

## Enhancement: Feature addition

**1. Visit > Situation 2/3**

- New Budget field added to Form
- An Income minus Expenses “budget” field is calculated and now included in the Situation 2/3 form.
- A [Calculate] button is included to refresh the budget field.
- The budget field presents only within an active Situation 2/3 form. It does not present for backwards tab hopping. A [Restart] action on the Situation flow will reactivate the budget field.

### SITUATION 2 | BUDGET BALANCE

VIEW PANE

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**Conference Visit**

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**Conference** 
**Case No.** 
**Client**

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**Case**

...

Please scroll down to enter employment, income, and expenses.

**Employment**

Please provide information about the client's employment situation.

Status	Full-time?	How long	Employer
Current	<input type="text" value="v"/>		
Previous	<input type="text" value="v"/>		

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**Budget**

**Balance** 
Income - Expenses

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**Income**

Below are the income sources recorded for the client. Please update this lists to reflect what the client reported.

Place a checkmark in the first column to delete an item.

**2. Visit > Check Request**

- “Check Paid Date” field added to this Form

## Enhancement: Feature addition

### **3. *Visit > Assistance > Grid***

- “Check Number”, “Other” and “Comments” columns added

### **4. *Conference Reports > Assistance by Case***

- “Number of children in household” and “Resource” columns added

### **5. *Conference Reports > Check Request Transactions***

- This is a New Report
- Includes columns for: “Conference”, “Notes” and “Payee Address”

### **6. *Diocesan Reports > Underlying Causes YTD***

- Includes columns: “Category”, “Other” and “Number of children in household”

## Enhancement: Feature change

**7. Visit > [Reassign]**

- New case information within the task label: “Case #”, “Workflow”, “Conference”, “Visit Type” and “Intake Date”)
- [Reassign] button presents options for Message to existing Case Worker and/or Case Manager control.

### [REASSIGN]

VIEW PANE

Case 2023-00148: Conference Visit | St. Bernard/Spring Grove Village | Home on 04/13/2023

Case Manager 
Case Worker \* 
Secondary

Client Profile
Household
Situation
Requests
Assistance
Follow-Up

First Name 
MI 
Last Name 
Maiden Name

Gender 
Marital Status 
DOB 
SSN

Ethnicity 
Church

Spanish Only 
Homeless 
Veteran 
Grade

Other Aid
 Child Support
  Food Stamps / SNAP
  Medicaid
  Medicare
  Section 8

### OVERVIEW: ROLES ASSIGNED

VIEW PANE

Case 2023-00148: Conference Visit | St. Bernard/Spring Grove Village | Home on 4/13/2023

Case Manager 
Caseworker 
Secondary

Provide an update or message to the volunteers assigned to this case:\*

Client Profile
Household
Situation
Requests
Assistance
Follow-Up

First Name 
MI 
Last Name 
Maiden Name

## Enhancement: Feature change

### 8. Intake, Visit > [Exit]

- The [Exit] button references have been removed (deprecated due to Browser technology)
- The Browser top line [ < ] back button is exclusively used for backward navigation in CMS.

### 9. *Monthly Financial Report (MFR)*

- Visits and Services to People > In Kind Goods & Services (MFR page 2.)
- Additional data is now present within the table.
- J. Food includes data from Express Assistance
- O. Other includes data from Food Bank Pantry

### 10. *Monthly Financial Report (MFR)*

- Hours and Miles > Total Hours of Service: Non-Members (MFR page 5.)
- Actual data is now presented in the table.
- Total Hours of Service: Non-Members

## Bug Fixes

### 1. *Visit > Pre Visit*

- On occasion the Miles and Visit Type fields were uneditable upon tab hopping. This is fixed.

### 2. *Conference Reports > Assistance Reports*

- Occasionally, some records listed within the report were presented as duplicates. This is fixed.

## Bug Fixes

### **3. *Visit > [Options] > [Red-Flag] > [Close without Assistance]***

- The Case is no longer deleted by this action. Fixed.

### **4. *Email Notifications***

- Email notifications are no longer sent to Members whose role assignments have been removed.