



**caseTRACK**

User Manual

April 2012

# The Children's Home Society of West Virginia

caseTRACK

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\* Items  
required to  
initially build  
caseTRACK  
case record.

# The Children's Home Society of West Virginia

## caseTRACK

### I. caseTRACK Information

#### caseTRACK Overview

This Web-based client information system tracks client progress, determines patterns of care, and facilitates best practices. Our plan for the future is for caseTRACK to evaluate costs and communicate with network providers, SACWIS and accounting systems to reduce dual entry.

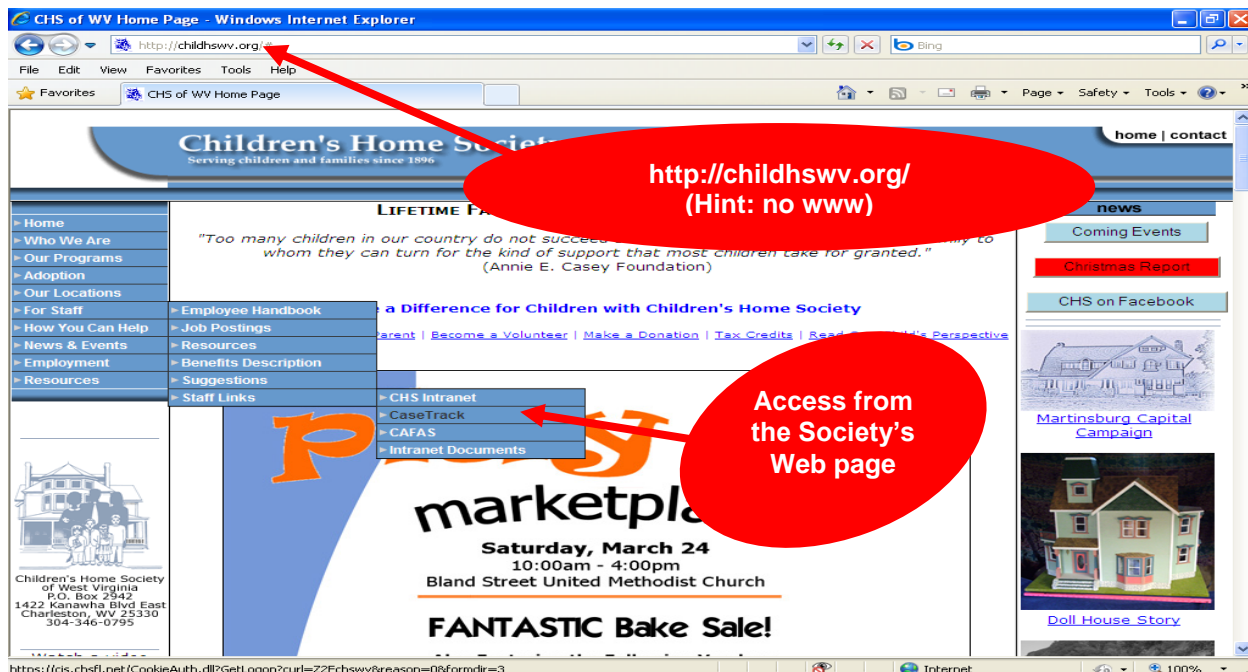
caseTRACK contains general information about your clients to help with reporting to COA and other organizations like United Way and HMOs. Client demographics, including names, race, ethnicity, family income levels, addresses, phone numbers, identification numbers and alternate names, just to name a few, can be captured using the system. Google™ Maps to your clients' locations are readily accessible by clicking the "Map It" link included in the system.

#### caseTRACK Features

**Client Demographics:** the Client Demographic form contains demographic information and billing information such as authorization numbers, effective and expiration dates for authorizations, primary diagnosis, provider ID and staff ID. This form may be printed by clicking on the View Demographic Form. You will then sign and date the form and file it in the case record.

**Facesheet:** contains demographic information, admissions, programs, addresses, phone numbers, locations, diagnosis, funding sources, workers, tasks recorded, tasks due, services, collateral contacts and school. To print the facesheet click on View Facesheet. You may also export this report.

caseTRACK can be accessed from any computer by opening your internet browser and going to the Society's web page. Go to 'For Staff,' 'Staff Links,' 'CaseTrack.'

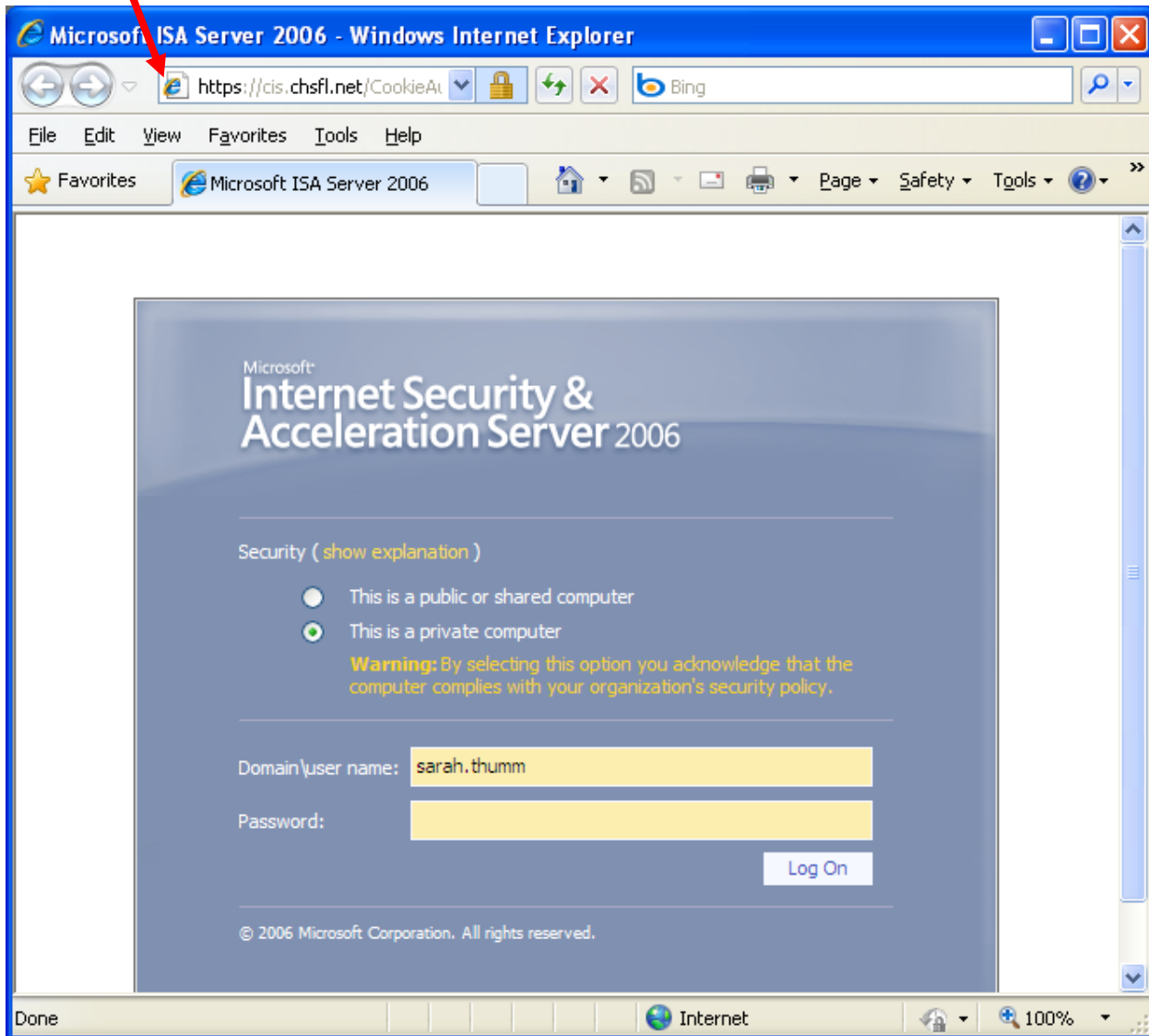


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## The Children's Home Society of West Virginia

### caseTRACK

To create a **caseTRACK** Shortcut on your Desktop, after opening the **caseTRACK** login page, left click on the 'E' then drag and drop the URL on your desk top.



On your desktop the name of the URL will be Microsoft ISA Server 2006. You can leave that as the name if you like or you could rename it **caseTRACK**.

If you experience any errors logging into **caseTRACK**, please email Help Desk participants (Jeff Blankenship [jblankenship@childhswv.org](mailto:jblankenship@childhswv.org), George James [gjames@childhswv.org](mailto:gjames@childhswv.org), and Cliff Terrell [cterrell@childhswv.org](mailto:cterrell@childhswv.org)).

Please include details of what was trying to be done at the time of the error and copy & paste the error message received into the email. You may also call 304-346-0795.

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### II. Login

The Society's caseTRACK MIS uses your CHS username (first name.last name) and password to log into the system. Always click the radio button labeled **"This is a private computer."**

Microsoft ISA Server 2006 - Windows Internet Explorer

https://cis.chsfl.net/cookieAuth.dll?GetLogon?curl=Z2FchswvZ2Fhome.z

File Edit View Favorites Tools Help

caseTRACK Tutorials, Tips a... Suggested Sites Get more Add-ons Bluefield Daily Telegraph

Microsoft ISA Server 2006

Microsoft Internet Security & Acceleration Server 2006

Security ( show explanation )

☐ This is a public or shared computer

☒ This is a private computer

Warning: By selecting this option you acknowledge that the computer complies with your organization's security policy.

Domain\user name: sarah.thumm

Password: .....

Log On

© 2006 Microsoft Corporation. All rights reserved.

Always Select – 'This is a private computer'

Log off by closing the browser screen and click the 'X' in the corner.

**NOTE:** To use the system you must have a valid account. If not, you will not have access to the system.

### Logging Out

When finished using caseTRACK, log out by closing the browser screen by clicking the X mark on the corner of the screen.

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## III. Welcome

When you have successfully accessed the system, you will see the "My Clients" view. Your "My Clients" view lists all of the clients currently assigned to you and or the clients assigned to your employees. Your "Recent Clients" are clients that have been assigned you or your employees within the last 30 days.

Click Home to Return to Your Clients List

caseTRACK

Help Desk  
Contact **Marian Thomas**  
(321) 397-0000 x2060

Home My Division's Home My Location's Home Executive Dashboard Service Signoff Tasks Due Providers Reports My Info Transfer Clients Help Non-Client Services

My clients : - Select - Search by Last Name : AND DOB : OR Search By SSN or Medicaid # :  
Go Search Search

My Clients My Recent Clients My Clients (Basic) My Clients (Diagnosis)

SSN	Client Name	DOB	Race	Ethnicity	Primary Fundor
[REDACTED]	STEVEN B 201 3RD AVENUE CHARLESTON, WV 25303 Phone: 740-617-0790	8/31/1985	White	None of the Above	
[REDACTED]	BOB L 1171 EMERALD RD #1 CHARLESTON, WV 25314-4201 Phone: 304-610-6782	5/21/1980	White	None of the Above	
[REDACTED]	MARIA S 4961 HIGHWAY LAVAN Ph			None of the Above	Medicaid
[REDACTED]					
[REDACTED]					
[REDACTED]	1306 OAK CHARLESTON, WV Phone: 304-541-5470			None of the Above	

Unbilled and Unpaid Services

'Medicaid' services performed after 2/1/09 require approval in order to be billed. Go to the 'Service Signoff' menu option to review your notes.

Worker	Status	Notes
FOLEY, SCOTT	Pending	8
MATHERLY, ALYCE	Pending	341
MATHERLY, ALYCE	Sent to Supervisor	7
MCKINNEY, ERIN E.	Pending	335
MCHULLEN, LAURIE	Pending	92
MORELAND, CAITLIN	Pending	25
MORELAND, CAITLIN	Sent to Supervisor	2
SEMENTE, BRIAN	Pending	2

\* Missing Items below can cause billing rejections.

\* No Primary Address

Name

If you are missing existing clients, please search the database first (see next page) then add each client by clicking Add Client under the Search Results.

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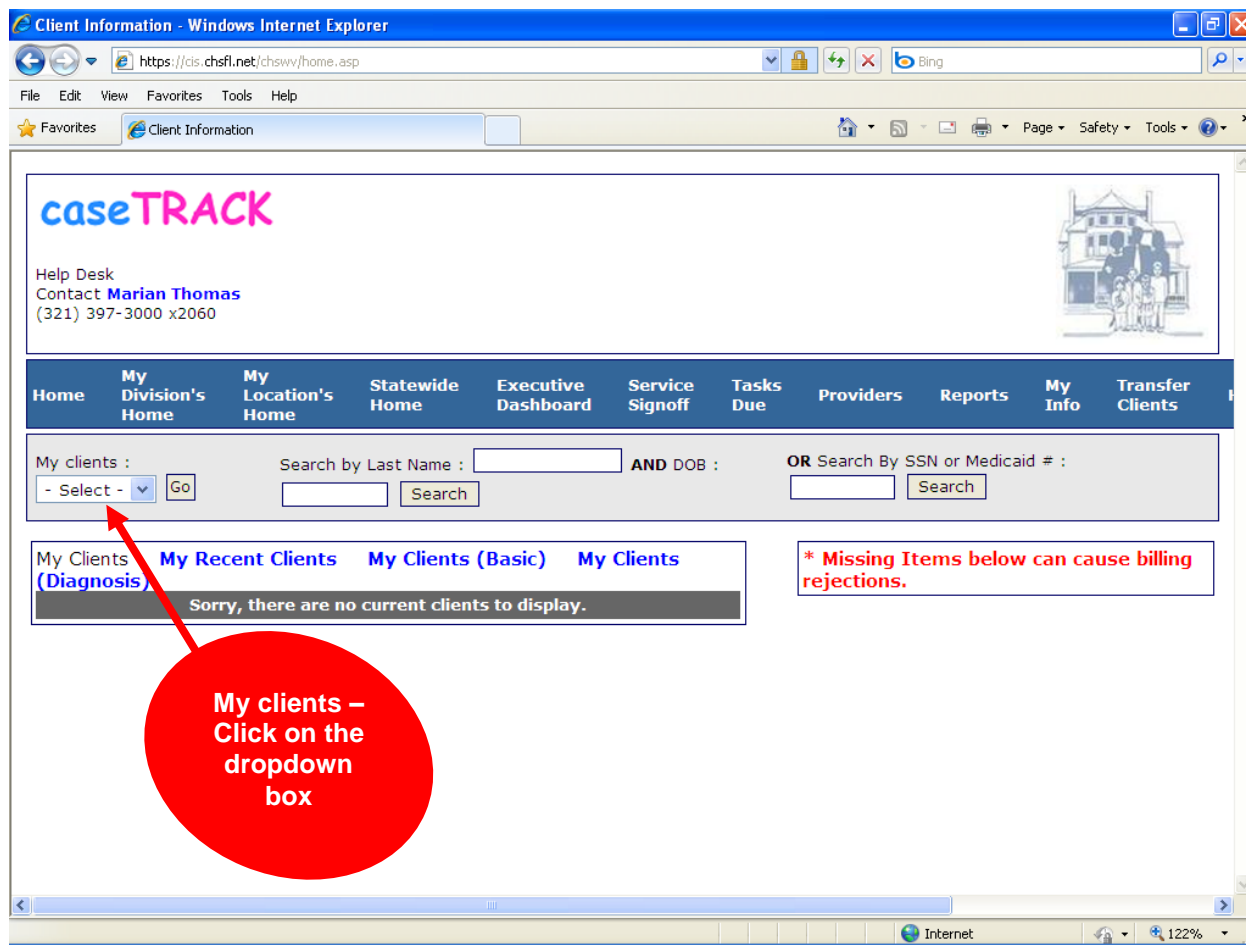
# The Children's Home Society of West Virginia

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## A. Client Search

To search for clients, you must enter at least the first three (3) characters of the client's last name. If the client is assigned to you, you will be able to view the client in the "My clients" view.

