Release Version 1.91

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Release Changes

Numerous changes have been implemented into a new release 1.91 effective April 11th 2015. This release exemplifies our continued efforts to make CAP60 more streamlined, customizable, and automated. Major enhancements include changes to the CSBG Report, Self Sufficiency Matrix, and Case Audit History. The following are the fixes and updates for the Release 1.91**:**

Program	Module	Topic	Area/Mapping	Description
			CAP	
CAP	Admin	Intake Required Fields - Disabled	Admin > Agency mgmt > Intake reqd fields	Disability has been added as an optional required field during intake as set under the Admin link.
CAP	Admin	Choose status when rolling over a case	Admin > CAP > Roll Over > Cases	When rolling over a case to the next year, can choose the status for the case.
CAP	Admin	Adding Time Zone for Atlantic	Admin > Agency Management	Added AST time zone for Caribbean (Atlantic) countries.
CAP	Admin	WA LIHEAP Form	Admin > Agency Setup Links > Form Templates	On the existing PSE/LIHEAP form, more fields have been set as "required". The minor issue that they had with printing is fixed.
CAP	Admin	CSD Wx Changes	Admin > Agency Setup Links > Form Templates	New validators have been added to current intake forms. Three new columns/specifications were added to measures.
CAP	CAP	Phone Number Field	CAP > CAP > Family Information	Added red asterisk to the required Primary phone field.
CAP	CAP	Adding 'Unspecified' to "Veteran Status"	CAP > CAP > Family Information	Added "Unspecified" to Veteran status and a customizable "Transgender" dropdown, so that agency does not have to assume Veteran status, and to provide more gender options.
CAP	CAP	Primary Language missing	CAP > Add Client - Long	CAP new client Add Additional Family Member pages have been updated to allow the capturing of all information such as language and religion.
CAP	CAP	Allow customization of Report Card options	CAP > Report Card > Conduct Options	Added a feature for report card grade and conduct so that they can be customized in Admin > CAP > Dropdown Designer.

CAP	CAP	Other Housing field added to Family Information screen	CAP > CAP > Family Information	Added a few fields in CAP > Family Information for convenience.
CAP	CAP	Service Duplicate Validation	CAP > Case Information > Case Summary > Add Service	Added validation to prevent addition of second service with duplicate date and resource.
CAP	CAP	Family Printable documents to showcase year for cases listed	CAP > Family Printable Documents > Family Information / Signable Family Information	Added year to program list in the Family Printable document for reference.
CAP	Cap60 Lite	CAP60 Lite, Section G, adding program for entries	Cap60 Lite > CSBG Lite > Section G	Can be added for specific program. Also added a link to CSBG report to include CSBG Lite Section G data.
CAP	Cap Reports	View/Export Persons/Families w/ Names	CAP Reports > Demographic > Demographics Report > View/Export Persons/Families	Added additional data to CAP Reports > Demographic > Demographics Report > View/Export Persons/Families so that case workers can identify clients more easily.
CAP	CAP Reports	Front desk report	CAP Reports > Front Desk > Pie Chart	Fixed the view overlapping issue with the legend.
CAP	CAP Reports	Staff access issue for CSBG reports	CAP Reports > CSBG > CSBG Report	Allows access to the programs based on user's login.
CAP	CAP Reports	Transmittal report	CAP Reports > Services > Transmittal Report	Added the number in household back to transmittal report.
CAP	CAP Reports	CSBG Parameters	CAP Reports > CSBG > CSBG Report	Updated CSBG reporting options to allow multiple options per filter such as county, program, service, etc. to give more flexibility for reporting.
CAP	CAP Reports	CSBG Changes	CAP Reports > CSBG > CSBG Report	Updated CSBG report so that a report can be run for over a one year period. An outcome year must be selected for the report which will then combine outcomes over multiple years based on CSBG Previous Year Mapping.

CAP	CAP Reports	CSBG Section G Education Level	CAP Reports > CSBG > CSBG Report	CSBG report has been updated to use more Case Audit information rather than live data to increase accuracy over time.
CAP	Dashboard	Weatherization Dashboard	Dashboard > WX Dashboard	Adjusted Weatherization Dashboard so data is displayed correctly.
CAP	Family	Red text in the Family PIR Module	Family > Family PIR	Fixed the text Color issue on the page.
CAP	Front Desk	Front Desk	Front Desk > Add Non-Client Referral	Added date range filter to Front Desk > Non-Client Contact.
CAP	Group Activities	Group Activities	Group Activities > CAP > Achieved Outcomes	Added Achieved Date filter for Group Activities > Achieved Outcomes
CAP	Inventory	Adding Resources to Inventory	Inventory	Added ability to add Inventory to a Resource.
CAP	Productivity Tools	Event Manager / Room capacity	Productivity Tools > Event Manager > Select Room Max	The room capacity issue cause by deleted columns is fixed. Also fixed page redirect issue.
CAP	Productivity Tools	County Drop Down Search	Productivity Tools > Employee Time > Clock In and Out Report	Added Agency and Center dropdown lists to Productivity Tools > HR Manager > Clock in and out report. Staff dropdown is dependent on center dropdown.
CAP	Reports	Front Desk	CAP Reports > Front Desk > Non Existing Client Totals	Added phone field to the Front Desk > Existing (and Non Existing) Client Total.
CAP/HS	Reports	Family Referral should not have domestic violence information visible	Reports > Family > Family Referral	Added additional access filtering to many Reports so when the Program Filter is set to All, the results are limited to only those programs the user has access to.

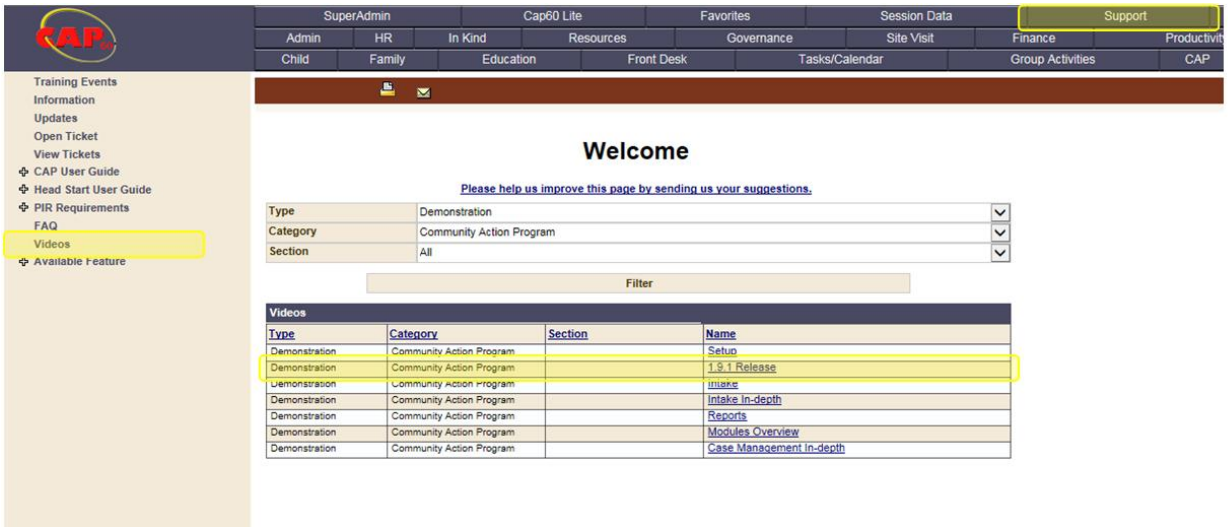
Program	Module	Topic	Area/Mapping	Description
			HEAD START	
HS	Admin	No Class Days Template	Admin > Agency Management > No Class Days > Apply Template	Added a feature in Admin > Head Start > Agency Management > No Class Days to streamline the process to make it easier to add No Class Days Template.
HS	Admin	HS Transfer Family Members	Admin > Head Start > Delete/ Transfer Records > Transfer Family Member To New Family	Added functionality to move a family member to new family.
HS	Admin	Disability Drop Down	Admin > Drop Down Designer	Customized Child > Disability > Recommendation > Therapy dropdown list. Now we can go to Admin > Head Start > Dropdown Designer > Disability > Disability Therapy to customize the options.
HS	Admin	Reverse a Roll Over	Admin > Roll Over > Cases	Allows users to reverse a "Roll Over" case when no data is attached.
HS	Child	Vision screen needs a pass, rescreen needed and fail in the result area.	Child > Health > Vision	Vision exam New drop down box showing Result as 'Pass' or 'Fail' has been added.
HS	Child	Evaluation information when parent withdraws consent	Child > Disability	Moved Parent Permission for Evaluation and Date Withdrew from Evaluation section to Referral section. Added 'Parent Permission' field under referral section.
HS	Child	Add separate option for blood pressure in health screening area	Child > Health	Added 'Blood Pressure' event in Child > Health that lists all blood pressure screenings, including from Physical events.
HS	Child	School Year	Child > Search All	Added 'All' option to school year drop down.

HS	Child	Vision insurance data isn't displayed on main Child - Health page	Child > Health	Added Vision insurance section under 'Health Insurance Information' in Child > Health.
HS	Child	Add two options to Speech drop down menu	Child > Health	Added two options to expressive and receptive language drop down list.
HS	Child	Child - Child PIR: Nationality field	Child > Child PIR	Added Race and Nationality fields under Child > Personal Info.
HS	Child	Child-Mental Health	Child > Mental Health > Add Case Log	Added 'Mental Health Consultation' option for 'Service Type' dropdown list at Child > Mental Health > Case Log.
HS	Education	Child Assessment	Education > Child Assessments	Added a feature to ignore points in Admin > Child Assessments > Scores. This is to prevent incomplete or missing data from being averaged into the total score.
HS	Family	Text Boxes/ Observation Print outs	Family > Family Visits	Enlarged observation on child visit view so that it prints out without truncation.
HS	Family	Family visit report	Family > Family Visits	Family > Family Visit - Increased "Purpose" text box size.
HS	Family	Family Module - Family Visits: change to display most recent entry first	Family > Family Visits	Sort family visit list from the most recent first.
HS	Family	Validator for Inactive Centers with Enrollment Records	Family > Add New Family	Added a validator so that a center can't be deleted if there are enrollment records.
HS	Family	Add Upload Document function to Family module	Family > Document Upload	Provided functionality for uploading documents in family module.
HS	Group Activities	Group Activities	Group Activities > Head Start > Child Referral	Added a group activity feature for family referral and services.

HS	Group Activities	Drop down - group activities	Group Activities > Head Start > Child Referral	Clients can add Child referral reason through Dropdown Designer to appear on Child Referral Page.
HS	Group Activities	Family Activity Form	Group Activities > Head Start > Family Activity	Added a feature in Group Activities > Head Start > Family Activity. This feature allows us to add family goal and activity for the whole class and, hence, affect all children in the class. In Child module we can enter the result individually.
HS	HR	Training	HR > Training	Added features for individual training in HR module. Now we can customize individual training separately from group training.
HS	Reports	Immunization reports	Reports > Immunization > Due Dates	Added 'Next Calendar Month' field under Reports > Immunization > Monitoring so that we can monitor immunization due date for next month.
HS	Reports	Immunization reports	Reports > Immunizations > Monitoring	For Monitoring report 'due in 4 weeks' column has been added. This column shows immunization for applicant if they are due in coming 4 weeks.
HS	Reports	Foster families not showing on report	Reports > Eligibility > Foster Children	Disabled Homeless and Foster Children report links since you can get the same information from the Eligibility Reason report and EPC Detail reports.
HS	Reports	Mark holidays on the class roster report	Reports > Attendance > Class Roster	Mark the no class days in Reports > Attendance > Class Roster-Monthly so that staff members don't have to do it manually.

HS	Reports	Waiting list filter and header	Reports > Enrollment > Waiting List / Waiting List - Class Based	Added report header for printing to Waiting List-Class Based. Added date range filter to Waiting List.
HS	Reports	Custom Class List	Reports > Enrollment > Class List	Added a report called "Class List Details" to show detailed information for applicants per class.
HS	Reports	Attendance Summary Report	Reports > Attendance > Attendance Summary	Added Teacher name fields to Attendance Summary Report.
HS	Reports	Adding third and fourth child visits.	Reports > Education > Child Visit Per Case Worker	Added Third and Fourth Child visits under Reports > Education > Child Visit Per Case Worker.
HS	Reports	Add 'referral' on the Family Goals report	Reports > Family > Goal	Added Referral field to Reports > Family > Goal.
HS	Reports	Sign in sheet 6	Reports > Attendance > Sign-In Sheet 6	Added the selected date at the top of the Sign-in sheet 6 in Attendance.
HS	Reports	Primary Language - No Addtl Criteria	Reports > Child / Applicant > Primary Language	Added additional criteria to Reports > Child > Applicant > Primary Language.
HS	Reports	45 day screen tracker report	Reports > Developmental > 45 Day Screen Tracker	Added behavioral exam date field for Developmental > 45 Day Screen Tracker.
HS	Reports	ERSEA Attendance Validators	Child > ERSEA > Transfer / Correct Record	Added validators to ERSEA > Transfer and Correct Record to prevent duplicate attendance.
HS	Reports	Customize Family Goal Report	Reports > Family > Goal	Added Assessment Outcome field to Reports > Family > Goal.
HS	Reports	Add birthdate to EPC Detail report	Reports > Eligibility > EPC Detail	Added birthdate field to Report > Eligibility > Epc Detail.
CAP/HS	Reports	Family Referral should not have domestic violence information visible	Reports > Family > Family Referral	Added additional access filtering to many Reports so when the Program Filter is set to All, the results are limited to only those programs the user has access to.

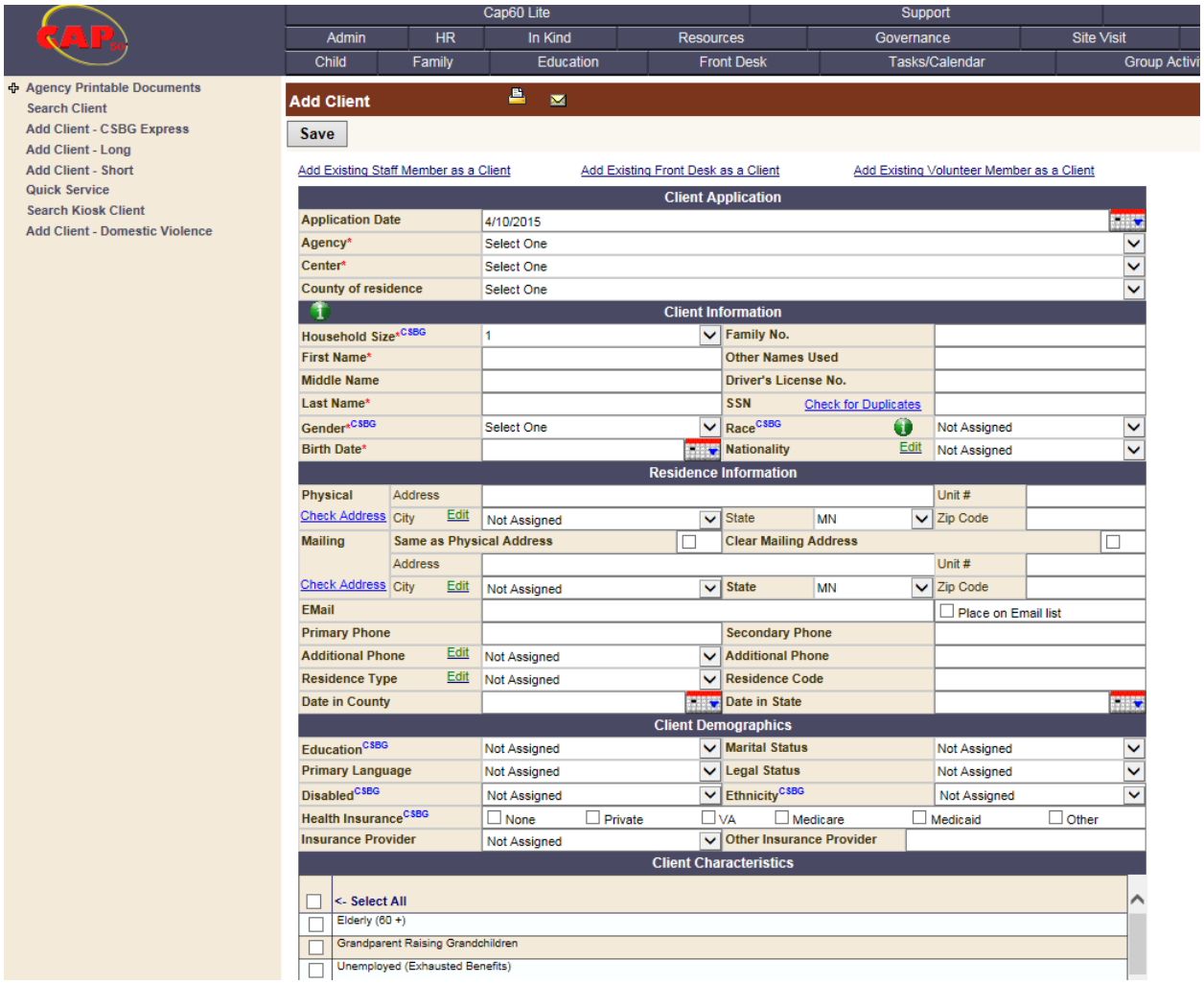
The Changes listed above are in video format and can be found in your system by going to Support > Videos. You can filter the list for easier location to “Type - Demonstration” and “Category - Community Action Program.”



I want to take the opportunity to advise everybody of the changes that you will encounter, in your database, after the update has been completed. Please keep in mind, some of these changes may or may not be for your agency; therefore, you may not use every functionality. If the staff members at your agency require training to get up-to-date with Cap60, or if they have any questions/concerns, please don’t hesitate to contact your project manager.

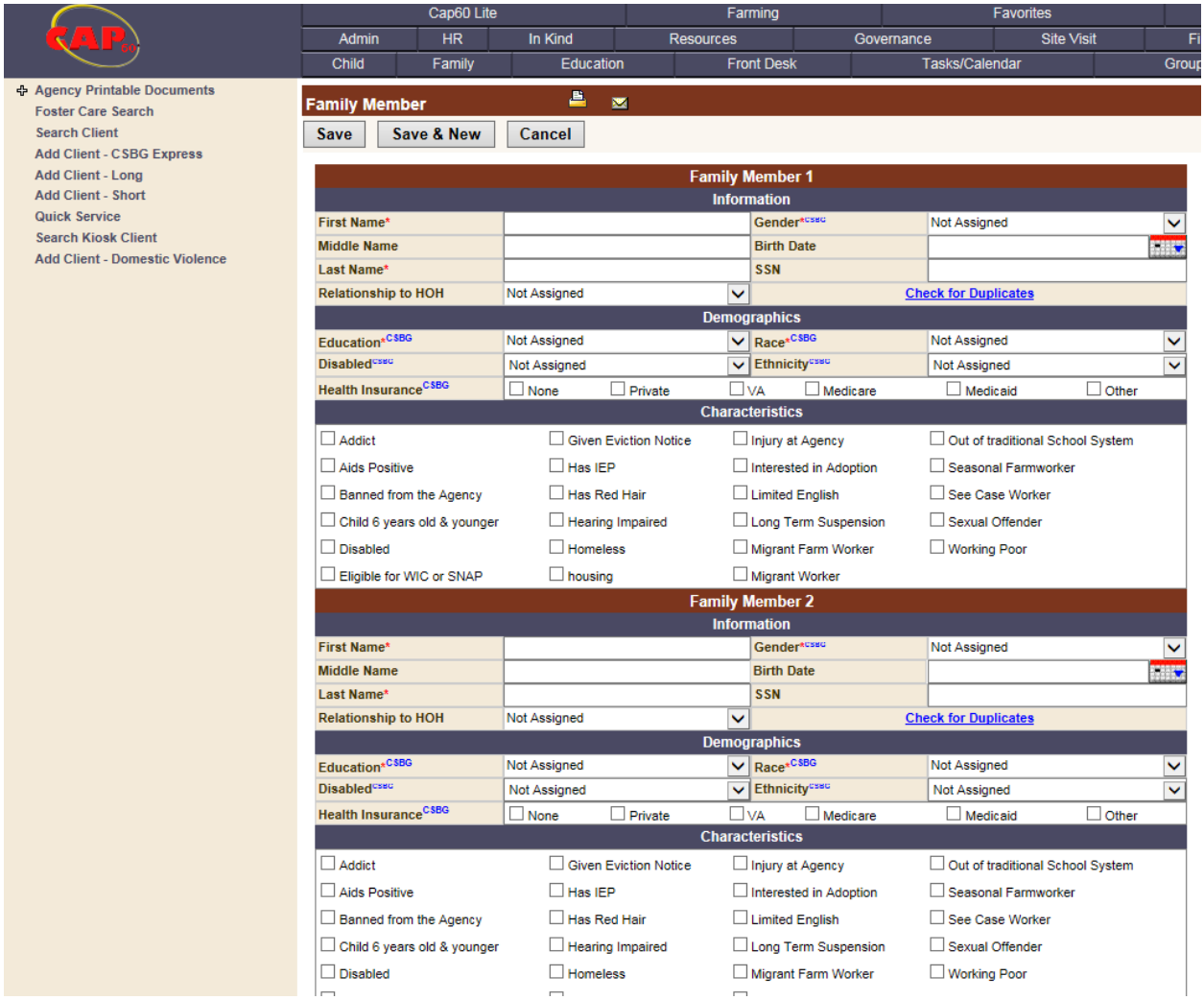
Add Household Pages

Add Household Pages > Previous Versions > Long and Short



In the previous versions of CAP60, the Add Client Links appeared separately and we required that the Head of Household information be added at the same time as the Household address and demographic information. The difference between the long and short forms was just the number of fields that were collected.

Furthermore, assuming that the first person to be added was the applicant or HOH was causing issues for agencies with programs such as Youth or Domestic Violence.



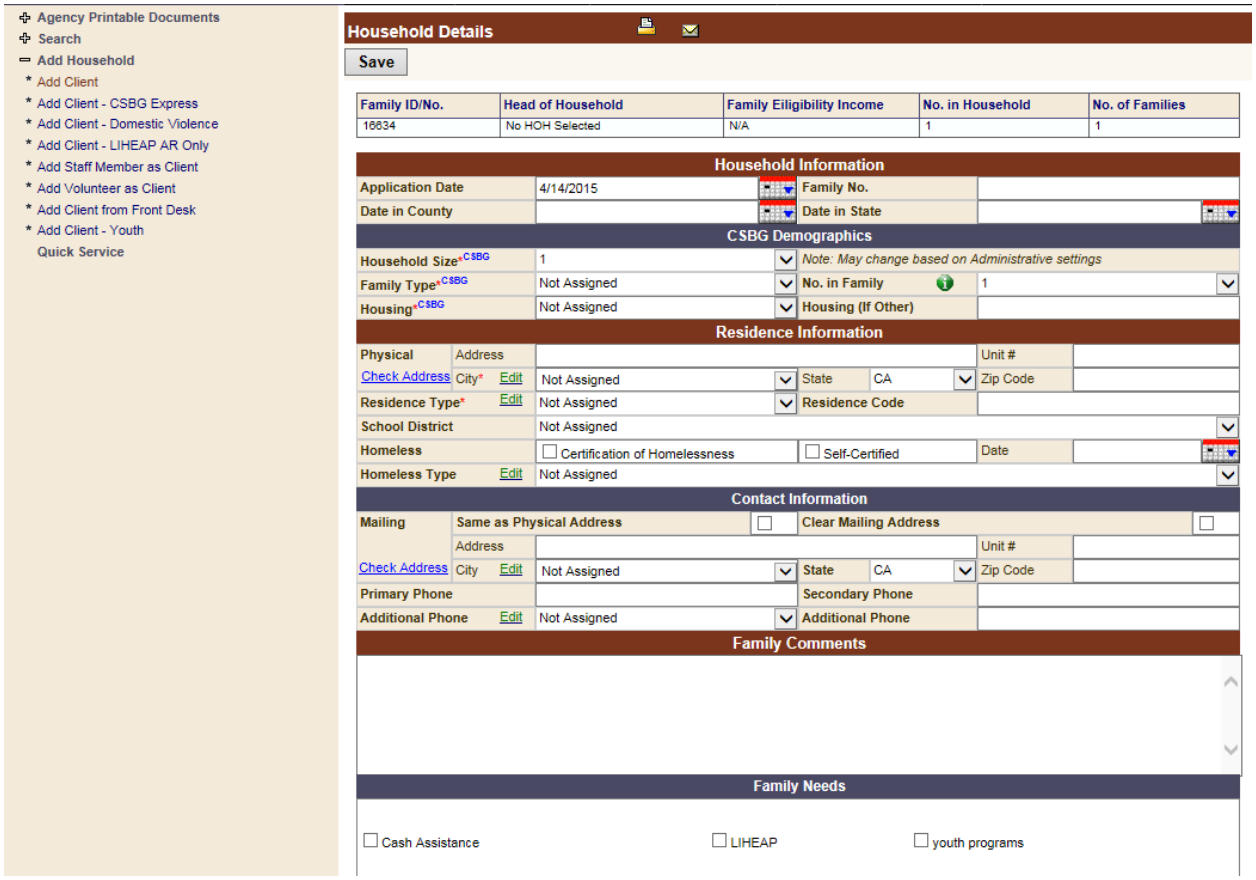
The long form collected most all of the family fields but it did omit some HOH fields while the short form was missing many family and HOH fields. Therefore we had received requests from many agencies to add additional fields to the pages such as “Secondary Language”, “Religion”, Contact Information, etc. The lack of those fields caused issues due to the fact that one would need to complete adding the Household then proceed to edit the Members to collect all of the information required by their agency.

Add Household Pages > New Version > Add Clients



In v1.91 we have separated the Add Household pages so that only Household OR Person information is collected on each page while presenting all of the fields normally available on the CAP Family pages.

