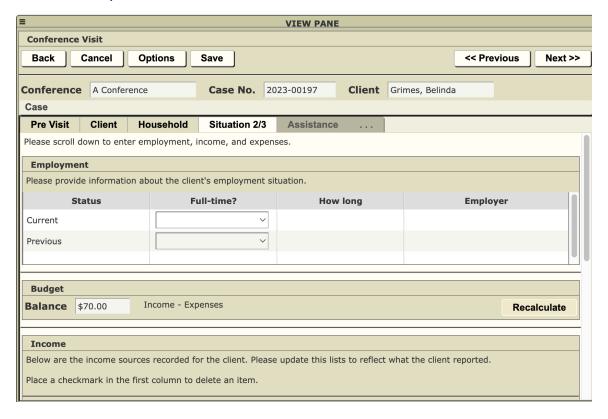


Enhancement: Feature addition

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



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"

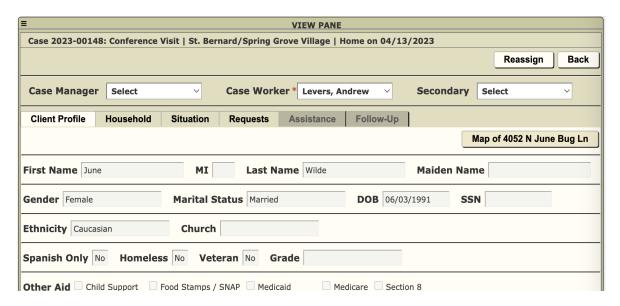


Enhancement: Feature change

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]



OVERVIEW: ROLES ASSIGNED





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.