AES
Adaptive Enterprise Solutions

...unlocking the dawn of better results for your organization

CSBG USER GUIDE

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Overview of CSBG Services Section

The pages in the CSBG section are used to enroll a Client into a Program and record the services delivered to them and their Milestone accomplishments. The Program Services page serves as a Client's permanent record – all Activities will be displayed on this page, although they may be recorded on other pages.

Required items are shaded a light blue; these items must be complete in order to add a Client to the system.

Glossary

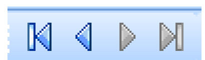
Domain is the physical instance of the software used for one collaborative; there may be a Production domain and a Training domain
Application is the designation given to the collection of pages in the system used for a specific type of program, i.e. HMIS, Head Start, CSBG, or Weatherization; only one Application can be used at a time
Organization is an Agency set up to use the system
Program is a program within the Organization; it will include one or more Program Components, Target Goals and
Program Component is a sub level of a Program designated to a narrowly focused process provided by Agency staff members to their Clients; it includes unique Activities and Milestones
Activities are Staff performed services to assist Clients (case management, assessment, home visit); these are the Activities that will be recorded in the system and reported
Milestones are Interim Client results, those steps along the way to achieving the target outcome
Household is the grouping of Clients who live at the same address
Family is the grouping of Clients in a Household who are related by blood, marriage or adoption

The Basic Process for Program Entry and Service Delivery

1 Search for Client
2 Enter Client into Program
3 Answer Program Entry Questions
4 Generate Program Component (this is sometimes done automatically)
5 Record Services
   a Case Management on Case Notes page
   b Assessments on Profile page
   c Sessions on Group-Sessions page
   d All other Services on Program Services page or as extra services on Case Notes page
6 Record Milestone Achievements
7 Exit Client from Program

Common Elements to CSBG pages

Search for Client on all Services pages

1 If JUMP TO PROGRAM ENTRY button was used, Client Name will show in Status Bar at bottom of page
  a The Jump button is available on most pages in Central Intake section
2 If page was clicked in Navigation Bar, Client may not be active; there are several ways to search for a Client
  a In Search fields at top of page, enter any combination of criteria –Client First/Last Name, Identifier
  b Click SEARCH button
  c If there is more than one match, all possibilities will appear in Customer dropdown OR use blue arrows in Program Toolbar to scroll through available Clients; arrow pointing to a line go directly to the first or last household member 
3 Search for Client(s) on Listing page (*see instructions for that page*)
  a All matches will appear in Customer dropdown OR use blue arrows to scroll through available Clients
4 Search for other Household members
  a Click SHRINK LIST TO CURRENT HOUSEHOLD button 
  b Use dropdown or arrows to see matches
5 Search for your own Clients
  a Click SHRINK LIST TO CURRENT CASE WORKER button 
  b Use dropdown or arrows to see matches
6 Search for Clients in your Group
  a Click SHRINK LIST TO CURRENT GROUP button 
  b Use dropdown or arrows to see matches

> ➤ *Always make sure correct Client is active on service pages! Client name shows in Status Bar at bottom of page*
>
> ➤ *If JUMP TO PROGRAM ENTRY button (available on many Central Intake pages) was used, the Client will show in the Status Bar at bottom of page*
>
> ➤ *If Entry page is clicked in Navigation Bar, search for the Client first using the search fields in the blue area at the top of the page*
>
> ➤ *If a search is conducted on the Agency Client Listing page, all matches will be available in the Customer dropdown*

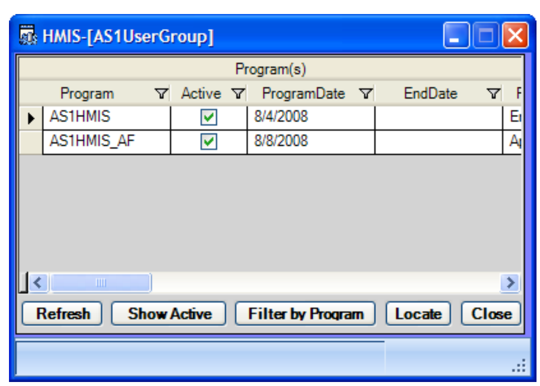
Select Program

1 Program will be displayed in top blue area
  a To select different Program, click the VIEW PROGRAMS CLIENT IS ENROLLED IN button 
  b OR each Client and current Programs will be available in Customer dropdown
  c If Program is not available, go to Program Entry page to enter Client into a Program

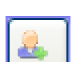
Change selected Program or View all Programs Client is enrolled in

The popup window displays all Programs a Client is or has been entered in and the start and end dates of each one.

1 Click VIEW PROGRAMS CLIENT IS ENROLLED IN 
2 To change to a different Program:
  a Select that Program in the PROGRAM(S) GRID
  b Click the LOCATE button
  c Click the CLOSE button



Return to Household page

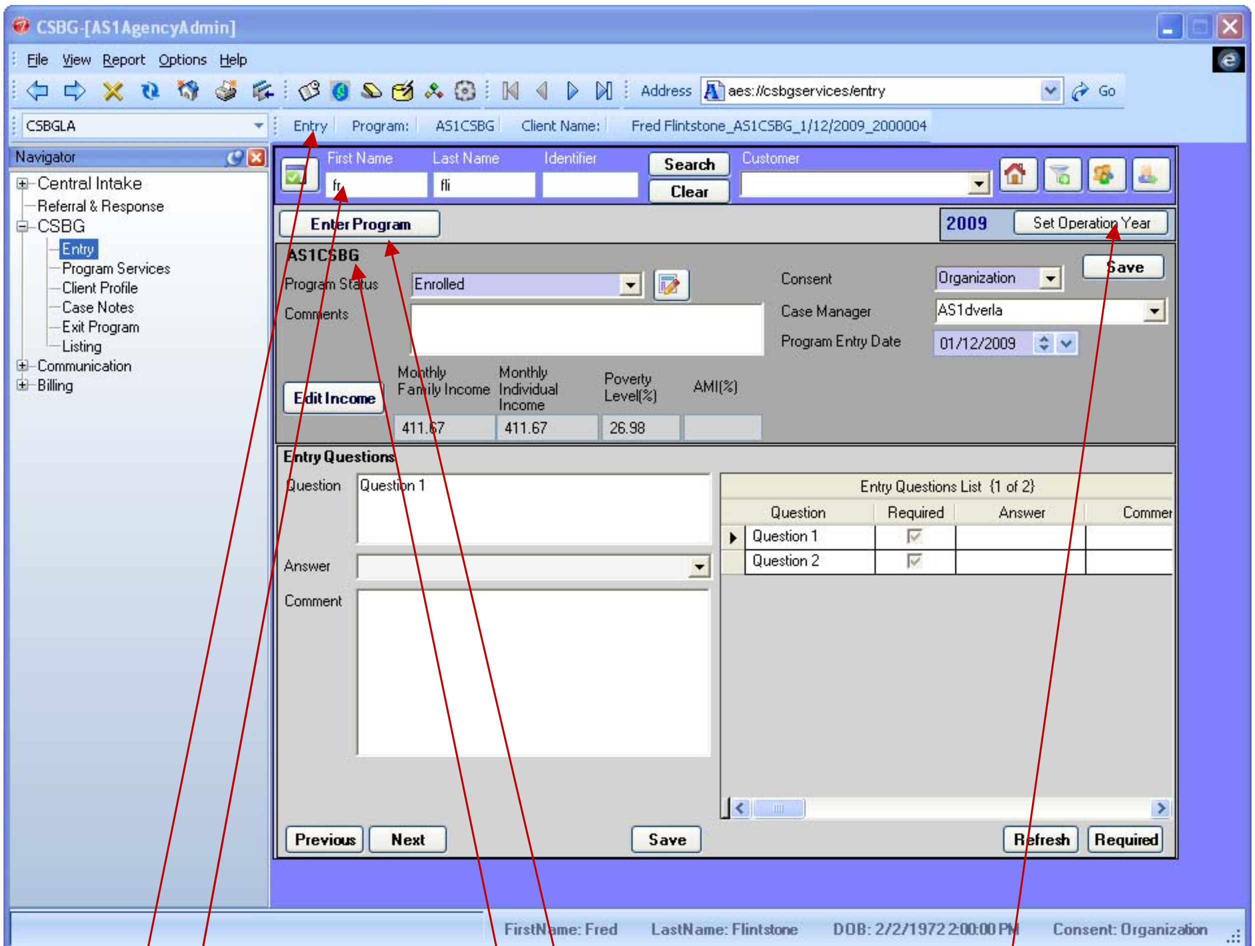
1 Click JUMP TO DEMOGRAPHICS button 

Central Intake Household page will open with this Client active

Entry Page

Data entered on the Program Entry page is for enrolling clients into a particular program and assessing the client's current situation. Questions may appear in the bottom section after Entry.

Note all required fields are shaded light blue.

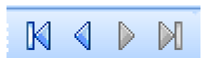


Navigating the Program Entry Page

- The top light blue line shows the Page, Program currently displayed and active Client
- Current Client is always displayed in the Status Bar at bottom of page
- The fields in the blue section at the top of the page are for searching only
- Change the Operation Year to see a previous year's data with the SET OPERATION YEAR button
- Start the Entry process with the Enter Program button
- When a Client is entered into the Program, the Program name shows in bold here
- Program Entry details are displayed in top section
- Income information is displayed in the middle of the page
- Program Entry Questions are displayed in bottom section

Make sure correct Client is active

1 If JUMP TO PROGRAM ENTRY button was used, Client Name will show in Status Bar at bottom of page
  a The Jump button is available on most pages in Central Intake section
2 If Entry page was clicked in Navigation Bar, no Client will be active so search for the correct Client first
  a In Search fields at top of page, enter any combination of criteria –Client First/Last Name, Identifier
  b Click SEARCH button
  c If there is more than one match, all possibilities will appear in Customer dropdown
3 Search for Client(s) on Listing page (*see instructions for that page*)
  a Customer dropdown will display all matches
  b Blue arrows in Program Toolbar will scroll through available Clients - arrow pointing to a line goes directly to the first or last Client



4 Use customer dropdown or arrows to see these matches:
  a Household Members – click SHRINK LIST TO CURRENT HOUSEHOLD button 
  b Your own Clients - click SHRINK LIST TO CURRENT CASE WORKER button 
  c Client Group - click SHRINK LIST TO CURRENT GROUP button 

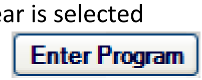
➤ *Always make sure correct Client is active on this page! Client name will show in Status Bar at bottom of page*

➤ *If JUMP TO PROGRAM ENTRY button (available on many Central Intake pages) was used, the Client name will show in the Status Bar at bottom of page*

➤ *If Entry page is clicked in Navigation Bar, search for the Client first using the search fields in the blue area at top of page*

