2011 -2012

FAMCare Connect Admin Guide

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The FAMCare Connect Administrator Guide will help a FAMCare administrator setup and configure the system.

Contents

How to Define Security Needs

Security Hierarchy

To include relation between provider, group and user for security permissions

Predefined Security Groups

Your FAMCare Connect system comes equipped with eleven fully functional security groups that have been predefined based on job descriptions that are common to the industry. The **Security Grid** gives an overview of the access levels granted to each group on a form-by-form basis.

To view the security grid – refer to the security groups' process map.

	Accounting	ADMIN	Case Worker or Social Worker Supervisor	Case Worker	Intake	Program Director	Program Manager	Residential Direct Care Supervisor	Residential Direct Care Staff	System Administrator	Therapists or Clinicians
Intake/Demographics											
Demographics	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓
Referral	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓
Face Sheet	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓
Enroll/Disenroll Client	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓
Personal Inventory	✓	✓	✓	✓	✓	✓	✓	✓		✓	
Clothing Inventory		✓	✓	✓	✓	✓	✓	✓		✓	✓
Funding Source Detail	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓
Upload Picture	✓	✓	✓	✓	✓	✓	✓	✓		✓	
School Information	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓
Medical											
Medical Screening	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓
Nursing Assessment	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓
Client Medication	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓
Assessments	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓
Axis Diagnosis	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓
Drug Screening / Testing	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓
Psych Progress Report	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓
Strengths and Needs Assessment	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓
CANS SD	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓
CANS DD	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓
CANS MH	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓
MAYSI 2	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓
Case Management											
Case Notes Billable	✓	✓	✓	✓		✓	✓	✓		✓	✓
Collateral Contacts		✓	✓	✓		✓	✓	✓	✓	✓	✓
Daily Shift Notes		✓	✓	✓		✓	✓	✓	✓	✓	✓
Contacts / Relationships		✓	✓	✓	✓	✓	✓	✓		✓	✓
Treatment Plan		✓	✓	✓		✓	✓	✓		✓	✓
Discharge Summary	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓
Insurance Policies	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓
Scanned documents/External Files	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓
Generic Incident Report		✓	✓	✓		✓	✓	✓	●	✓	✓
CW Incident Report		✓	✓	✓		✓	✓	✓	●	✓	✓
Residential Incident Report		✓	✓	✓		✓	✓	✓	●	✓	✓
Legal											
Court Information	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓
Restitution Information	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓
Offense / Criminal History	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓
Scanned Court Orders	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓

Security for Your Agency

Whenever possible it is considered Best Practice to configure the existing security groups to match the roles within your organization instead of creating new groups.

As updates are released to your system you will occasionally receive entirely new forms that will have security already configured based on the Predefined Security Groups, and using these groups as a starting point will also dramatically reduce your initial time investment in preparing your organization to begin using FAMCare Connect.

Configuring Security Groups

> ***Best Practice Alert*** *– prior to configuring security groups take time to define roles within your agency if you have not already. FAMCare Connect is designed to work within your agency's business rules and standards. Establishing these practices prior to configuration of your system will aid in system implementation.*

Security Groups Setup

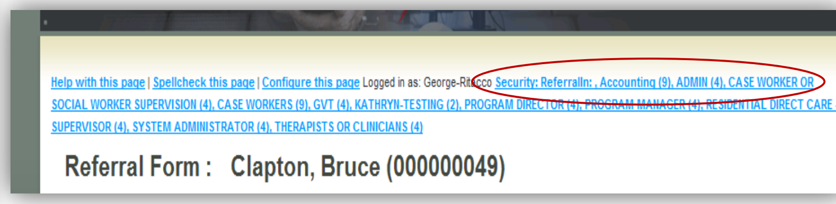
Refresh Add

Records found: **16**. Displaying records **1-16.**

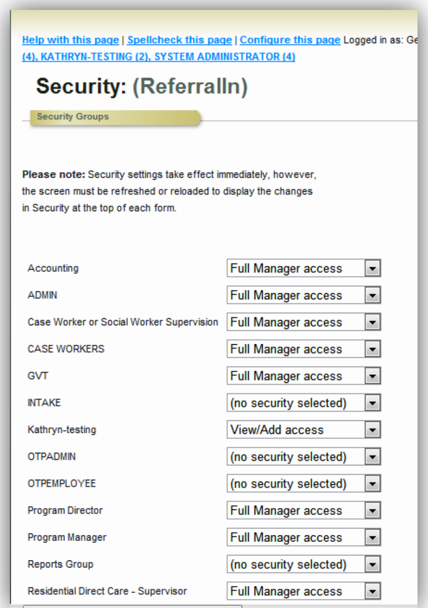
Action	Group Name	GroupMembers
Edit	Accounting	bill-lowther (GVT-Base) danielle-ritacco (GVT-Base) kathryn-slattery (GVT-Base)
Edit	ADMIN	bill-lowther (GVT-Base) bill-otp (GVT-Base) chris-freund (GVT-Base) danielle-ritacco (GVT-Base) emily-foust (GVT-Base) George-Ritacco (GVT-Base) kathryn-slattery (GVT-Base) kelley-foust (GVT-Base) kevin-morin (GVT-Base) merry-perkins (GVT-Base) ray-scott (GVT-Base) Roe-Grover (GVT-Base) Simon-Wang (GVT-Base) slattery-kathryn (GVT-Base) steve-grover (GVT-Base)
Edit	Case Worker or Social Worker Supervision	bill-lowther (GVT-Base) danielle-ritacco (GVT-Base) kathryn-slattery (GVT-Base)
Edit	CASE WORKERS	bill-lowther (GVT-Base) danielle-ritacco (GVT-Base) George-Ritacco (GVT-Base) kathryn-slattery1 (GVT-Base) kelley-test (GVT-Base)
Edit	GVT	bill-lowther (GVT-Base)
Edit	INTAKE	danielle-ritacco (GVT-Base)

With [Forms Configuration Mode] enabled navigate to the form for which you wish to adjust access levels.

Once the form has loaded you will notice a link for **Security** at the top of the form – once clicked on it will load a screen that shows you the current access granted per security group.

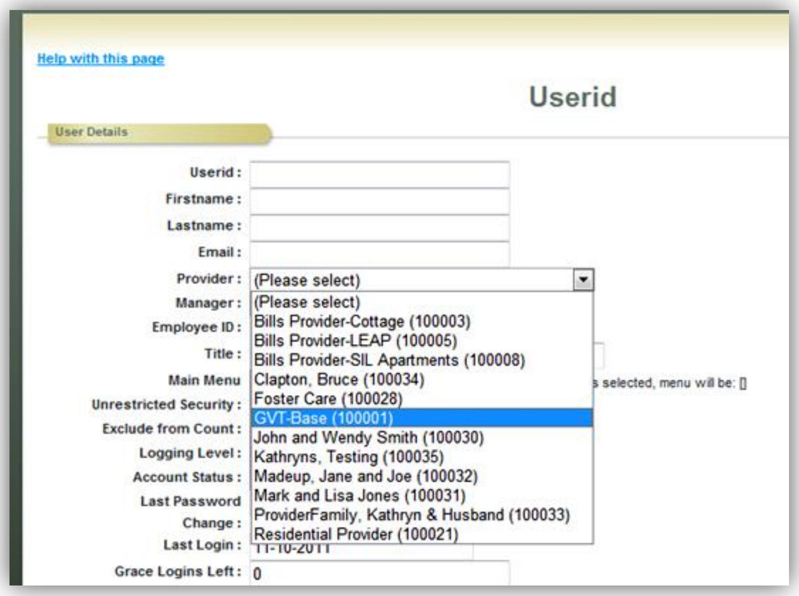


You can choose to display which users are assigned to each group as well to help in your process.



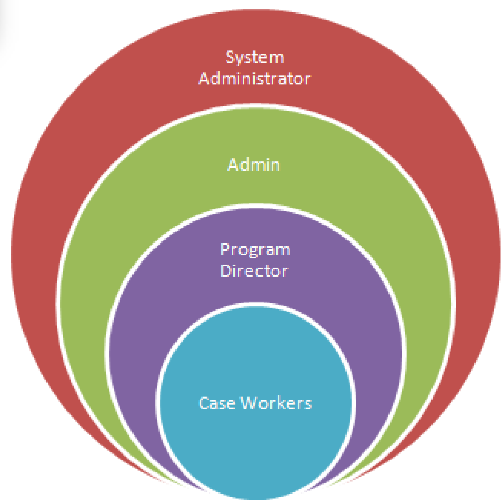
For a group that does not currently have access and needs it you can change the setting from "No Security Selected" to the appropriate level of access based on that group's role within your agency.

If a group has access to a form that goes against your business rules you can change their setting to "No Security Selected" which will prevent that group from navigating to the form at all.



Security by Provider Assignment

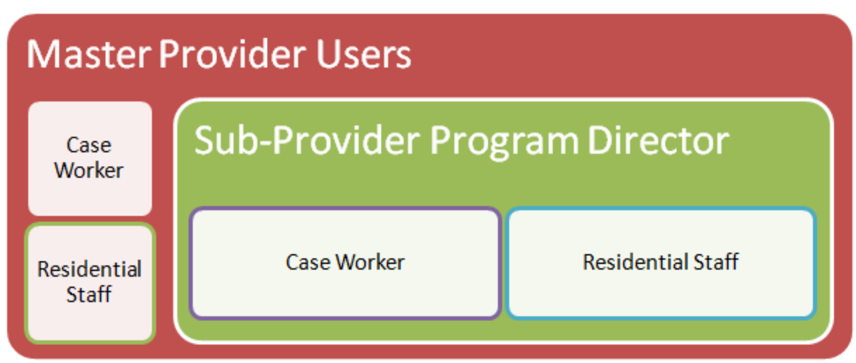
Your organization may choose to set up more than one Provider record to differentiate between locations where programs are administered. Every system begins with a Master Provider (your agency). Foster Care and Adoptive families are also set as Providers in your system.



To ensure that all of our systems are HIPAA compliant, a rule has been set to restrict users to viewing and interacting with client records based on the users' Provider assignment as determined on the UserID setup screen.

For agencies with more than one Provider established in the system, only those users assigned to the Master Provider (typically code 100001) will have access to all client records in the system. Further restrictions exist within User Security Groups that narrow the level of access granted.

Users assigned to a Provider other than the Master Service Provider will see only clients who have active placements with their Provider.



To understand the relationship between Provider, Group and User as they pertain to security it is important to realize that the Provider setting trumps others.

Next is the security group the user is assigned to, followed by any user specific settings that are in place.

