

Governed By: Operations	Effective Date: 8/5/2013							
Procedure: #3 CAP 60 Intake	Updated Last: July 2015							
Purpose: To provide guidance for entering new customer's into the computerized intake system								
for CAP programs.								

Summary:

Intake

The CAP 60 program is a computerized database system. Each user will be assigned to their designated program.

Search Client

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CAP → Search	 Agency Printable Documents * Custom Documents 	Search Cli	ent	≞ ∞								
Client	* Intake Form	Agency		Commission on Economic Opportunity								
'Search Client'	Add Household Quick Service	Center Nam Program	ie ()	All Not Assigned	•	Status	Not Assigned	▼				
allows you to		Caseworke	er -	Not Assigned	Additional Crit	Year	Not Assigned					
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search through		First Name Family ID/No).			County Address	All	·				
the list of clients		SSN Case No.				State	All Nat Assisted					
of the agency.		Member ID				Zip	Not Assigned					
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be used for:

- Checking if an applicant is already an existing client.
- Quickly accessing an existing family's profile.

How to use Search Client

Filters:

- Agency Always choose the name of your agency if your administrator has not set a default for you.
- Center Name This filter allows you to view the family members that are in specific centers.
- Program This filter allows you to view the family members that are already enrolled
- in a specific program. *Note: this should remain on "all" when checking if a customer is already in the system.
- Status This allows you to filter the family members by the status of their cases.
- Caseworker This filter allows you to see only family members associated with a specific caseworker.



• Year - Filter by year family member was enrolled.

* Note: These filters can be used in combination.

Search Fields:

- Last Name Allows you to search using a family member's last name.
- First Name Allows you to search using a family member's first name.
- **Family Number** Allows you to search using the systems automatically generated family ID or your agency's designated family number.
- SSN Allows you to search using the Social Security Number.
- **Case Number** Allows you to search using the system's automatically generated case ID or your agency's designated case number.
- The remaining search fields include: Member ID, Birthdate, Service No, Household ID, County, Address, State, City, Phone Number, and ID No.

When using the Search Fields make sure to click the **SEARCH** button.

When searching Last Name and First Name, you can use a partial word to search the beginning of a name.

- Searching the string 'AI' in the first name field will bring all the family members in the client list with a first name containing 'AI', including AI, Alan, Allen, Alanis, Alicia, etc.
- The system also allows you to search using the wildcard % symbol.
- This can be useful when there may be a typo in the client's folder for typically misspelled names such as 'Alan' or 'O'Reilly'.
- Searching '%Reilly' will bring all family members with the string 'Reilly' in their name regardless of what is in front or at the end of your search string such as O'Reilly, OReilly, McReilly, Mc'Reilly, etc.
- Searching 'Al%n' can bring results Alan, Allen, Alana, Allison, Alejandro, Alexander, etc.
- When searching a SSN you can search in three different ways including the social with dashes, the social without dashes, and the last four.
- Please note that unless you are looking for a specific customer, the more general the search filters are the better chance you have of finding someone in the system. So, keep the filters as open as possible (i.e. "all" or left blank).

Once you find the person you are looking for, click on the PENCIL on the left side of their row and you will be taken to the FAMILY INFORMATION page.



Admin

Save

Agency

Center

County*

First Name

Middle Name

Other Names

Primary Phone Time To Call From

Personal Email

Education*CSBG Race*CSBG

Health Insurance*CSB

Insurance Provider

Nationality

Legal Status Primary Langua

Tertiary Langua

Vetera

Veteran Disability

art Date

Service

Last Name

ID No.

Add Household Member

Agency Printable Documents

* Add Client - CSBG Express

* Add Client - Domestic Violence

* Add Client - LIHEAP AR Only

* Add Staff Member as Client

Add Volunteer as Clien

Search
 Add Household

* Add Client

* Add Client fr

* Add Client - Youth

Quick Service

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Volunteer

Select One

Select One

Not Assigned

None

Education

Commission on Economic Opportunity

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Basic

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Birth Date

Gender

t Information

3G Demographics

Characteristics/Other

Country Citizenship

Religion

Disabled^{CSBG}
 Ethnicity^{CSBG}

Relationship to HOH

Gender Identification

Secondary Phone

Time To Call To

SSN Check for Duplicates

Medicare

Other Insurance Provider

Secondary Language

Marital Status

Eligible Spouse

Service End Date

Comment

Receiving Service Connected Disability Compensation

an Information

Suppor

Tasks/Calenda

Not Assigned

Select One

Not Assigned

Place on Email lis

Not Assigned

Not Assigned

Not Assigned

Not Assigned

Not Assigned

Not Assigned

Disability Percentag

Medicaid

Other

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Site Visit

Finance

Group Activities

Add Household*

*Please search the family/individual <u>prior</u> to adding the household.

 $CAP \rightarrow Add$ Household \rightarrow choose the appropriate option.

Add Client is where you enter a new Family into CAP60: unless adding an existing staff member, volunteer, or Front Desk customer.

For Add Client -

- Begin with the Head of Household or the family member who is beginning the application.
- All sections with a red asterisk "*" or blue "CSBG" logo must be filled out. (Avoid using "unspecified" and "Not Assigned" as much as possible.)
- In addition to the items that are required, it is best practice to try to include as much data as possible for each family member/household.
- Once the first page is filled out *click* Save



Household Details is the next page

after "Add Client" is saved.

Required Fields:

- All sections with a red asterisk "*" or blue "CSBG" logo must be filled out. (Avoid using "unspecified" and "Not Assigned" as much as possible.)
- Residence Information: It is important to have an accurate address and information here, since some programs are tied to specific Counties.
- No. in Family: Technically it is not set as a required field

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	Primary Phon	ie:				Seconda	ry Phone	2							
	Additional Ph	one	Edit	Not Assigned		Addition	al Phone	1							
	1				Family C	ommen	ts								

but is needed to properly calculate the income eligibility of a family. Make sure this number always reflect the right number of people in the household.

- In addition to the items that are required, it is best practice to try to include as much data as possible for each household.
- Once the page is filled out *click*

Save	

Family Information is the next page after "Household Details" is saved.



To add another member to the household *click* on "Add Family Member".

If any family information ever has to be changed or updated, just *click* on "Edit Family Information".



Add Family Member

All of the same rules apply as above when adding a family member.

- Once the first name, last name, gender and birth dates have been filled out, be sure to "Check for Duplicates".
- Then continue to complete
 as much information as
 possible
 and click
 Save
- and click Save
 This will again return to the "Family Information" page

and more family members can be added as needed.

• Keep in mind that if you add more family members you will need to "Edit Family Information" and adjust the household size and save.

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* Case Information	Save	Save &	New	Cancel									
* Employment													
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* Emergency Contacts												neck for Du	uplicates
* EN005 Form											/ *		
* Housing Information	Last Modi	fied											
* Medical History					House	ehold Mer	nber Infe	ormation					
* Family Expenses	First Name	9*					Relation	ship to HOI	1	Not Assigned			-
* Financial Information	Middle Na	me					Birth Dat	te					-
* Family Notes	Last Name	e *					SSN						
* Signed Authorization Forms	Other Nam	nes					Gender*			Select One			-
* Shared Assessment	ID No.						Gender	Identificatio	on	Not Assigned			•
* Family Goals						Contact I	nformatio	n					
* Program Goals	Primary P	hone					Seconda	ary Phone					
* Referrals	Time To C	all From					Time To	Call To					
* Survey Response	Personal I	Email								Place on En	nail list		
Family Printable Documents						CSBG Der	nograph	nics					
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