Society of St. Vincent de Paul

Galveston-Houston Archdiocese

CMS User's Guide

There are two sections that most of us will use with the Society of St. Vincent de Paul Case Management System (CMS): INTAKE PROCESS and CASE WORKER

INTAKE PROCESS is where basic information is entered about the Client/SVdP Friend and their request for assistance. The intake is mostly done by those Vincentians who have volunteered to retrieve the Charity Line calls and who contact the SVdP Friends to gather the initial information. This additional information from the telephone discussion is used to complete the CMS intake process.

CASE WORKER is the process within CMS where information is entered about the Friend's situation following a Home Visit, together with entry into CMS of Pledges, Check Requests, Gift Cards, Referrals, Furniture Requests and other assistance that may have been provided.

INTAKE PROCESS

Only the fields with the red asterisk (*) need be completed during intake. Other fields may be completed if you know the information. Otherwise, skip the other fields.

1. Click **HOME** on the top line of tabs.

2. In the bottom box Main Menu, Options, select **Case Intake**

3. **Client Profile** appears, click in the **First Name** box and enter the Friends first name.

4. Click on or tab to **Last Name** and enter.

5. Select **Gender** and, if known from the initial telephone contact with the Friend, **Marital Status** and **Ethnicity** from the drop down boxes. If marital status or ethnicity is not known, this information can be provided later by the Case Worker after the home visit.

6. **Date of Birth (DOB).** While not required, it is very helpful to enter the Friend's date of birth, since this will help us identify the Friend's "Client Record" and case history in the future. It will also help determine if the Friend has previously received assistance.

7. **Spanish, Homeless and Veteran** boxes- check box only if you know that the answer is Yes.

8**. Other Aid** - if known, check the boxes that are applicable. Otherwise, skip.

9. **Phone** - enter the Friend's telephone number. This is another important identifier for past or future case history, since Friends often maintain the same telephone number even if changing their place of residence.

10. **Email** – enter the Friends email address if one is given to you. This will help us communicate with the Friend if you are unable to contact him or her by telephone.

11. **Address** - in the first address line, enter the street address and in parentheses put the name of the Apartment Complex where the friend lives (which may be different from the leasing office). In the second Address line, put the name of the Apartment Number. Also enter where indicated the City, State and Zip (it is optional if you want to enter the County or the number of years living at that address).

12. Click **NEXT>>** at top right. This will take you through several **Client Identification** pages that will try to match the name, address and telephone number. If there is an exact match, it will appear at the top of the list.

- If there is a match, click on the name, which will take you to a **Review Client Match** page. At the bottom of the page, click on the word **Past Assistance,** which will show you the past assistance provided.
  - If the Friend was recently helped and the decision is made not to provide additional assistance, click **Cancel** at the top left hand side of the page, which will delete all of the information that was entered during intake. The intake volunteer can then advise the Friend that he or she is not eligible and when they will next be eligible for assistance.
  - If assistance was not previously provided or a decision is made to provide additional help to a Friend who was previously helped, click on both the Current Match and the Intake Profile tabs to determine which information is most up-to-date and then choose **Select** at the top right of the page for the most current information.
- If there is no match to the intake name, address or telephone number, click **NEXT>>** on each of the Client Identification pages until you get to the **Open Case File** tab.

13. **NEXT>>** at top right to get to the **Household** tab.

14. In **Household** enter **First Name**, **Last Name, Gender and Relationship** (and **Ethnicity** if you know it) of others living in the same household. If you don't know this information, click on **NEXT>>** at top right and the Caseworker can complete the information after the Home Visit.

15. **NEXT>>** at top right to proceed to the **Request Details** tab.

16. **Request Details**: change the Date of Request if necessary to reflect the date you spoke with the Friend. Click on the drop-down arrow under **Category** and select the type of assistance being requested (i.e Rent, Utilities, Food, etc). In the **Comment** field, <u>put your initials</u> and a hyphen or colon and a description of the assistance requested, <u>beginning with the dollar amount of the requested assistance.</u> Your initials help identify who did the Case intake. Also, keep your comments short, since the Comments section is limited to 210 characters (approximately 40 words) and the section for the Comments on the Case Record Form is 70 characters (approximately 16 words). As noted below, you can put longer comments in the Case Instructions.