The first page when adding a household collects Person Information (with the exception of Agency, Center, and County as highlighted above) and we addressed the issues of assuming the first member is the HOH by adding a relationship field to the page.

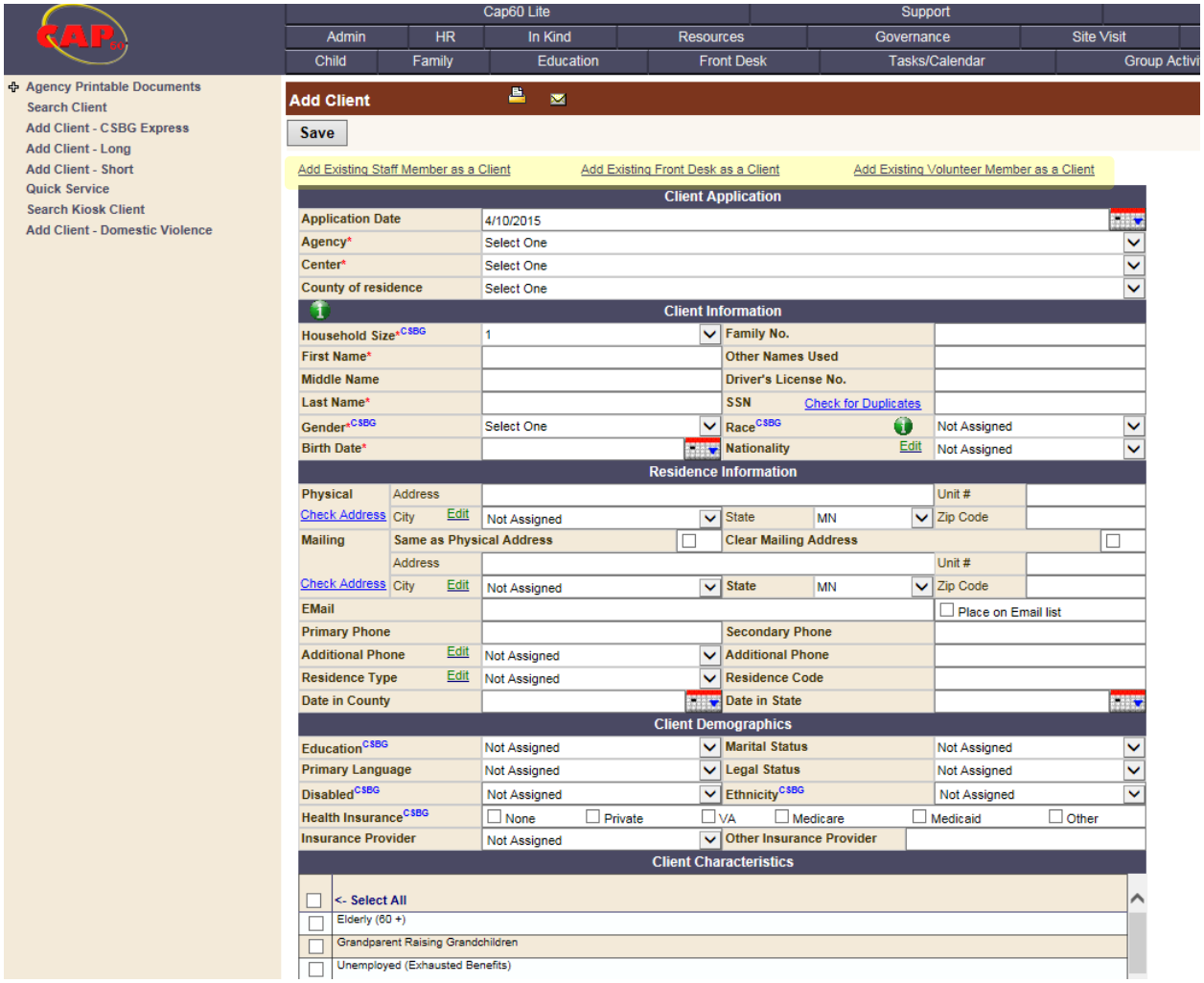


The second page collects all of the Household information other than the exceptions mentioned above. We have added a note regarding “Household Size” to various pages in the system where it can be changed that says, “Note: May change based on Administrative settings.” A pre-existing setting in the admin section (which will be discussed later) controls whether the system automatically changes the Household size to the number of family member records attached to that family or lets the case workers set it to a value other than what exists. If the setting to automatically count is set, the number the case worker selects here may change based on what they do later in regards to adding and removing household members.

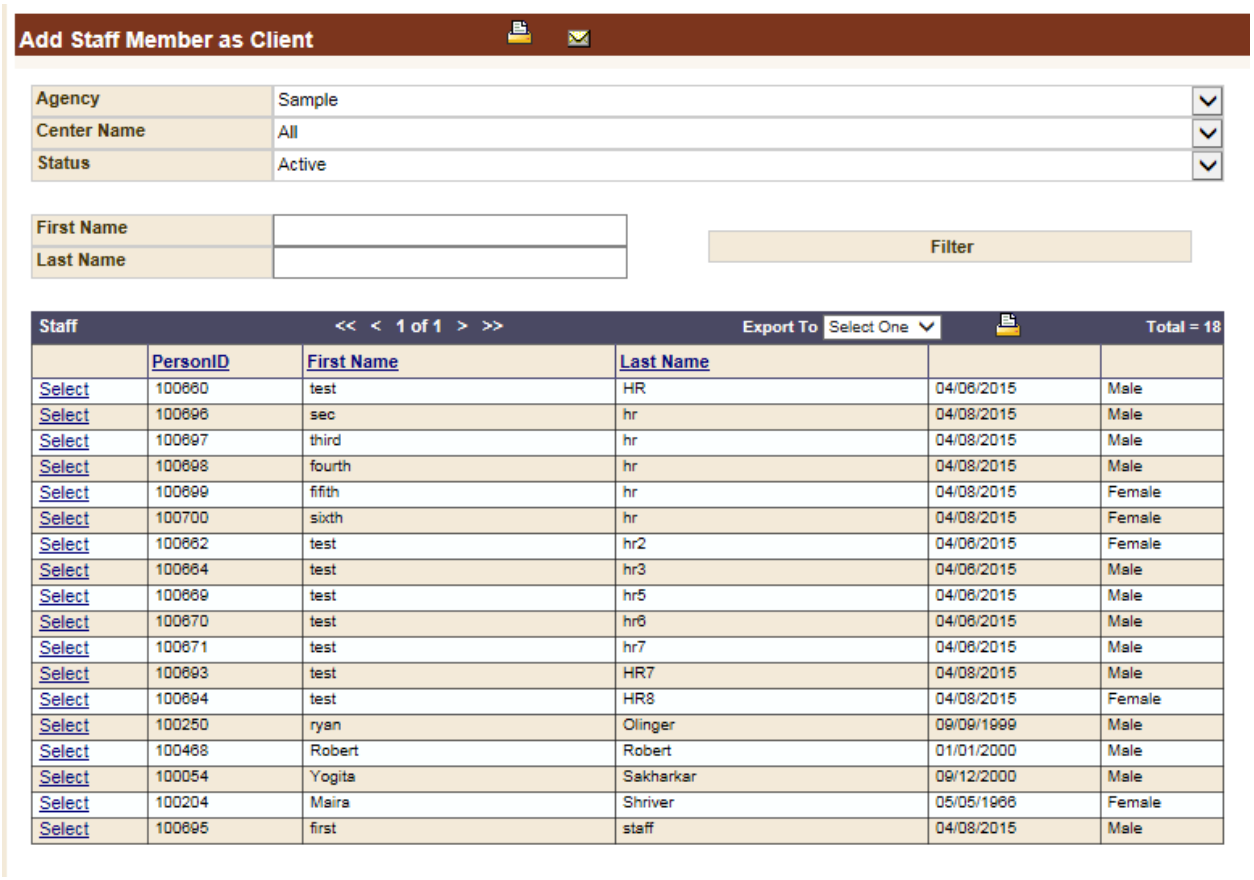


Following the “Household Details” page will be the typical add “Family Member” page as seen when adding members to an existing household. This page replaced the old page in the “Add Household” process that allowed the adding of four members simultaneously but with a limited number of fields. You may click “Save and New” as many times as needed to add all of the household members. Clicking Save or Cancel will take you to the “Family Information” summary page from previous updates.

Add Household Pages > Previous Versions > Migrating Existing Members



In the previous version of CAP60, adding a Staff Member, Volunteer, or Front Desk record to the Live Client listing was done by going to the "Add Client" page then selecting the appropriate link from the top.



Add Staff Member as Client

Agency	Sample
Center Name	All
Status	Active

First Name	
Last Name	

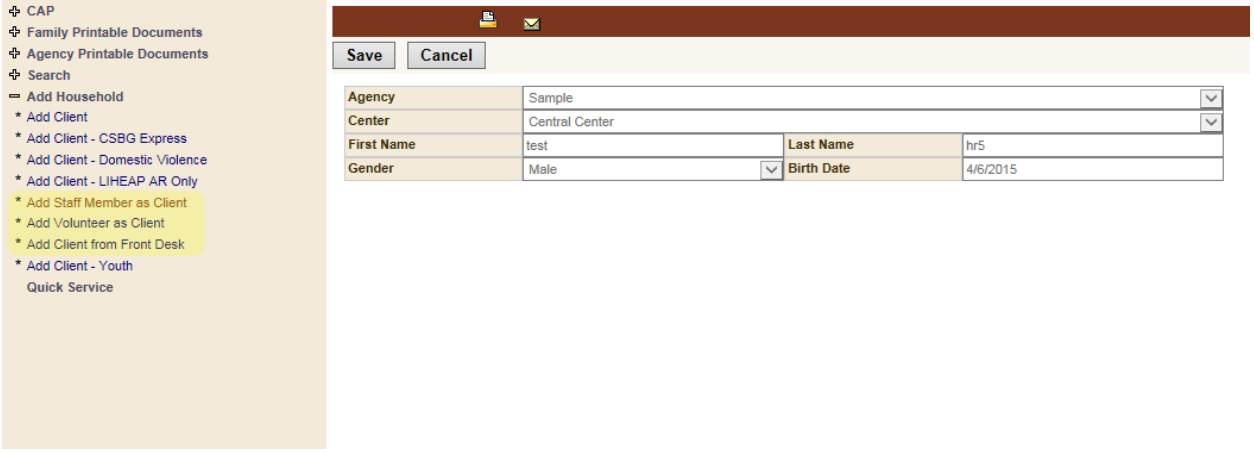
Filter

Staff << < 1 of 1 > >> Export To Select One Total = 18

	PersonID	First Name	Last Name		
Select	100660	test	HR	04/06/2015	Male
Select	100696	sec	hr	04/08/2015	Male
Select	100697	third	hr	04/08/2015	Male
Select	100698	fourth	hr	04/08/2015	Male
Select	100699	fifth	hr	04/08/2015	Female
Select	100700	sixth	hr	04/08/2015	Female
Select	100662	test	hr2	04/06/2015	Female
Select	100664	test	hr3	04/06/2015	Male
Select	100669	test	hr5	04/06/2015	Male
Select	100670	test	hr6	04/06/2015	Male
Select	100671	test	hr7	04/06/2015	Male
Select	100693	test	HR7	04/08/2015	Male
Select	100694	test	HR8	04/08/2015	Female
Select	100250	ryan	Olinger	09/09/1999	Male
Select	100468	Robert	Robert	01/01/2000	Male
Select	100054	Yogita	Sakharkar	09/12/2000	Male
Select	100204	Maira	Shriver	05/05/1966	Female
Select	100695	first	staff	04/08/2015	Male

From there you would be taken to a page where you could search for the person, select them, then be taken back to a similar looking page to “Add Client” but some of the fields such as Name, Gender, and Birthday would be pre-populated. Since it used the same or similar pages as the regular “Add Client” workflow, it suffered from many of the same issues.

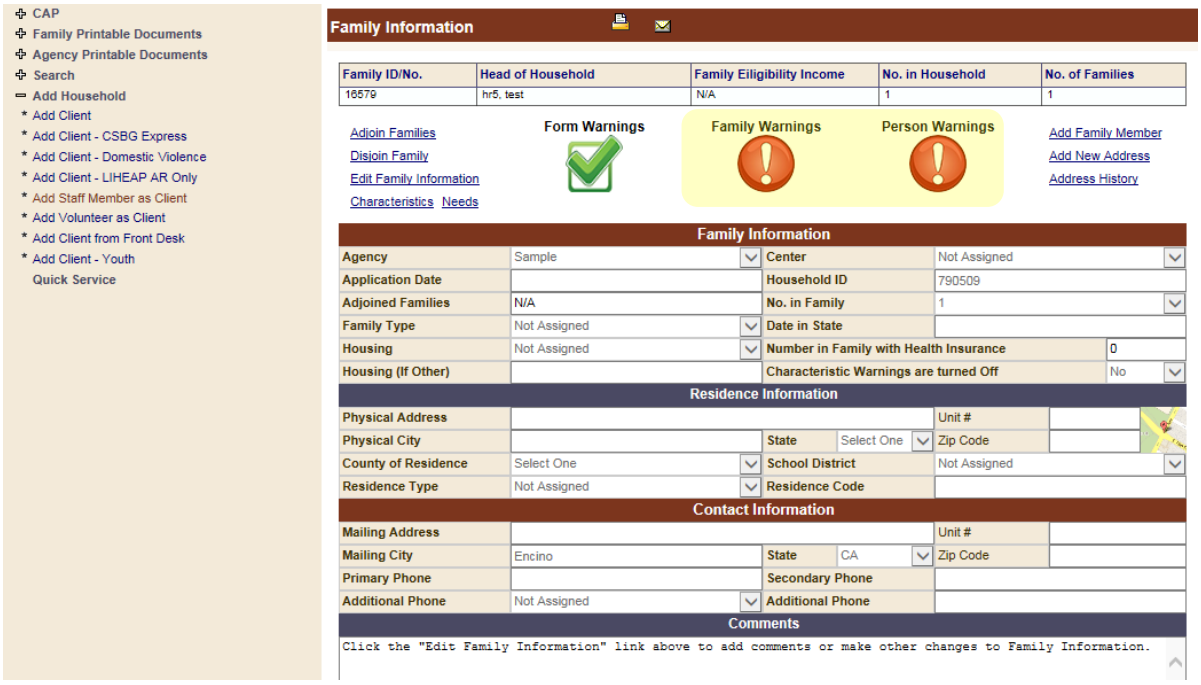
Add Household Pages > New Version > Migrating Existing Members



In the new version we have moved those links over to the side bar navigation pane. This has the advantage of being able to control user access to these links while also adding room for potential growth. Clicking one of the links will take you to the same page as pictured on page 17 above. Selecting a person from one of those lists will take you to a similar confirmation page from previous versions pictured directly above.

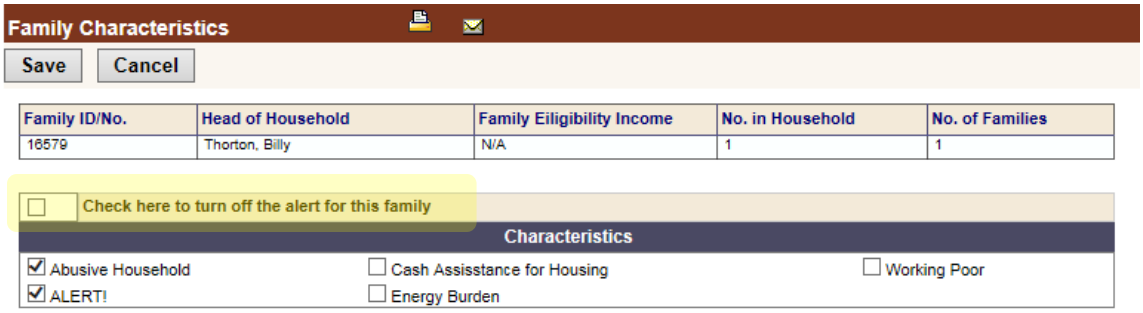
The main difference here is that saving the selected member no longer takes you back to the "Add Client" page which would then follow through to the "Add Family Members" page which omitted many of the person fields an agency may want to collect. Once "Save" is clicked, you will be taken to the typical "Family Information" summary page as the Family for the person selected already exists, it just needed to be set to be visible as a "Client". The caseworker can now edit the family, family member, or add members as needed in the classic fashion.

Add Household Pages > Intake Required Field Validation

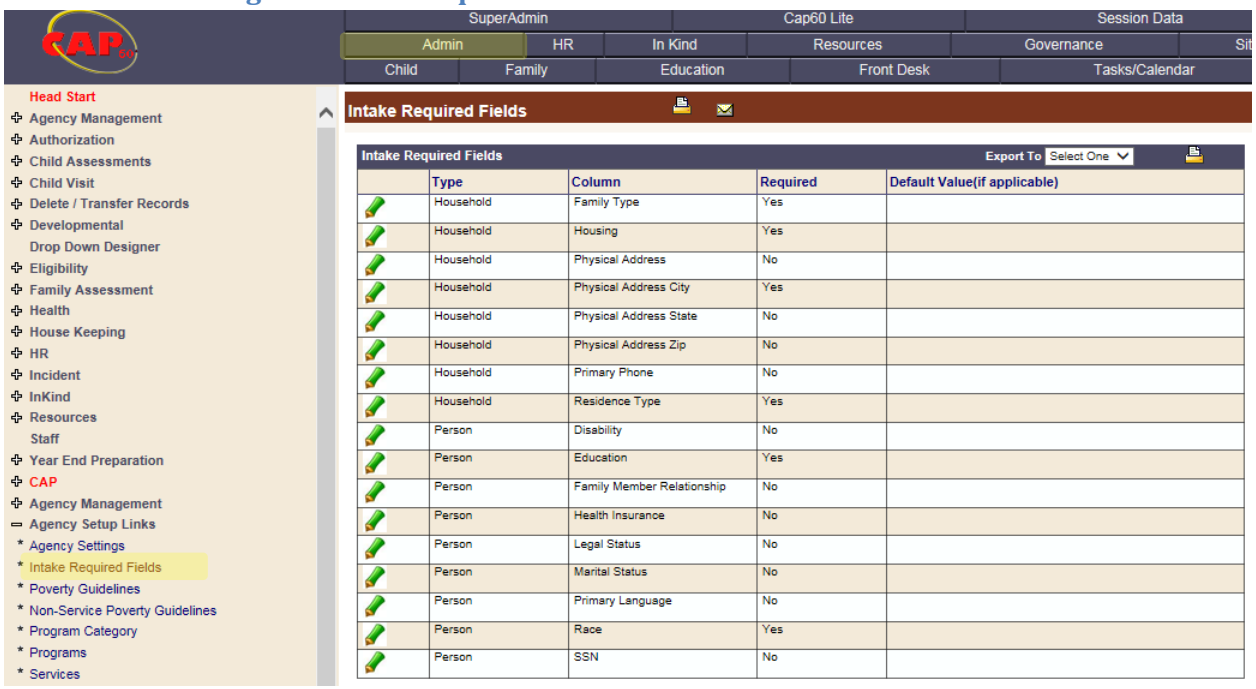


There have been some changes to “Warning” labels on the “Family Information” summary page and the “Case Summary” page due to the fact that legacy clients in the system may not have data in all of the “Agency Required Intake Fields” (a classic setting that will be discussed further below). This could happen in several ways such as the agency has set additional fields as required since the legacy client intake occurred, or they added a staff member as a client that was also missing some fields.

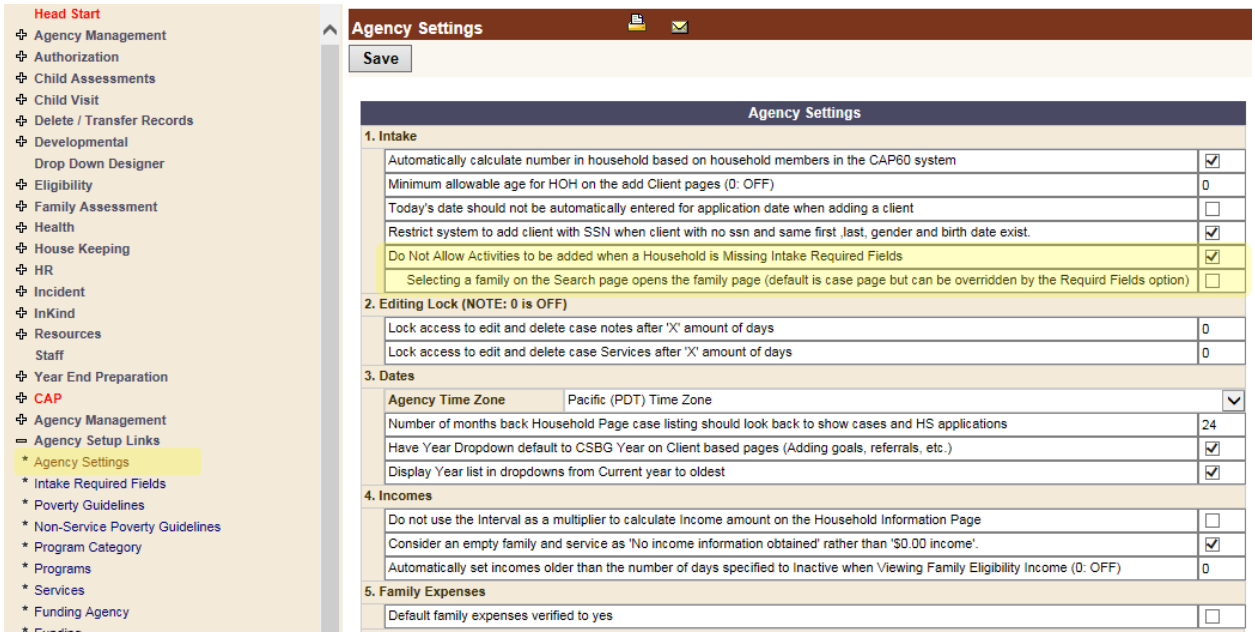
Previously the Family and Person Warning labels would only turn red if there were characteristic warnings set off. The labels will now also fire if the Family or Person records are missing any of the agency required fields as well. As before, you may click on the warning label to be jumped to the family/person causing the issue. Once on the appropriate page, the classic red asterisks and field validation will ensure that all required fields are collected. Please note that the required fields take precedence over characteristic warnings, therefore if a family has both warnings, clicking the link will take you to “Edit” page to collect the required fields before taking you to the page to turn off characteristic warnings.



Add Household Pages > Intake Required Field Validation > Admin



The page above can be found by going to Admin > Agency Setup Links > Intake Required Fields. There have been no major changes to this page other than we have detailed where the intake field applies to as well as adding a “Disability” option for persons. For the warning labels or page validations to fire, items in this section must be set to “Yes”.



The page above can be found by going to Admin > Agency Setup Links > Agency Settings. There have been no major changes to this page other than reordering a few of the items and the addition of an extra option, “Do Not Allow Activities to be added when a Household is Missing Intake Required Fields.” This option works in conjunction with the “Intake Required Fields” mentioned earlier as well as the warning labels which are the visual representation of the required fields.

This option is designed to allow an agency to FORCE its caseworkers to capture required data for those legacy clients, migrated clients, or any other type of client that may not have a value for all of the required fields set by the agency. The main reason for this would likely be the demographic reports in the system but agencies that have customizations throughout the system may also rely on some “Intake Required Fields.”



When the "Do Not Allow Activities to be added when a Household is Missing Intake Required Fields" is turned on and a household or its members do not have complete data as set by the required fields, all of the activity links for the family will be removed. As you can see in the picture above, the only link available for the Family is the "Family Information" link. This means a case cannot be added, a referral created, a goal set, or any other type of activity that would cause this family or its members to appear in the demographics reports.

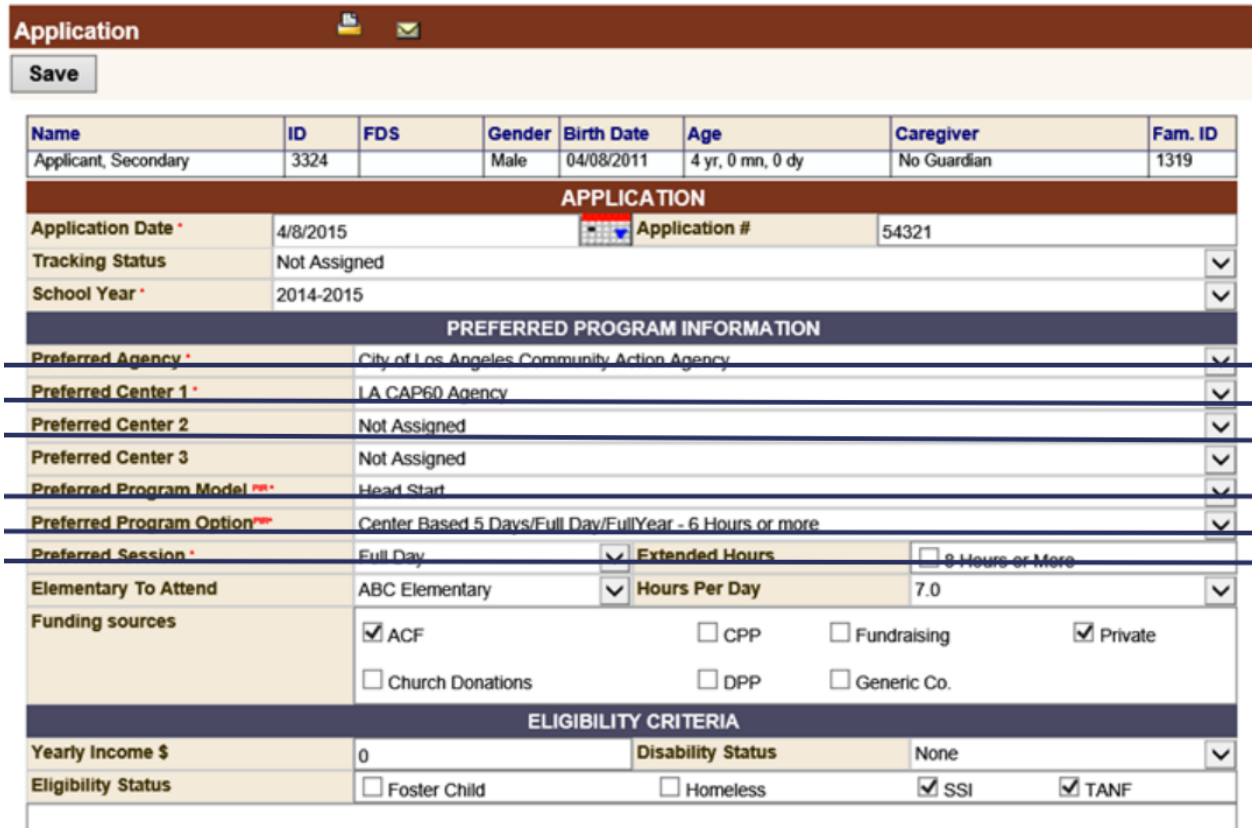
To gain access to the links, the caseworker will need to fill in the missing information, which as mentioned above is most easily accomplished by clicking on the red buttons to jump to the issue. The information can also be completed in the traditional methods of clicking the "Edit Family Information" link or editing the Household Members by clicking the links at the bottom of the page.

