligibility data that's associated with the client if the client has a history in the system. With diligent intake workers collecting as much information as possible this can save caseworkers a tremendous amount of time - and if there is a distribution process that involves unassigned case examination - it can be critical in making sure the right cases end up in the hands of the right caseworkers.



Note: The appearance of these tabs is optional on a Diocese configuration basis. The following is the list of the possible tabs in the order presented.

Past Assistance

One of the most important questions to determine early is that of the history of Past Assistance. The Angular CMS system tracks a household's assistance across the entirety of the diocese from the very first time they get help. All along this case preparation process, at the bottom of the tabbed workflow is a 'Past Assistance' accordion. Clicking this will reveal any past assistance and Vincentian Program History related to the client. Clicking the assistance elements in the grid will bring up the related cases for review.

Conference	Status	Check?	Case	Date	Amount	Category	Vendor
South	Closed - Assistance not Provided		2017-00122	09/19/2017			
South	Closed - Assistance Provided	Paid	2017-00082	08/28/2017	\$400.00	Housing/Storage	Stephens Properties

The system will display instances of assistance and those where a client contacted SVdP and the request was denied. This is an invaluable tool for determining whether the requester is a frequent visitor. Clicking the Program History tab will show which Vincentian Programs the client might have been referred to and, depending on the program, what sort of assistance they might have received. Clicking the 'Case' accordion at the top will lower the Past Assistance screen - switching back to the case process.

Household

This tab displays the household data for the client record if this is an existing client, or an empty household page if this is a new one. Details are recorded here by the intake workers and new data will be reviewed by the caseworker after the home visit. Household members are added one by one, with each represented by a single line with the required fields being denoted with a star. To delete an entry simply tick the 'Del' checkbox adjacent to the row in question and press the [Save] button at the top (or move forward or backward in the process using [Next] or [Previous]).

Intake operators should supply either date of birth or age but not both as age is calculated if birthday is provided. A yellow row indicates that the family member was added during this intake process - meaning it has not been validated by a caseworker as of yet.



Note: While most of the information managed through a case exists within the case, the household composition exists only within the client record and is updated directly there. If there had been existing household data for this client, it would have appeared in the grid if a matching record is selected. Changing and deleting this data should be performed with care.

Request Details

This tab is where the assistance request details are recorded. There are a number of options that suggest the types of assistance primarily granted: Rent, Utilities, Food, Other. However, this is intake - these details are mostly valuable as descriptive of the situation to the caseworker. Nothing about this request is a constraint upon the caseworkers when they're actually working the case.

Intake may also make referrals into any applicable Vincentian Programs at this point in the process as well. In the 3.0.000 release the only Vincentian Program option is Holiday Program tracking - but as other programs are added to the system there will be scenarios where certain types of intake-oriented program referrals are more common.

Other Agencies

Details of any other efforts by the client to receive aid through a number of other organizations both public and private. The details collected here are an effort to determine what other aid sources the client has made an effort to obtain. It gives the caseworker a sense of what other options might be available as recommendations - or what sort of other efforts have been made on the client's behalf.

Case Intake

Back Cancel Overview Save Red-Flag Client Refer << Previous Next >>

Conference South Case No. 2017-00130 Client Johnson, Thomas

Case

Client Profile Client Identification Open Case Review Conference Household Request Details Other Agencies Eligibility Submitted

Agencies applied to within the last 12 months. (Please give info on all that apply)

Del	Name	Amount	Date	Purpose
<input type="checkbox"/>	Caritas of New Orleans	\$250.00	02/02/2017	Helped with utilities
<input type="checkbox"/>				

This data is passed forward to the caseworker where it should be explored more thoroughly. The more clear the picture with regards to the entirety of assistance in a neighbor's life the better the quality of care Vincentians will be able to deliver.

Eligibility

The Eligibility tab is a simple review of the detailed assistance request and any past assistance efforts on behalf of the client.

Scheduling Notes

The Scheduling Note field - reached through an accordion once intake has progressed to the request details tab, is a free-form text field that allows intake to pass along their impressions or any other valuable information to the conference caseworkers. It is up to intake as to what might be considered important - whether that is details about the need itself, perhaps an immediacy issue, or perhaps simply notes about when the person would be available to be contacted to arrange a home visit. It's not intended to be searchable or long-term valuable information about the requester.

Case Intake Hide Instructions

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Conference South Case No. 2017-00130 Client Johnson, Thomas

Case

Case Instructions

You can provide any additional instructions and details pertaining to this case and this client below.

Was really upset at having to call us again. Seems genuinely at their wits end. Also, said they might not be able to meet with anyone this weekend as they have both taken extra shifts to try to cover their expenses - and hope we can meet with them the first of next week.

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Past Assistance