- Highlight your Comment entry, copy it, click on **Case Instructions** on the accordion at the bottom of the page and paste the copied information into the Case Instructions. (This is necessary due to character limitations in CMS, which makes it difficult to read long comments

on either the CMS browser page or the Case Record Form once the Request Details has been finalized). When finished, click on **Case** on the accordion above Case Instructions**.**

17. **NEXT>>** at top right to proceed to the **Other Assistance** tab, **NEXT>>** at top right to proceed to the **Eligibilty** tab and **NEXT>>** at top right to proceed to the **Submit** tab.

- Click Yes on the pop up box that asks "Submit the case for caseworker assignment".

The Case Intake has been <u>completed </u>when you get to the **Submitted** tab. The case is now ready for one of the Case manager or schedulers to schedule a home visit and assign a case manager and caseworkers. Click on the **Home** tab at the top of the page.

NOTE: depending on Conference procedures, the person responsible for scheduling a home visit should go to the **Submitted** tab, use the drop down menus to select a Case Manager, a Caseworker, and a Secondary Caseworker and then click **Assign.** The Case will now show up in the Assigned Cases (on the Homepage Menu) of the Vincentians assigned as Case Manager, Caseworker and Secondary Caseworker. If no assignments are made, the case will go to the Unassigned Cases (on the Homepage Menu) awaiting assignment.

CASEWORKER PROCESS

1. Click **HOME** on the top line of tabs.

2. In the bottom box **Main Menu, Options**, select **Assigned Cases for Case Worker** (if the scheduler has assigned you to a case and you have received an automated CMS notice of assignment) or **Unassigned Cases for Case Worker.** In both instances the Friend's name should appear. Click on it to select it.

- If you are going to be a Caseworker on a Unassigned Case, click **Accept** in the upper right corner and click **Yes** to confirm that you are assigning to yourself.

3. **Prepare** page will appear for all newly assigned cases. On this page you can select **Case, Client, Request Details** and **Past Assistance** from the accordions on the bottom of the page.

- Under **Case,** you can see any instructions helpful for the home visit that were left by the intake person. You can also click on the **Get Case Record Form** to print a sheet with the Friend's intake information to bring with you on the home visit (after you print it, click **Delete and Yes,** which will bring you back to the **Prepare** tab)**.**

NEXT>>

4. **Visit type**, select **Home** if you visited the Friend in his or her home or select **Telephone** if you visited by telephone. Select the **Date** of the visit.

5. **Minutes** - the number of minutes spent in preparing for the home visit, traveling to and from the home visit, the time spent with the Friend and the time spent in entering data into CMS and other follow-up activities up to that point.

6. **Miles** - use the approximate round trip mileage from your house to the Friend's home if a Home Visit. For Telephone visits, enter the minutes spent speaking with the Friend, entering information into CMS and any other follow-up work.

NEXT>>

7. **Client:** check the information for accuracy and add the information for any fields marked with a red asterisk (i.e. gender, marital status, ethnicity).

NEXT>> In the pop-up box select **Create Client.**

Household: Complete/review for accuracy the information for each person living in the same household. Fields with the red asterisk must be completed in order to proceed.

NEXT>>

8. **Situation 1/3** - Enter information about the Friend's current situation (including the reason for the requested assistance) in the text box on the top half of the page and enter the Friends plans for the future in the text box in the bottom half of the page.

9. **Situation 2/3** – Skip and click **NEXT>>** unless you know the current employer, income or other information requested on the page

10. **Situation 3/3** - click appropriate boxes for the Underlying Causes of the need for assistance

NEXT>>

11. **Assistance Requested** – Select the appropriate request (i.e. **Add Check Request**, **Add Pledge Request, Add Gift Card/Voucher, Add In-Kind**)

- The Add Check Request is only used if you want the Treasurer to immediately issue a check to a specific vendor, such as a utility payment.
- The Add Pledge Request is used to enter information about Rent Pledges for future payment upon completion of the pledge conditions.
- The Add Gift Card/Voucher is used to enter the type and value of various gift cards and vouchers provided to the Friend (food, gas, furniture, etc.), As noted in the drop-down menus.
- The Add In-Kind is used to enter any other type of in-kind assistance provided to the Friend, including referrals.
    - If you provide Referrals, select Assistance/Aid for the Category, Referral for the Resource, enter a description of what you provided in Comments, NEXT>> and skip entering any vendor information on the next page by again clicking NEXT>> .

After clicking on the type of assistance requested, CMS will open a new page requesting details about the assistance and the vendor (if any).

12. **Category** - select appropriate one (i.e. Housing/Storage, Utilities, etc.)