The page will execute the search and depending on the user's level of access, will be given the option of Viewing, Editing, or Deleting the client.



OR

You can go to "My clients" and click on the drop down box to select one of your clients.

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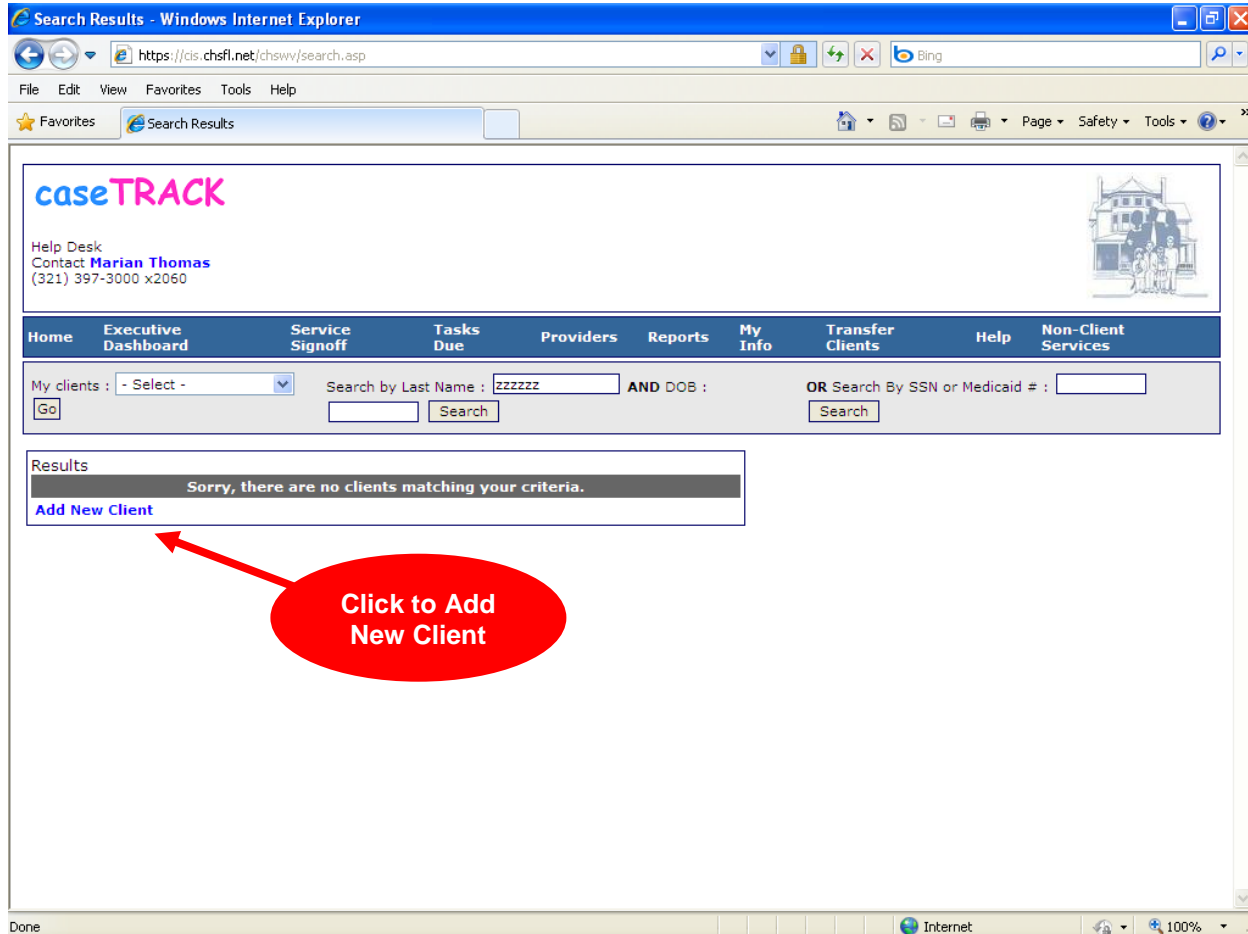
# The Children's Home Society of West Virginia

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## B. Add New Client

Prior to adding a new client, ensure you completed a proper search as identified in the section Client Search. Once you have confirmed that a file does not currently exist for a client, please proceed with the following steps.

If the client does not exist in caseTRACK, click 'Add New Client' in order to add the client. If you do not have an 'Add New Client' button then type 'zzz' in the 'Search by Last Name' text box, then click the 'Search' button. The 'Add New Client' button will appear.



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Fields marked with an asterisk (\*) are required fields. Save the record by clicking the 'Save' button. If required fields are left blank or there is a problem with the data entered, you will be asked to go back and complete the field.

This screenshot shows the 'Add Client' form in a web browser. The form is titled 'Add Client' and contains the following fields:

- \* Admission Date: 3/22/2012
- \* Select Referral Source: - Select -
- Additional Referral Info: [Text Field]
- \* Select Location: - Select -
- \* Select Program: - Select -
- Select Worker: - Select -
- \* SSN / Pseudo SSN: [Text Field]
- \* First Name: [Text Field]
- Middle Name: [Text Field]
- \* Last Name: [Text Field]
- Maiden Name (if applicable): [Text Field]
- \* Date of Birth: [Text Field]
- \* Gender: - Select -
- \* Race: - Select -
- \* Ethnicity: - Select -
- \* Religion: - Select -
- \* Primary Language: - Select -

This screenshot shows the bottom section of the 'Add Client' form in a web browser. The form is titled 'Add Client' and contains the following fields:

- \* Family Size: - Select -
- \* Family Income (Annual): [Text Field]
- \* Primary Address Type: - Select -
- \* Address: [Text Field]
- Address (cont): [Text Field]
- \* City: [Text Field]
- \* State: - Select -
- \* Zip: [Text Field]
- Primary Phone Type: - Select -
- Phone Number: [Text Field]
- Birth City: [Text Field]
- Birth County: - Select -
- Birth State: - Select -
- Birth Country: United States
- Email Address: [Text Field]
- Citizenship: - Select -
- FSFN ID: [Text Field]
- Save

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## Creating a Pseudo-SSN

If it is not possible to obtain the person's actual SSN, you should use a 9 digit pseudo-SSN in the format FMLMMDDYY where:

**F:** First letter of the First Name

**M:** First letter of the Middle Name. If the client does not have a middle name, use the letter "X" as the second digit.

**L:** First letter of the Last Name

**MM:** Enter month of Birth (use leading zeros for Months, e.g., 01 through 09)

**DD:** Enter day of Birth (use leading zeros for days, e.g., 01 through 09)

**YY:** Enter year of birth (use leading zeros where necessary, e.g., 01 through 09)

For example, if your client's name is Elmer T. Fudd and was born on 1/1/2005, Elmer's pseudo-SSN will be ETF010105.



In cases where your client's exact birthday cannot be obtained, determine the person's approximate age (ask, "How old are you?" or give your best guess), then code the birthday as January 1 of the appropriate year.

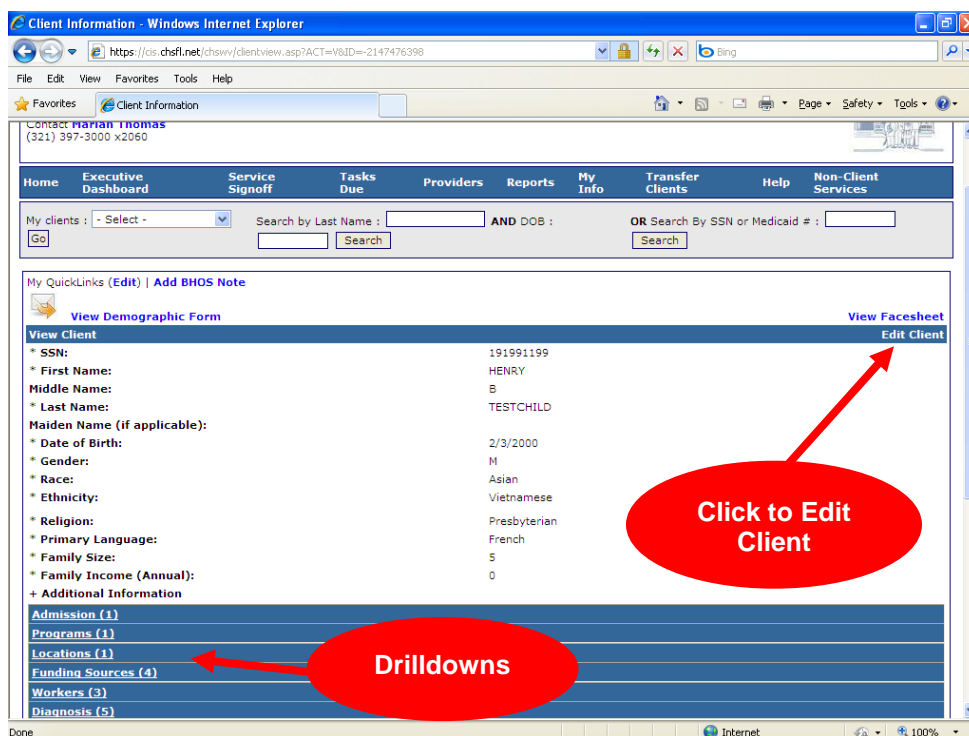
If 2 individual's pseudo-SSNs are identical, you can use X, Y or Z in the middle initial position. For example if Elmer has a twin brother Ernest T. Fudd, you could use a pseudo-SSN of EXF010105.

Note: The pseudo-SSN should always be used for that client until the true or correct social security number is known.

## C. View Client

To view a client, search for the client, then click on the client's name. After selecting a client to view, you will see several drilldown links at the bottom of the screen. These drilldown options are provided for you to view more detailed information related to the client.

By clicking on each section heading, you can open one or all of these detailed sections. The detailed records can be edited or deleted by clicking the Edit  or Delete  buttons, respectively.



Client Information - Windows Internet Explorer

https://cis.chsf.net/chsww/clientview.asp?ACT=V&ID=2147476398

File Edit View Favorites Tools Help

My clients: - Select - Search by Last Name: AND DOB: OR Search By SSN or Medicaid #: Search

My QuickLinks (Edit) | Add BHOS Note

View Demographic Form View Facesheet Edit Client

\* SSN: 191991199

\* First Name: HENRY

Middle Name: B

\* Last Name: TESTCHILD

Maiden Name (if applicable):

\* Date of Birth: 2/3/2000

\* Gender: M

\* Race: Asian

\* Ethnicity: Vietnamese

\* Religion: Presbyterian

\* Primary Language: French

\* Family Size: 5

\* Family Income (Annual): 0

+ Additional Information

Admission (1)

Programs (1)

Locations (1)

Funding Sources (4)

Workers (3)

Diagnosis (5)

Click to Edit Client

Drilldowns

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## D. Edit New Client

To edit a client, click Edit Client on the right corner of the View Client screen (see above). Update the fields and save the record by clicking the 'Save' button.

## Drilldowns

The following **twenty five (25) sections** give specific instructions on populating information in the drilldown sections of the caseTRACK system.

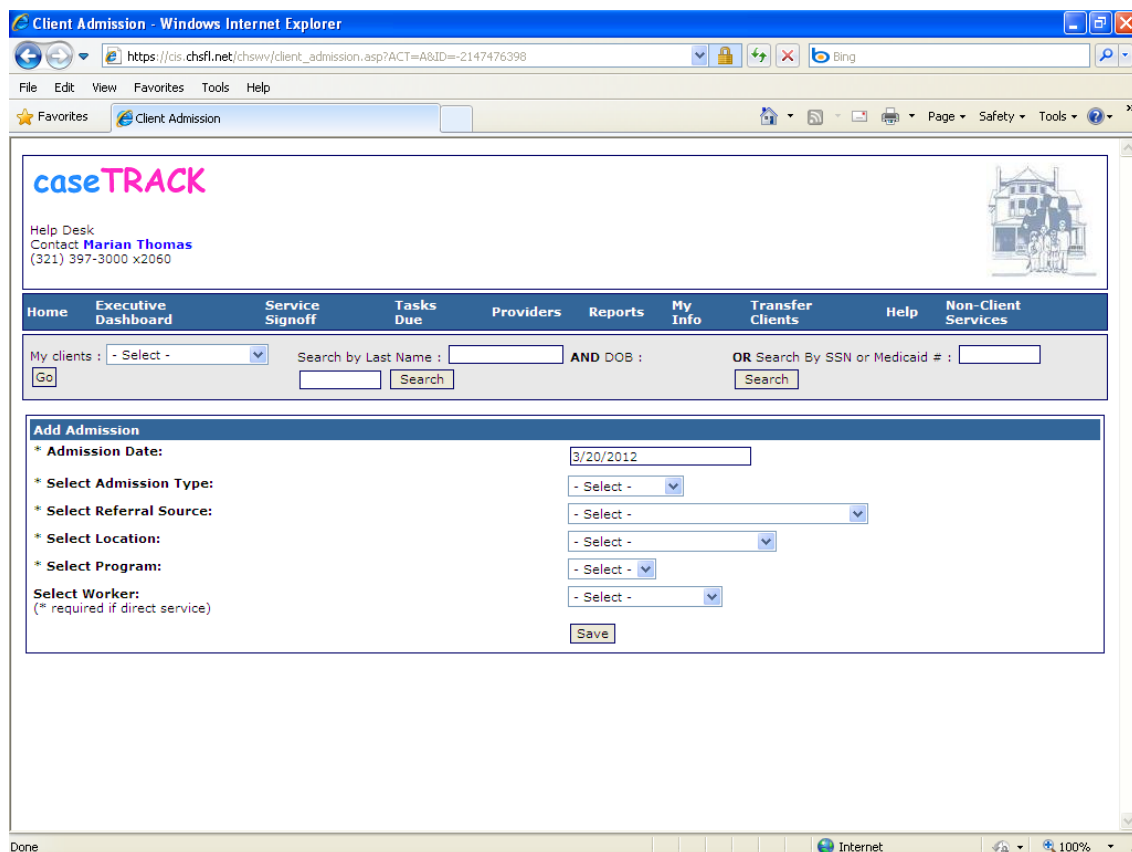
First please complete the following sections to build the case initially: 1, 2, 3, 5, (4 & 6 for shelter youth & foster care children) 9, 10, 15 & 25.

These section are marked in this manual with a , You will then fill in all the additional sections as indicated by this manual to complete the case.