Form Configuration

With FAMCare you can personalize the existing forms in the system. There are three ways you can personalize your forms:

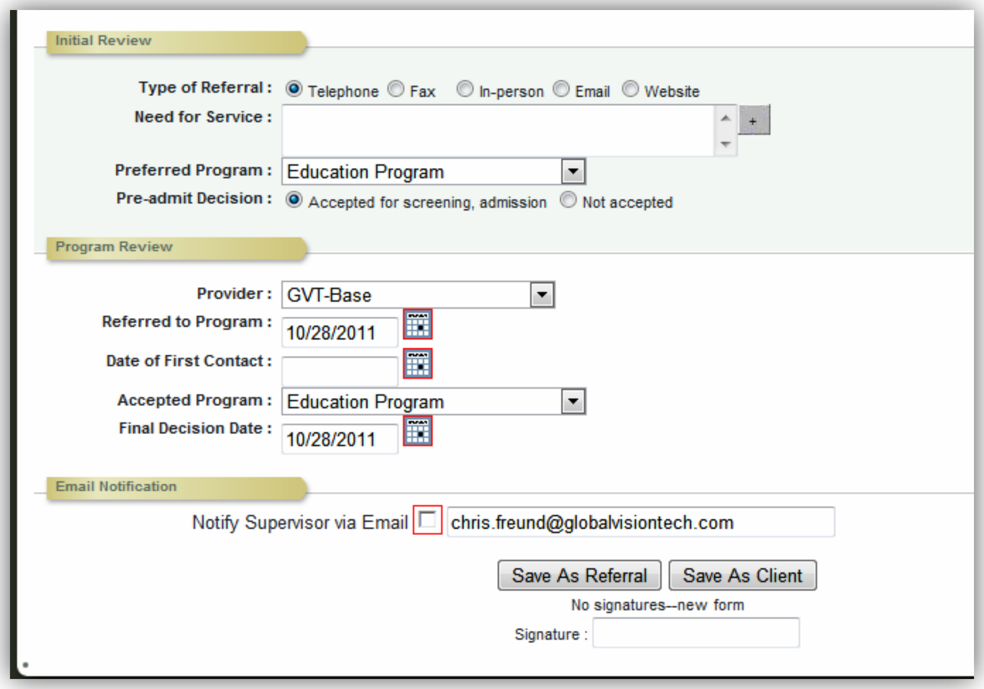
- Field Label Changes – Each of the fields on a form have been pre-named based on industry standards, however – you can change the name of the fields to meet your preference. For example – "Street Address" can be changed "Street" or "Address".
- Field Hide – On each form you have an option to show/hide certain fields, based on your requirements. For example – a standard field may include "weight", however if you don't collect that information, you can hide the field from a form.
- Drop Down Elements – Certain fields are configured as "selector fields" that you choose from a drop down or pull down menu, rather than a fill in text box. These types of fields typically have a list of choices associated with them that you can choose from when entering data. With FAMCare – you can modify these fields, change the name, delete or add new – based on your requirements.

Adding a Test Client

In order to use the form configuration tool – you will need to first add a test client (should no clients exist in your system at that time). If you already have a client in the system – then skip to the "Configuring Your Forms" section below.

Step One:

- Go to the FAMCare button from the main navigational menu and choose "Client Select".
- If this is your first time using FAMCare – click the "Start New Intake" button, which starts the Referral/Intake process and brings you to the "Referral/Intake" form.
- In order to successfully complete the test data client – for this example, under "Status", choose – "Accepted". Enter you test data accordingly. For this example – under "Initial Review"… choose "Pre-Admit Decision" as "Accepted for screening, admission."



Once you have entered in your referral information – click the "Save As Client" button.

Once the screen refreshes – you'll see the new client in the table as shown below:

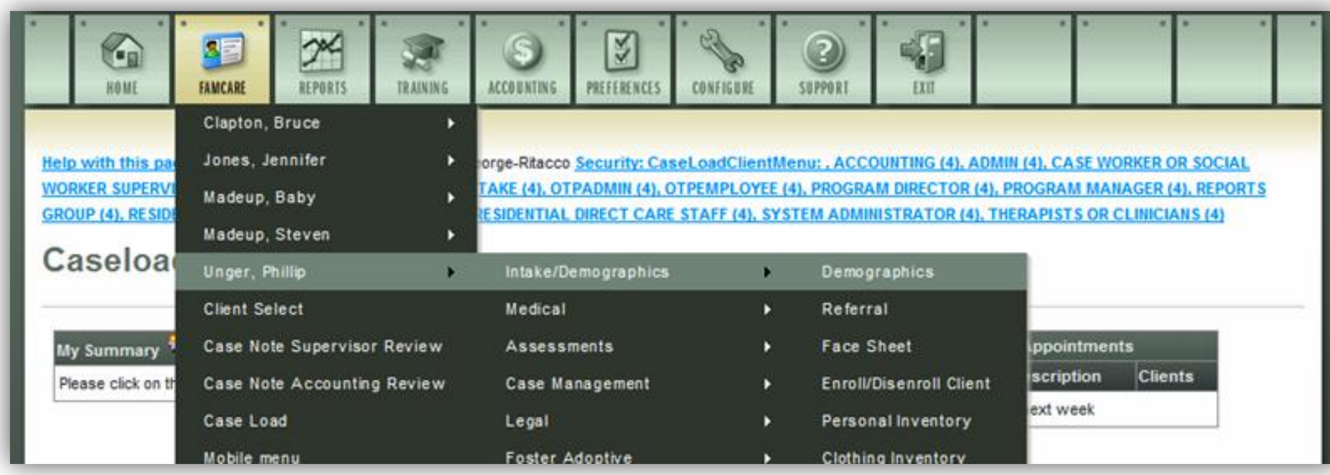
Name (click to select)	Case Load Functions		Client Type	Quick Info	Birth Date	Race	Gender	Pic
Unger, Phillip	Add	Add then View Caseload	Client	Quick Info	11/10/1999	White	Male	

Click the link "Add then View Caseload". Now you're ready to configure your forms.

Step Two:

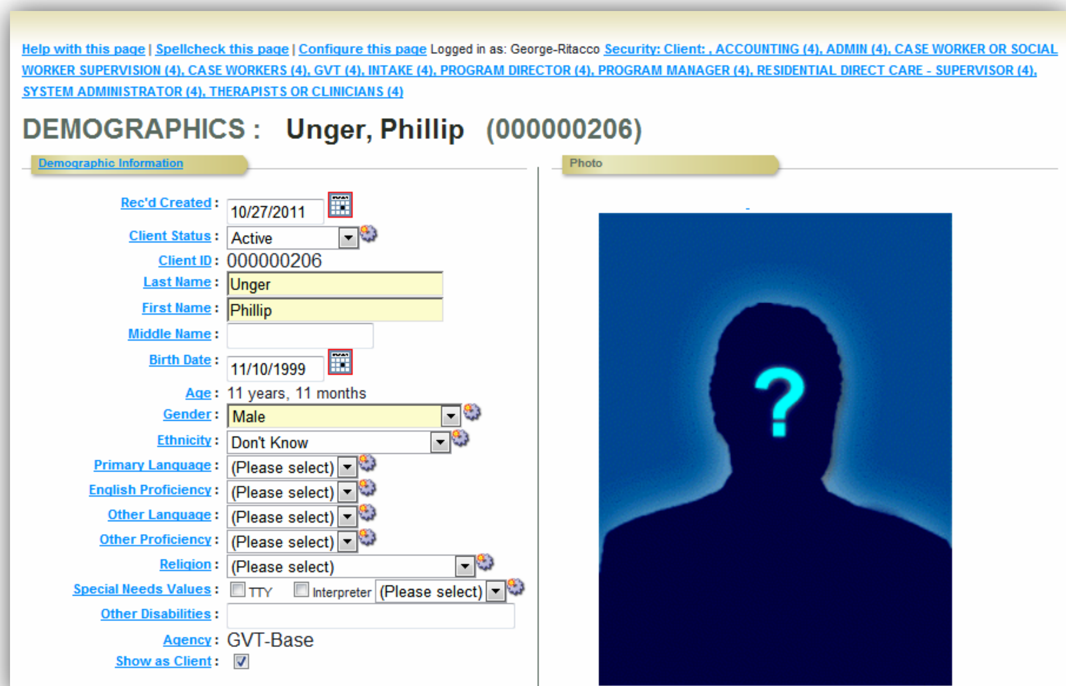
Click the "Preferences" button from your main menu. Choose the sub menu option "Enable Form Configure Mode".

Next, click the FAMCare button from your main menu, and you should see your client listed in the sub-menu. Click on the client's name and the subsequent arrows to get to the form you'd like to configure. For this example – click forward until you see the Intake/Demographics and then to the "Demographics" form as shown below.



Configuring Your Forms

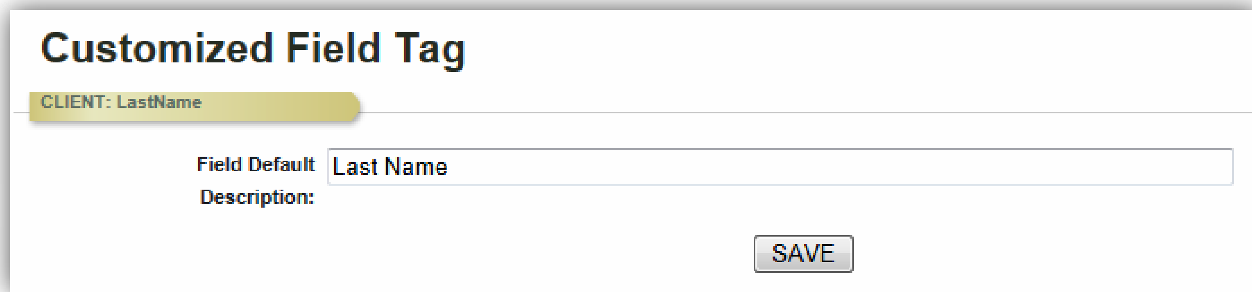
Your demographics form for this client will look like this:



Step One: Changing Field Names

Your first step will be to review the field names to see if there are any changes you'd like to make. Field Label Changes – Each of the fields on a form have been pre-named based on industry standards, however – you can change the name of the fields to meet your preference. For example – "**Street Address**" can be changed "Street" or "Address". NOTE – remember, you do not have to change any field names if you don't want to. Also – changing a field name does not change the type of field it represents. As an example – do not change "Street Address" to "Birth Date" as each field is tied to your systems data dictionary and database. Making a change like this will cause errors in your system.

To change a field name – click on the blue hyperlink of that field name. Doing so will bring you to that field's name editor.



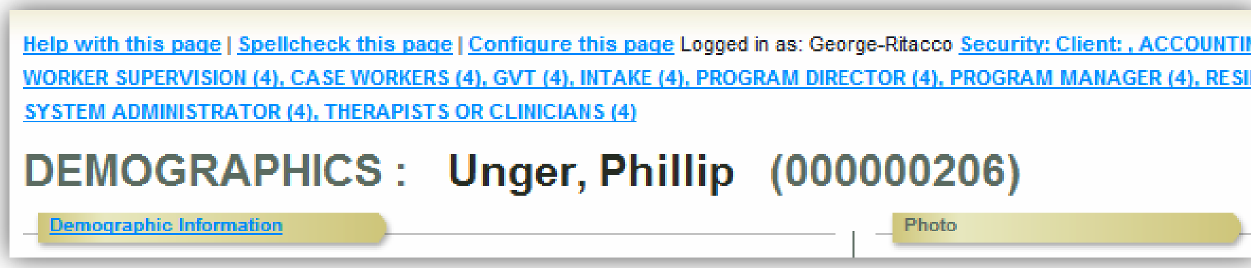
In the "Field Default" field – just type in the name you'd prefer for this field. In this field – changing "Last Name" to LName" would be acceptable. Changing "Last Name" to "First Name" wouldn't be.