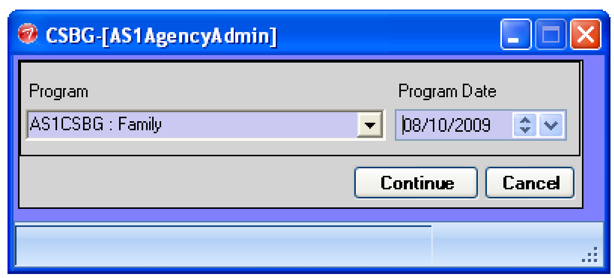
➤ *If a search is conducted on the Agency Client Listing page, all matches will be available on the Program Entry page in the Customer dropdown*

Enter Client into Program

1 Make sure correct Client is active on page
2 Make sure correct Operation Year is selected
3 Click ENTER PROGRAM button 

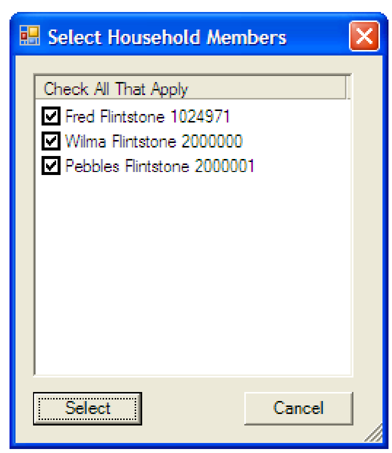
In popup window:

4 Select the Program in the Program dropdown
5 Select Program Entry Date
  a Default is today's date
6 Click CONTINUE



Some Programs may be set up to enroll Family or Household members, if so a popup window will appear

7 Click to remove checkmarks from any Household member that should NOT be entered into Program
  a Checkmark means client WILL be enrolled
8 Click SELECT
9 Select Program Status
  a Enrolled
10 Enter Comments if needed
11 Select Consent Level
12 Select Case Manager
  a This will default to User's Login name, but may be changed
13 Change Entry Date if needed
14 Click SAVE button



Select Household Members popup will appear again

15 Select Family/Household members who should have information saved to their record as above and click SELECT
  a Click to remove checkmarks from any Household member that should NOT have information saved
  b Checkmark means client WILL have information saved

Answer Entry Questions

Entry Questions are generated for the Program when the Client's Program Entry is created.

1 Read Question in Question box on left
2 Select or enter Answer in Answer field
   a If multiple answers are allowed, checkboxes will appear to click
3 Enter Comments when needed
4 Press Enter key or click NEXT to jump to next question
   a Some answers have jump logic built in to bring up next appropriate questions
   b PREVIOUS button returns to the last question
5 Repeat for additional questions
6 Click SAVE when finished

REQUIRED shows only those questions that are required; REFRESH brings them all back and also removes all answers entered before FINISH is pressed.

View Income Snapshot

When a Client is entered into a Program, the system automatically loads a snapshot of the Client's situation at the time of entry.
The Income Snapshot allows the User to:

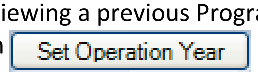
- Reset the Program Entry record to match what is currently in Central Intake
- Edit the Income and/or demographics linked to the Program Entry record
- Create an additional Snapshot to show the Client's current income situation

You do not need to do anything with the Snapshot unless a correction needs to be made to a Client Program Entry record or if you are creating additional Snapshots to show a change in income. See the next section for more information about using the Snapshot.

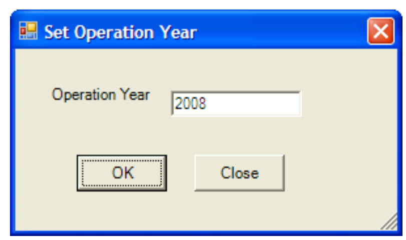
> ➤ *Income showing on the Program Entry page and in the Snapshot will remain the reported Income for the Client at the time of Program Entry*
>
> ➤ *If new Income Snapshots are added, the amount showing for Snapshot 1 remains what the Client had at the time of Entry*

Change Operation Year

Changing the Operation Year allows viewing a previous Program Year's data

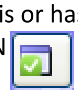
1 Click SET OPERATION YEAR button 

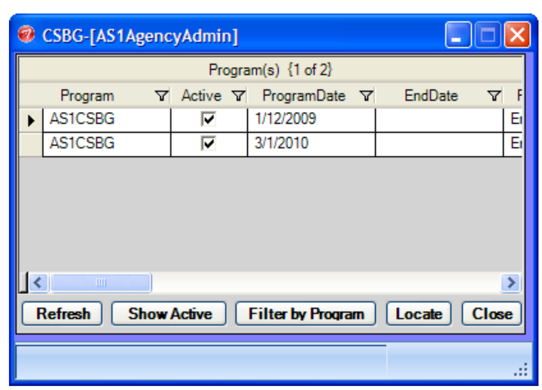
2 In popup window, enter Year
3 Click OK



Change selected Program or View all Programs Client is enrolled in

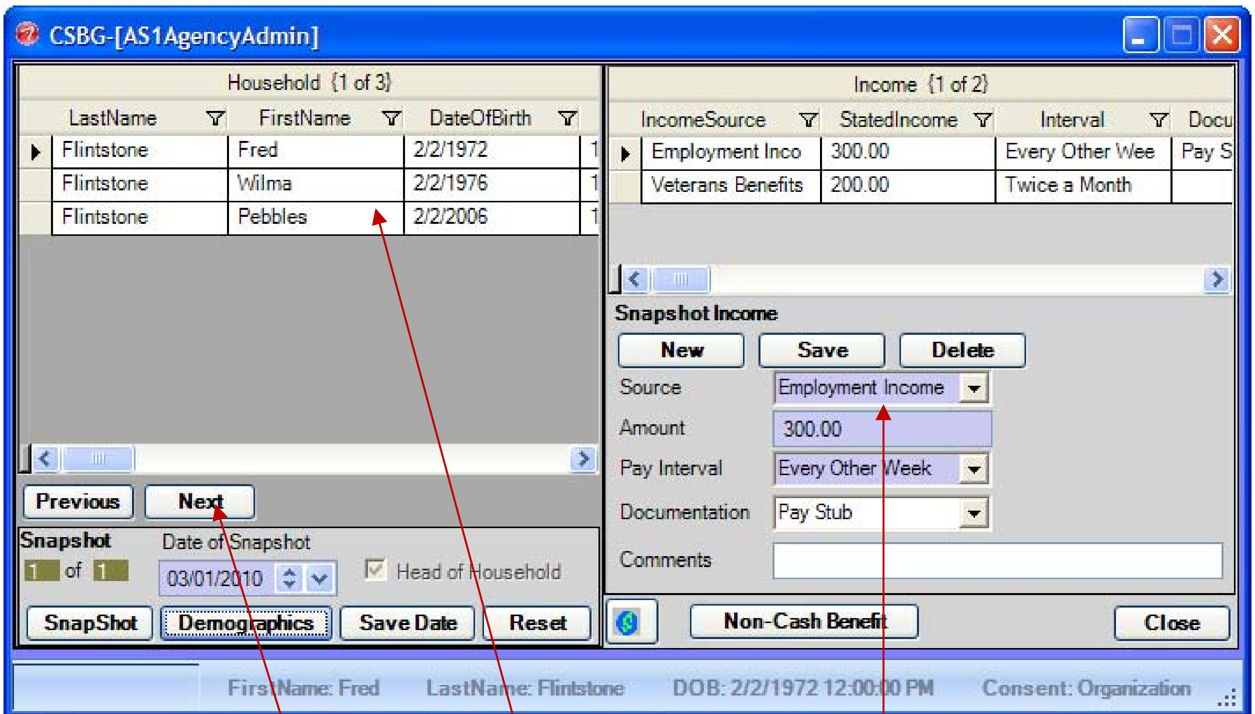
The popup window displays all Programs a Client is or has been entered in and the start and end dates of each one.

1 Click VIEW PROGRAMS CLIENT IS ENROLLED IN 
2 To change to a different Program:
   a Select that Program in the PROGRAM(S) GRID
   b Click the LOCATE button
   c Click the CLOSE button
   d If the Program is in a different Operation Year, a popup screen will let you know it is changing the Operation Year and ask if you want to continue
3 To show only active Programs in the popup:
   a Click the SHOW ACTIVE button
4 To show ALL Programs again
   a Click the REFRESH button
5 To show all records for the Client in a given Program:
   a Select the program in the PROGRAM(S) GRID
   b Click the FILTER BY PROGRAMS button



Income Snapshot

The Income Snapshot is a picture of the Client's situation, including demographics, income and household members, that is taken at the time of Program Entry. Many reports use the information from the Snapshot instead of pulling directly from Central Intake. You do not need to do anything with the Snapshot unless you are making a correction or creating an additional Snapshot. The original Snapshot (1 of 1) should always reflect their status at the time of Program Entry, not any changes that occurred after the time of entry.

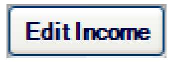


Navigating the Income Snapshot

- All Household members appear in HOUSEHOLD GRID, select one to view their information
- View income records of selected household member on right side of snapshot
- If multiple Snapshots exist, PREVIOUS and NEXT will display other snapshots
- SNAPSHOT button creates additional snapshot record
- DEMOGRAPHICS button opens window to edit demographic information for selected client
- SAVE DATE allows changing date of selected snapshot
- RESET changes all information to what is currently in Central Intake

View Income Snapshot

When a Client is entered into a Program, the system automatically loads a snapshot of the Client's situation at the time of entry. Depending on the way the Program is setup, the Snapshot may include information about Family or Household members and their demographic and income information. All members of the family or household have their own Snapshot if they are entered in the Program.

1 Click the EDIT INCOME button to view snapshot 

The Income Snapshot allows the User to:

- Reset the Program Entry record to match what is currently in Central Intake
- Edit the Income and/or demographics linked to the Program Entry record
- Create an additional Snapshot to show the Client's current income situation

> ➤ *Income showing on the Program Entry page and in the Snapshot will remain the reported Income for the Client at the time of Program Entry*
>
> ➤ *If new Income Snapshots are added, the amount showing for Snapshot 1 remains what the Client had at the time of Entry*

Correcting a Snapshot

If Client Income or demographics were entered incorrectly in Central Intake, they can be corrected on the household page and then reset in the Snapshot. Some corrections can also be made directly on the Snapshot, but will then NOT be corrected on the Central Intake pages.

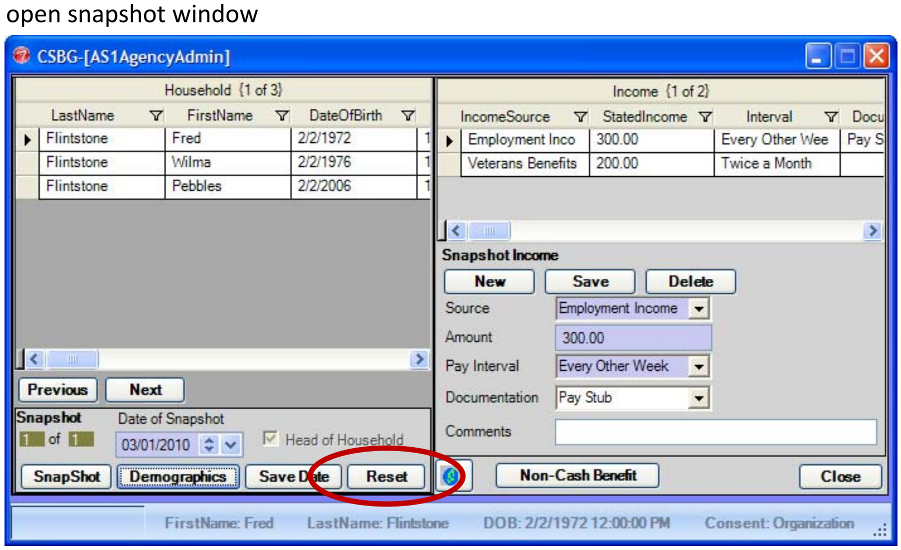
Two things that cannot be corrected on the Snapshot and must be made in Central Intake are adding household members and changing a Date of Birth.

