Lutheran Immigration and Refugee Service

CSCMS V.2.4.3

LIRS Local User Manual

November 2015

Table of Contents

These titles are live links to Chapters, Paragraph Headings, and Figures. Place the cursor on a title and **control click** the *title*.

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

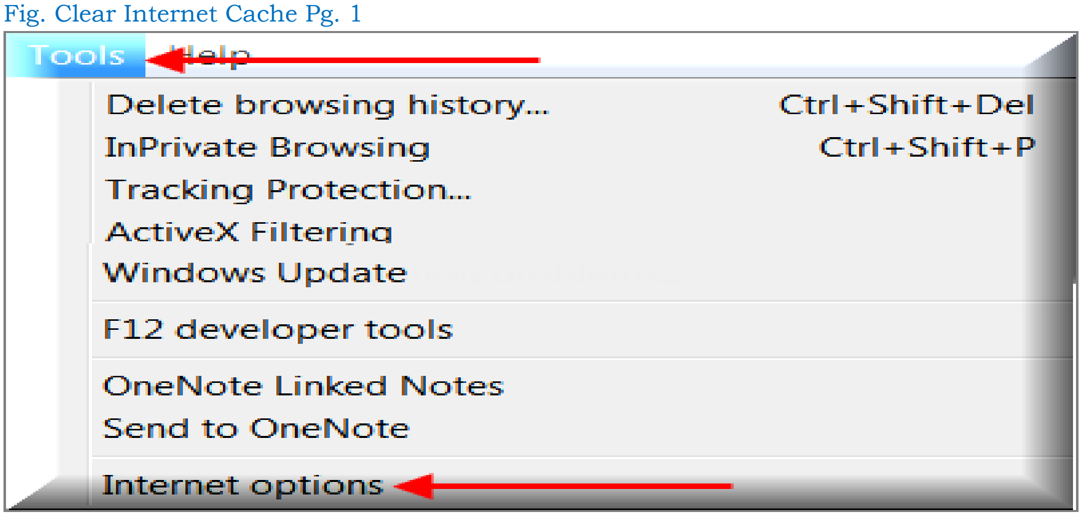
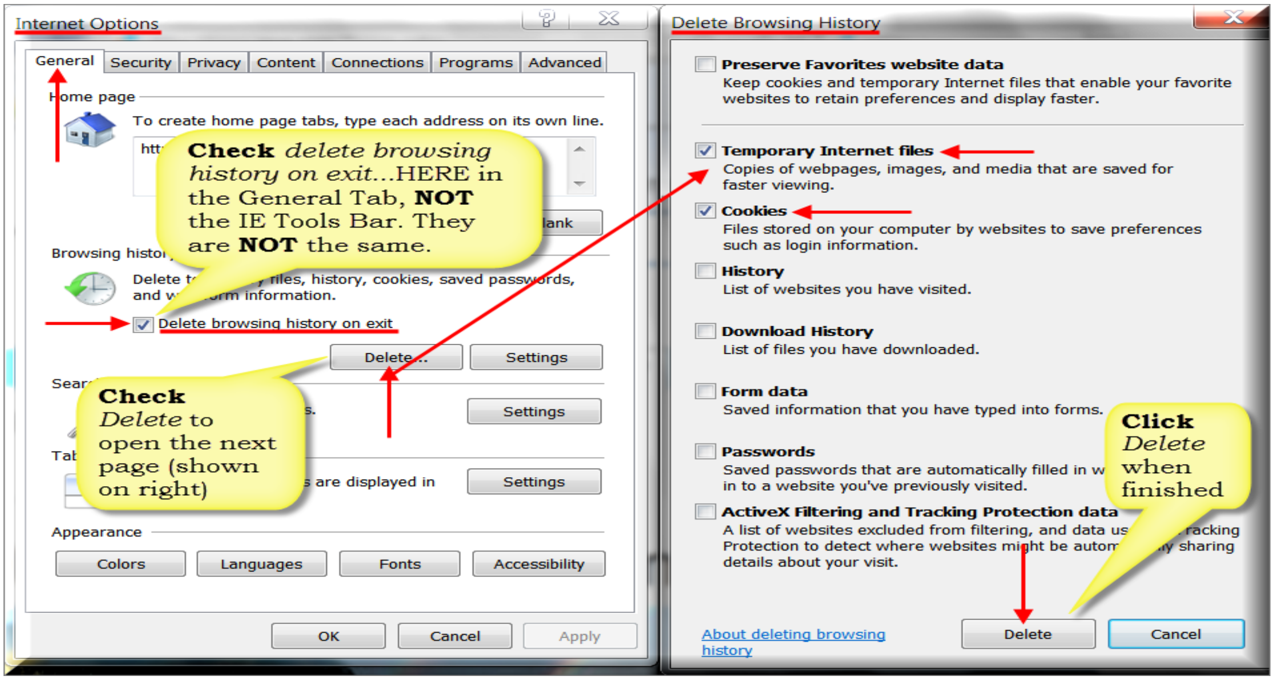


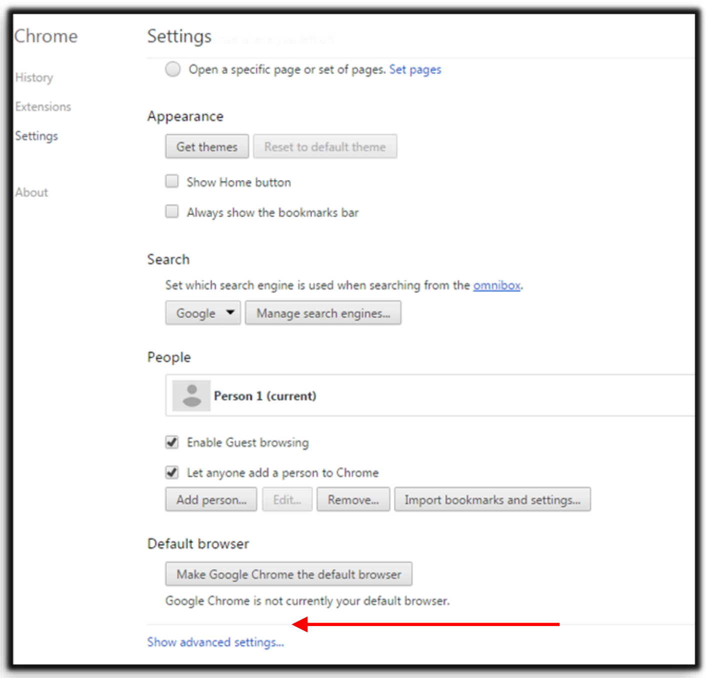
Fig. Clear Internet Cache Pg. 2



- ❖ Configure the IE Browser to auto-clear the cache
  - ➢ Open IE, **Click** *Tools*
- ❖ **Click** Internet Options, (Fig. Clear Internet Cache Pg. 1)
- ❖ **Check** <u>Delete browsing history on exit*</u> *check box*, (*Fig. Clear Internet Cache Pg. 2*)
  - ➢ **Click** Delete Button to enter set-up page (Fig. Clear Internet Cache Pg. 2)
- ❖ **Check** <u>Temporary Internet files and Cookies</u> *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 protetct 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

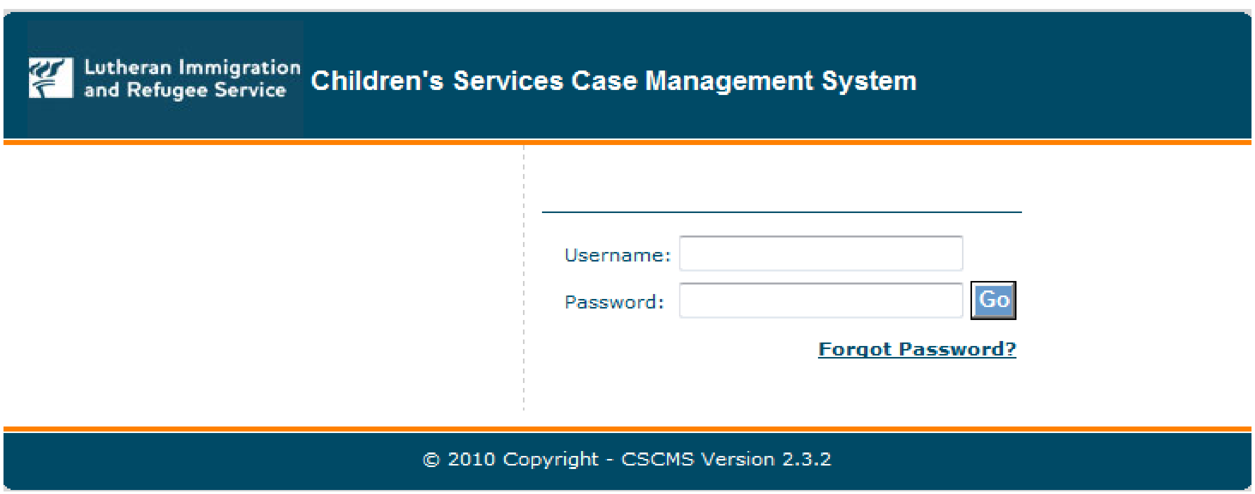


Fig. Dashboard Logout

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

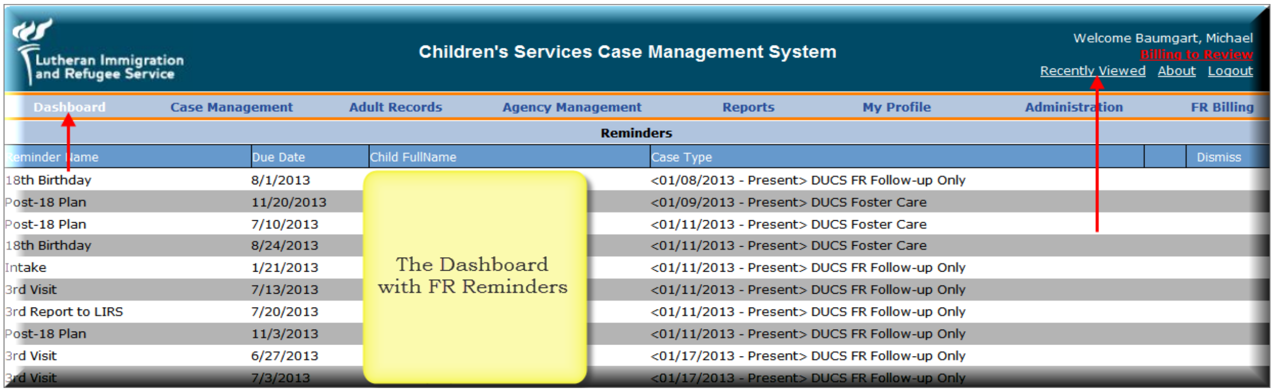


Fig. Dashboard Ribbon

4.1 Dashboard

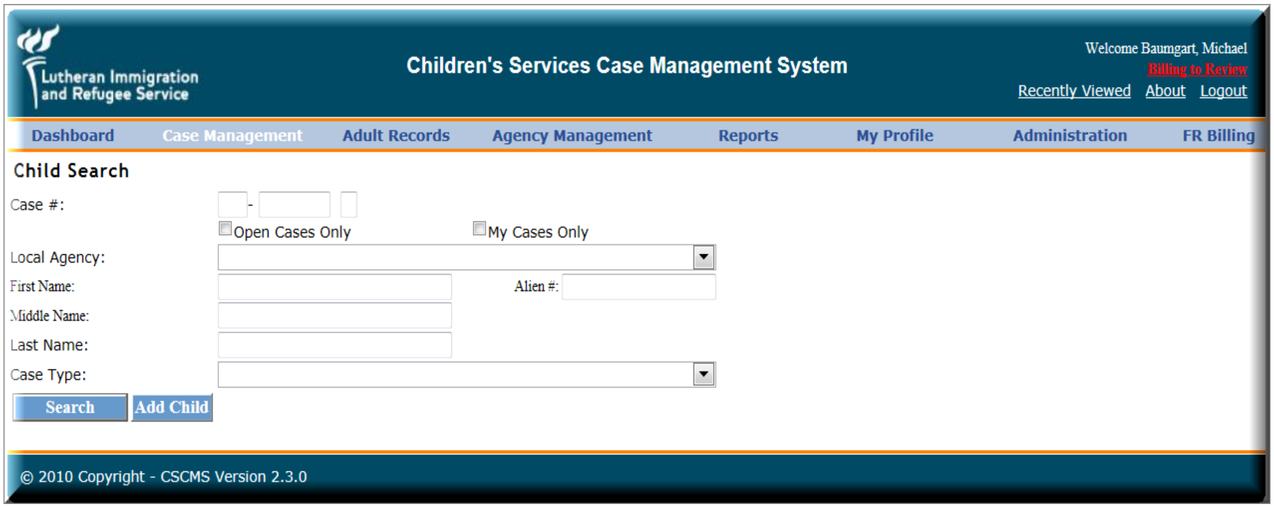
The Dashboard *Fig. Dashboard* is the default site of the Children's Services Case Management System database (CSCMS) *Fig. Dashboard Ribbon*.