Once you've made the change – your new name will show up on the form. In addition – your new field name tag will be passed through the data dictionary representative of this form and your reporting tools.

Step Two: Hiding Fields

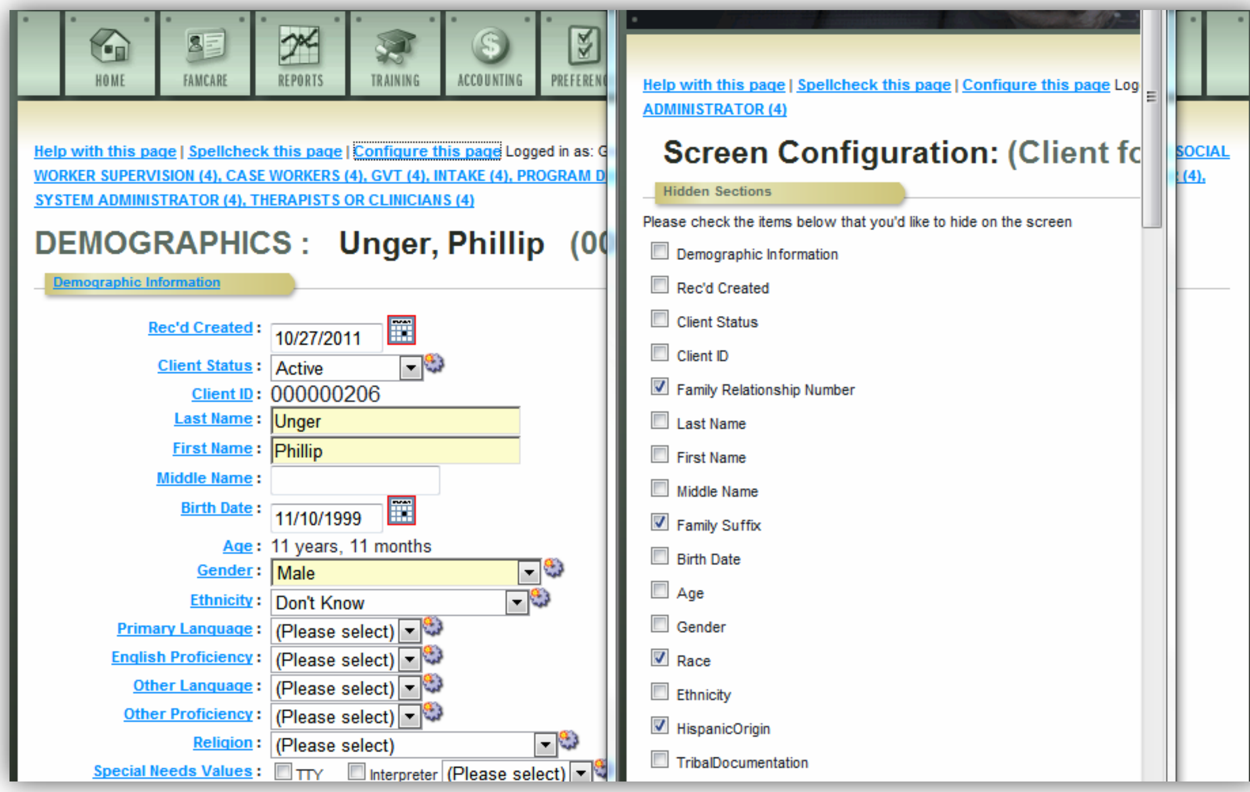
On each form you have an option to show/hide certain fields, based on your requirements. For example – a standard field may include "weight", however if you don't collect that information, you can hide the field from a form.

To see the master list of fields for this form – click the "Configure this page" blue hyperlink at the top of the form, as shown below:



Clicking the link will open up a new window called "Screen Configuration" that will show a master list of fields on your form.

To hide a field – check the corresponding box.

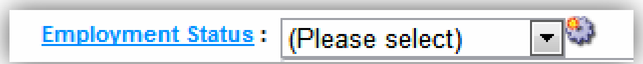


Un-checking a box – will make the field appear on the form. By default – there are certain fields checked and unchecked. Feel free to personalize each form based on your requirements.

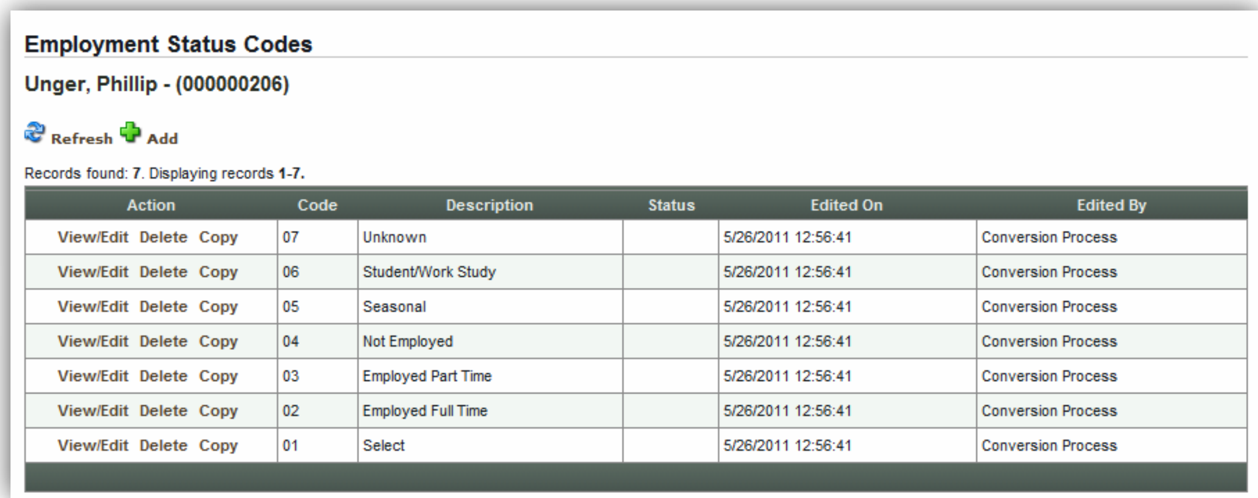
Step Three: Drop-Down Elements

Certain fields are configured as "selector fields" that you choose from a drop down or pull down menu, rather than a fill in text box. These types of fields typically have a list of choices associated with them that you can choose from when entering data. With FAMCare – you can modify these fields, change the name, delete or add new – based on your requirements.

To view or modify an existing drop down table – click on the small gear icon next to the field you'd like to view/modify.



In this example – we'll look to view/modify the "employment status" drop down field. Once you click on the gear icon – you'll be brought to "Employment Status Codes" screen.



Employment Status Codes

Unger, Phillip - (000000206)

Refresh Add

Records found: 7. Displaying records 1-7.

Action	Code	Description	Status	Edited On	Edited By
View/Edit Delete Copy	07	Unknown		5/26/2011 12:56:41	Conversion Process
View/Edit Delete Copy	06	Student/Work Study		5/26/2011 12:56:41	Conversion Process
View/Edit Delete Copy	05	Seasonal		5/26/2011 12:56:41	Conversion Process
View/Edit Delete Copy	04	Not Employed		5/26/2011 12:56:41	Conversion Process
View/Edit Delete Copy	03	Employed Part Time		5/26/2011 12:56:41	Conversion Process
View/Edit Delete Copy	02	Employed Full Time		5/26/2011 12:56:41	Conversion Process
View/Edit Delete Copy	01	Select		5/26/2011 12:56:41	Conversion Process

Each of the elements in the table represents a drop down choice for this field. Under the "ACTION" column to the left – you have the ability to View/Edit, Delete, or Copy a choice item.

If you choose to add a new item – you can do so by clicking the green plus sign that is above the table. Let's add one now.

Once you click the "add" button – you are brought to the "Employment Status Codes (Mater Table) form. As you can see – a status code number is already assigned for you.

All you need to do is to type in the description of the new choice item and select a status of ACTIVE or INACTIVE.

Employment Status Codes (Master Table)

Employment Status Codes

Code: 08 (this is the next available number, you can override it)

Description:

Status: (please select)

If the status is ACTIVE, the choice item will appear in the table and will be added to the form. Consequently INACTIVE choice items will not appear. NOTE: you can always choose to INACTIVE existing choice items over DELETING them in the future.

Let's say we wanted to add a choice item such as "6 month employment".

Employment Status Codes (Master Table)

Employment Status Codes

Code: 08 (this is the next available number, you can override it)

Description: 6 month employment

Status: Active

Once you save this new addition – you will be directed back to the Employment Code table. In addition – your new choice element is now part of your form and can be seen as a new drop down element for that field.

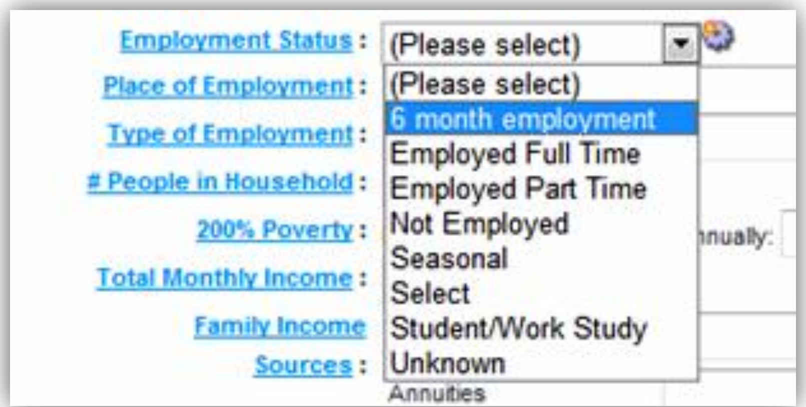
Employment Status Codes

Unger, Phillip - (000000206)

Refresh Add

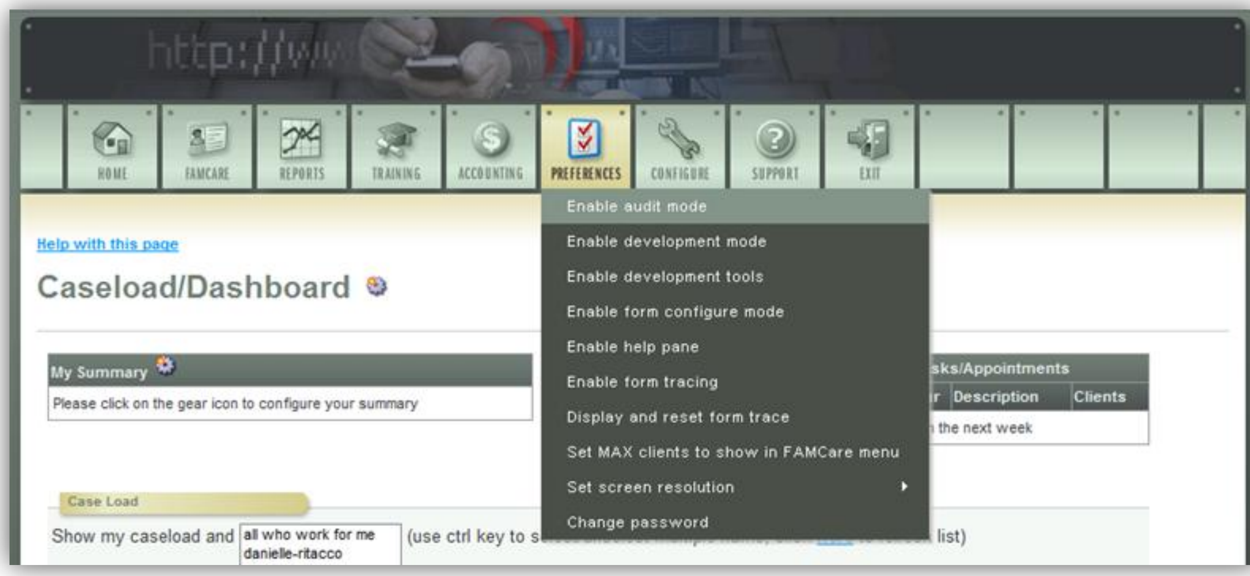
Records found: 8. Displaying records 1-8.