If the Program is set up to enter multiple members of the household or family, correcting the Snapshot will allow the corrections to be applied to the Snapshots of all members of that family or household.

Reset income and/or demographics to make a correction

If Client Income was entered incorrectly in Central Intake, it can be corrected on the household page and then reset here in the Income Snapshot screen. The RESET button will remove any new Snapshots that have been taken.

1 Click the JUMP TO DEMOGRAPHICS button in top right corner 
   a This opens the household page with this Client active
   b The button is available on most pages in the HMIS Program library
2 Select the correct Household member in the HOUSEHOLD MEMBERS GRID at the top of the page
3 Change demographics and/or income records as needed
   a See *Central Intake User Guide* for more information
4 Additional household members can be added as well if needed
5 Return to Program Entry page with GO TO ENTRY button
6 Click EDIT INCOME button to open snapshot window
7 Click the RESET button at the bottom of the window
   a This changes the snapshot information to match the current Central Intake, including income, demographics, address and HH members
   b A popup window may appear to select whose snapshot should also be changed
8 Click CLOSE to close the Snapshot window



Edit Income Snapshot to make a correction

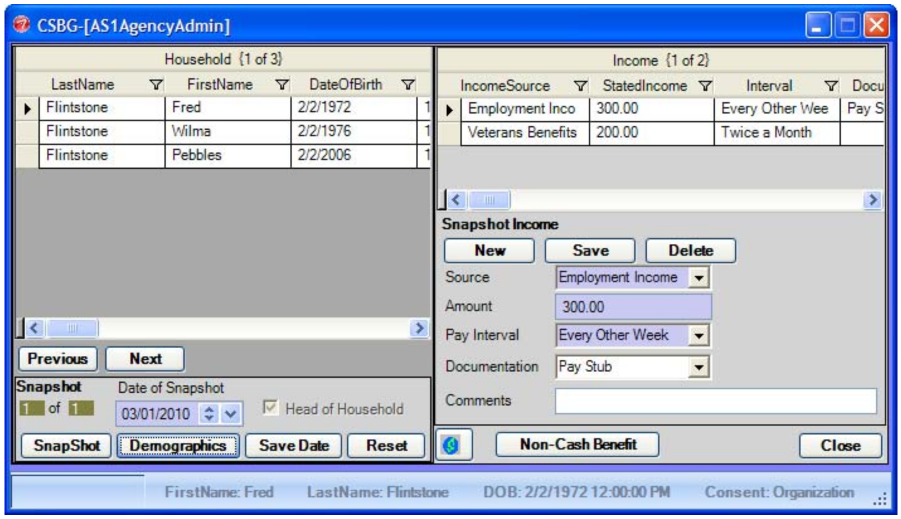
Income records may be edited here; it will *not* change what is shown on Central Intake pages. DOB cannot be changed here and new household members cannot be added; those changes must be made in Central Intake and then reset the snapshot as described above.

1 Click EDIT INCOME button

2 Make sure correct snapshot is showing with NEXT or PREVIOUS buttons
   - a Program Entry is always 1 of 1

3 Select Client in HOUSEHOLD GRID

4 To add income record:
   - a Click the NEW button
   - b Select Source of income
   - c Enter Amount
   - d Select Pay Interval
   - e Select Documentation
   - f Enter Comments
   - g Click SAVE button
   - h Repeat for additional Income records



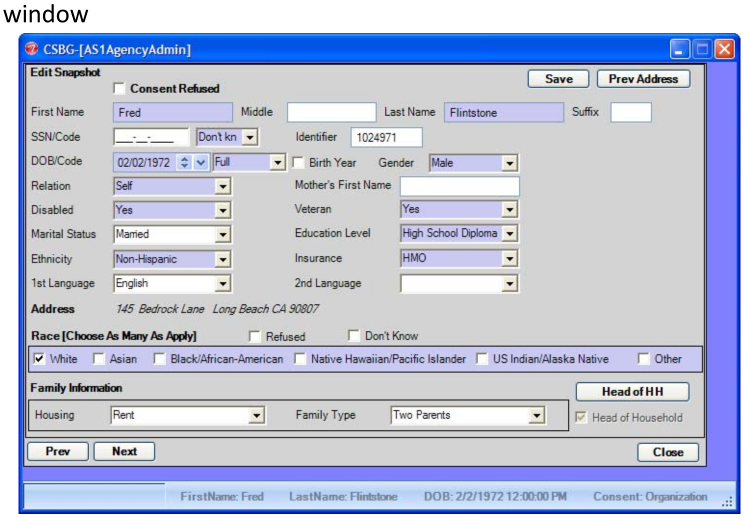
> ➤ *Remember to select the correct Snapshot before making any changes; use PREVIOUS or NEXT to change, the number and date of the Snapshot will change*

5 To edit income record:
   - a Select the income record in INCOME GRID on right side
   - b Make necessary changes to Source, Amount, Interval
   - c Click SAVE button

6 To enter any non-cash benefits for the Client:
   - a Click the NON-CASH BENEFITS button in the snapshot popup
   - b Check the appropriate boxes
   - c Click the SAVE button

7 To delete income in the snapshot popup:
   - a Select income record in INCOME GRID
   - b Click the DELETE button on right side of window

8 To edit demographic information
   - a Click the DEMOGRAPHIC button
   - b In the popup window, make changes
   - c Use PREV or NEXT to bring up next household member demographic information if needed and make changes in their information
   - d Click SAVE button
   - e Click CLOSE to close popup window



9 To change Client Address
   - a Click the DEMOGRAPHIC button
   - b In the popup window, click PREV ADDRESS button
   - c In the popup window, select address to be used
   - d Click SELECT
   - e Use PREV or NEXT to change other household member's address record
   - f Click CLOSE in demographics window

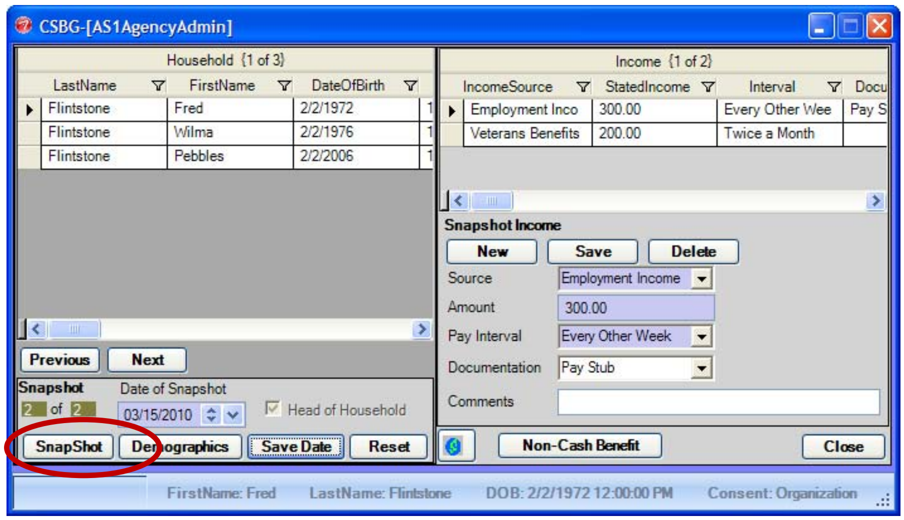
10 Click CLOSE button when finished

Create an ADDITIONAL Income Snapshot

Save a record of changes in Client income at a point in time, this will be in addition to their Program Entry snapshot. The information can be updated in Central Intake first and then the snapshot is taken here. If the snapshot is taken and then edited, those changes will not be reflected in Central Intake.

- **To make the changes in Central Intake and then record them in the Snapshot:**

1. Follow the instructions above for *Reset Income* just #1 – 6
2. On the Income Snapshot popup window, click the SNAPSHOT button (not the RESET button)
   a. This will take a snapshot of the income from the demographic and put today's date with the record



3. Numbers above the SNAPSHOT button will change to reflect the new snapshot and total number of snapshots
4. If the income has already been changed in Central Intake, that income will appear in the INCOME GRID
5. If the date needs to be changed, select the correct date in Date of Snapshot, then click SAVE DATE button

- **To make the changes only in the Snapshot and not in Central Intake:**

6. Click EDIT INCOME button to open Snapshot window
7. Click SNAPSHOT button in lower left corner
   a. Numbers above button will change to reflect new snapshot
8. Select Client to edit in HOUSEHOLD GRID
9. Make changes to income record
   a. Click NEW to add additional income records
   b. Make changes to existing income record
10. Click SAVE button
    a. Use DELETE to remove unwanted income record
11. Repeat #3 – 5 for additional household members
12. If the date needs to be changed, select the correct date in Date of Snapshot, then click SAVE DATE button

