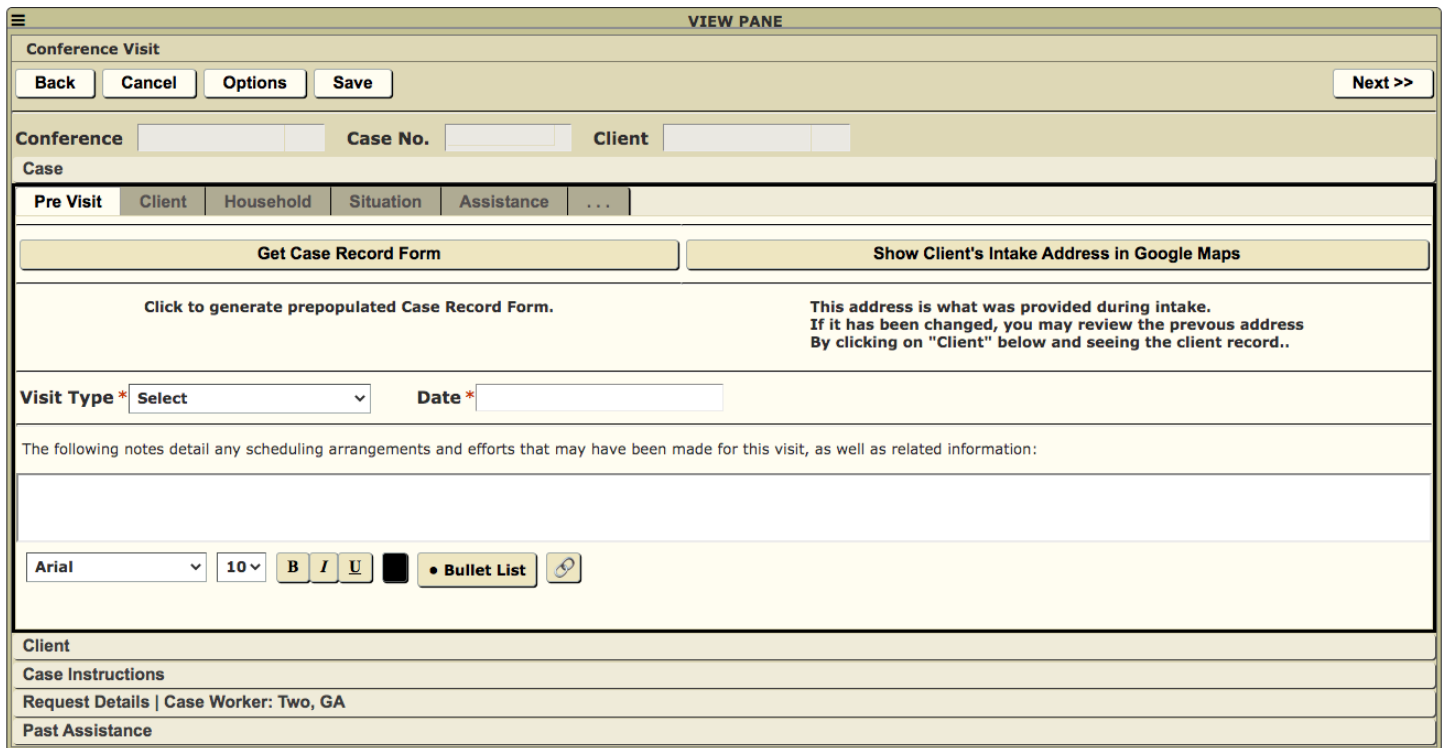# CMS Release Notes 4.1.000

agular

Feature change

Enhancement:　　Visit flow and case closure streamlined

- |Pre Visit| tab　replaces　|Prepare| tab
- |Visit|　　　tab　removed
- Caseworkers can direct case closure immediately after |Assistance| tab.
- Caseworkers can elect case closure tasks: |Attachments| and |Follow-Up| are now optional.
- Caseworkers now enter their minutes and miles within the last tab, |Close Case|.

VISIT FLOW > PRE VISIT

VISIT FLOW > .. > CLOSE CASE

☰	VIEW PANE *

Conference Visit

Back	Cancel	Options	Save		<< Previous	Close Case

Conference		Case No.		Client	

Case

Pre Visit	Client	Household	Situation	Assistance	Close Case

Complete the following information after completing the visit.

Refresh	Use the Refresh button if new volunteer assignments have recently been made, to have these appear below.

