



Operations Manual

Governed By: Operations	Effective Date: 8/5/2013
Procedure: #1 CAP 60 Enrollment	Updated Last: June 2015
Purpose: To provide guidance for enrolling customer's into specific CAP programs.	

Summary:

Enrollment

Once a customer has been entered into the CAP 60 program, they can be enrolled into specific CAP programs. The following is guidance on how to enroll a customer.

The screenshot shows the CAP60 Lite software interface. On the left is a navigation menu with options like 'CAP', 'Family Information', 'Case Information', 'Employment', etc. The main area displays 'Case Information' for Family ID No. 643, with fields for Head of Household (Bradley, Erin), Family Eligibility Income (\$18250.00), No. in Household (9), and No. of Families (3). Below this are three warning icons: a red exclamation mark for 'Form Warnings', and two green checkmarks for 'Family Warnings' and 'Person Warnings'. A 'Program' dropdown is set to 'All'. The 'Household Cases (Last 12 months)' table is shown below:

Case No.	Date Applied	Year	Name	No. in Household	Income	Program (Services)	Case Worker	Status
9221	04/15/2015	2015	Erin Bradley	1	\$0.00	Financial Resources Center	Doe, Jane	Approved
5668	07/03/2014	2014	Erin Bradley	9	N/A	Foster Grandparents	Bradley, Erin	Approved
4128	06/26/2014	2014-2015	Erin Bradley	9	N/A	Community Connections	Gwozdz, Renata	Pending
3804	04/23/2014	2015-2016	Erin Bradley	9	N/A	Empower NYC	Bradley, Erin	Approved
1258	12/20/2013	2013-2014	Erin Bradley	2	N/A	Family Support Services (FSS)	Bradley, Erin	Approved
6682	09/10/2014	2014	Cheese Hamburger Adjoined Family	9	\$18,200.00	Community Health Project	Bevin, Ariffa	Approved

**Please note that families/individuals should only be enrolled in a program ONE time. For continued enrollment year to year, cases will be rolled-over. Always check first to see if a particular family already has an active case for a specific program.*

CAP --> Case Information

This function allows you to Add a Case, View Case History, and Eligibility for the Family. In CAP60, all cases are assigned to the Family Member who applied for it. Each case is also assigned a unique identifier called a **Case No.**

Add Case - This will allow you to open a case and enroll a Family Member to a Program.

Case History - Shows all cases created and will allow you view or delete a case.

Eligibility - Will show the household eligibility after selecting a family member in the drop down.

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CAP --> Case Information Add Case

This tool allows you to open a case and enroll the Family into a program. In doing so, you have to assign this case to a specific Family Member.

Date Applied - This is the application date of the case.

Case # - You only need to use this if you have a pre-assigned Case number. If you leave this blank, CAP60 will assign a unique CASE No

Program Name - In this drop-down menu you can choose the program you want to enroll your Family too.

Case Worker - In this drop-down you choose the name of the case worker who is opening this case.

Family Member - In this drop-down you choose the name of the Family Member that this case will be assigned to.

Status - Choose the status of the Case.

View Eligibility - This will open another window and show you a list of all the Program-funding-source combinations. Based on the way these combinations are set, this list will show you which programs this family is eligible for. If the family is shown as ineligible for a certain combination, it will show the reason why.

Name	Gender	Birth Date	Age	Disabled	SSN	Relationship
Bacon Hamburger Adjoined Family	Male	01/01/1990	26	No		Head of Household
Bacon Hamburger Adjoined Family	Male	12/10/1993	21	No		Head of Household
Onese Hamburger Adjoined Family	Female	01/01/2003	12	Not Assigned		Daughter

**** Note:** While a family member may be displayed as ineligible in the gridview, the software will not stop you from adding the case anyways. It understands that there can be extraneous circumstances outside of the normal eligibility requirements set by your administrator. If you do add a case under such circumstances, it is recommended that you place a note in the comments section of this page so any future auditor may be made aware of the situation.

Denial Reason - This allows you to track why someone was denied if you decide to set the status as so. The dropdown will be populated by your administrator.

Once the Family Member is selected a box will appear at the bottom with the names of all of the household members. Select any household members to add to the case.