Change the date of a Snapshot

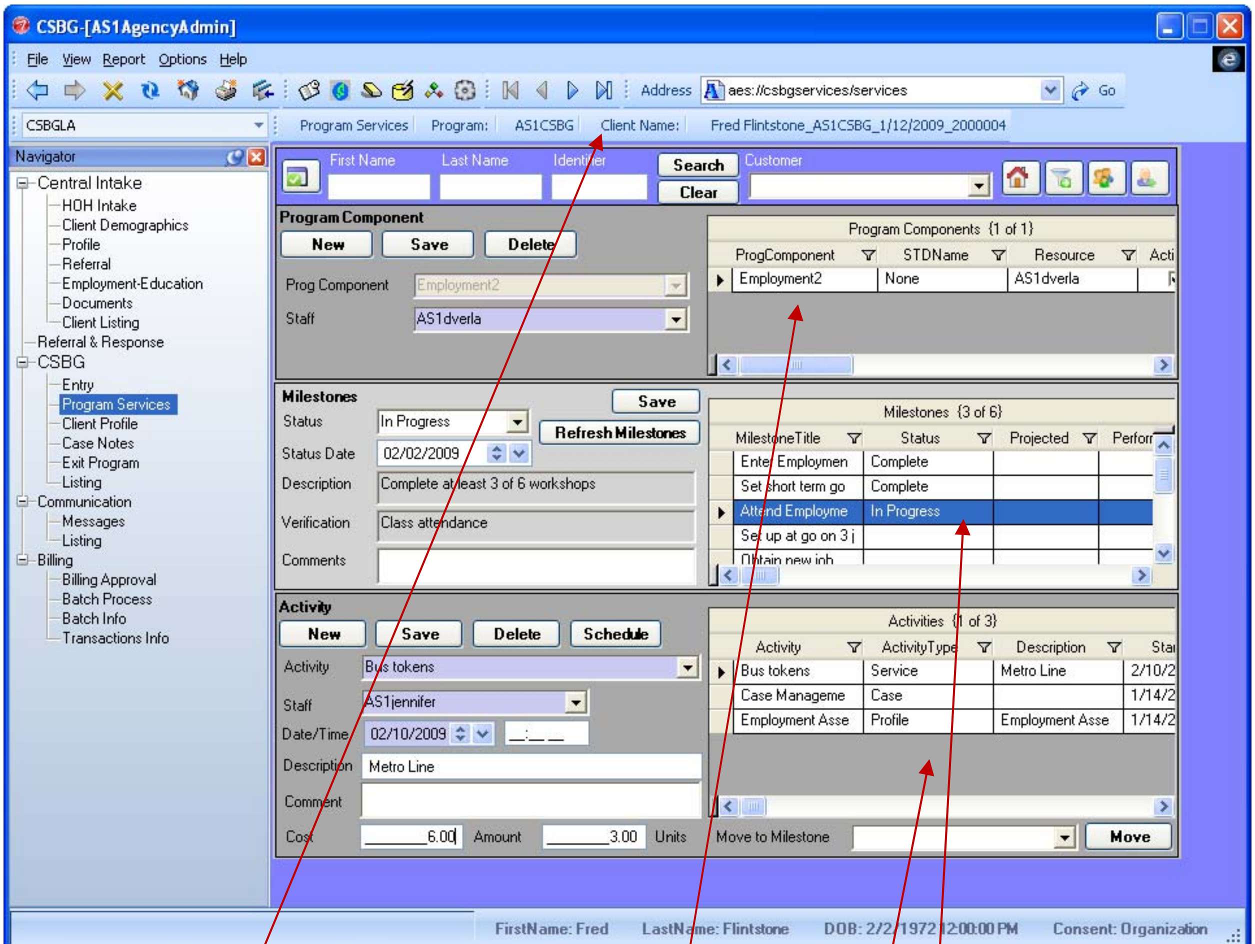
1. Click EDIT SNAPSHOT button to open Snapshot window
2. Click PREVIOUS or NEXT button to select correct Snapshot
   a. Numbers and Date will change with each Snapshot
3. Select new Date in Date of Snapshot field
4. Click SAVE DATE button
5. Click CLOSE when finished

➤ *Remember to select the correct Snapshot before making any changes; use PREVIOUS or NEXT to change, the number and date of the Snapshot will change*

Program Services Page

The Program Services page displays all Program Components, Activities, and Milestones for the active Client and becomes a Permanent Record.

This information will be used to create Reports showing what kinds of activities and how much of each were needed to achieve various results and will allow the Agency to make programmatic, staffing and resource decisions to increase Client Outcomes.



Navigating the Program Services Page

- Active Client is always displayed in Status Bar at bottom of page
- Active Program, Client and Start Date are displayed in top blue area
- Program Components are displayed In the <u>Program Components Grid</u>
- Milestones of selected Program Component are displayed in the <u>Milestone Status Grid</u>
- Activities linked to the selected Milestone are displayed in the <u>Activity Grid</u>

Select Client and Program

Active Client and Program appear on top line. To select a different Client and/or Program, see instructions on *Common Elements to CSBG* page

Generate Program Component for Client

Some Program Components may be generated automatically upon Program entry.

To add additional Program Components:

1 Click NEW button
2 Select Program Component
   a Dropdown will show all Program Components connected to the Program
3 Select Staff Member
4 Click SAVE button
   a Program Component will appear in PROGRAM COMPONENT GRID
   b Milestones will appear in MILESTONES GRID
5 Repeat for additional Program Components if needed

Use DELETE button to remove unwanted Program Component

- Program Component may not be removed if Activities are created

> ➤ *A Program Component must be generated in order to record Activities and Milestone accomplishments;*
>
> ➤ *The Program Component must have Milestones created for the current year in order to be generated*
>
> ➤ *A Client may have multiple Program Components generated, but only one's Milestones and Activities may be displayed on the page at a time*

Change Milestone Status

Record Milestone accomplishments here in order to produce specific reports.

1 Make sure correct Program Component is selected in PROGRAM COMPONENT GRID
2 Select Milestone to be updated in the MILESTONES GRID
   a Description and Verification will then show on the left side of the page
3 Select Status
   a Complete, In Progress, Unsuccessful, N/A
4 Select the Status Date
   a This is the date the Milestone Status was changed
5 Enter Comments if needed
6 Click SAVE when finished
7 Repeat for additional Milestone accomplishments

> ➤ *If new Milestones are added during a Program Year, they will not be displayed in the Program Components already generated for Clients. Click the REFRESH MILESTONES button to display the new Milestones*

Create Activity record

1 Make sure correct Milestone is selected in MILESTONES GRID
2 Click NEW button in Activities section at bottom of page
3 Select Activity in dropdown
4 Select Staff person
5 Enter Date and Time or End Date
6 Enter Amount of Activity in units, minutes, days or cost
7 Select Location
8 Enter Description and Comments
9 Click SAVE
   a Use DELETE button to delete unwanted Activity records

Activity will appear in ACTIVITIES GRID.

10 Enter additional Activities if needed, make sure correct Milestone is selected for each one

> ➤ *Each Activity is linked to one Milestone, so be sure to select the correct Milestone when recording Activities*
>
> ➤ *Some Activities will be recorded on other pages but will be displayed on this page when linked to a Milestone; they will appear grayed out here*
>
> ➤ *Some Activities will calculate a Total Cost when SAVE is clicked*

Move Activity to different Milestone

If an Activity has been recorded and linked to the incorrect Milestone:

1 Select Activity in Activities Grid
2 Select correct Milestone in Move to Milestone dropdown at bottom of page
3 Click MOVE button

To see Activity again, click on correct Milestone in Milestones Grid and Activity will appear in Activities Grid.
Profile and Case Note activities will not be able to be moved here, but may be moved on the Profile and Case Notes pages.

➤ *Activities are linked to Milestones; click on each Milestone to see all the Activities linked to it*

➤ *Since Activities recorded on other pages appear here, a Client's entire history can be viewed on this page by clicking on each Milestone*

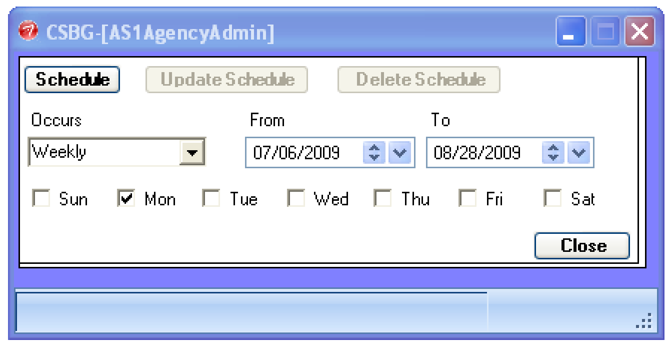
Schedule Multiple instances of an Activity

If an Activity will repeat, use the Schedule:

1 Select the Activity in Activities Grid
2 Click SCHEDULE button

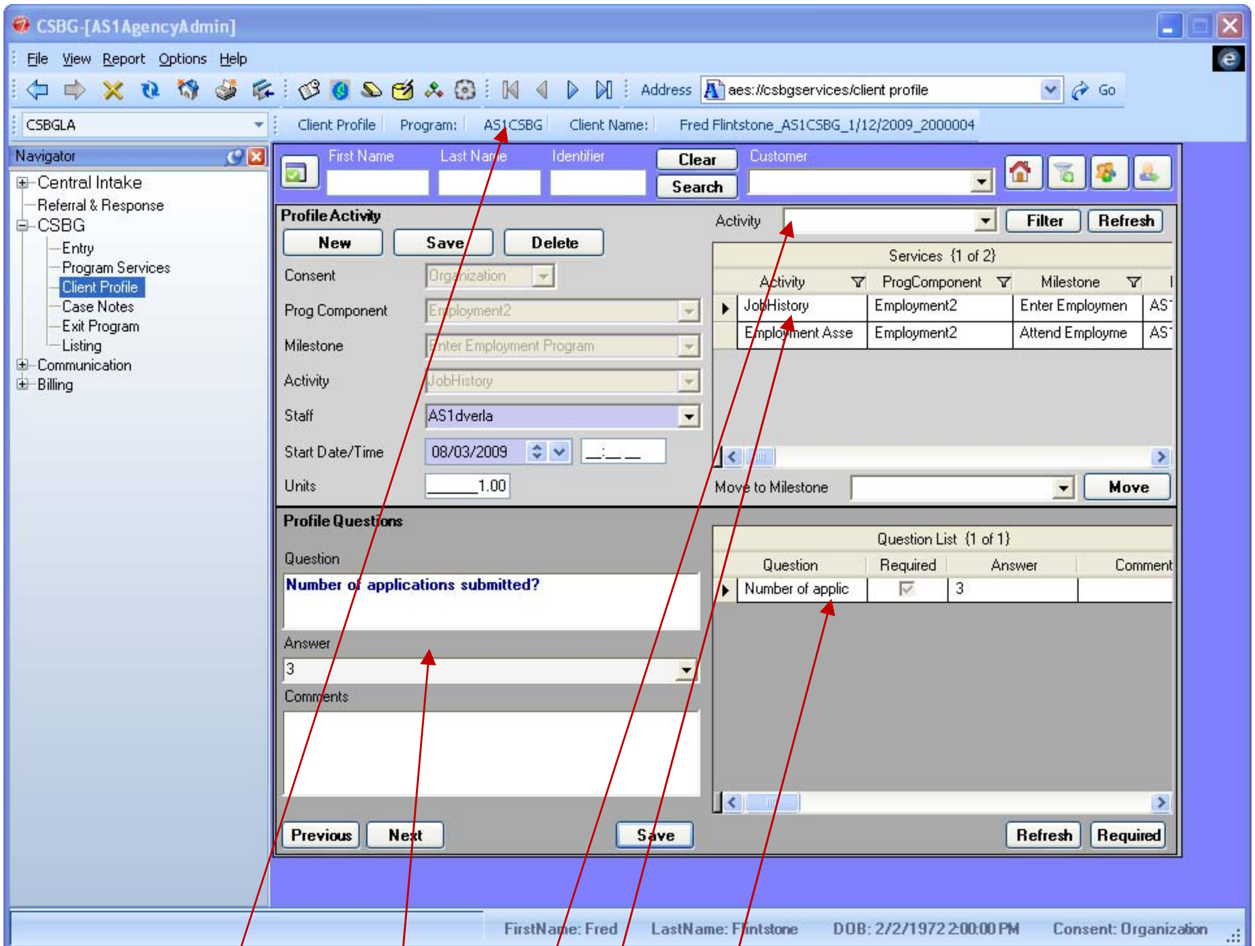
In popup window:

3 Select Interval Type
   a This is how often the Activity will occur
4 Select From Date
   a This is the date Activity will start
5 Select To Date
   a This is the date Activity will end
6 Click to create checkmark in day of week boxes that Activity will happen
7 Click SCHEDULE at top of window
8 Click CLOSE



Client Profile Page

The Client Profile page provides a set of questions for the Client to answer based on a particular Service. The appropriate Program Component, Milestone and Service will be chosen on this page to generate the questions. Question sets are maintained by the Agency and/or the Collaborative.