## 1. Admission Detail

The Admission section of the system is used to document the date that the client was admitted to the Society. **You must first complete the admission detail before assigning the client to a program, location or worker.** A client can only have **one active admission** to the agency.


To add a new admission, click the Admission section header to open the section. **Fields marked with an asterisk (\*) are required fields.** Save the record by clicking the 'Save' button. If required fields are left blank or there is a problem with the data entered, you will be asked to go back and complete the field.

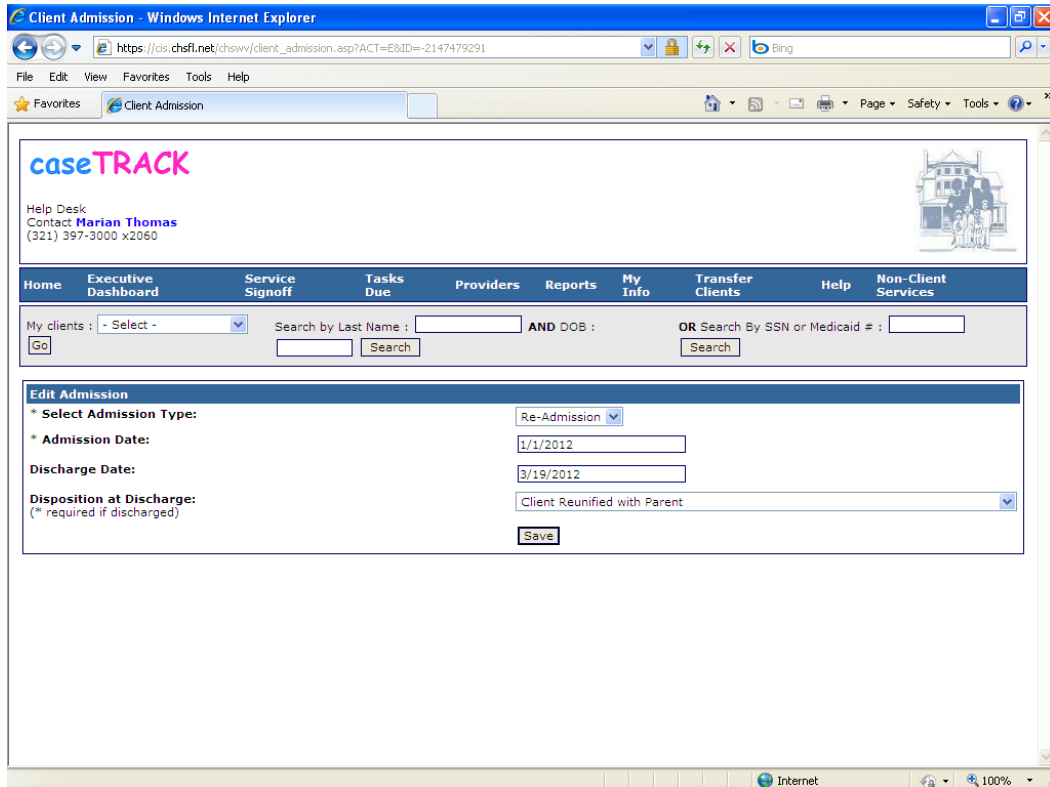


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When the client is discharged from the agency, click the Admission section header to open the section and click Edit . Complete the discharge date field and the disposition at discharge field and click the Save button.



## 2. Program Detail

The Program section of the system is used to document the program(s) from which the clients are receiving services. A client can have **more than one active program** within the caseTRACK.

After a client has already been admitted to the Society and one (1) program, to add a second program you will click the Program section header to open the section and click 'Add Program Admission'. You will then complete the date, referral source, location, and worker. There is also a section to write Notes if you need to clarify some issue. Save the record by clicking on the Save button. If required fields are left blank or there is a problem with the data entered, you will be asked to go back and complete the field.

When the client is in multiple programs and you want to close a program you will need to select the Program section header to open the section, choose the program you want to close and click 'Edit ' then add the end date and the appropriate disposition at discharge code from the dropdown box. This will close the program as well as the specific program location. But it will not close the worker. You will need to close the worker in a separate action in the Worker Assignments section.

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Client Program - Windows Internet Explorer

https://cs.chsf.net/chswv/client\_programs.asp?ACT=A&ID=-2147476398

caseTRACK

Help Desk  
Contact: **Marian Thomas**  
(321) 397-3000 x2060

Home Executive Dashboard Service Signoff Tasks Due Providers Reports My Info Transfer Clients Help Non-Client Services

My clients : - Select - Search by Last Name : AND DOB : OR Search By SSN or Medicaid # :  
Go Search Search

**Add Program**

\* Program Admission Date: 3/20/2012

\* Select Referral Source: - Select -

\* Select Location: - Select -

Notes (e.g. specific house, bedroom, etc.):

\* Select Program: - Select -

Select Worker: - Select -

(\* required if direct service)

Save

To Add a Program complete the screen.



## Foster Care & Adoption Services

**Children:** when a foster child is placed with the Society the child will be open for the “Foster Care – Children” program in caseTRACK. The legal standing for the children (DHHR or CHS voluntary placement, state temporary custody, state legal guardianship, etc.) does not matter when entering the foster child in the “Foster Care – Children” program in caseTRACK. Entering the child in this program will allow the child to appear in foster care reports generated by caseTRACK. When the foster child’s placement is terminated, you will close the “Foster Care – Children” program using the last date of placement and the appropriate ‘Disposition at Discharge’ code from the dropdown listing.

When the foster child is placed in respite you will enter the child in the ‘Foster Care – Respite’ program for that period the child is in respite, then discharge the child from the Respite program using ‘Client Returned to Previous Placement’ as the ‘Disposition at Discharge’ code. The ‘Foster Care – Children’ program will remain open while the child is in respite.

Adoption staff will enter all children receiving adoption services in caseTRACK. These adoption service programs are:

- Adoption – WVDHHR: these are the children in WVDHHR custody who are being adopted by our foster parents.
- Adoption – Intercountry: children placed from other countries and adopted by our families.
- Adoption – CHS Domestic: children who we received from their birth parents and are in or are going to be in the guardianship of the Society
- Adoption – Other Domestic: children from a variety of sources not already covered in this listing. These children could be from other state government agencies, other providers, etc.
- Adoption – Post Finalization Services: those services provided to adoptive families to maintain the family to reduce adoption dissolutions.

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**NOTE:** See AKAs regarding name changes.

When there is a 'foster to adopt' placement, the WVDHHR child will be open for both the 'Foster Care – Children' and 'Adoption – WVDHHR' programs in **caseTRACK**. This will allow the child to appear in both foster care and adoption reports generated by **caseTRACK**. The "Adoption – WVDHHR" program will be entered when the foster family agrees to adopt the child and signs the **WVDHHR Agreement to Adopt**. Please be reminded that the Society is being paid for foster care services during the adoption placement period. Staff must maintain the foster care standards regarding visits, documentation, and other contract issues for foster care services until the adoption finalization.

When the "foster to adopt" child's adoption is finalized both programs will be closed using the adoption finalization date. You will use the **Adoptions: Finalized** 'Disposition at Discharge' code from the dropdown listing for both programs.

Generally when a child is admitted to the agency for one of the other adoption services there may not be a foster care placement. This will result in the child only being opened in the appropriate adoption service program. However, occasionally a child may spend a few days in foster care. In this situation you will also open the child in the 'Foster Care – Children' program. To discharge the child from the Foster Care – Children program, select the 'Client Discharged to Adoption' as the 'Disposition at Discharge' code from the dropdown listing and enter the discharge date.

We are adding two (2) additional 'Disposition at Discharge' codes for adoption services: 'Adoptions: Disruption' and 'Adoptions: Dissolution'. This will allow easy tracking and reporting for these discharge types.

**Resource Parents:** when entering a prospective family in **caseTRACK** you will enter the parent applicant as a new admission to the agency. The applicant will be entered in **caseTRACK** after you receive and approve the prospective parent's application to become one of Our Families. The admission date is the date you approve the application. In a two parent household both parents will be entered in **caseTRACK**.

During the admission process you will choose the program 'Our Family – Parent Applicants', location, and worker from the dropdown list and enter the address (foster home address-physical) and complete the demographic information. You will add a mailing address for the family if it is different from the physical address.

When the prospective family has been approved as a resource family (foster & adoptive family) you will add them to the 'Foster Care – Foster Parents' program in **caseTRACK**. You will use the Administrative Approval Date of the home study as the Program Admission Date. Upon completing this entry the 'Our Family – Parent Applicants' program will automatically be closed. You will then add the newly approved family to the 'Adoption – Adoptive Parents' program.

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## 3. Location Detail

The Location section of the system is used to document the location(s) from which the clients are receiving services. To add a new location, click the location section header to open the section. Click 'Add Location'. Fields marked with an asterisk (\*) are required fields. A client can have **more than one active location** at any given time.

Save the record by clicking the 'Save' button. If required fields are left blank or there is a problem with the data entered, you will be asked to go back and complete the field.

The screenshot shows a web browser window titled "Client Information - Windows Internet Explorer". The address bar shows a URL starting with "https://cshf.net/cshw/client\_locations.asp?ACT=A&ID=-2147476398". The browser window contains a search bar at the top with fields for "My clients:", "Search by Last Name:", "AND OR Search By SSN or Medicaid #:", and "DOB:". Below the search bar is a section titled "Add Location". This section contains several required fields marked with an asterisk (\*): "Select Program:", "Select Location:", "Referral Source:", "Begin Date:", "End Date:", "Notes (e.g. specific house, bedroom, etc.):", and "Disposition at Close:". Each field has a dropdown menu or text input box. A "Save" button is located at the bottom of the "Add Location" section. The browser window also shows a status bar at the bottom with "Done" and "Internet" indicators.

**Do not discharge the client from Locations.**



## 4. Funding Source Detail

This section documents the funding source(s) (currently Medicaid, Medicaid Waiver, and Magellan) for which the client is eligible. A client can have **more than one funding source**.

Active and historical client Medicaid numbers, ASO authorization dates, numbers and limits can be recorded in the system. 'Units Remaining' functionality is also included although not currently being used by the Society.

To add a funding source click "Add a Funding Source." You will then select a funding source, start date, end date, identification number (Medicaid Number), ASO authorization number (currently APS), Units Authorized, specific service, and check the box if it is the primary billing service. The Identification number format for Medicaid is an 11-digit number. Please be reminded that at least one funding source has to be the primary. Click the Save button.

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For those children in emergency shelter care the primary funding source is Medicaid, the specific service is H0019-U4, Crisis Support and it is also the primary billing service. Shelters will also use the T1017 Case Management and A0160 HE Transportation Mileage codes.

For those children in foster care who are receiving Medicaid billable services the social worker will select the most appropriate primary billing service from this limited list: T1017 Case Management, H0004 Supportive Counseling – Individual, or possibly H0004-HO Professional Counseling – Individual. There are other billable codes for these children but these appear to be used more often.

You will add a funding source for each Medicaid service you have authorized through the ASO. You will always enter an end date for each of these authorizations based on the authorization data you receive from the Administrative office.

Client Funding Sources - Windows Internet Explorer

https://cis.chsfl.net/chswy/FundingSource.asp?ACT=A&ID=-2147476398

File Edit View Favorites Tools Help

My clients : - Select - Go Search by Last Name : AND OR Search By SSN or Medicaid # : DOB : Search Search

**Add Funding Source**

\* **Funding Source:** - Select -

\* **Start Date:** [Calendar Icon]

**End Date:** [Calendar Icon]

**Identification Number:**  
(i.e. Medicaid # or HMO Member #)

**Authorization Number:**

\* **Units Authorized:**

**Specific Service:** - Select -

**Primary?:** ☐

Save

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The funding sources entered in this section will be the only funding sources available in the dropdown box under the Progress Note section. Please be aware that you will not be able to save your progress notes without a pre-selected funding source. For some programs such as 'Foster Care - Foster Parents' and 'Adoption - Adoptive Parents' the funding source and diagnosis are not required.

To close a funding source, click the Funding Sources section header to open the section then click Edit . Enter the end date and click 'Save'.

Client Funding Sources - Windows Internet Explorer

https://cis.chsfl.net/chswv/FundingSource.asp?ACT=A&ID=-2147476396

File Edit View Favorites Tools Help

My clients : - Select - Go Search by Last Name : AND OR Search By SSN or Medicaid # : DOB : Search

**Add Funding Source**

\* Funding Source: Medicaid

\* Start Date: 1/1/2012

End Date: 2/15/2012

Identification Number: (i.e. Medicaid # or HMO Member #) 0391111111

Authorization Number: 98765

\* Units Authorized: 45

Specific Service: H0019-U4 Crisis Support

Primary?: ☒

Save

The client id format for Medicaid is an 11-digit number.

Internet 150%

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## 5. Worker Assignment Detail

Current and historical caseloads can be managed using caseTRACK. In addition, workers who share clients across programs and locations can share important information regarding their clients and collaborate when appropriate to ensure the delivery of effective services.

To add a worker, click the Worker section header to open the section. Click 'Add Worker'. Select the worker from the drop down box, enter the Begin Date, the Assignment Type (Primary, Secondary, Courtesy or Temporary) and click 'Save'. To close a worker assignment, enter the End Date and End Reason then click 'Save'.

The screenshot shows a web browser window titled 'Assign a Worker - Windows Internet Explorer'. The address bar shows a URL from 'https://cis.chsf.net'. The page has a search section at the top with 'My clients:' and options to search by last name, SSN, or Medicaid #. Below this is the 'Add Worker Assignment' section. It contains a dropdown for selecting a worker, with a note that workers are limited to the division(s) the client is currently admitted to. There are also input fields for 'Begin Date', 'End Date', a dropdown for 'End Reason', and a dropdown for 'Assignment Type'. A 'Save' button is at the bottom right of the form.




Workers are limited to the Locations where the client is currently admitted.



## 6. Diagnosis

The Diagnosis section documents the diagnoses that have been given to the client by a credentialed clinician. All five (5) Axes can be documented chronologically for your clients. To add a diagnosis click on "Add Diagnosis" then select the diagnosis from the dropdown box, choose the Axis, Start Date, End Date (if appropriate), add Notes if indicated, and check the box if it is the Primary diagnosis. Click on 'Save.'

For Medicaid purposes you will complete all five (5) Axes in caseTRACK.

To end a diagnosis, click on the diagnosis section, click on Edit  and enter the end date and click on 'Save.'

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Client Diagnosis - Windows Internet Explorer

https://cis.chsfl.net/chswv/diagnosis.asp?ACT=A&ID=-2147476398

File Edit View Favorites Tools Help

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Help Desk  
Contact **Marian Thomas**  
(321) 397-3000 x2060

Home Executive Dashboard Service Signoff Tasks Due Providers Reports My Info Transfer Clients Help Non-Client Services

My clients : - Select - Search by Last Name : AND DOB : OR Search By SSN or Medicaid # :  
Go Search Search

**Add Diagnosis**

\* Diagnosis: - Select -  
\* Axis: - Select -  
Start Date:   
End Date:   
Notes:   
Primary?:   
Save

### Axis I Clinical Disorders, Other Conditions That May Be a Focus of Clinical Attention

This Axis is for reporting all the various disorders or conditions in the Classification except for the Personality Disorders and Mental Retardation. Also reported is Other Conditions That May Be a Focus of Clinical Attention. If more than one (1) Axis I disorder is present the principal diagnosis should be listed first. Use the 'Diagnosis' dropdown box to select the appropriate diagnosis.

