



Frequently Asked Questions

Overview

There are many questions that come our way through the various training sessions, in demos, or in person when talking to users. We've tried to answer a lot of them in training or in the User Guide itself, but there are some that require longer or more example heavy answers.

Search. How exactly does it work?

There are 2 different kinds of 'search' in the system. Search that's spawned along the top that we will commonly refer to as 'topline search' and search that's a part of the workflow - such as the inquiry process in intake.

Search along the top is not intended to support workflow - as such it DOES support things like wildcards. The 2 wildcards supported are the % and the _. The % is an 'anything and everything to the side with the symbol is ok' wildcard so "Jon%" will get Jonathan and Jonah and Jon etc... The underscore character _ is used for a single 'anything' character - so "Sara_" will get you Sara and Sarah etc. Another thing to consider when it comes to topline search - every data element that is added in the search mask is another logically required element. For example, if you just put 'john' in for first name you'll get a lot of johns... if you put john and a phone number it will only show you people named John with that phone number (even if that number is in the system but not listed as belonging to John).

Vincenian Case Management System Home My Profile Search Documents User Guide Logout Logged in: Blaise Baxter Build 269

EXIT VIEW PANE

Clients Back Help Clear Search

Red Flagged Only

First Name MI Last Name

Phone DOB SSN

Gender Veteran Status Email

Address

City State Zip County

1-2 More...

Status	Last	First	DOB	Phone	Gender	Marital	Zip	Address
Active	johnson	john	08/01/1960		Male	Married	30000	528 Brown St
Active	Johnson	Jonah	01/08/1967		Male	Single	30000	1200 Gelpi

Another aspect of search that's supported in the system is 'Soundex'

Soundex is a mathematical measure of the 'sound' of a word. We're not interested in how someone might spell Gonzales - the system sees it and knows that there are a dozen valid ways to spell it. It will generally weigh 'exact' matches as higher value than non-exact

ones - but it will still give you 'things that are close' long before things that don't sound like Gonzales at all. Soundex is a very inexact science - where 'John' and 'Jane' may sound very different to you they sound very similar to the computer - so you will commonly get 'sound alike' matches that may seem like a bit of a stretch.

The Inquiry process which commonly happens during client intake is a wizard-directed search rather than the parametric function in topline. In intake, the intake worker enters a number of data points into the client profile. Ideally they're entering everything they have at that point - but we know from experience that in practice intake workers tend to enter only a name, a DoB, a Phone, and maybe an SSN - then go back and enter more data if the system doesn't find someone. The inquiry process can only be as accurate as intake workers are diligent - so if intake cuts corners and opts not to enter available information in the client profile then it may end up creating more work for someone down the line on failed matches.

During Inquiry, what the system does is it take all the pieces of data you've given it - and it uses them. If you give it a name and an address and a phone number - it's going to try a couple searches - it's going to try a search with some reasonably unique value - phone number or email, it's going to try an address search with just the address, and it's going to try a couple searches on Date of Birth and SSN - but with the filter of the First Name, and finally it's going to try a Soundex search just using the last name - but weighing what might be a large result set by any other possible matching criteria to put the best guess at the top of the list.

Let's say you do not have a phone number, but the address you've supplied is an apartment complex where, over the years, you've had a number of clients. The system is going to return a lot of address matches... but it's going to use all that other information to push what it considers the best matches to the top of the list. It may be the name... it may be a date of birth match... it may be SSN... So it could be that you supply an address with a date of birth and a name - and the system goes in, sees the address, has 20 or 30 client records to show you - but wants to put someone with a completely different name at the top - because they share the address and the date of birth. The way we've accomplished this is we've applied a 'weight' to every type of information - with things that have highly 'unique' value like a phone number with heavier weights... so you'll see these towards the top of the list.

In reality, people's names change a lot. Whether they get married, or they move into someone else's apartment and now they're applying for help under that person's name, or perhaps the name has never changed but it was misspelled initially or a nickname was used. The combination of other factors are very helpful in finding those you serve in the system.

The complexity of reality when trying to properly identify those you serve means a single parametric search is not always the best result - so this simple wizard which, theoretically, identifies matching individuals quickly - is the best answer.