Navigating the Client Profile Page

- The top light blue line shows the Page, Program currently displayed and active Client
- All existing Profiles will appear in the SERVICES GRID
- Answer questions in the bottom left area
- Questions for selected Profiles section will appear in the QUESTION LIST GRID
- Filter the list of Activities with this Activity dropdown

Select Client and Program

Active Client and Program appear on top line. To select a different Client and/or Program, see instructions on *Common Elements to CSBG* page

Create a new Profile/Assessment

1 Make sure correct Client is selected
2 Click NEW button
3 Select Consent Level
4 Select correct Program Component
5 Select correct Milestone
6 Select Activity
  a The selected Activity determines which Questions are generated
7 Select Staff member
8 Select Date Profile was conducted
9 Enter number of Units
10 Click SAVE button
  a The Assessment will appear in SERVICES GRID; Questions will appear in QUESTION LIST GRID
  b Use DELETE to remove unwanted profile records; a warning message will appear asking if you are sure before the deletion occurs

Answer Profile Questions

1 Read Question in Question box on left
2 Select or enter Answer in Answer field
  a If multiple answers are allowed, checkboxes will appear to click
3 Enter Comments when needed
4 Press Enter key or click NEXT to jump to next question
  a Some answers have jump logic built in to bring up next appropriate questions
  b PREVIOUS button returns to the last question
5 Repeat for additional questions
6 Repeat for additional questions
7 Click SAVE when finished

REQUIRED shows only those questions that are required; REFRESH brings them all back and also removes all answers entered before SAVE is clicked.

Move Activity to different Milestone

If a Profile Activity has been recorded and linked to the incorrect Milestone:

1 Select Activity in SERVICES GRID
2 Select correct Milestone in Move to Milestone dropdown at bottom of page
3 Click MOVE button

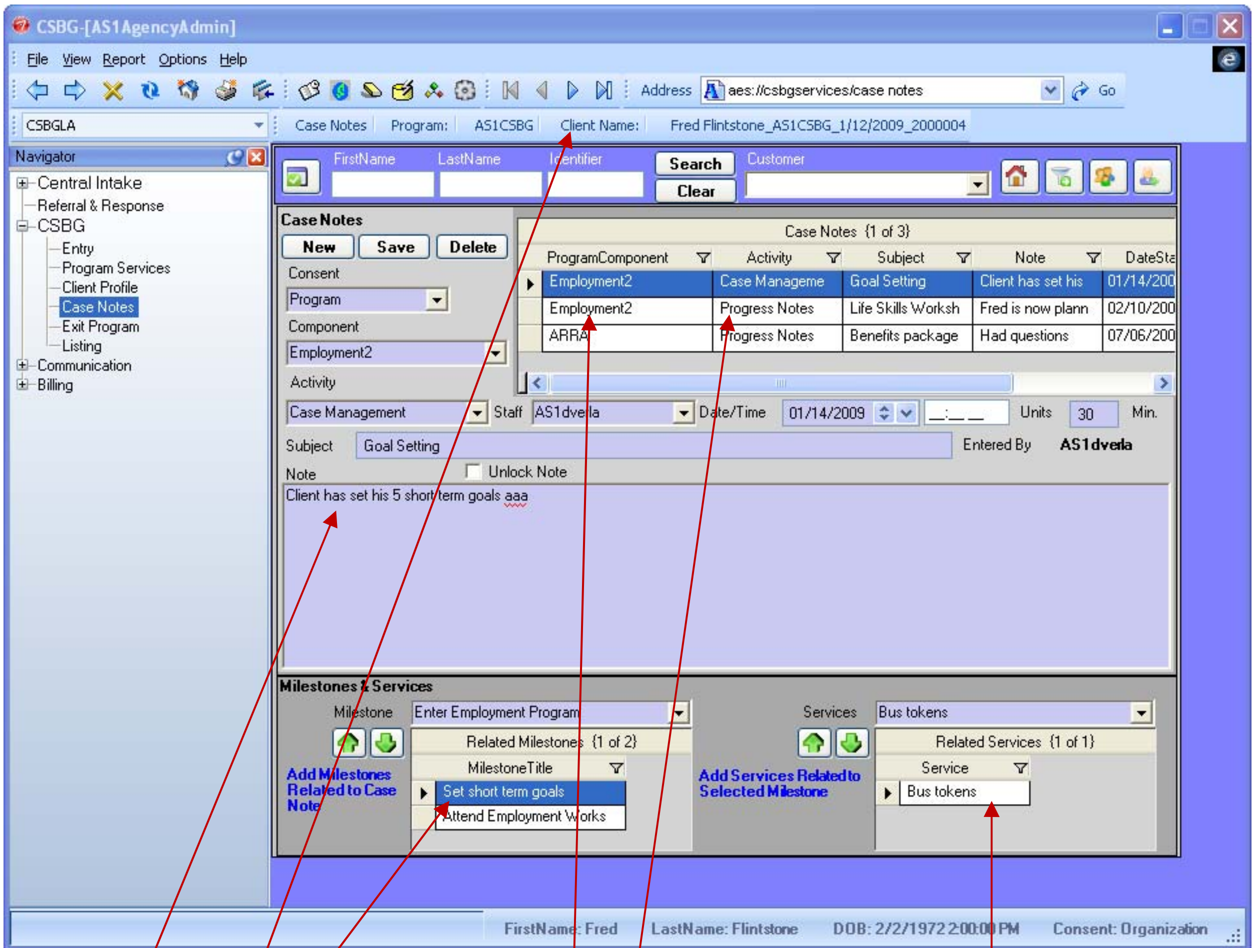
Activity will now appear on the Service Provider page linked to this Milestone.

View Profile/Assessment Questions and Answers

1 Make sure correct Client is selected
2 Select Profile in SERVICES GRID at top of page
3 If there are many Profiles available, select desired Profile in Activity dropdown at top of page
4 Click FILTER button
  a Just those Profiles will appear in SERVICES GRID

Case Notes Page

Case Notes are for keeping track of Client meetings, needs, and trends pertaining to a particular program. Notes can be kept private by changing Security Level. Case Notes may be linked to more than one Milestone and additional Services may be recorded on this page.



Navigating the Case Notes Page

- The top light blue line shows the Page, Program currently displayed and active Client
- All Case Notes will be displayed in the <u>CASE NOTES GRID</u>
- Text of the Case Note is displayed in middle section
- All Milestones connected to the Case Note are displayed in the bottom left section
- Any additional Services recorded and connected to the selected Milestone are displayed in the bottom right section

Create new Case Note

1 Click NEW button
2 Select
   a Consent Level
   b Program Component and Activity
   c Staff member
   d Date and Estimated Time
   e Subject of Note
3 Entered by will automatically record current User ID
4 Enter Note text
5 If the Note should be editable by other users, click to create checkmark in Unlock Note checkbox
   a Leaving the checkbox unchecked means only this User can edit the Case Note
   b Only the User can unlock the Case Note
6 Click SAVE button

A message will appear with a reminder to attach one or more Milestones to the Case Note

7 Click OK in popup message window
8 Select Milestone in Milestone dropdown
9 Click ADD MILESTONE button 
   a Use REMOVE MILESTONE button to remove unwanted Milestone 
10 Select additional Milestone(s) to link if needed
11 Use DELETE to remove unwanted Case Notes
   a All Milestones must be removed from Case Note before it can be deleted

➤ *Different Consent Levels can be used for each Case Note; Users will be able to view only those Case Notes for which they have correct permission*

➤ *View a different Case Note by selecting it in the grid; the text will appear in the Notes box*

Add additional Services

Case Managers can record additional Services for a Client on this page instead of having to return to the Services Provided page each time. Services cannot be added until a Milestone is linked to Activity.

1 Make sure correct Milestone is selected to link Activity to
2 Select Activity in Services dropdown
3 Click ADD SERVICE button in Services area 
   a Use REMOVE SERVICE to remove unwanted Service 

Spell Check Case Note

If a word is misspelled, a red wavy line will appear beneath it.

1 Click in the Navigation Bar or outside the Note text box
2 To accept the suggestion listed in Change To: field -
   a Click CHANGE
   b Click CHANGE ALL to accept the suggestion for all instances
3 To accept a different suggestion -
   a Click on the suggested word, then click CHANGE
4 To ignore the misspelling -
   a Click IGNORE ONCE OR
   b Click IGNORE ALL to accept the spelling for all instance
5 To add a word to your own dictionary (useful for names) -
   a Click ADD TO DICTIONARY

