



Q AND A

Q1. When enrolling an individual into a program, the program name does not appear in “add case”. What is the possible resolution?

A1. Check the Family Information to ensure that all programmatic requirements are completed on the family information page (i.e. county where the family resides is specified).

Always make sure the CAP user who cannot see the program in “add case” has program rights. When a new program is entered into CAP60 rights must be assigned to all.

Q2. When searching for customers the Center Name and County are defaulting to specific places. How do I change it to “all”?

A2. Start by clicking on the “My Account” tab at the top of the window. Then select “User Preferences” in the left side bar. Customize all drop downs and then save.

Q3. The CAP60 page does not appear to be fully expanded and I cannot see or scroll to the page contents. What is the problem?

A3. This could be a compatibility issue. Start by going to settings in Internet Explorer and clicking on “Compatibility View”. Then add the CAP60 page to the “Compatibility View” list.

Q4. How do I avoid duplicating households in CAP60?

A4. There are a few different answers.

- Be sure to search for customers by first and last name separately; leaving every other drop boxes “all”.
- When searching for a customer name that might be commonly misspelled; try searching with only a few beginning letters for the first and/or last name.
- Always use the “check for duplicates” drop box in the short/long application form. Once the customers birth date, first name and last name are input; change the “check for duplicates” drop box to “yes” and then click the link to the left “[click to check](#)”.

TIPS AND TRICKS

1. Whenever a drop down box says “select one”, you must select one of the choices.
2. No resource name begins with “the”, please search by the second word. (Example: Legal Project, The vs. The Legal Project).
3. The CAP Side Dashboard is currently not customizable.
4. Utilize the “Resource” tab in the top bar to search for different community resources.
5. Be sure that the URL you are using specifies “imser3” and not “imser2” following cap60.com.



Q AND A Continued

- Q5. While trying to refer a customer to a specific external resource, I cannot find the resource in the drop down box. What is the resolution?**
- A5.** All resources need to be individually added into the Resource Module by an Admin CAP user. Please follow Add/Remove/Update Procedure available on the Intranet under CAP60. Also, see “Tips and Tricks” #2 and #4.
- Q6. I have been notified that one of my customers has deceased. How do I reflect that within CAP60?**
- A6.** First go to the household in CAP, than select “Family Information”. Than select the ID# of the deceased. To the right of the “gender” drop box, there is a check box that says deceased; please check the box and then save.
- Q7. I need to delete a case because of duplication or incorrect information. How do I delete a case?**
- A7.** After locating your customer in CAP60, select “Case Information”. Once in Case Information, select “Case History” and there will be a delete option next to the program and case number. *If you cannot see the delete option you may not have privileges to do so.