### Axis II Personality Disorders, Mental Retardation

Axis II is for reporting Personality Disorders and Mental Retardation. The listing of these on a separate axis ensures that consideration will be given to the possible presence of Personality Disorders and Mental Retardation that might otherwise be overlooked when attention is directed to the usually more florid Axis I disorders. Use the 'Diagnosis' dropdown box to select the appropriate diagnosis.

 For Axes III, IV, and V you will choose the appropriate Axis, Start Date, End Date (if appropriate), add Notes to indicate the appropriate diagnostic information.

**Axis III General Medical Conditions:** If there is a medical condition impacting treatment then write it in the Notes section. Pages 29 – 30 of the DSM - IV TR should be consulted for clinical use. Write "No diagnosis on Axis III" if there is not a medical condition related to the treatment indicated from Axis I. Click on Save.

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# The Children's Home Society of West Virginia



## Axis IV Psychosocial and Environmental Problems

**NOTE:** Although it is based on the clinical scale presented in the DSM - IV TR, this summary lacks the detail and specificity of the original document. The complete Psychosocial and Environmental Problems categories and descriptions on pages 31 – 32 of the DSM - IV TR should be consulted for clinical use.

Problems with primary support group.  
Problems relate to the social environment.  
Education problems.  
Occupational problems.  
Housing problems.  
Economic problems.  
Problems with access to health care services.  
Problems related to interaction with the legal system-crime.  
Other psychological and environment problems.

## Axis V Global Assessment of Functioning (GAF) Scale

**NOTE:** Although it is based on the clinical scale presented in the DSM - IV TR, this summary lacks the detail and specificity of the original document. The complete GAF scale on pages 32 – 34 of the DSM - IV TR should be consulted for clinical use.

### GAF Scale

Code	Description of Functioning
91 - 100	Person has <b>no problems</b> OR has superior functioning in several areas OR is admired and sought after by others due to positive qualities
81 - 90	Person has <b>few or no symptoms</b> . Good functioning in several areas. No more than "everyday" problems or concerns.
71 - 80	Person has symptoms/problems, but they are <b>temporary, expectable reactions to stressors</b> . There is no more than slight impairment in any area of psychological functioning.
61 - 70	<b>Mild symptoms in one area</b> OR difficulty in one of the following: social, occupational, or school functioning. BUT, the person is generally functioning pretty well and has some meaningful interpersonal relationships.
51 - 60	<b>Moderate symptoms</b> OR moderate difficulty in one of the following: social, occupational, or school functioning.
41 - 50	<b>Serious symptoms</b> OR serious impairment in one of the following: social, occupational, or school functioning.
31 - 40	<b>Some impairment in reality testing</b> OR impairment in speech and communication OR serious impairment in several of the following: occupational or school functioning, interpersonal relationships, judgment, thinking, or mood.
21 - 30	<b>Presence of hallucinations or delusions which influence behavior</b> OR serious impairment in ability to communicate with others OR serious impairment in judgment OR inability to function in almost all areas.
11 - 20	There is <b>some danger of harm to self or others</b> OR occasional failure to maintain personal hygiene OR the person is virtually unable to communicate with others due to being incoherent or mute.
1 - 10	<b>Persistent danger of harming self or others</b> OR persistent inability to maintain personal hygiene OR person has made a serious attempt at suicide.









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## 7. Scores and Assessments

The Scores and Assessments feature can be used to track your client's current and historical CAFAS and Casey Life Skills scores. To add a score you will click on the Scores and Assessments section header, click on 'Add Score' and complete the screen. You will select the type (CAFAS or Casey), add the date, score and write notes. Click on Save.

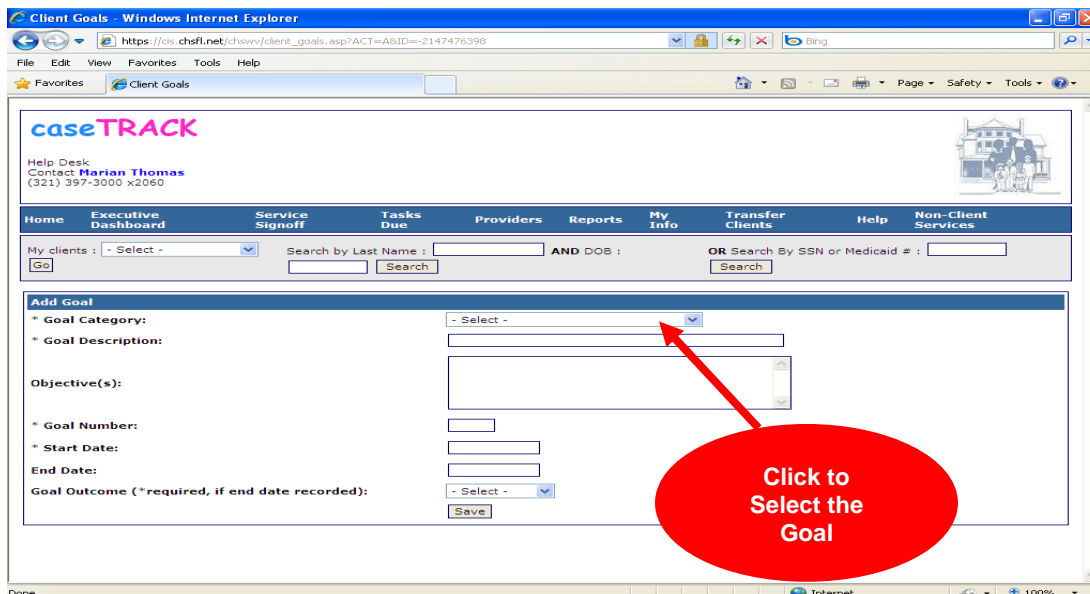
Scores and Assessments (4)				
Type	Date	Score	Notes	
Ansell-Casey Life Skills Assessments (ACLSA)	4/26/2011	60		 
Ansell-Casey Life Skills Assessments (ACLSA)	1/26/2011	55		 
CAFAS	4/21/2010	150		 
Parental Stress Index	10/26/2010	45		 
<a href="#">Add Score</a>				

## 8. Goals

This function allows you to log specific goals related to your clients. Additionally, you can record the progress of the established goals on a daily or a weekly basis or other frequency of choice. To add a goal, click on the Goal section header to open the section.

Goals (2)						
Number	Type	Description	Start Date	End Date	Rating	
1	Resiliency Coping Skills	jdeiowjjwowkwepokdwpk	3/1/2012			<a href="#">Add Rating</a> 
<a href="#">Add Goal</a> 						

Click on the blue hyperlink, Add Goal. Select the Goal Category from the drop down box.



Client Goals - Windows Internet Explorer

https://cis.chsfi.net/chsfi/client\_goals.asp?ACT=A&ID=-2147476398

File Edit View Favorites Tools Help

caseTRACK

Help Desk:  
Contact **Marian Thomas**  
(321) 397-3000 x2060

Home Executive Dashboard Service Signoff Tasks Due Providers Reports My Info Transfer Clients Help Non-Client Services

My clients :  Search by Last Name :  AND DOB :  OR Search By SSN or Medicaid # :

**Add Goal**

\* Goal Category:

\* Goal Description:

Objective(s):

\* Goal Number:

\* Start Date:

End Date:

Goal Outcome (\*required, if end date recorded):

Click to Select the Goal

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## The Children's Home Society of West Virginia

caseTRACK

All fields marked with an asterisk \* are required fields.

To complete the goal enter a goal description and goal number in the appropriate text fields. Enter a start and end date if that information is available. Click the Save Button.

To update the status of a goal click or add a Rating.

Goals (1)						
Number	Type	Description	Start Date	End Date	Rating	
1	Education	test	10/1/2011		<a href="#">Add Rating</a>	 
<a href="#">Add Goal</a>						

Update the goal status and click on save. You can click on Save and Go to Weekly Summary to update the client's summary.

### Goal Status Updates

Goal Status Date:  

Goal Number	Goal Type	Goal Description	Goal Start Date	Goal Status			
1	Education	test	10/1/2011	<input type="radio"/> Regression	<input type="radio"/> No Progress	<input checked="" type="radio"/> Minimal	<input type="radio"/>
				<input type="radio"/> Intermittent	<input type="radio"/> Significant		

**NOTE:** The Goal Status Update Summary Report is currently not functional.

Click to Save –  
Reports are NOT  
functional at this  
time.

On the Progress Note there is a text field that allows you to enter a goal. You may use this field to relate your notes to the goals listed for the child. However if this not is a Medicaid billable note then do not use the field as it may present audit issues when Medicaid case records are reviewed by the ASO.


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# The Children's Home Society of West Virginia

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## 9. Address

The Address section documents the address(es) of the client. To add an address, click on the Address section and click on 'Add Address', enter street name, enter city, state and zip code, check box if address is primary and click 'Save'. To edit an address, click on the edit icon  and click 'Save'.

To add additional addresses for the client click on 'Add Address.' You will have a variety of address types to choose from in the dropdown box. Complete the address information and click on Save.

Google™ Maps to your clients' locations are readily accessible. To view the map of the address, click on the Map link. You also have the 'Validate' link to confirm the address.

Address (1)						
Address Type	Street Address	City / State / Zip	Primary?	Map	Validate	
Home Address/Physical	301 Park Street	MORGANTOWN, WV 26501	Y	<a href="#">View</a>	<a href="#">Validate</a>	
<a href="#">Add Address</a>						

View & Validate


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# The Children's Home Society of West Virginia

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## 10. Phone Numbers

To add a Phone Number, click the Phone Numbers section header to open the section. Click 'Add Phone', select the phone type, enter phone number and check the box if it is the primary phone for the client then click 'Save'. You will have a variety of phone types to choose from in the dropdown box. To edit a phone number, click on the edit icon  and click 'Save'.

## 11. Progress Note

The Progress Note Section is used to document the services provided to the client (billable and non-billable). To add a progress note, click on the Progress Note section header to open the section. Click 'Add Progress Note'. Enter the service date, select the case worker, program, billable (Yes or No), funding source, service performed, diagnosis, county of service, service setting, and enter the start time and end time.

**NOTE:** Start time (ex: 8:00 am) and end time (ex: 11:15 am). If no am or pm is denoted, then the system defaults to am. You will also see a text box for Goal – Do Not Use this for Medicaid billable services.

You will then enter your note in the text box. Click the 'Save' button to save the note. If you are adding a note older than **three (3) days** you will need to have your supervisor provide you with the password in order to save the note!

When the note does not save there will be error messages to indicate the reason(s). Correct the error(s) and save the document.

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# The Children's Home Society of West Virginia

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The funding source selections are limited to the active funding sources in the client's Funding Source section.

The running tab of Client Services on the right hand column allows you to see all the services performed for the service date to avoid time overlaps.

The screenshot shows the 'Add Progress Note' form for client HENRY TESTCHILD. The form includes fields for Service Date (3/23/2012), Case Worker (THUMM, SARAH R.), Program (Foster Care - Children (01MORGANTOWN)), Is this service billable? (Yes), Funding Source (Medicaid (Primary?: N Auth#: 12345 Service: T1017)), Service Performed (T1017 Case Management), Diagnosis (296.89 Bipolar II Disorder), County of Service (PRESTON), Service Setting (06-Foster Home), Start Time (1:00 pm), End Time (2:15 pm), Goal, Notes, Characters remaining (7500), Password, and buttons for Check Spelling and Save.

On the right, the 'Running Tab' for Client Services for 3/20/2012 is displayed, showing a table with columns for Start Time, End Time, and Service. Below it, the Worker Services for 3/20/2012 are also listed in a similar table format.

For some programs such as 'Foster Care - Foster Parents' and 'Adoption - Adoptive Parents' the funding source and diagnosis are not required.

To print progress notes: write your note and Click Save then a new screen will appear.

The note was successfully saved.

[Click here](#) to view/print the note.

Or

[Click here to add another note](#) for this client.

Or

[Click here to continue working with](#) this client.

To print the note, choose 'Click here to view/print the note.' A new screen with your note will appear. Choose your printer and complete the print process. You will then sign and date the progress note; add your credentials. File the note in the paper case record.

**NOTE:** Progress notes for Medicaid billable services must have a diagnosis and funding source entered in the system prior to starting your progress notes.

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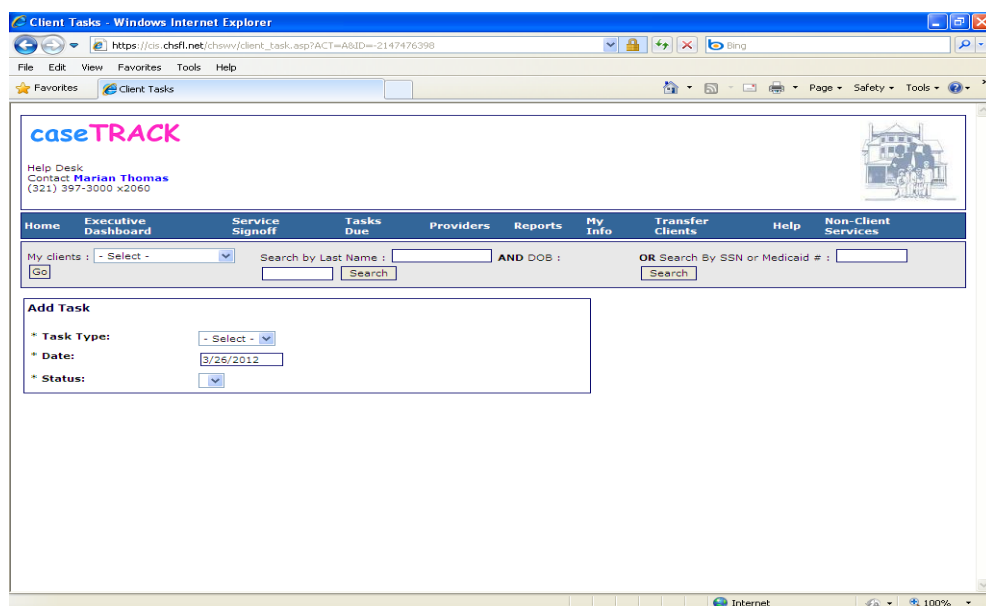
# The Children's Home Society of West Virginia

caseTRACK

## 12. Tasks and Program Requirements

The Society currently does not use this function. Initial steps have been taken for future development. (Due dates for tasks such as Home Studies, Assessments, Plans of Care, etc. required by Medicaid and other agencies can be recorded.)