This setting can help solve many of the issues facing agencies in regards to demographic data but please be aware that this is obviously very restrictive and if there is a field set to required that a caseworker does not have the means to complete, it may make it impossible for them to serve the client. That being said, most of the CSBG demographic fields contain an "Unspecified" option which will allow the caseworker to move forward even if they don't have the information required.

Lastly, the setting on the "Agency Settings" page, "Selecting a family on the Search page opens the family page (default is case page but can be overridden by the Required Fields option)" has had its wording slightly altered because it interacts with the locking a Family due to missing fields option. If the default jump to page from the "Search" page is the "Case Summary" but the household is missing required fields, the system will still take the caseworker to the "Family Information" summary regardless of the option preference to ensure the fields are collected before adding any cases.

ERSEA Changes

ERSEA Changes > Form Changes



The changes in ERSEA begin with the application. As you can see the preferred program Information section has been trimmed down to the preferred agency field, the preferred program model and funding sources. You will notice the preferred program center, option, session and hours options are missing on the page but the session and option will be entered later. Application information, Eligibility and USDA sections remain.



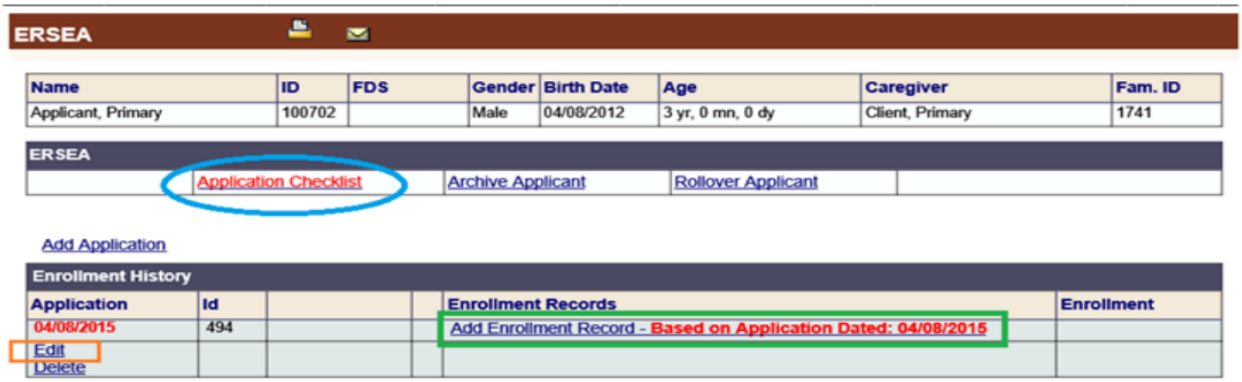
Once the initial applicant information is completed, you are directed to the ERSEA application. This was the previous page we have been familiar with in completing. The biggest change to this page and ERSEA is the addition of the number in family field. Having this information directly in the application will ensure “time of enrollment” eligibility regardless of changes in the family information pages found in both the HS and CAP components.

ERSEA Changes > Workflow Changes

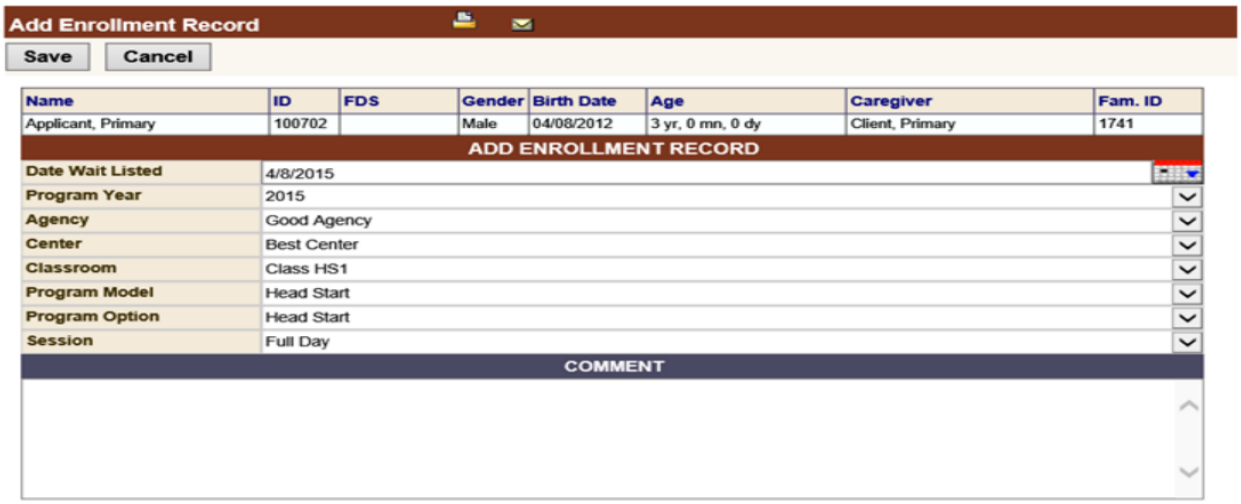


In the previous version of ERSEA pictured above, we had the red, highlighted hyperlinks which one would follow to complete the ERSEA workflow.

The new ERSEA pictured below retains the Application checklist link along with the archive and rollover links. Unlike the previous version we now have two links, edit and delete. The "edit" link replaces the application link. You will click on the edit link to enter additional enrollment information such as the program option or modify the application. The delete link will delete the application itself.

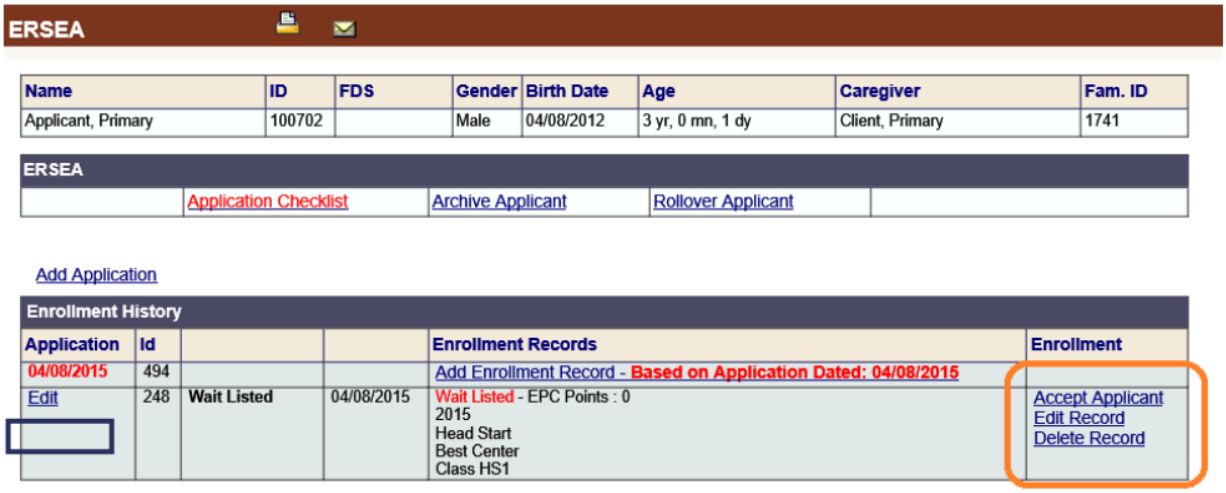


Once the application has been completed, you then proceed with the application checklist. The application checklist remains unchanged.

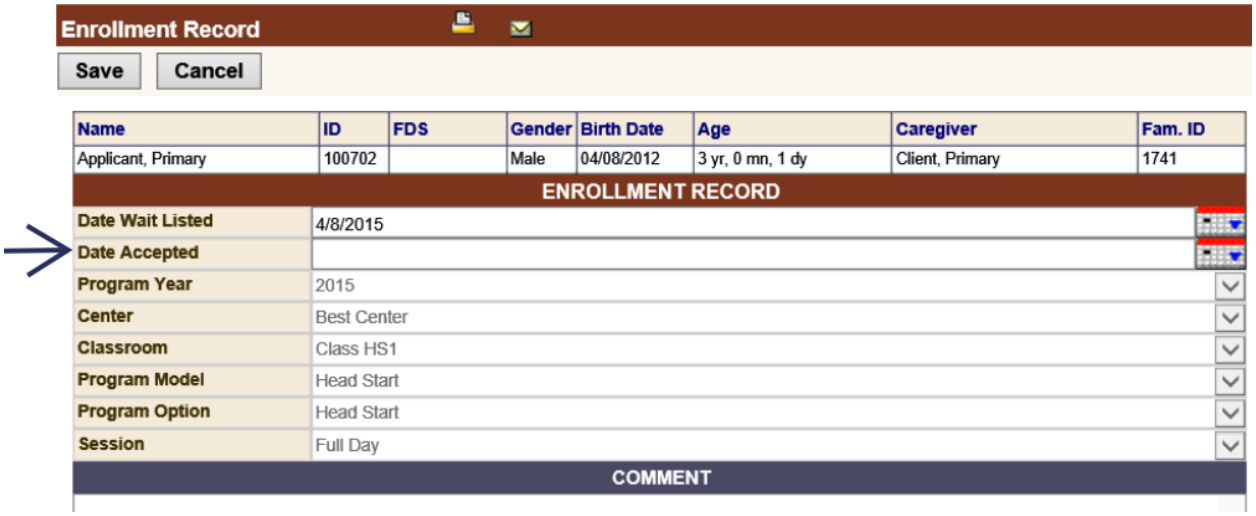


Once that has been completed, the next step is to “add enrollment record” by clicking on the link. Here you will select the waitlist information for the applicant and save.

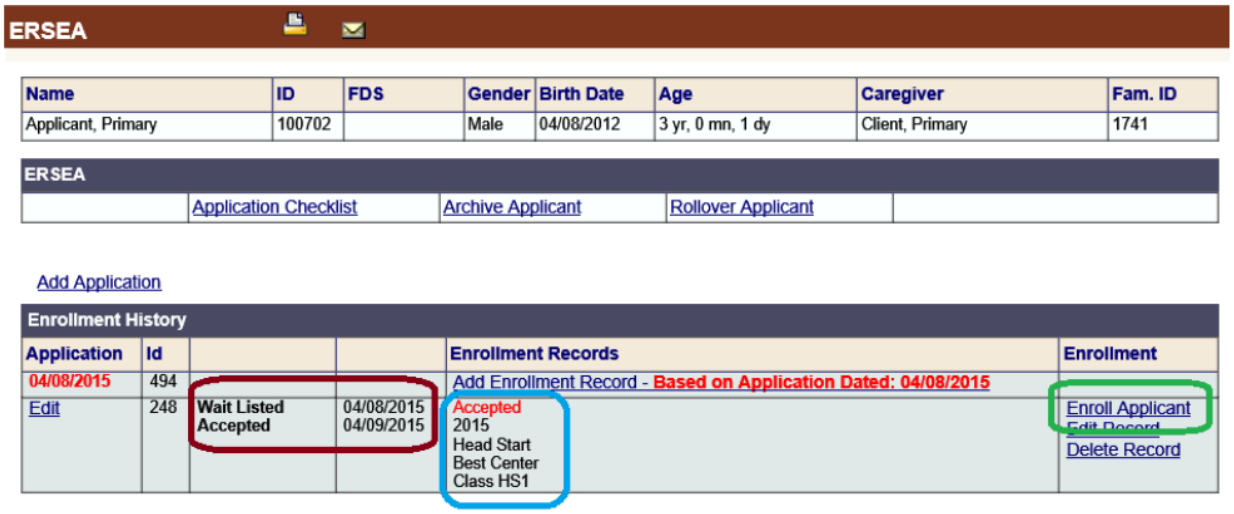
Previously, a classroom was not entered for waitlist information. The addition of classroom field into the waitlist record will populate the Waiting List-Class Based report. Waiting List report link has been removed*



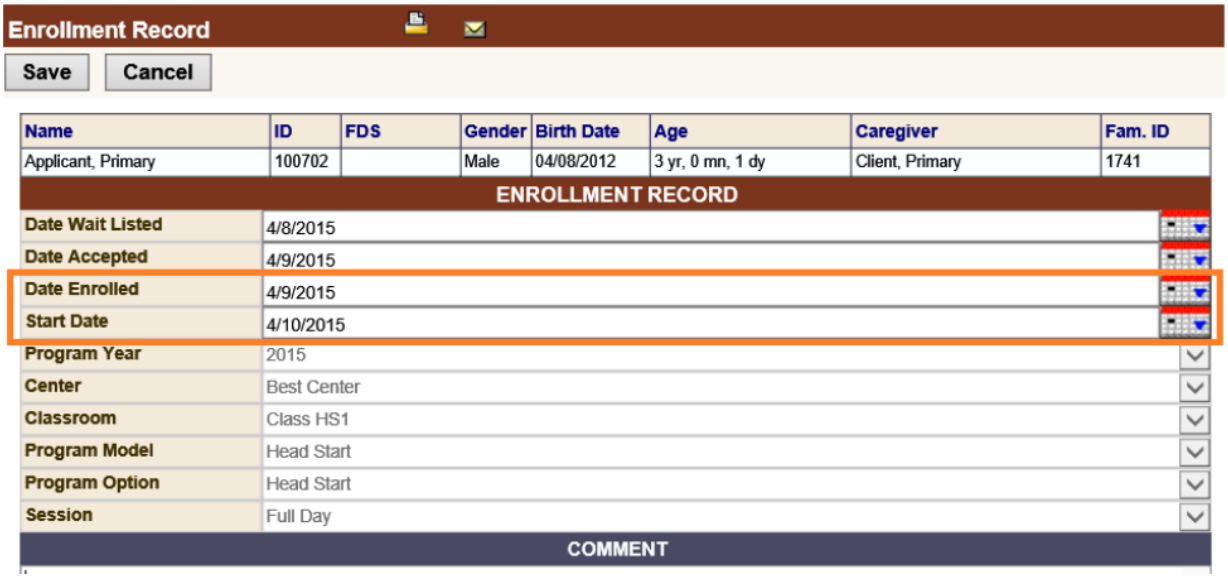
Once the wait list information is saved we have 3 links appear under the enrollment column and the delete link disappears from under the application column. Clicking on the delete record link will delete the enrollment history row. Clicking on the edit record link will take you to the wait list information page.



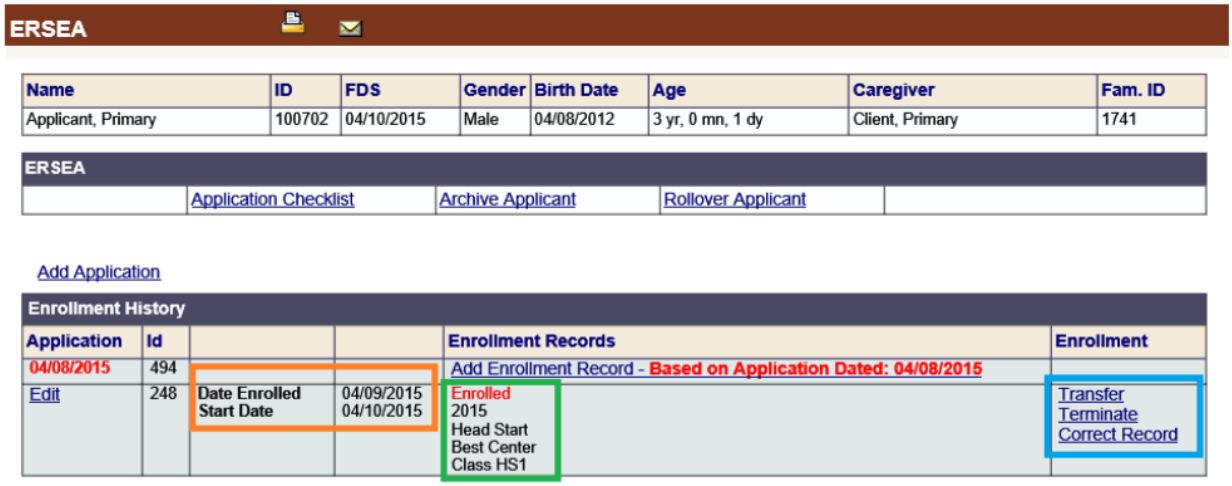
In keeping with the ERSEA steps, you will accept the applicant by entering the date accepted.



We now see a record with the status dates, accepted status and the enroll applicant link. The edit record and delete record action can be used during any stage of the enrollment.



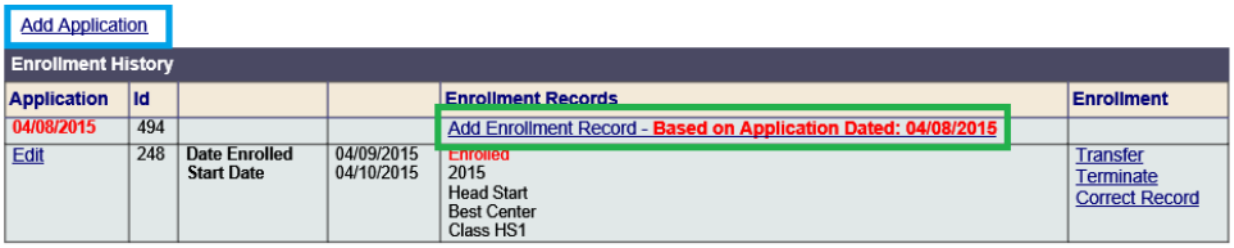
To continue the enrollment, click on the enroll applicant link and enter the date enrolled and start date.



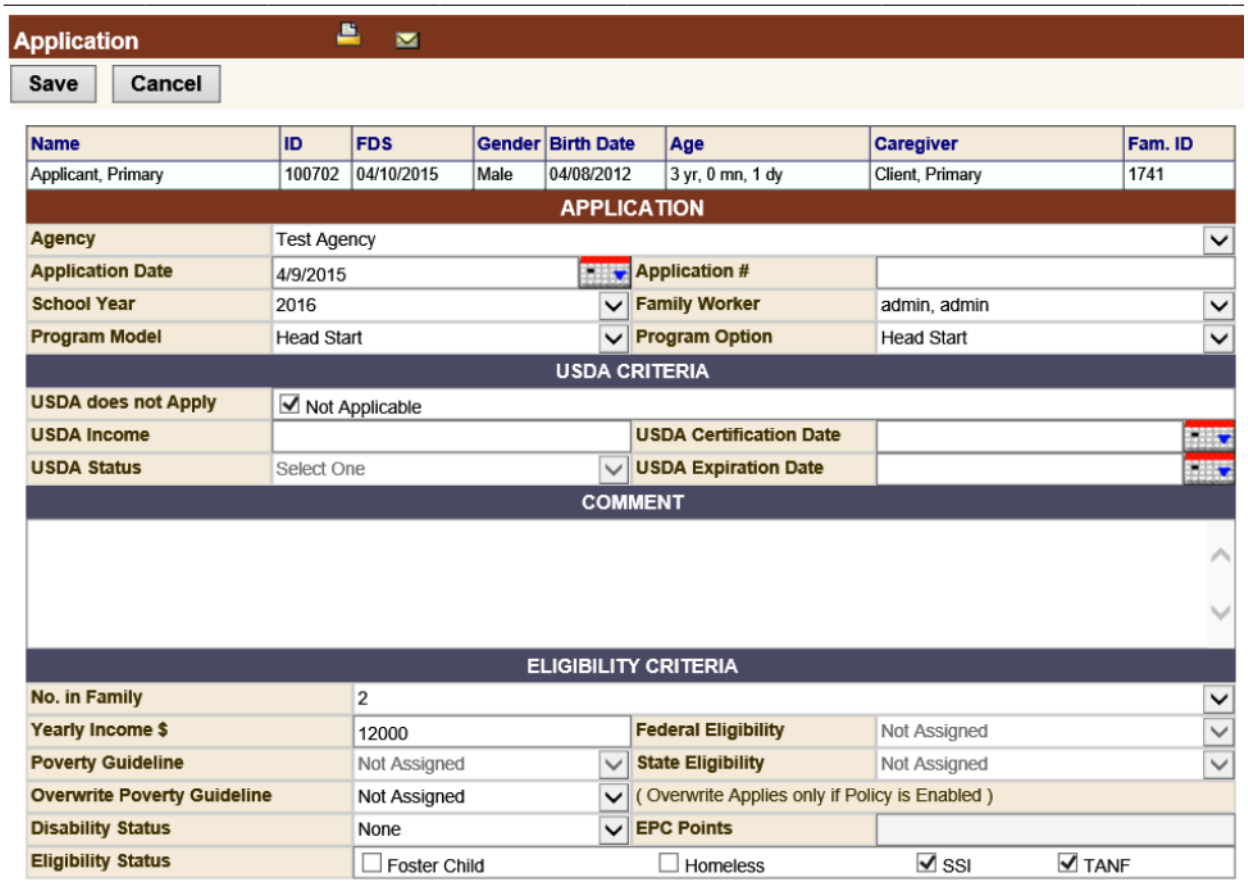
The wait list and accepted dates are replaced by date enrolled and start date information. The enrollment status has changed to enrolled. The links under the enrollment column are now replaced with the traditional transfer, terminate and correct record links.

ERSEA Changes > Workflow Changes > Wait-listing for the Upcoming Year

To the agencies that wish to place a currently enrolled applicant on the wait list for the upcoming school year, you will follow these steps.



Click the Add Application Link and enter the information in the application page.



Enter the application information for the upcoming school year and save.

Add Application

Enrollment History

Application	Id			Enrollment Records	Enrollment
04/09/2015	495			Add Enrollment Record - **Based on Application Dated: 04/09/2015**	
Edit Delete					
04/08/2015	494			Add Enrollment Record - **Based on Application Dated: 04/08/2015**	
Edit	248	**Date Enrolled** **Start Date**	04/09/2015 04/10/2015	Enrolled 2015 Head Start Best Center Class HS1	Transfer Terminate Correct Record

You will now see a new enrollment row. Proceed to wait list the applicant by clicking on the Add Enrollment Record link from the new enrollment row.

ERSEA

Name	ID	FDS	Gender	Birth Date	Age	Caregiver	Fam. ID
Applicant, Primary	100702		Male	04/08/2012	3 yr, 0 mn, 1 dy	Client, Primary	1741

ERSEA

	Application Checklist	Archive Applicant	Rollover Applicant	

Add Application

Enrollment History

Application	Id			Enrollment Records	Enrollment
04/09/2015	495			Add Enrollment Record - **Based on Application Dated: 04/09/2015**	
Edit	249	**Wait Listed**	04/09/2015	Wait Listed - EPC Points : 0 2016 Head Start Real Center Room 5	Accept Applicant Edit Record Delete Record
04/08/2015	494			Add Enrollment Record - **Based on Application Dated: 04/08/2015**	
Edit	248	**Date Enrolled** **Start Date**	04/09/2015 04/10/2015	Enrolled 2015 Head Start Best Center Class HS1	Transfer Terminate Correct Record

Once the current enrollment is terminated, you can proceed to accept and/or enroll the applicant for the new school year by following the appropriate links.

ERSEA Changes > Additional Information

1. The archive applicant link/ action will pertain only to the terminated enrollment. The wait listed record will not be affected.
2. The rollover applicant link/action will pertain to applicants with only an enrollment record. Only use this link if you do not add a wait list record to a currently enrolled applicant.
    a. Ex: If the applicant has an enrollment record and a wait list record, do not use the rollover link. Proceed with the ERSEA enrollment steps listed previously.
    b. Ex: If the applicant only has an enrollment record, proceed with rolling over an applicant.
3. The “Transfer”, “Terminate” and “Correct” record links apply only in the respective enrollment record.

