



**Lutheran Immigration
and Refugee Service**

CSCMS V.2.4.3
LIRS Local User
Manual
November 2015

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Place the cursor on a title and **control click** the *title*.

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1. IT Requirements for CSCMS

1.1 Browser Compatibility

The Children's Services Case Management System (CSCMS) database is made for **Internet Explorer 11 (IE 11)** and **Google Chrome**.

OTHER BROWSERS (like Firefox, Google, others) MAY NOT WORK FOR CSCMS and cause errors.

1.2 Settings and Best Practices for using CSCMS

The following guidelines will help to ensure that your computer system is set for optimum use of the database.

- **Shut Down** your computer before you leave each workday. DO NOT hibernate and restart in the morning; this will NOT clear the internet browser. Getting in the habit of shutting down and starting back up will restore resources and ensure upgrades are received.
- Configuring the internet browser to clear the cache is explained below for Internet Explorer.

Fig. Clear Internet Cache Pg. 1

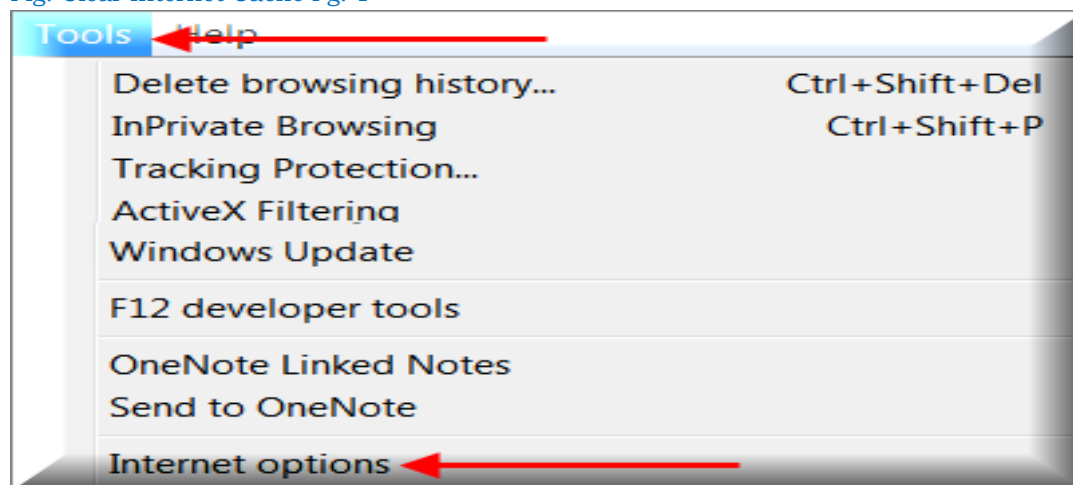
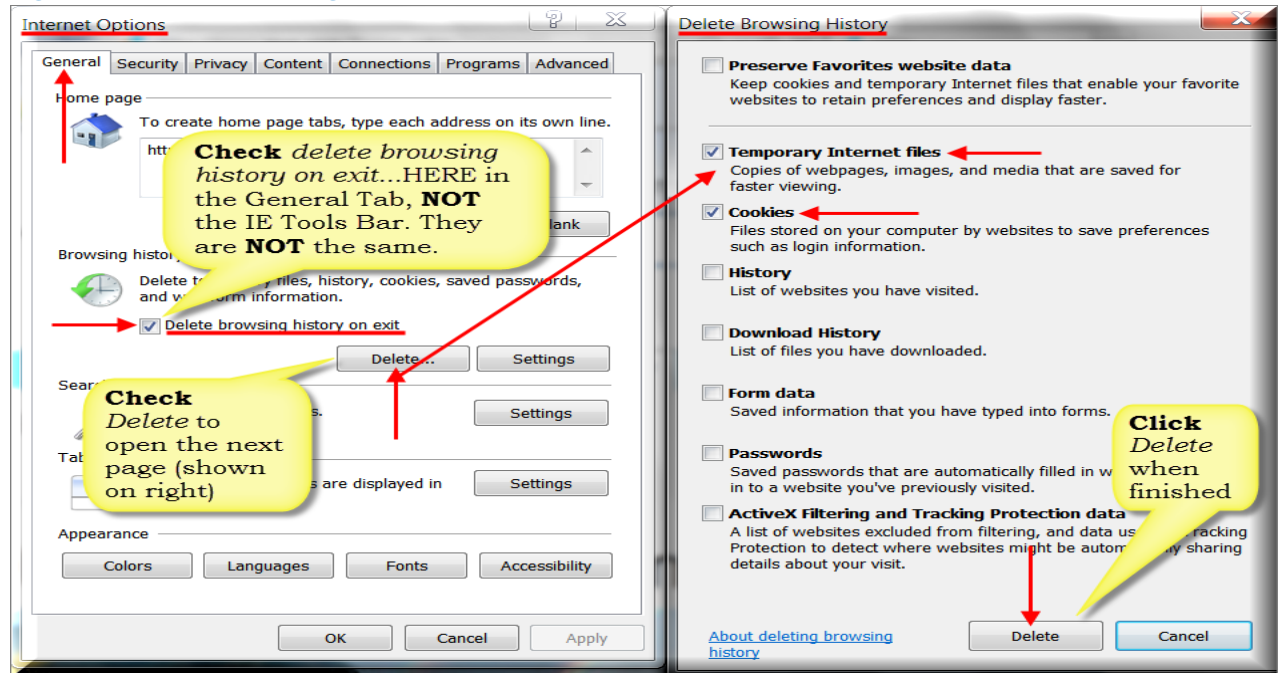


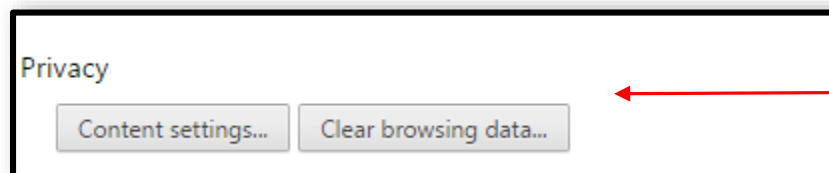
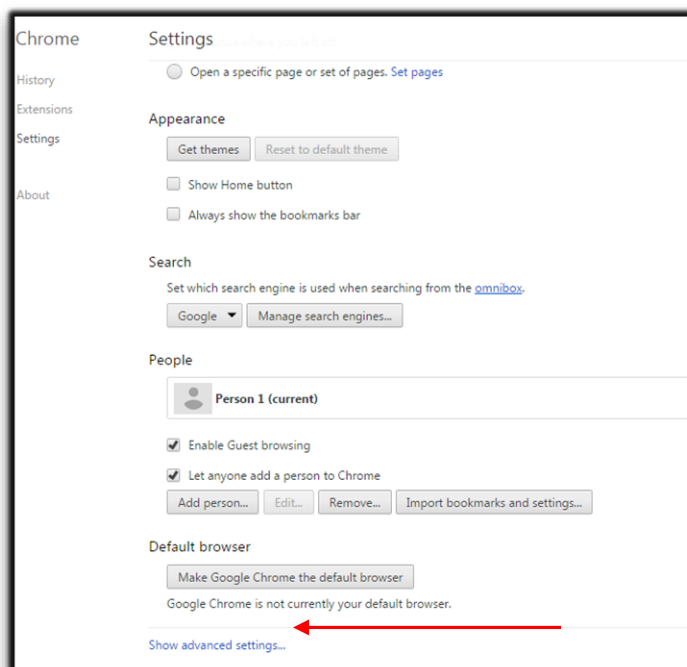
Fig. Clear Internet Cache Pg. 2



- ❖ Configure the IE Browser to auto-clear the cache
 - Open IE, **Click Tools**
- ❖ **Click** Internet Options, (Fig. Clear Internet Cache Pg. 1)
- ❖ **Check** Delete browsing history on exit* check box, (Fig. Clear Internet Cache Pg. 2)
 - **Click** Delete Button to enter set-up page (Fig. Clear Internet Cache Pg. 2)
- ❖ **Check** Temporary Internet files and Cookies check boxes (check or uncheck other boxes if needed)
 - **Click** Delete button to set and exit page
- ❖ 💡 NOTE: The Delete browsing history on exit check box in the General Tab page sets this function to execute automatically every time the computer restarts (a complete shutdown). The Delete browsing history in the IE Tools bar works once each time it is clicked and cannot be set to work automatically.