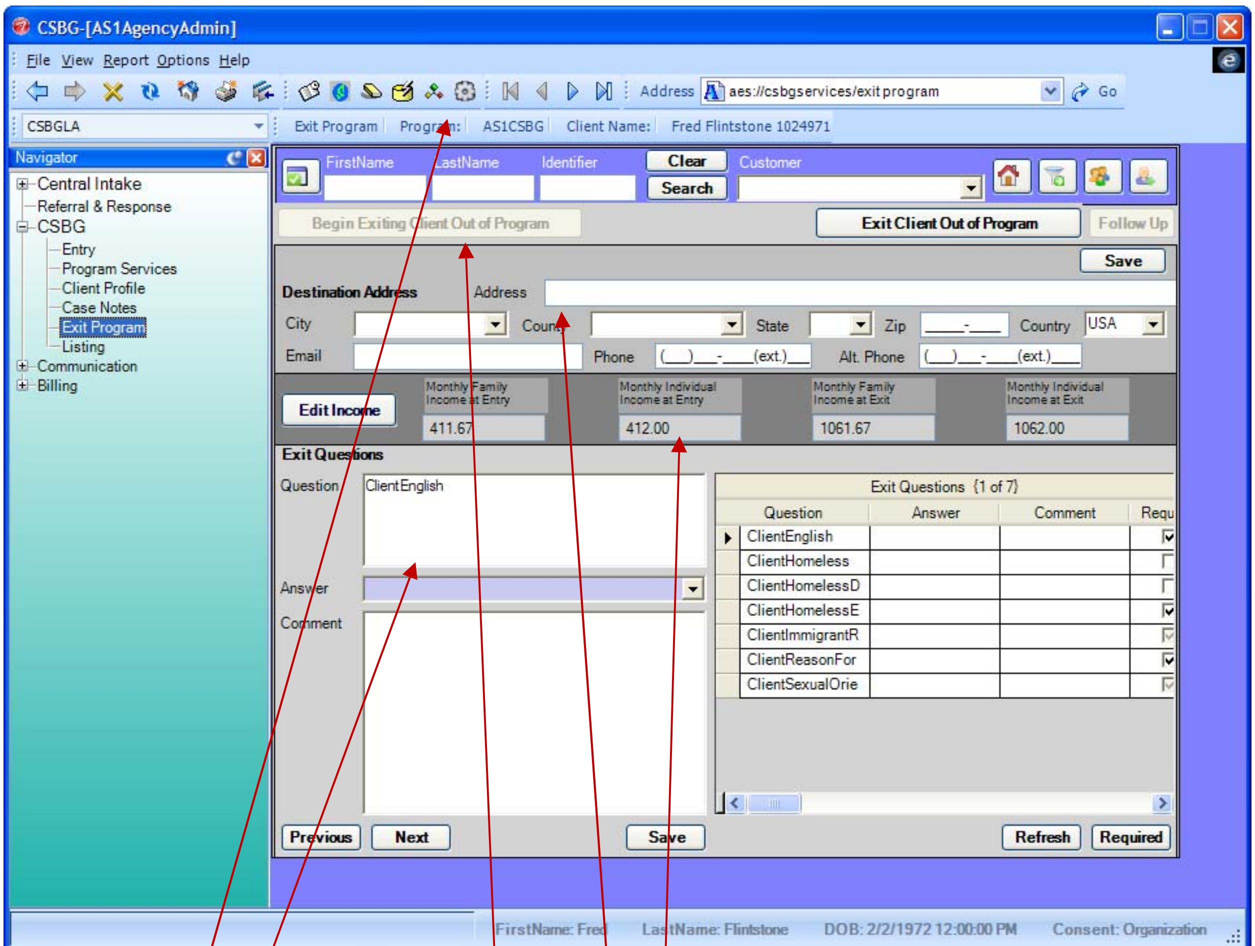
Unlock Case Note

Only the original user can unlock a case note once it has been locked

1 Select the record in the Case Notes Grid
2 Click to create checkmark in Unlock Note checkbox

Program Exit Page

The Exit Program page is for discharging a client from a Program; there may be exit questions that appear for Clients to answer before exiting. Once a Client is exited from a Program, the Program records are locked and cannot be changed or added for that time period, but may be viewed and reported; the intake and demographic information will still be available. The Client's income should be changed in Central Intake prior to beginning the exit process.



Navigating the Program Exit Page

- The top light blue line shows the Page, Program currently displayed and active Client
- BEGIN EXITING CLIENT OUT OF PROGRAM button begins exit process
- Address information will be entered in upper section
- Exit Questions may appear in bottom section
- Entry and Exit income are displayed in the middle section

Select Client and Program

Active Client and Program appear on top line. To select a different Client and/or Program, see instructions on *Common Elements to CSBG* pages

> ➤ *Once a Client has been exited from a Program, **no further changes or additions to their records are allowed**. Records may still be viewed and used in reports*

Begin Exit process

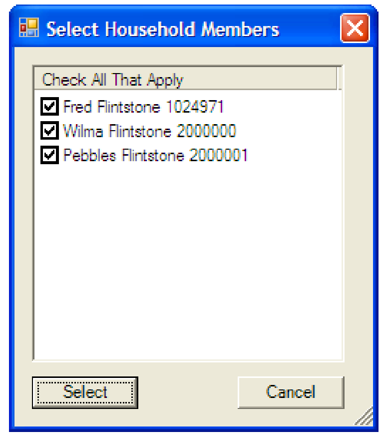
Make sure all Client records are up to date, including Services, Case Notes, Milestones; they will not be able to be modified after Exit!

If the Client's income has changed since Program Entry, it should be changed in Central Intake before beginning the exit process (see *Change Income in Central Intake* below).

1 Make sure correct Client is selected

2 Click BEGIN EXITING CLIENT OUT OF PROGRAM button

Some Programs may be set up to exit Family or Household members, if so a popup window will appear



3 Click to remove checkmarks from any Household member that should NOT be exited from the Program
   a Checkmark means client WILL be exited

4 Click SELECT

5 This causes Income Snapshot to be taken and Exit Questions to appear in bottom section
   a If Exit income does not reflect current income from Demographics page, click Refresh button in toolbar
   b Make sure correct Client is still active on page after refresh

6 Enter new address information
   a If new address is not known, enter UNKNOWN

7 Click SAVE button at top of page

Select Household Members popup window will appear again to show members who should have this information saved to their records.

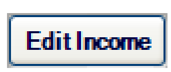
8 Click to remove checkmarks from any Household member that should NOT have information saved
   a Checkmark means client WILL have information saved

9 Click SELECT button

Update Exit Income

Income may be updated in Central Intake or in Income Snapshot. If it is changed in the Income Snapshot, it will NOT be changed in Central Intake. If it is changed before exit in Central Intake, it will automatically be updated on this page; you may need to click the REFRESH button in the toolbar to view the changed income.

Update Income information in Income Snapshot



1 Click EDIT INCOME button

In the popup window:

2 Make sure last SNAPSHOT is visible
   a Today's date will appear in Date field
   b Number beneath Snapshot will indicate last one (2 of 2, 3 of 3)
   c Click NEXT button to display next Snapshot if last Snapshot is not showing

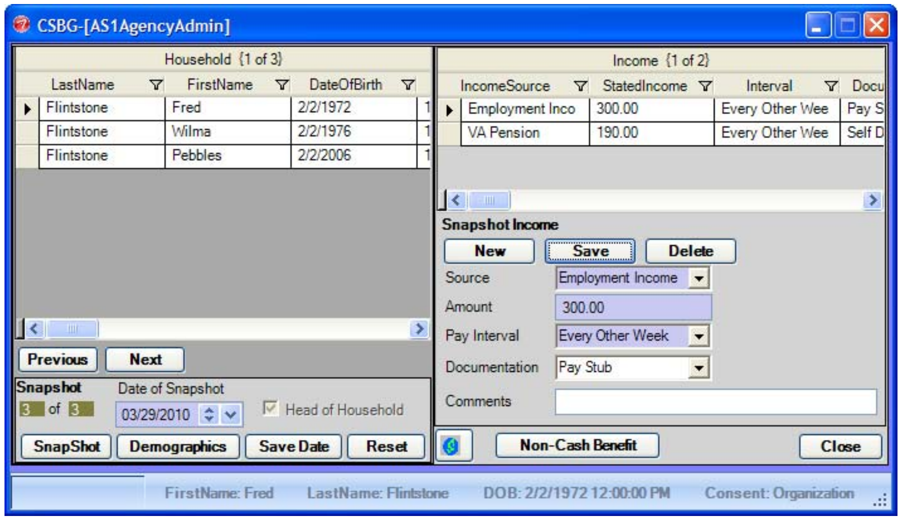
3 Select Client in Household Grid on left side of window

4 Make adjustments to Client income record
   a Select Income record in Income Grid and make changes, then click SAVE
   b Click NEW to add additional Income record
   c To delete existing record, select it in Income Grid and click DELETE

5 Click SAVE

a Use DELETE to remove unneeded income records
6 Click NON-CASH BENEFIT to add any non-cash benefits
7 Click CLOSE button

The Exit Income will update on screen if changed.



Change income in Central Intake

This step is necessary only if the Client's income has changed since Program Entry and has not already been updated in Central Intake.

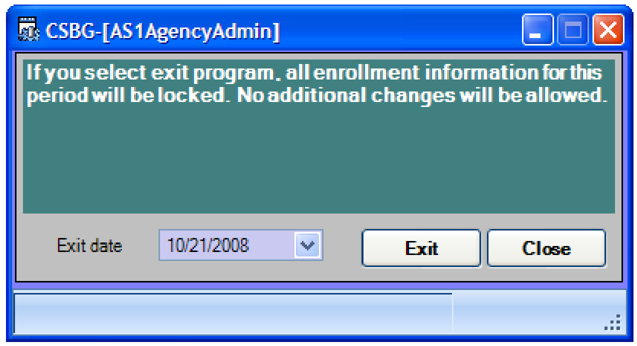
1 Click the JUMP TO DEMOGRAPHICS button in top right corner 
   a This opens the Demographics page with this Client active
2 Select the record to change in the Income Grid on right side of page
3 Change any of the following as needed:
   a Income Source
   b Stated Income
   c Pay Interval
   d Documentation
4 Click SAVE button
5 To delete an unwanted income record:
   a Select that record in the Income Grid
   b Click DELETE
6 To add an additional income record:
   a Click NEW in the income section
   b Select Income Source, Enter Stated Income, Select Pay Interval
   c Select Documentation
   d Enter Comments if needed
   e Click SAVE button
7 To add non cash benefit details, click NON CASH button
   a In popup window, click in checkboxes to create checkmark next to any benefits received by this Client
   b Click SAVE, then click CLOSE
8 If other Household members will also be exited, select their record in the Household Member Grid at the top of the page, and update their income record in this same way
9 Return to Program Exit page and continue Begin Exit process above

Answer Program Exit Questions

1 Read Question in Question box on left
2 Select or enter Answer in Answer field
  a If multiple answers are allowed, checkboxes will appear to click
3 Enter Comments when needed
4 Press Enter key or click NEXT to jump to next question
  a Some answers have jump logic built in to bring up next appropriate questions
  b PREVIOUS button returns to the last question
5 Repeat for additional questions
6 Click SAVE when finished

REQUIRED shows only those questions that are required; REFRESH brings them all back and also removes all answers entered before SAVE is clicked.

Complete Exit Process



The EXIT CLIENT OUT OF PROGRAM button will not be active until the BEGIN EXITING CLIENT OUT OF PROGRAM button has been used.

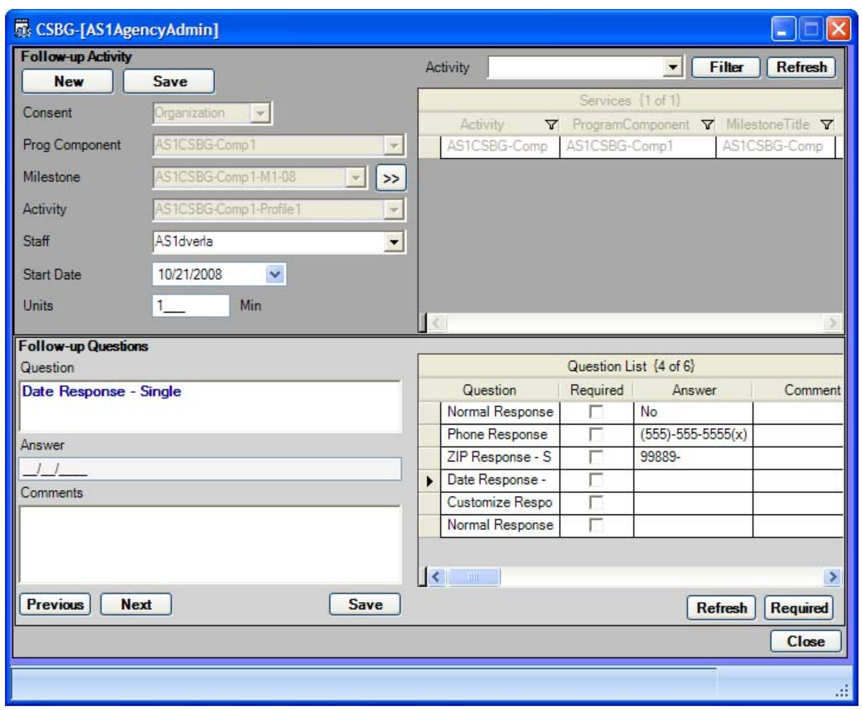
1 Click EXIT CLIENT OUT OF PROGRAM button

A Confirmation popup window will appear; if unsure of Exit, click CLOSE

2 Enter Exit Date
3 Click EXIT button

NOTE: Once a Client is exited, their Program information can no longer be edited.