*** It must be made clear that this wait list functionality in ERSEA is not to be confused with having the ability/functionality to enroll an applicant into two programs simultaneously***

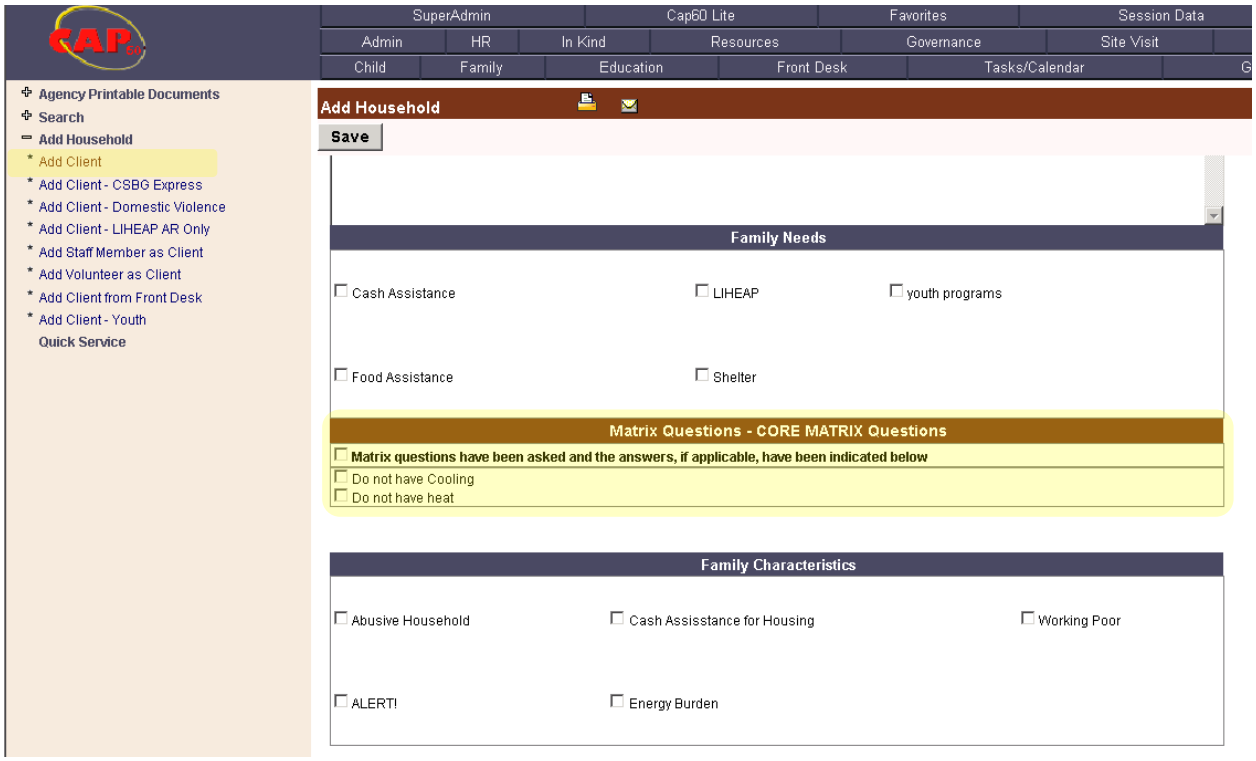
Example: an agency will enroll a child into Head Start/Part Day program and then enroll them into Child Care because the first part of the day they will be in HS and in the afternoon they will be is in child care.

Proceeding with this type of data entry will cause issues with your database in terms of attendance, health due dates, PIR and other reporting.

Self Sufficiency Matrix

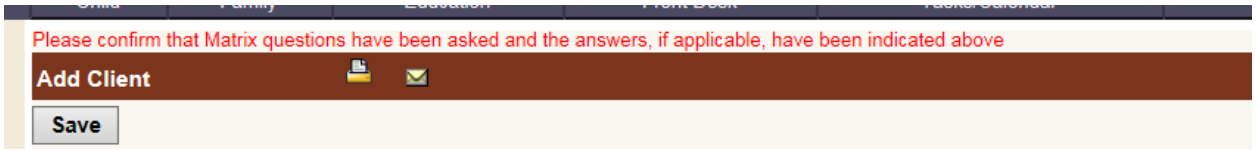
Self Sufficiency Matrix > Adding a New Household

When adding a new client you will see the Opening Matrix Questions added to the Intake process to ensure the questions are asked and answered. When clicking the “Add Client” links, near the bottom of the page you will see a “Matrix Questions” section (pictured below). Any questions answered here will follow through to new matrices opened for the household to help reduce the risk of improperly answered matrix questions. It is important that the questions be answered accurately as CSBG NPI’s may populate based on the answers provided.



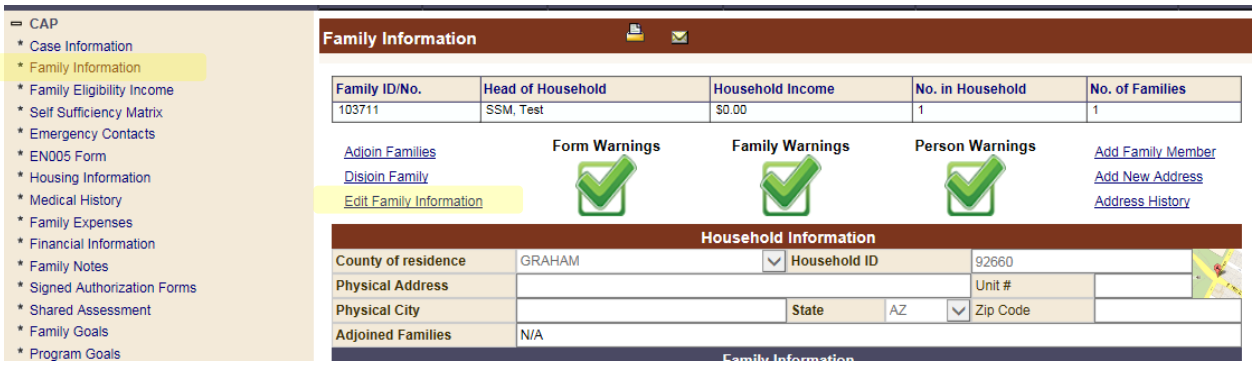
By default, the Opening Matrix questions will not appear on the intake in the CAP60 system as some agencies do not use matrices but once a Matrix is set to appear on the Intake page, answering the questions will become required by your case workers.

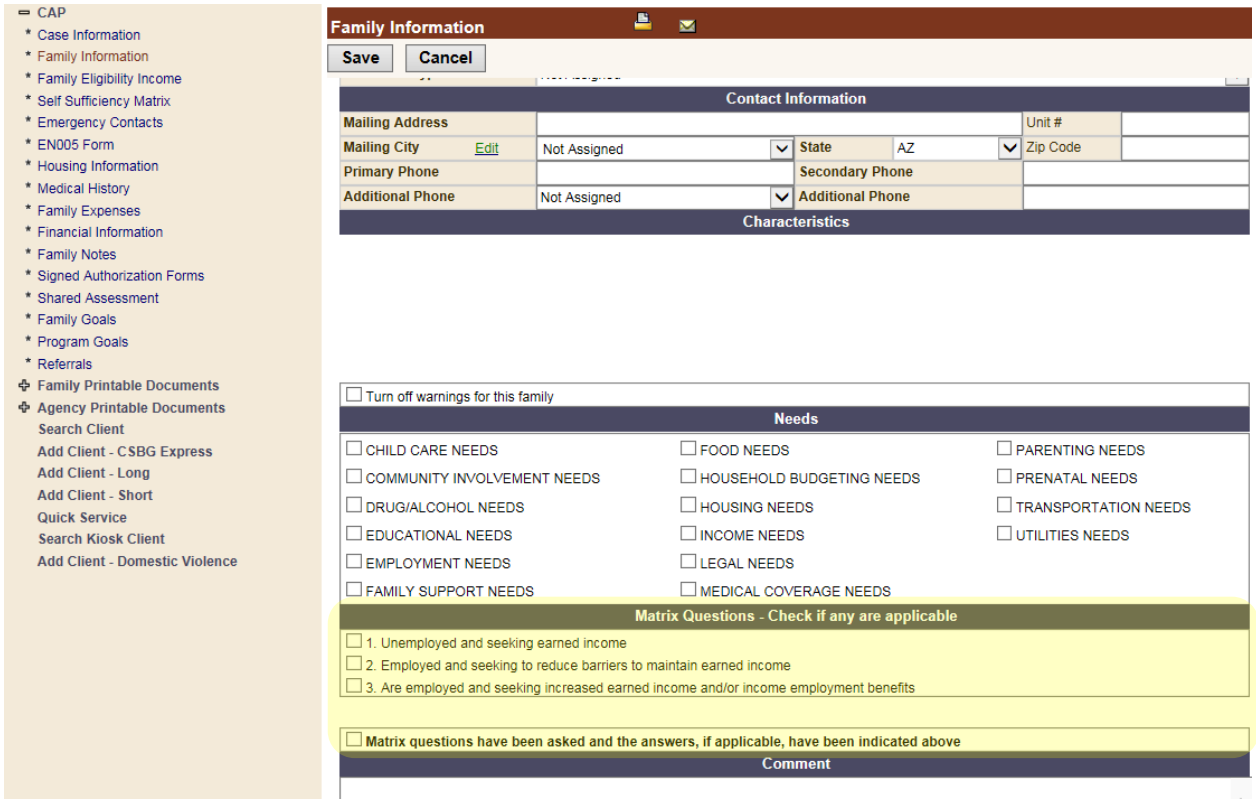
It is not required that any of the questions be answered with a check because some household may have a negative response to all questions but it is required that the checkbox affirming that the “questions have been asked” is checked. If the checkbox is not checked, you will receive a validation at the top of the page that will not let you proceed until it is checked.



Self Sufficiency Matrix > Editing a Household

The same fields are visible when editing a family as well (pictured below). After clicking the "Edit Family Information" link, the Matrix Question checkboxes are again located at the bottom of the screen. As with adding a new household, you will not be able to save your changes unless the "questions have been asked" checkbox is checked.

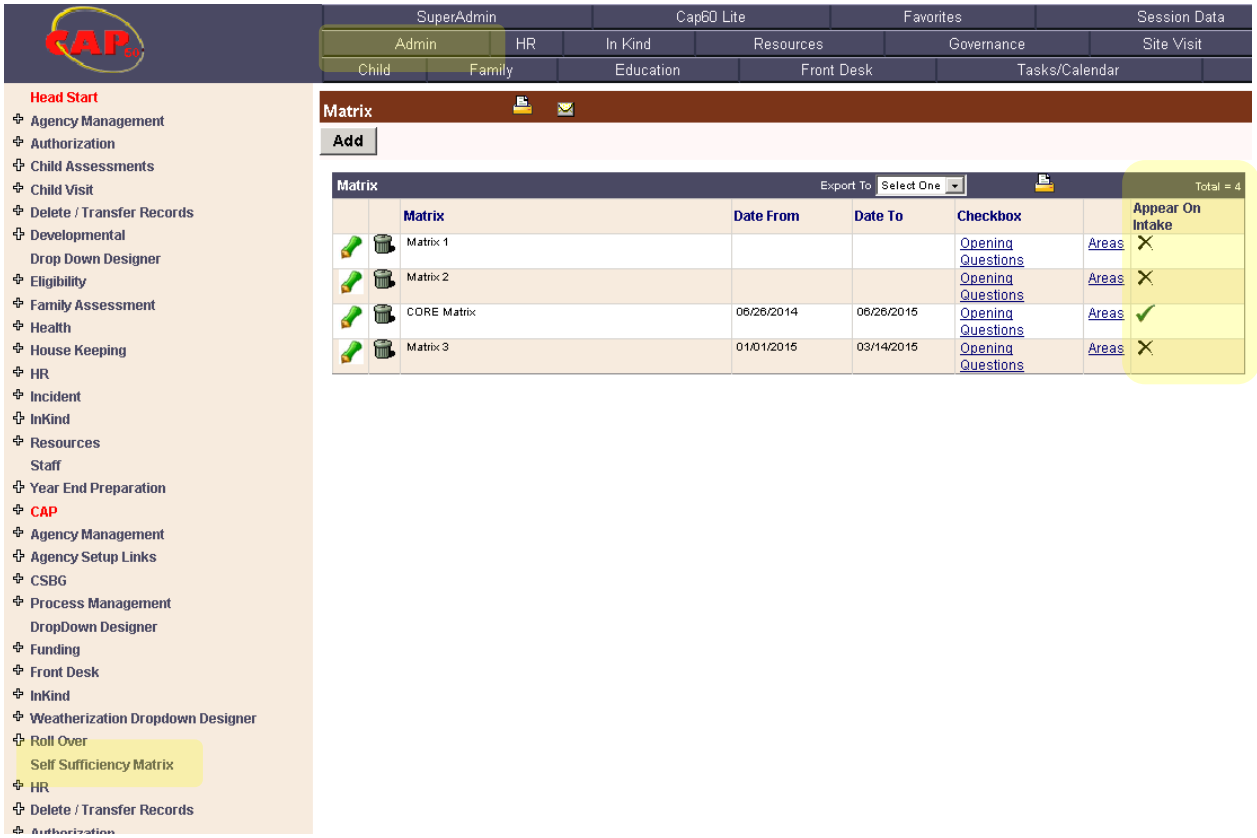




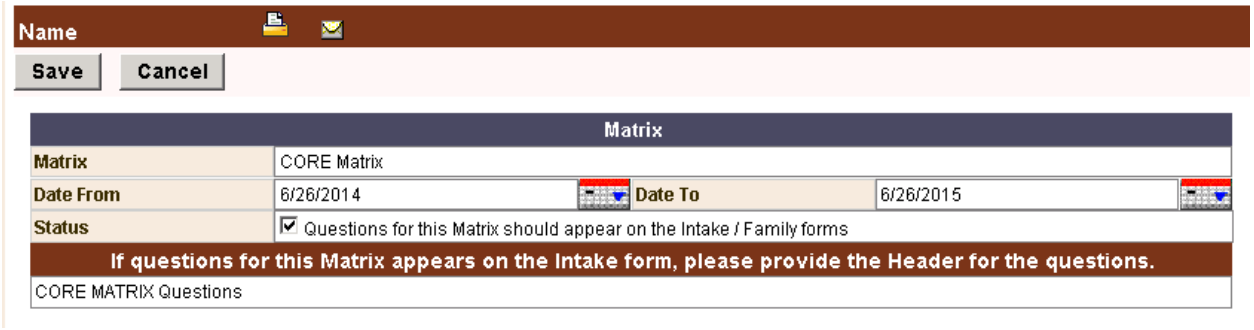
Again, any questions answered here with a checkbox will follow through to any new matrices created for this household.

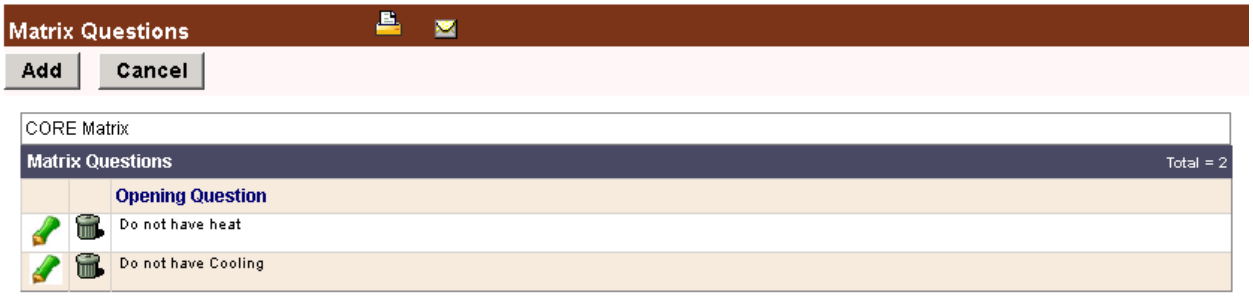
Self Sufficiency Matrix > Admin Options

The opening questions that appear on the Intake are controlled within the Admin Module > Self Sufficiency Matrix.

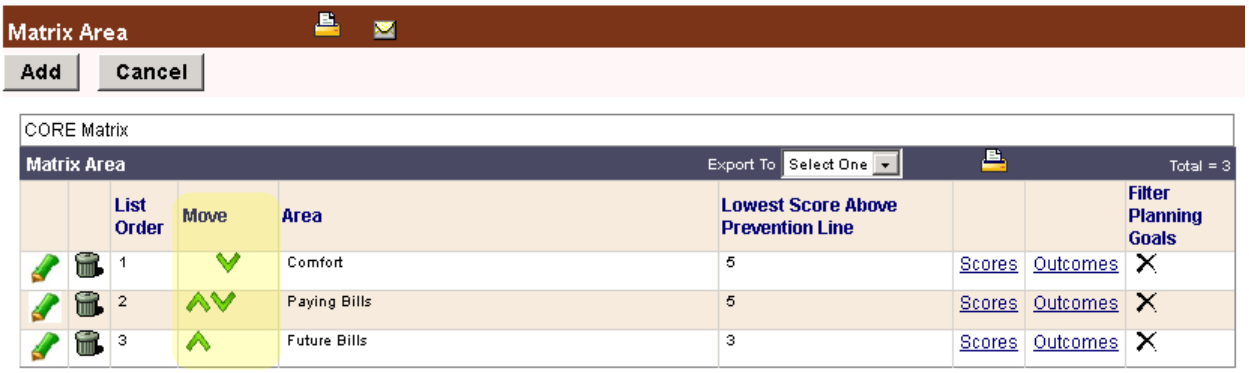


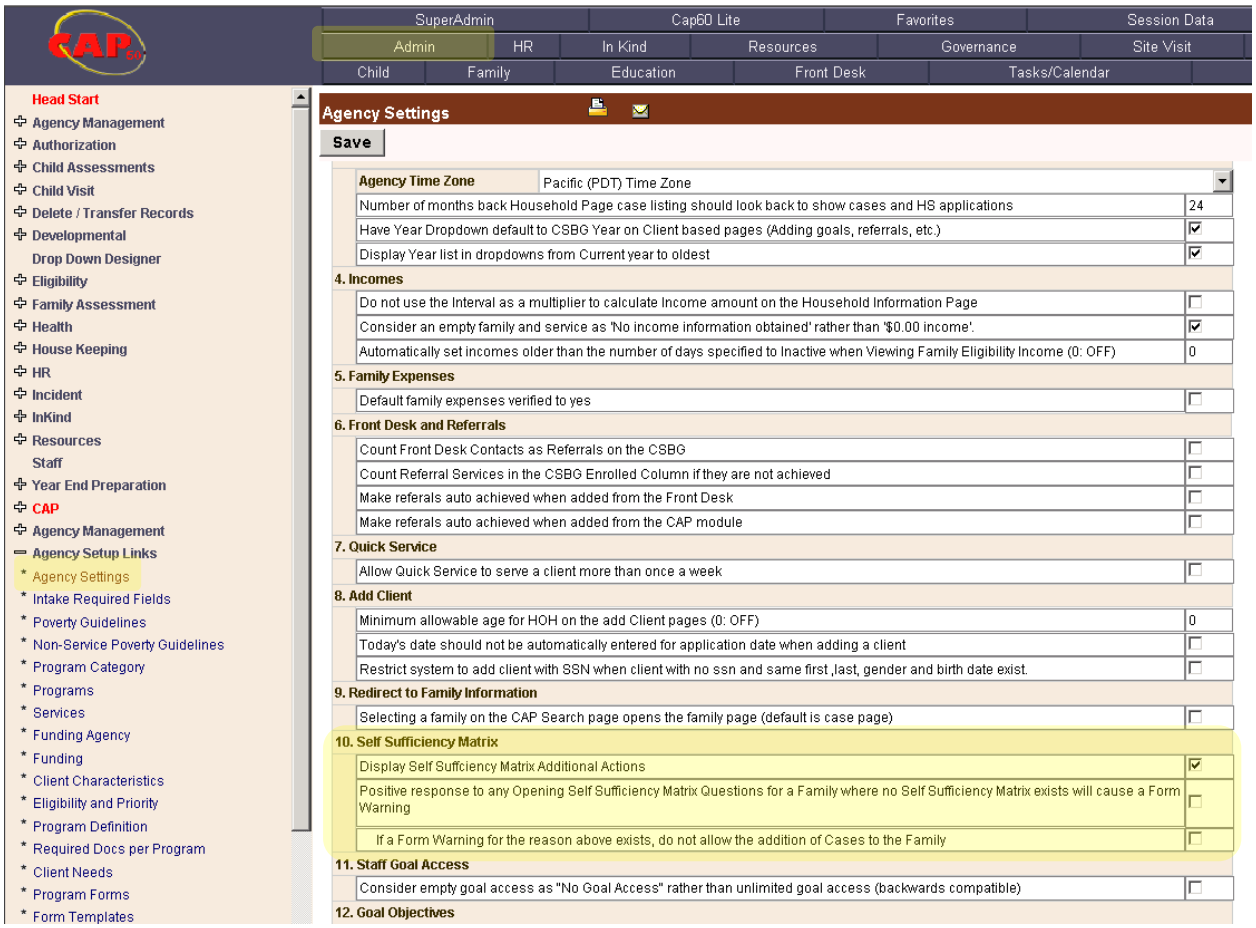
Here you can control which Matrix questions will appear on intake, the text of the questions, as well as the label that appears above the questions.





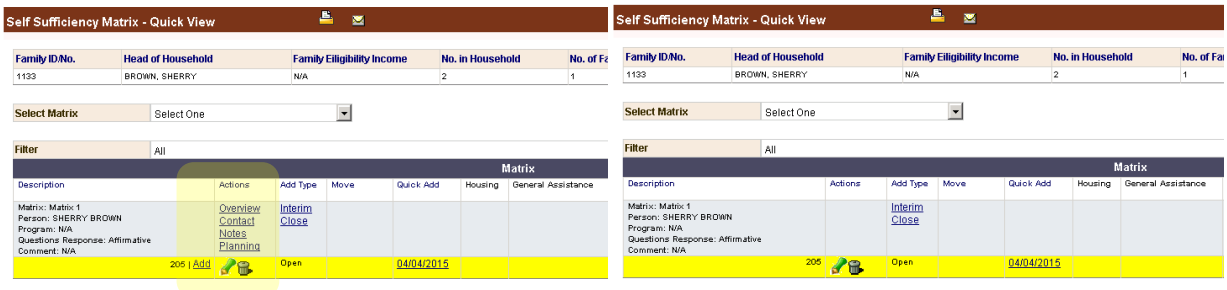
In this same section, the order the areas within a Matrix appear to caseworkers can be controlled. This will be clearer below once a Matrix is added but changing the order is achieved by clicking the up and down arrows next to the name of the area in the “Move” column.



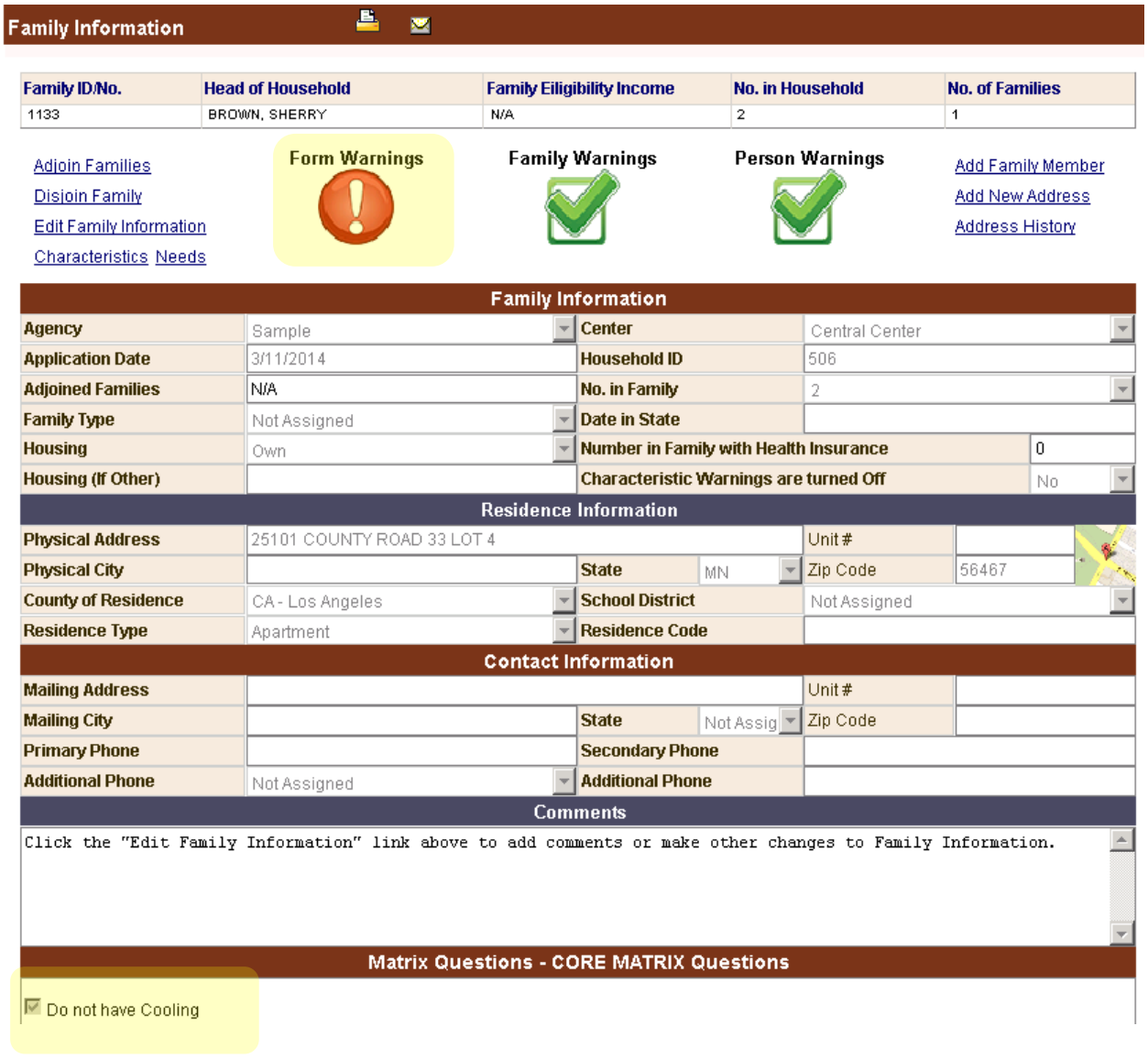


You can control the settings of Opening Matrix questions by going to Admin > Agency Setup Links > Agency Settings. There are three options available:

a) **Display Self Sufficiency Matrix Additional Actions** – this controls whether case workers have access to the detailed Score page, Planning, Contact, and Notes sections of the Self Sufficiency Matrix. Below are two snapshots, one with Additional Actions available and the other without.