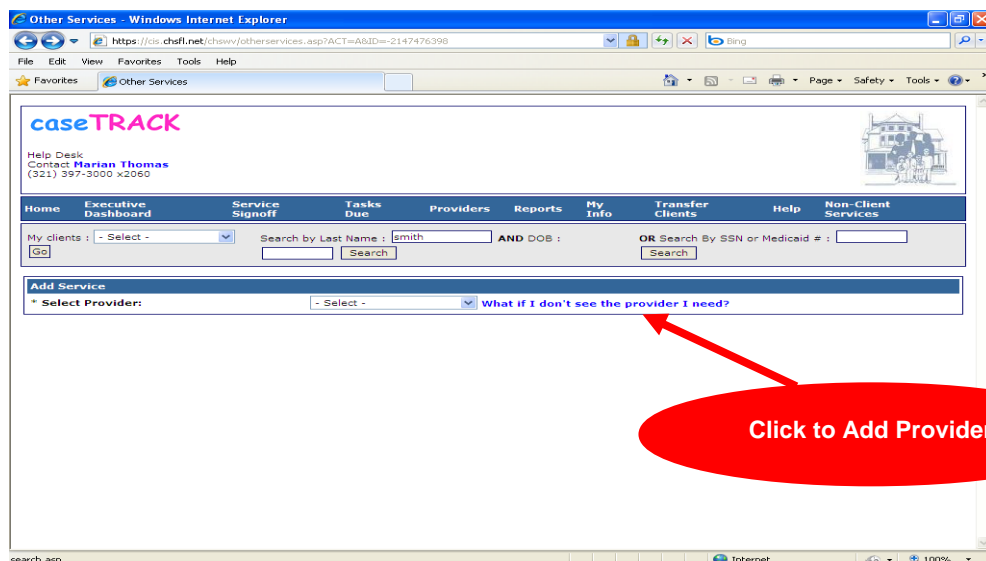
Program requirements are automatically entered based on the program assignment. To add a task, click on the Tasks and Program Requirements section, select 'Add Task', enter the task type, date due and task status. Click the 'Save' button.



## 13. Other Services

The Other Services section documents services that are being provided to the client outside of the Society. To add Other Services, select the provider's name from the dropdown box.

If you do not see the provider you need, click on the "What if I don't see the provider I need link" to add the provider. Select the service type: Dependency Services, Substance Abuse Services, Educational Services, Community Services, Mental Health Services, etc.



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Complete the fields on the form and click 'Save'.

The screenshot shows the 'Add Provider' form in the caseTRACK application. The browser window title is 'Provider Information - Windows Internet Explorer'. The address bar shows 'https://chsfl.net/chswv/prov.asp?ACT=A'. The page has a blue header with the caseTRACK logo and a navigation menu with links: Home, Executive Dashboard, Service Signoff, Tasks Due, Providers, Reports, My Info, Transfer Clients, Help, and Non-Client Services. Below the menu is a search bar with a dropdown for 'My clients', a 'Search by Last Name' field, an 'AND DOB' field, and an 'OR Search By SSN or Medicaid #' field. The 'Add Provider' form itself has a blue header and contains the following fields: Tax ID, Parent Organization, Agency Name, Agency AKA, Web Address, Hours of Operation, Contact First Name, Contact Middle Name, Contact Last Name, Email Address, and Phone Number.

This screenshot shows the bottom section of the 'Add Provider' form. The fields include: Middle Name, Contact Last Name, Email Address, Phone Number, Mobile Number, Fax Number, Other Phone Number, Physical Address, Address, Address (cont), City, State (dropdown), Zip, Mailing Address, Address, Address (cont), City, State (dropdown), Zip, and Keywords. A 'Save' button is located at the bottom of the form.

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## caseTRACK

If you do not see the service category you need, click on the “What if I don’t see the service I need?” link to add the service category to the provider.

Other Services - Windows Internet Explorer

https://cis.chsfl.net/chswv/otherServices.asp?ACT=A&ID=-2147476398

File Edit View Favorites Tools Help

caseTRACK

Help Desk  
Contact **Marian Thomas**  
(321) 397-3000 x2060

Home Executive Dashboard Service Signoff Tasks Due Providers Reports My Info Transfer Clients Help Non-Client Services

My clients : - Select - Search by Last Name : AND DOB : OR Search By SSN or Medicaid # :  
Go Search Search

**Add Service**

\* Select Provider: Tracy Smith What if I don't see the provider I need?

\* Select Service: - Select - What if I don't see the service I need?

Start Date: End Date: Units: Unit Type: Frequency: Funding Source: Authorized Amount: Paid Amount: Save

To close a service, click the Other Services section header to open the section and click Edit . Enter the end date and click 'Save'.

Other Services - Windows Internet Explorer

https://cis.chsfl.net/chswv/otherServices.asp?ACT=E&ID=-2147483646

File Edit View Favorites Tools Help

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Help Desk  
Contact **Marian Thomas**  
(321) 397-3000 x2060

Home Executive Dashboard Service Signoff Tasks Due Providers Reports My Info Transfer Clients Help Non-Client Services

My clients : - Select - Search by Last Name : AND DOB : OR Search By SSN or Medicaid # :  
Go Search Search

**Edit Service**

\* Select Provider: Tracy Smith What if I don't see the provider I need?

\* Select Service: Mental Health Services What if I don't see the service I need?

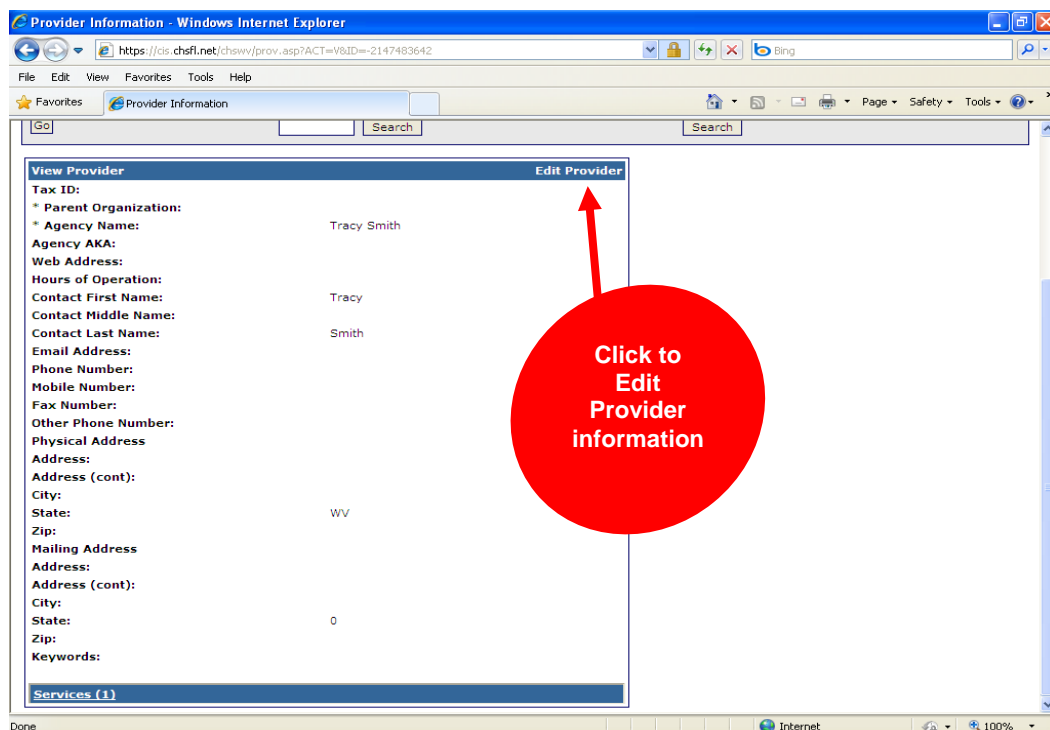
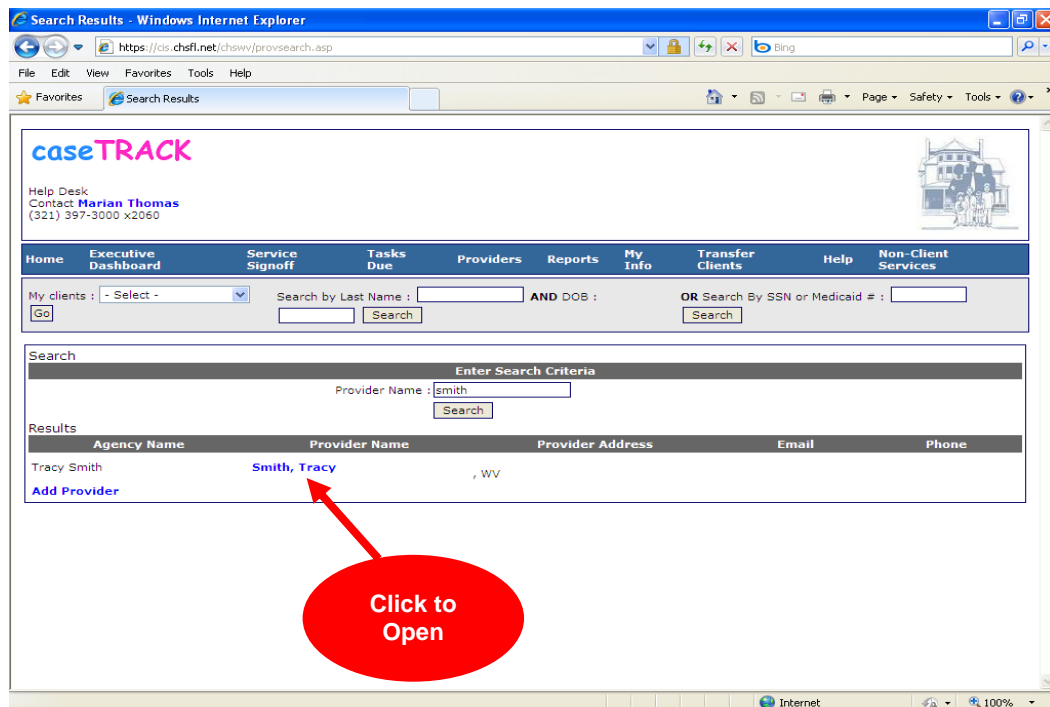
Start Date: 1/1/2012 End Date: 3/20/2012 Units: Unit Type: Frequency: Funding Source: Authorized Amount: Paid Amount: Save

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# The Children's Home Society of West Virginia

## caseTRACK

To edit an 'Other Services' Provider, select 'Providers' on the Main Toolbar and search for the provider name by either first or last name. Click on the provider name to edit the current provider.



After clicking on Edit you will complete the screen that appears.

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## 14. Classifications

This section includes such categories as legal status, education, employment, family structure, household type, and interests. This is a simple tracking mechanism for these categories. All foster children should have the legal status classification entered and any others as deemed appropriate.

### Add Classification

\* **Classification:**

**Start Date:**

**End Date:**

**Notes:**

Click on Save.



## 15. Collateral Contacts

Using caseTRACK's collateral contacts feature to store this information in a single place allows for shared access to this important information.

The Collateral Contacts section is used to organize and document relevant people in the life of the client (sibling, parent, guardian, teacher, GAL, their Multi-Disciplinary Team (MDT) members, etc.). To add a Collateral Contact to the client, click on the "Add Contact" link on the Collateral Contact section. Search for the contact first. Type all or part of a Contact Name or Agency Name and click 'Search'. Select the contact(s) you want to associate to your client by **checking the checkbox** and **selecting a role**. Click 'Save'.



If you do not click the checkbox and select a role, then the contact will not be connected to your client when you click 'Save'.

A client can have unlimited collateral contacts. Additional examples of collateral contacts are grandparents, therapists, teachers, clergy, tutor plus many others.

A single collateral contact can be associated with more than one client and can have different roles for different clients. For example, a collateral contact can be 'Teacher' to client A and also be 'Parent/Guardian' to client B.

A collateral contact can be currently or historically involved in the client's case.

### Benefits

Unlike storing contact information in a hard copy file in a storage room or in Microsoft Outlook, the clients contacts are organized and easily accessible by other caseTRACK users who might need the same information.

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## The Children's Home Society of West Virginia

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Because a collateral contact's information is shared, updated information flows instantly through to all clients associated with the contact.

The screenshot shows the 'Collateral Contacts' page in a Windows Internet Explorer browser. The page has a navigation bar with links: Home, Executive Dashboard, Service Signoff, Tasks Due, Providers, Reports, My Info, Transfer Clients, Help, and Non-Client Services. Below the navigation bar is a search section with a dropdown for 'My clients', a 'Search by Last Name' field, an 'AND DOB' field, and an 'OR Search By SSN or Medicaid #' field. A red callout points to the 'Go' button. Below the search section is a 'Search' section with a 'Search' button and a 'Search' field. A red callout points to the 'Search' button. Below the search section is a 'Results' section with a table of contacts. A red callout points to the 'Click to Associate to your client' button. A red callout points to the 'Select a Role and Start Date' dropdown. A red callout points to the 'Click to Add New Collateral Contact' button. A red callout points to the 'What if I don't see the contact I need?' link.

Click to Associate to your client

Select a Role and Start Date

Click to Add New Collateral Contact

What if I don't see the contact I need?

Contact Name	Contact Address	Email	Phone	Role	Start Date
<input type="checkbox"/> Smith, Sally	677 North US 1	ssmith@web.com	321-777-7777	- Select -	
<input type="checkbox"/> Burgin, Sally			850/562-0575	- Select -	
<input type="checkbox"/> Feehrer, Sally	4530 Shelfer Road	feehrs@mail.oakridge.leon.k12.fl.us	850.488.3124	- Select -	
<input type="checkbox"/> Parker, Sally		sally.parker@state.or.us	503-397-3292 x 8329	- Select -	
<input type="checkbox"/> Giordano, Sally			321-684-7279	- Select -	
<input type="checkbox"/> McClure, Sally				- Select -	

If you do not find the contact that you are looking for, you can add them to the system by clicking on the 'What if I don't see the contact I need?' A new screen will appear 'Add Collateral Contact'. Complete the form and click 'Save'.

**NOTE:** In the 'Summaries Section' there is currently one form that requires collateral contacts. The Initial Assessment requires the parents, WVDHHR worker, JPO and Other Caregiver to be entered as collateral contacts prior to entering the Initial Assessment information in caseTRACK. The collateral contact information is pulled through the system into the Initial Assessment report.

In the future there will be additional forms in the 'Summaries Section' that will require collateral contacts to be entered.

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# The Children's Home Society of West Virginia

caseTRACK

## 16. Schools

The School Section allows you to search for any school in the state of West Virginia where a client may be registered. Client school and school history information can be tracked. Google™ Maps to the schools are easily accessible by simply clicking on the “Map It” link in caseTRACK. You will click on “Add School” to begin adding the schools for the child. Type in the name of the school and click search. If the school that you are searching for is not in the database please contact the help desk. When the school you are searching for appears under School Results, choose the grade and the start date for the client. The start date will be the initial date that the client started the school. For example if the client is in the 10th grade, August 5, 2006 and the client started in the 9th grade, August 6, 2005, the client's start date would be August 5, 2005. Click 'Save'.