Action	Code	Description	Status	Edited On	Edited By
View/Edit Delete Copy	08	6 month employment	Active	10/28/2011 11:43:44	George-Ritacco
View/Edit Delete Copy	07	Unknown		5/26/2011 12:56:41	Conversion Process
View/Edit Delete Copy	06	Student/Work Study		5/26/2011 12:56:41	Conversion Process
View/Edit Delete Copy	05	Seasonal		5/26/2011 12:56:41	Conversion Process
View/Edit Delete Copy	04	Not Employed		5/26/2011 12:56:41	Conversion Process
View/Edit Delete Copy	03	Employed Part Time		5/26/2011 12:56:41	Conversion Process
View/Edit Delete Copy	02	Employed Full Time		5/26/2011 12:56:41	Conversion Process
View/Edit Delete Copy	01	Select		5/26/2011 12:56:41	Conversion Process

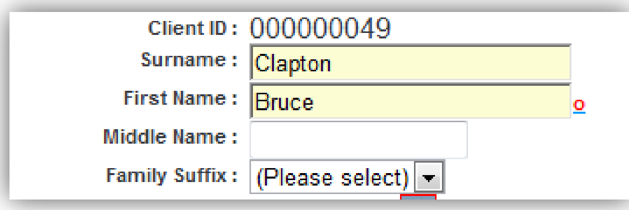


Part of the form configuration process is to repeat these steps for each form you'd like to modify.

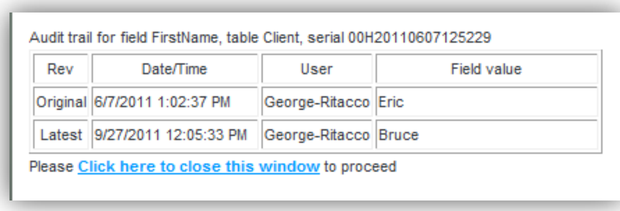
Preferences Menu



FAMCare includes a "Preferences" section that enables **administrators** to set certain criteria related to functionality or modes, and/or set initial preferences on how they would like to use the system. Please note: Depending on your security and the modules you've purchased, some of the options may not apply.



Enable Audit Mode – enabling this feature allows you to see any field that has been changed and re-saved on a client's record. To "enable" – just click the link and bring up the form you'd like to "audit".



Clicking on the small red circle will bring up a table with details on the "Original" field value and a trail of the all of the revisions – date they were changed and by whom.

Once you have completed your audit "review", don't forget to "Disable Audit Mode" by going back into Preferences and clicking the "Disable Audit Mode Link".

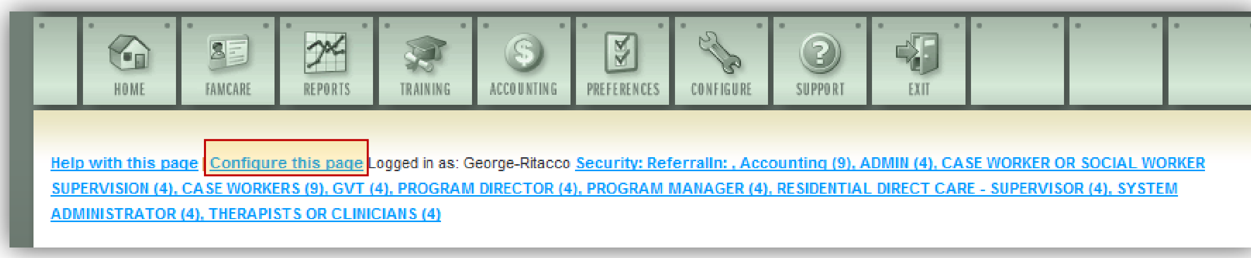
Enable Development Mode – enabling this feature will allow you to review any changes or modifications in your system before they are pushed to "Live". You will be advised by your project management team when you will need to review any new work under this feature.

Enable Development Tools

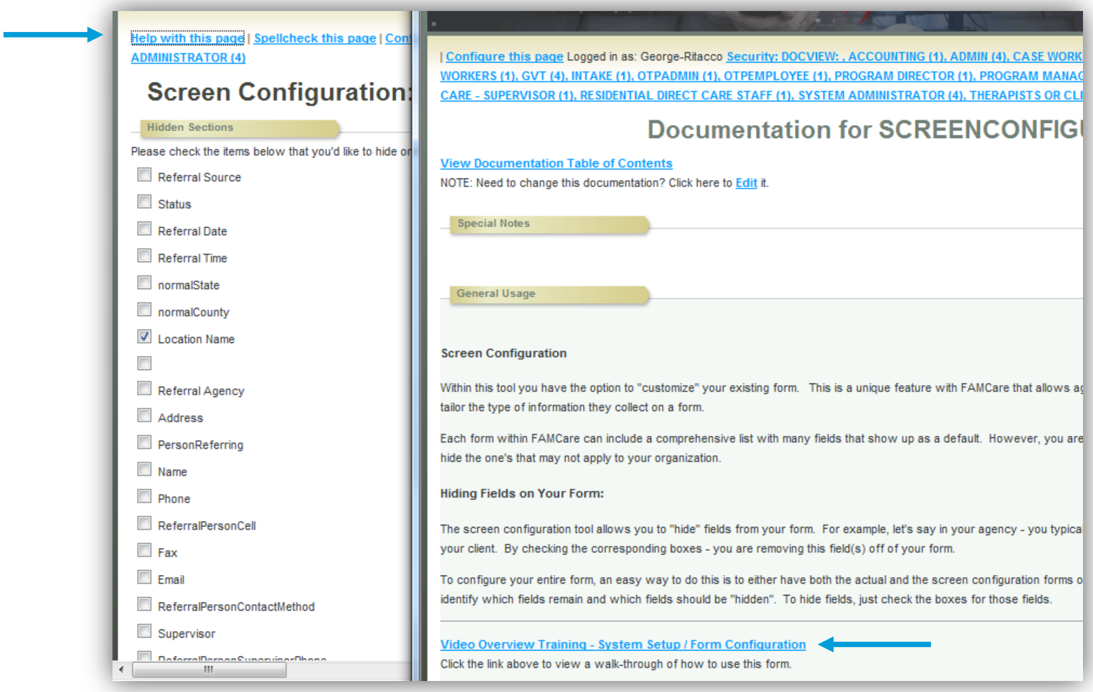
This is reserved for those system administrators and I.T. professionals who have been certified as a FAMCare developer by attending the Visions Server Certification Course. Those individuals will be provided with materials and documentation to effectively use this option.

Enable Form Configure Mode

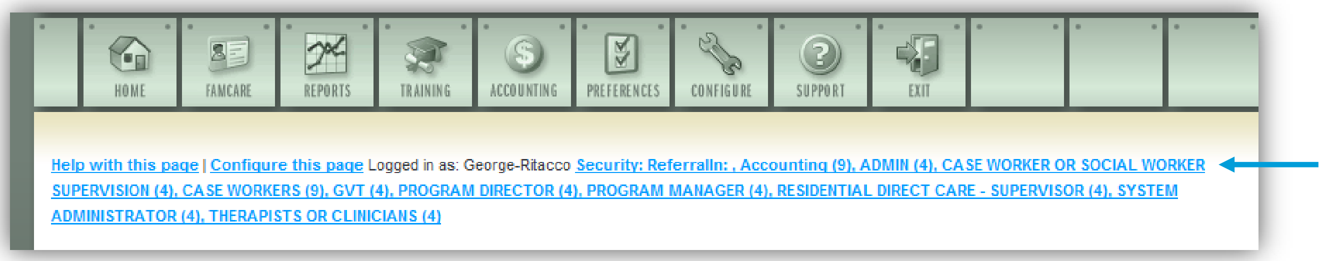
This feature will allow you to get access to the FAMCare **Configurator** tool and to set **Security** in your system for your user groups at the form level. Once you have enabled this preference, navigate over to the form you would like to "configure" or set "security" for.



Once you've pulled up the form you'd like to work with – at the top of the form you'll see a new set of links. To configure the form – click on the link **"configure this page".** A new window will open called **"Screen Configuration".** At the very top of this page is a **"help with this page"** link. Click that to see instructions on how to "Configure" a form. There is also **a video** on the help which is very helpful and will walk you through the process

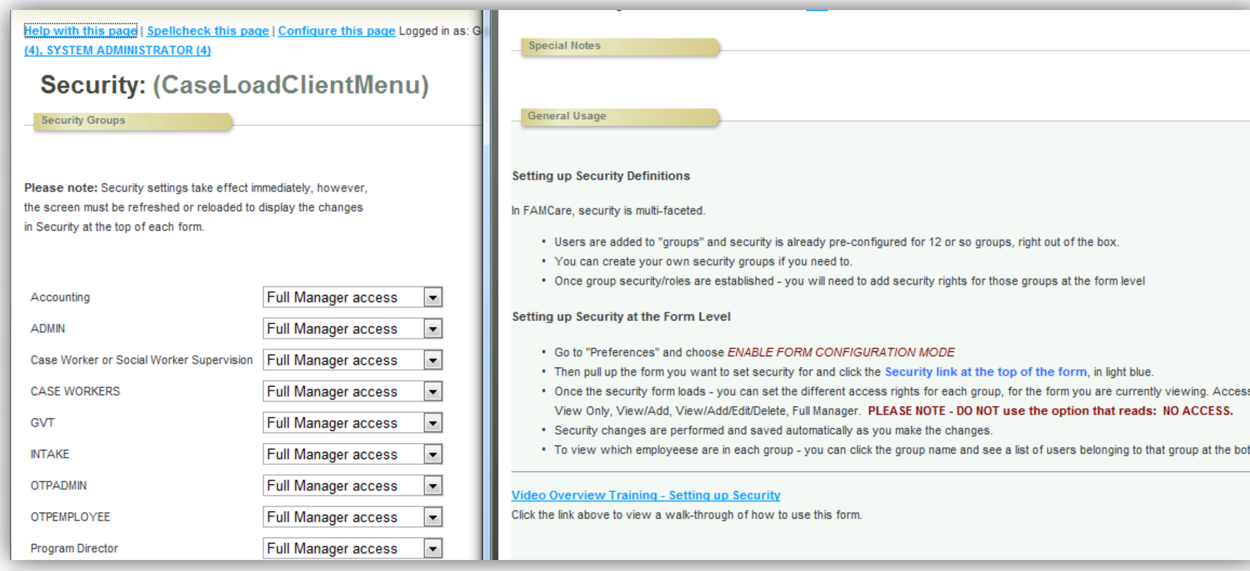


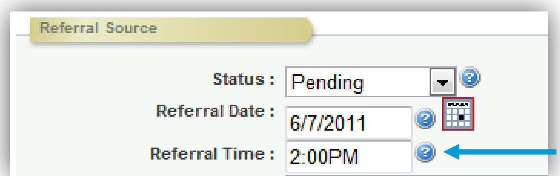
Enabling form configuration mode also allows you customize security for each form. In the same manner described above at the top of each form there will be a separate link to view and change security settings.