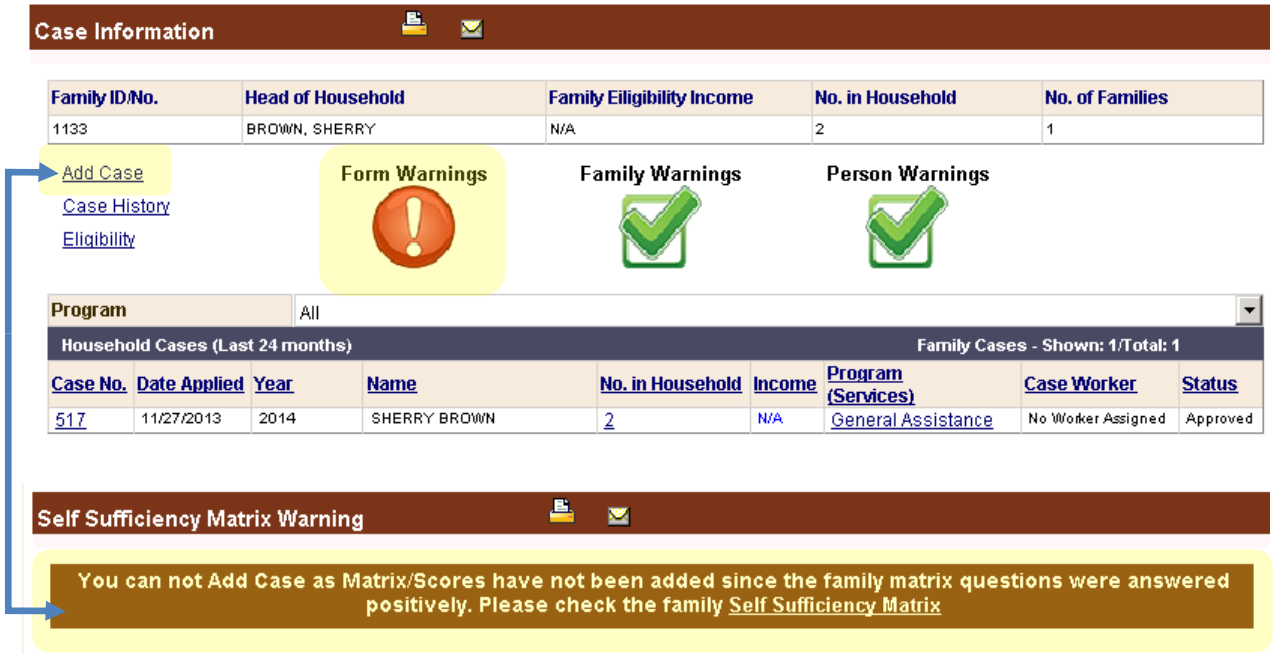
b) **Positive response to any Opening Self Sufficiency Matrix Questions for a Family where no Self Sufficiency Matrix exists will cause a Form Warning** – this option will cause a warning on the Family and Case pages when one or more Opening Questions were answered positively but a Matrix is not open for the family. This option is for agencies that want to **warn** caseworkers to complete a Matrix for vulnerable clients.



Once a matrix of the type that was set as the Intake Matrix is open, the warning will go away. At this time there is not enforcement on what scores must be added to the matrix.

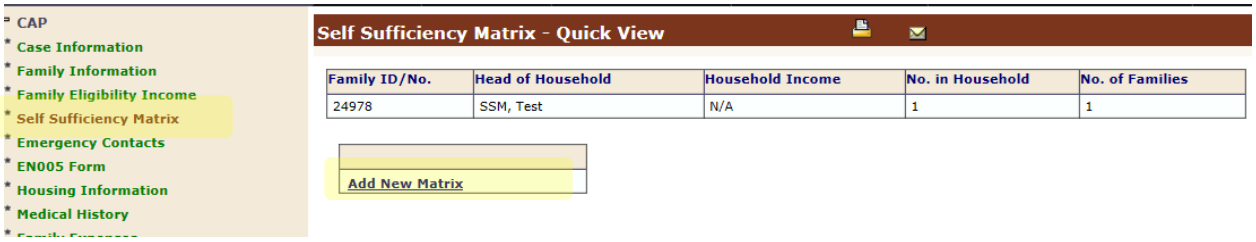
c) **If a Form Warning for the reason above exists, do not allow the addition of Cases to the Family –** this option will actually stop caseworkers from being able to add cases and services when one or more Opening Questions were answered positively but a Matrix is not open for the family. This option is for agencies that want to **force** caseworkers to complete a Matrix for vulnerable clients.

This is considered a sub option to the one above, because it may become confusing to case workers if they cannot add a case but are not seeing a warning. It is recommended that this be used in conjunction with the option above. When the "Add Case" warning does appear, they will be redirected to the Self Sufficiency Matrix page.

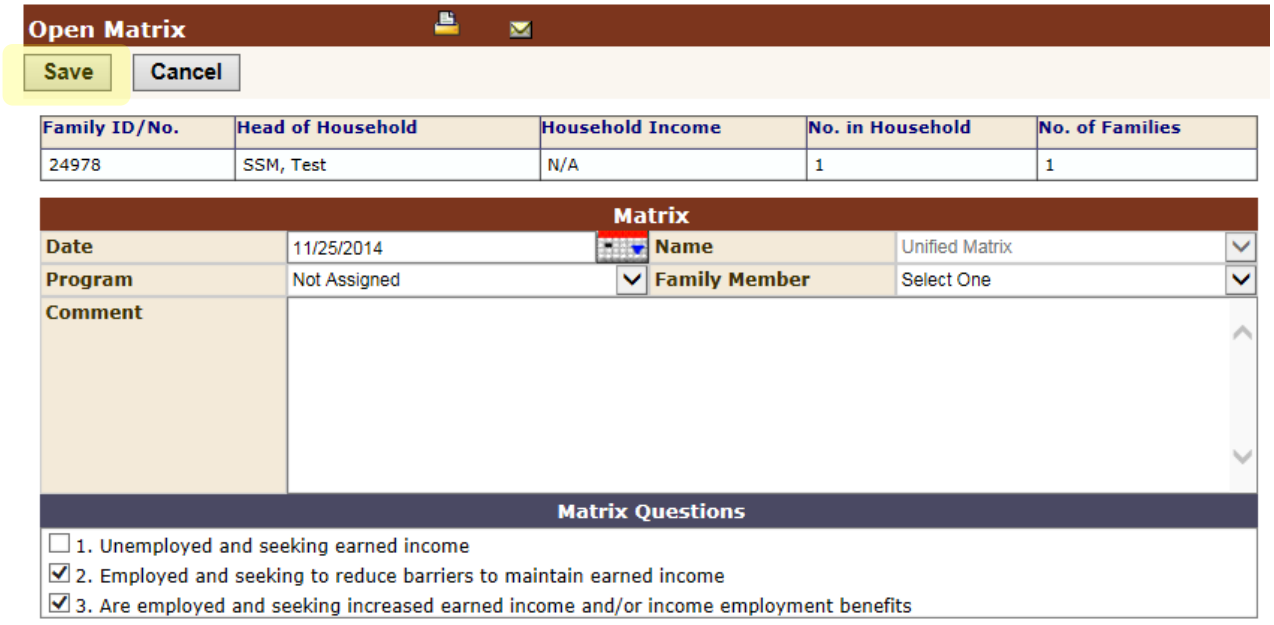


Self Sufficiency Matrix > Adding a New Matrix

To add a matrix to a household, click the "Self Sufficiency Matrix" link in the navigation bar on the left. You will be taken to the "Matrix – Quick View" page which will list all matrices and their scores for the family selected. Depending on the existence of other matrices, you will be provided a link with the appropriate action ("Add New Matrix", "Add Interim Matrix", "Add Close Matrix").

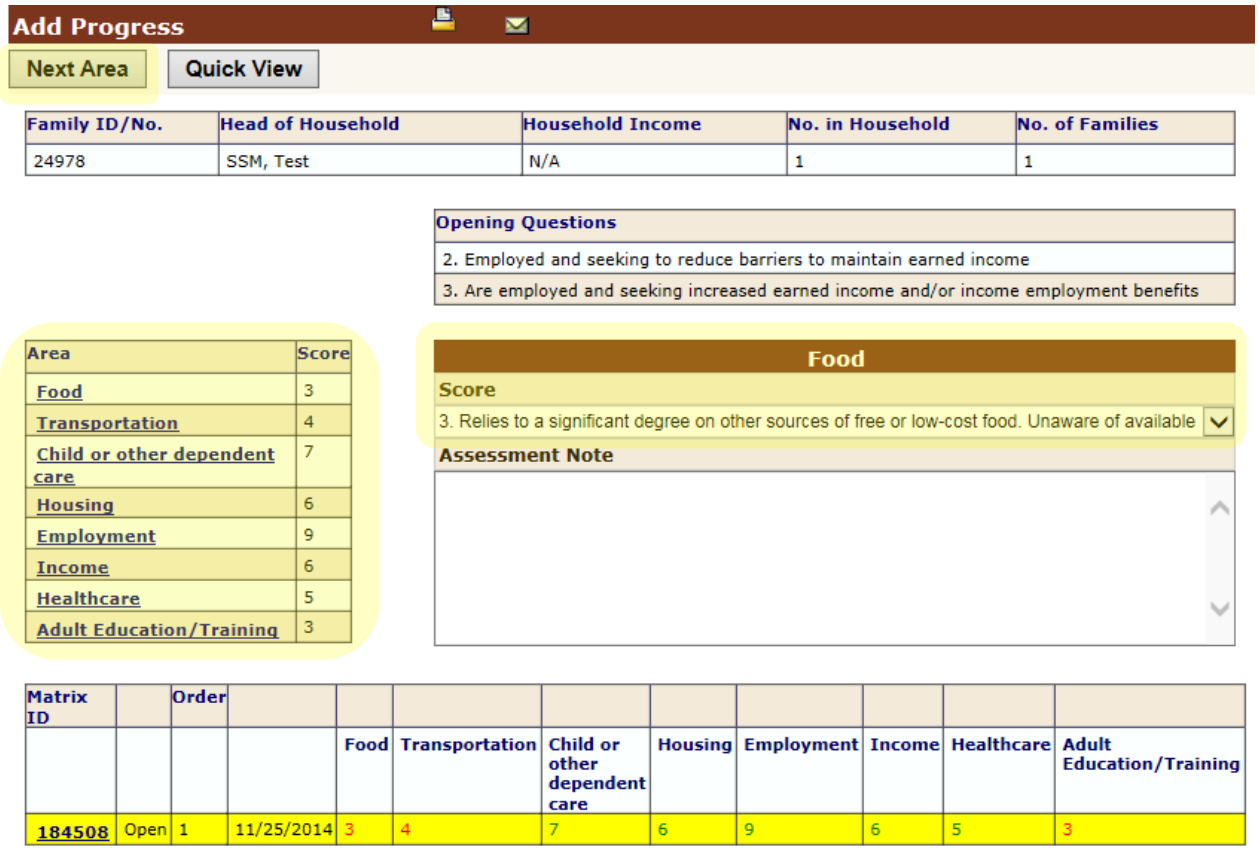


After clicking the "Add New Matrix" link, you will be taken to the open matrix page (pictured below). Here the questions will be pulled from the family you are in if adding the Matrix that appears on Intake but you may change them if needed. A "Family Member" must be selected as well as the "Date" the matrix is opened. Date is important as any NPIs mapped to scores will be based on this date. "Program" is not required but is used as a filter on some matrix reports.



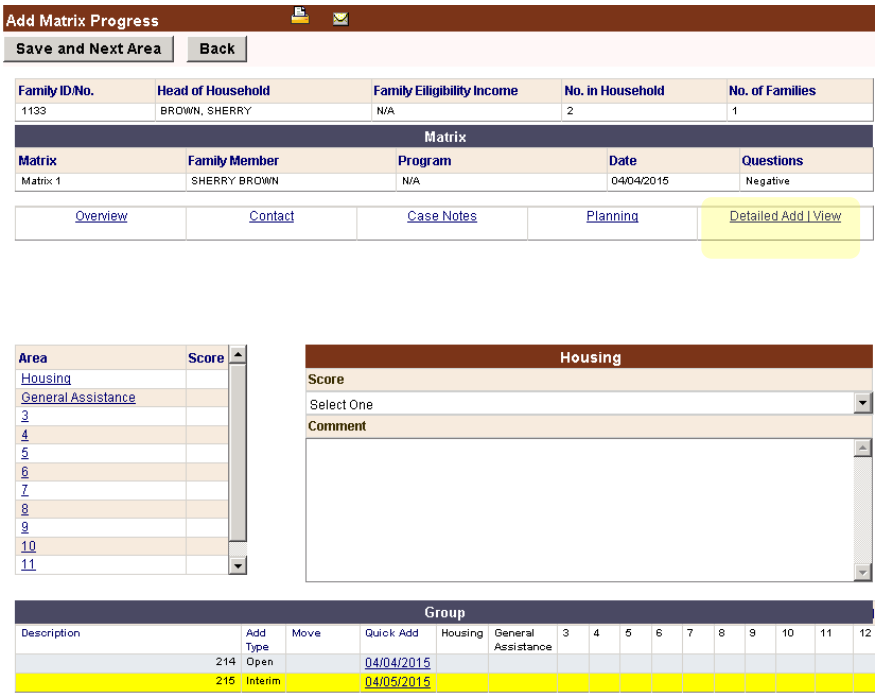
Self Sufficiency Matrix > Adding Scores

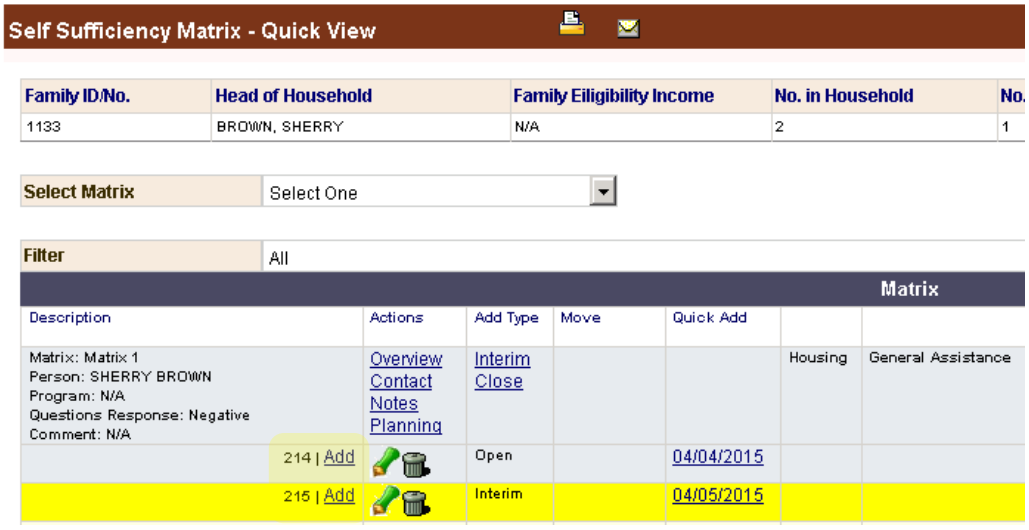
After clicking “Save” you will be taken to the “Add Progress” page (pictured below). Here the first area will be automatically selected for you and displayed in the red label as set in the Admin section described earlier. Select the score that represents the family situation, the note is optional, and click “Next Area”. This sequence of steps will progress through all of the Matrix areas, eventually looping back to the first area.



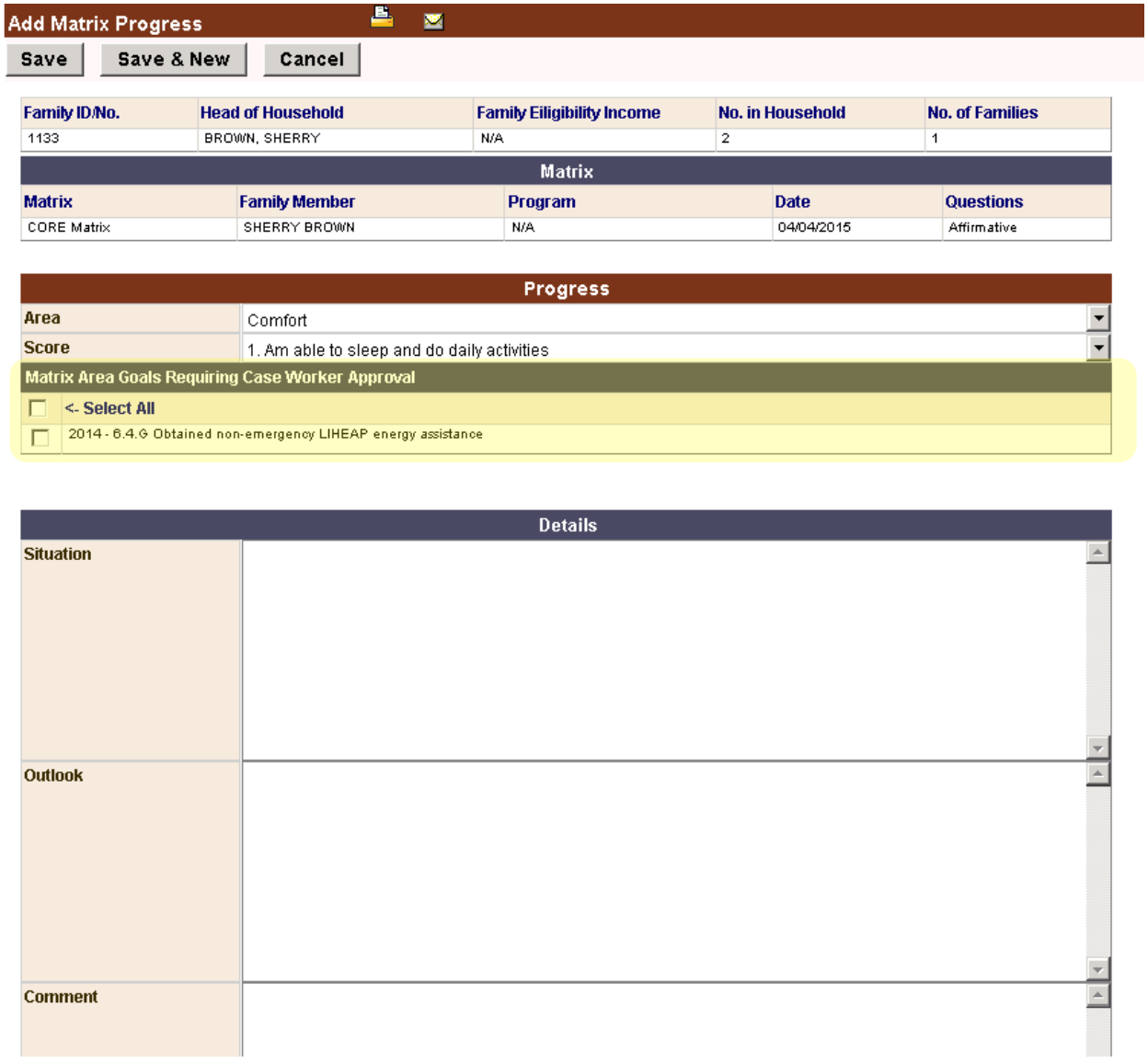
As you add scores you will see them appear below in the “Matrix Group” listing. Scores in red are below the prevention line while those in green are at or above the prevention line. You may jump between areas within a matrix by clicking the area name in the Area navigation listing on the left side of the page. If a score exists in a jumped to area, that score will be displayed, otherwise you will have to select a score before being able to click “Next Area”.

Some agencies have defined score specific goal lists for caseworkers to choose from or prefer to add additional details to a score beside a Comment. This can still be done by clicking the “Detailed Add” link or the “Add” link on the left side of the “Quick View” page.





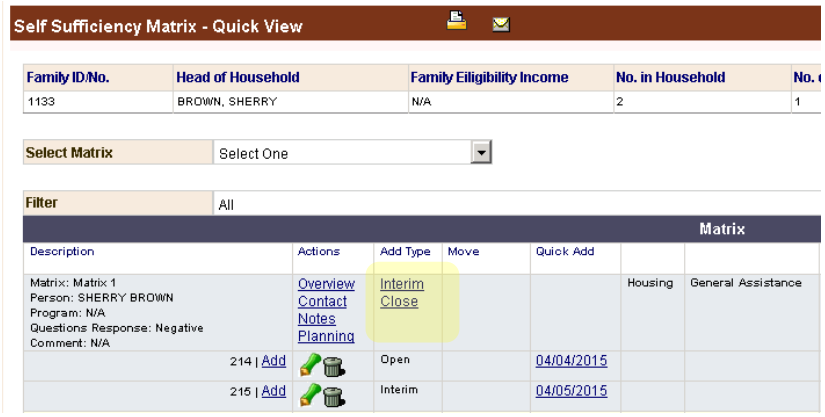
Clicking that link will take you to a similar page to versions prior to 191 pictured below. Much like the regular score Add page, clicking “Save and New” will automatically cycle through the Matrix areas in the order set by the Administrator. Moreover, as scores are added to each area, the list of areas will not include those already added to the current matrix because a given matrix can now only hold one score per area.



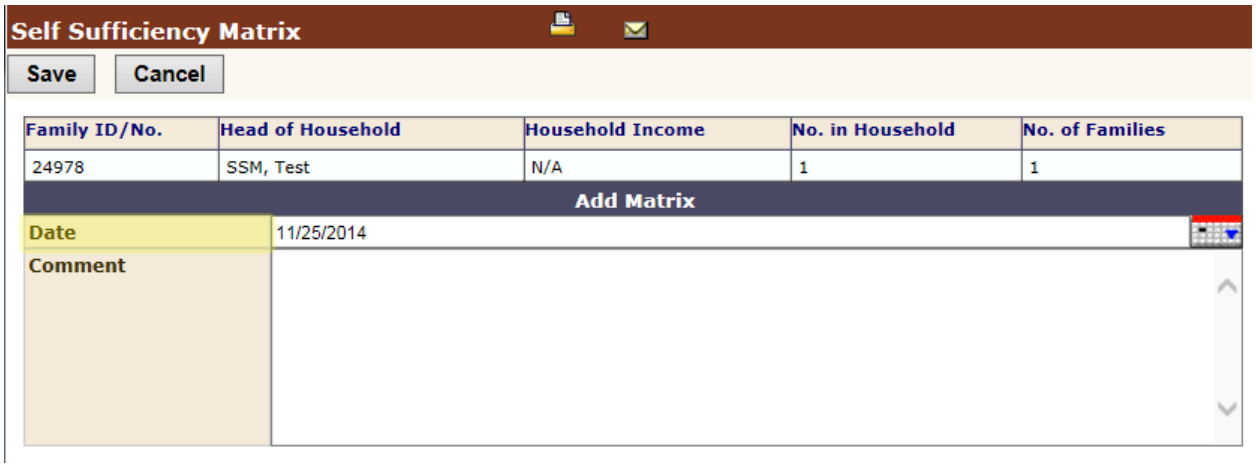
You can edit or view the details of a score by using the “Detailed View” link pointed out earlier or the “Overview” link. The “Overview” has not changed from the previous version and will not be discussed here but it will continue to show the first and most recent scores per area.

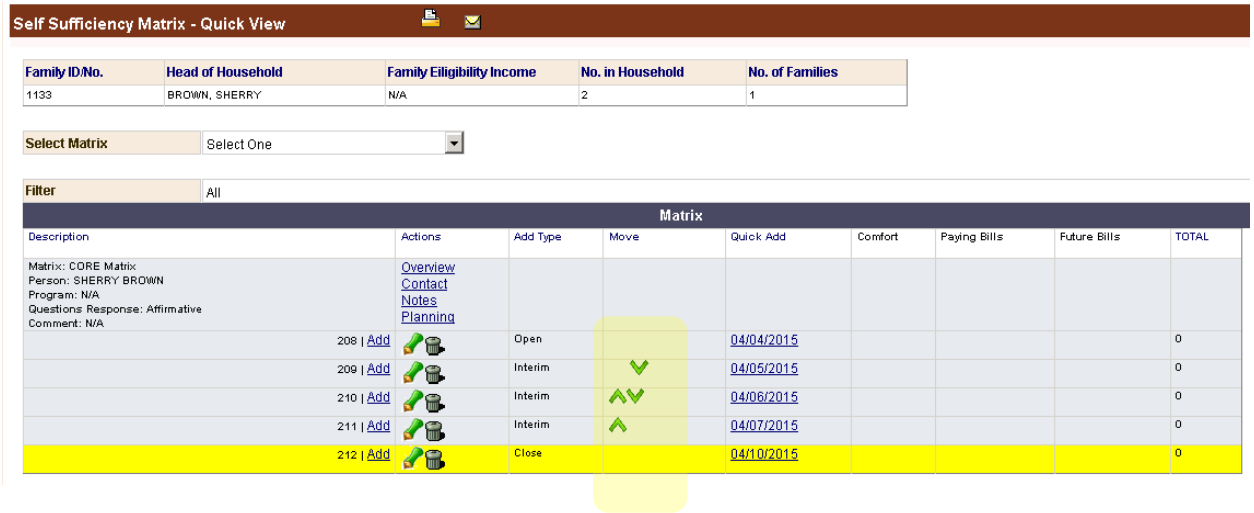
Self Sufficiency Matrix > Adding Matrices to a Group

We have replaced the Score "Time" with matrix groups to make entry easier for caseworkers. The order that a matrix appears within a group tells us the "timing" and order of the scores within the group. Matrices are considered in a group as long as the matrix is not closed. To add additional matrices to the group, you may select "Interim" or "Close" on the "Quick View" page. Closing a matrix will end the group.