You use Adobe Flash for the client side control for CMS. Now that Flash has been given an end of life date of 2020 and will be phased out of popular browsers in 2019, how do you plan to handle this transition?

We've been using Flash as a connector for several years in our application framework and have been very happy with the functionality it has provided but we also recognize the security concerns it presented given the way it has been used by others. We currently have a version of CMS running as an Adobe AIR application that we use internally in test. There are some components of our Expert Server suite that will not work inside an AIR environment, but none of those are being used by the Vincentian CMS application.

It is our intent to further test this application internally and then provide it as an optional method of connecting and using CMS in the early part of 2018 - making it a mandatory option sometime next year.

The download version actually provides us with opportunities to increase the security of the product - and there are other advantages when it comes to mobile computing as well. We also plan to implement an HTML5 version of the Angular Expert Server client in 2018 - which would allow users to go back to using browsers if they so choose.

We need a better understanding of Red Flags. How is that supposed to work?

Red flagging people in the system has always been a 'soft warning' rather than a programmatic hard stop. The general rule of the CMS system is that humans should be in positions to make determinations on whether someone should get assistance. Whether it is red flagging or other eligibility tests these are left up to Vincentian individual discretion to determine and enforce.

Red Flags are a method for Vincentians within the diocese to alert the conference about individuals who might not be the best choices when it comes to using your limited conference resources. Neighbors who have come in aggressively demanding assistance or who might cause people to feel unsafe on a home visit etc can be tagged with a 'red flag' that can serve as a caution to anyone else who might encounter them.

There's a very broad degree of interpretation when it comes to 'feeling unsafe' or a sense of 'potential fraud' - so there is a 'review' process that is invoked whenever a red flag is applied to a client record - but from the moment one Vincentian says 'this person should be redflagged' they are flagged. When this happens - anyone in the entire diocese who has the role 'red flag auditor' has the ability to review the newly tagged account, read the recorded experience of the Vincentian, and make a determination as to whether the red flag should stick.

These red flag auditors conducting these reviews should be mindful that Vincentians who have gone to the trouble of redflagging someone feel it's important to communicate their concerns to other Vincentians. This is also true for intake/caseworkers who come across these warnings. The notes associated with a redflag should always be read and considered before a determination of whether to continue the intake/casework processes should continue.

The Address warning redflag is slightly different. These warnings can occur when a physical address has been singled out due to serious problems. The issue at the location can vary from landlords who make an effort to scam Vincentians to dangerous areas that might make home visitors uncomfortable. If a local landlord has told new residents 'call SVdP for your first month free' this is something your conference shouldn't be responsible for.

How do I use Join.me

Join.me is the screen sharing web conferencing software we use to conduct training and sales demos. Anyone with a web browser can simply go to the site by typing <http://join.me> into their browser, click on the big green 'join meeting' button, type in our demo code (supplied by email prior to the session), and join in. This will show you our screen - where we'll walk you through how the software can be used in various ways.

When you initially log in, it will give you a phone number to call if you wish to use a phone (or you can dial the number we also provide by email) - or you can use your computer's speaker and microphone (though we don't necessarily recommend that).

You don't necessarily need to gather in one place to have these sessions - you can log in from your homes or any place you're comfortable. We do ask you mute your phones if you're not speaking - sometimes we'll get echoes or background noise which can make it difficult for others to hear. Also - if you do gather in a room to watch one of our presentations in a group - we do suggest that using speaker phones to try to communicate questions during these sessions is not recommended. Having the speaker phone set to 'mute' and a 2nd phone in the room passed around and used to ask questions tends to be the best solution.

Does CMS integrate with Quickbooks/Wave/Peachtree?

The short answer is no. The idea behind CMS is to focus clearly on helping to manage the casework. The tracking of the financials is recorded as a ledger to reflect the actions of the conferences. For example, many larger conferences have multiple accounts with multiple banks used for different purposes. In a sense - this is a 'reporting' system. It prods a treasurer to action when casework has advanced the ball - and the treasurer would then cut the check appropriately - but they would have to enter the check in both a quickbooks register and in the assistance request approval process in our system.