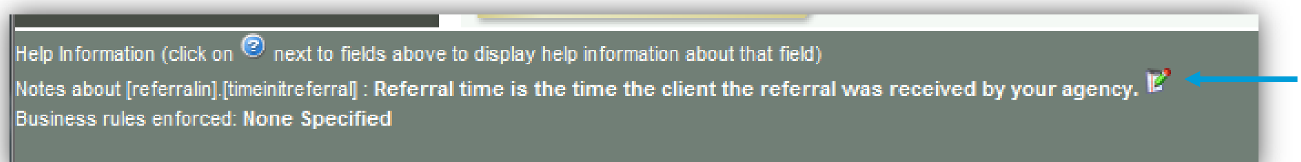
Clicking on the link highlighted above will bring you to the security settings for that form.

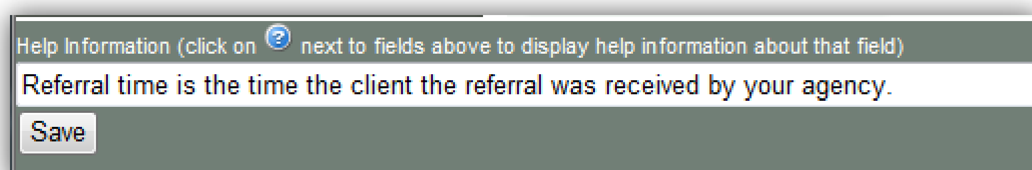
A new window will open called **"Security".** At the very top of this page is a **"help with this page"** link. Click that to see instructions on how to "set security" for a form. There is also **a video** on the help which is very helpful and will walk you through the process.





Enable Help Pane – By enabling this preference, the system automatically adds a series of questions marks to your form view – next to each data point or field in the system. If a user clicks on a question mark – the description of the field can be viewed on the bottom of the screen in an information bar.



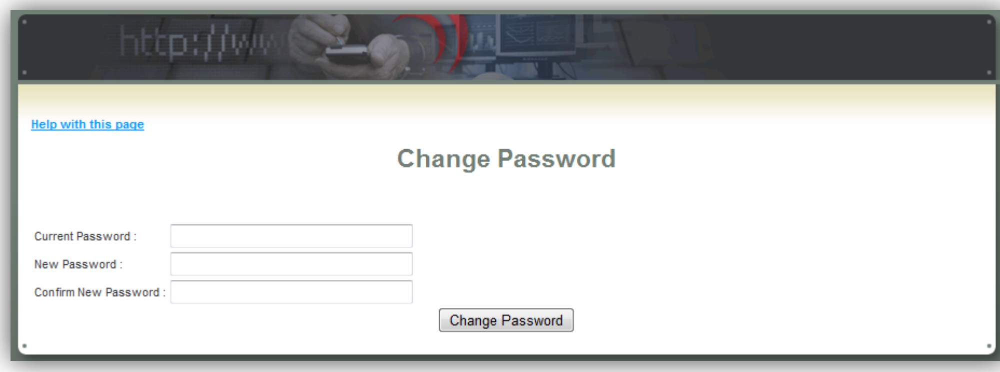


As an administrator, you have the ability to edit, update and add to this section by clicking the "pen and paper" icon. Once you add information or make a change – remember to save the information.

Set Max Client to Show in FAMCare – As you add clients to your caseload or view client records, FAMCare retains a "recent client list" under the FAMCare button. By selecting the "Max Client to Show" link, you are brought to a form where you can choose how many clients you'd like to see be default in the list. You can choose from 1, 5, or 10 clients, as a preference. While most of the preferences listed in FAMCare are for the administrator of the system - this option is typically opened to all users of the system by default.

Set Screen Resolution – There are two screen resolutions you can choose from that you can set here. Choose the resolution that best suits your system needs. While most of the preferences listed in FAMCare are for the administrator of the system - this option is typically opened to all users of the system by default.

Change Password – if you need to change your password you can do it from here. While most of the preferences listed in FAMCare are for the administrator of the system - this option is typically opened to all users of the system by default.



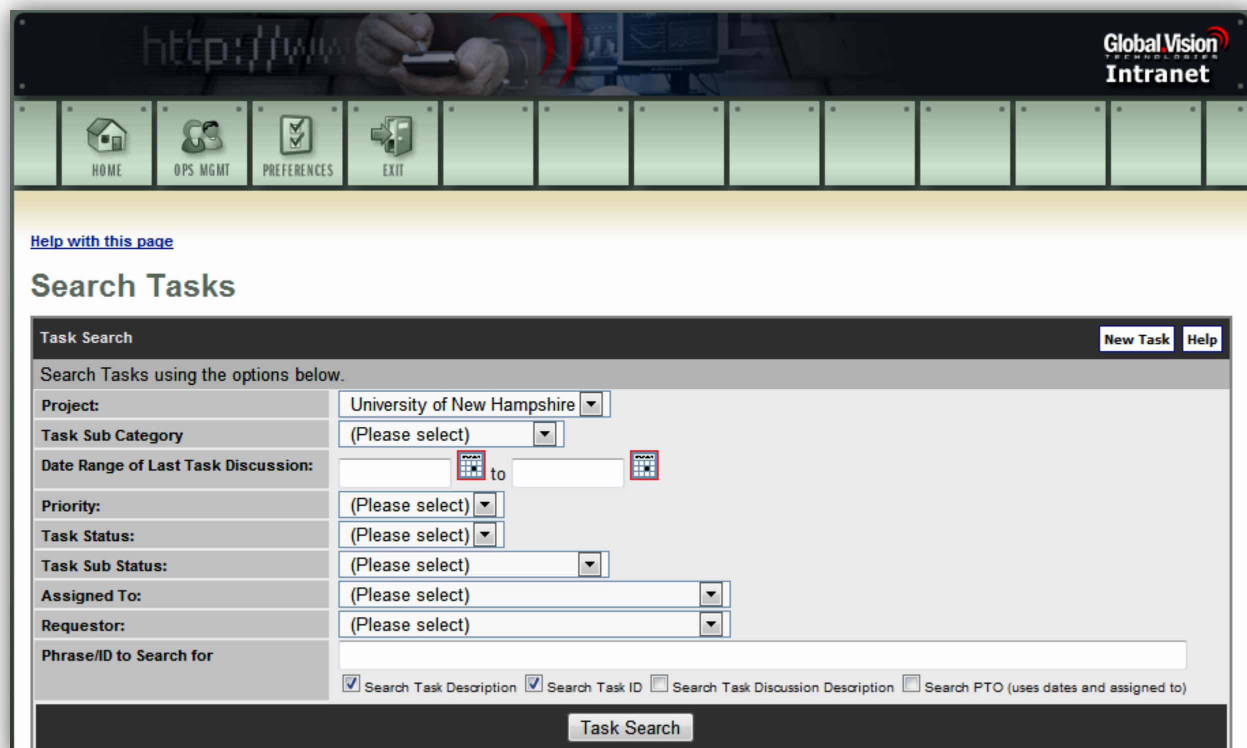
Task Manager

Client Project / Issue Management Portal

To access Task Manager – visit http://intranet.globalvisiontech.com then login with your userid and password.

Searching Tasks

When you first log in – you are brought to the Search Tasks screen. From here you can search through existing tasks for your organization. To create a new task, click the New

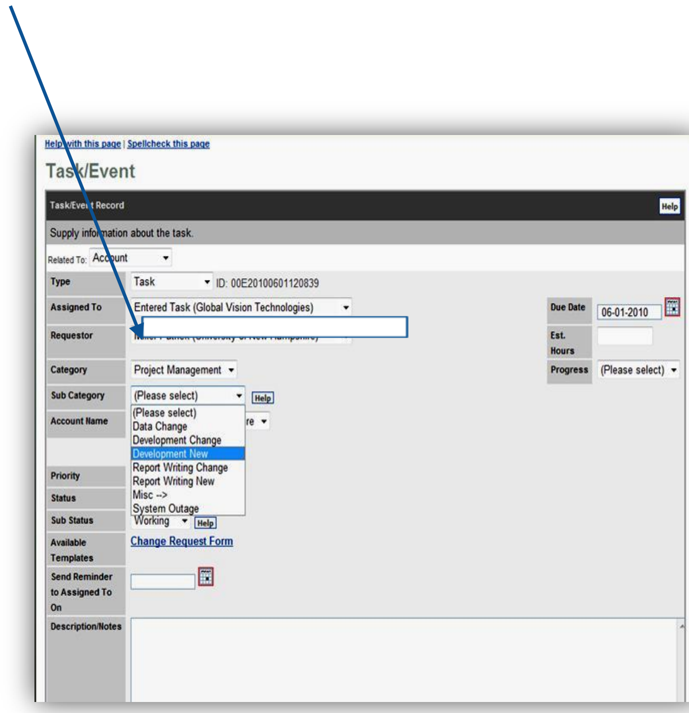


Task button.

Creating a New Task

Starting with "Requestor" – choose yourself from the drop down list and fill in the accompanying fields such as:

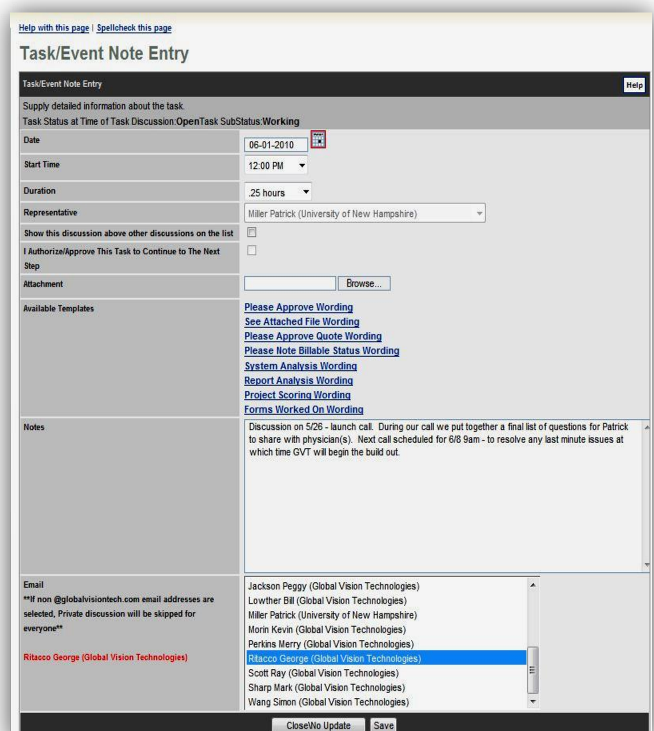
- Category
- Sub Category
- Account Name (typically your organization)
- Priority
- Status & Sub Status
- Send reminder email
- Due date
- Est. hours
- Progress



After you add your task description information, you can save the task record.