When adding an "Interim" or "Close" matrix, only the Date is required (pictured below). Again you will be taken to the "Add Progress" screen with the current matrix highlighted in yellow. It is important that more than one matrix be in a group for NPI reporting purposes because it takes at least one score to enroll someone in an NPI and at least one more score to achieve them in the NPI based on your NPI to score mapping.



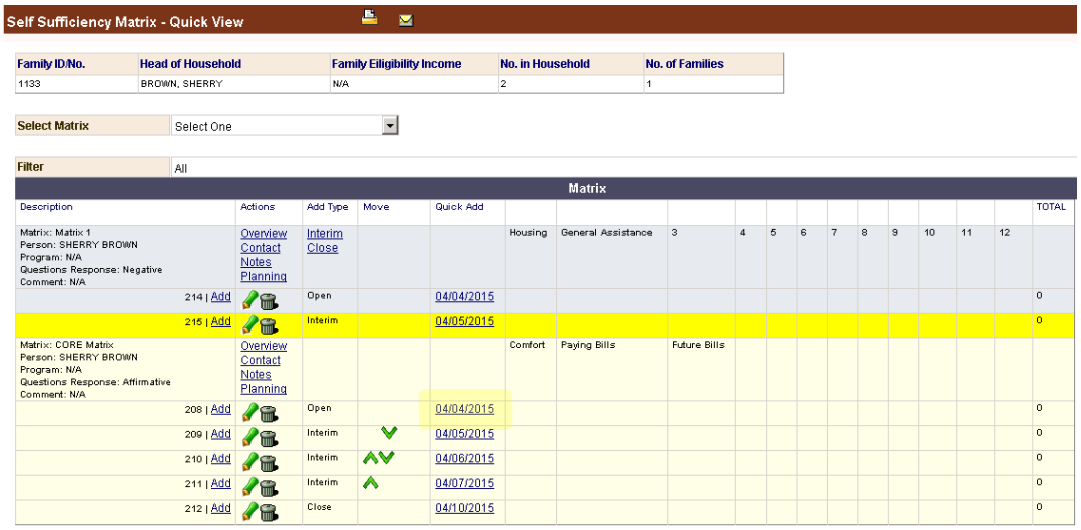


The order of the matrices within a group can be changed by clicking the up and down arrows in the matrix listing. Only “Interim” matrices can be moved and within the same group, opening and closing matrices cannot be moved.

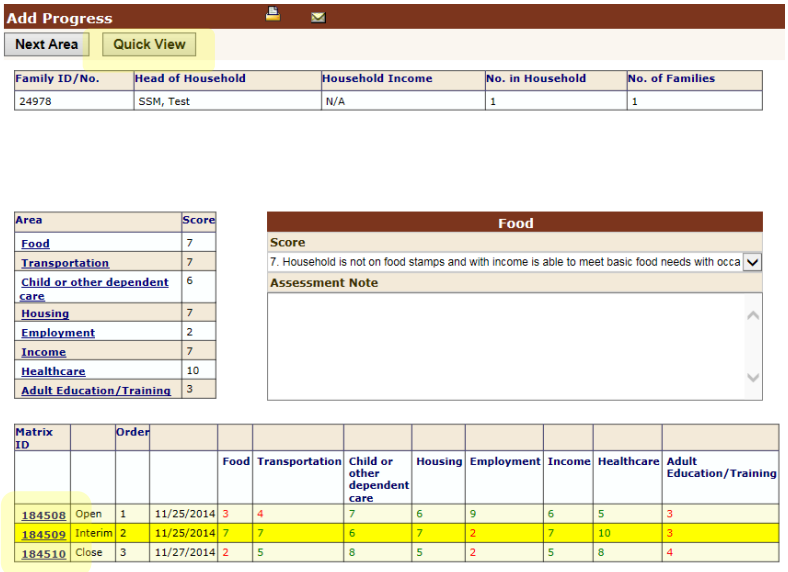
You may only have one unclosed matrix of each type at a time, if you would like to create a new open matrix for a family with an already unclosed matrix of the same type, you must close it first. There is no limit to the number of interim matrices you can add to a matrix group but it is recommended that a new matrix be added at least once a fiscal year as the NPIs associated with the matrix scores may change from year to year.

Self Sufficiency Matrix > Moving between Matrices in a Household

If a family already has existing matrices you may view or edit them in two ways. When viewing the "Quick View" page, you will see all of the matrices that exist of this family. The matrix groups are separated by color, either light yellow or blue, for easier navigation. Simply click on the Matrix Date you would like to view or edit to jump into both that matrix as well as the matrix group.



After the matrix is selected, you will once again be taken to the "Add Progress" page with the first area selected (pictured below). At the bottom of the page you will see all of the matrices within that group with the current matrix highlighted in yellow. You may also move to other matrices within the group by selecting the Matrix ID. If you would like to move to a different group, click the "Quick View" button at the top of the page.



Self Sufficiency Matrix > Older/Custom Matrices

When entering a family that had matrices prior to the v191 release, you will still be able to view and edit the matrix as before.

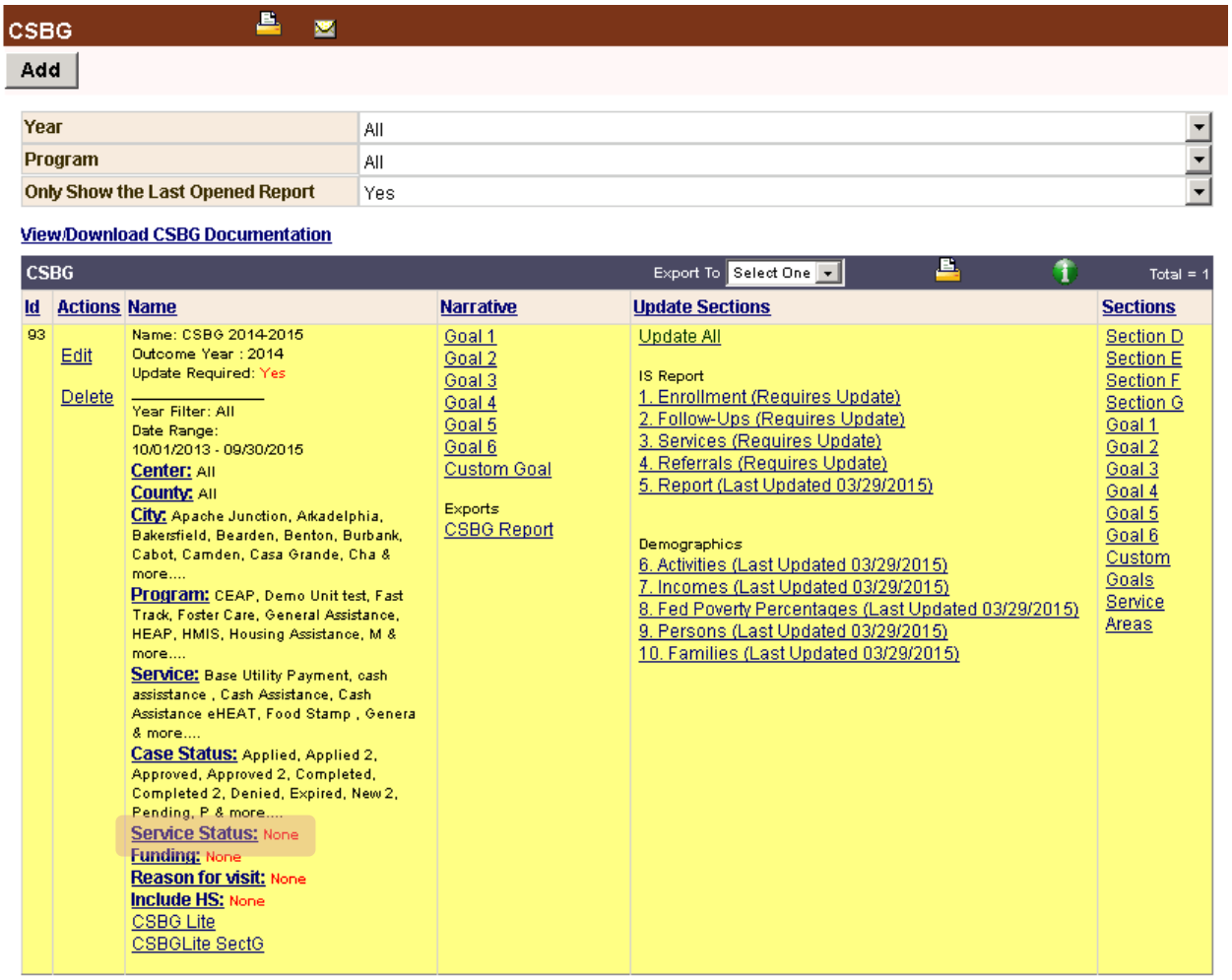
Matrix ID		Order		CHILD CARE	COMMUNITY INVOLVEMENT	DRUG / ALCOHOL COUNSELING	ADULT EDUCATION/TRAINING	EMPLOYMENT	FAMILY SUPPORT	FOOD	HOUSEHOLD BUDGETING
56	Open	1	08/06/2014					5			5
375	Interim	2	08/06/2014				5				
376	Interim	3	08/06/2014								
377	Interim	4	08/13/2014	7							
378	Interim	5	08/13/2014			9	5		3	3	
379	Close	6	08/13/2014		1						

Previously the matrix scores required a time to determine the order of the scores which were used to populate various NPIs as multiple scores per area could be added to a single matrix. Due to the fact that the new matrix no longer uses time because you can only add one score per area per matrix, we migrated those old scores into new matrices based on the times that were saved on the scores.

In the image above, you can see some scores were places in the same matrix while others were not. This is due to the time that was saved on those scores. Although it looks like the scores are scattered, this has no effect on the actual progress or reporting of the matrix as the order was maintained and now in several interim matrices which have their own order.

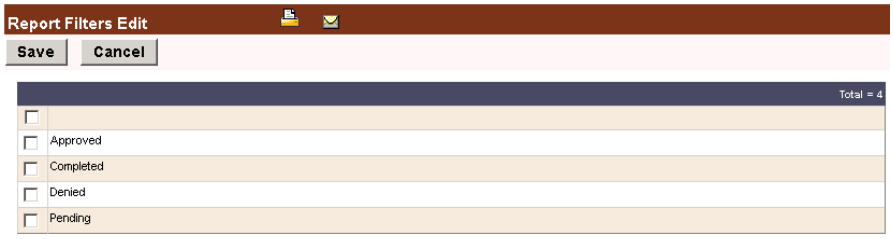
CSBG Changes

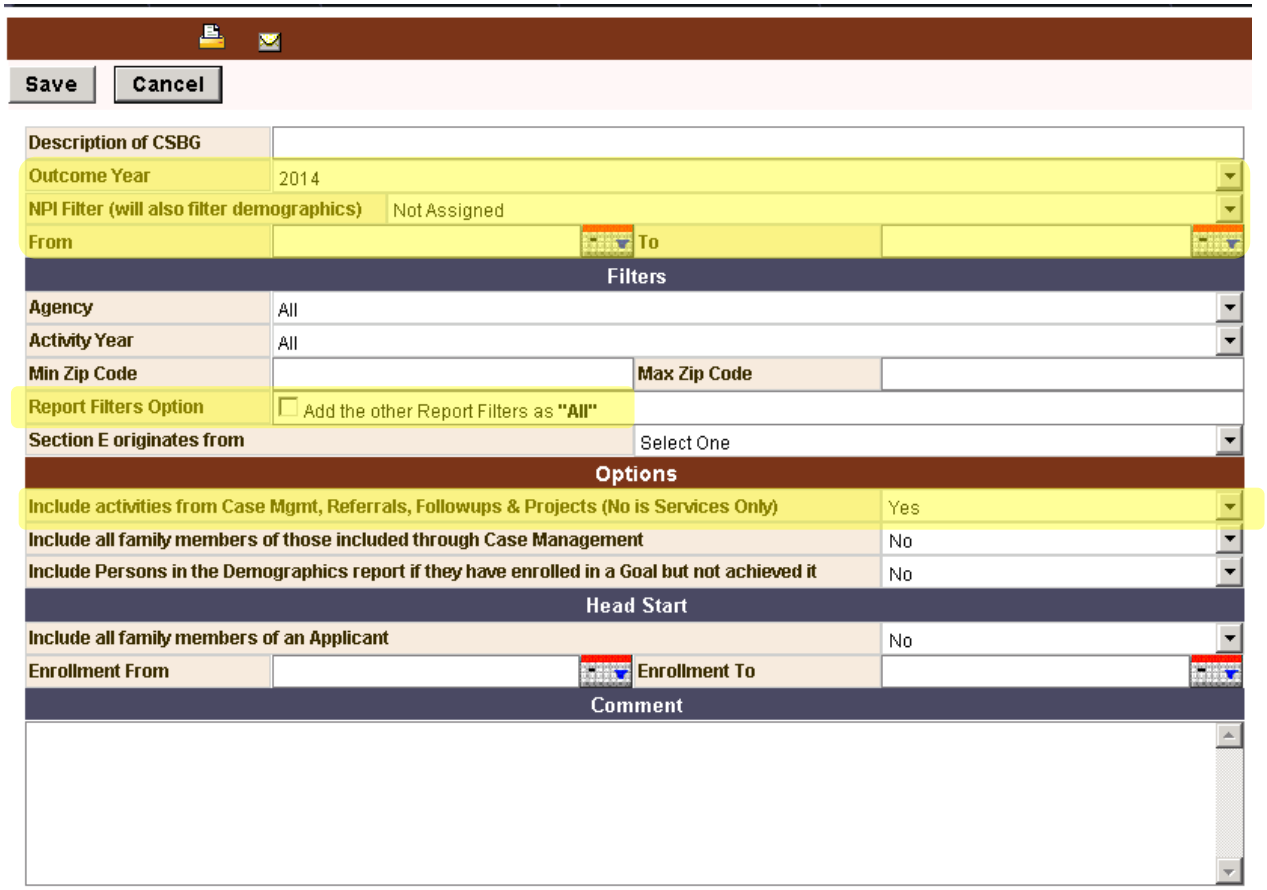
CSBG Changes > Filtering



The first thing you will notice when viewing or creating a CSBG report are the new filtering options. The CSBG report can now be filtered like the demographics report update in v1.90. The report now allows you to choose more than one of many of the options such as Programs, Services, Funding Sources, etc.

By clicking one of the blue links, such as the “Service Status” dropdown, you will be taken to a page like the below where multiple options can be selected.





Other Changes to the CSBG filters:

1) **Outcome Year:** You must now select an outcome year for the report. This was added for multiple year reports which will be discussed later. The outcome year refers to which set of NPIs you would like to see on the report from the Admin > CSBG pages. Moreover, "Date From" and "Date To" are now required while the "Activity Year" can be used in conjunction with the dates for additional filtering.
2) **NPI Filter:** There is now an option to filter the report down to a single NPI. While this doesn't make for an entirely different NPI report, other than only that one goal will appear, it does filter the demographics of the report. This allows you to view the Section G for the clients that achieved a specific NPI.
3) **Add the other Report Filters as "All"**: Like the demographics report, this will automatically add all of the programs, funding sources, services, etc. to the report. You can always add and/or remove options after a report is created, but this option makes most reports a bit faster to create. Notice that many of the filters previously seen on the "Add CSBG" page are now gone as they have been replaced with the links on the "CSBG List" Page.
4) **Include activities from Case Mgmt, Referrals, Follow-ups' & Projects (No is Services Only)**: This dropdown replaces the older, "Include Persons from Case Management with no Services in Section G" option. The previous dropdown terminology seemed confusing in the

way it interacted with other filters like Service Type or Funding Source. If those filters were being used then activities from Case Mgmt, Referrals, and Follow-ups would be omitted because they are not part of that Service Type or Funding Source as we don't collect that information on those activities.

This is no longer the case, if this option is set to "Yes", the report will pull those activities into the report even if there are other filters which would contradict the option. Therefore if you are looking to see activities within a specific set of parameters, you can set this option "No".

CSBG Changes > Filtering > Program Access

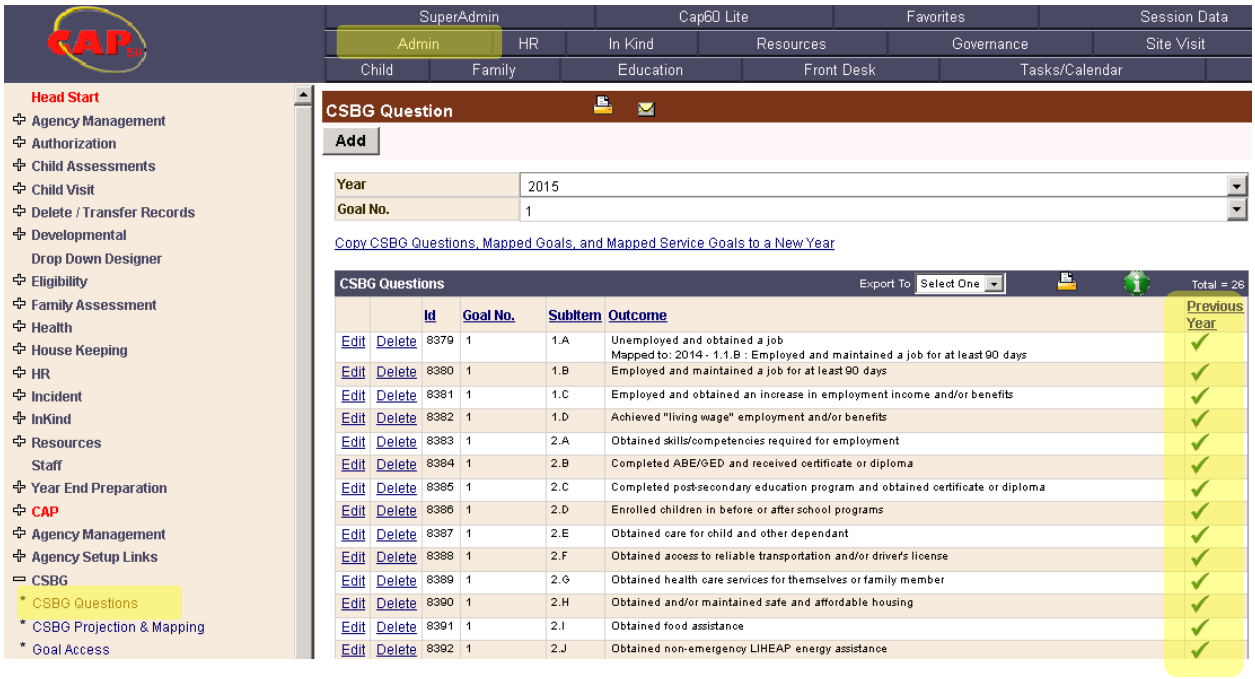
Many of the reports have program filters which can be set to "All". Previously this meant that if a user had access to those reports they could view activities from programs they do not have access to add/edit/or delete within the CAP module. Now many of the reports in CAP60 system have been updated to reflect program access meaning that when "All" is selected, they will only see the activities from the programs they have access to.

As mentioned above, the CSBG report has an "All" option when creating a new one. When "All" is selected, only the programs the user has access to will be added to the list. When editing the program list, only those they have access to will appear in the program list for adding and removing. Furthermore, the "CSBG List" is now filtered by program access as well. If a CSBG exists with a program the user does not have access to, it will not appear in the list. This is still true if the user has access to all but one of the programs selected for the report.

CSBG Changes > Filtering > Multiple Years

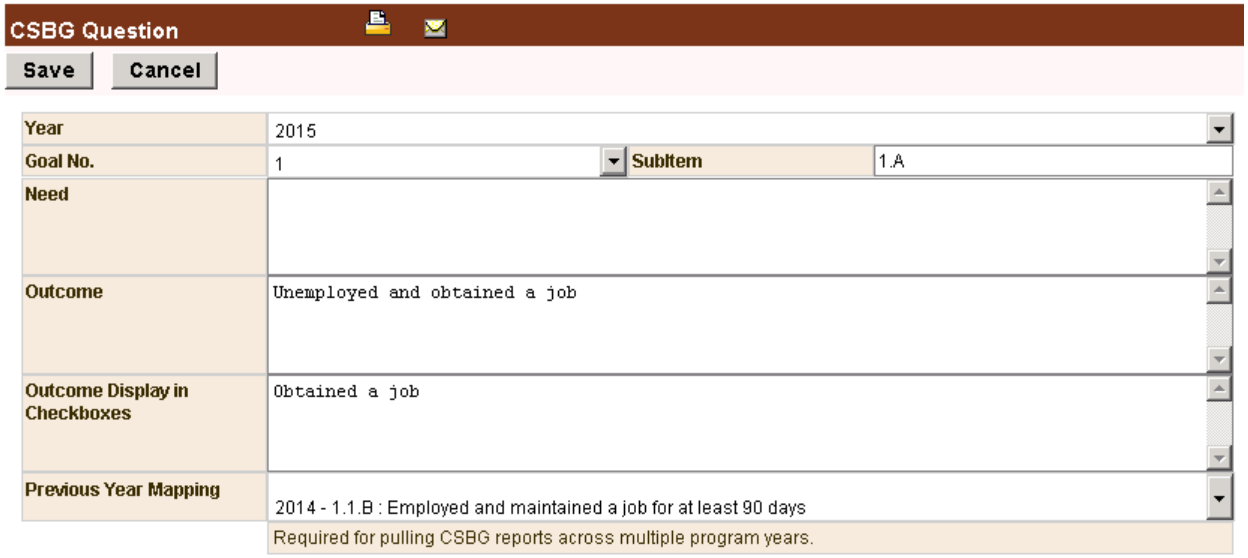
As mentioned above, the CSBG can now report across multiple NPI and Fiscal years. In previous versions the CSBG could only report across two NPI years, the one CSBG Year the date range ended in and the year before. All of this was transparent to the user, but the new "Outcome Year" filter makes it visible to the user which NPIs are going to appear in the report.

This is beneficial mostly for agencies that have fiscal years ahead of the CSBG fiscal year (very rare) but also adds the nice option of reporting on activities over a large time period. This is why the date filters have become mandatory along with the "Outcome Year" dropdown.



As with previous versions, this is accomplished via the "Previous Year" mapping under Admin > CSBG > CSBG Questions page. On the list page you will notice most of the questions have a previous year mapping as designated by the checkmark. Typically the CSBG does not get too many new outcomes from year to year, but if one was created, it would not have a previous year mapping.

In general the previous year mapping is done automatically for you when the CSBG rollover occurs. The outcome will be mapped to the outcome that created it when the rollover happens. If you like, you can change the mapping by going to the edit page and selecting a different goal. When this happens you will see "Mapped To: …" underneath the outcome to designate it is not mapped to the same goal from the previous year.

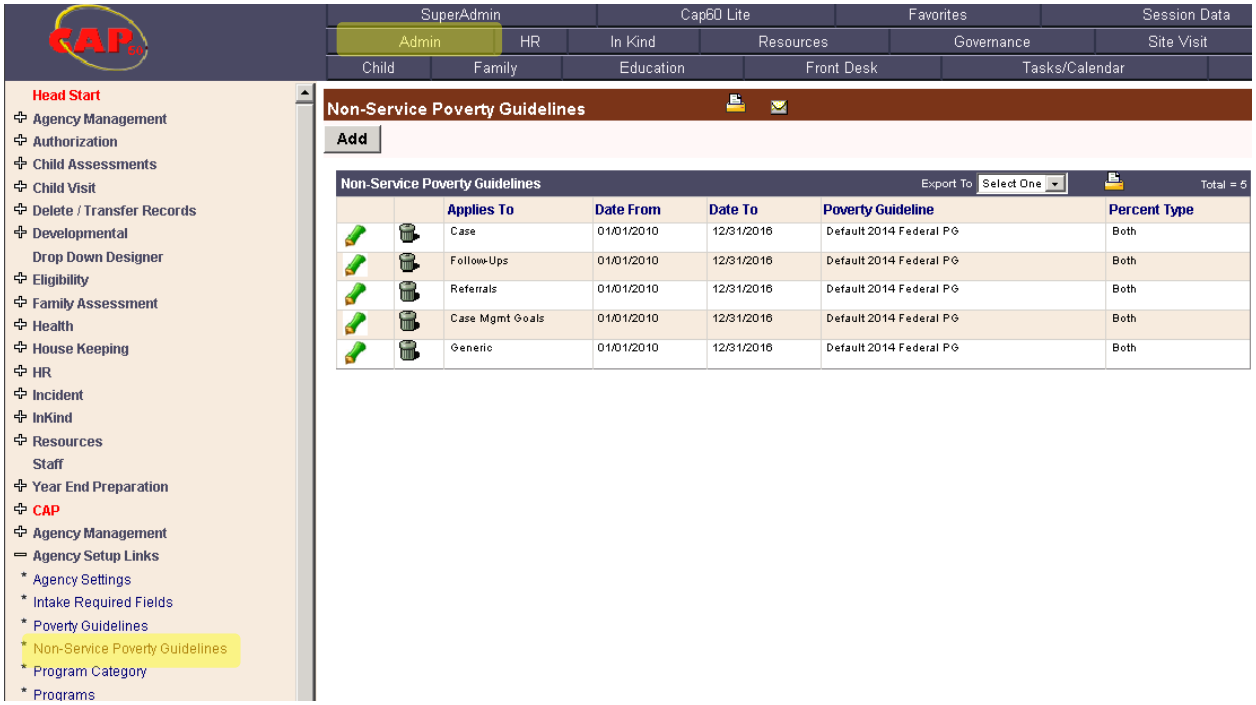


In the image above you can see that 2015:1.1.A is mapped to 2014:1.1.B. This is unusual for standard NPIs but if your agency creates any custom outcomes this may be useful. What this means is that if I created a report that is to show 2015 “Outcome Year” NPIs and spanned a date range to include 2014 outcomes, people that achieved 2014:1.1.B would also be counted in the 2015.1.1.A outcome.

