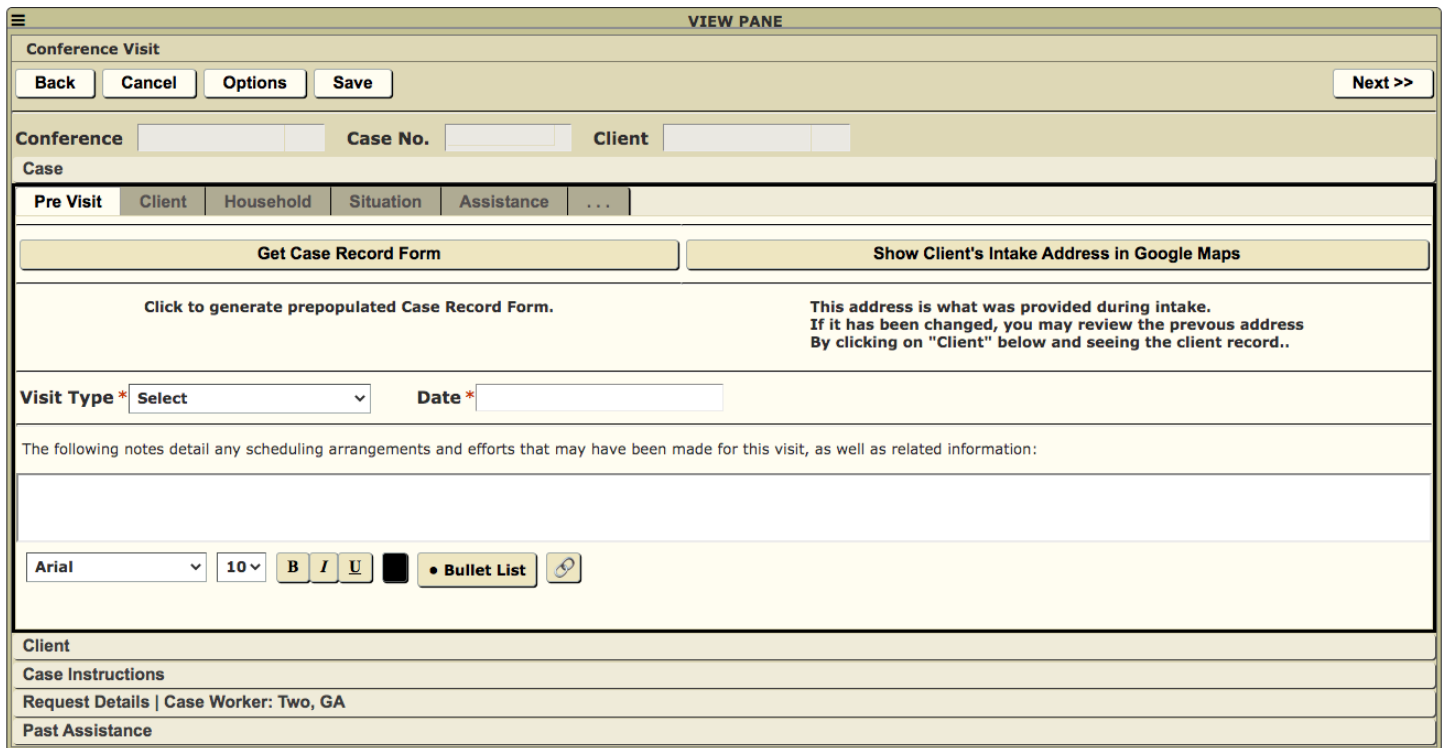


## Feature change

*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



The screenshot shows the 'Conference Visit' form within a 'VIEW PANE'. At the top, there are navigation buttons: 'Back', 'Cancel', 'Options', 'Save', and 'Next >>'. Below these are input fields for 'Conference', 'Case No.', and 'Client'. A 'Case' tab bar is visible with 'Pre Visit' selected. Two main buttons are present: 'Get Case Record Form' and 'Show Client's Intake Address in Google Maps'. Below these buttons, there are instructions: 'Click to generate prepopulated Case Record Form.' and 'This address is what was provided during intake. If it has been changed, you may review the previous address By clicking on "Client" below and seeing the client record..'. There are also fields for 'Visit Type \*' (a dropdown menu) and 'Date \*' (a text input). A text area follows with the instruction: 'The following notes detail any scheduling arrangements and efforts that may have been made for this visit, as well as related information:'. Below the text area is a rich text editor toolbar with options for font (Arial), size (10), bold (B), italic (I), underline (U), a color picker, and a 'Bullet List' button. At the bottom of the form, there are sections for 'Client', 'Case Instructions', 'Request Details | Case Worker: Two, GA', and 'Past Assistance'.