➤ Configuring the internet browser to clear the cache is explained below for Google Chrome:

- Open Settings
- Click “Show Advanced Settings”
- Scroll to Privacy and click “Clear Browsing Data...”
- Select the Browsing Data you would like to delete and click “Clear Browsing Data”



2. Working with Confidential Information

The CSCMS Database information is bound by the Health Insurance Portability and Accountability Act (HIPAA) and other personally identifiable information (PII) which must be protected. The NASW Code of Ethics includes:

Social workers should protect the confidentiality of clients' written and electronic records and other sensitive information. Social workers should take reasonable steps to ensure that clients' records are stored in a secure location and that clients' records are not available to others who are not authorized to have access. (*Ethical Standards, 1.07 Privacy and Confidentiality*)

It is critical to remember that you are working with confidential information at all times. The loss and misuse of this information can lead to Identity Theft or other negative consequences, and could harm the very people we are trying to help. Please be careful.

In order to protect sensitive, confidential data, always log out of CSCMS, or lock your computer if you walk away. Do not share your password with anyone. Do not send documents to shared printers, scanners, flash/thumb drives, etc. And only access CSCMS over secure web connections.

This is the data identity thieves work tirelessly to steal.

Please, be careful! People depend on us for their safety.

3. Getting Started

3.1 How Things Work

The goal of the *LIRS Training Manual* is to present the CSCMS database in a manner that is to the point and easy to use. These tools are explained below:



NOTE: CSCMS times-out when inactive. It may appear to be working but the functions will be incorrect until the user logs back in. To prevent this and protect sensitive data, CSCMS users should LOG-OUT of CSCMS when leaving their computer even for a short time. Locking the computer—vs. logging out—will protect the data but, a time-out can still occur and shut down the functions (*Fig. Dashboard Logout*).

Fig. Login Screen

Lutheran Immigration and Refugee Service Children's Services Case Management System

Username:

Password:

[Forgot Password?](#)

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Fig. Dashboard Logout



3.2 How Computer Commands Look

Computer commands are words and actions that users use constantly. In this manual, **action words** are **bolded** and *things acted on* are *italicized*. Examples: **Click** the *Stop Button*, **Enter** *Data*, **Insert** *Table*, **Delete** *Record*.



NOTE: Capitalizing first letters is used here only as examples and for clarity. In the manual words in mid-sentence will be in lowercase letters.

3.3 Other Helpful Tools:

Control Click on the Table of Contents' titles if you would like to be taken to chapter, subchapter, paragraph and figure levels.

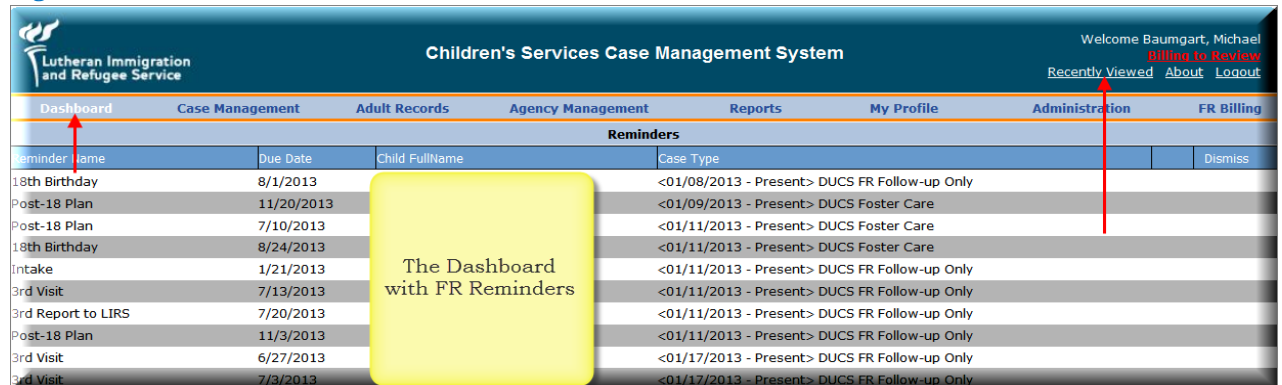
Screen shots use pointer arrows and 'balloon' text boxes to show what a task *usually* looks like and what to look for and/or do. For easy screens, instructions will be in the 'balloon' text box.



TIPS / NOTES icon: Tips are short cuts, ideas, and helpful information to help make things easier. Notes are the how, the why, and the warning messages to explain why it is done that way and how you fix it if something goes wrong.

4. Dashboard

Fig. Dashboard with FR Reminders



| Reminder Name | Due Date | Child FullName | Case Type | Dismiss |
|--------------------|------------|----------------|---|---------|
| 18th Birthday | 8/1/2013 | | <01/08/2013 - Present> DUCS FR Follow-up Only | |
| Post-18 Plan | 11/20/2013 | | <01/09/2013 - Present> DUCS Foster Care | |
| Post-18 Plan | 7/10/2013 | | <01/11/2013 - Present> DUCS Foster Care | |
| 18th Birthday | 8/24/2013 | | <01/11/2013 - Present> DUCS Foster Care | |
| Intake | 1/21/2013 | | <01/11/2013 - Present> DUCS FR Follow-up Only | |
| 3rd Visit | 7/13/2013 | | <01/11/2013 - Present> DUCS FR Follow-up Only | |
| 3rd Report to LIRS | 7/20/2013 | | <01/11/2013 - Present> DUCS FR Follow-up Only | |
| Post-18 Plan | 11/3/2013 | | <01/11/2013 - Present> DUCS FR Follow-up Only | |
| 3rd Visit | 6/27/2013 | | <01/17/2013 - Present> DUCS FR Follow-up Only | |
| 3rd Visit | 7/3/2013 | | <01/17/2013 - Present> DUCS FR Follow-up Only | |

Fig. Dashboard Ribbon



4.1 Dashboard

The Dashboard *Fig. Dashboard* is the default site of the Children's Services Case Management System database (CSCMS) *Fig. Dashboard Ribbon*.

- ❖ Here users can:
 - Enter the database by clicking one of the titles in the Dashboard Ribbon (e.g. Case Management). Not all titles shown are available to all users.
 - View their reminders by checking the Show All Reminders check box located in the lower left corner
 - See recently viewed cases by clicking on the Recently Viewed link in the upper right corner
 - Logout by clicking the Logout link in the upper right corner

5. Case Management

Fig. Case Management Tab Page

Children's Services Case Management System

Welcome Baumgart, Michael
[Billing to Review](#)
[Recently Viewed](#) [About](#) [Logout](#)

[Dashboard](#) [Case Management](#) [Adult Records](#) [Agency Management](#) [Reports](#) [My Profile](#) [Administration](#) [FR Billing](#)

Child Search

Case #: -

☐ Open Cases Only ☐ My Cases Only

Local Agency:

First Name: Alien #:

Middle Name:

Last Name:

Case Type:

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5.1 Updating CSCMS in Case Management

Case Management (*Fig. Case Management*), is where the majority of CSCMS case records are created, accessed and updated.

5.2 Minor Search

- ❖ Enter the Case Management Section to initiate a Minor Case Search to:
 - Retrieve a specific case or multiple cases by **entering** one or more of the case details listed below in their appropriate *text box*:
 - Alien Number—retrieves a single person
 - Person's Name—retrieves that person or persons with that name
 - Program Agency—retrieves cases from the local agency
 - Case Type(s)—retrieves one or multiple cases from the search parameters entered
 - To limit the Minor Search, check one of these boxes

- Open Cases Only—retrieves only the open cases from the search parameters entered
- My Cases Only—retrieves only the user's cases

➤ **Click Search**

Fig. To Enter the Case Management Section

Children's Services Case Management System

Welcome Baumgart, Michael
[Recently Viewed](#) [About](#) [Logout](#)

Dashboard Case Management Adult Records Agency Management Reports My Profile Administration FR Billing

Minor Search

Case #: -

☐ Open Cases Only ☐ My Cases Only

Program Agency:

First Name: Princess Alien #:

Middle Name: Snow

Last Name: White

Case Type:

| Full Name | DOB | Alien # | Case | Dates |
|--------------------------------------|------------|-------------|---------------------------------|-------------------------|
| White, Princess Snow | 10/03/2013 | 111-222-333 | URM FC Overseas | 11/06/2000 - 01/01/2005 |

show page: 1 Records Per Page: 25

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TIP: Typing part of a name or number in the text box retrieves data only in the alphabetical or numerical range typed. The more data entered the shorter the retrieved list will be to manually search. For example, type in 'B' and the search retrieves only names starting with 'B'; type in 'Mi' and the search retrieves only names starting with 'Mi'. For numbers, Type in '1' and the search retrieves only numbers starting with '1'; type in '327' and the search retrieves only numbers starting with '327'.