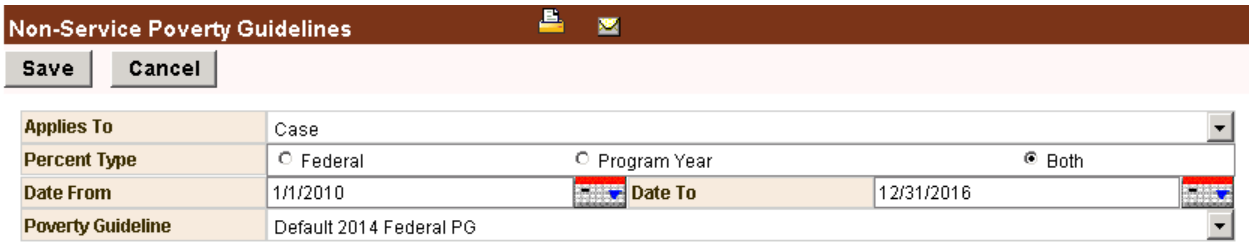
Therefore you can see that as your date range increases to include more years, backwards or forwards (you can run a 2015 Outcome Report for activities in 2016), the previous year mapping is very important. We recommend you take a minute to ensure your goals are mapped to previous years by checking to see that a checkmark exists next to the goals you plan on reporting as well as ensuring the “Mapped To: …” does not appear unexpectedly.

CSBG Changes > New Reporting Percentage Mapping

In the previous CAP60 version we introduced service income and program definition poverty guidelines to replace the saved/static poverty percentage levels. This allowed us to generate income percentages **in real time** between a combination of service, funding source, date and guideline. While this greatly enhanced reporting of poverty levels for services, we continued to use saved/static percentage levels for activities such as case management and referrals. Generally this is not an issue unless an agency changes its setup after activities have been created.



In version 1.91 we are extending that flexibility to other activities as shown above. This is mostly made possible by moving the income from the service to the case which will be described in detail later. Setting up these options are similar to setting up the “Program Definition” guidelines in that you can choose the guidelines, date range, and whether this guideline will be used for “Federal Percentages”, “Program Year Percentages” or “Both”.

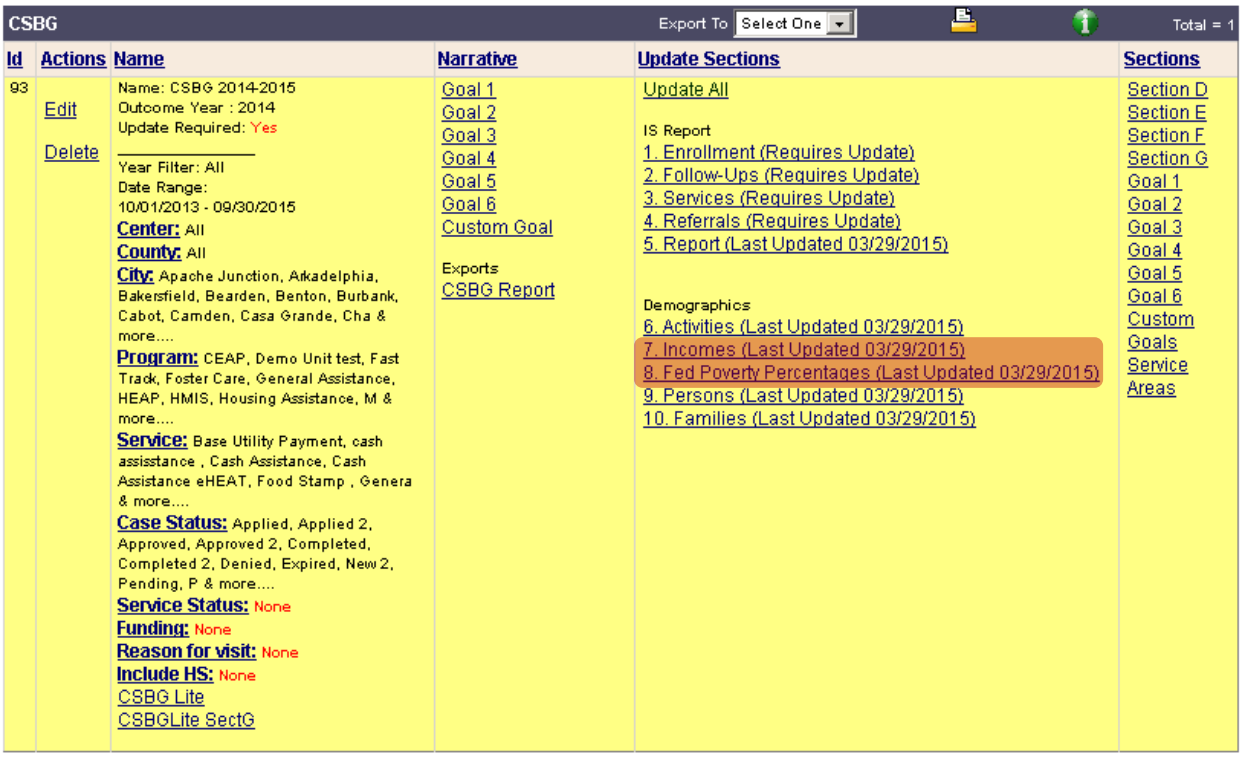


By default we have added rows for each type of “Non-Service Poverty Guideline” and tied it to the 2014 FPL because that was the last guideline we added for you automatically. If this guideline was removed from your system you will need to add the types yourself and tie it to the appropriate guideline. Additionally you may want different guidelines for Federal and Program Year amounts so feel free to change them.

Primarily these are used for demographic reporting. If a client has a case but no service, we can still generate a percentage for them where we previously had to rely on a saved value. The same can be said of a client that has only has a referral that achieved some goal but no other activities.

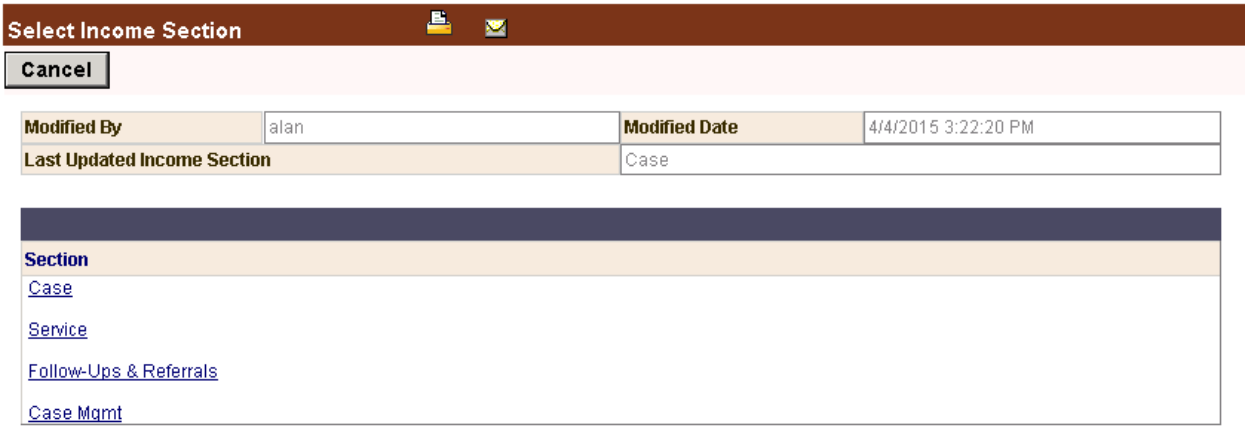
The “Generic” option is for items such as the “Dashboard” or “Client Listing Report” where we are using live “Family Eligibility Income” rather than case income. It may also be expanded to Case Forms and other purposes in the future.

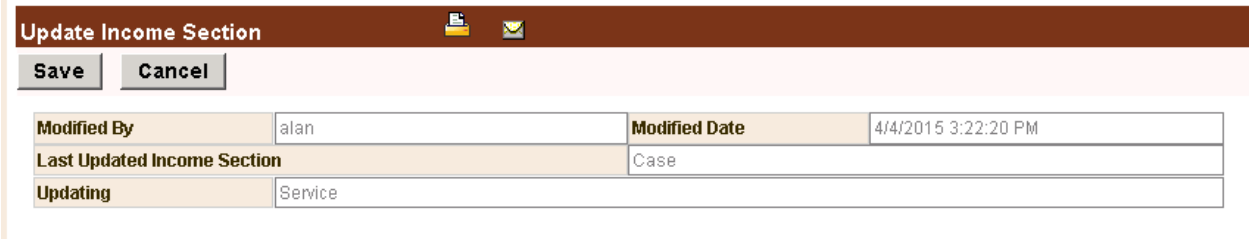
CSBG Changes > Update



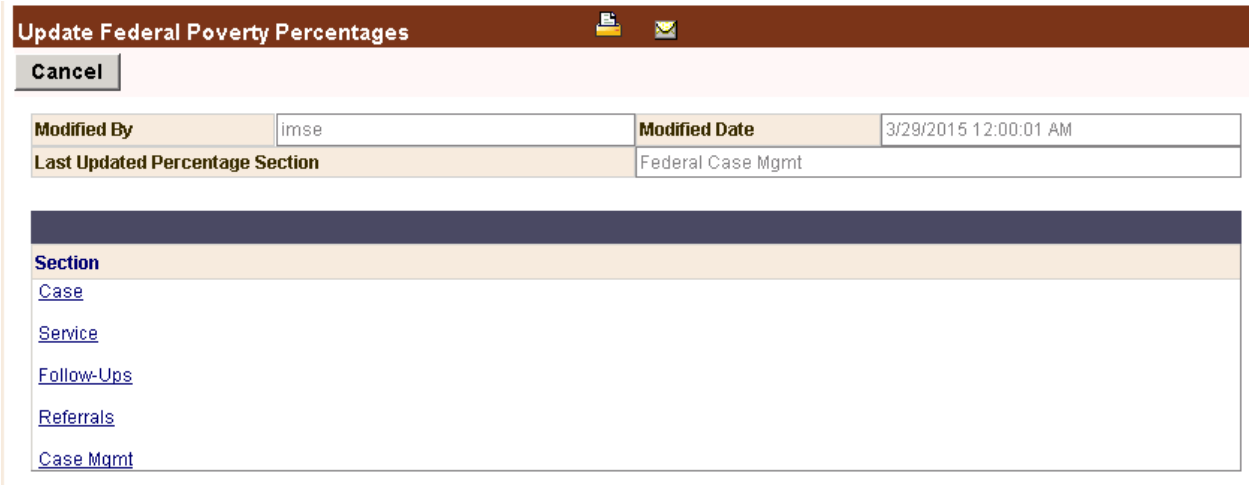
The CSBG update links have been updated due to the new percentages that are calculated in real time as well as trying to reduce the timeouts experienced by users. Generally timeouts are experienced when updating incomes or percentage levels.

For this reason we have broken up the sections into sub sections. Clicking the “Incomes” link will take you to a page that looks like the below.



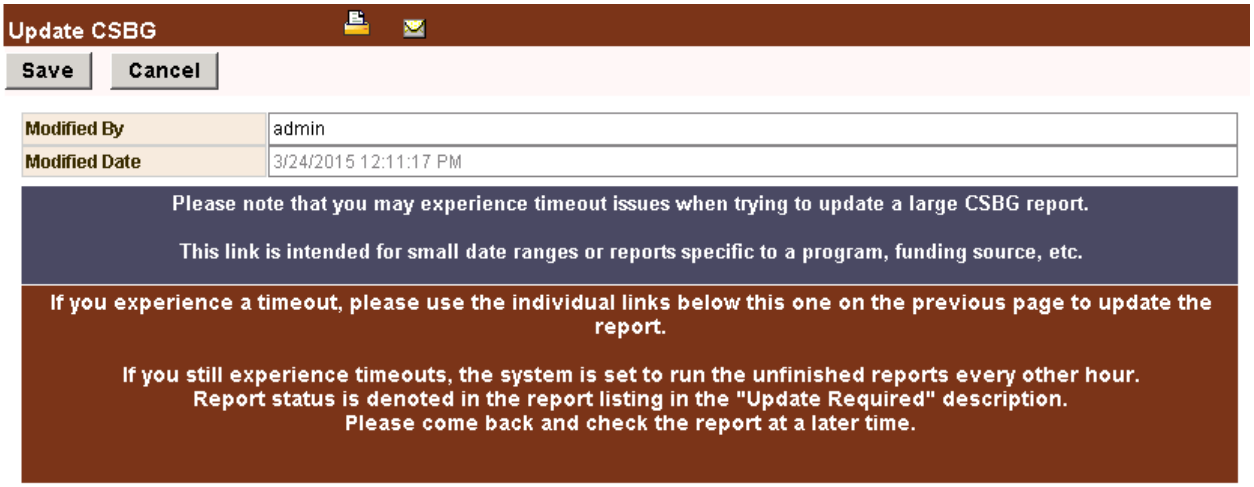


Clicking the sections will take you to a "Save" page where the report will be updated. This page tells you the last section updated and the section you are currently updating to help with navigation.

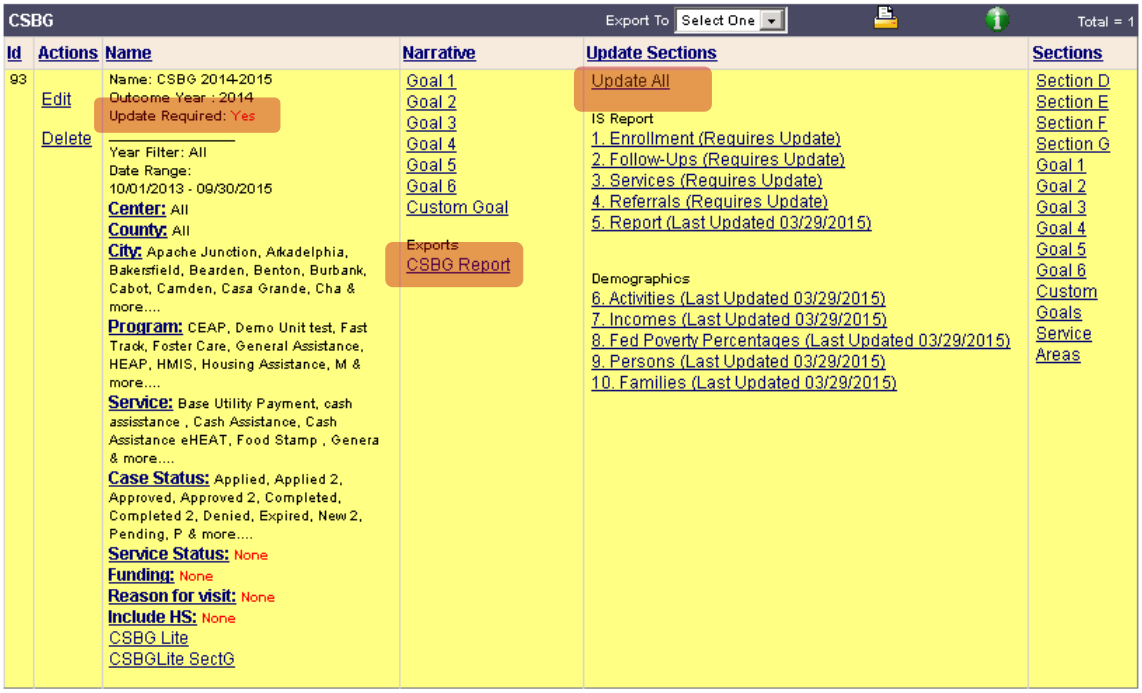


The percentage pages look very similar. You will notice we have the traditional service percentages plus the new Non-Service percentage levels. As before, the report will report a household in the bracket that their lowest income percentage resides in. Please ensure you update all report sections before viewing it.

CSBG Changes > Update > Auto Update



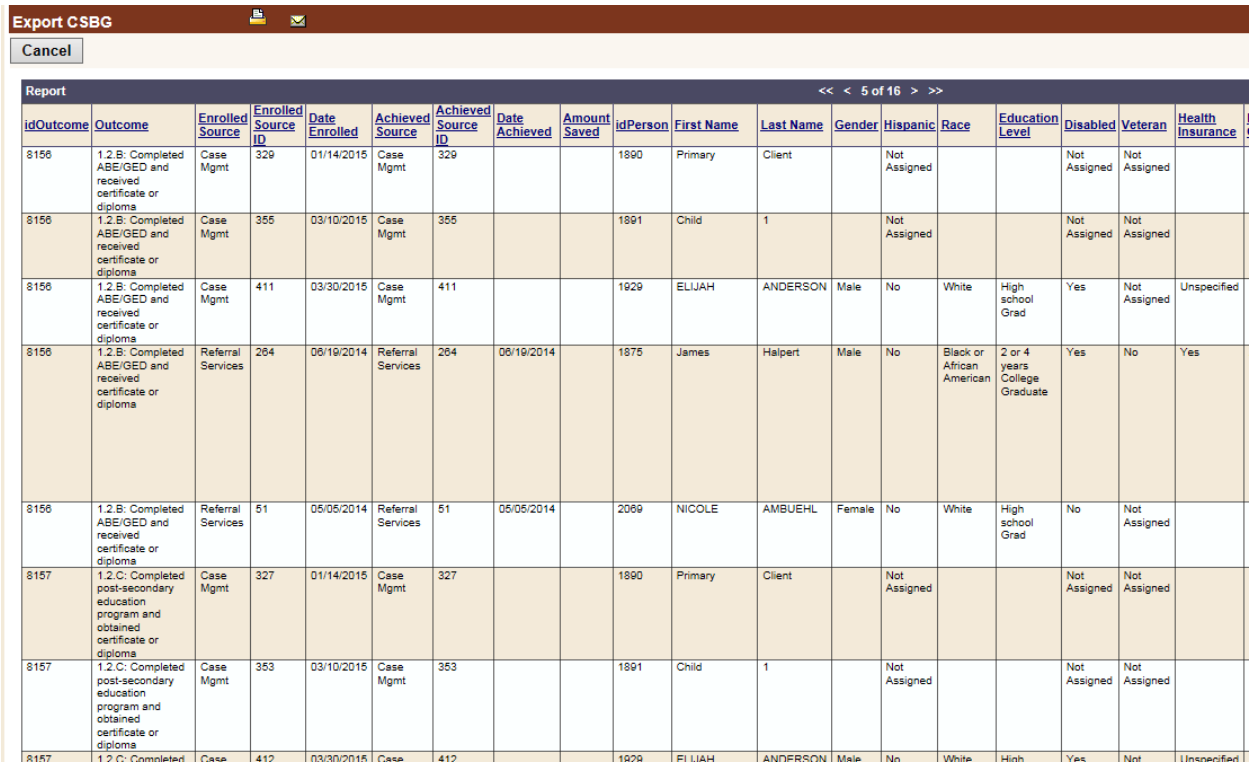
The “Update All” link still exists which will automatically run through all of the update sections for you. As before, it is likely we may experience timeouts when running reports with large numbers of clients. We had some clients that were experiencing timeouts even when updating the report by sections so we have added an auto-update feature to the system.



Whenever a CSBG is created or edited, the “Update Required” will be set to “Yes”. The system will automatically update those reports every other hour. When a report is updated either via the “Update All”, update links, or auto-update, “Update Required” will be changed to “No”.

CSBG Changes > Export

You may have noticed a new link under the “IS Report” update links, “5. Report”. This link serves several purposes including: making the report view run faster, enabling easier debugging of the report when tickets are sent in, but it primarily exists for the “CSBG Export” functionality which has been added.



Export CSBG

Cancel

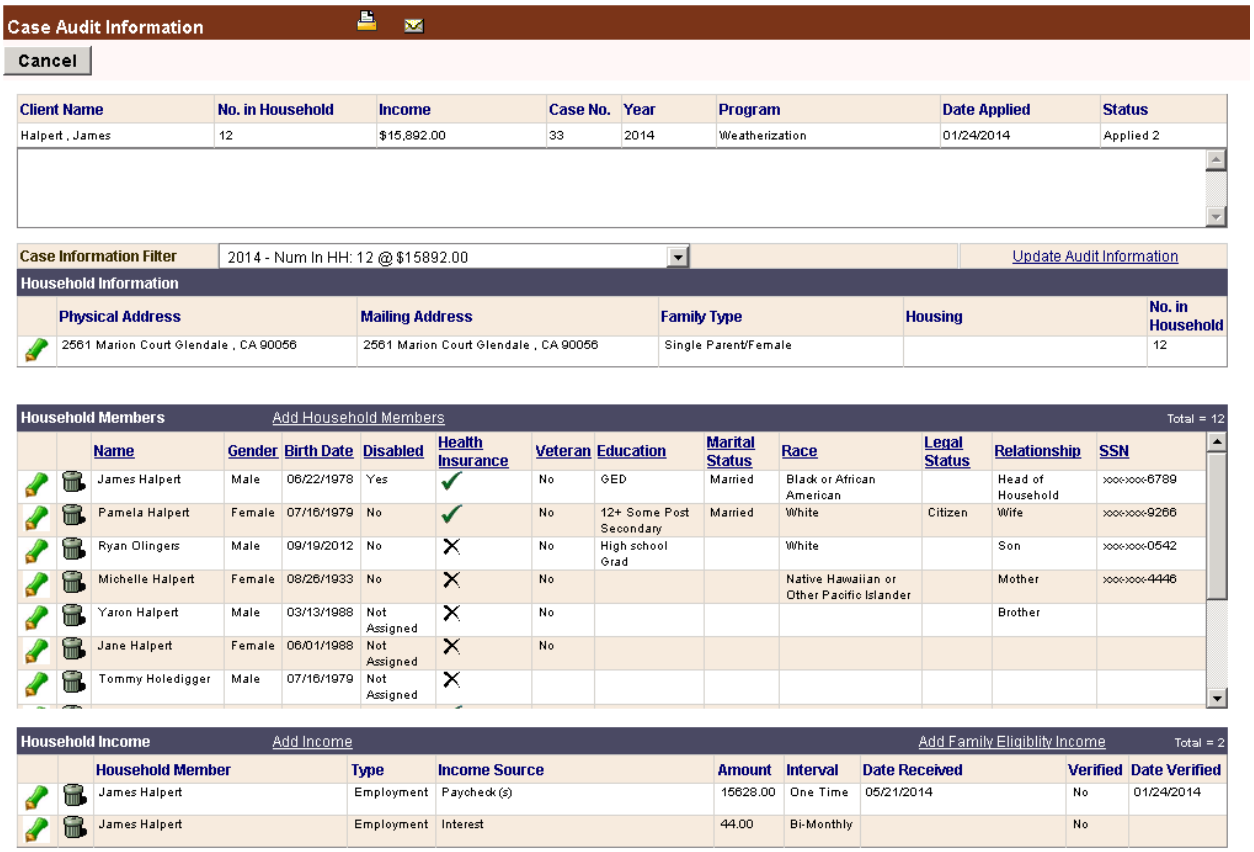
Report << < 5 of 16 > >>

idOutcome	Outcome	Enrolled Source	Enrolled Source ID	Date Enrolled	Achieved Source	Achieved Source ID	Date Achieved	Amount Saved	idPerson	First Name	Last Name	Gender	Hispanic	Race	Education Level	Disabled	Veteran	Health Insurance
8156	1.2.B: Completed ABE/GED and received certificate or diploma	Case Mgmt	329	01/14/2015	Case Mgmt	329			1890	Primary	Client		Not Assigned			Not Assigned	Not Assigned	
8156	1.2.B: Completed ABE/GED and received certificate or diploma	Case Mgmt	355	03/10/2015	Case Mgmt	355			1891	Child	1		Not Assigned			Not Assigned	Not Assigned	
8156	1.2.B: Completed ABE/GED and received certificate or diploma	Case Mgmt	411	03/30/2015	Case Mgmt	411			1929	ELIJAH	ANDERSON	Male	No	White	High school Grad	Yes	Not Assigned	Unspecified
8156	1.2.B: Completed ABE/GED and received certificate or diploma	Referral Services	264	06/19/2014	Referral Services	264	06/19/2014		1875	James	Halpert	Male	No	Black or African American	2 or 4 years College Graduate	Yes	No	Yes
8156	1.2.B: Completed ABE/GED and received certificate or diploma	Referral Services	51	05/05/2014	Referral Services	51	05/05/2014		2069	NICOLE	AMBUEHL	Female	No	White	High school Grad	No	Not Assigned	
8157	1.2.C: Completed post-secondary education program and obtained certificate or diploma	Case Mgmt	327	01/14/2015	Case Mgmt	327			1890	Primary	Client		Not Assigned			Not Assigned	Not Assigned	
8157	1.2.C: Completed post-secondary education program and obtained certificate or diploma	Case Mgmt	353	03/10/2015	Case Mgmt	353			1891	Child	1		Not Assigned			Not Assigned	Not Assigned	
8157	1.2.C: Completed	Case	412	03/30/2015	Case	412			1929	ELIJAH	ANDERSON	Male	No	White	High	Yes	Not	Unspecified

We had received several different requests that an agency be able to do some data mining on their activities in to be able to determine things such as, “How many Latina Females Age 24-34 achieved Goals 1.1.A and 6.2.B?” It would not make sense nor would it be possible for us to create filters for every type of filters imaginable, being able to export the report to excel will allow the agencies to data mine the report and answer questions like the above.

The export will show the goal the person was enrolled in, how they were enrolled, and how/if they achieved it. Also included are all of the person’s family and personal reportable characteristics. Due to the fact that a client can be enrolled in a goal multiple times and also achieve it in multiple ways multiple times, you will likely see duplicate family members in the listing. While we are working on adding ad-hoc reporting to the system in a future update, we hope this feature will assist agencies in answering some of those questions that assist with long term planning.