Typically, conferences isolate data into separate systems and physical recording routines. Treasury and accounting software solutions are readily available and convenient to use so they are the first business automation "silo" to be implemented. However, popular accounting systems lack the specificity to provide sufficient reporting detail prescribed by national and local charter authorities at the Society.

CMS's treasury features map a standardized assistance catalog to specific Vincentian financial line items so that detailed monthly, periodic and annual reports can be produced. There exist over 80 assistance items mapped to 18 direct aid transaction that are disclosed within the standard CMS treasury reports. This mapping is essential to automatically compile the detailed reporting format prescribed by the charter authorities. Without these essential

Vincentian associations between assistance items and financial transaction types, the presentation of management information is extremely limited and requires a good deal of preparation work on the part of treasurers.

Conferences with existing accounting system can't associate the case data and assistance type that is essential for Vincentian reporting and getting a more granular picture of assistance efforts that are necessary for federal program integration and philanthropic granting authorities.

CMS is a Continuity of Care platform for the case of the friends who call looking for help. It tracks financial efforts directly to those in need in a way that helps manage the systemic change necessary in people's lives to help provide real and dramatic improvements in their situations. This simply can't be done with quickbooks.

Additionally - a treasurer could configure online accounting applications in any number of ways that would be different from the way our system would attempt to export data. Every quickbooks user is different and they might tag debits with completely customized coding that would be impossible for us to integrate.

Another reason we have not pursued financial application integration is the nature of CMS as a simple 'reflection' of the conference books and treasurer's activities. Given the number of intake workers and caseworkers who would be able to touch data that could end up in a quickbooks data integration - the potential mischief associated with being able to do something that could actually affect your actual bookkeeping - or could connect to an actual bank account - is too great. Someone logging into our system and changing a lot of data is something we'd simply back out - but it wouldn't *do* anything other than mess up some client data for a short time (and annoy a lot of people).

Quickbooks et al are great for actual bank integration, for check printing, and for handling all the complexities of employment and thrift store operations - but they're simply not designed for Vincentian assistance tracking. If your conference uses a one of these stand alone systems - they're great as the authoritative source for managing the conference check register, deposit accounts and monthly and annual financial statements - but to use CMS properly you'll have to take a little time as a treasurer to use CMS to duplicate some of the efforts of recording check numbers, dates, and amounts related to your conference operation.

We have multiple bank accounts for our conference. Does CMS support this?

No. Commonly conferences use a single account for conference operations. They might have a second account set aside for a thrift store etc - but generally there is only one account from which assistance is provided (and that is the important thing we're trying to track with CMS - tying the direct assistance efforts directly to a history).

The SVdP USA treasury guide suggests the best practice for a conference is the use of a single account. The problem for us with trying to accommodate multiple bank accounts and 'roll up' a balance is in trying to accurately display and track the additional balances. Having treasurers have to choose from multiple accounts for varying credits and debits and having conference

balances accrue into single line items that did not have a corresponding 'match' with a single unique banking authority would be troublesome any time there might be an error.

If a conference wishes to have multiple accounts for the purpose of handling thrift store operations that works for many conferences. The treasurer simply augments the quarterly report with the additional SVdP USA mandated 'thrift store operation' report, slotting the profit and loss items into the appropriate lines and altering the report accordingly (the system as it stands is currently designed only to handle the 'net' deposit of money from thrift store operations intended to be used by the conference, so supplying a 'gross' item with a corresponding 'thrift store expenses' item should net out to the same bottom line).

How do I add custom documentation to my conference that will appear when I hit the 'Documents' button at the top?

Each conference has their own 'Custom Documents Folder' and conference leadership have the ability to upload files here. These documents will only be available to that single conference.

How do I just print a blank Case Record Form?

A completely blank case record form template can be found at <http://www.agularsystems.com/AgularCMS.htm>. Conferences are encouraged to use the 'Custom Documents Folder' detailed above to host blank Case Record Forms if so desired.

Is there a spreadsheet somewhere where I can see what treasury resources end up on which annual report line items?

There's a 3 page chart within the treasury section of the User Guide and that covers all these standard treasury transaction elements.

What about the various in-kind options for our conference?

That's a slightly different question as different diocese have the ability to supplement the standard set of in-kind options. We can provide a map of these elements including those unique to your diocese to treasurers if necessary on request (but it honestly doesn't come up very often).

