Caseworker Training

Archdiocese of Houston – Galveston

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.

Home	My Profile	Search	Documents	User Guide	Support	Logout

×	VIEW PANE

Messages

Please click on a message to see details.

ID	End Date	Message
386089	03/08/2023	You have been assigned as Case Manager to 2023-09362

Main Menu

Options
My Assigned Cases
Case Intake
Pantry Fulfillment
Pantry Closeout
Unassigned Cases for Case Worker
Check Requests

Logged in: Prime1 Training

VIEW PANE

My Assigned Cases

Case	Case Worker	Client	Zip	Conference
2023-03068	Training, Prime1	test2, test1	77456	Training Conference
2023-03371	Training, Prime1	Test, James	77041	Training Conference
2023-04302	Training, Prime1	Test, Client2	77001	Training Conference
2023-04404	Training, Prime1	Compassion, Julie	77008	Training Conference
2023-04772	Training, Prime1	test, tom	77009	Training Conference
2023-04773	Training, Prime1	Test, Tom	77009	Training Conference
2023-04782	Training, Prime1	Test, James	77041	Training Conference
2023-05204	Training, Prime1	Apartments, Imperial	7386	Training Conference
2023-06167	Member, New	Test, Joe	77461	Training Conference
2023-06207	Training, Prime1	Test, JoAnn	77461	Training Conference
2023-06250	Training, Prime1	test, fames		Training Conference
2023-06252	Training, Prime1	Test, John	77056	Training Conference
2023-09006	Training, Prime1	Test, James		Training Conference
2023-09301	(Unassigned)	test, Client		Training Conference
2023-09362	Training, Prime1	Test, Client		Training Conference
FBP-22-26381	Training, Prime1	test, Client	77001	Training Conference
INQ-23-09094	(Unassigned)	Smith,		

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).

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.

VIEW PANE *

Conference Visit

| Back | Cancel | Options | Save | | Next >> |

Conference Training Conference   Case No. 2023-09362   Client Test, Client

Case

| Pre Visit | Client | Household | Situation | Assistance | ... |

Get Case Record Form | Show Client's Intake Address in Google Maps

Click to generate prepopulated Case Record Form.

This address is what was provided during intake.
If it has been changed, you may review the prevous address
By clicking on "Client" below and seeing the client record..

Visit Type * Home   Date * 02/28/2023

The following notes detail any scheduling arrangements and efforts that may have been made for this visit, as well as related information:

Beware of an aggressive dog next door   Check the note section for any details related to the visit. Add new information if needed.

| | 12 | **B** *I* U | | • Bullet List | |

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).

New client – Need to input missing client information

Existing client – Click on Import Blanks button to import existing client information.

| Home | My Profile | Search | Documents | User Guide | Support | Logout |

Logged in: Huy Nguyen

Vincentian Case Management System

VIEW PANE

Conference Visit

| Back | Cancel | Options | Save | | << Previous | Change Client | Next >> |

| **Conference** Training Conference | **Case No.** 2023-12141 | **Client** Test, James |

Case

| Pre Visit | **Client - Existing Client** | Household | Situation | Assistance | ... |

Please make corrections and additions to the client's intake profile below.

The client's record on file will be updated from these edits when you click Next. The client record's current profile can be reviewed in the Client Record accordion section below. Use the Import button below to automatically fill in the blanks below with the current values from the client's record. NOTE: Checkboxes will be left alone, and need to be manually merged.

Import Blanks from Current Client Record

Map of 123 Test Drive

| **First Name*** James | **MI** | **Last Name*** Test | **Maiden Name** |

Gender* Male   **Marital Status*** Married   **DOB*** 09/01/1983   **SSN** [   ] Up to last five digits

Ethnicity* Caucasian   **Church** Select

Spanish Only ☐ **Homeless** ☐ **Veteran** ☐ **Grade** Select

Other Aid ☐ Child Support ☐ Food Stamps / SNAP ☐ Medicaid ☐ Medicare ☐ Section 8
☐ Social Security ☐ SSI Disability ☐ Unemployment ☐ Veteran ☐ WIC

Phone 832-832-2324   **Alternate Phone** [   ]   **Work Phone** [   ]   **Email** JT12@gmail.com

Address* 123 Test Drive
Apt. #1
City* Houston   **State*** Texas   **Zip*** 77041   **County** Select   **How long here?** [   ]

Request Details | Case Worker: Training, Prime1

Past Assistance

Client Record Notes

Client Identification – Will cycle through four separate searches to find a match in the existing database. If you do not see a match in the current search, click on Next to go to the next page and/or search.

Client Identification – On the last search screen (Client Identification 4/4), if no match is found in the existing database, Click on Create Client to create a new client for the case.