CSBG Changes > Audit Information



Case Audit Information

Cancel

Client Name	No. in Household	Income	Case No.	Year	Program	Date Applied	Status
Halpert , James	12	$15,892.00	33	2014	Weatherization	01/24/2014	Applied 2

Case Information Filter: 2014 - Num In HH: 12 @ $15892.00 — Update Audit Information

Household Information

	Physical Address	Mailing Address	Family Type	Housing	No. in Household
	2561 Marion Court Glendale , CA 90056	2561 Marion Court Glendale , CA 90056	Single Parent/Female		12

Household Members — Add Household Members — Total = 12

Name	Gender	Birth Date	Disabled	Health Insurance	Veteran	Education	Marital Status	Race	Legal Status	Relationship	SSN
James Halpert	Male	06/22/1978	Yes	✓	No	GED	Married	Black or African American		Head of Household	xxx-xx-6789
Pamela Halpert	Female	07/16/1979	No	✓	No	12+ Some Post Secondary	Married	White	Citizen	Wife	xxx-xx-9266
Ryan Olingers	Male	09/19/2012	No	✗	No	High school Grad		White		Son	xxx-xx-0542
Michelle Halpert	Female	08/26/1933	No	✗	No			Native Hawaiian or Other Pacific Islander		Mother	xxx-xx-4446
Yaron Halpert	Male	03/13/1988	Not Assigned	✗	No					Brother	
Jane Halpert	Female	06/01/1988	Not Assigned	✗	No						
Tommy Holedigger	Male	07/16/1979	Not Assigned	✗							

Household Income — Add Income — Add Family Eligiblity Income — Total = 2

Household Member	Type	Income Source	Amount	Interval	Date Received	Verified	Date Verified
James Halpert	Employment	Paycheck (s)	15628.00	One Time	05/21/2014	No	01/24/2014
James Halpert	Employment	Interest	44.00	Bi-Monthly		No	

One of the changes that has been slowly making its way into the system and is now fully implemented is Case Audit Information. While the details of how the audit works and its advantages will be further discussed directly below, it is worth mentioning here because of how it affects the CSBG.

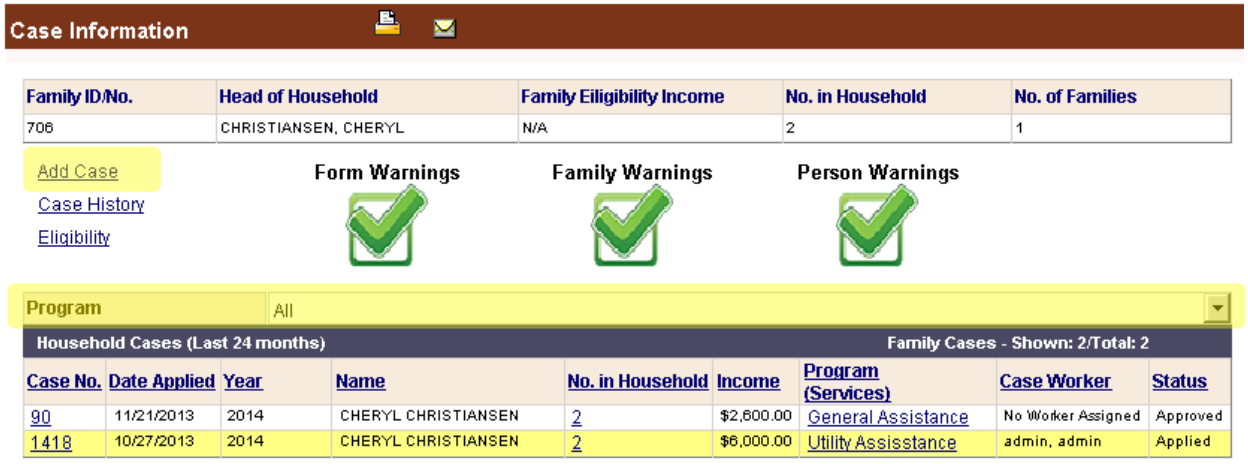
Mentioned earlier was that income has moved from the service to the Case as well as additional percentage calculations such as referrals or case management goals. Changing the location of the income records within a case now allows us to report the percentage of all the activities within a case because the income there relates to all activities within that case.

The audit for some time has been storing all of the data needed for the demographics reports but has now been enhanced with more fields and the ability to edit those fields directly. This allows us to report on the exact demographic data for a person/household at any point in time in history since the audits began (approximately 2 years ago). Previously the demographics were based on whatever was seen in the “Family Information” section, meaning we reported on whatever the current field values are. For obvious reasons, being able to accurately report on the demographics at the time of the activity is preferable to live data.

That being said, when viewing the demographics reports we must only show one value for a particular field per person/family. A person may not be disabled within their first case for a given time period but then disabled in their last case within a period. The report is set to use the data from the last

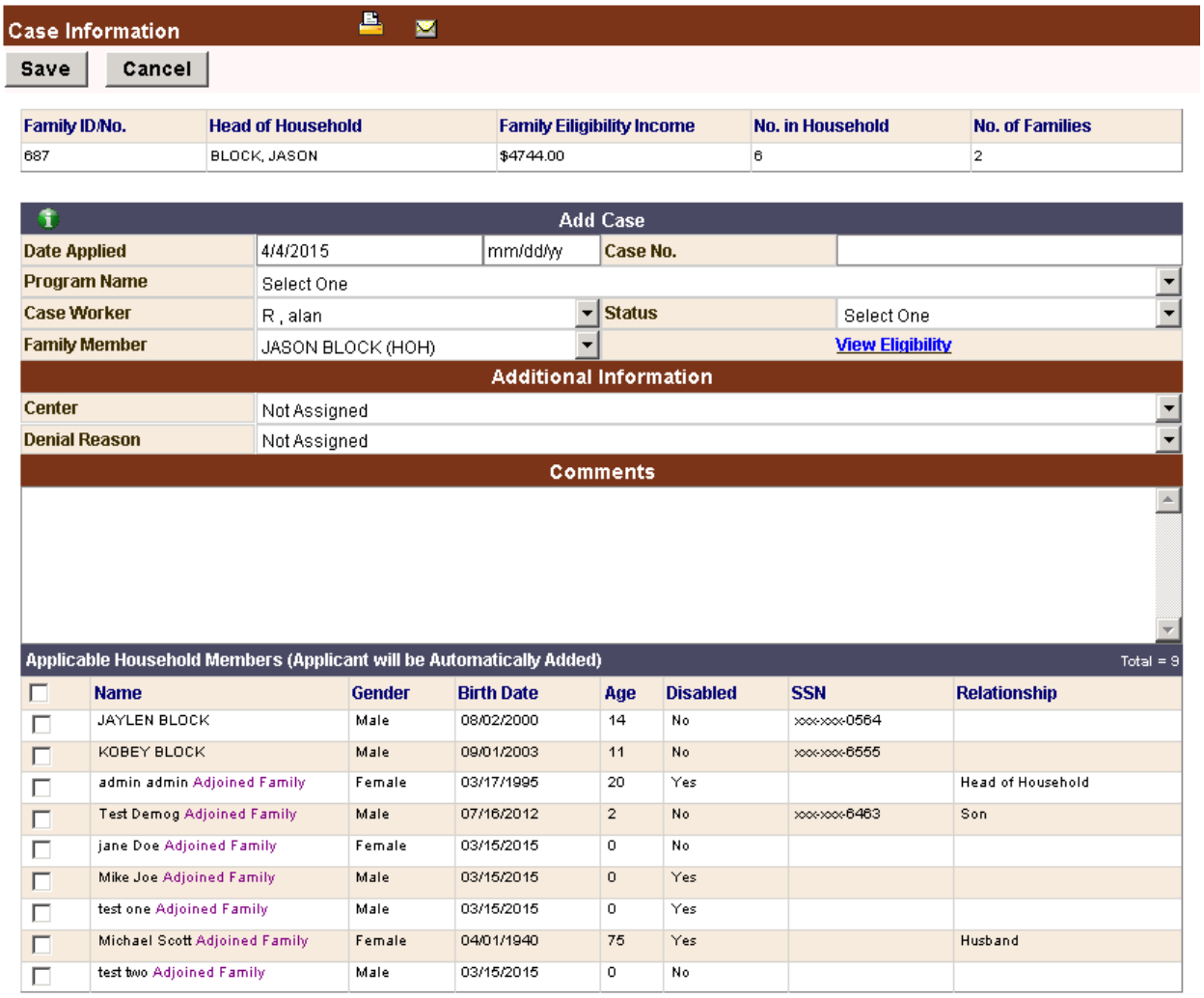
case added within the date range as we assume the last case added contains the most recent data. The advantage here is if you run a report for last year, you will see the most recent demographics of the person within that date range as opposed to what they currently have. It was already mentioned earlier that the Percentage a household is reported in is the lowest within a date range, not the most recent like the other demographics.

Audit Information

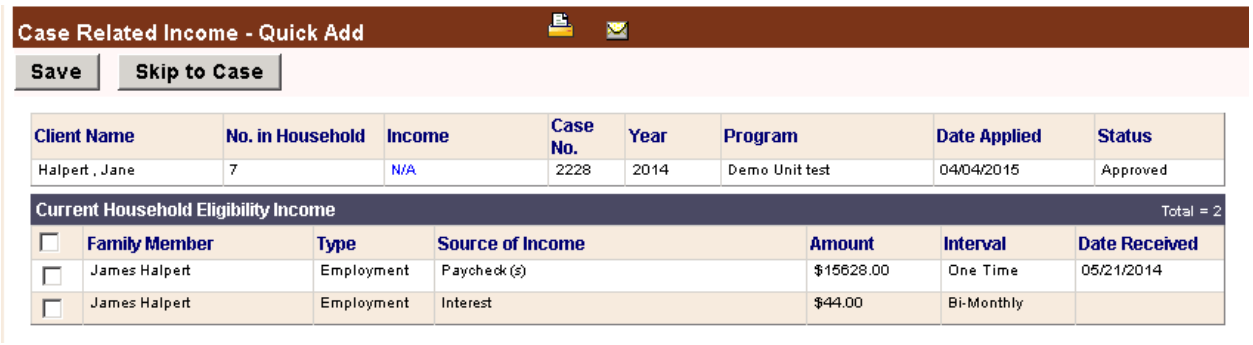


You will notice a few changes to the case listing page and the “Add Case” process. Firstly, the case listing now shows the “No. in Household” as well as the income attached to the case audit. This is to help caseworkers quickly find the case they would like to update with activities.

In all likelihood it will be the case at the top of the listing when filtered by program (a new filter) as the cases are ordered by “Date Applied” in descending order. Usually the most recent case will have the current household audit information. Clicking the “No. in Household” link will jump you immediately to the Case Audit page for further investigation.



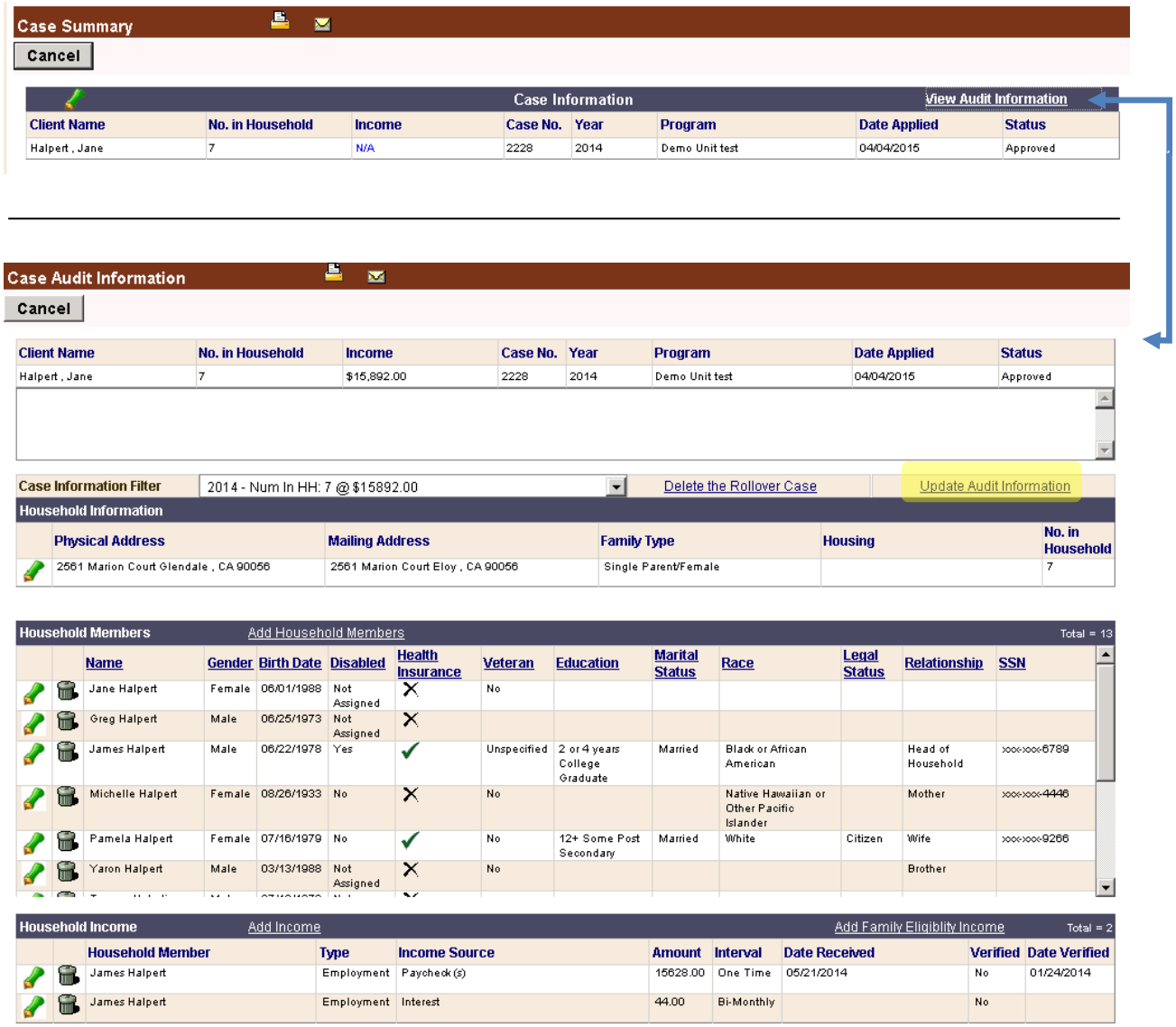
Clicking the “Add Case” link will take you to the same page in previous versions except the listing on the bottom has replaced NPIs with household members. Here the case worker should select all members that should be reported on when reporting activities within the case. Generally this will be all family members but there may be exceptions such as Domestic Violence where the abuser may live in the household but will not be served by the agency.



Clicking “Save” will take you to the “Case Related Income” page. This page looks and functions much like the older Service Income page by allowing you to quickly copy income from the “Family Eligibility Income” section to the case. If no income is applicable you may select “Skip to Case”, otherwise select the incomes the Household currently received and click “Save”.

The advantage of having the income on the case, other than reporting as mentioned above, is that this only needs to be done once. All activities, including services, will share this income and will not need to be added again. Just like service income in the previous version, only Program Definition > Countable Incomes will be counted towards service percentages and income amounts. Other activities such as follow-ups and case management are not connected to a funding source and therefore will not be filtered by Program Definition > Countable Incomes.

Audit Information > Editing and Updating



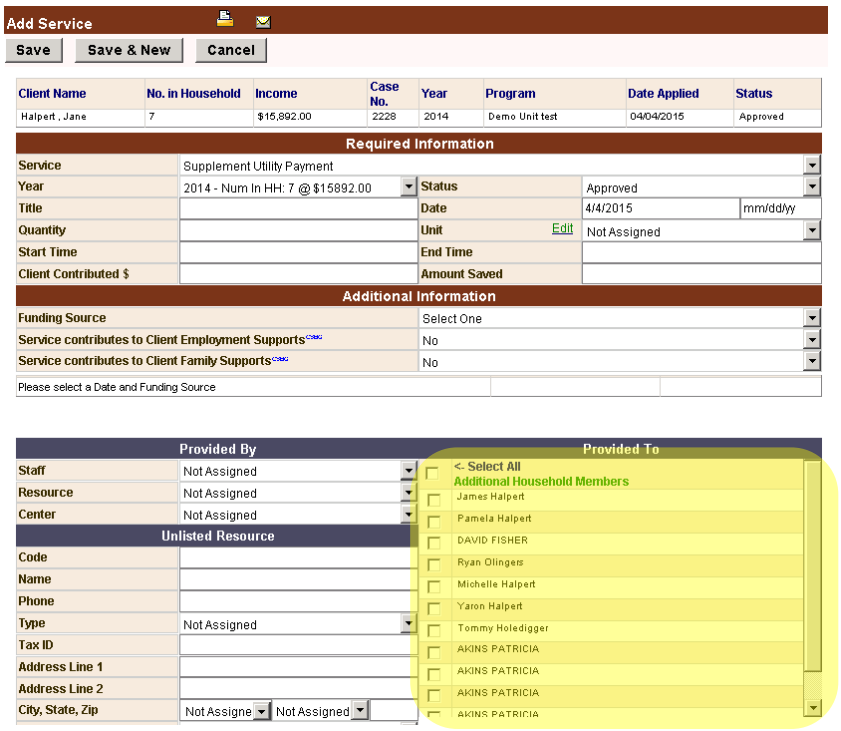
After the case is created you will land on the same case information page as before. The "View Audit Information" link is in the same place. Clicking it will take you to the Audit page pictured above. The main difference here between the previous versions is the amount of data now stored within the audit as well as the ability to edit the rows in case a mistake was made.

In regards to adding Household members, you will not be able to add duplicates in the audit nor will you be able to delete a Household member that received some activity within the case. There are no such restrictions on the income section and both options are provided here, adding a new income or copying from the "Family Eligibility Income."

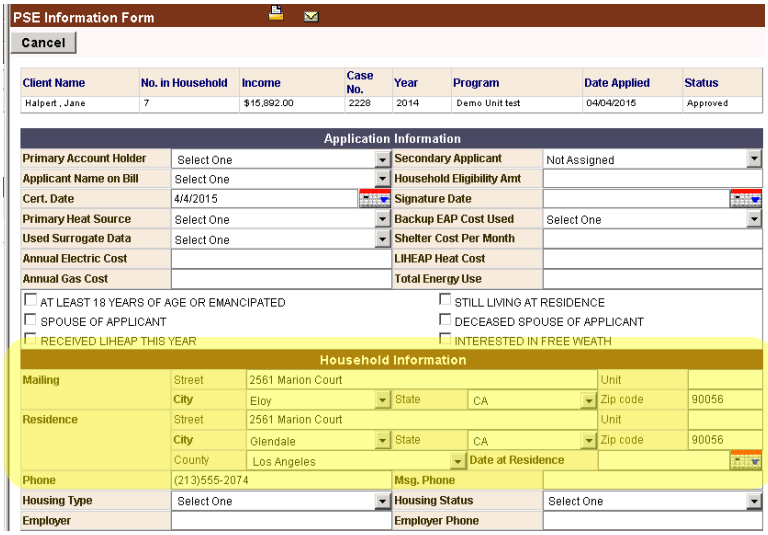
The “Update Audit Information” functions much like before in that it will copy all current Household Members, Income, demographic, and Address information from the live data to the Case Audit. This can be useful if a large amount of data is incorrect in the audit but editing the audit should be used whenever possible rather than a full update for cases more than a few days old as major household changes may have occurred.

Audit Information > Other Advantages

Besides improving reporting accuracy there are other advantages to having a complete and accurate snapshot of the household at the time of application.



The first one is accurately serving clients that were part of the application. Notice the “Provided To” list in the image above. Previously this was populated by the current household member where it is now populated by the audit data. This way, caseworkers will not accidentally serve someone new that has arrived in the household but has not yet been deemed eligible.



PSE Information Form

Cancel

Client Name	No. in Household	Income	Case No.	Year	Program	Date Applied	Status
Halpert , Jane	7	$15,892.00	2228	2014	Demo Unit test	04/04/2015	Approved

Application Information

Primary Account Holder	Select One	Secondary Applicant	Not Assigned
Applicant Name on Bill	Select One	Household Eligibility Amt	
Cert. Date	4/4/2015	Signature Date	
Primary Heat Source	Select One	Backup EAP Cost Used	Select One
Used Surrogate Data	Select One	Shelter Cost Per Month	
Annual Electric Cost		LIHEAP Heat Cost	
Annual Gas Cost		Total Energy Use	

- ☐ AT LEAST 18 YEARS OF AGE OR EMANCIPATED
- ☐ SPOUSE OF APPLICANT
- ☐ RECEIVED LIHEAP THIS YEAR
- ☐ STILL LIVING AT RESIDENCE
- ☐ DECEASED SPOUSE OF APPLICANT
- ☐ INTERESTED IN FREE WEATH

Household Information

Mailing	Street	2561 Marion Court			Unit	
	City	Eloy	State	CA	Zip code	90056
Residence	Street	2561 Marion Court			Unit	
	City	Glendale	State	CA	Zip code	90056
	County	Los Angeles	Date at Residence			
Phone	(213)555-2074		Msg. Phone			
Housing Type	Select One		Housing Status	Select One		
Employer			Employer Phone			

The major advantage will be the reduction of double data entry and improved custom case forms. Many agencies have case forms like the one pictured above that need to store the Address or other relevant data to their custom reports so they can report on the data at the time of application. In the v1.91 update this is no longer required as we can get this information from the audit.

There are numerous custom service vouchers, printables, and case worksheets that currently look at live client data. While this is fine in most cases as most activities happen on a single day, it makes going back and seeing what the data was at the time of application impossible. This means that a service voucher printed from a case a year ago and printed today may not match as live data has changed. We recommend all agencies that use such items to request their previous customizations take advantage of the new audit data where applicable.

Audit Information > Creating New Cases

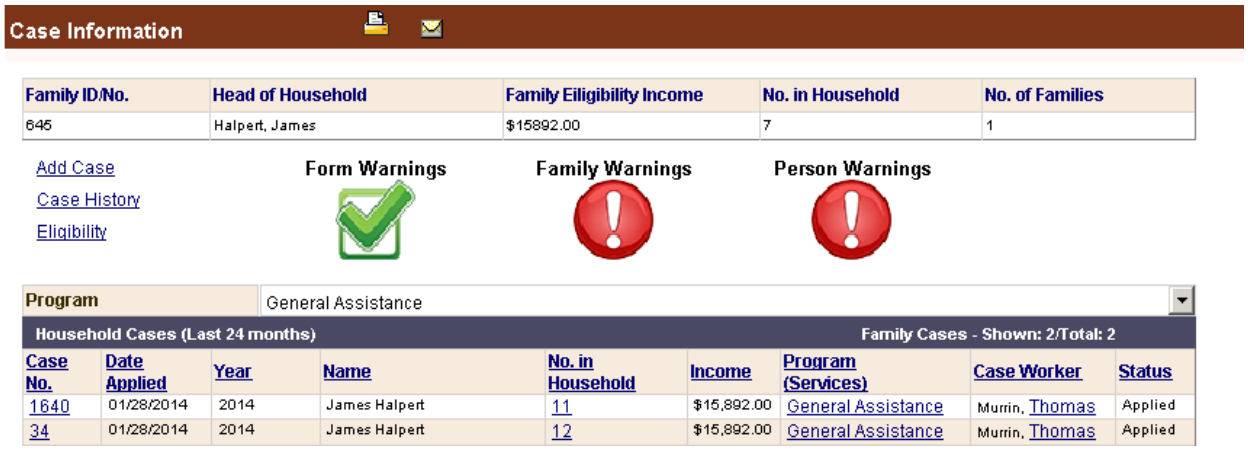
Having the snapshot of the household attached to the case has many advantages but will require caseworkers to manage how activities are attached to cases in more detail. For truly accurate reporting a new case should be created every time the household information changes before adding an activity to it. This was foreshadowed earlier when we mentioned that the Case Listing page now has the case income, number in household, and link to quickly check the case audit information. If this is done then a caseworker can likely assume the most recent case is the one to work with or create a new one if necessary. We feel that a new case with the current member and income data can be created almost as fast as adding a service with income data as the CAP60 1.90 version required. Many programs that serve a client only once a year will be unaffected. There is no negative affect to reporting by having a large number of cases for a person/household, the only negative affect would be viewing the case listing page.

The primary concerns with creating new cases would be num in household and income as that is how we calculate percentages. Something like an address change may or may not require a new case if your agency doesn't use any case forms, vouchers, worksheets, etc. that rely on that information. Additionally, instead of creating a new case, one could update an older case audit with current data without any negative affect other than losing the ability to accurately report on that time period. Therefore some programs may need to create new cases more often than others; we recommend your agency have internal discussions on when and why you may want to use an older but currently inaccurate audit data or update an older audit data as opposed to creating a new case.

In the last update letter we mentioned that this change like this would be coming. This change has many advantages but we do realize that the some agencies will not like or take advantage of them because they simply do not like the way the case listing page will look with many programs being listed several times in a year. That being said, we plan in the future to remove the connection between program and case, meaning that once a snapshot is created, all types of services can be added to the case without creating a new one. The only time a new case would need to be created is if the household information changes.

Audit Information > Migration

All of the above information regarding creating new cases means that old cases need to be updated to match the new structure. During the update we automatically broke up cases based on Number in Household and Income Amounts that were attached to services within the case because two different income snapshots can no longer exist within the same case.



In the picture above you can see a case that was split by the system after the update, the reason being that the number in household changed although the income amount was the same. The percentage would be different between the services within the original case so we maintained those percentages by splitting the case. If a case had 10 services with different income sets or number in household, it would be split into 10 cases. We tried to minimize the splitting as much as possible and again, the case listed on top would be the most recent one as it was generated by the last set of services attached within the original case.

Thank you for taking the time to read through our v.1.91 changes document. We feel these changes will prove extremely useful to users of the system and we hope you find this to be true as well. If you have any questions, comments, or concerns please contact yourCAP60 support account manager.

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Sincerely,

CAP60