## 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

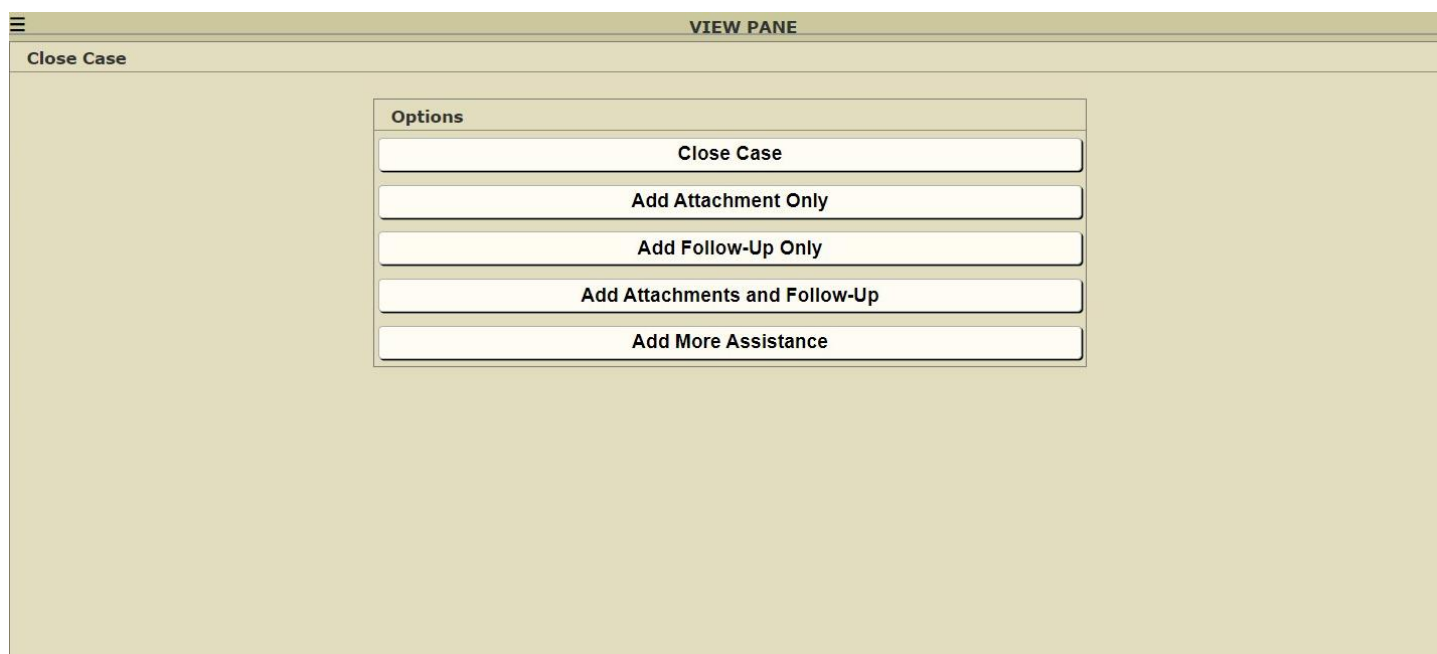
Client Record Notes

**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



The screenshot shows a web interface with a header bar containing a hamburger menu icon and the text 'VIEW PANE'. Below the header, the page title is 'Close Case'. The main content area features a vertical list of five options, each in a white button with a thin border and centered text:

- Options
- Close Case
- Add Attachment Only
- Add Follow-Up Only
- Add Attachments and Follow-Up
- Add More Assistance

### 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


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



Home My Profile Search Documents User Guide Support Logout

VIEW PANE

Auto Close Test

Clear Search Close Selected Cases

Request Select

Client First Name 
Last Name

Case Worker Select Secondary Select
Date of Request: From 
To  (Date Range)

Check each case you want to close, then click "Close Selected Cases".

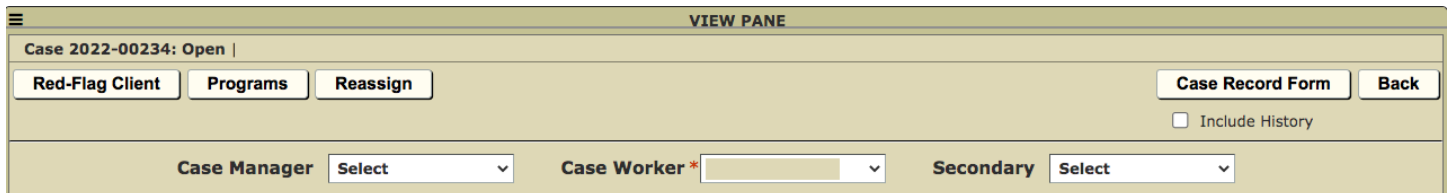
	Days Open	Case	Date	Case Worker	Secondary	Client	Request	Visit
<input checked="" type="checkbox"/>	361	2021-00203	11/15/2021	One, GA	One, GA		Food/Groceries	Other in Person
<input checked="" type="checkbox"/>	262	FBP-22-00012	02/22/2022	One, GA				
<input checked="" type="checkbox"/>	213	FBP-22-00141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

*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  Case Worker\*  Secondary