5.3 Open a Minor's Case Record

- ❖ To open a Minor's Case Record to view and/or update a file:

- In the Full Name column **click** the person's blue hyperlinked name. This will open the Details tab for that minor, or
- In the Case column, **click** the person's blue hyperlinked case type. This will open the Cases tab for that minor
- Once you click into the minor's case record, access their case information by clicking on the appropriate tab across the top. Tab options include: Details, Cases, Notes, People, Reminders and Documents (see screen shot below, *Fig. Case Management Section Default Page*)

5.4 Add a Minor (LIRS National Headquarters Only)

Fig. Add New Minor

- ❖ **Click** *Add Minor* button to open the New Minor window
 - **Enter** the minor's data into the *text boxes*
 - **Click** the *Save button* when finished

5.1 Case Management Section

The Case Management Section (*Fig. Case Management Section Tabs Ribbon*) is where users access and update the majority of CSCMS case records using the Section tabs—Details, Cases, Notes, People, Reminders, and Documents.

Fig. Case Management Section Tabs Ribbon



NOTE: Once a case is opened in the Case Management Section no other case can be opened in any tab until the first case is finished/closed. There is no 'exit' button in this section; to exit this section, click Case Management in the Dashboard ribbon. A new case can then be opened or another title clicked as needed.

5.1.1 Details Tab

Fig. Case Management Cases Default Page

The screenshot displays the 'Children's Services Case Management System' interface. At the top, a header bar includes the Lutheran Immigration and Refugee Service logo, the system title, and a user welcome message for Michael Baumgart. Below the header is a navigation menu with tabs: Dashboard, Case Management (highlighted), Adult Records, Agency Management, Reports, My Profile, Administration, and FR Billing. The main content area shows case details for 'Princess White'. The 'Child Name' field is populated with 'White, Princess' and the 'Case Type' is '<11/06/2000 - 01/01/2005> URM FC Overseas'. The 'Affiliate Agency' is 'Lutheran Community Services Northwest - Seattle'. Below this, a sub-menu has tabs: Details (highlighted), Cases, Notes, People, Placements, Reminders, and Documents. The 'Details' tab contains various fields for personal information: First Name (Princess), Middle Name (Snow), Last Name (White), AKA (empty), DOB (10/3/2013), DOB Estimated (radio buttons for Yes/No, No selected), Redetermined (radio buttons for Yes/No, No selected), Gender (radio buttons for Male/Female, Female selected), Marital Status (Single), Pregnant (radio buttons for Yes/No, No selected), Birth Country (Switzerland), Hab Residence Country (Switzerland), Citizenship (Switzerland), Country of residence prior to US (Ba), Ethnicity (Germanic), Religion (Christian), Case # (empty), Alien Number (111-222-333), and Member of group (empty). A red callout bubble points to the 'National Headquarters Function ONLY' text. Two yellow tip boxes are present: one explaining that the name 'Princess White' is used in the upper left corner and case tabs, and another explaining that the dashboard title is 'WHITE' and the current tab is 'Details'. At the bottom, there are buttons for Save, Add Language, Group Management, Cancel, and Remove Child. A footer bar shows copyright information: © 2010 Copyright - CSCMS Version 2.3.0.

Children's Services Case Management System

Welcome Baumgart, Michael

[Billing to Review](#)

[Last Search Results](#) [Recently Viewed](#)

Dashboard Case Management Adult Records Agency Management Reports My Profile Administration FR Billing

Child Name: White, Princess

Case Type: <11/06/2000 - 01/01/2005> URM FC Overseas

Affiliate Agency: Lutheran Community Services Northwest - Seattle

Agency Caseworker:

Details Cases Notes People Placements Reminders Documents

First Name: Princess

Middle Name: Snow

Last Name: White

AKA:

DOB: 10/3/2013

DOB Estimated: ☐ Yes ☒ No

Redetermined: ☐ Yes ☒ No

Gender: ☐ Male ☒ Female

Marital Status: Single

Pregnant: ☐ Yes ☒ No

Birth Country: Switzerland

Hab Residence Country: Switzerland

Citizenship: Switzerland

Country of residence prior to US: Ba

Ethnicity: Germanic

Religion: Christian

Case #:

Alien Number: 111-222-333

Member of group:

Save Add Language Group Management Cancel Remove Child

Created by: urm_conversion Created date: 9/21/2007 6:31:45 PM Updated by: mbaumgart Updated date: 10/3/2013 2:48:39 PM

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TIP: The Name of an open file, here Princess White, displays in the upper left corner under the Case Management title and follows the case in each tab that is opened.

TIP: The Dashboard Title you are currently working in has WHITE text (see Case Management title), the Tab you are currently working in has RED text (see Details tab).

National Headquarters Function ONLY

Above is the open auto populated Details page. The data here is basic personal information and can easily be updated by manually entering data into the text boxes or click on a drop-down arrow and click an entry on a list.



NOTE: These fields auto-populate from data entered at the National level and will rarely need to be updated.

The screenshot displays the 'Case Management' section of the URM Conversion application. The main form includes fields for 'Child Name' (White, Princess), 'Case Type' (<11/06/2000 - 01/01/200...), 'First Name' (Princess), and 'DOB'. Below these are tabs for 'Details', 'Cases', 'Notes', and 'People'. A yellow callout box provides instructions: 'To update the languages a person speaks click these buttons in order. 1 opens the language pop-up; 2 opens the list--click a language to populate the text box; 3 click to add it to the case record.' Red arrows indicate the sequence: Arrow 1 points to the 'Add Language' button at the bottom left. Arrow 2 points to a dropdown arrow next to the 'Native:' field. Arrow 3 points to the 'Add Language' button in the modal window. The modal window shows a scrollable list of languages starting with 'Albanian, Arvanitika', 'Albanian, Gheg', 'Albanian, Tosk', etc., and buttons for 'Add Language' and 'Cancel'.

- 

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5.1.2 Cases Tab

Fig. Case Management FR Cases Page

Dashboard Case Management Adult Records Agency Management Reports My Profile Administration FR Billing

Child Name:
Case Type: <07/12/2010 - Present> DUCS FR Home Study
Affiliate Agency: PLLC
Agency Caseworker:

Details Cases Notes People Reminders Documents Indicator
Save Case New Case Cancel Delete Case

Date of Apprehension: 5/24/2010 Place of Apprehension:
Referral date: 7/12/2010
Referral Source: ORR/DUCS
Start Date: 7/12/2010
Ref. to Program Date:
Date Agency Secured: 8/11/2010
Release From ORR Shelter: 9/20/2010
End Date:
Case Closure Reason:
Final Status Date:
Phase:

Agency History

| | Program Agency | Program Start Date | Program End Date | Program End Reason |
|--|----------------|--------------------|------------------|--------------------|
| | PLL | 08/11/2010 | | |

Agency Caseworker

| | Caseworker | Start Date | End Date | Phone Number | Email Address | Supervisor | Caseworker End Reason |
|--|------------|------------|----------|--------------|---------------|------------|-----------------------|
|--|------------|------------|----------|--------------|---------------|------------|-----------------------|

The Case Management Cases page is where case data is documented. This includes important dates in the life of a case, and also personal and clinical assessment information regarding clients. Much of this section is populated by referral data entered at the National LIRS level.



NOTE: In this section you will see **Yellow +** and **Red X** icons on the left side of a row. A **Yellow +** signals new information can be added to this record. The **Yellow +** will vanish if no further additions are allowed. A **Red X** is the 'Delete This Record' button. If clicked, a pop-up message asks if you are sure you want to delete the item.

