

# CMS 4.1 Release Notes Supplement

## I. Assistance Simplification:

### 1. Buttons and Tabs:

- a. Reduced top line persistent buttons from 9 to 6
- b. Reduced the total number of fixed case flow tabs from 9 to 6
- c. Changed some tabs and buttons labels to be more intuitive
- d. Removed Visits, Checks/Pledge, Complete, and Attachments tabs
- e. Renamed the Prepare tab to “Pre Visit”
  - i. Moved visit type & visit date from Visit tab to Pre Visit tab
- f. Added “Close Case” tab as the last step in the visit process
  - i. Move hours and miles from Visit tab to Close Case tab
- g. Renamed Complete tab to Follow-Up
- h. Renamed Complete button to Close Case
- i. Consolidated the “Cancel” button (for new clients) and “Cancel Case” button (for existing clients) into 1 “Cancel” button

### 2. Assistance, Attachments, and Quick Close:

- a. Changed the requirement of when a case can be closed. **From:** after the Treasurer has approved the check request; **To:** any time after all assistance has been entered
- b. Consolidated the multiple assistance entry/verification screens from 2-3 to a “single” entry screen for ALL 4 assistance types (check request, pledge request, gift card/vouchers and in Kind)
- c. Reduced the check & pledge withdrawal steps from 2 to 1 (delete)
- d. Increased the number of attachment uploads from 1 to 3; all on a single screen and allowed for duplicate document names
- e. Added a “Quick Close” menu to enable the caseworker to close their case immediately as part of their current work stream. The “Quick Close” menu offers options to enter attachments (if attachment’ setting has been enabled) and to enter, or bypass, follow-up information (follow-up date is no longer required)

## **II. Auto Close (New Feature):**

1. A Case Manager's role is required to access this feature
2. The screen (which mirrors Search | Cases by Caseworker) includes a check box, to mark the case(s) as closed, and the number of days the case has been opened
3. An email is sent to the caseworker(s) that the case was closed and includes the close date and the person who closed it
4. A generated message "Auto Close" is entered in follow up
5. Minutes and Miles are generated from the Diocesan level default values

### **IMPORTANT – PLEASE READ!**

Once CMS 4.1 is implemented; ALL open cases, created prior to the implementation of CMS 4.1, will use the current CMS 4.0 case flow. Only new cases, after CMS 4.1 is implemented, will use the new Conference Visit flow.