Member	Minutes *	Miles *
Two, GA		

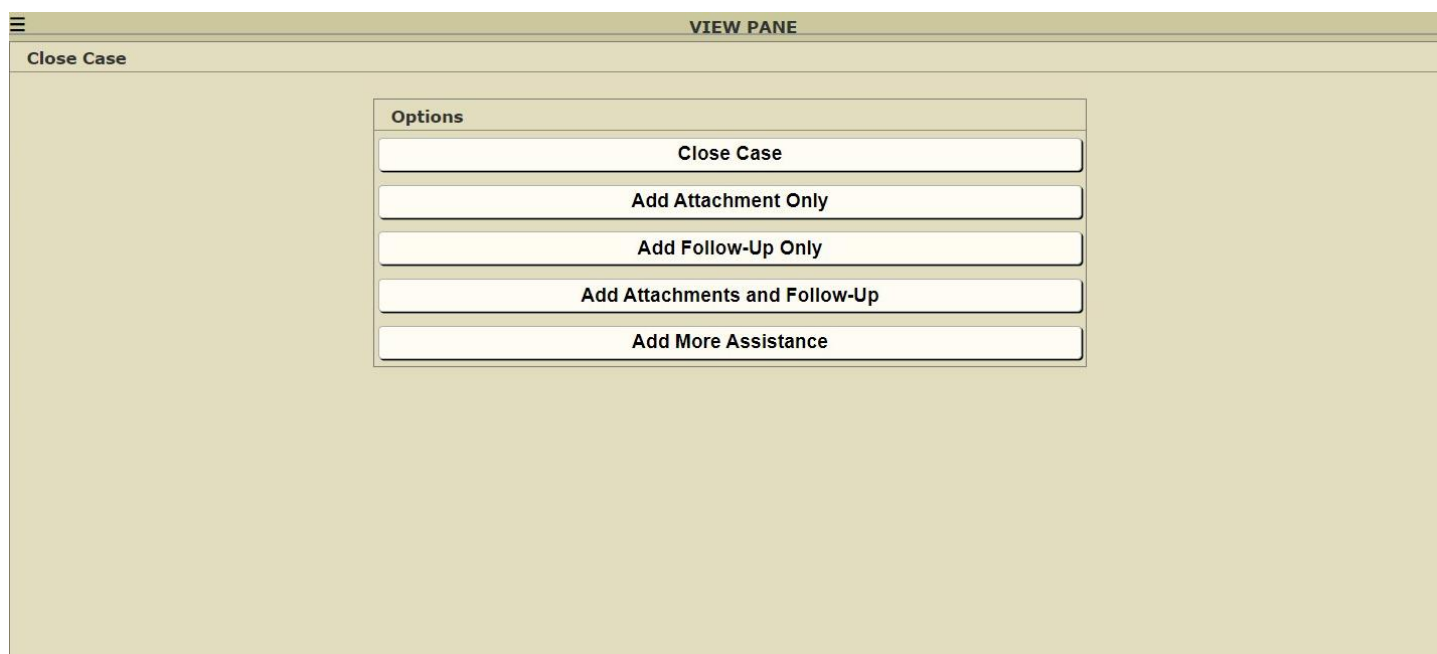**Request Details | Case Worker: Two, GA**

Past Assistance

Client Record Notes

| Enhancement: | Case Close options immediately following |Assistance| tab |

After advancing from the |Assistance| tab using the [Next >>] button, these options present:

- ○ [Close Case]
- ○ [Add Attachment Only]
- ○ [Add Follow-Up Only]
- ○ [Add Attachments and Follow-Up]
- ○ [Add More Assistance]

CLOSE CASE OPTIONS

Notes:

- After selecting a close case tab option from the list, any return to the |Assistance| tab and subsequent submission of assistance items will cause the full tab set (3) to appear during the remaining close case tab flow.

- You may skip any post |Assistance| tab except the last one: |Close Case|.

- Initial and consecutive use of the [Add More Assistance] button will return the user to the |Assistance| tab until a tab option is selected.

Enhancement: Single Forms for the |Assistance| choice buttons

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Multi-form data entry for all four |Assistance| items are now accomplished with single forms:

- ○ [Add Check Request]
- ○ [Add Pledge Request]
- ○ [Add Gift Card/Voucher]
- ○ [Add In Kind]

Enhancement: Conference Case Manager can close open cases

- ● Case Manager > Options > Auto Close
- ● A chain of custody Email is sent to the Caseworker summarizing the close case action taken on their behalf by the Case Manager

AUTO CLOSE
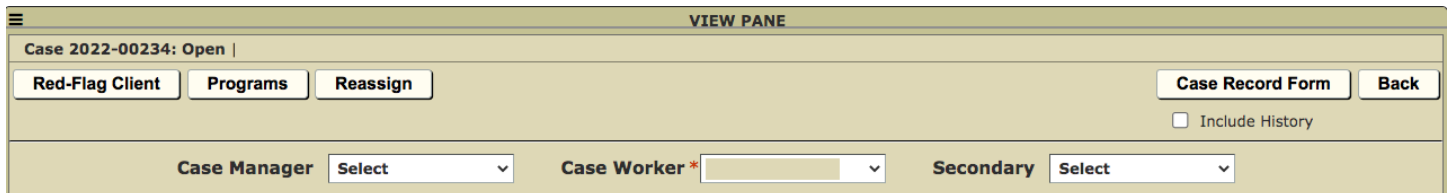
	Days Open	Case	Date	Case Worker	Secondary	Client	Request	Visit
☑	361	2021-00203	11/15/2021	One, GA	One, GA		Food/Groceries	Other in Person
☑	262	FBP-22-00012	02/22/2022	One, GA				
☑	213	FBP-22-00141	04/12/2022	One, GA				
☑	213	FBP-22-00143	04/12/2022	One, GA				
☑	156	2022-00160	06/08/2022	One, GA			Food/Groceries	Hospital
☑	115	FBP-22-00162	07/19/2022	One, GA				
☑	115	FBP-22-00163	07/19/2022	One, GA				
☑	108	2022-00168	07/26/2022	One, GA			Food/Groceries	Home
☐	30	2022-00185	10/12/2022	Fig, Trans			Rent/Mortgage/Shelter	Telephone
☐	19	2022-00200	10/23/2022	Two, GA			Utilities	Home
☐	19	2022-00201	10/23/2022	Two, GA			Utilities	Home
☐	18	2022-00208	10/24/2022	Two, GA			Food/Groceries	Home

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Enhancement:	[Options] button consolidation

- [Case Options] changed to [Options]
- The following buttons have been moved to [Options]:
    - [Red-Flag Client]
    - [Programs] *
    - [Reassign]

* Formerly [Vincentian Programs]

[OPTIONS]

≡	VIEW PANE	
Case 2022-00234: Open |		
Red-Flag Client	Programs	Reassign	Case Record Form	Back
		☐ Include History
Case Manager Select ⌄	**Case Worker** * [ ] ⌄	**Secondary** Select ⌄