

## Enhancement: Change

*Enhancement:* Casework Situation tab is consolidated into two forms

- The |Situation| tab has changed from three (3) required forms to two (2).
- The second form is now optional.

*Enhancement:* Allow attachment upload at any point in the visit flow

### Pre-Visit > [Options] > [Attachments]

- Attachments are now possible during caseflow before the |Assistance| task completion.

*Enhancement:* "Select all" button for items in the Role assignment grid

### My Conference > |Roles| > [Select all]

- "Select all" button for selection and removal of Member roles in a Conference.

*Enhancement:* Move Request Merge button to left button bank

### [Merge]

- Position [Merge] button for greater visibility in Casework, Outreach & Food Bank Pantry

*Enhancement:* Option to navigate and review cases before auto-closing

### Case Manager > Options > Auto Close

- Case Managers can review individual cases within their Auto Close list.
- Case Managers can still close an aggregate list or set of cases using Auto Close.

## Enhancement: Change (cont.)

*Enhancement:* Check Number field disabled if an ePay option is selected

### **Check Request > Payment Type > ePay**

- This is a requested refinement from ePay delivered in release 4.1.010
- Check Number field will be grayed out if an ePay option is selected within the Check Request Form.

*Enhancement:* Enhanced DOB validation

### **{DOB}**

- Secondary logical validation on the Year used within the DOB calendar function.
- Warning only popup when DOB results in age outside of plausible range.

*Enhancement:* Add homeless filter to all applicable reports

### **Diocesan Reports, Conference Reports**

- Homeless filter and/or a check box present on certain report masks to filter for Homelessness.