❖ 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



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.

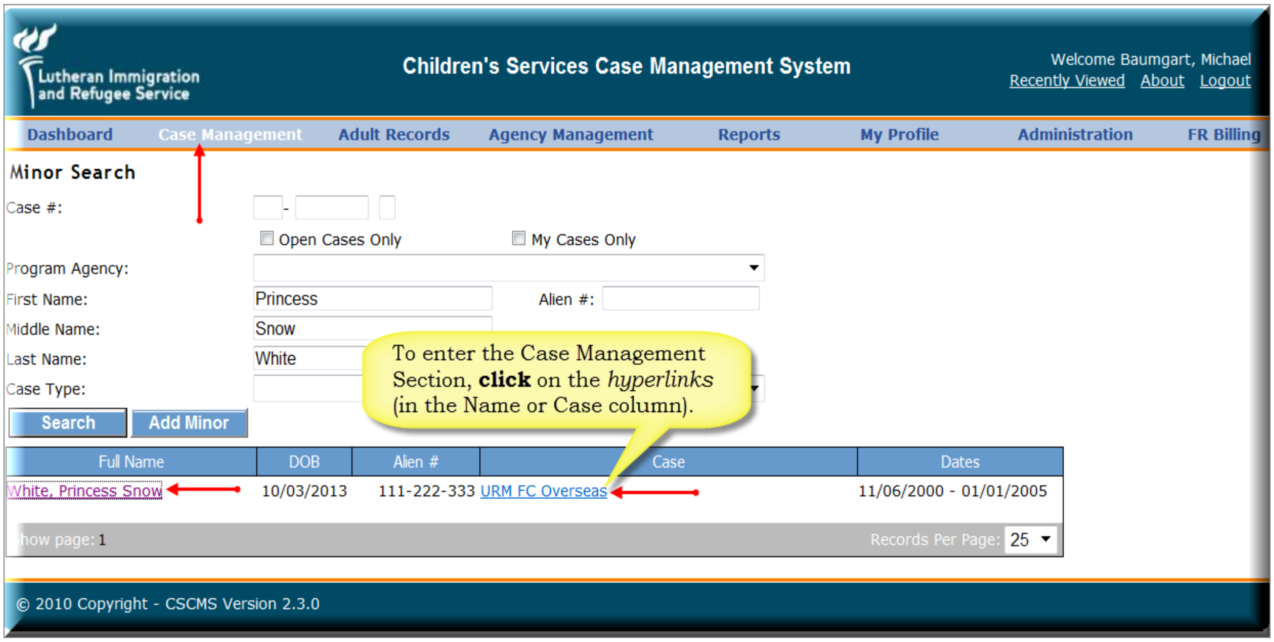
5.2 Minor Search

- 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



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:

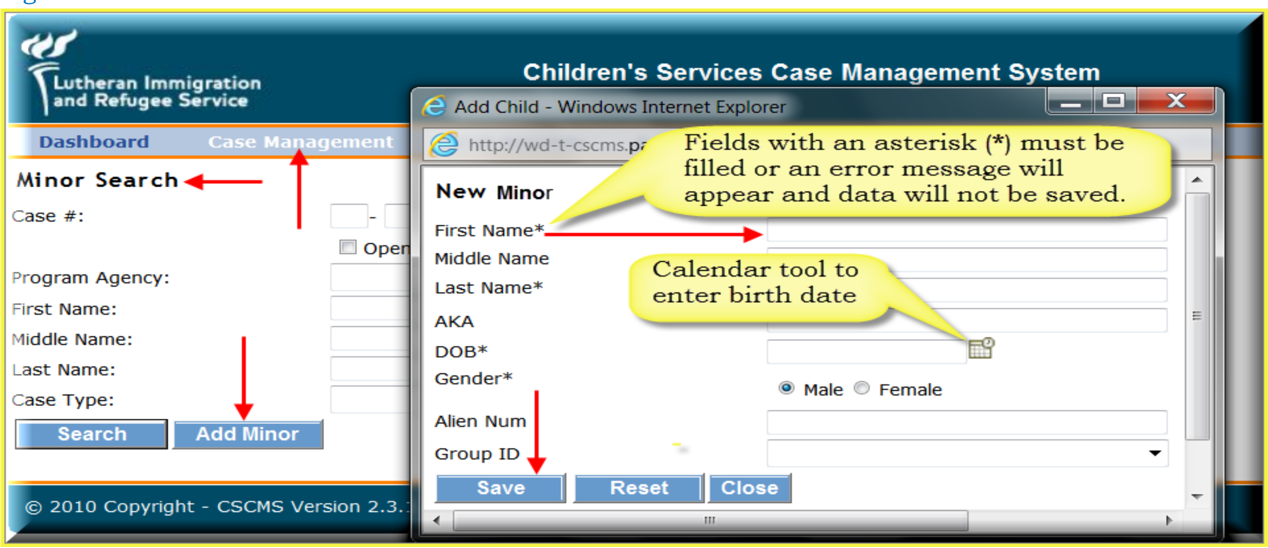
➢ In the Full Name column **click** the person's blue hyperlinked *name.* This will open the Details tab for that minor, or

➢ 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

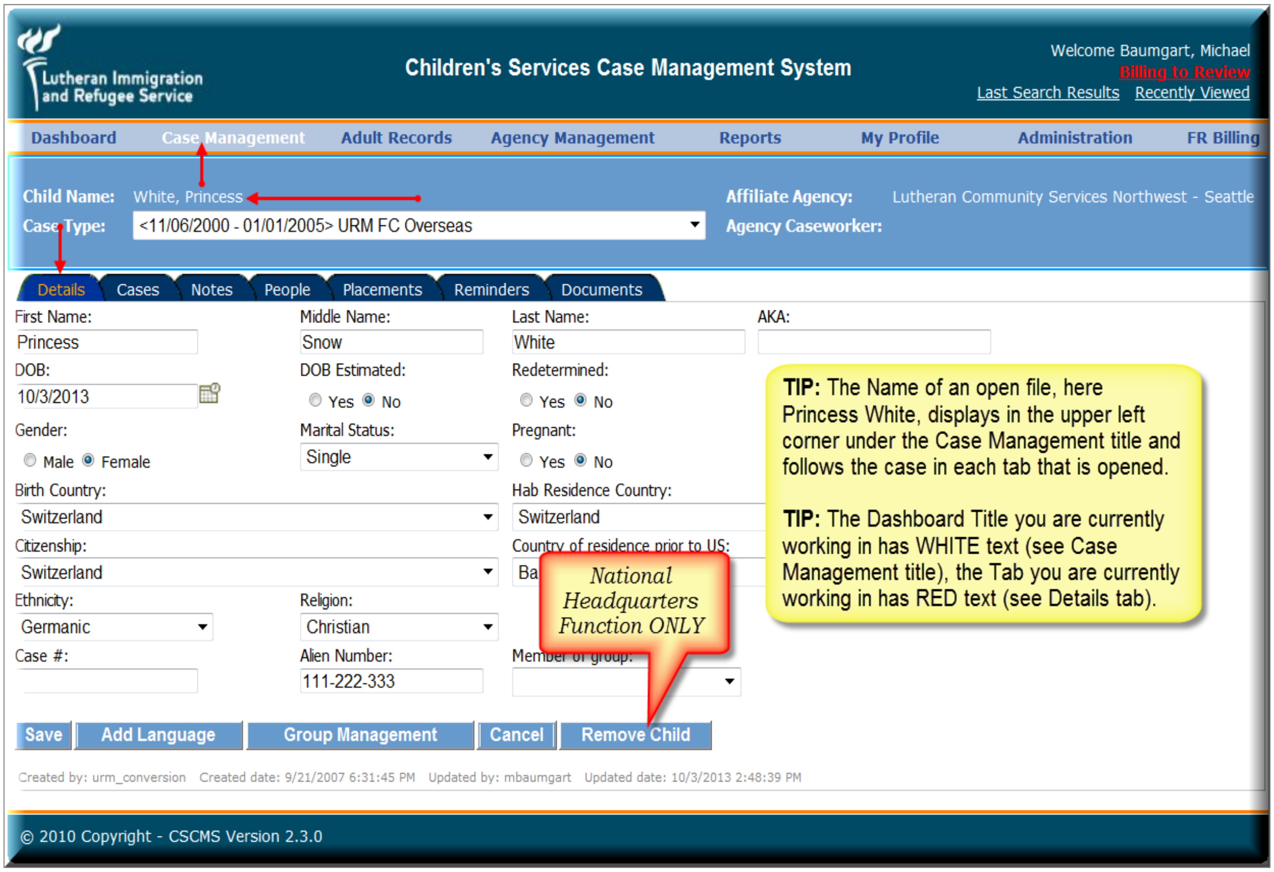
The Case Management Section (*Fig. Case Management Section Tabs Ribbon*) is where users access and update the majority of CSCMS case records using the Section tabs—Details, Cases, Notes, People, Reminders, and Documents.

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

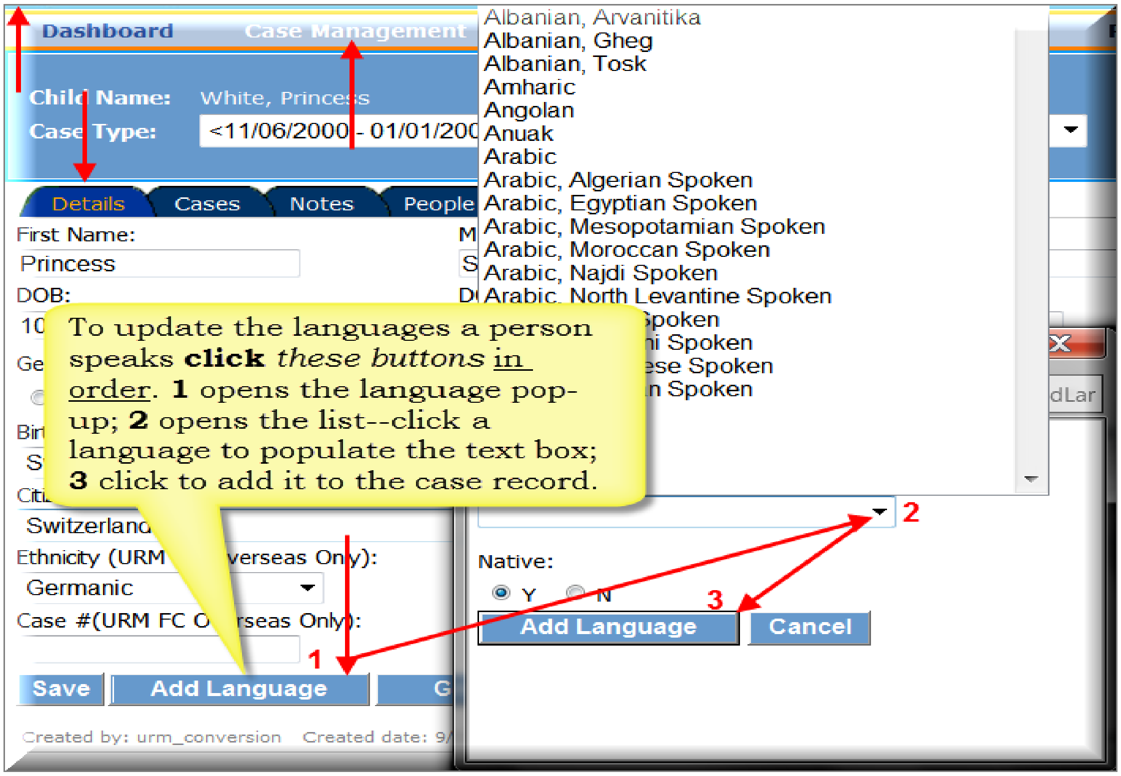
Fig. Case Management Cases Default Page



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.