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.**

Vincentian Case Management System

| Home | My Profile | Search | Documents | User Guide | Support | Logout |

Logged in: Prime1 Training

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Conference Visit

| Back | Cancel | Options | | << Previous | Change Client | Create Client |

Conference Training Conference **Case No.** 2023-09362 **Client** Test, Client

Case

| Pre Visit | Client - New Client | Household | Situation | Assistance | . . . |

You did not find a matching client among the existing client records. You can use the Previous button to try again. If you provide a more complete client profile, the client identification accuracy will improve.

If you are sure this client is not in the database already, then please complete the profile below and click Create Client to proceed with a new client record.

First Name* Client   **MI**   **Last Name*** Test   **Maiden Name**

Gender* Male   **Marital Status*** Married   **DOB*** 01/01/1970   **SSN**   Up to last five digits

Ethnicity* Undisclosed   **Church** Select

Spanish Only ☐ **Homeless** ☐ **Veteran** ☐ **Grade** Select

Other Aid ☐ Child Support ☐ Food Stamps / SNAP ☐ Medicaid ☐ Medicare ☐ Section 8
☐ Social Security ☐ SSI Disability ☐ Unemployment ☐ Veteran ☐ WIC

Phone 832-456-7890   **Alternate Phone**   **Work Phone**   **Email**

Address* 123 anyway

City* Houston   **State*** Texas   **Zip*** 77001   **County** Select   **How long here?**

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>>

Vincentian Case Management System

| Home | My Profile | Search | Documents | User Guide | Support | Logout |

VIEW PANE

Conference Visit

| Back | Cancel | Options | Save | | << Previous | Next >> |

Conference Training Conference   **Case No.** 2023-09362   **Client** Test, Client

Case

| Pre Visit | Client | Household | Situation | Assistance | ... |

A yellow row indicates the person was added during intake.
DOB: If you know the persons DOB, enter it as MM/DD/YYYY. Otherwise, you may enter an estimated birth year, such as 1976, or age in years, such as 32.

Del	First Name *	Last Name *	DOB *	Gender *	Relationship	Ethnicity *	SSN (Up to last 5)	Veteran?	Grade
☐	Client1	Test	12/29/1980	Female	Spouse or Partner	Undisclosed		☐	
								☐	

To add new household member, start typing in the empty line below the last household member.

To delete an existing household member, click on the Del box.

8. **Situation 1/3** - Enter information about the Friend's current situation (including the reason for the requested assistance) and future plans 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.

Vincentian Case Management System

| Home | My Profile | Search | Documents | User Guide | Support | Logout |

Logged in: Prime1 Training

VIEW PANE *

Conference Visit

| Back | Cancel | Options | Save | | << Previous | Next >> |

| Conference | Training Conference | Case No. | 2023-09362 | Client | Test, Client |

Case

| Pre Visit | Client | Household | **Situation 1/3** | Assistance | ... |

Current Plan and Future Plan are required. Please scroll down to enter information.

Please provide brief summary information, extenuating circumstances or supporting comments on why assistance is needed*

The neighbor lost his job and need help with the rent.

The Caseworker should provide sufficient information to explain why the Friend needs the assistance so that others in the future unfamiliar with the case can better understand the circumstances leading up to the request for assistance. This will be particularly helpful if the Friend returns for additional assistance in the future.

| | 12 v | B | I | U | ■ | • Bullet List | 📎 |

Client's plan for the future:*

He will apply for unemployment benefits and will look for another job.

| | 12 v | B | I | U | ■ | • Bullet List | 📎 |

Event Code

Major relief efforts, e.g. major disaster recovery efforts like after a hurricane, often get assigned event codes, e.g. from FEMA. If applicable, please provide the designated event code here.

| Event Code | ARPA |

Enter Event Code if instructed by the Council for special programs.

Case Instructions

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

Income and Expense information are useful in determining the amount of financial help to provide.

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

NEXT>>

Vincentian Case
Management System

| Home | My Profile | Search | Documents | User Guide | Support | Logout |

Logged in: Prime1 Training

VIEW PANE *

Conference Visit

| Back | Cancel | Options | Save | | << Previous | Next >> |

Conference Training Conference   **Case No.** 2023-09362   **Client** Test, Client

Case

| Pre Visit | Client | Household | Situation 3/3 | Assistance | ... |

Underlying Causes is required. Please scroll down to enter information.