Fig. Case Management FR Cases Page w/ Phase Options

Dashboard Case Management Adult Records Agency Management Reports My Profile

Child Name:
 Case Type: <04/26/2012 - 04/27/2012> DUCS FR Follow-up Post Home Study

Affiliate Agency:
 Agency Caseworker:

Details Cases Notes People Placements Reminders Documents

Save Case New Case Cancel Delete Case

Date of Apprehension:
 Referral date:
 Start Date:
 Ref. to Program Date:
 Release From ORR Shelter:
 End Date:
 Final Status Date:
 Phase: Closed

14 Day Visit/Report Pending
 2nd Visit/Report Pending
 3rd Visit/Report Pending
 Annual Visit/Report Pending
 Closed
 Dormant
 FP Appointment Pending
 Home Study Interviews in Progress
 Home Study Report Submitted/Pending ORR Decision

Place of Apprehension:
 Referral Source:
 Date Agency Secured:
 Case Closed: Not Assured- Referral Accepted

Agency History

| + | Program Agency | Program Start Date | Program End Date |
|---|----------------|--------------------|------------------|
| | | | |

Agency Caseworker

| + | Case Worker | Start Date | End Date | Phone Number | Email Address |
|---|-------------|------------|----------|--------------|---------------|
| | | | | | |

❖ Partner users will update:

- Phases of a case (Fig. Case Management FR Cases Page w/ Phase Options)
- Minor and Sponsor Risks
 - Referral or Additional Risk
 - Date Identified
- Intensity of Intervention
- Adding Other Caregivers if Sponsor ends
 - If a minor moves and/or changes caregivers, the Partner will complete the SIR form and email to their Program Specialist and copy the CSCMS Help Desk (cscmsit@lirs.org).

- Upon receipt of the SIR form indicating a change of address and/or caregiver, the Help Desk will update the address and/or caregiver in CSCMS
- NOTE: If minor is changing caregiver, the partner needs to give the previous sponsor/caregiver and “End Date” and “Sponsor End Reason” by opening the Sponsor Dialogue Box (from the Cases Tab) using the notepad icon.

The image shows a screenshot of the 'Sponsors' dialog box in the CSCMS system. The dialog box has a title bar 'Sponsors' and a list of sponsors. Below the list are two icons: a notepad icon (indicated by a red arrow) and a delete icon (a red X). The bottom section of the dialog box is a form with the following fields:

- Start Date: * 10/28/2015
- End Date: [empty field]
- Sponsor End Reason: [empty field with a dropdown arrow]

Below the form fields is a status bar that reads: 'Created by: sremulla Created date: 10/28/2015 1:52:16 PM Updated by: sremulla Updated date: 10/28/2015 1:52:16'. At the bottom of the dialog box are three buttons: 'Save', 'Close', and 'Delete'. A red arrow points to the dropdown arrow of the 'Sponsor End Reason' field.

➤ Changes in Agency Caseworker

➤ Case Closure Information

- End Date
- Closure Reason
- Indicators/Outcomes

❖ Add a New Case **(LIRS National Headquarters Only)**

Fig. Case Management Cases Add Case

The screenshot shows the 'Case Management' interface. At the top, there are tabs: Dashboard, Case Management (selected), Adult Records, Agency Management, and Reports. Below the tabs, the 'Child Name' is 'White, Princess' and the 'Case Type' is '11/06/2000 - 01/01/2005> URM FC Overseas'. The 'Affiliate Agency' is 'Agency Caseworker'. Below this, there are tabs: Details, Cases (selected), Notes, People, Placements, Reminders, and Documents. There are four buttons: Save Case, New Case, Cancel, and Delete Case. A yellow callout bubble points to the 'New Case' button and the 'Case Type' dropdown, containing the text: 'To add a new case **click** New Case, **click** the text box arrow to open the 'types of list', **click** the case type needed and **enter** a start date.' Below the buttons, there are fields for 'Referral Source', 'Referral date', 'Start Date' (with a calendar icon), 'Ref. to P', 'Release', 'Case C', 'Final St', 'Reclass', and 'State Id'. A 'Case Add' window is open, showing a list of case types: Fingerprinting, DUCS FR Home Study, DUCS FR Follow-up Only, DUCS Foster Care, URM FC Trafficking, URM FC Overseas, URM FC Family Breakdown, URM FC Cuban-Haitian, URM FC Asylee, URM FC Age Redetermination, URM FC SJS, DUCS FR Follow-up Post Home Study, DUCS Transitional Foster Care, and DUCS Transitional Group Home. The 'Type' field is empty, and the 'StartDate' field has a calendar icon. A red arrow points to the 'StartDate' field. Below the list, there is a note: 'Note: Usually the start date is the referral date.' and two buttons: Add Case and Cancel.

❖ To Add a new case **click** *New Case* button:

➤ **Click** *Type text box* to open list

- **Click** *case type* needed from list
- **Enter** a *Start Date* (usually the referral date)
- **Click** Add Case

❖ Add an Agency (for case transfers) **(LIRS National Headquarters Only)**

- ❖ To add/change an Agency:
 - **Click** the *yellow +*
 - **Choose** an agency from the *drop-down list*
 - **Add** Program Start Date
 - if this is a second agency, **click** Yes in the End Date pop-up box, BEFORE adding an agency
 - **Click** *Save*.

Fig. Case Management Cases Add Caseworker

Dashboard **Case Management** **Adult Records** **Agency Management** **Reports** **My Profile**

Child Name:
 Case Type: <04/26/2012 - 04/27/2012> DUCS FR Follow-up Post Home Study
 Affiliate Agency:
 Agency Caseworker:

Details **Cases** **Notes** **People** **Placements** **Reminders** **Documents**

Save Case **New Case** **Cancel** **Delete Case**

Date of Apprehension:
 Referral date:
 Start Date: 4/26/2012
 Ref. to Program Date:
 Release From ORR Shelter:
 End Date: 4/27/2012
 Final Status Date:
 Phase: Closed

Place of Apprehension:
 Referral Source:
 Date Agency Secured:
 Case Closure Reason: Not Assured- Referral Acc

Agency History

Agency Caseworker

Minor Risks

Sponsor Risks

Other Caregiver Risks

Add Caseworker

Caseworker: *
 Supervisor: *
 Start Date: 8/11/2010
 End Date:
 Caseworker End Reason:
 Save **Cancel**

- ❖ To add a Caseworker
 - **Click** the *yellow +* (plus sign)

- In Pop-up
 - **Enter** data and date in the 5 *text boxes*
 - **Click** *Save*
- ❖ If ending/changing a Caseworker, on the initial caseworker's information
 - **Click** the Edit option
 - **Enter** the End Date and End Reason
 - Click *Save*

Fig. Case Management Cases Add Minor Risk

The screenshot displays the 'Case Management Cases Add Minor Risk' interface. At the top, there are tabs for Dashboard, Case Management, Adult Records, Agency Management, Reports, and My Profile. Below these, the 'Child Name' and 'Case Type' are displayed. The 'Case Type' dropdown is set to '<04/26/2012 - 04/27/2012> DUCS FR Follow-up Post Home Study'. The 'Affiliate Agency' and 'Agency Caseworker' fields are also present. The main form area contains various input fields for case details, including dates and a phase dropdown. A yellow callout box highlights the 'Add Minor Risk' button, instructing the user to click the yellow plus sign, choose from drop-down lists, enter dates, and click OK. A red callout box points to the 'Delete Case' button, noting it is for National Headquarters Function ONLY. The bottom section of the interface includes tables for Agency History, Agency Caseworker, Minor Risks, Sponsor Risks, Other Caregiver Risks, and Intensity of Intervention.