The screenshot shows the caseTRACK web application interface. At the top, there's a navigation bar with links like Home, Executive Dashboard, Service Signoff, Tasks Due, Providers, Reports, My Info, Transfer Clients, Help, and Non-Client Services. Below this is a search section with fields for 'My clients', 'Search by Last Name', 'AND DOB', and 'OR Search By SSN or Medicaid #'. The 'Search' button is highlighted. Below the search section is a table titled 'School Results' with columns: School Name, Address, Phone, County, Grade, Type, and Start. The table contains one entry: MORGANTOWN HIGH SCHOOL (056 - 502), 109 WILSON AVENUE, MORGANTOWN, WV, 26501, 304-291-9260, MONONGALIA. The 'Grade' dropdown menu is set to '- Select -'. A red circle with an arrow points to this dropdown menu, with the text 'Click to Select Grade, Type and enter Start Date' inside it.

School Name	Address	Phone	County	Grade	Type	Start
MORGANTOWN HIGH SCHOOL (056 - 502)	109 WILSON AVENUE, MORGANTOWN, WV, 26501	304-291-9260	MONONGALIA	- Select -	- Select -	

**NOTE:** In the ‘Summaries Section’ there is currently one form that requires schools. The Initial Assessment requires the client's schools to be entered prior to entering the Initial Assessment information in caseTRACK. The school information is pulled through the system into the Initial Assessment report.

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## 17. Indicators

The Indicators section documents behavioral indicators (current or historical) of the client and the client's mother and father. From alcohol abuse to bedwetting to withdrawn behavior, your client's behavioral indicators can be recorded in the system. You will click on "Add Behavioral Indicators" to select the behavior your client (mother, father) is exhibiting currently or historical data. Click on the check box for the behavior, then select who it applies to and indicate whether it is current or historical, and you can add notes. Click on Save!

When one (1) or more of the individuals have the same behavioral indicator you will need to select one individual and the behavior indicator and save the information. You will select the second individual and the indicator then save the information.

Behavioral Indicator	Applies To	Notes
<input type="checkbox"/> Alcohol use/abuse	- Select -	
<input type="checkbox"/> Arrest/criminal charges	- Select -	
<input type="checkbox"/> Bedwetting	- Select -	
<input type="checkbox"/> Defiance	- Select -	
<input type="checkbox"/> Developmental delay	- Select -	
<input type="checkbox"/> Developmental disability	- Select -	
<input type="checkbox"/> Drug use/abuse	- Select -	
<input type="checkbox"/> Eating disorder	- Select -	
<input type="checkbox"/> Fire setting	- Select -	
<input type="checkbox"/> Frequent crying	- Select -	
<input type="checkbox"/> Harmful to animals	- Select -	
<input type="checkbox"/> Lying	- Select -	
<input type="checkbox"/> Opposition	- Select -	
<input type="checkbox"/> Other	- Select -	
<input type="checkbox"/> Physical aggression	- Select -	
<input type="checkbox"/> Property destruction	- Select -	
<input type="checkbox"/> Running away	- Select -	
<input type="checkbox"/> Self-injuries behavior	- Select -	
<input type="checkbox"/> Sexual acting out	- Select -	
<input type="checkbox"/> Sexual offender	- Select -	
<input type="checkbox"/> Sleep disturbance	- Select -	
<input type="checkbox"/> Soiling	- Select -	


## 18. Medications

The Medications section documents the medications that a client is currently taking or has taken in the past. Track the medications used by your clients, including start and end dates and dosages. Additional information such as warnings, uses, side effects and what to do in cases of overdose are quickly accessible by clicking on the WebMd™ link in the system.

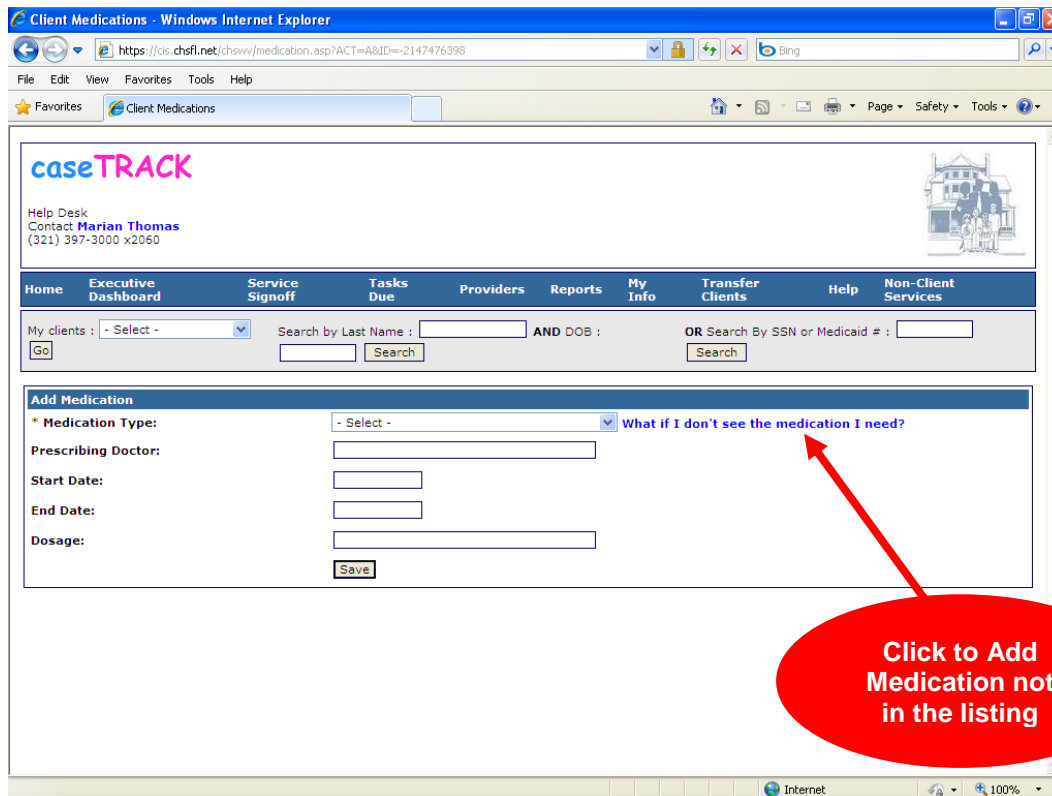
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## The Children's Home Society of West Virginia

### caseTRACK

To add a medication, click on the Medications section, click 'Add Medications', select the medication type from the dropdown box, enter the Prescribing Doctor, the start date, end date (of prescription), the dosage and click 'Save'. To end a Medication, click on the Medication section, click the edit icon  enter the end date and click 'Save'.

If you do not find the medication that you are looking for in the dropdown box, click on the "What if I don't find the medication I need?" link to add the medication.



**NOTE:** In the 'Summaries Section' there is currently one form that requires medications. The Initial Assessment requires the client's medications (current & historical) be entered prior to entering the Initial Assessment information in caseTRACK. The medication information is pulled through the system into the Initial Assessment report.

## 19. AKAs

This section documents "Also Known As (AKA)" names that the client may have. To add a new AKA, click the AKA section header to open the section. Click 'Add Other Name', select the Name Type, enter the AKA First Name and enter the AKA Last Name and click 'Save'.

**NOTE:** You will use this section for those children who have been adopted. The new adopted name will be entered in this AKA section. You type in the adopted name and use the "Legal Name" as the type. **Do not change** the case name by renaming the children in caseTRACK!

# The Children's Home Society of West Virginia

## caseTRACK

Client AKAs - Windows Internet Explorer

https://cis.chswv.net/chswv/akas.asp?ACT=A&ID=-2147476398

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Help Desk  
Contact **Marian Thomas**  
(321) 397-3000 x2060

Home Executive Dashboard Service Signoff Tasks Due Providers Reports My Info Transfer Clients Help Non-Client Services

My clients : - Select - Search by Last Name : AND DOB : OR Search By SSN or Medicaid # :  
Go Search Search

Add Client AKA

\* Type: - Select -  
\* First Name:  
Middle Name:  
\* Last Name:

Save

Select AKA type then enter first, middle and last name

## 20. CFARS

The Society currently does not use this function. (However, we are currently taking initial steps to use this assessment. In time this assessment will be used for shelter, foster and adoptive children and others. Staff will need to be trained and credentialed to complete this assessment.)

To add a CFARS, click the CFARS section header to open the section. Click 'Add CFARS'. Fill out all required fields and click 'Save'. The CFARS detail on the client record will display the Purpose of Evaluation, Date of Evaluation and the CFARS Score.

To print a CFARS, click on the View link under the CFARS section header and click the printer icon on the top left corner of the CFARS form. Select All or Pages to print, click Print, select Open, select Open once again which switches the form into an Adobe file, and then click File and Print.



# The Children's Home Society of West Virginia

caseTRACK

## 21. Outcomes

To add a Mental Health Outcome form, click the Outcome section header to open the section. Click 'Add Outcome'. Fill out all required fields and click 'Save'.

Client Outcomes - Windows Internet Explorer

https://cis.chsfl.net/chswv/client\_outcomes0607.asp?ACT=A&ID=-2147476398

File Edit View Favorites Tools Help

Client Outcomes

**Add Performance Outcome** HENRY TESTCHILD

\* Purpose of Performance Evaluation: - Select -

\* Evaluation Date: 3/27/2012

\* Initial Evaluation Date:

\* Primary Diagnosis (ICD9): - Select -

\* Staff ID: - Select -

\* Primary Income Source: - Select -

\* Receives Psychiatric Disability Income: No

\* Prognosis: No

\* Dependency/Criminal Status: - Select -

\* Admission Type: - Select -

\* Days Spent in Community (no more than 30): 0

\* Total School days available (in the last 30 days): 0

\* Total School days attended (in the last 30 days): 0

\* CGAS Scale Rating:

\* Was the child committed or recommitted to DJJ in the last 30 days?: No

\* At Risk of Emotional Disturbance: No

\* Residential Status: - Select -

\* Marital Status: - Select -

\* Employment Status: - Select -

\* County of Residence: - Select -

\* Highest Grade Level Completed: - Select -

Developmental Disabled: No

Physically Disabled: No

Visually Impaired: No

(Form continues in caseTRACK)



Please be aware that you must input a diagnosis under the Diagnosis section in order to complete your MH Outcomes form.

The View and Print functions are not currently working in the Outcomes section.

## 22. FARS

The Society currently does not use this function. (However, we are currently taking steps to allow staff to use this assessment. In time this assessment will be used for the families with whom we work. Staff will need to be trained and credentialed to complete this assessment.)

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# The Children's Home Society of West Virginia

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## 23. Summaries

Currently we have four (4) summaries in this Section: Family Home Study, Family Home Study Re-evaluation, Incident Report and the Initial Assessment.

To add a summary you will click on "Add Summary." You will then choose the summary type from the dropdown box and then enter the date of the document. Now you will complete the text boxes in the form. When you have completed your data entry you must "Click on Save!" or you will lose your information.

**NOTE:** When you are completing the large summary forms (such as the Initial Assessment, Family Home Study & Re-evaluation) you may want to save the data frequently to reduce the possibility of losing the entered data.

Client Summaries - Windows Internet Explorer

https://cis.chsfll.net/chswv/client\_summaries.asp?ACT=ABID=-2147476398

caseTRACK

Help Desk  
Contact **Marian Thomas**  
(321) 397-3000 x2060


Home Executive Dashboard Service Signoff Tasks Due Providers Reports My Info Transfer Clients Help Non-Client Services

My clients : - Select - Search by Last Name : AND DOB : OR Search By SSN or Medicaid # :  
Go Search Search

Add Summary

\* Summary Type: - Select -  
Date: - Select -  
Family Home Study  
Family Home Study Re-Evaluation  
Incident Report  
Initial Assessment

Currently we have 4 Summary reports.

 Foster care and Adoption staff may begin using the Family Home Study and Family Home Study Re-evaluation in caseTRACK. The Incident Report and Initial Assessment work well in the caseTRACK MIS. We are currently developing more summary reports for staff use.

After saving the document this screen will appear:

**The summary was saved successfully.**  
**Click here to print this summary or**  
**Click here to edit the summary or**  
**Click here to continue working with this client.**

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Click on the first link to print the document. At that time a new screen will appear – DO NOT print this screen. At the top of this screen you will see the **Export** dropdown box at the far right corner. Select Acrobat (PDF) file and click on Export. The file download screen will appear and you may either open the file or save it. To print open the file and click on print. You will then sign your name and add credentials, add the signature date to the document. File it in the appropriate paper case record.

## 24. Documents and Images

Photos, copies of birth certificates, court orders, etc. can be uploaded to caseTRACK and are easily viewed and printed without hunting through cabinets and bulky client files.

To add a document click “Add Image” then complete the screen. You will enter a date and type of document. There are several different types of documents you may choose from in the listing. If you are uploading a child’s photograph make sure you always choose “Photo” in the listing. You may add a document name and description then browse for your document to be uploaded. When you have selected your document “Click Save!”

The screenshot shows a web browser window titled "Documents and Images - Windows Internet Explorer". The address bar shows the URL: <https://cs.chsf.net/chswv/images.asp?ACT=A&ID=-2147476398>. The page displays the caseTRACK logo and a help desk contact for Marian Thomas. A navigation menu includes Home, Executive Dashboard, Service Signoff, Tasks Due, Providers, Reports, My Info, Transfer Clients, Help, and Non-Client Services. Below the menu is a search section with fields for "My clients", "Search by Last Name", "AND DOB", and "OR Search By SSN or Medicaid #". The main content area is titled "Add Document/Image" and contains the following fields:

- \* Document Date: [Text Input]
- \* Document Type: [Dropdown Menu]
- \* Document Name and Description: [Text Area, up to 255 characters]
- \* Document File: [Text Input] with a "Browse..." button
- [Save] button

**NOTE:** If you have a document saved in a photo format: jpeg, tiff, gif, etc. you will need to upload the document as a photo.

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## 25. Other Identification

caseTRACK's "Other Identification" feature allows a user to record additional information about a client such as Driver's License #, client IDs, etc. Adding this additional information can be helpful when you are viewing a client's electronic file, but it can also serve 2 other important functions.

**Cross-System Reporting:** If your client is a part of several programs and each program has its own assigned "Client ID" or "Case ID", the "Other Identification section can be used to record this other ID. Once the ID is recorded it allows us to run cross-system reports to verify accuracy and maximize on the data stored both locally and in other systems. We eliminate the need to duplicate data entry and provide a more comprehensive view of our clients.

**Grouping Clients as a "Case":** Many times we serve more than one client in a family. In these cases we may assign a 'Family ID' or 'Sibling ID' for the whole group. In caseTRACK, each client is created in the system. So how do you group these multiple clients into one "case"?

Each program can create a distinct ID to group clients together as a unit. For each client, create an identical "Other ID" in the same format and at that point they are linked. We can report on distinct "cases" and you can easily navigate between clients involved in the case by clicking on the respective ID.

### Foster Parent License Identification Numbers

**Resource Parents:** foster and adoptive parents will use a **twelve** (12) alphanumeric Our Family ID number.

Example - OF010251VRT0: OF=Our Family, 010251 is the birth date of head of household, VRT=initials of the head of household, 0 {zero} is at the end in the event there is a duplicate you would use a 1 instead of 0.

Resource Parent case records will have only one Our Family ID number. In a two-parent family this number is created from the head of the household; this may be either parent, such as Parent 1 on the Application. Both parents will use the same number thereby linking them.

