



Case Management Frequently Ask Questions (FAQs)

Case Management FAQs

Client Inquiry

What information is required to start a client inquiry?

Enter any, or all, of the following: client name (first, last), DOB, SS#, phone number (work or cell), and address. The more search parameters you enter....your chances of locating the client are increased and you will receive fewer clients to choose from.

Do I need to continue to click “Next” until all of the search parameters I entered have been displayed?

NO. Once you have found the client or household member you are looking for, click on it in the search results grid and proceed forward.

In the search results grid, how do I distinguish between a client and household member?

Clients appear in the results grid in **white** and household member are in **gray**. The most likely candidate (client or household member) that matches your search criteria will appear at the top of this list.

On the “Review Client Match” screen, which tab should I select?

Always select the “Current Match” tab for an existing client. If you select “intake profile”, thinking you entered the most current information, CMS will populate the client profile screen with the current information in the database and ignore what you inputted. This is the reason why you don’t enter ALL the client’s information when you start the client inquiry process and select “intake profile”.

Why when I select a “Past Assistance” the case detail is not displayed?

To view a client’s case details (i.e. situation, caseworker, etc.), you need to wait until you have clicked “Select” on the “current match screen” and have advanced to the “open case review” tab.

How do I create a case for a household member under the head of household record?

Click “Switch to Head of Household” button. You will now see that the household member is listed as “member” and the head of household is the “client”. Click “Continue”.

What happens when I click the “Cancel” button?

The inquiry is deleted from your “My Assigned Cases” folder.

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Case Intake

When should I update/enter the client's information in the client profile?

Once you have advanced to the "Household" tab, tab backwards to the "Client Profile" tab and make your changes and/or additions to the client profile. Do not forget to click the "Save" button.

How do I pass a "message" onto the caseworker?

In the "Request Details" tab>Comment section, you can enter as much text as you want just by clicking on each row to start a new line. The caseworker will have visibility to what you entered by clicking the "Request Details" accordion.

What happens when I click the "Cancel" button?

The case is deleted from your "My Assigned Cases" folder.

Casework

Why doesn't the person I want to select as a secondary appear in the secondary drop down box?

Any person (ride along, Caseworker, etc.) you would like to be a secondary must be assigned a "Conference Member" role. Once assigned this role, they will appear in the secondary list. To avoid any future problems, we recommend that all members be assigned a "Conference Member" role.

Why doesn't the secondary I assigned to the case appear in the "Visits" tab?

You must click the "Refresh" button, on the visits tab, for the secondary to appear in the grid.

At what point, in the casework workflow process, can I delete a case?

For a new client you can delete a case any time **prior** to clicking the "Create Client" button by clicking the "Cancel" button. After that point you will only be able to close the case with no assistance by clicking the "Close Case" button which is the same procedure for existing clients.

When is a new client added to the system?

When the Caseworker clicks the "Create Client" button on the client tab. Prior to this event, you will not be able to locate the client via the search>clients or case intake functions.

When does the case status change from "Assigned" to "Open"?

When you have advanced to the "Situation" tab. Prior to this point, the case can only be located/searched with a status of "Assigned".

When and how do I reopen a case?

This is typically a judgement call. Our advice is that you should only reopen a case when the client's situation has not changed and it has been a short time (1-3 months) since you closed the case. To reopen a case, go to search>cases and enter the case number. Click on the client in the search results grid; then click the "Reopen" button.

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Express Assistance

What are the 2 types of Express Assistance?

In-Case Express Assistance and Non-Case Express Assistance. For more detail information about Express Assistance, refer to the Treasury User Guide; Appendix B; Pages 88-89.

What are the differences between In-Case Express Assistance and Non-Case Express Assistance?

The In-Case Express Assistance feature is available, via the “Express” button, when you have advanced to the “Household” tab. With In-Case, an in-kind transaction will be created and be available when viewing past assistance. Non-Case Express Assistance is available as an option off the main menu and unlike In-Case, a transaction is NOT created as part of a case and therefore not viewable in past assistance. It is a quick way to enter in-kind transactions and updates the annual report totals.

Why doesn't the Express Assistance option appear in my main menu?

To see this option on your main menu, you MUST be assigned an “Express Assistance Provider” role. To setup this role, see your Conference Administrator.

How do I generate an Express Assistance Report?

You must be assigned an “Express Assistance Manager” role. Once you are setup with this role by your Conference Administrator, you will see “Prepare In Kind Eligibility Report” option on your main menu.

Search

Why can't I find an existing client using search>clients option?

You should **NOT** use this option to vet/qualify clients for assistance. You should only use the client inquiry process to find existing clients and household members. The search>clients search engine is not a very robust search engine; therefore the results are unpredictable and maybe incorrect.

How can I do a partial or exact match search on name and address?

Use % (wildcard) and (“) for exact match searches. For example:

If you are sure of the client name (first and/or last name) spelling, then put the name in quotes (“) and you will disable the phonetic search default and just find this client. For example: “Sue” “Jones” would only find the name Sue Jones

If you think you know the client name but are not sure if it's Susie or Sue Jones, enter a % sign (wildcard) after the name. For example: Sue% Jone% would get all clients with a name that contains Sue and Jone.

If you are not sure of the name spelling at all, just enter Sue Jones and you will get all names that sound like (the system default is a phonetic search) Sue Jones.

Note*** You can use % (wildcard search) and (“) exact match search in the address field as well.

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Search (Continued)

How can I update a client's information without creating a case?

Select Search>Clients. Enter search criteria to locate the client. Once located, you can then update the client information on the profile, household, and employment tabs. Click the "Save" button.

How do I get access to the Cases by Casework search option?

You must set your "Current Conference" before this option is displayed in your search option list. Select My Profile>select your conference from drop down box>click "Set Current Conference" button.

Conference Administration

Why is our MFR and/or Annual Report missing conference information?

As a Conference Administration, It is your responsibility to keep this information current. Go to the task pane and click "My Conference". On the Conference tab, complete all the missing information for your conference. There is also an optional area at the bottom of the conference page where you can enter the type of services provided by your conference. Then click the "Configuration" tab and complete the conference information in the middle of page (i.e. meeting frequency, spiritual advisor, 501 (c) 3)

How do we share our meeting minutes with our conference members?

First, you must upload the meeting minutes to CMS. Go to the task pane and click "My Conference". Then click the Documentation tab>Meeting Minutes. Follow the directions to upload you minutes. They must be in PDF format. To access the meeting minutes, click on the big blue "Documents" button on the top of the screen; then click "Meeting Minutes". ***Note-A member with a "Conference Member" role **ONLY** will not be able to access CMS; therefore not be able to view the meeting minutes in CMS.

How do I reset a user's password?

Go to Search>Contact Information, find your user and click the Change Password button. Make the new password his/hers first initial + last name, reenter the new password and click the Submit button. Notify user than you have reset their password and made it the same as their Username.