- ❖ To add a Minor Risks:
 - **Click** the *yellow +* (plus sign)

- In Pop-up
 - **Choose** Risk Type (Referral or Additional) and Risk from *drop-down lists*
 - **Enter** date in *text boxes* (Referral risks automatically populate date)
 - **Click** *Save*
- Repeat as necessary for initial referral risk entry, and throughout life of case for additional risks identified

❖ Fig. Case Management Cases Add Sponsor Risk

❖ To add Sponsor Risk:

- **Click** yellow +
- In Pop-up

- **Choose** Risk Type (Referral or Additional) and Risk from *drop-down lists*
 - **Enter** date in *text boxes* (Referral risks automatically populate date)
 - **Click** *Save*
- Repeat as necessary for initial referral risk entry, and throughout life of case for additional risks identified

❖ Fig. Change in Caregiver

Fig. Case Management Cases Add Other Caregiver Risk

The screenshot displays the Case Management system interface. At the top, there is a navigation bar with links: Dashboard, Case Management, Adult Records, Agency Management, Reports, and My Profile. Below this, a header section contains fields for Child Name, Case Type (set to '<04/26/2012 - 04/27/2012> DUCS FR Follow-up Post Home Study'), Affiliate Agency, and Agency Caseworker. The main content area features tabs for Details, Cases, Notes, People, Placements, Reminders, and Documents. A red callout box highlights the 'Delete Case' button with the text 'National Headquarters Function ONLY'. A yellow callout box points to the 'Date' field with the text 'Click a phase type from the list to fill text box'. Another yellow callout box points to the 'Add Other Caregiver Risk' button in the 'Other Caregiver Risks' section with the text 'Click yellow +; Enter data and date in the 4 text boxes, click Save'. A modal window titled 'Add Other Caregiver Risk' is open, showing fields for 'Other Caregiver:', 'Risk Type:', 'Risk:', and 'Date Risk Identified:', with 'Save' and 'Close' buttons.

❖ To add Other Caregiver Risk:

- **Click** yellow +

- In Pop-up
 - **Enter** data and date in the 4 *text boxes*
 - **Click** *Save*
- Repeat as necessary for risk entry throughout life of case for additional risks identified

Fig. Case Management Cases Intensity of Intervention Part 1

The screenshot displays the 'Case Management' interface. At the top, there are tabs for 'Dashboard', 'Case Management', 'Adult Records', 'Agency Management', 'Reports', and 'My Profile'. Below these, there's a header section with 'Child Name:', 'Case Type:', and 'Affiliate Agency:'. The 'Case Type' dropdown is set to '<04/26/2012 - 04/27/2012> DUCS FR Follow-up Post Home Study'. Below the header, there are tabs for 'Details', 'Cases', 'Notes', 'People', 'Placements', 'Reminders', and 'Documents'. The 'Cases' tab is active, showing a 'Save Case' button and a 'New Case' button. A yellow callout box points to the 'Save Case' button, stating 'Click yellow +; enter data and date into 4 text boxes'. Another yellow callout box points to the 'Delete Case' button, stating 'National Headquarters Function ONLY'. The form contains several date fields: 'Date of Apprehension:', 'Referral date:', 'Start Date:' (set to 4/26/2012), 'Ref. to Program Date:', 'Release From ORR Shelter:', 'End Date:' (set to 4/27/2012), and 'Final Status Date:'. There is also a 'Phase:' dropdown set to 'Closed'. Below the form, there are sections for 'Agency History', 'Agency Caseworker', 'Minor Risks', 'Sponsor Risks', 'Other Caregiver Risks', and 'Intensity of Intervention'. A small window titled 'Add Intensity of Intervention' is open, showing fields for 'Intensity of Intervention:', 'Start Date:', 'End Date:', and 'Intensity Level End Reason:'. A yellow callout box points to the 'Add Intensity of Intervention' button, stating 'Click yellow +; enter data and date into 4 text boxes'.

❖ To add an Intensity of Intervention:

- **Click** the *Yellow +*
- In the Pop-up

- **Enter** the level and Start Date (*required items)
- **Click** *Save*

❖ Fig. Case Management Cases Intensity of Intervention Part 2

Children's Services Case Management System

Dashboard | Case Management | Adult Records | Agency Management | Reports | My Profile

Child Name: [] Case Type: <07/12/2010> Present> DUCS FR Home Study

Affiliate Agency: [] Agency Caseworker: []

Details | **Cases** | Notes | People | Reminders | Documents | Indicator

Save Case | New Case | Cancel | Delete Case

Date of Apprehension: 5/24/2010 Place of Apprehension: []

Referral Source: ORR/DUCS Referral date: 7/12/2010

Start Date: 7/12/2010 Date Agency Secured: 8/11/2010

Ref. to Program Date: []

Release From ORR Shelter: 9/20/2010

End Date: [] Case Closure Reason: []

Final Status Date: []

Phase: []

Agency History

| Program Agency | Program Start Date | Program End Date |
|----------------|--------------------|------------------|
| PLLC | 08/11/2010 | |

Agency Caseworker

| Caseworker | Start Date | End Date | Phone Number | Email Address |
|------------|------------|----------|--------------|---------------|
| | 08/11/2010 | | | @gmail.com |

Minor Risks

| Risk | Risk Type | Date Risk Identified |
|-----------------------|-----------|----------------------|
| Abandonment by parent | | |

Sponsor Risks

| Sponsor | Risk |
|---------|------|
| | |

Other Caregiver Risks

| Caregiver | Risk |
|-----------|------|
| | |

Intensity of Intervention

| Intensity Level | Start Date | End Date | End Reason |
|--------------------|------------|------------|--------------------|
| Level 2 - Moderate | 11/05/2013 | | |
| Level 3 - High | 11/01/2013 | 11/04/2013 | Health and Medical |

Add Intensity of Intervention

Intensity of Intervention: Level 2 - Moderate

Start Date: 11/5/2013

End Date: []

Intensity Level End Reason: []

Save Cancel

❖ To change an Intensity of Intervention level:

- First edit the most recent level by **Clicking** the *Edit* icon
 - **Enter** the End Date and End reason
 - **Click** *Save*
- Then add the new level by **Clicking** the Yellow +
- In the Pop-up
 - **Enter** the level and Start Date (*required items)

- **Click Save**

Fig. Case Management Cases Add Last ORR Placement (Shelter)

The screenshot displays the Case Management system interface. At the top, there are tabs for Dashboard, Case Management, Adult Records, Agency Management, Reports, and My Profile. Below these, the 'Child Name' and 'Case Type' fields are visible, with 'Case Type' set to '<11/06/2000 - 01/01/2005> URM FC Overseas'. The 'Affiliate Agency' is 'Lutheran' and the 'Agency Caseworker' is also 'Lutheran'. The 'Cases' tab is selected, showing a list of cases. A red arrow points to the 'Add' button (yellow plus sign) next to the 'Last ORR Placement' row. A yellow callout box with the text 'Click yellow +; Enter data and date in the 6 text boxes, click OK' points to this button. A pop-up window titled 'Add Shelter History' is open, showing fields for 'ORR Placement', 'Arrival date', 'Departure Date', 'Caseworker', 'Email Address', and 'Third Party Worker'. A red arrow points to the 'Add Shelter History' title bar of the pop-up window.

- ❖ To add/change Add Shelter History: **(LIRS National Headquarters Only)**
 - **Click** the Yellow +
 - in the Pop-up **enter** as much data as you have regarding the previous ORR Placement in the 6 *text boxes* (ORR Placement is a required field)
 - Click *OK*

Fig. Case Management Cases Add LIRS Staff

Dashboard Case Management Adult Records Agency Management Reports My Profile

Child Name:
 Case Type: <07/12/2010 - Present> DUCS FR Home Study

Details Cases Notes People Placements Reminders Documents

Save Case New Case Cancel Delete Case

DO NOT USE 'Delete Case' National level LIRS use ONLY

Date of Apprehension: 5/24/2010 Place of Apprehension:
 Referral date: 7/12/2010 Referral Source: ORR/DUCS
 Start Date: 7/12/2010
 Ref. to Program Date:
 Date Agency Secured: 8/11/2010
 Release From ORR Shelter: 9/20/2010
 End Date:
 Case Closure Reason:
 Final Status Date:
 Phase:

Agency History

| Program Agency |
|------------------------|
| Grace Social Work PLLC |

LIRS Staff Assigned to Case

| LIRS Staff | Active |
|------------|--------|
| + | No |
| | No |
| | No |
| | Yes |
| | No |
| | No |
| | No |

Click yellow +; Enter data and date in the 5 text boxes, click Save

Add User to Case - Windows Internet Explorer

http://wd-t-cscms.partners-intl.net/Main/Case/CaseUsers.aspx?caseID=15674

Add LIRS Staff

LIRS Staff: *
 Active: * ☒
 Start Date: *
 End Date:
 Staff End Reason:
 Notes:
 Save Cancel

❖ To add/change LIRS Staff: (LIRS National Headquarters Only)

➤ **Click** the Yellow +

- in the Pop-up **click** data in the LIRS Staff drop-down list
- **Check** Active box
- **Enter** data in the Start Date text box
- **Enter** data in other text boxes if known
- **Click** Save

5.1.3 Notes

The Notes tab is where messages and case notes are created and stored. Notes can be sorted by: Service Date, Author, Note Type, and Entry Date by clicking on the column title.