Add Other Identification	
* <b>Identification Type:</b>	Foster Parent License ID ▼
* <b>Identification Description/Number:</b>	OF010251VRT0
<b>Issuing State:</b>	West Virginia ▼
<b>Start/Effective Date:</b>	2/1/2011
<b>End/Expiration Date:</b>	
<input type="button" value="Save"/>	

You will connect the foster and adoptive children to the appropriate resource family by using the Other Identification feature. As long as the resource parents and the children have the same "Foster Parent License ID" they will be connected. When the foster or adoptive child is removed from the resource family or is discharged from the program, you will close the family ID number in the child's record in the 'Other Identification' section. You will edit the information by inserting an End Date.

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# The Children's Home Society of West Virginia

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## Edit Other Identification

\* **Identification Type:** Foster Parent License ID

\* **Identification Description/Number:** OF010170RXT0

**Issuing State:** West Virginia







**Start/Effective Date:** 3/30/2012

**End/Expiration Date :** 4/2/2012

[Save](#)

Respite  
placement  
dates and  
Foster  
Parent  
License ID

## Other Identification (3)

ID Type	Number	Issuing State	Expiration Date	
Foster Parent License ID	<a href="#">OF010251VRT0</a>	WV		 
CHS ID Number	<a href="#">020300MHBT0</a>	WV		 
Foster Parent License ID	<a href="#">OF010170RXT0</a>	WV	4/2/2012	 

Client Case ID =  
CHS ID Number

## Client Case Identification

All clients will use an eleven (11) alphanumeric CHS ID number.

The CHS ID number assigned to a client will be constructed from the following data and in the following manner:

- Client's Birth Date in 'mmddyy' format, followed by
- Gender using 'M' or 'F' (use upper case letters), followed by
- Client's first, middle and last initials (use upper case letters). Where no middle initial exists, '9' will be used as the missing initial. Where a client has more than first, middle and last names, use the first middle initial only.
- The final digit in the case number will be a "0." In the case of clients received into care that have with the same birthday and the same initials, use "0" as the final digit for the first client, "1" as the final digit for the second client, etc. All letters in the client designation will be uppercase.

Examples:

- John Joe Doe, born 4/1/85 becomes: 040185MJJD0
- Janet A. Jones, born 1/22/76 becomes: 012276FJAJ0
- Michael (NMI) Smith, born 4/3/59 becomes: 040359MM9S0
- Joseph (NMI) Smythe, born 9/26/98 becomes: 092698MJ9S0
- Janet L. Jones and Julie L. Jones born 9/12/90 become: 091270FJLJ0 and 091270FJLJ1

## Sibling Group ID#

Use the oldest known sibling's ID# and add SG at the end. Siblings will use a thirteen (13) alphanumeric 'Sibling ID' number.

For the John Joe Doe sibling group: 040185MJJD0SG

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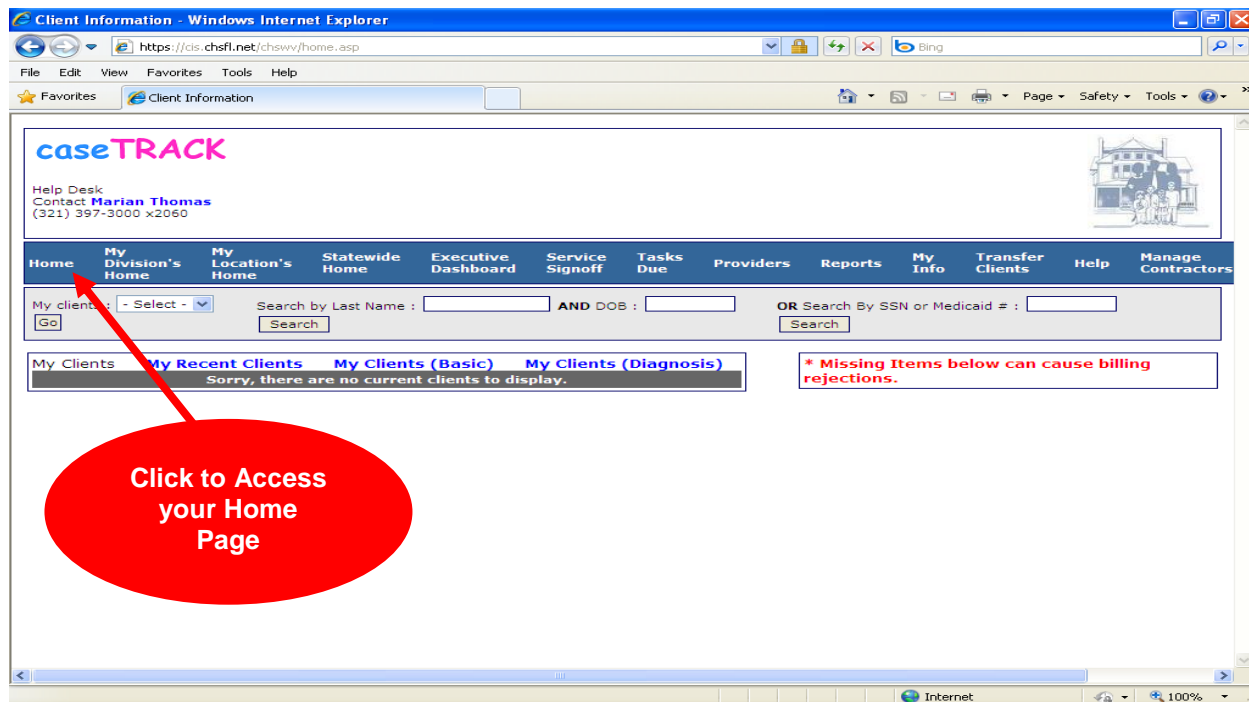


# The Children's Home Society of West Virginia

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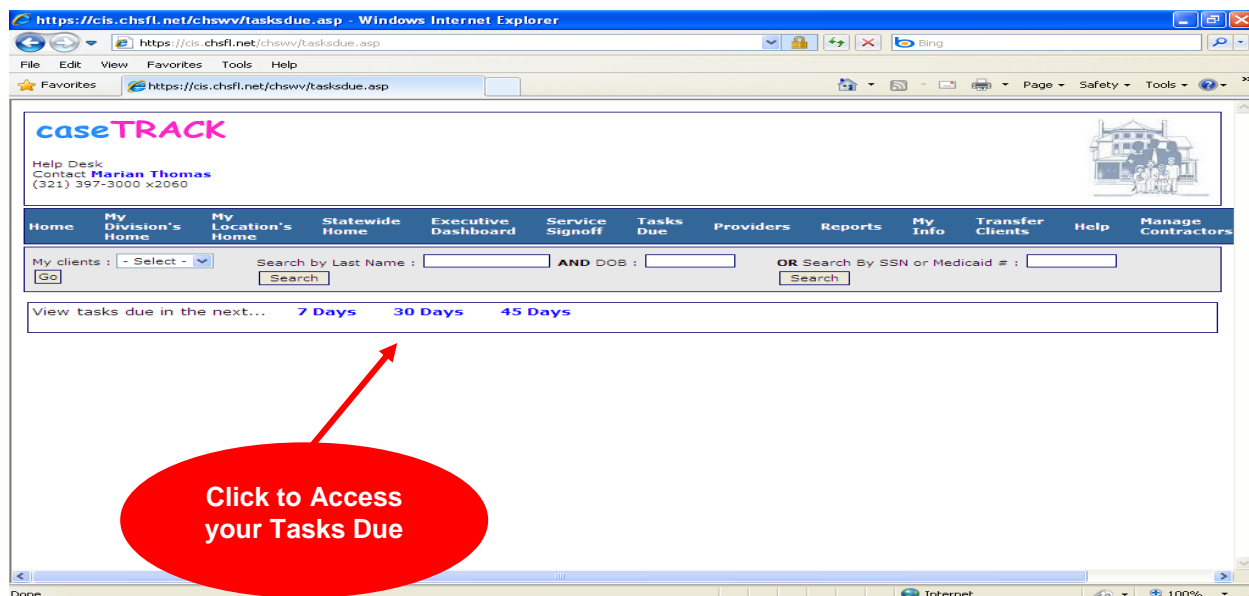
## IV. Home

The Home section on the caseTRACK Main Toolbar allows you to return to your 'My Clients' page at any time.



## V. Task Due

The Society currently does not use this function. We have taken initial steps for future development. The Task Due section on the caseTRACK Main Toolbar allows you to view program specific tasks that are due in 7, 30 and 45 Days. Click on Tasks Due and select the timeframe. The tasks are color-colored and ranked in descending order based on automatic due dates according to the client's admission date.



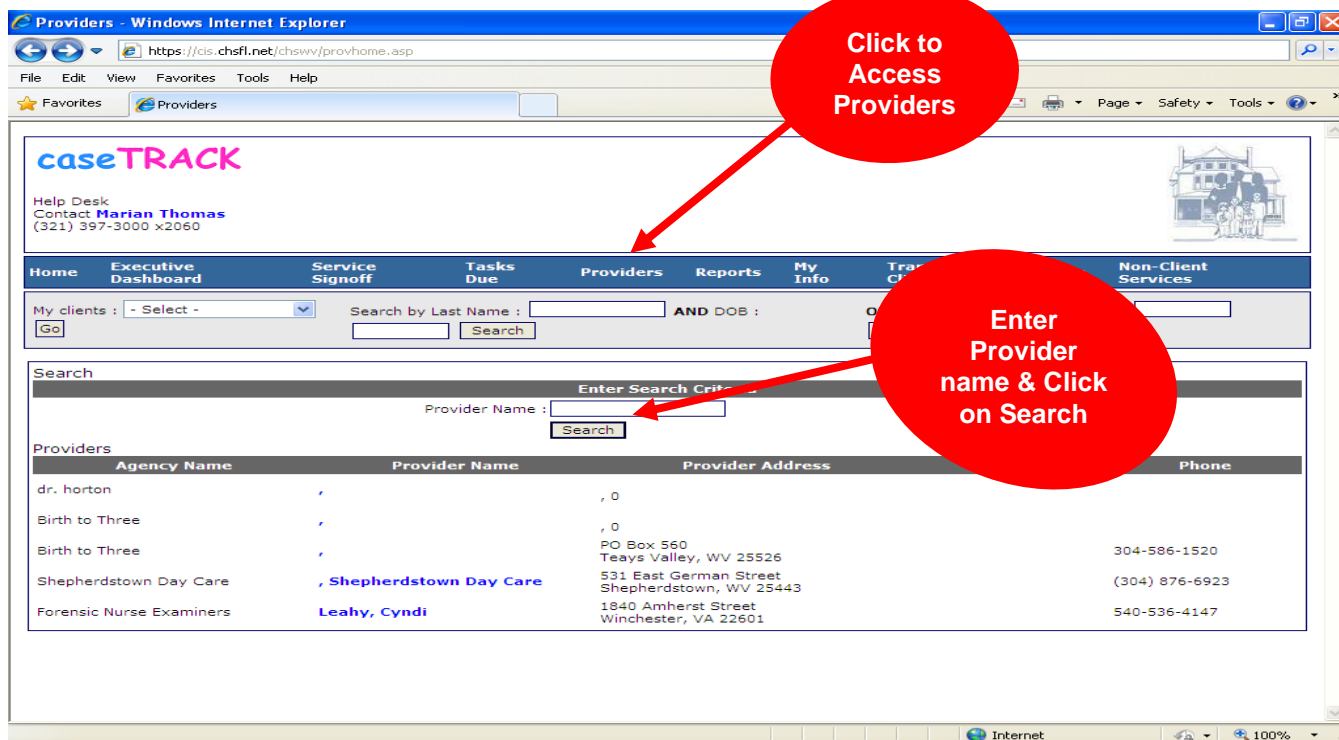
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# The Children's Home Society of West Virginia

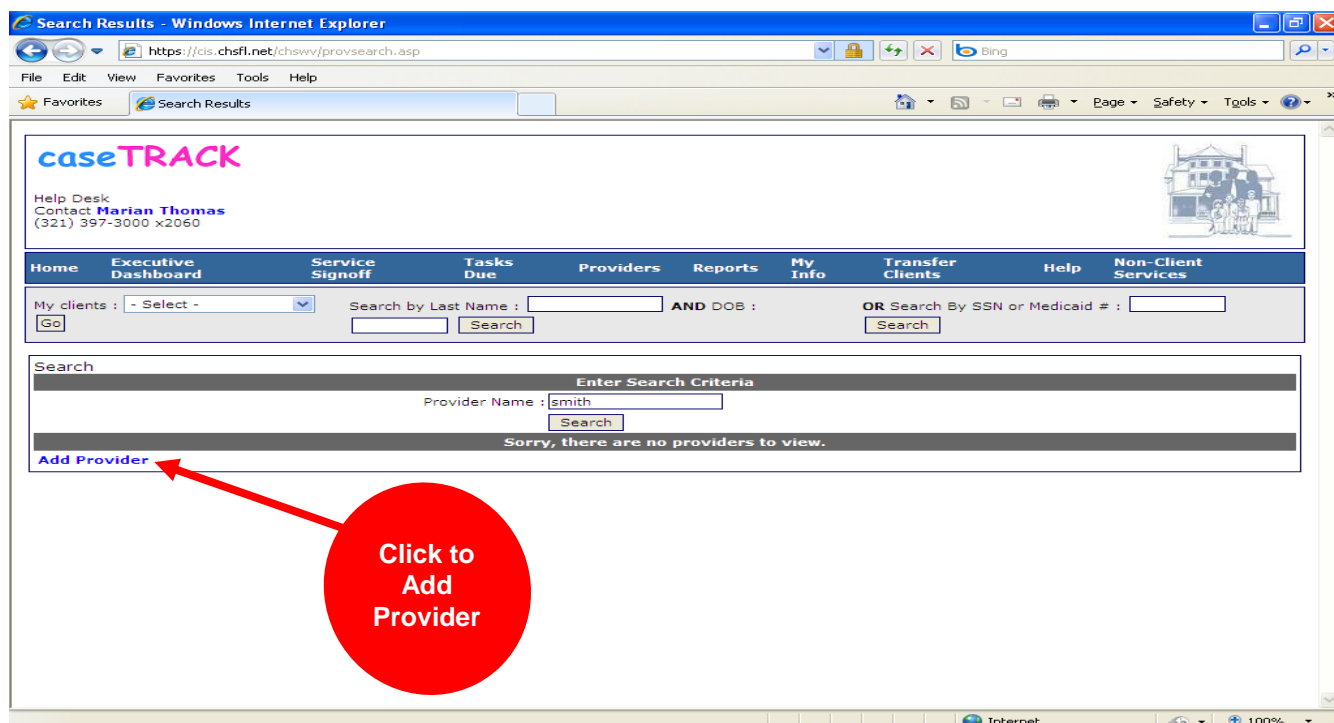
caseTRACK

## VI. Providers

The Providers section on the caseTRACK Main Toolbar allows you to view, edit and add providers to the database. Click on Providers to view the entire provider list. When the provider is not on the main provider list you may search for your provider.



If you still do not see your provider then type in the Provider name and click on search. If you do not find the provider, click 'Add Provider' highlighted in blue.