I'm getting a form validation error when i try to hit 'Next' in casework. What's going on?

What has most likely happened here is you have 'tab hopped' back to a prior tab to alter or enter data. Many times people use tab hopping to quickly skip back across the workflow to quickly make a minor addition or adjustment to information that otherwise wont alter the case's flow. If it will alter the flow, for example if you were to hop all the way back to the client validation phase in intake, it would rewind a lot of workflow to that point (this shouldn't really happen). But if you have simply tapped on a tab to make a change to something and then are hitting 'next' - the 'next' and 'previous' are tied to the actual 'last place in the workflow' - which means that even though you might be looking at the household

screen, you might be much further along in the process - and hitting 'next' is suggesting to the system you want to advance the workflow itself. If there aren't any required fields on that last screen? no problem - it'll take you all the way forward to the next step - but if there were required fields then the system is going to complain that you haven't filled them in. So - when you use tab hopping to move backwards to enter something - you should remember that the system is really still very much focused on you being further along in the process. If you tab hop back to the last lit tab in the row - you'll likely see the required field boxes which are the cause of the form validation error CMS is complaining about.

Someone just called in a second time after I've already completed intake on a case. How do I record new or change information in that case I've already sent forward to the caseworkers?

If this happens to an intake worker working the phones they can bring up the case via topline search (or respond to the open case conflict if that is how this is discovered) and attach a message for the caseworker. During the intake process, intake workers have access to an accordion section allowing them to enter longer detailed information as 'case instructions' as well (but lose the ability to enter this once the case is submitted for distribution).

As a small aside, caseworkers can record interactions with a client in 2 different notational note fields prior to a home visit - the 'scheduling notes' field and the 'case instructions' field - so depending on the type of interaction one has the caseworker can record any important information in the appropriate location. These should all be reviewed by caseworkers both before assignment and prior to performing the visit.

What is a 'Profile Only' search result?

If you're searching for people in the system - whether as a result of a new intake or using search - you may come across 'profile only' results. These are individuals who have asked for assistance but never received a home visit. Someone at some point in the past has captured some degree of information and forwarded this information off as casework to be worked. At that moment in time, the data collected during intake is somewhat questionable as many times no one has actually met with this person to verify that this is accurate. Only after they have met with a caseworker who has had a chance to review the person they've met with does a client record get created.

Say for example, someone calls in saying they're 'John Smith' and live at 130 Elm. First off, the name might be spelled Jon etc. - and during the process of the home visit it's also very possible that enough information will be collected that, upon returning to their computers, the caseworker discovers that this Jon Smith is actually already in the system but had lived across town when he last got help. The reality is that this happens often enough that it's better to have this degree of double checking the data during that initial 'not quite real in the system yet' phase.

These 'profile only' records are eliminated if caseworkers cancel the requests - so they should not be seen routinely.

How do i add vendors to the drop-downs?

This list is managed by diocese leadership and perform the function with the Diocese ToC entry and Manage -> Vendors option.

Generally the list of diocese vendors is somewhat limited in nature. If every apartment complex in a diocese were entered in as a possible rent payee the effort of finding the right one amidst the potentially absurdly long list is beyond troublesome. For that reason we strongly suggest diocese keep these vendor lists small.

If I want to leave the Agular CMS platform how hard will it be to retrieve my data?

We'll work with you to come up with a reasonable export of client data similar to the sort of data we generally import.

My food pantry purchased food. How do I record that as direct assistance instead of in-kind?

This is a question asked by the most attentive treasurers. Vincentian conferences are always doing their best with the limited resources they have - and are always on the hunt for ways to increase funding or find resources that help them help those in need in their communities. As such, there will commonly be some sort of food collection effort going on. The food in conference pantries that goes out as bags of food has a value -- but realistically, what is the 'accurate' estimate of how much a bag of food really is. Beyond this - conferences will commonly spend money with local food banks to fill their pantries (often at a discount). The problem comes in when the caseworker who brings the 2 bags of food to the door when they perform the home visit sets a value of \$50 each on those bags - because those are going to end up being tracked as 'in-kind'. The theory is that much of the food that's distributed, or the clothing vouchers etc - all represent things that are donated to SVdP, not things the conference spends actual funds to purchase - and obviously that is not 100% true.