Fig. Case Management Notes

Case Management Notes

Dashboard Case Management Adult Records Agency Management

Child Name: Bauer, Jack Affiliate Agency:
Case Type: <02/25/2014 - Present> DUCS FR Follow-up Only Agency Caseworker:

Details Cases **Notes** People Reminders Documents Indicator Billing

Case Notes

Add New Case Note Case Notes Search/Report

Show page: 1 (Total Records: 1)

| Service Date | Author | Note Type | Note |
|--------------|--------|---|---|
| | | Communication with Minor/Family/Significant Relations | <p>Twenty-four hour call to sponsor to confirm Jack's arrival to home. Mrs. Bauer stated Jack arrived. The shelter work accompanying Jack provided his documents and medication for 30 days. Mrs. Bauer has already contacted the school, and has an appointment to enroll Jack at Clover.</p> <p>This worker asked to speak with Jack, who picked up the phone and said he remembered some meeting this worker. Then he passed the phone back to his mother.</p> <p>Mrs. Bauer and this worker agreed to meet on 3/15/14 at 4:00pm at the family home and continue time.</p> <p>Jack and his mother identified Spanish as their primary language. According to Mrs. Bauer, they will continue Jack's medication after 30 days.</p> |

Show page: 1 (Total Records: 1)

The notes tab is where messages and case notes are created and stored. Notes can be sorted by: Service Date, Author, Note Type, and Entry Date by clicking on the column title. This is an example of a twenty-four hour call note.

Fig. Case Management Notes Add Note

Child Name:

Bauer, Jack

Affiliate Agency:

Case Type:

<02/25/2014 - Present> DUCS FR Follow-up Only

Agency Caseworker:

Details

Cases

Notes

People

Reminders

Case Notes

Case Notes Search/Report

Show page: 1 (Total Records: 6)

| Service Date | Author | Note Type | |
|-----------------------|-------------------------|---|--|
| 3/31/2014 12:58:00 PM | cwalton Draft | Administrative | |
| 3/24/2014 9:46:00 AM | cwalton | Communication with Shelter | Checking to ensure that this message sav |
| 3/24/2014 9:37:23 AM | cwalton | Communication with Minor/Family/Significant Relations | Just checking to see if I can save this note |
| 3/21/2014 1:23:03 PM | dbtest | Communication with Minor/Family/Significant Relations | See Writing Casenote Guidance Handout for LIRS Best Practice |
| 3/14/2014 11:48:00 AM | cwalton | Communication with Minor/Family/Significant Relations | See Writing Case Note Guidance for LIRS Best Practice information. |
| | | | Twenty-four hour call to sponsor to confirm up. The shelter work accompanying Jack p Mrs. Bauer has already contacted the scho |
| 3/6/2014 12:07:34 PM | dbrown | Communication with Minor/Family/Significant Relations | This worker asked to speak with Jack, who meeting this worker. Then he passed the p Mrs. Bauer and this worker agreed to mee time. Jack and his mother identified Spanish as t continue Jack's medication after 30 days. |

Show page: 1 (Total Records: 6)

Add New Case Note

Autosave content every 600 seconds: 542

Service Date: * 4/1/2014 9:25 AM

Author: cwalton

Note Type: * Administrative

Note: *

ABC

B

I

U

A

Please refer to Writing Casenote Guidance Handout for LIRS BEST PRACTICE!

Hide Note:

Created by: cwalton

Created date: 4/1/2014 9:25:10 AM

Updated by: cwalton

Updated date: 4/1/2014 9:25:10 AM

Note last saved as draft on 01 Apr 2014 09:25:10:747

Save

Save as Draft

Cancel

© 2010 Copyright - CSCMS Version 2.3.3

- ❖ To Add a New Case Note:
 - **Click** Add New Case Note *button*
 - **Enter data** in Service Date if needed. CSCMS automatically populates current date, if entering older notes, please backdate to the accurate service date.
 - Choose Note Type
 - **Type** new note in *Note: text box*
 - **Click** Save, Save Draft, or Delete *button*
 - *Save* will permanently save the Note in CSCMS. No further edits are allowed
 - *Save Draft* will save the Note so the user can return later to update or edit the information.
 - Spellcheck will occur automatically, or CSCMS will require the user to use Spellcheck prior to saving
 - To return to page 1 of Notes, **click** *Cancel button*

Fig. Case Management Case Notes Search/Reports

Dashboard Case Management Adult Records Agency Management Reports My Profile Administration

Child Name: Case Type: <07/12/2010 - Present> DUCS FR Home Study Affiliate Agency: Work PLLC Agency Caseworker:

Details Cases **Notes** People Placements Reminders Documents Indicator Billing

Case Notes Search / Report

Service Start Date: Service End Date: Author: All Note Type: All Note Text:

Enter parameters to search for a specific note/report, **click Display**. This will produce a report of notes.

Display Print Clear

show page: 1 2 3 4 5 6 7 8 9 10 (Total Records: 226) Records Per Page: 25

| Service Date | Author | Note Type | Note | Entry Date |
|--------------|--------|-----------|---|------------|
| | | | <p>From: Sent: Thursday, June 13, 2013 2:42 PM To: Subject: RE: siblings May reports</p> <p>Hi</p> <p>Thanks for sending these along. I realize that this is a fairly straightforward case without a lot of updates, however, reports, including monthly contacts, should include more information. If nothing new is going on in the case, indicate how that visit/phone call was different from previous ones. Some specific notes/questions I had regarding these particular contacts are listed below.</p> <p>Please give more information when submitting monthly contacts. Include</p> | |

- ❖ To Search for a specific note/report:
 - **Click** Case Search Notes/Report button
 - On next page, **Enter** note/report parameters in *text boxes*
 - **Click** Display button
 - To return to page 1 of Notes, **click** *Clear button*

5.1.5 Reminders

Fig. Case Management Cases Reminders Page

Reminders are activities or events in the life of a case that are important for the caseworker to prepare for or complete (e.g. visits, reports, 18th birthdays). Upcoming reminders will show on the Dashboard.

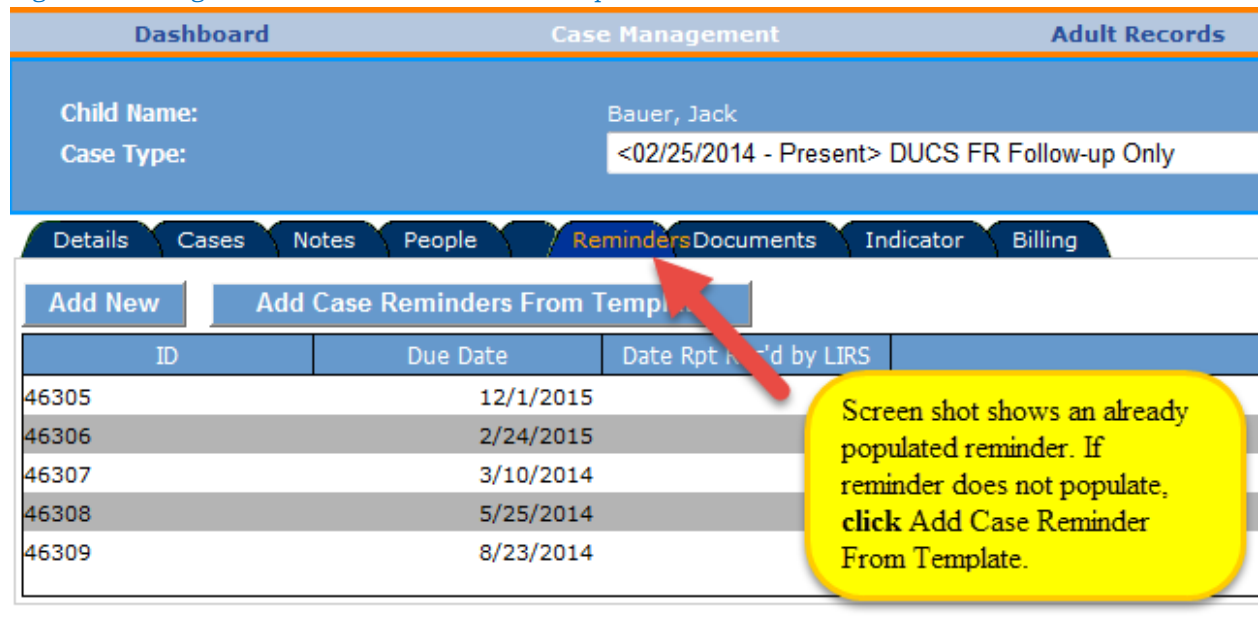
The screenshot shows the 'Case Management' tab selected. The 'Child Name' field is empty, and the 'Case Type' is '<07/12/2010 - Present> DUCS FR Home Study'. The 'Reminders' tab is active, showing a table of reminders. Red arrows point from the callout box to the 'Reminders' tab and the 'Add Case Reminders From Template' button. Another red arrow points from the callout box to the '18th Birthday' reminder in the table.