The next step is to enter your project comments, notes or details (as seen on the next screen) – also known as your **task discussion notes.**

Task Discussion Entry

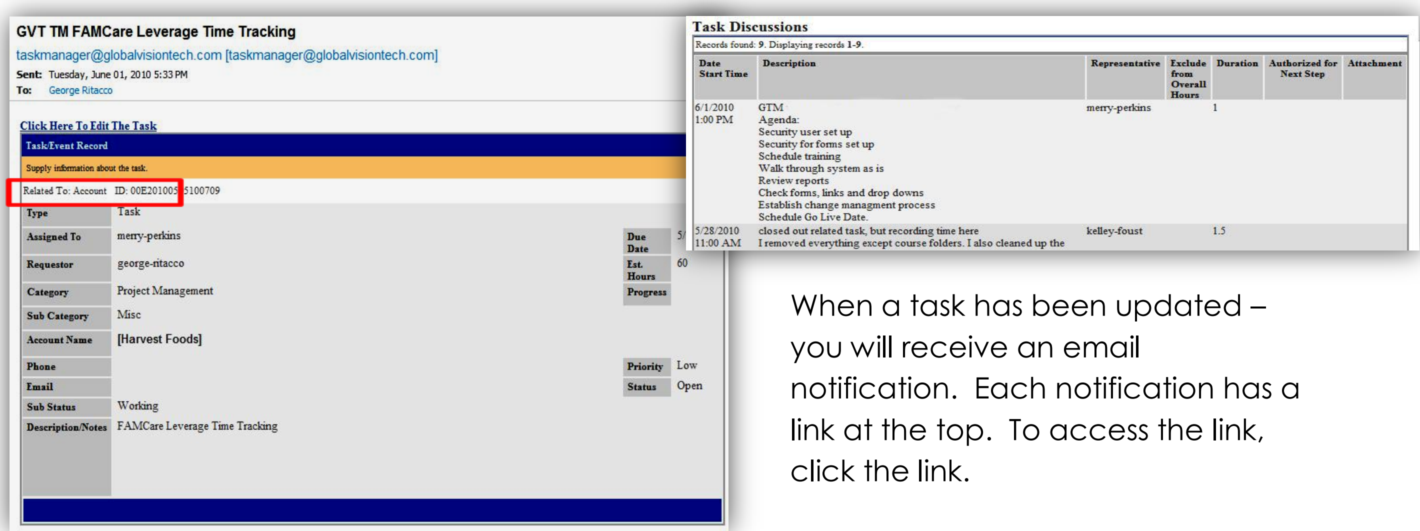


To enter in a new discussion for this task – fill out the form, upload any accompanying documentation such as a Word document or screen capture.

Add your notes or instructions.

You can direct your message to your support specialist by selecting their name from the list. To select multiple, click CTRL and the each recipient's name. As you select a recipient from the list, their name will appear **in red** to the left.

Email Notification

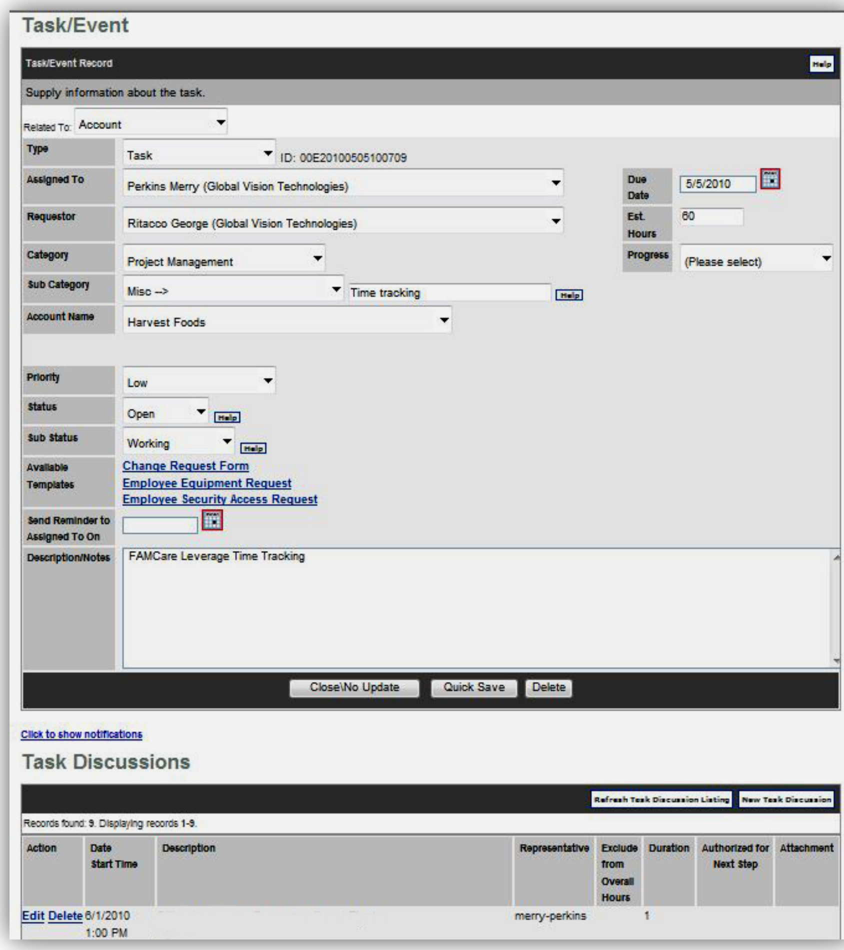


When a task has been updated – you will receive an email notification. Each notification has a link at the top. To access the link, click the link.

Task Editing/ Updating

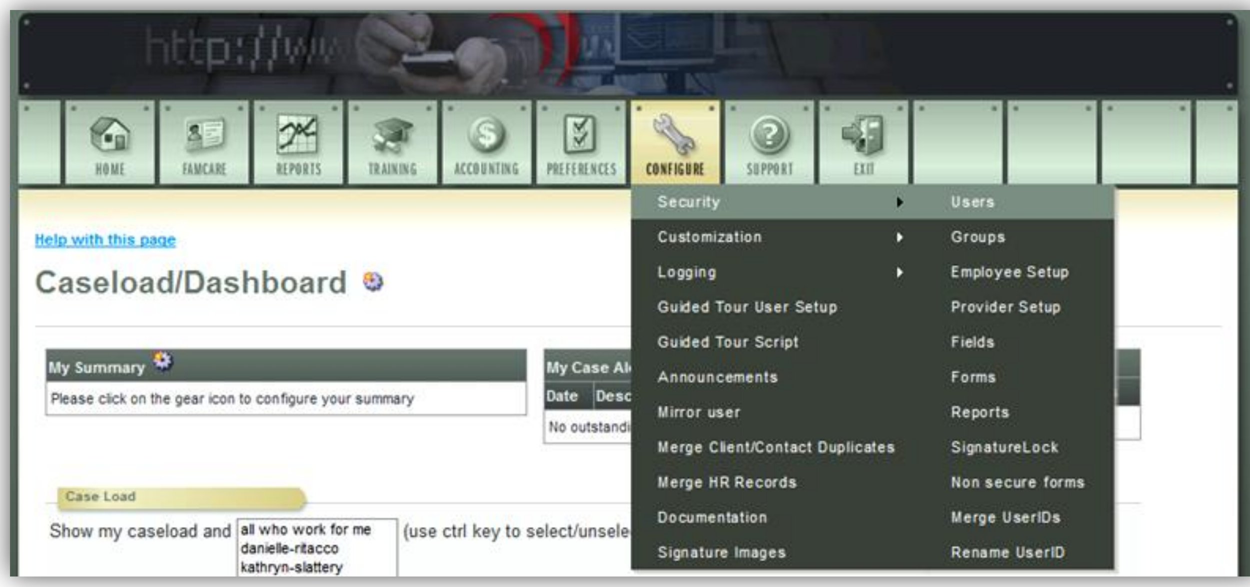
Once you log in – you are brought directly to your task.

From here you can review updated task discussions, comments, uploaded files and notes and/or add a new task discussion.



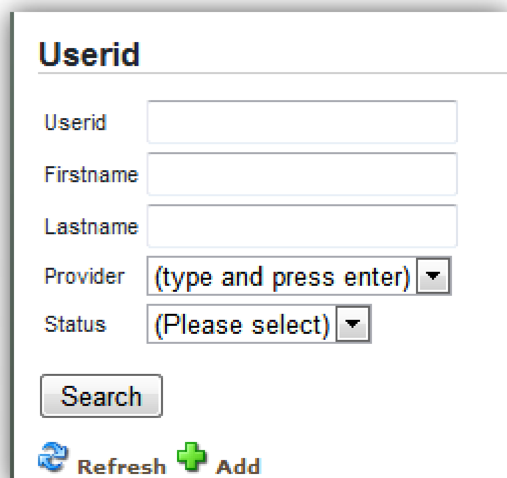
Creating User Id's

To create a new user ID – from the FAMCare main navigation – go to Configure > Security > Users



Search for a User

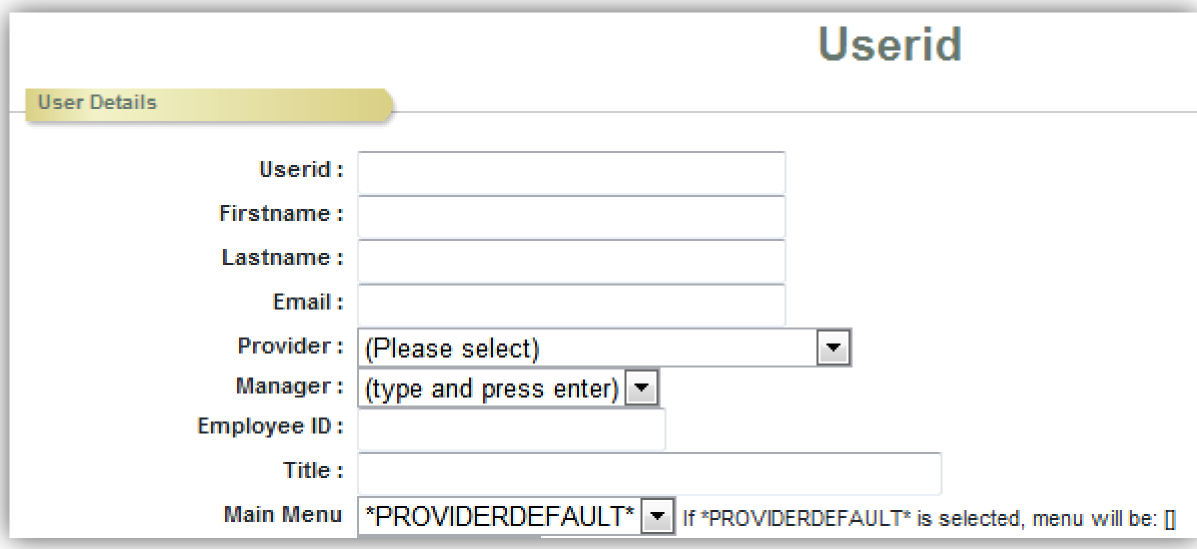
Next – you'll need to do a quick search to confirm the user you want to add – doesn't already exist in the system. If the user is not in your system, click on the ADD .