Fig. Case Management Details Add Language



❖ Add Language to a Case to indicate the Minor's language:

➢ In this order, **click** *Add Language button* (**1**)

➢ In the Pop-up box, **click** *text box* (**2**) FIRST to open the list

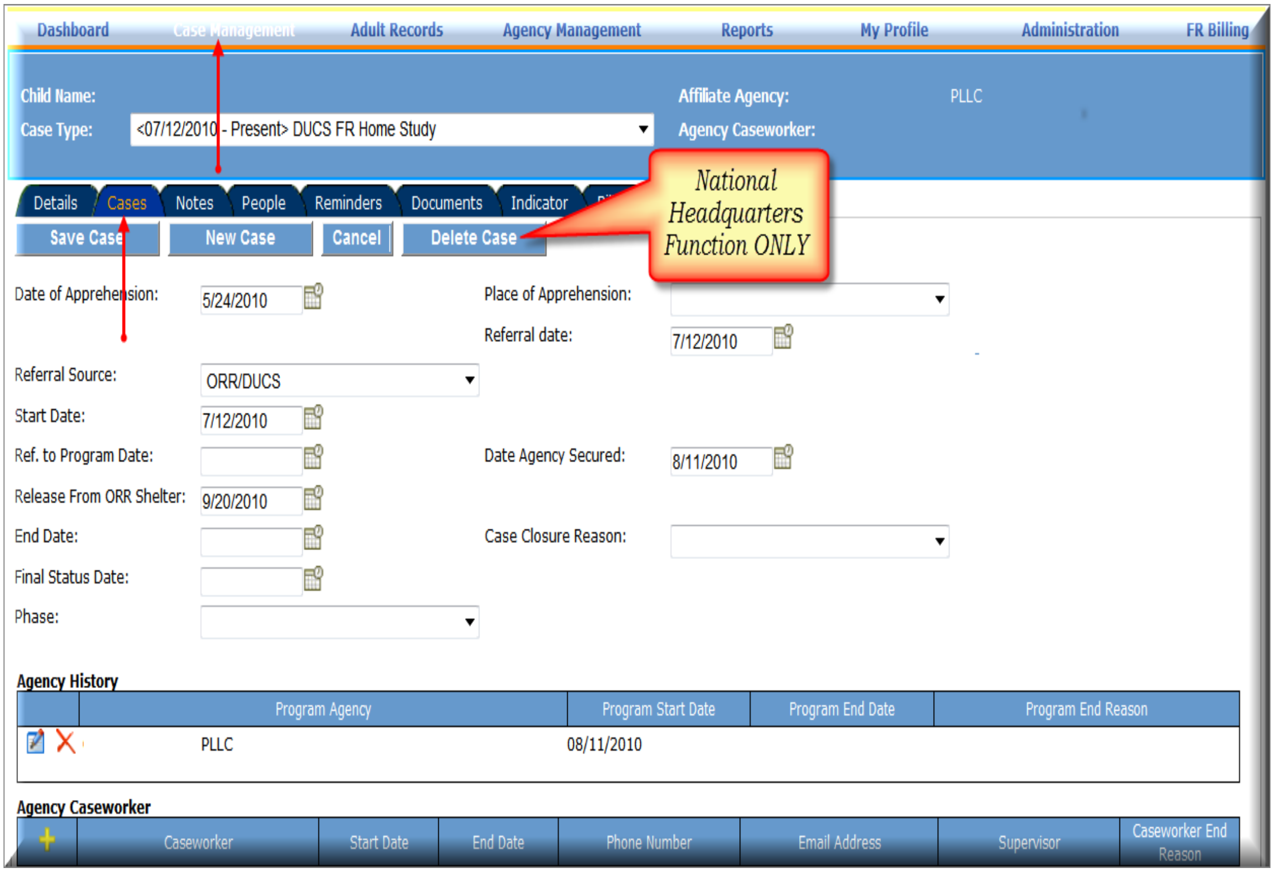
➢ **Click** *a language* to populate the text box

➢ **Click** Add Language button (**3**)

NOTE: More than one language can be added to the case if a minor speaks multiple languages. A language can also be designated as the minor's native language if known.

5.1.2 Cases Tab

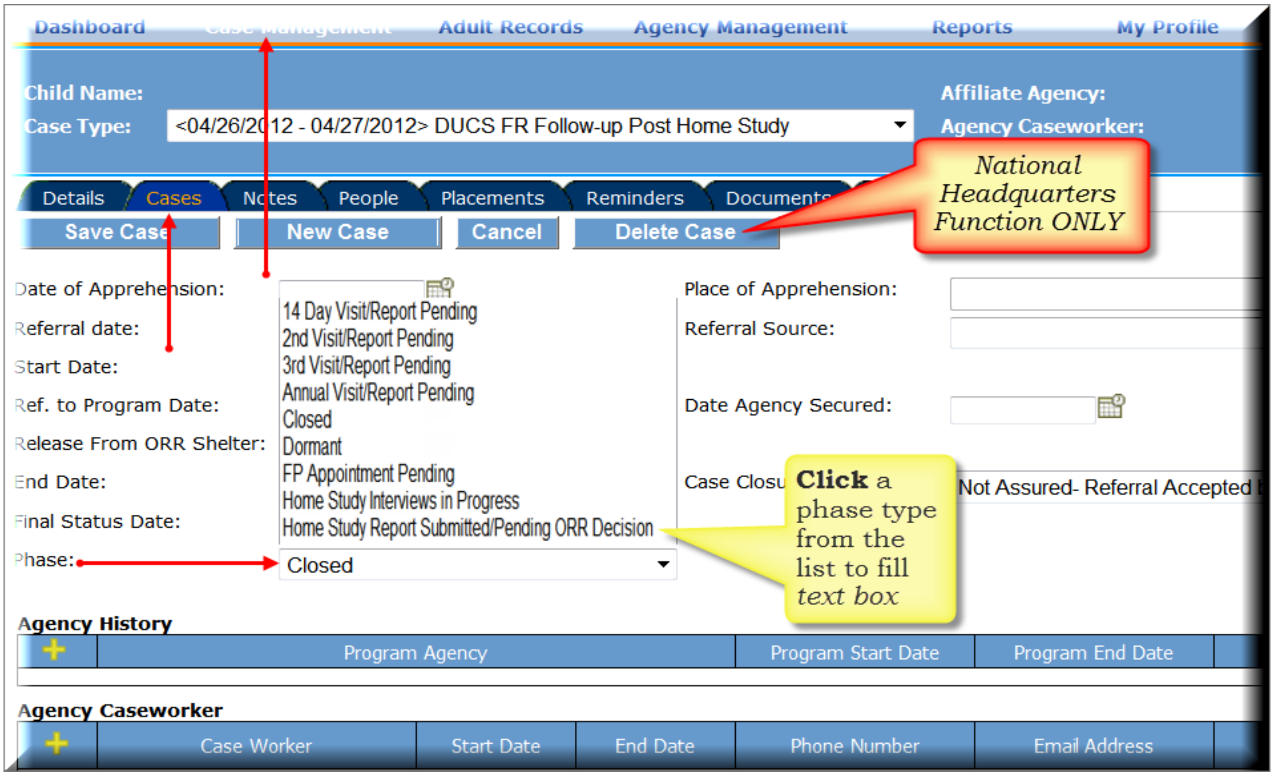
Fig. Case Management FR Cases Page



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.

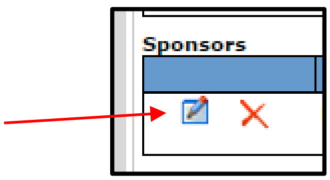
NOTE: In this section you will see **Yellow +** and **Red X** icons on the left side of a row. **A Yellow +** signals new information can be added to this record. The **Yellow +** will vanish if no further additions are allowed. A **Red X** is the 'Delete This Record' button. If clicked, a pop-up message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

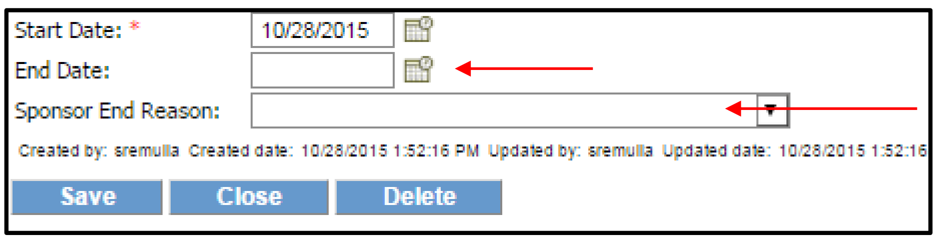
Fig. Case Management FR Cases Page w/ Phase Options



- 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 with 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.

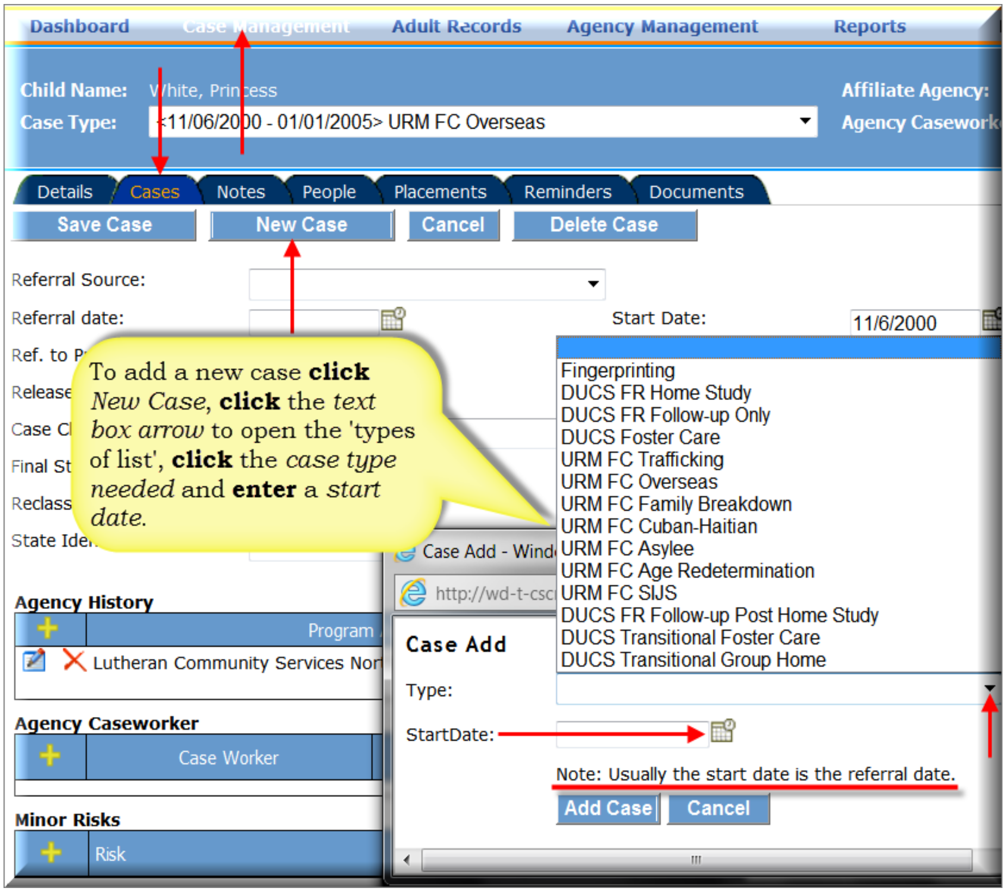




- Changes in Agency Caseworker
- Case Closure Information
  - End Date
  - Closure Reason
  - Indicators/Outcomes

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

Fig. Case Management Cases Add Case



❖ 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:

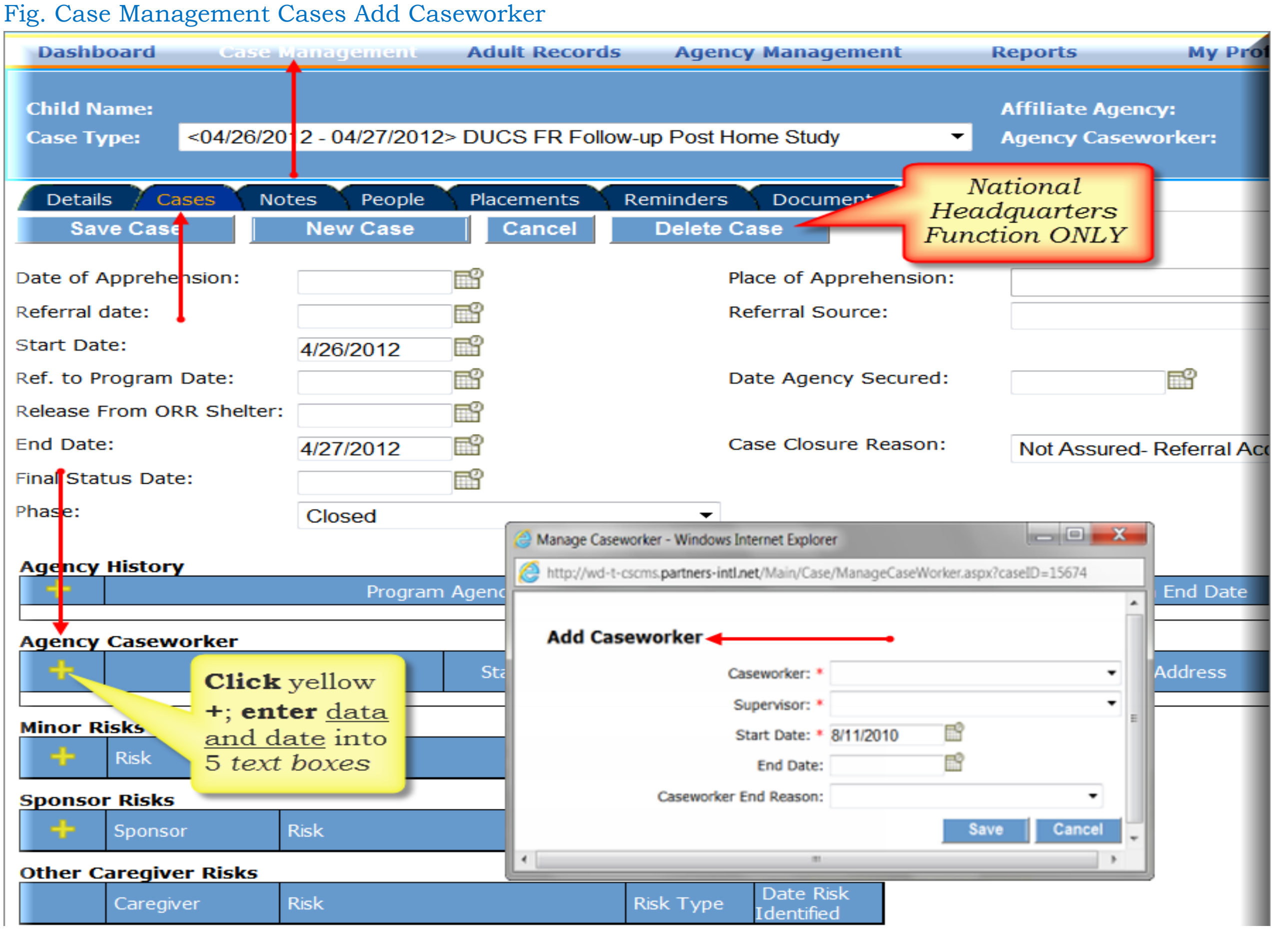
➢ **Click** the *yellow* **+**

➢ **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



❖ To add a Caseworker

➢ **Click** the *yellow* **+** (plus sign)

➢ In Pop-up

- **Enter** <u>data and date</u> in the 5 *text boxes*
- **Click** *Save*

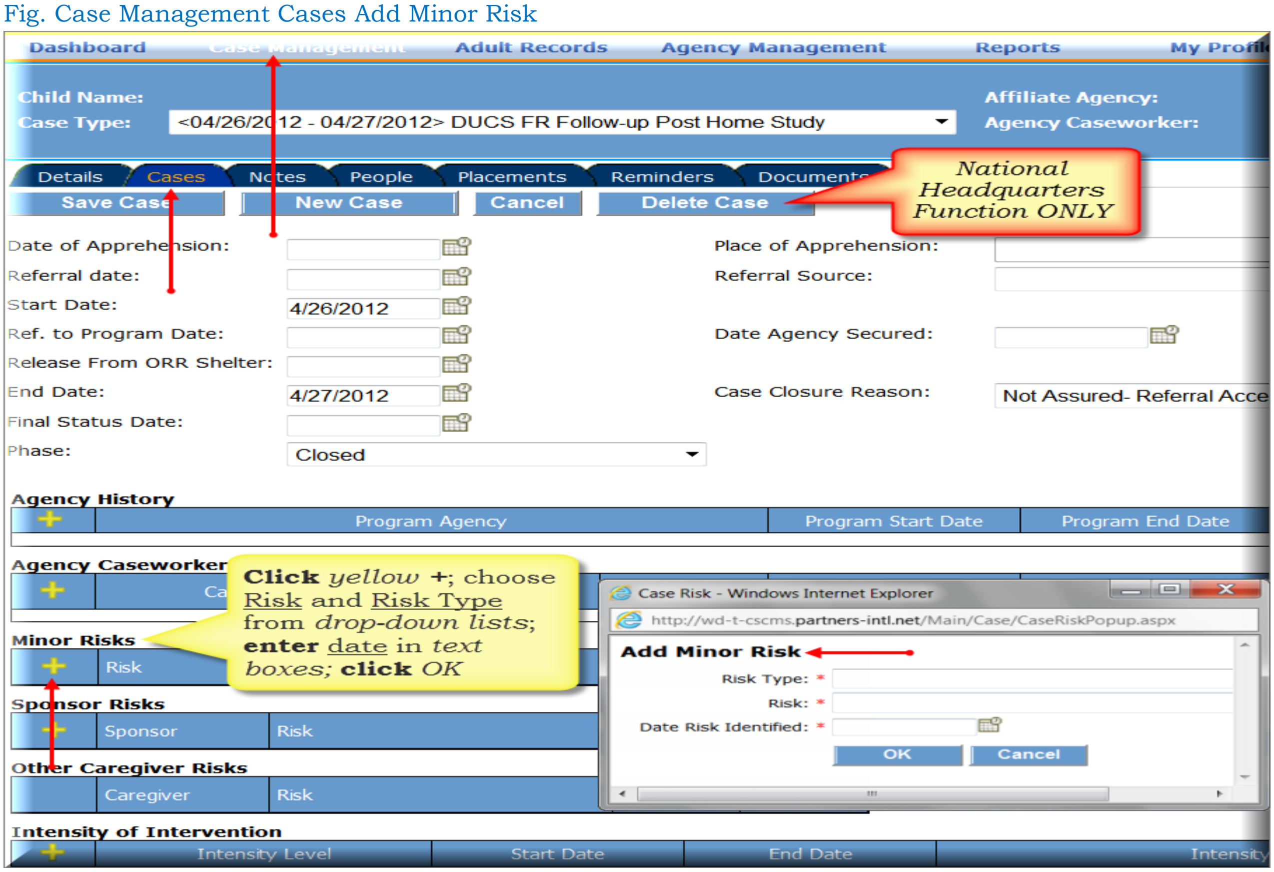
❖ If <u>ending/changing</u> a Caseworker, on the initial caseworker's information

➢ **Click** the Edit option

➢ **Enter** the End Date and End Reason

➢ Click *Save*

Fig. Case Management Cases Add Minor Risk

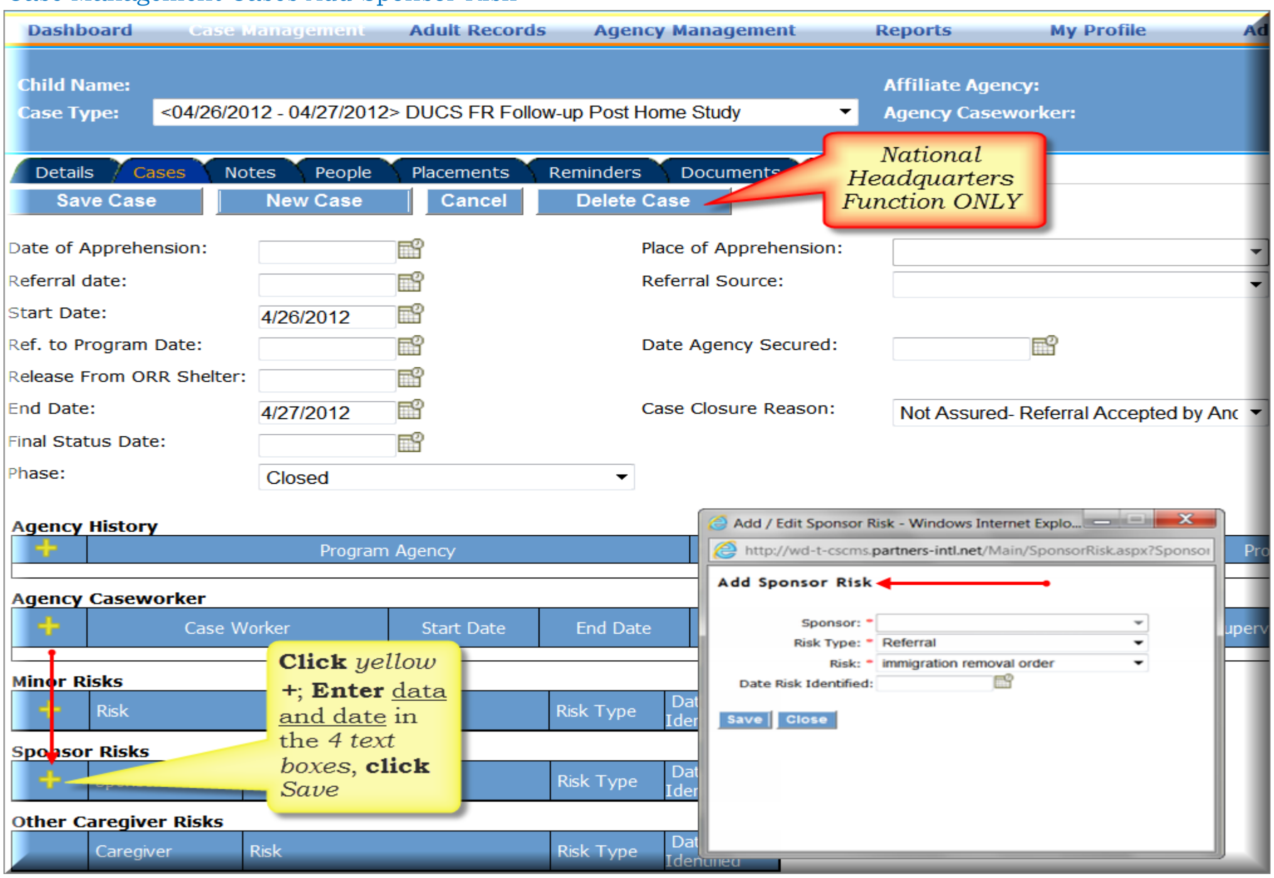


❖ To add a Minor Risks:

➢ **Click** the *yellow* **+** (plus sign)

- In Pop-up
  - **Choose** <u>Risk Type </u>(Referral or Additional) and <u>Risk</u> from *drop-down lists*
  - **Enter** <u>date</u> 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*