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## The Children's Home Society of West Virginia

### caseTRACK

To add a provider you will complete all required fields and click 'Save'. Your provider will be added to the main provider list.

Add Provider	
Tax ID:	<input type="text"/>
* Agency Name:	<input type="text"/>
* Contact First Name:	<input type="text"/>
Contact Middle Name:	<input type="text"/>
* Contact Last Name:	<input type="text"/>
Email Address:	<input type="text"/>
Phone Number:	<input type="text"/>
Mobile Number:	<input type="text"/>
Fax Number:	<input type="text"/>
Other Phone Number:	<input type="text"/>
Physical Address	
Address:	<input type="text"/>
Address (cont):	<input type="text"/>
City:	<input type="text"/>
State:	<input type="text" value="- Select -"/>
Zip:	<input type="text"/>
Mailing Address	<input type="checkbox"/> Same as Physical Location
Address:	<input type="text"/>
Address (cont):	<input type="text"/>
City:	<input type="text"/>
State:	<input type="text" value="- Select -"/>
Zip:	<input type="text"/>
Comments:	<input type="text"/>
<input type="button" value="Save"/>	

**NOTE:** To edit a provider, please follow the directions under the '**Other Services**' section (pages 25-28).

# The Children's Home Society of West Virginia

caseTRACK



## VII. Reports

The Reports section contains standard reports for the system. Throughout this section the screen shots and comments are generally based on the view accessible to social work staff. To access the reports, click on the Reports section header of the Main Toolbar. There are eight (8) categories of reports: Admin, Demographics, Licensing, Mentoring, Non-Client Specific, Other, Productivity and QM. Supervisors have two (2) additional report categories: Client Summaries and Medications. Additionally in each category supervisors will have more reports than the staff.

Report Category	Available Reports
+ Admin	4
+ Demographics	5
+ Licensing	2
+ Mentoring	1
+ Non-Client Specific	1
+ Other	1
+ Productivity	5
+ QM	1

Report Category	Available Reports
+ Admin	8
+ Client Summaries	1
+ Demographics	12
+ Licensing	2
+ Medications	1
+ Mentoring	1
+ Non-Client Specific	1
+ Other	2
+ Productivity	12
+ QM	5

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# The Children's Home Society of West Virginia

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Supervisor's Report  
Categories with Admin  
report labels showing

**Admin section** is a reporting section used by supervisor and compliance. For example: 'Diagnosis 999' report showing how many clients are in the database with an unknown diagnosis over 30 days. The 'Progress Note Override' report is a management tool for the supervisor. It provides the progress note password for staff who has not entered the progress notes in a timely manner. After three (3) days the password will be required.

On the next page there is a screen shot of Admin reports available to staff. Currently the two (2) reports 'Diagnosis 999' and 'My Regions Case Summary Served' are for staff use.

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# The Children's Home Society of West Virginia

caseTRACK

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Help Desk  
Contact **Marian Thomas**  
(321) 397-3000 x2060

Home Executive Dashboard Service Signoff Tasks Due Providers Reports My Info Transfer Clients Help Non-Client Services

My clients : - Select - Go Search by Last Name : AND DOB : OR Search By SSN or Medicaid # : Search

Report Category	Available Reports
- Admin	4
Report Name	Report Description
Diagnosis 999	This report lists your clients and your workers clients who have been admitted for 6 months or longer who are missing a diagnosis.
My Region's Cases Served Summary	This report shows the total cases and clients served for your Region and Program(s) selected during the specified period. Drilldown to the summary data to view clients demographic information.
My Region's Missing Admission Outcomes/Cfars	This report lists all active clients with missing admission outcomes measure and/or cfars. Source: CIS.
My Region's Outcomes Audit	This report lists all active clients with missing outcome measure; or their admission outcome measures include one of these diagnosis code (999, 799.9, 71.09)
+ Demographics	5
+ Licensing	2
+ Mentoring	1
+ Non-Client Specific	1
+ Other	1
+ Productivity	5
+ QM	1

**Demographic section** reports summarize active caseload data statewide by division, location, supervisor, and caseworker including face sheet information. Click on each Report name to access the report.

caseTRACK

Help Desk  
Contact **Marian Thomas**  
(321) 397-3000 x2060

Home Executive Dashboard Service Signoff Tasks Due Providers Reports My Info Transfer Clients Help Non-Client Services

My clients : - Select - Go Search by Last Name : AND DOB : OR Search By SSN or Medicaid # : Search

Report Category	Available Reports
+ Admin	4
- Demographics	3
Report Name	Report Description
Demographics Summary (by Clients Served)	This report shows a demographic breakdown of clients served for a specified Region and Program.
My Agency's Clients Served Summary	This report summarizes the clients served in one or more Region's for a specified time frame.
My Region's Demographics Summary (By Admissions)	This report shows a demographic breakdown of clients admitted, with client details, for your Region and a specified Program and date range.
+ Licensing	2
+ Mentoring	1
+ Non-Client Specific	1
+ Other	1
+ Productivity	5
+ QM	1

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## The Children's Home Society of West Virginia

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On the previous page there is a screen shot of Demographic reports available to staff. Currently the reports 'Demographic Summary (By Clients Served)', 'My Agency's Clients Served Summary' and 'My Region's Demographic Summary (By Admissions)' are for staff use.

**Licensing section** reports indicates active licenses, licenses that are expiring and those that have expired.

Report Category	Available Reports
+ Admin	4
+ Demographics	5
- Licensing	2
Report Name	Report Description
My Region's Licenses Active	This report shows all active licenses for a given program and date range.
My Region's Licenses Expiring	This report shows all clients in a given program with expiring licenses in the date range specified or no license record at all.
+ Mentoring	1
+ Non-Client Specific	1
+ Other	1
+ Productivity	5
+ QM	1

The 'Demographic Summary (By Clients Served)' report shows a demographic breakdown of clients served for a specified Region and Program during a specific reporting period.

'My Agency's Clients Served Summary' report summarizes the clients served in one or more Region's for a specified time frame in a pie chart format.

My Region's Demographic Summary (By Admissions)' report shows a demographic breakdown of clients admitted, with client details, for your Region and a specified Program and date range.

**Mentoring section** reports are not currently being used by the Society.

**Non-Client Specific section** reports are not currently being used by the Society however initial steps have been taken to further develop this section for future use.

**Other section** reports are not currently being used by the Society.

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# The Children's Home Society of West Virginia

## caseTRACK

**Productivity section** reports summarize your billable progress notes, and billing coversheets individually or collectively for a user defined date range. Click on each Report name to access the report.

Currently social work staff members have three (3) reports for their use: 'Progress Notes', 'Total Billable Units by Worker' and 'Worker Timesheet'.

Report Category	Available Reports
+ Admin	4
+ Demographics	5
+ Licensing	2
+ Mentoring	1
+ Non-Client Specific	1
+ Other	1
- Productivity	5

Report Name	Report Description
<a href="#">My Clients' Services By Funding Source</a>	This report shows billable services recorded for your clients for a specified funding source and date range.
<a href="#">My Clients' Units Remaining</a>	This report shows all clients clients you and your staff are assigned to and their funding sources, client ids, authorization numbers, unit rendered and units remaining.
<a href="#">Progress Notes</a>	This report summarizes your progress notes for a user defined date range.
<a href="#">Total Billable Units By Worker</a>	This report summarizes the total billable units submitted by Region, Location, Supervisor and Worker in a specified date range.
<a href="#">Worker Timesheet</a>	This report shows the time spent by worker for the reporting period. Source: CIS.

The 'Progress Notes' report shows progress notes with service dates within the reporting period.

The 'Total Billable Units By Worker' report summarizes the total billable units submitted by Division, Location, Supervisor and Worker between the reporting period dates.

The 'Worker Timesheet' reports the progress notes entered in the system during a specific reporting period. This report will show progress notes entered during the reporting period and some of the service date may be outside of the report period.

All reports are based on the caseload of the worker. New reports will be added to this section as the caseTRACK system develops over time.

**QM section** contains one (1) report for social work staff. This report shows all clients served during a specified time period for a Region with all programs or a specific program within your Region.

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## The Children's Home Society of West Virginia

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### Additional Supervisor Sections

#### Client Summaries

This report lists all summaries for your region and a specified program, summary type and date range.

Report Viewer - Windows Internet Explorer

https://reportingservices.chsfi.net/ReportServer/Pages/ReportViewer.aspx?/CIS/CH5W/rpt\_MyDivisionsClientSummaries&rs%3aCommand=Render

Select a Program: Foster Care - Children

Select a Summary Type: <Select a Value>

Please enter the report start date:

Please enter the report end date:

View Report

Supervisor's Report  
Current summaries  
include the Initial  
Assessment,  
Incident Report,  
Family Home Study  
and Family Home  
Study Re-evaluation

### My Region's Children on Medications

This report shows all active children in a specific Region on medication(s) for a specific program.

## Children on Medications

**Division:** REGION I

---

**Program:** FOSTER CARE - CHILDREN

---

CLIENT NAME	SSN	DOB	MED. COUNT
M, J		7/20/2004	4
E, A		11/18/2002	2
S, D		12/17/2008	2
H, K		1/8/2001	2

**CLIENTS COUNT: 4**

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# The Children's Home Society of West Virginia

caseTRACK

## VIII. My Info

In the My Info section you can add your Rater ID, Credentials, Program and Progress Note template.

My Info - Windows Internet Explorer

https://cis.chsfl.net/chswv/myinfo.asp

File Edit View Favorites Tools Help

Go Search

**Edit Info**

Division: Region I

Location: 01MORGANTOWN

Department: FC/ADOPT

Supervisor: SCHMIDT, KURT

Name: SARAH R. THUMM

Title: SW-FC

CFARS Rater Certification Number: 00-000000000 (Format: ##-#####)

FARS Rater Certification Number: 00-000000000 (Format: ##-#####)

Medicaid Provider ID:

Credentials: BSW

Contractor ID:

National Practitioner Identifier (NPI):

Program: Foster Care - Children

Progress Note Template:

Client Present:  
Individuals Contacted/Present:  
Purpose(s) of Event:  
Type of Contact:  
Purpose:  
Content:

Save

## IX. Additional Features

### 1. Using QuickLinks For More Efficient Data Entry

The “My QuickLinks” feature was created to make for more efficient navigation throughout caseTRACK.

With QuickLinks, you can:

- Customize your caseTRACK client page so that the details you add most frequently appear at the top of the page.
- Order your commonly used links in an order that makes sense to you.
- And add details without scrolling down the page to find the “Add Medications” or “Add Progress Note” links.

To set up “My Quicklinks”

1. Open a client's record.
2. Find My QuickLinks above the [View Demographic Form](#) link, on the left side of the screen.
3. Click [Edit](#).

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## The Children's Home Society of West Virginia

caseTRACK

The screenshot shows the top navigation bar with three tabs: 'Home', 'My Location's Home', and 'Executive Dashboard'. Below the tabs is a section titled 'My clients :'. It contains a dropdown menu with '- Select -' and a 'Go' button. Below this is a section titled 'My QuickLinks (Edit)'. It contains two links: 'View Demographic Form' and 'View Client'.

4. Click **Add QuickLinks**.

The screenshot shows a section titled 'My QuickLinks'. It contains two buttons: 'Add QuickLink' and 'Done'.

5. At Link select, the QuickLink you would like to add.  
**Note:** The links you can see are limited to the functions for which you have permission.
6. Use the Sort Position select to set the position that you want your section to appear.
7. For example: if you use Progress Notes regularly, make this selection number 0 or 1. If you set all your sort positions to the same number, the QuickLinks will appear in alphabetical order.
8. Click the "Save" button.
9. Now you can click on **Add QuickLinks** to add more links or click **Done** if you are finished adding your QuickLinks.

## 2. Resource Parent Licensing

In **caseTRACK**, resource parents (foster and adoptive parents) are recorded as clients. This enables users to associate any number of addresses, phone numbers, tasks (such as required documentation and screenings), etc.

In addition, one of **caseTRACK**'s features is the Licensing feature. You can add this vital information to your resource parent's electronic record by simply adding 2 quicklinks:

- Add a License
- View Licenses

Once you have added these quicklinks, you will be able to easily maintain current and historical license information for your resource parents.

### Add a License

To add license information for your resource parents (Head of Household), search for and select the resource parent's record to go to the client information page.

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## The Children's Home Society of West Virginia



Click the “Add a License” quicklink at the top of the client information page. Fill out the license information and click “Save”. You have now associated a new license record to the foster parent.

### Add License

\* **Type:**

\* **Received Date:**  (Same date as Effective Date)

\* **Effective Date:**

**Expiration Date:**  (if left blank, will default to 1 year from effective date.)

\* **Capacity:**

\* **Status:**

**Closure Reason:**  (required if Status="Closed-Voluntary")

**Notes:**

### View Licenses

To view or edit an existing license, click the “View Licenses” quicklink at the top of the parent's client information page.

This will open another window with the foster parent's license(s). To view the license, click the view icon, to edit the license, click the edit icon. To delete the license, click the delete icon.

### License(s)

Type	Effective Date	Expiration Date	Capacity	Status	Close Reason		
Re-license	3/1/2012	8/1/2012	6	Active			
Re-license	8/1/2011	3/1/2012	1	Active			
Initial	8/1/2010	8/1/2011	4	Expired			

**Note:** The only reason to 'delete' a license is if the license information was entered in error originally. There is no need to 'delete' an old license if there is a new license that supersedes the old. Instead you can edit the license and change the license status to 'expired'.

### Available Reports

These reports are currently available in the reports category, Licensing:

- My Division's Licenses Expiring  
Displays the Licenses expiring in a user specified date range.
- My Division's Licenses Active  
Summarizes the active homes and licensed beds in your division.

## The Children's Home Society of West Virginia

### caseTRACK

### 3. Transfer Clients

Recently a user called and said, "One of my workers got reassigned and I need to transfer all of her clients to someone else. Do I have to do this one at a time?"

If you are a supervisor you should be able to do this using the 'Transfer Clients' feature in caseTRACK.

If you have permissions you should see this option on caseTRACK's main menu. Click it and you will see the Transfer Clients form.

Select the worker you are transferring from and then fill out the rest of the form. Check the clients you wish to transfer and then click 'Transfer'.

Using the 'Transfer Date', this feature ends the 'Transfer From' worker assignment for all the selected clients and adds a new worker assignment record for the 'Transfer To' worker.

### X. Help



If you experience any problems with the caseTRACK system or if you have any questions or requests, there are several ways to access Help:



Email: Help Desk participants Jeff Blankenship [jblankenship@childhswv.org](mailto:jblankenship@childhswv.org), George James [gjames@childhswv.org](mailto:gjames@childhswv.org), and Cliff Terrell [cterrell@childhswv.org](mailto:cterrell@childhswv.org). Please include details of what was being done at the time of the error and copy & paste the error message received.



Contact our Help Desk by calling Jeff Blankenship, George James or Cliff Terrell at 304-346-0795. Please include details of what was being done at the time of the error and the error message received.

As your co-workers, we continue to develop this system to allow you to spend more time serving our clients and their families. Your ideas, comments and suggestions will help us to continue to develop the system.