Create Follow Up record



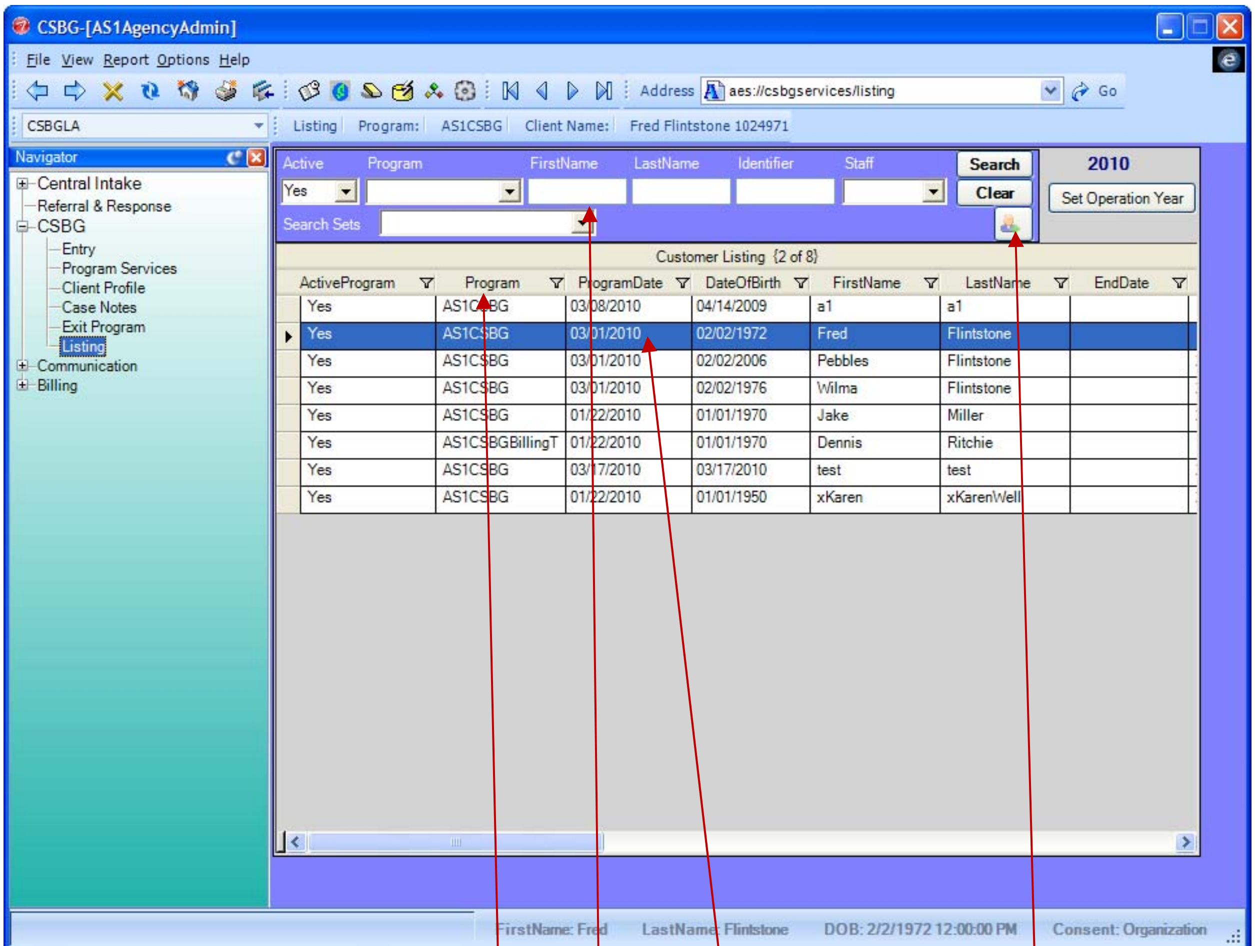
The FOLLOW UP button will not be available until the Client has been exited using the EXIT CLIENT OUT OF PROGRAM button

1 Click FOLLOW UP button to open popup window
2 Click NEW
3 Select Consent Level
4 Select Program Component
5 Select Milestone
6 Select Activity
7 Select Staff
8 Select Start Date
9 Enter number of Units
10 Click SAVE at top of page
  a Activity will appear in SERVICES GRID and Questions will appear in QUESTION LIST GRID
11 Answer Questions
12 Click SAVE button beneath questions when finished
13 Repeat for additional follow up activities if needed
14 Click CLOSE when finished

Listing Page

The Listing page lists all of the Clients in the system that the User has access to see based on Security Rights. Clients can be sorted by any existing criteria. Only the first 200 Clients will be displayed, select a different set of Clients with the Search Sets dropdown.

Highlight a Client record to use that Client on any of the CSBG section pages.



Navigating the Client Listing Page

- Search by any combination of parameters in top blue section
- All Clients matching search criteria will be displayed in the CUSTOMER LISTING GRID
- Sort the records by clicking on any Column Heading
- When selecting a Client record, make sure to click in the box to the right of the row so the entire row is highlighted in blue
- To jump back to the selected Client demographic record, click the JUMP TO DEMOGRAPHICS button

Quickly search for a Client

1. Enter any one or more of:
   a. Name, Program, Staff
2. Click SEARCH button
   a. All matching Clients will appear in CUSTOMER GRID

Other Ways to Search for a Client

Click SEARCH after any of these selections:

1. To find all active Clients in a Program
   a. Select YES in Active dropdown
   b. Select Program in program dropdown
2. To find all active Clients in *any* Program
   a. Select YES in Active dropdown
3. To find all Clients linked to a specific Staff Member
   a. Select Staff Member in Staff dropdown
4. To find all Clients regardless of Program Entry
   a. Enter % in Last Name field (% is a wildcard and can be used alone or with other characters)
5. To find all Clients from other Program Year
   a. Click SET OPERATION YEAR button
   b. Change to correct year
   c. Click OK button
6. If more than 200 Clients match the parameters, the Search Sets dropdown will list the sets available
   a. Select the set of Clients to view in the Search Sets dropdown

> ➤ *Only Clients for which the User has rights to view will be displayed in the grid. If a Client Program Entry is set at Private, they will not show up in the Listing unless the User has rights to view private records*
>
> ➤ *The entire name does not need to be entered; sometimes just a few letters will find the correct Client*
>
> ➤ *Click the SEARCH button without any entry to find all Clients*
>
> ➤ *Use the wildcard - % - with other letters to find all names that contain those letters (i.e. %on will find all names that include the letters on, like Jones or Patterson*

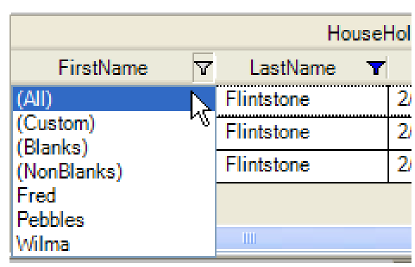
Sort Clients appearing in the Grid

1. Click a Column Heading to sort by that item
   a. A small arrow will be visible on the right side of the column heading showing the sort order
2. Click again to sort in the reverse order

Rearrange Column Order

1. Click a Column Heading to move to a different location in the Grid
2. Drag Column Heading to new location
   a. Columns will not stay in this order for the next login

Filter Client List

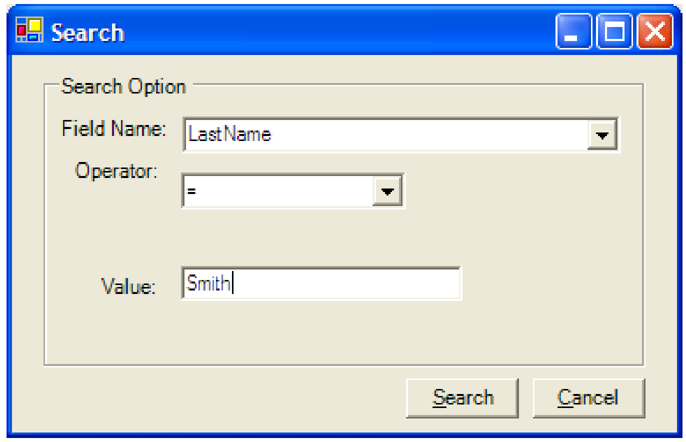


1. Click the Filter icon located on the right side of a Column Heading
2. Select the item to use to filter in the menu
   a. The filter icon will turn blue after the filter occurs
   b. Select ALL to return all items to Grid

Use Client(s) on CSBG pages

1. Click on Client record in CUSTOMER LISTING GRID
   a. Make sure entire row is highlighted
2. Click on CSBG section page
3. If a list of Clients is displayed on this page, use the Customer dropdown to change Clients or use the toolbar arrows on the CSBG pages to scroll through the list of Clients on that page 

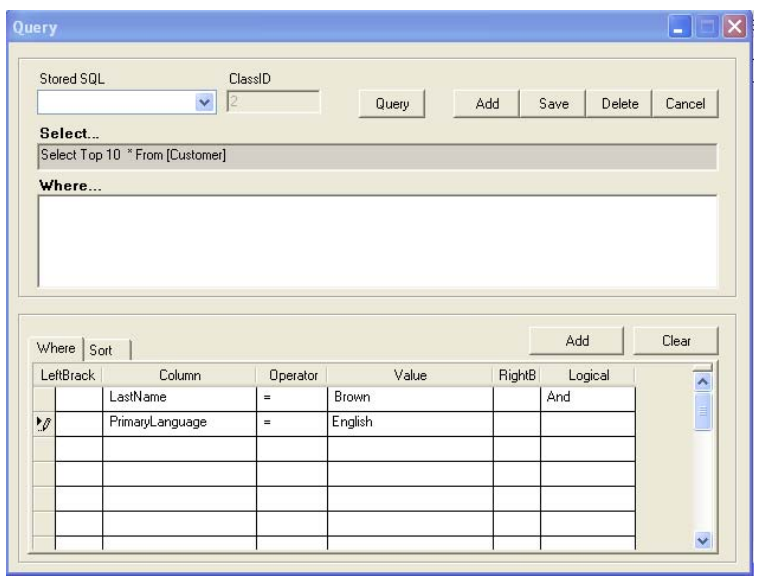
Search by other Criteria



1 Right Click
2 Select FIND
3 In the Dialog box, select or enter:
4 **Field Name** = criteria available to be searched
5 **Operator** = how to match
  a **=** Equal to, will match exactly
  b **!=** Not Equal to, will not match
  c **>** Greater than
  d **<** Less than
  e **>=** Greater than or equal to
  f **<=** Less than or equal to
  g **Like** uses **%** as a wildcard character, so entering M% matches Mike, Michael, MMM; it is not case sensitive so M%T% is the same as m%t%, both will match maaaaaTxx
  h **Not Like** is the reverse of Like
  i **Between** and **Not Between** is useful for ranges of birth dates
  j **Is Null** lists all records with no entry for that field
  k **Is Not Null** lists all records that do have an entry for that field
6 **Value** = what to match
  a Enter the text to match the parameter chosen for the Field Name
7 Click SEARCH