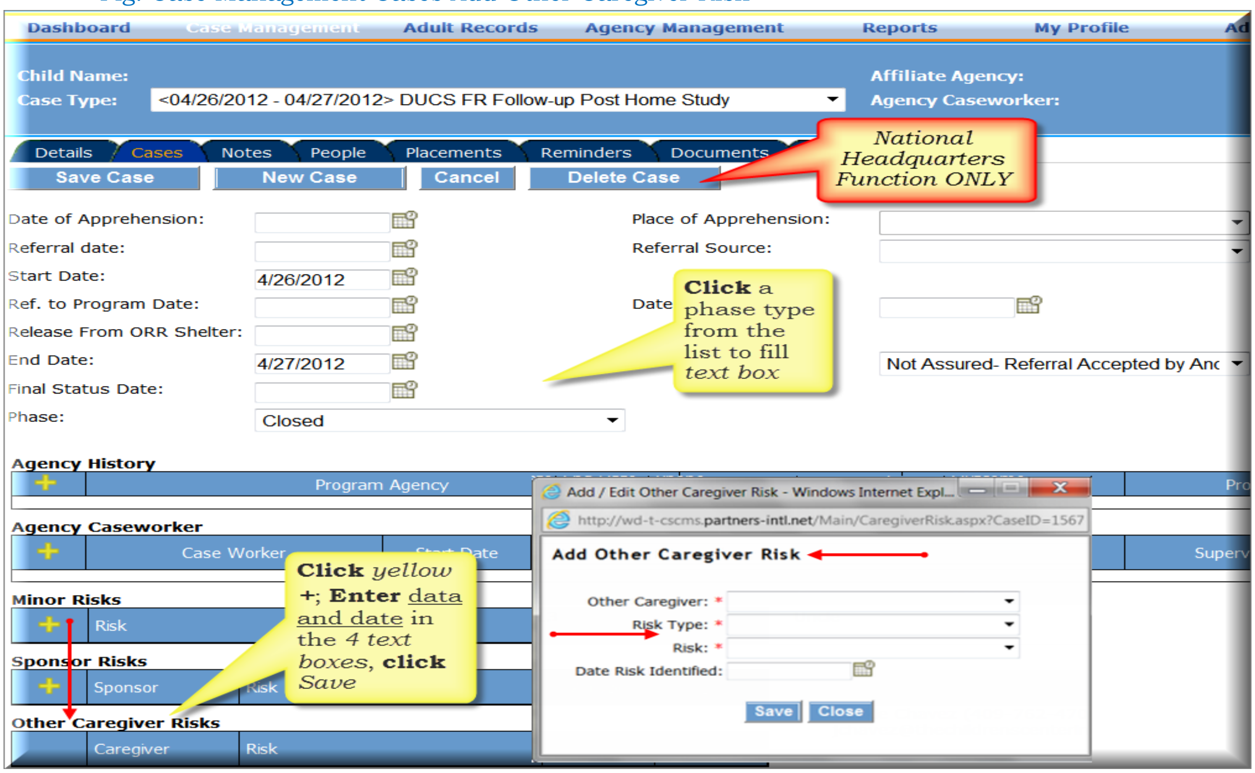
- **Enter** date in *text boxes* (Referral risks automatically populate date)

- **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

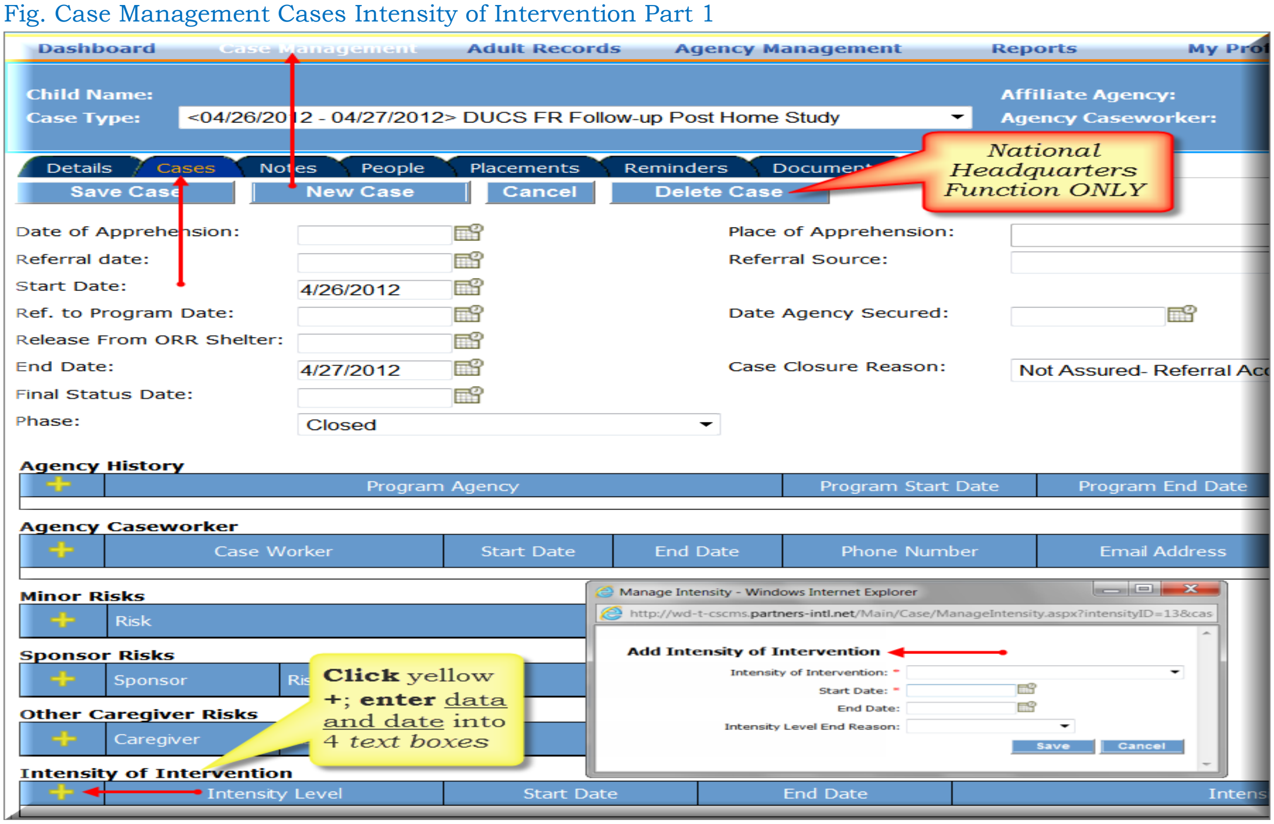


❖ To add Other Caregiver Risk:

➢ **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

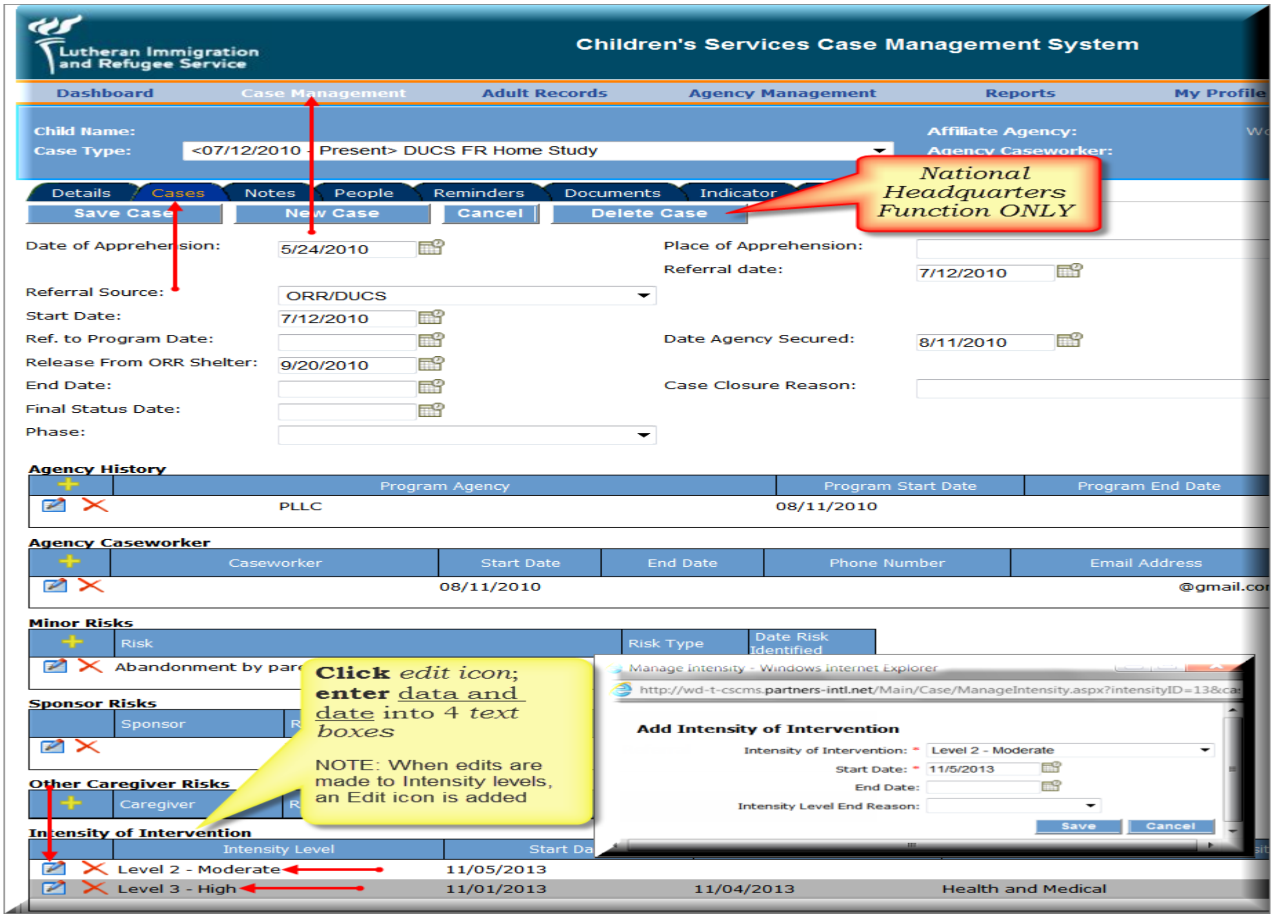


❖ To add an Intensity of Intervention:

- **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



❖ To <u>change</u> 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*

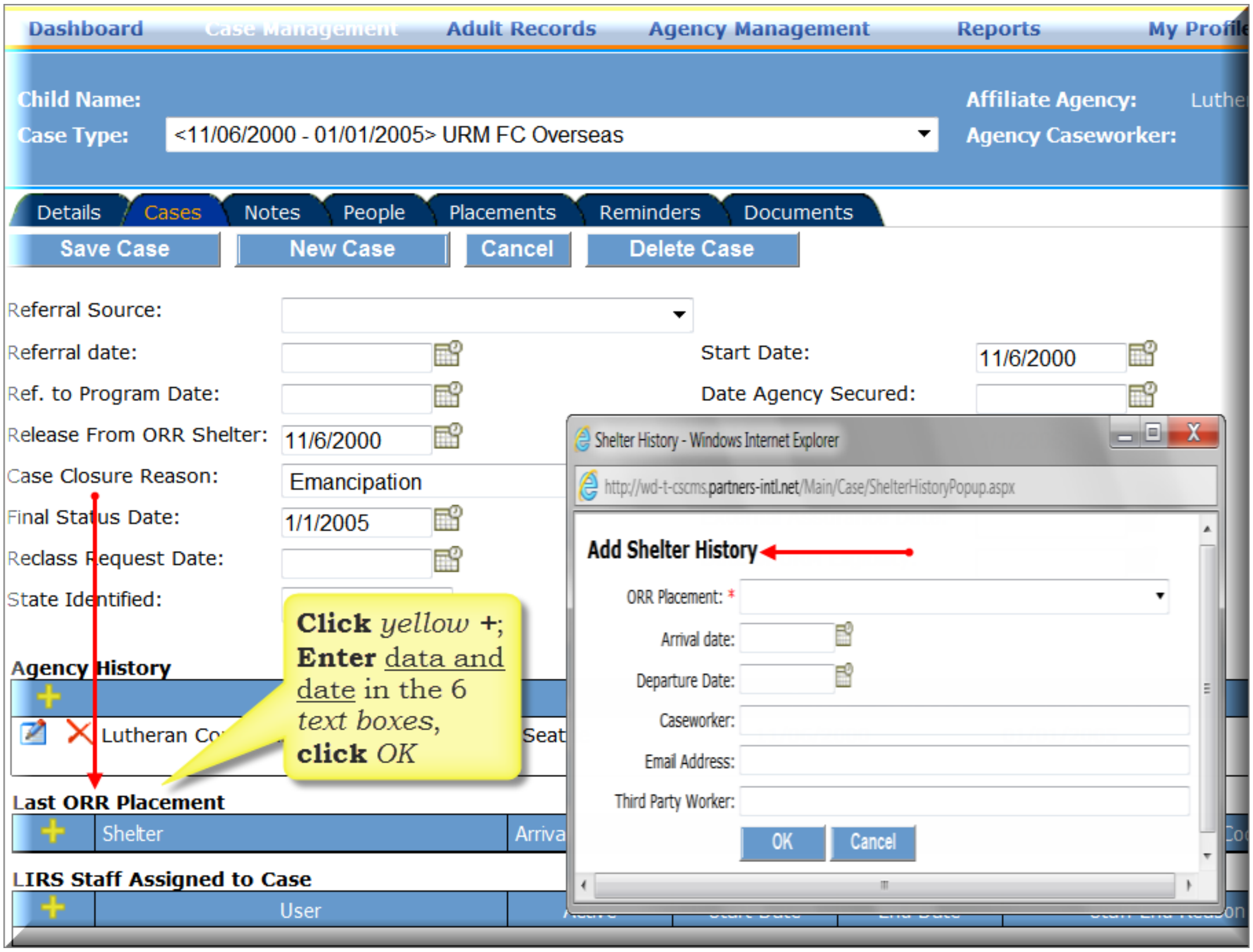
➢ Then add the new level by **Clicking** the Yellow +