Cancel - This will bring you back to the Case Information page.

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Case Related Income - Quick Add

Save Skip to Case

Client Name	No. in Household	Income	Case No.	Year	Program	Date Applied	Status
Bradley, Erin	9	N/A	10408	2015	WIC	06/29/2015	Pending

Current Household Eligibility Income Total = 1

Family Member	Type	Source of Income	Amount	Interval	Date Received
<input type="checkbox"/> Erin Bradley	Employment	Paychex (s)	\$50.00	Daily	

Save – This will save the new case, and bring you to a “Case Related Income – Quick Add. You can choose the eligibility income or “skip to case”. “Skip to Case” will simply open up another blank case form. To save the case, click “save” here.

That will bring you to the “Case Summary” for the case that you just created.

From here you can either “Add Service(s)” or go to the side bar and click “Case Information” to see the list of all the cases for the household.



Case Summary

Cancel

Client Name	No. in Household	Income	Case No.	Year	Program	Date Applied	Status
Bradley, Erin	9	N/A	10410	2015	WIC	06/29/2015	Pending

Process/Workflow

Forms and Applications Total = 0 Required Documents Export to Select One

Add Service View All

Service	View	No. of Services Provided	Vouchers
Breastfeeding Support Referrals and a Variety of Nutritious Foods	Service History	0 (Last Service: N/A)	

CAP --> Case Information

Case Information – Shows a list of all the cases in that particular household. Click on the “Case No.” to enter into the case summary.

Process / Workflow – This grid-view will list all the forms or pages that were pre-assigned to this program with an order or due dates. If you click on the hyperlink on any of the rows, it will bring you to associated form. If the forms have been configured in a specific order, you will not be able to access forms out of that order. Please fill out the first page so that you can move on to the next.

Forms & Applications – This grid-view will list all the forms or pages that were pre-assigned to this program. If you click on the hyperlink on any of these rows, it will bring you to these pages.

Case Information

Family ID/No.	Head of Household	Family Eligibility Income	No. in Household	No. of Families
9871	Schmoe, Joe	N/A	1	1

[Add Case](#) [Case History](#) [Eligibility](#) [Form Warnings](#) [Family Warnings](#) [Person Warnings](#)

Program: All

Household Cases (Last 12 months) Family Cases - Shown: 2/Total: 2

Case No.	Date Applied	Year	Name	No. in Household	Income	Program (Services)	Case Worker	Status
10429	06/30/2015	2015	Jody Schmoe	1	N/A	Community Connections	Gwocdz, Renata	Applied
10428	06/30/2015	2015	Joe Schmoe	1	N/A	VITA	Gwocdz, Renata	Applied

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Goals – This functionality allows you to set up goals with your client. In this situation, the goals are defined by the case worker and Family Member. You are also able to set up a plan to accomplish these goals.

Available Services – This table will list all pre-assigned Services that are available under this program. By clicking on the Action hyperlink on a service, you are able to provide a service for your client.

Follow-ups/Referrals – By clicking on the “Add New Follow-up / Appointment / Action” you are able to provide these to the Family Member. All referrals to the customer should be tracked here.

Required Documents – This is list is agency-defined. This is the checklist for all the Required Documents for this case. You have the ability to indicate the date of when the document was received and also upload a scanned image of the document.

Add Service			View All
Service	View	No. of Services Provided	
Case Management	Service History	0 (Last Service: N/A)	Vouchers
Non-Emergency Transportation	Service History	0 (Last Service: N/A)	Vouchers
Writs End Peer Support Group	Service History	0 (Last Service: N/A)	Vouchers
Advocacy	Service History	2 (Last Service: 03/27/2014)	Vouchers
Support	Service History	1 (Last Service: 03/17/2014)	Vouchers
Initial Contact	Service History	0 (Last Service: N/A)	Vouchers

CAP --> Case Information --> Case Summary

View all services for a particular program by clicking here

Or view the history of a particular service alone by clicking here

This page allows you to Add, Edit and Delete Services. The grid-view will show you a summary of all the services that are provided by the agency under this case.

Add – This allow you to request for a service

Cancel – This will bring you back to the Case Summary page.

 - Allows you to Edit an existing service

 - Allows you to Delete an existing Service