| ID | Due Date | Date Rpt Rec'd by LIRS | Reminder Name | Date Submt'd to ORR | Comment | Date of Visit | |
|-------|-----------|------------------------|---------------|---------------------|---------|---------------|----------------------|
| 32675 | 1/22/2017 | | 18th Birthday | | | | Edit |
| 32676 | | 9/8/2010 | SA REPORT | 9/9/2010 | | 9/9/2010 | Edit |
| 33263 | | | Annual Visit | | | 11/5/2011 | Edit |
| 33264 | | | Annual Visit | | | 9/22/2012 | Edit |
| 33265 | 9/19/2013 | | Annual Visit | | | | Edit |

The work performed by case managers is detailed, specific and time critical for each minor regarding their legal and physical well-being. For example, a minor's 18th birthday changes their legal status from minor to adult...a critical date for them and one that case workers must be prepared for.

To assist you, Reminders are pop-up case notes that are automatically entered, or you can set to indicate important case activities or event items that should be completed by and/or on specific dates (e.g. a minor's 18th birthday, upcoming visits and reports).

Fig. Case Management Cases Reminder from Template



Dashboard **Case Management** **Adult Records**

Child Name: Bauer, Jack
Case Type: <02/25/2014 - Present> DUCS FR Follow-up Only

Details Cases Notes People **Reminders** Documents Indicator Billing

Add New Add Case Reminders From Template

| ID | Due Date | Date Rpt Rcv'd by LIRS |
|-------|-----------|------------------------|
| 46305 | 12/1/2015 | |
| 46306 | 2/24/2015 | |
| 46307 | 3/10/2014 | |
| 46308 | 5/25/2014 | |
| 46309 | 8/23/2014 | |

Screen shot shows an already populated reminder. If reminder does not populate, **click** Add Case Reminder From Template.

Adding Case Reminders from a Template will populate a predefined series of Reminders based on the release date of the minor and child's birthdate. If not automatically populated on a new case, it should be added when the user first receives the case in CSCMS.

❖ To add new Reminders from Template

- **Click** the Add Case Reminders from Template button

The Reminders will automatically populate on the screen. Upcoming Reminders will also appear on the user's Dashboard.

Fig. Case Management Cases Add New Reminder

To add a new reminder, **click** the **Add New** button, and **enter data** in the Pop-up screen's 9 text boxes; **click Save Button**; to return to page 1 of Notes, **click Close button**

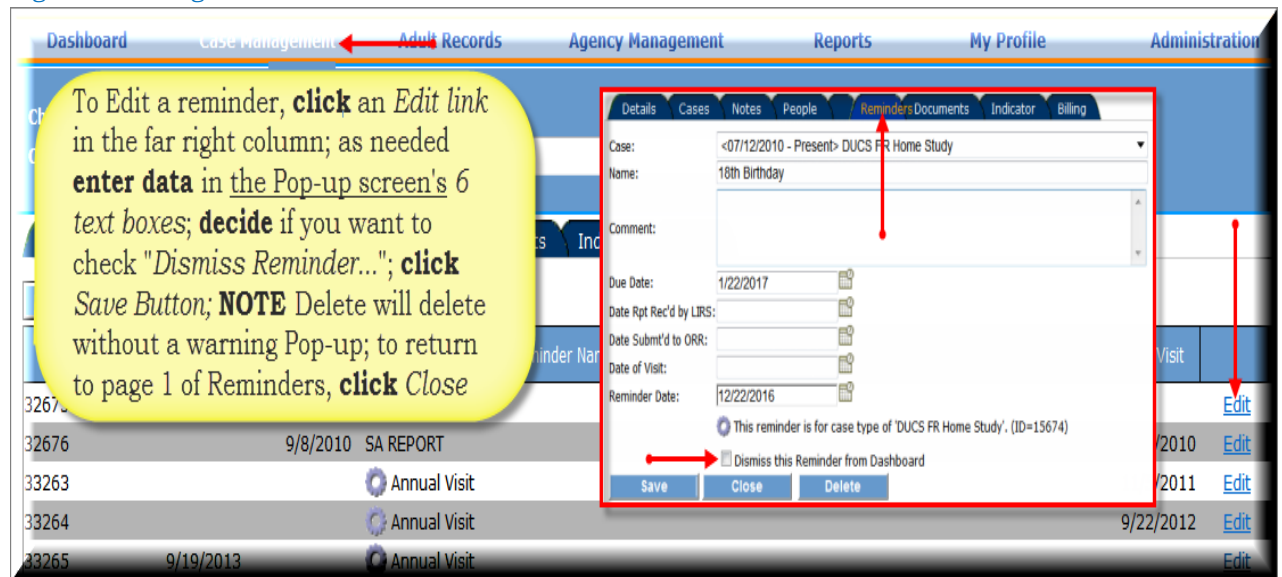
| ID | Due Date | Date Rpt Rec'd by LIRS | Reminder Name |
|-------|-----------|------------------------|---------------|
| 32675 | 1/22/2017 | | 18th Birthday |
| 32676 | | 9/8/2010 | SA REPORT |
| 33263 | | | Annual Visit |
| 33264 | | | Annual Visit |
| 33265 | 9/19/2013 | | Annual Visit |

The pop-up form includes fields for: Child Name, Case Type, Case Name, Comment, Due Date, Date Rpt Rec'd by LIRS, Date Subm'd to ORR, Date of Visit, Reminder Date, and Recur every day(s) until. It also has Save and Close buttons.

If desired, the user can add a custom Reminder to a case so a specific future action will appear on the Dashboard and Reminder screen.

- ❖ To add a new reminder
 - **Click** the Add New button
 - In the Pop-up, **enter data** in the necessary text boxes. The Reminder Name, Due Date, and Reminder Date (date appears on Dashboard) are required items.
 - **Click** Save
 - To return to Reminders page, **click Close button**

Fig. Case Management Cases Edit a Reminder



❖ To Edit a reminder:

- **Click** an *Edit link* in the far right column
- As needed, **enter data** in the Pop-up screen's 6 text boxes
- **Decide** if you want to **check** "Dismiss Reminder..."
- **Click** Save Button
 - NOTE Delete will delete without a warning Pop-up
- To return to page 1 of Reminders, **click** *Close button*

5.1.6 Documents

The Document section is used to add or find case document and upload them into the CSCMS data base.