➢ In the Pop-up

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

- **Click** *Save*

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



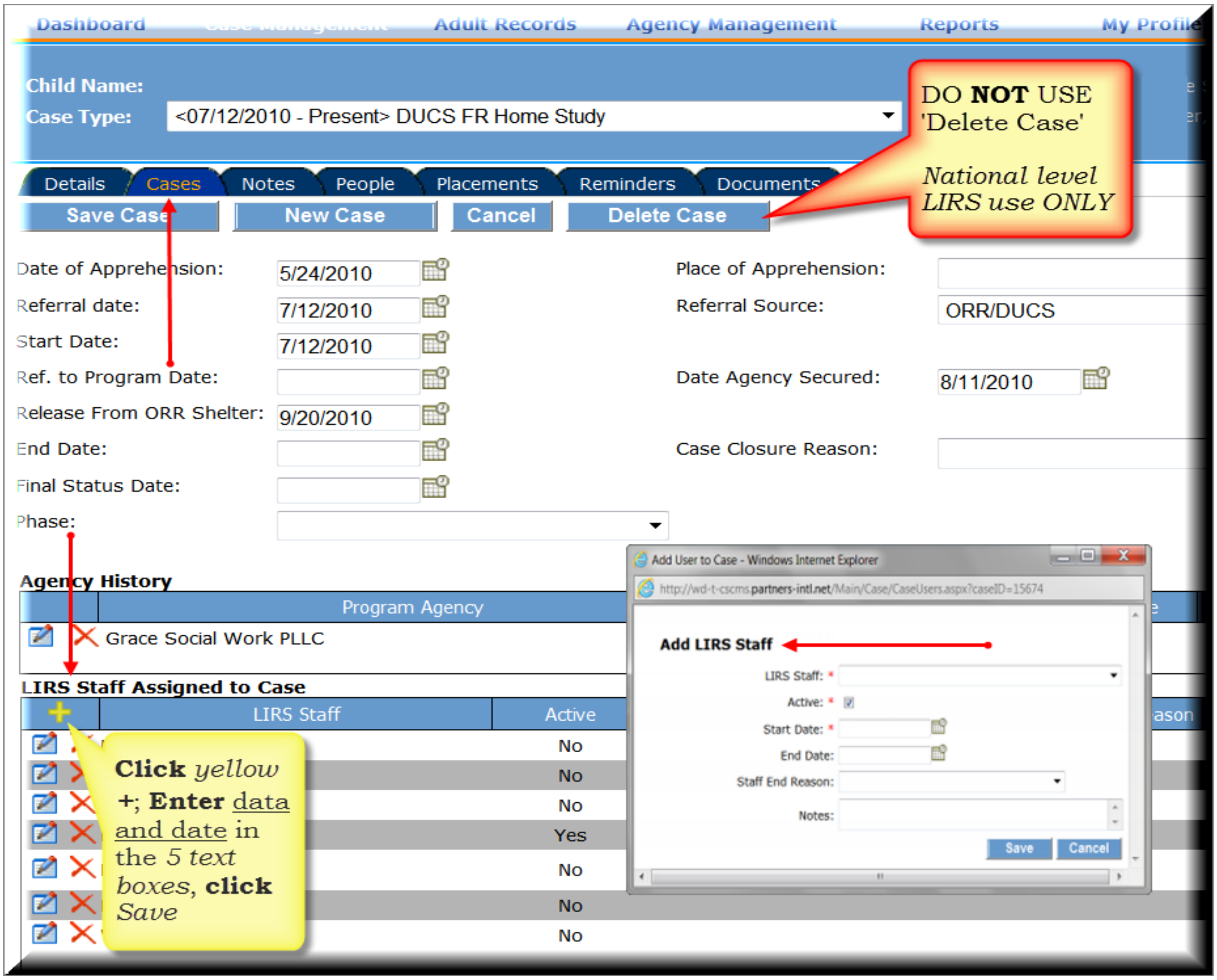
❖ To add/change Add Shelter History: **(LIRS National Headquarters Only)**

➢ **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



- 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

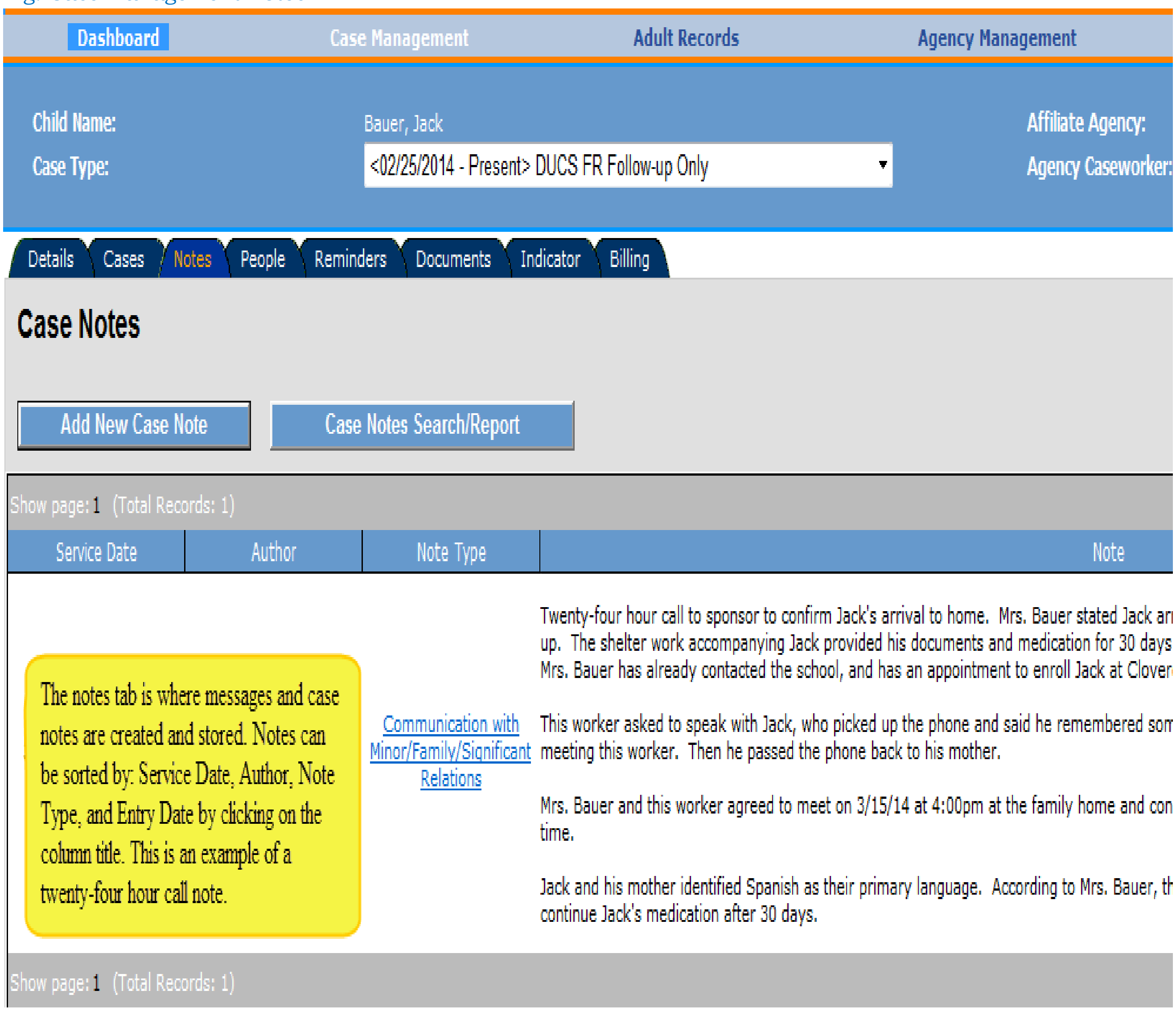
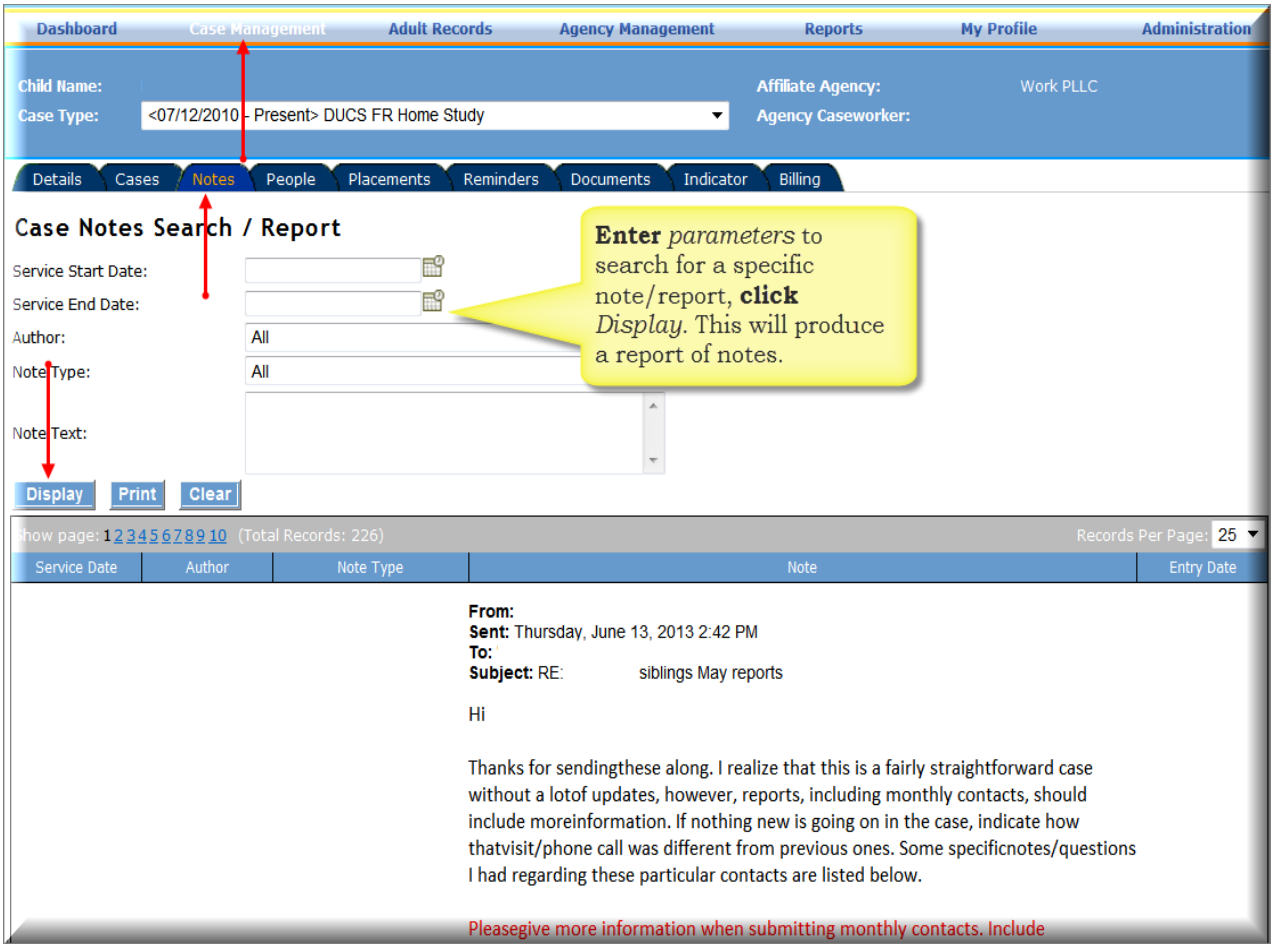