Underlying Causes: *

☐ COVID-19   ☐ Addiction   ☐ Child Abandonment
☐ Domestic Violence   ☐ Fixed Income   ☐ Immigration Status
☐ Lack of Affordable Housing ☐ Lack of Budgeting Knowledge ☐ Lack of Education
☐ Lack of Family Support ☐ Lack of Knowledge of Resources ☐ Lack of post-prison support
☐ Lack of Public Transportation ☐ Limited Job Opportunities ☐ Low Federal Benefits
☐ Low Wages   ☐ Poor Health/Medical Needs   ☐ Single Parent Family
☐ Slow SSI Approval   ☑ Unemployment   ☐ Unfair lending practices
☐ Other

Other [   ]

How was this need taken care of in the past? (Mark all that apply)

Past ☐ Alimony   ☐ Child Support   ☐ Disability   ☑ Employment (resident)
     ☐ Food Stamps / SNAP ☐ HUD/Assisted Living ☐ Medicaid   ☐ Retirement
     ☐ Section 8   ☐ Social Security   ☐ SSD/SSI   ☐ State Welfare
     ☐ TANF (AFDC)   ☐ Unemployment   ☐ Veterans' Benefits ☐ Worker's Compensation
     ☐ Other

Other [   ]

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

- 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 In-Kind/Voucher is used to enter any food or other gift cards given to the Friend, any referrals (i.e. gave the Friend the Community Resource Referral Guide sheet), Furniture Vouchers sent to the SVdP Warehouse, Clothing or Household items given to the Friend.

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).

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**

	VIEW PANE *
Add Check Request to 2023-09362	
	Cancel Submit

Assistance Details

Category *	Housing/Rent ▾	Resource *	Rent ▾

*☑ The payment information below matches the information on the client bill in question.

Account Holder Name	Test Client	Account No	Apt #3
Amount *	$400.00	Rekey Account No	Apt# 3
		Other	

Assistance Details

*☑ The vendor information below including name and address, match the client bill in question.

Vendor Category *	Housing ▾
Other Vendor	☐ If the vendor is not listed below, place a checkmark here to enter the vendor information directly.
Vendor *	Briarstone Apartments ▾

19. Repeat the same process as 11 - 18 above to add other assistance (i.e. Add In-Kind/Voucher for gift cards or a referral sheet).

- For Gift Cards, select Assistance/Aid for the Category, Gift Card for the Resource, include in Amount the value of the card, enter what type of card was provided in Comments, **NEXT>>** and skip entering any vendor information on the next page by again clicking **NEXT>>** .

If you need to add more assistance, attachment or follow up, click on the appropriate tab. When you are done, click on the Close Case tab. An example of how to attach a document is on the next slide
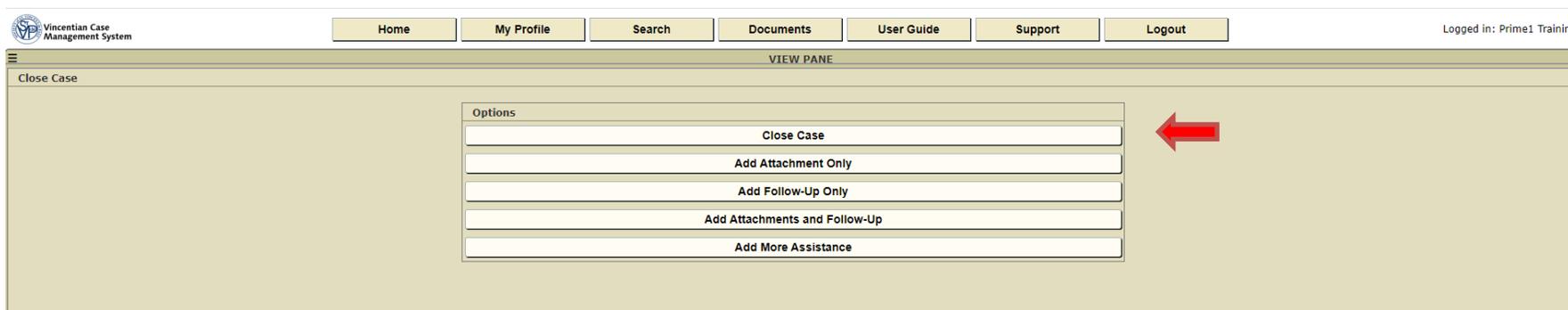
The user should not select the "Close Case" option if there is an outstanding Pledge in the Assistance tab, since closing the case will cause the pledge to be withdrawn.

See the last two slides when a case needs to be closed "without assistance".

20. **Attachments** - copies of receipts, pledges, lease agreements, etc. can be attached using this function. If there are no attachments, then select **NEXT>>** Otherwise, to attach a document, photo, etc., select **Upload**.

- Select **Browse** and navigate on your computer to the location of the document, photo, etc. to be attached.
- Provide a brief **Name** for the document and include any **Comments** you find helpful.
- Select **Upload**

Uploaded documents will be accessible for up to one year after the case is closed. Conference officers will have access to the attachments for up to seven years. By uploading documents to CMS, you can store your documents electronically in CMS and meet Council's record keeping requirement.

In the Close Case tab, be sure to enter the time and mileage spent on the case before closing it.

If the pledge or check request has been denied, the case might have to be closed without any assistance. Click on the Cancel button.

Provide the reason why the case needed to be closed without assistance. Enter the minutes and mileage information. Click on Submit to close the case.