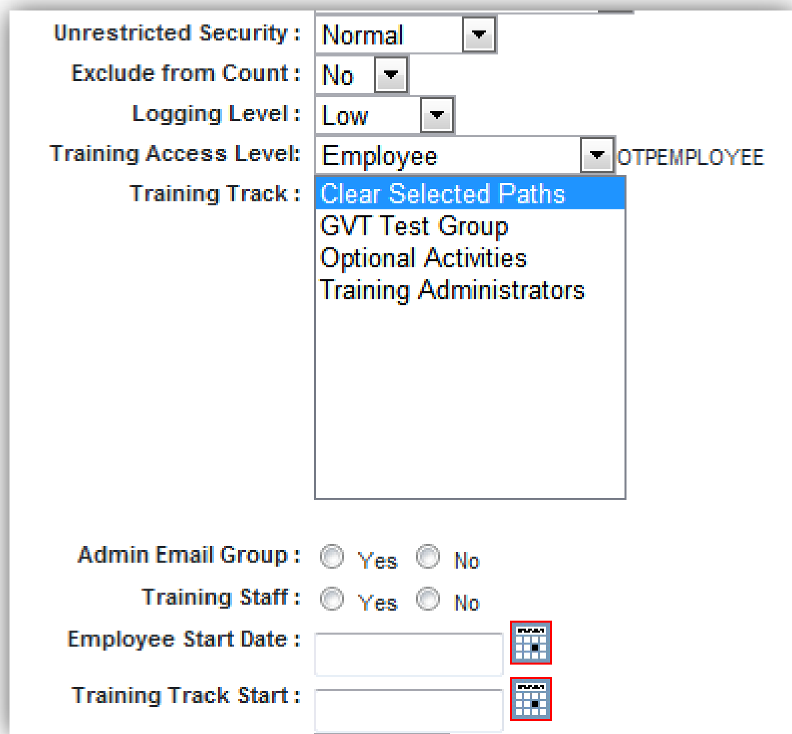
Add a New User

From here – you can fill out the USER ID form accordingly:

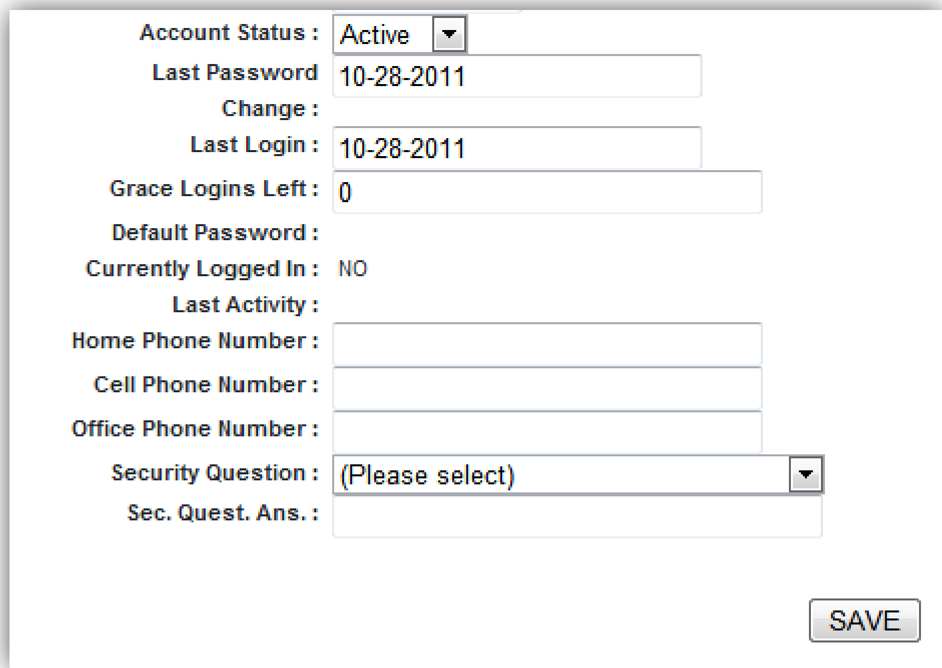
- ✓ User ID is firstName-lastName
- ✓ Only one userID per email address – email address is required
- ✓ Provider – must choose one – for agencies with more than one listed – note that only those users assigned to the "Master Provider" (code 100001) will be able to access all clients – otherwise access will be limited to clients for which placements have been created under that particular provider
- ✓ Manager – type a few letters of the manager's name and press enter, then choose their name from the list. The list is made from userIDs already in the system, so if you don't see your manager there then they do not have an existing userID
    - o Some functions in the system allow managers to view caseloads and notes of those for whom they are listed as Manager
- ✓ Employee ID is optional – for internal agency stuff only
- ✓ Title is optional
- ✓ Main Menu should be "Primary"
    - o Each user can determine whether to use caseload or client search screen for their main menu once they log in



- ✓ Can leave the following at their default settings
  - Unrestricted Security – Normal
  - Exclude from count = no
  - Logging Level – low
- ✓ Training Access Level – all Base customers (Connect customers) will want to use "Employee" regardless of their position in the organization unless they purchase the Learning Management Module.
- ✓ Training Track – admin users use Training Administrators
  - Non admin users use Optional Activities
- ✓ Leave the following alone (unless you buy OTP)
  - Admin Email Group
  - Training Staff
  - Employee Start Date
  - Training Track Start

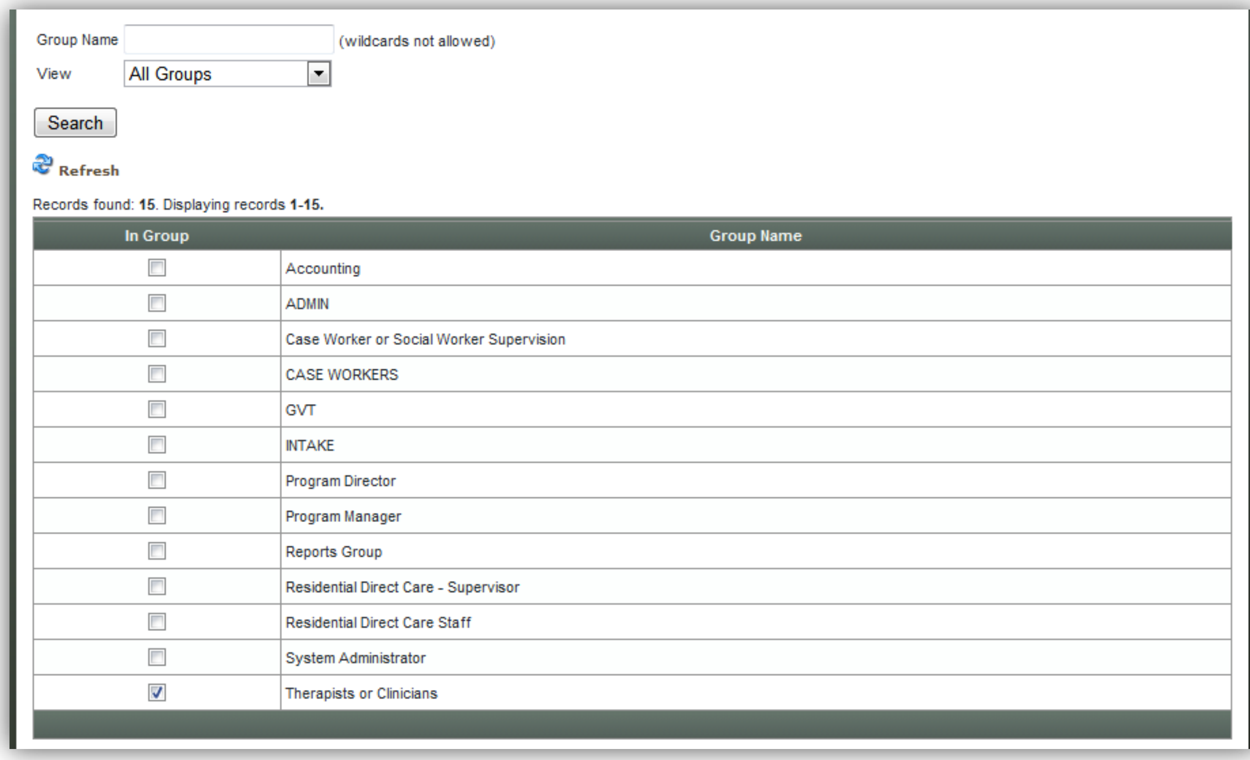


- ✓ Account Status
    - o Active is default – change to Inactive if a user leaves/gets fired/turns out to be criminally insane….you're proofreading this, right?
- ✓ Phone numbers are optional – but useful internally
- ✓ Security question and answer – leave these blank. When a new user logs in for the first time – they will be asked to set the question and answer for themselves.
- ✓ Click Save to create the record – but must choose Group Membership before calling it quits



Setting Group Membership

- ✓ Scroll down the form and click "Edit" under **Group Membership**
    - o Refer to the security guide to determine which group(s) to place the user in



Group Name (wildcards not allowed)
View All Groups

Search

Refresh

Records found: **15**. Displaying records **1-15.**

In Group	Group Name
☐	Accounting
☐	ADMIN
☐	Case Worker or Social Worker Supervision
☐	CASE WORKERS
☐	GVT
☐	INTAKE
☐	Program Director
☐	Program Manager
☐	Reports Group
☐	Residential Direct Care - Supervisor
☐	Residential Direct Care Staff
☐	System Administrator
☑	Therapists or Clinicians

- Check off the group(s) then click "Save" at the bottom of that form

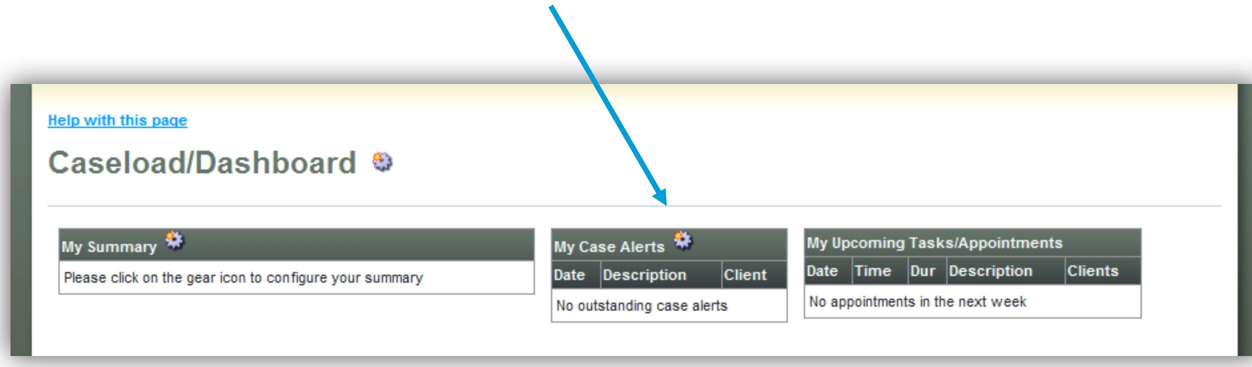
Case Alert Wizard

The case alert wizard allows an administrator to create different case alerts based on your agencies rules and policies.