Fig. Case Management Notes Add Note

- 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*

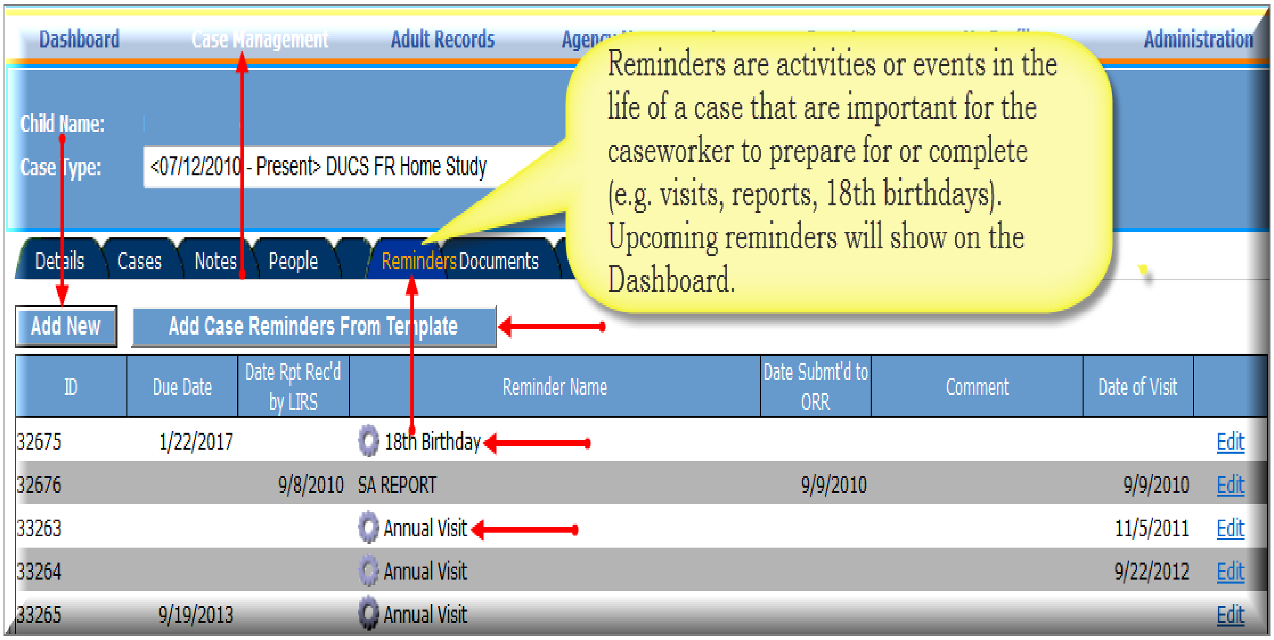
Fig. Case Management Case Notes Search/Reports



- 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

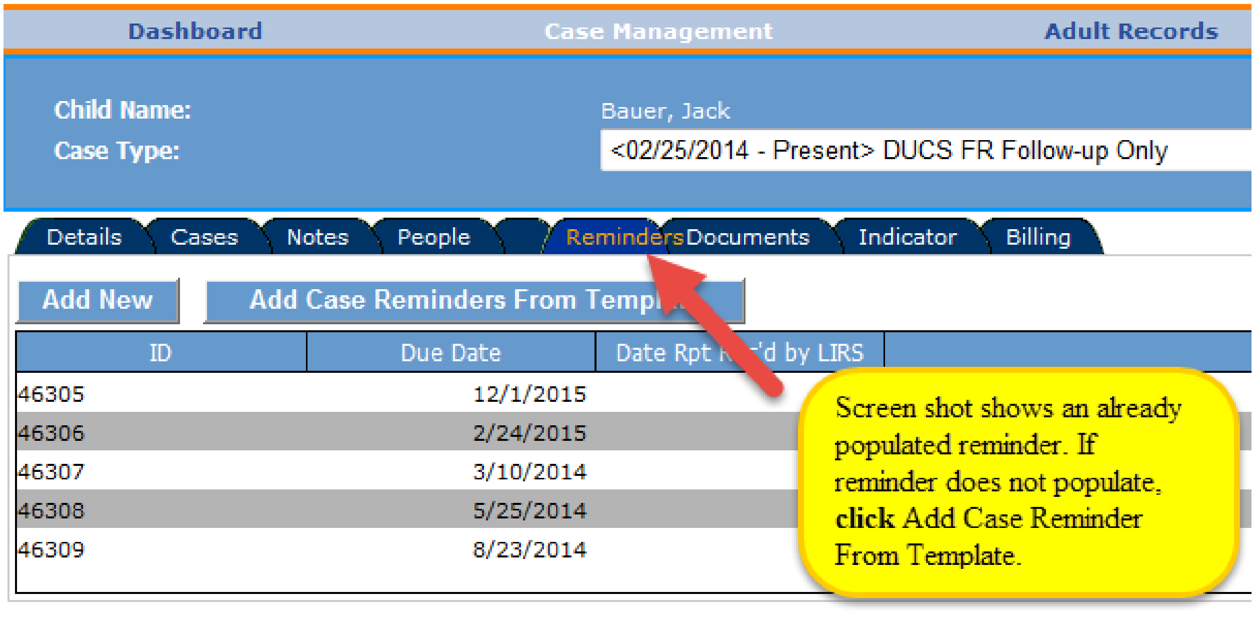
Fig. Case Management Cases Reminders Page



The work performed by case mangers 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



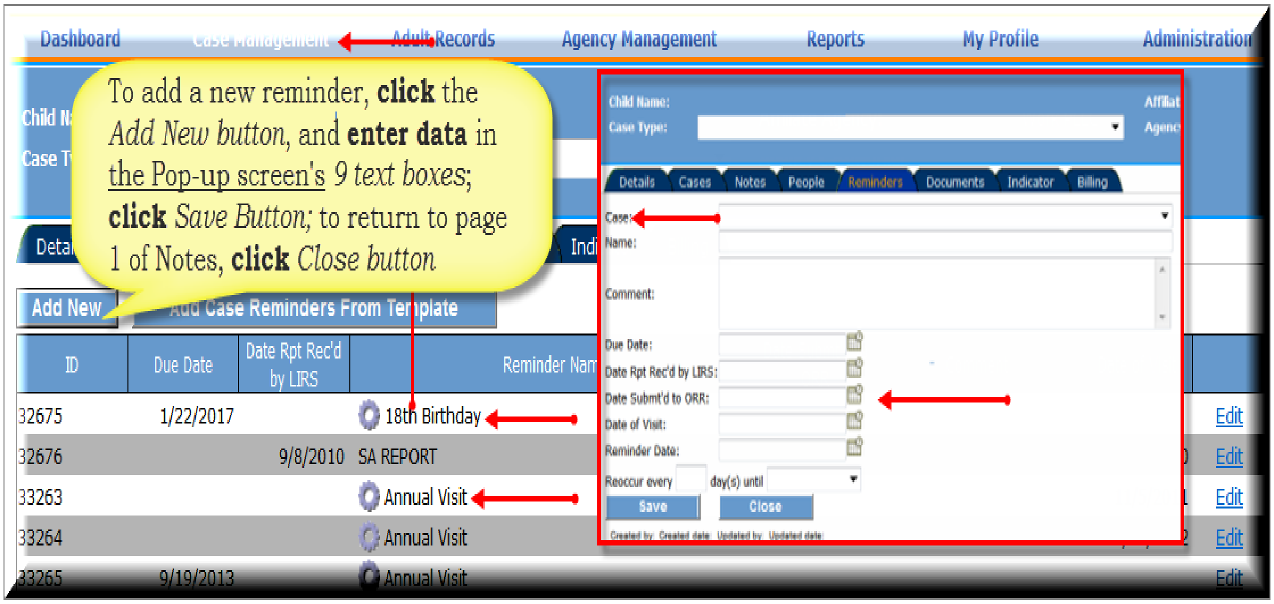
Adding Case Reminders from a Template will populate a predefined series of Reminders based on the release date of the minor and child's birthdate. If not automatically populated on a new case, it should be added when the user first receives the case in CSCMS.

❖ 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

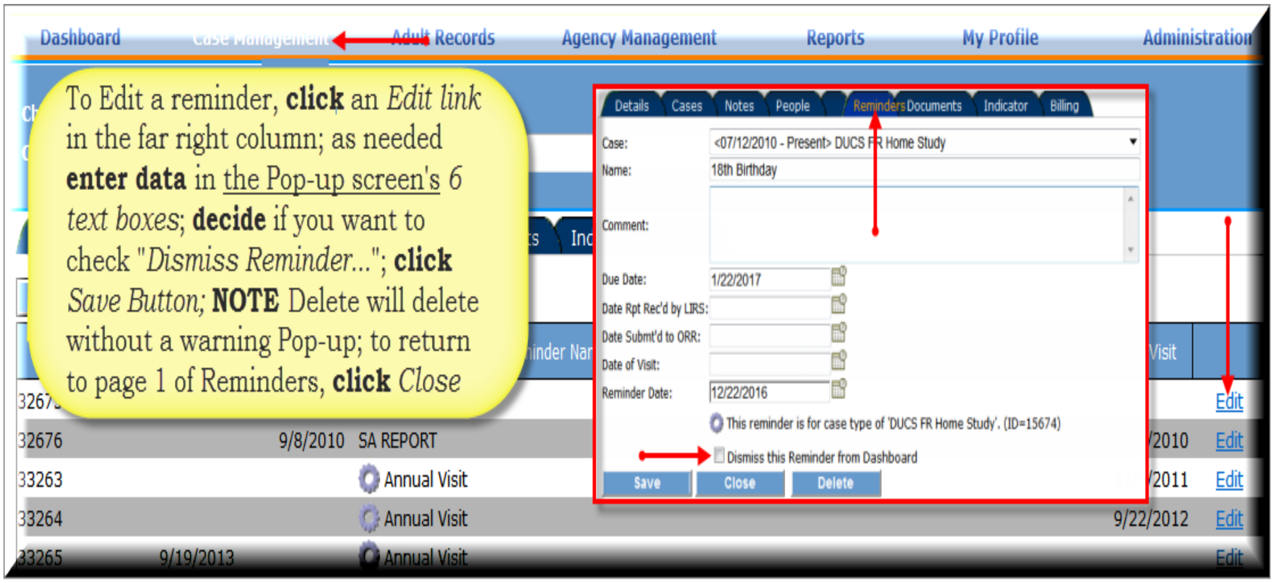


If desired, the user can add a custom Reminder to a case so a specific future action will appear on the Dashboard and Reminder screen.