There is no realistic way to get a guaranteed accurate estimate of what food within a particular \$50 bag of food was purchased vs donated. When your conference makes a purchase of food it is commonly going to be entered into the register as a direct aid item tagged to the 'food' resource (in this case showing up on line 6e of the appendix of the financial reports).

What you could do to improve the accuracy of the in-kind value estimates would be to subtract the amount of food purchases that are showing up on 6e from the in-kind food value (line J). Line J is simply calculated as a tally of the value of the in-kind food assistance events.

Of course, this sort of solution runs the risk of pushing things the other direction -- as your pantry may well have an inventory value of food and that then wouldn't be reflected until it was distributed. Realistically - making this sort of adjustment makes sense only if you're trying to be extremely accurate and really only with an eye to the annual report span.

Our auditors insist we keep scans of images of bills. How do we do that?

The CMS system has an optional 'Attachments' tab that can be enabled for a diocese to use. Though CMS is capable of using TWAIN scanner drivers to connect to scanning equipment, the reality of Vincentian conferences is that you don't have scanners. Instead what we provide is the ability to 'upload' a file.

We have to assume people who are looking to upload images will 'find a way' to get that picture taken - most likely with smart-phones - and then get the image from the phone/camera to the computer where they access CMS.

For phones, we recommend using something like the free android CamScanner application - something that will take a picture, make it black and white, increase the contrast, and save it as a small file. There is some worry that Vincentians will take *really* big pictures with their smart-phones and end up with data usage fees if they try emailing them to themselves etc... so trying to 'pre-process' to a small size at the front with an application like this is a really good idea. Regardless of whether you send us a 50mb full color file or not, our system will take the uploaded image and process it for storage on our system (converting to black and white, shrinking etc).

These files are ONLY available to caseworkers so long as the case is open. Once a case is closed - they are no longer available (as there should not be a need). They will remain available for diocese level accounts for short periods after this expressly for the purpose of accommodating auditors - but there they too will be purged from the system automatically. Scanned images of bills are valuable as proof of need, but are not necessary once the individual has been helped and we must respect the privacy needs of the individual.

It is strongly recommended that important identifying documents not be imaged. Taking pictures of drivers licenses etc can result in legal issues that are much worse in some states.

These Demographics numbers in the Financial Report Appendix don't look right. Can someone tell me why they look wrong?

This Demographics table will ONLY show data from cases that have the status "Closed - Assistance Provided".

For Direct Aid assistance, transaction date defines the period.

For In-Kind assistance, visit date defines the period

Unique headcount (unduplicated) is not represented in this table as the calculation will multiply the headcount of the household by each individual assistance event within the case.

For example, a family of four (4) who have a home visit on June 1st and three (3) assistance events : Food \$100 + Clothing \$50 + Utility Bill \$150 (direct aid) could be counted as $4 \times 3 = 12$ people in Client Demographics. However, this is dependent on the prior logic. If the payment transaction date recorded by the treasurer was in the June period and the case is closed within the same June period then the assistance events will be calculated and published within the June monthly report.. However, if the case is not closed by the time the treasurer closes the month, the published financial report number will not reflect the (3) assistance events .

Also, if the case was closed in June but the home visit happened in May then the in-kind assistance would not be counted here either - and only the direct aid.

In this scenario, the In-Kind assistance of Food \$100 and Clothing \$50 would have been reported in the May periodic report (In-Kind assistance, visit date defines the period). The June monthly financial report would capture the Direct Aid assistance of Utilities \$150 (Direct Aid assistance, transaction date defines the period) because the payment was recorded in June.

We have added some additional documentation to the User Guide to further detail the appendix tables and will be revisiting the logic of this table after the 3.0 release as it has caused quite a bit of confusion over the years.

I've added a role to someone's account but it doesn't seem to have affected them. They cant see the things they're supposed to see.

Have them log in again.

How do I add centralized intake to my conference?

Centralized Intake is a feature that is considered to be a Diocese-Level set of roles and behavior. If the diocese wishes to enable it, the diocese administrator can simply assign the appropriate roles to individuals and the process is instantly enabled.