Found Clients will appear in CLIENT LISTING GRID

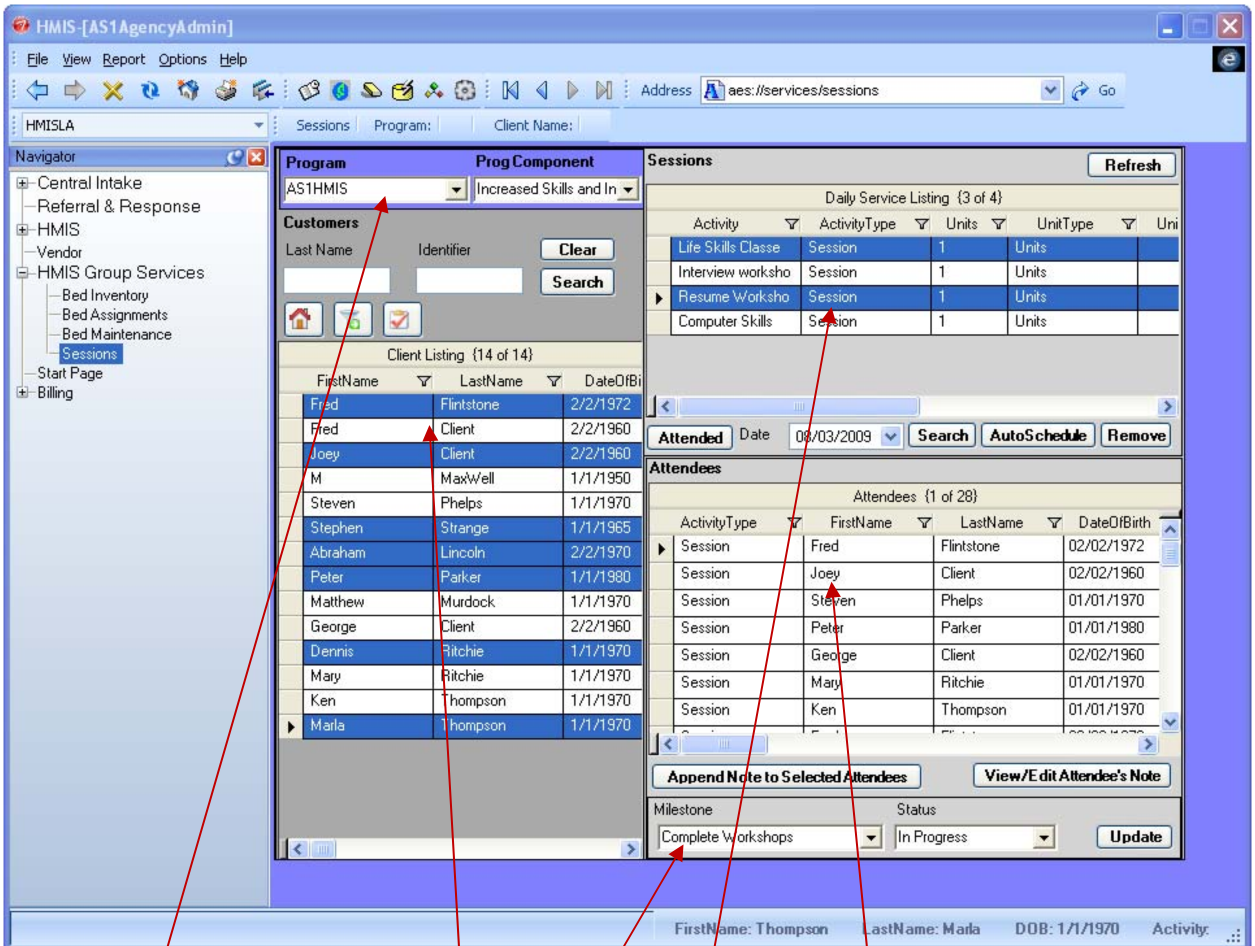
Search by more than one Criteria



1 Right Click
2 Select QUERY
3 In the popup window:
4 Select the WHERE tab
5 Left Bracket = leave blank
6 Column = 1st parameter to search in the dropdown (i.e. last name, race, gender)
7 Operator = how to match (*see descriptions in Search by other Criteria*)
8 Value = what to match (i.e. Mary)
9 Right Bracket = leave blank
10 To add another parameter, select AND or OR in Logical column
  a AND = Client must match ALL criteria
  b OR = Client must match ANY one or more of the criteria
11 Add additional Criteria if needed
12 Click ADD button when finished
  a Use CLEAR to remove criteria
13 To add a Sort parameter:
  a Click SORT tab
  b Select the parameter to sort by in the dropdown
  c Click the >> button (<< removes a parameter)
  d Click ADD
14 Click QUERY to begin the search

Group Services – Sessions Page

Sessions is another group activity page where multiple clients can be assigned to a particular service that was set up as a Session. Examples include classes and workshops offered to clients (i.e. anger management, debt reduction, after-school, etc.).



Navigating the Sessions Page

- Program and Program Component selection determines Clients and Services displayed on page
- All available Clients will be displayed in <u>CLIENT LISTING GRID</u>
- All available Daily Services will be displayed in <u>SERVICES GRID</u>
- All Clients receiving selected Service on selected date will be displayed in <u>ATTENDEES GRID</u>
- Milestones will be available in dropdown

Find Available Clients and Services

1 Select Program
1 Select Program Component

Clients entered in the Program appear in Client Listing Grid and available Daily Services appear in Session Listing Grid

> ➤ *Sessions are a way to record the same service for a number of Clients at one time*
>
> ➤ *A Session is usually a workshop ors some type of service delivered to a group of Clients at one time*

Other Ways to find Clients

1 To find a Client by Last name
  a Enter Name in Last Name Field
  b Click FILTER button at top
2 To view all Client of current Case Worker
  a Click SHRINK CUSTOMER LIST FOR CURRENT CASE WORKER button 
3 To view all members of a household
  a Click SHRINK LIST TO CURRENT HOUSEHOLD MEMBERS button 
4 To view all Clients again
  a Click REFRESH button

Record Session Activity for Client(s)

1 Select Client(s) in Client Listing Grid
  a To select more than one Client, press CTRL while clicking on each row
  b To select a list of clients, click on first row, press SHIFT while clicking on last name in list
  c Click on first record and drag cursor to last record
2 Select Service in Sessions Listing Grid
3 Select Date of Service
4 Click ATTENDED button

Client(s) appear in Attendees Grid

Link Activity to Milestone and change Milestone Status

1 Select Client(s) in Attendees Grid
1 Select Milestone in dropdown at bottom of page
2 If Status of Milestone is changing, select Status in dropdown
  a Status does not need to be selected unless it is being changed
3 Click UPDATE button

Activity and Milestone Status will appear on the Program Services page for this Client. Activity will appear on Service Reports whether or not it is linked to a Milestone.

> ➤ *The Session Services will be displayed on the Client's Services Provided page if they are linked to a Milestone on this page*
>
> ➤ *If they are not linked to a Milestone, they will still appear on Service Reports*

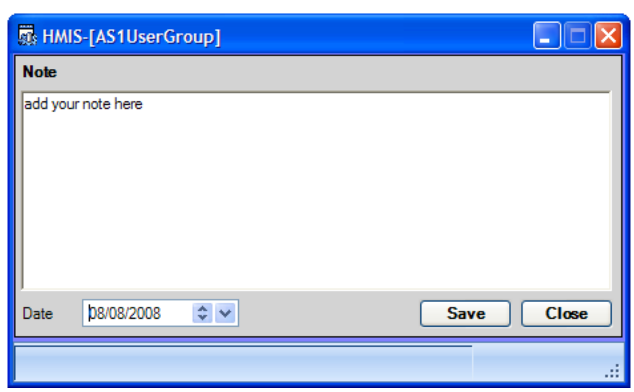
Add a Note to a Client record

1 Select Client(s) in Attendees Grid
2 Click APPEND NOTE TO SELECTED ATENDEES button

In popup window –

3 Enter text of note
4 Select Date
5 Click SAVE
6 Select Session Activity in Sessions Listing Grid

Note will appear on Client's Case Notes page.
To edit note, use VIEW/EDIT ATTENDEE'S NOTE button.



View all Clients receiving Session Activity on one Date

1 Select Session Activity in SESSIONS LISTING GRID
2 Select Date in middle section
3 Click FILTER button

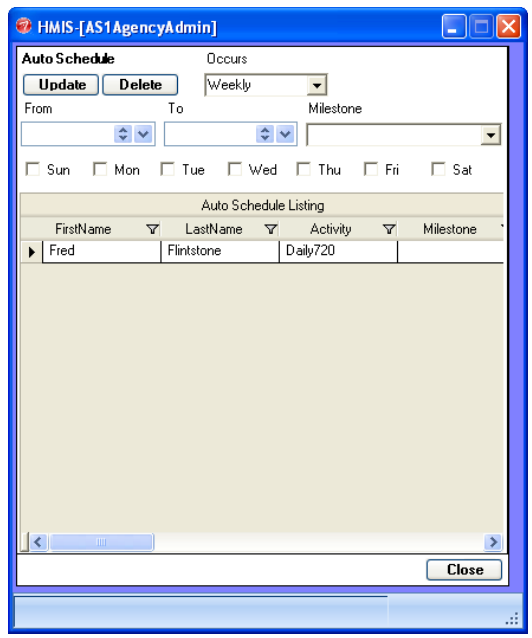
ATTENDEES GRID will show all Clients receiving service on that date

Remove a Session Activity

1 Select Session Activity in SESSION LISTING GRID
2 Select Date in middle section
3 Select Client in ATTENDEES GRID
4 Click REMOVE button
5 In popup, answer YES

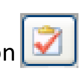
Note Session Activity Services cannot be removed from a date in the past, only from the future

Plan Multiple Session Services



1 Select Client(s) and Session Activity
2 Click AUTO SCHEDULE button to open popup
3 In the popup, select Client row(s)
4 Select how often Activity occurs
   a **Daily** creates records for each day of the range
   b **Weekly** creates records for the days selected within the range
   c **Monthly** creates records using the valid from date as its base within each month of the range
5 Select FROM and TO dates
   a Dates must be future dates, not past dates
6 Select Milestone to connect Activity to
   a This defaults to the first Milestone
7 Click to create checkmarks in correct days of week checkboxes if using Weekly
8 Click UPDATE button
9 Click CLOSE button when finished

Jump to Program Entry page

1 Select Client in CLIENT LISTING GRID
2 Click JUMP TO PROGRAM ENTRY button 

Program Entry page will open with the Client active