13. **Resource** - select appropriate response (i.e. Rent)

14. **Account Holder** (usually the Friend's name), **Pledged Amount, Client Target** (amount needed for rent, utilities, etc.) - Enter the information

15. **Acct No.** (the apartment number for a Rent Pledge, the account number form a utility bill, etc.), **Other** (you can leave blank or use this to put any other information that may be helpful to the Treasurer in issuing the payment).

NEXT>>

16. **Vendor** page describes who is receiving the payment.

17. **Vender Category** – (i.e. Housing if for rent, Utilities if for an electric bill, etc.), **Vendor** (if the name of the apartment or utility company is not in the drop-down menu, click to check the box next to **Other Vendor.**

18. Enter the **Name** (apartment complex name for a rent pledge, name of utility company, etc.), **Address** (the address of the management/leasing office for a rent pledge, which may be different from the Friend's address; the address on the bill for a utility payment, etc.), **City, State, Zip**

NEXT>>

19. Repeat the same process as 11 - 18 above to add any other assistance.

NEXT>>

20. **Attachments** - copies of receipts, pledges, lease agreements, etc. can be attached using this function by selecting **Upload**. If there are no attachments, then select **NEXT>>**

- If Uploading a document, select **Browse** and navigate on your computer to the location of the document (pdf format preferred)
- Provide a brief **Name** for the document and include any **Comments** you find helpful**.**
- Select **Upload**

NOTE: These uploads are also ONLY available to caseworkers so long as the case remains open. Once closed, these attachments are flagged for removal and are not visible except to individuals in leadership positions (who may see them for the purpose of audit). Even then, they will only be kept a limited period of time on the system - after which time they are purged. Uploaded documents should be maintained by the Conference electronically or in paper format for the period required by the Council's Record Retention Policy.

NEXT>>

21. **Checks/Pledges** tab will show a list of all of the assistance requested. If a check or pledge request was entered, the Status should read in red "Request Submitted." This completes the Caseworker process and you can return to Home to work on other cases or select Logout if you have completed your work.

IMPORTANT: Unless you advance to the Checks/Pledges tab, the checks or the pledges that you entered have not been submitted for review and appproval.

22. **Complete** once a check is issued or a pledge is paid, you can select **NEXT>>** to advance to the Complete tab, enter the current date and any notes you wish to leave about the Friend and then select the **Complete** button at the top right to archive the case file in the Conferences closed cases. A pop up will ask you if you want to close the case, and you should select "Yes". This will move the case off of the Assigned Cases and close it.

NOTE: if a Pledge has expired and has not been paid, you will not be able to close the case by until the pledge has been **both withdrawn and deleted**. You will need to click on the Pledge under either the Check/Pledges tab or Assistance tab, select the **Withdraw** button on the top right, select the Pledge again (which should now be noted as Withdrawn), select the **Delete** button on the top right and confirm that you want to delete the pledge. If no other assistance was provided, you should go to the Close Case button at the top left-hand side of the page to close the case "without assistance". You will be prompted to add a comment as to why no assistance was provided (i.e. the pledge expired and there was no further communication with the Friend). If other assistance was provided, including in-kind assistance, you can then return to the **Complete** tab and close the case as noted in 22 above.

GENERAL TIPS

- If you ever return to an earlier tab (such as Client, Household, Situation) to make any changes in CMS does not allow you to enter information, go to the last tab on the menu that has been opened and click the **<<PREVIOUS** button on the top right until you get back to the tab where you would like to make the change. Additionally, if you ever see the **RESTART** button on any page where you are not allowed to make changes, click on the **RESTART** button, which should allow you to enter changes and otherwise work on that page.

- **Search:** You can use a search function to find both open and closed records within CMS.

    o The **Client** search is very broad and looks for any individuals entered into the CMS system throughout the entire archdiocese of Galveston Houston

    o The **Case** search looks for open and closed cases in CMS within only your Conference.

    o If you are doing a Search and are not sure of the spelling of a name, you can use a **%** sign as a way to match any trailing letters. For example, if you search for a client using First name:Ch%, Last name:Clarke, CMS will let you choose from Chan'Te Clarke as well as Chante Clarke as well as Chanti Clarke, etc. You can use the % function on First Name, Last Name, Address, City and SSN. It is especially helpful to use with address suffixes such as Drive/Dr., Place/Pl., etc. If the client was previously entered as Dr. and you enter Drive in your search, you will not find a match. So when doing the search put in D% and you will find all potential matches.

- **User Guide**: Detailed information about all CMS activities and functions can be located by clicking on the User Guide tab (5th tab from the left on the top of any CMS screen). The table of contents is attached. You can also contact the Conference CMS Administrator with any questions or issues you encounter.