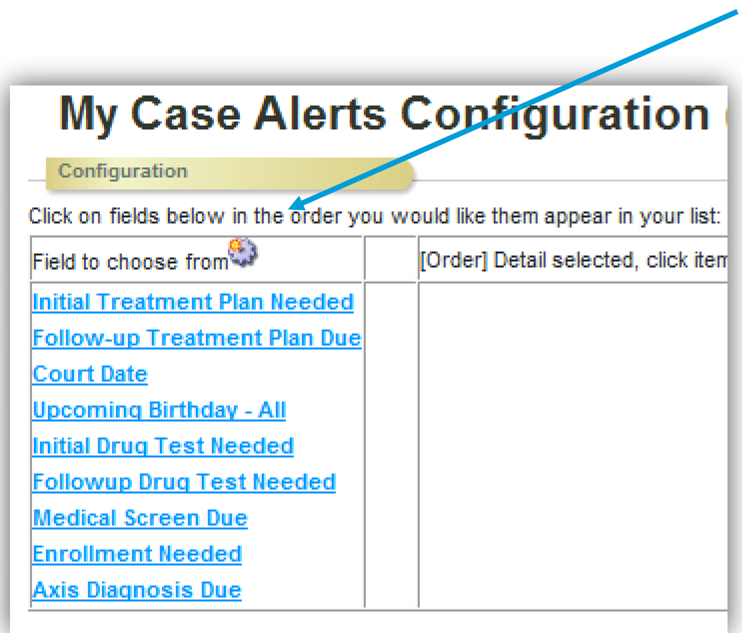
Accessing Case Alerts Configurator

Go to **preferences** and **enable form configure mode**. Then click HOME.

On the Case Alert box – click the "gear" icon.

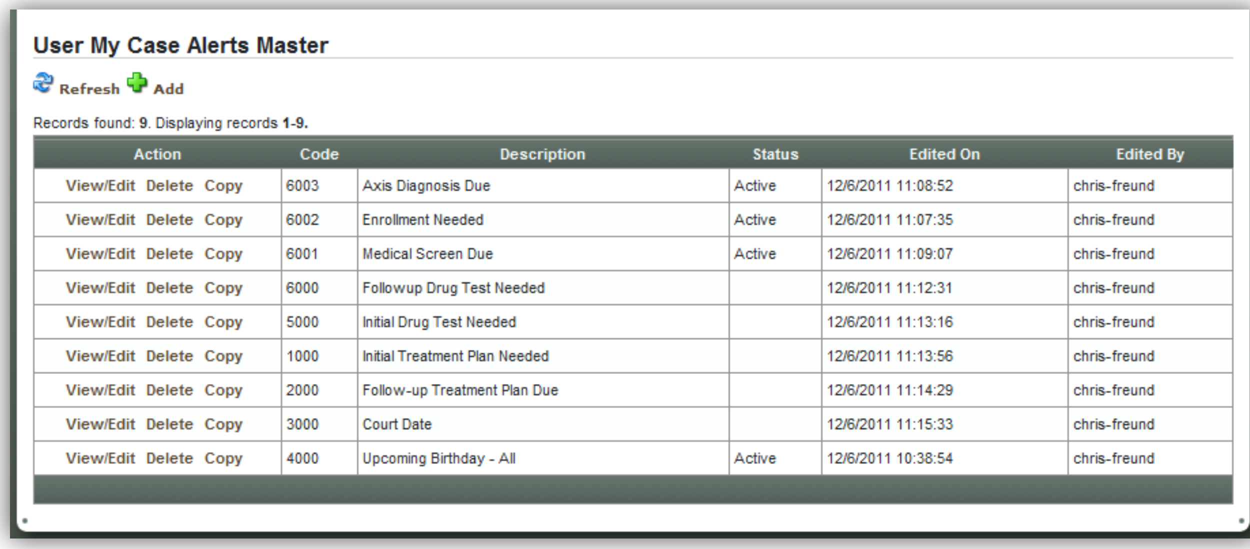


Once inside the configuration screen – click on the "gear" icon to enter the wizard.



Case Alerts Master

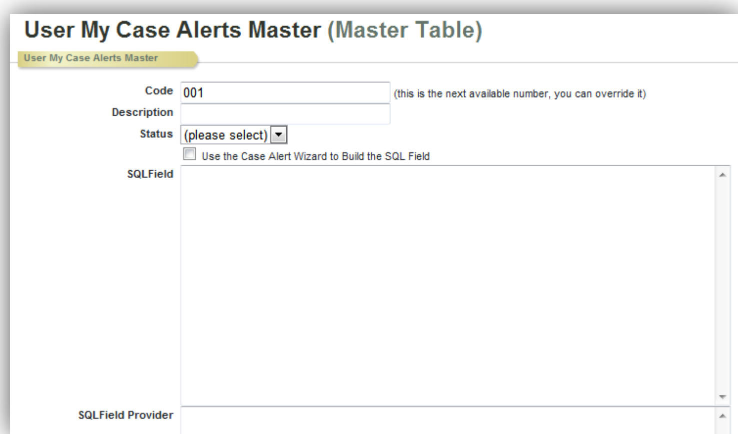
On the "Master" screen, you'll see a list of existing case alerts. From here you can edit existing case alerts (change their name, their setup, etc.,), delete, copy or ADD a new one. For the purpose of this exercise – let's add a new one. To create a new case alert, click the ADD plus sign .



Action	Code	Description	Status	Edited On	Edited By
View/Edit Delete Copy	6003	Axis Diagnosis Due	Active	12/6/2011 11:08:52	chris-freund
View/Edit Delete Copy	6002	Enrollment Needed	Active	12/6/2011 11:07:35	chris-freund
View/Edit Delete Copy	6001	Medical Screen Due	Active	12/6/2011 11:09:07	chris-freund
View/Edit Delete Copy	6000	Followup Drug Test Needed		12/6/2011 11:12:31	chris-freund
View/Edit Delete Copy	5000	Initial Drug Test Needed		12/6/2011 11:13:16	chris-freund
View/Edit Delete Copy	1000	Initial Treatment Plan Needed		12/6/2011 11:13:56	chris-freund
View/Edit Delete Copy	2000	Follow-up Treatment Plan Due		12/6/2011 11:14:29	chris-freund
View/Edit Delete Copy	3000	Court Date		12/6/2011 11:15:33	chris-freund
View/Edit Delete Copy	4000	Upcoming Birthday - All	Active	12/6/2011 10:38:54	chris-freund

The wizard allows you to create individual case alerts based on actions/forms completed for a client. For example – let's say you wanted to create a case alert for Treatment Plans. The rule would be that within 30 days of completing an Intake – you want a case alert to trigger for a case worker to complete a Treatment Plan.

The case alert wizard can be used to set any relationship between events.



You'll first need to assign a CODE number. Rule of thumb is as you create new alerts – you follow a specific numbering scheme that works for you. Note: You must use a new code for each new case alert you create (001, 002, 003, etc.,)

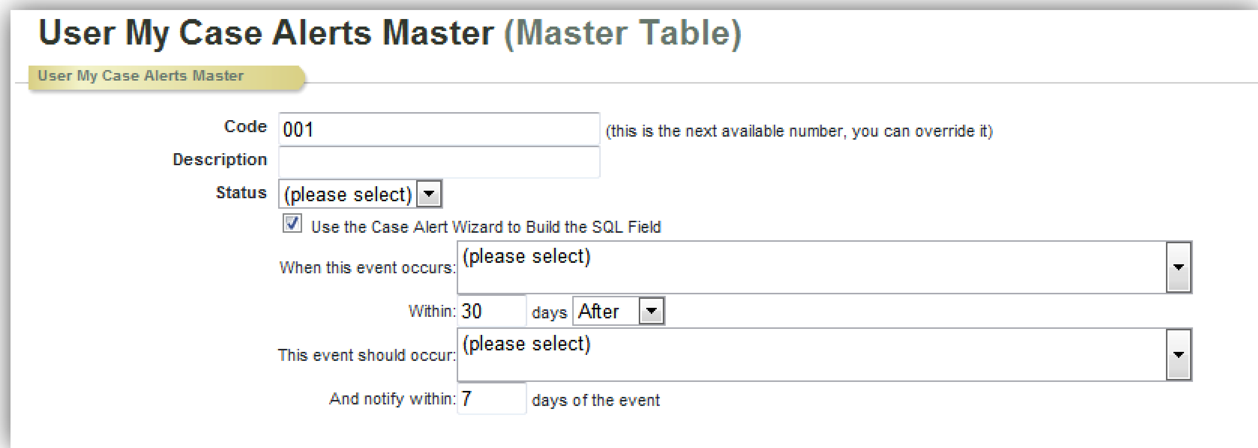
The DESCRIPTION is the name or type of case alert – e.g., Treatment Plan. You can set the

STATUS as Active or Inactive. Choosing Inactive removes the case alert from the caseworker dashboard as a choice.

If you are familiar with writing SQL statements, you can enter in the statement in the empty box, otherwise you can click the checkbox for "Use the Case Alert Wizard to Build the SQL Field".

Using the Case Alert Wizard to Create Your Case Alert

Once the wizard box is checked – a mini form opens.



Step One: Under "When this event occurs" – choose the beginning date to look at for the case alert, e.g,. Intake Date. The idea is that if you want something to trigger a certain time period in the future from the date of Intake… then Intake Date would be the field you choose here. If your "trigger" is as a result of a completed referral, then Referral Date would be your first event.

Step Two: Set the number of days as a before or after – for the first event.

Step Two: Under "This event should occur" – choose the event that needs to be the alert based on what happens in the first even you've chosen. So if a Treatment Plan alert is being created – you would look in the drop down for Treatment Plan Date… and select that as your second event.

In essence the alert would work like this: From the date of Intake… Within 30 days – alert the case worker that a Treatment Plan is due. You can also choose to notify the case worker X amount of days within the event.

When you're ready – you can save the new case alert.

Once you have created the new case alert, it will show up for case workers within the case alert configuration screen on the caseboard.