❖ 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

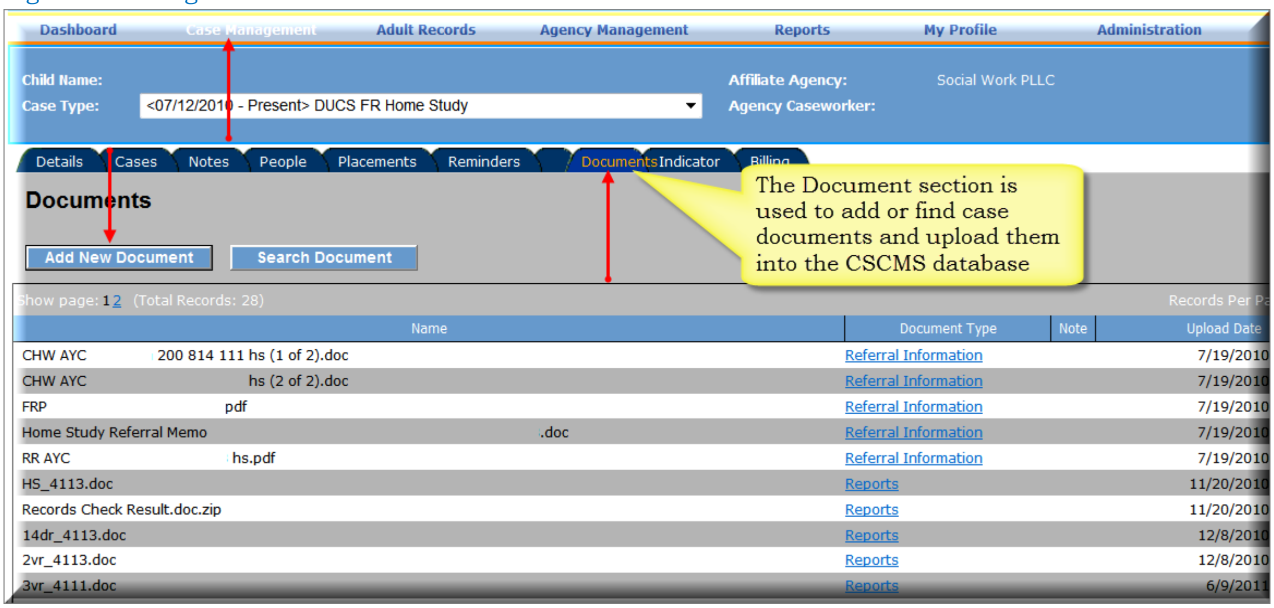
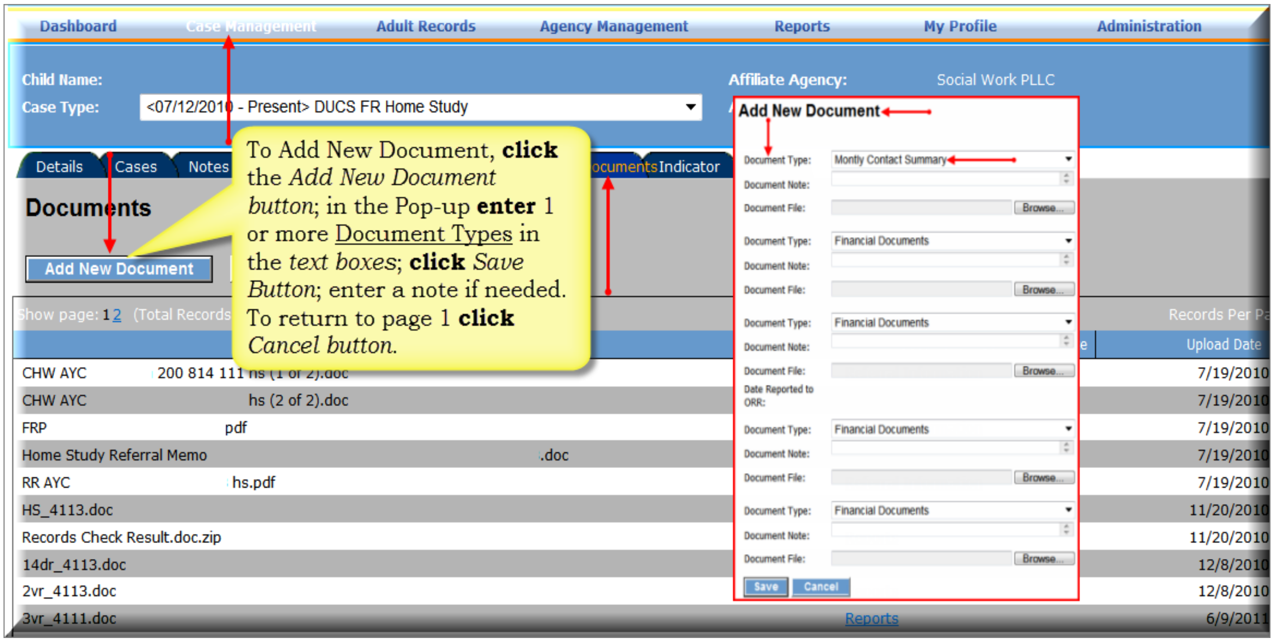


Fig. Case Management Cases Add New Documents



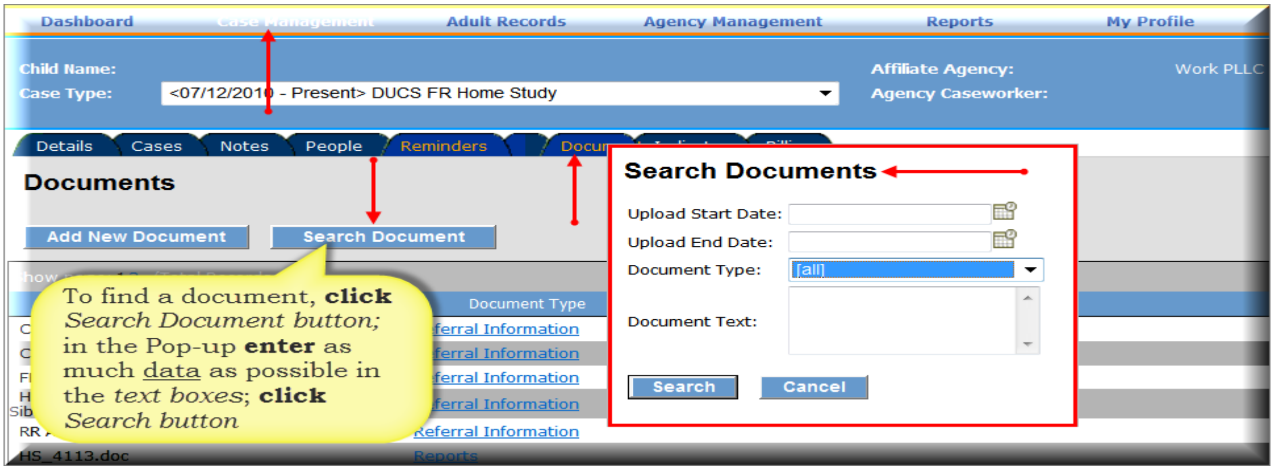
❖ To Add New Document:

➢ **Click** the Add New Document button

➢ In the Pop-up

- **Select** <u>Document Type</u> 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*

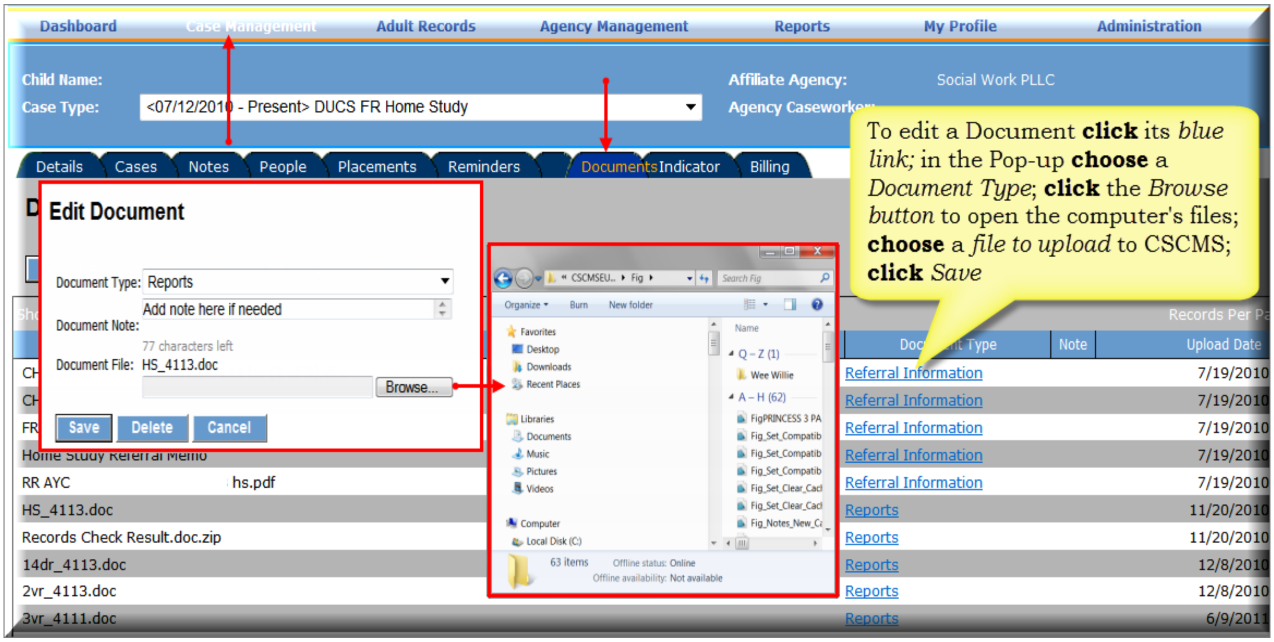
Fig. Case Management Cases Documents Search Document



❖ To find a document

- **Click** Search Document button
- In the Pop-up **enter** as much <u>data</u> as possible in the *text boxes*
- **Click** Search button

Fig. Case Management Cases Documents Edit Document



❖ To Edit a Document:

➢ **Click** its *blue link*

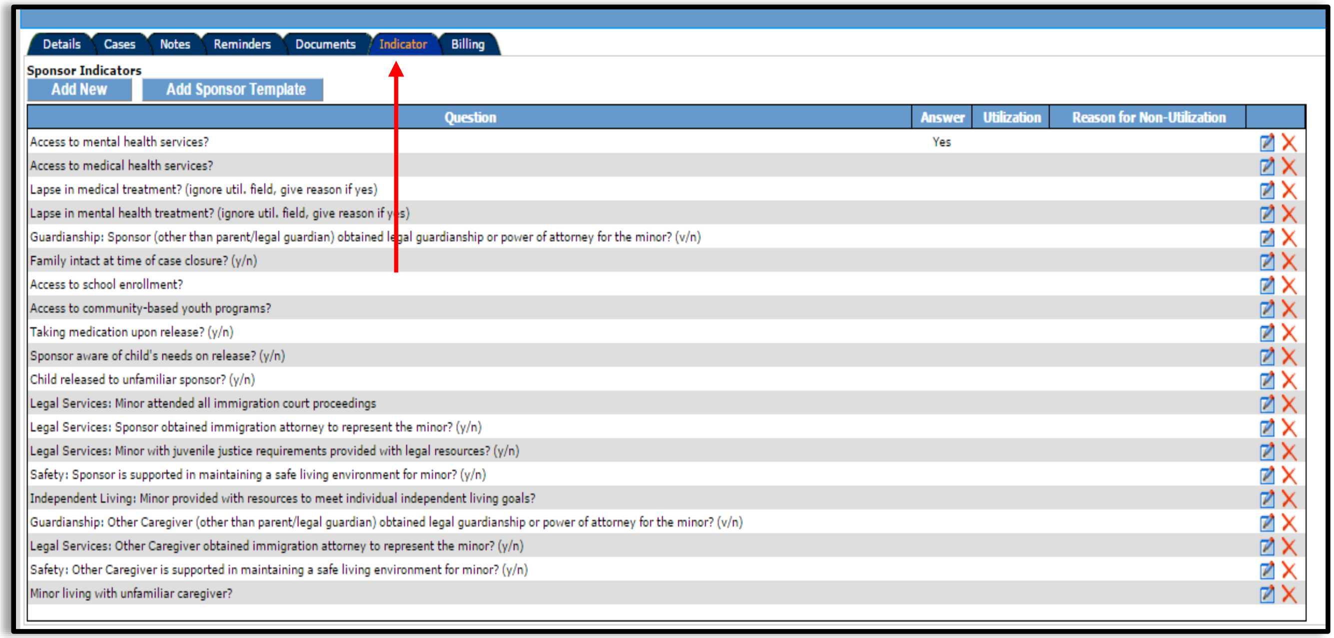
➢ In the Pop-up

- **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

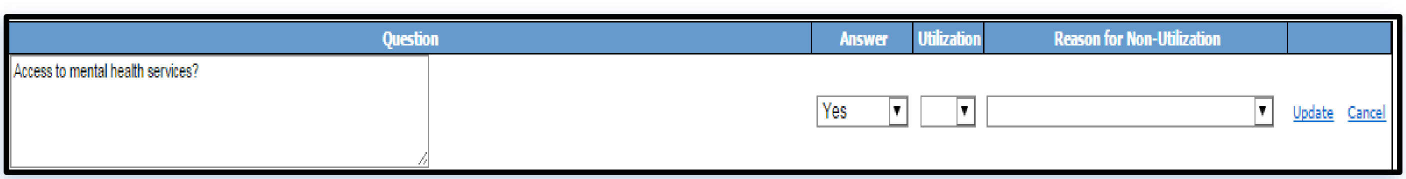
Must be completed at the time of case closure.

Fig. Case Management Cases Indicator



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:



- 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”