Fig. Case Management Cases Documents

Documents

[Add New Document](#) [Search Document](#)

Show page: 12 (Total Records: 28)

| Name | Document Type | Note | Upload Date |
|-------------------------------------|--------------------------------------|------|-------------|
| CHW AYC 200 814 111 hs (1 of 2).doc | Referral Information | | 7/19/2010 |
| CHW AYC hs (2 of 2).doc | Referral Information | | 7/19/2010 |
| FRP pdf | Referral Information | | 7/19/2010 |
| Home Study Referral Memo .doc | Referral Information | | 7/19/2010 |
| RR AYC hs.pdf | Referral Information | | 7/19/2010 |
| HS_4113.doc | Reports | | 11/20/2010 |
| Records Check Result.doc.zip | Reports | | 11/20/2010 |
| 14dr_4113.doc | Reports | | 12/8/2010 |
| 2vr_4113.doc | Reports | | 12/8/2010 |
| 3vr_4111.doc | Reports | | 6/9/2011 |

Fig. Case Management Cases Add New Documents

Dashboard Case Management Adult Records Agency Management Reports My Profile Administration

Child Name: Case Type: <07/12/2010 - Present> DUCS FR Home Study

Affiliate Agency: Social Work PLLC

Add New Document

Document Type: Monthly Contact Summary
 Document Note:
 Document File: Browse

Document Type: Financial Documents
 Document Note:
 Document File: Browse

Document Type: Financial Documents
 Document Note:
 Document File: Browse

Document Type: Financial Documents
 Document Note:
 Document File: Browse

Document Type: Financial Documents
 Document Note:
 Document File: Browse

Document Type: Financial Documents
 Document Note:
 Document File: Browse

Save Cancel

DocumentsIndicator

Show page: 12 (Total Records)

| Document Name | Document Type | Upload Date |
|-------------------------------------|-----------------|-------------|
| CHW AYC 200 814 111 hs (1 of 2).doc | hs (1 of 2).doc | 7/19/2010 |
| CHW AYC hs (2 of 2).doc | hs (2 of 2).doc | 7/19/2010 |
| FRP pdf | pdf | 7/19/2010 |
| Home Study Referral Memo .doc | .doc | 7/19/2010 |
| RR AYC hs.pdf | hs.pdf | 7/19/2010 |
| HS_4113.doc | | 11/20/2010 |
| Records Check Result.doc.zip | | 11/20/2010 |
| 14dr_4113.doc | | 12/8/2010 |
| 2vr_4113.doc | | 12/8/2010 |
| 3vr_4111.doc | | 6/9/2011 |

❖ To Add New Document:

- **Click** the Add New Document button
- In the Pop-up
 - **Select** Document Type in the *text boxes*
 - **Enter** an *optional Document Note* for reference
 - **Click** *Browse* to search for the intended document from your computer drive
 - **Select** the *document* from your computer drive, the document will then appear in the Document file box
 - **Click** Save Button, the document will now appear in the CSCMS data base
 - To return to page 1 of Documents, **click** *Cancel button*

Fig. Case Management Cases Documents Search Document

The screenshot shows the 'Case Management' tab selected in the top navigation bar. Below it, the 'Documents' section is active, displaying a list of documents. A 'Search Documents' pop-up window is open, allowing users to filter documents by upload date and type. A yellow callout box provides instructions on how to use the search function.

Search Documents

Upload Start Date:

Upload End Date:

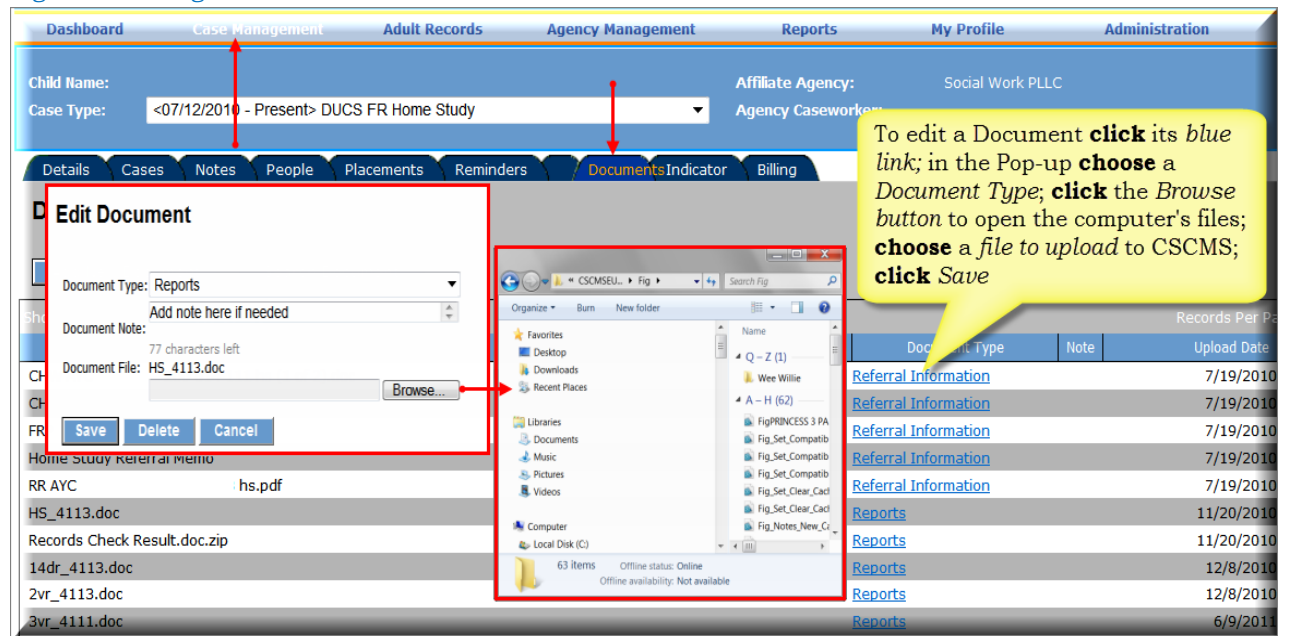
Document Type:

Document Text:

To find a document, **click** Search Document button; in the Pop-up **enter** as much data as possible in the *text boxes*; **click** Search button

- ❖ To find a document
 - **Click** Search Document button
 - In the Pop-up **enter** as much data as possible in the *text boxes*
 - **Click** Search button

Fig. Case Management Cases Documents Edit Document



❖ To Edit a Document:

➤ **Click** its *blue link*

➤ In the Pop-up

- **Choose** a Document Type
- **Click** the *Browse* button to open the computer's files
- **Choose** a *file* to upload to CSCMS
- **Click** *Save*

5.1.7 Indicators

Must be completed at the time of case closure.

Fig. Case Management Cases Indicator

The screenshot shows the 'Indicator' tab selected in the Case Management interface. The table lists various indicators for case closure, each with a 'Question' column and corresponding 'Answer', 'Utilization', and 'Reason for Non-Utilization' columns. A red arrow points to the 'Indicator' tab in the top navigation bar.

| Question | Answer | Utilization | Reason for Non-Utilization |
|--|--------|-------------|----------------------------|
| Access to mental health services? | Yes | | |
| Access to medical health services? | | | |
| Lapse in medical treatment? (ignore util. field, give reason if yes) | | | |
| Lapse in mental health treatment? (ignore util. field, give reason if yes) | | | |
| Guardianship: Sponsor (other than parent/legal guardian) obtained legal guardianship or power of attorney for the minor? (y/n) | | | |
| Family intact at time of case closure? (y/n) | | | |
| Access to school enrollment? | | | |
| Access to community-based youth programs? | | | |
| Taking medication upon release? (y/n) | | | |
| Sponsor aware of child's needs on release? (y/n) | | | |
| Child released to unfamiliar sponsor? (y/n) | | | |
| Legal Services: Minor attended all immigration court proceedings | | | |
| Legal Services: Sponsor obtained immigration attorney to represent the minor? (y/n) | | | |
| Legal Services: Minor with juvenile justice requirements provided with legal resources? (y/n) | | | |
| Safety: Sponsor is supported in maintaining a safe living environment for minor? (y/n) | | | |
| Independent Living: Minor provided with resources to meet individual independent living goals? | | | |
| Guardianship: Other Caregiver (other than parent/legal guardian) obtained legal guardianship or power of attorney for the minor? (y/n) | | | |
| Legal Services: Other Caregiver obtained immigration attorney to represent the minor? (y/n) | | | |
| Safety: Other Caregiver is supported in maintaining a safe living environment for minor? (y/n) | | | |
| Minor living with unfamiliar caregiver? | | | |

Must be completed at the time of case closure.

- To update an Indicator, select the Indicator Tab on the case.
- Click on the blue Notepad Icon within each Indicator Question, three drop downs will appear:

The screenshot shows the 'Indicator' update interface. It features a 'Question' field with the text 'Access to mental health services?'. To the right of the question field are three dropdown menus labeled 'Answer', 'Utilization', and 'Reason for Non-Utilization'. The 'Answer' dropdown is currently set to 'Yes'. Below the dropdowns are 'Update' and 'Cancel' buttons.

- Select from the drop down menus for “Answer,” “Utilization,” and “Reason for Non-Utilization” depending on the case information at the time of closure.
- Click “Update”