Operations Manual

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.	

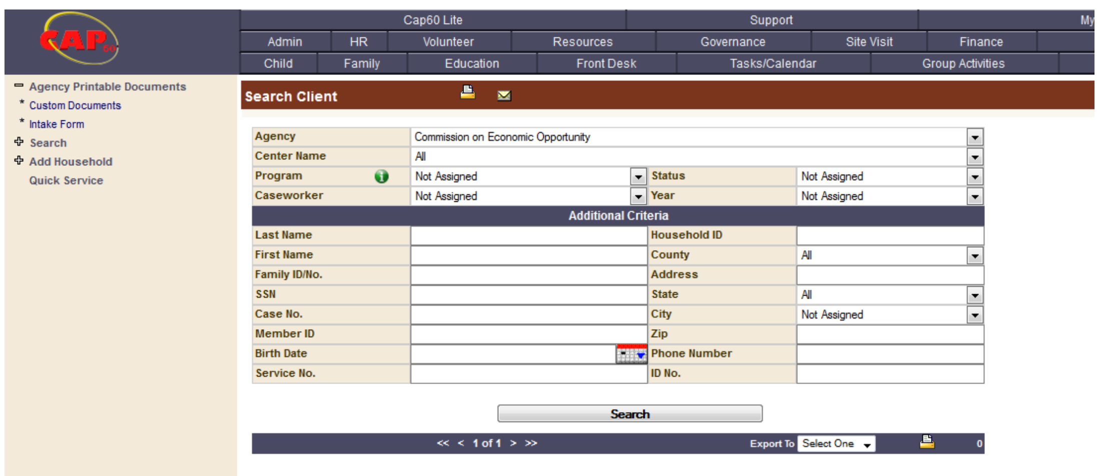
Summary:

Intake

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

Search Client

CAP → Search Client
'Search Client' allows you to display and search through the list of clients of the agency.



This tool should be used for:

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

<u>How to use Search Client</u>

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 'Al' in the first name field will bring all the family members in the client list with a first name containing 'Al', including Al, 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).*

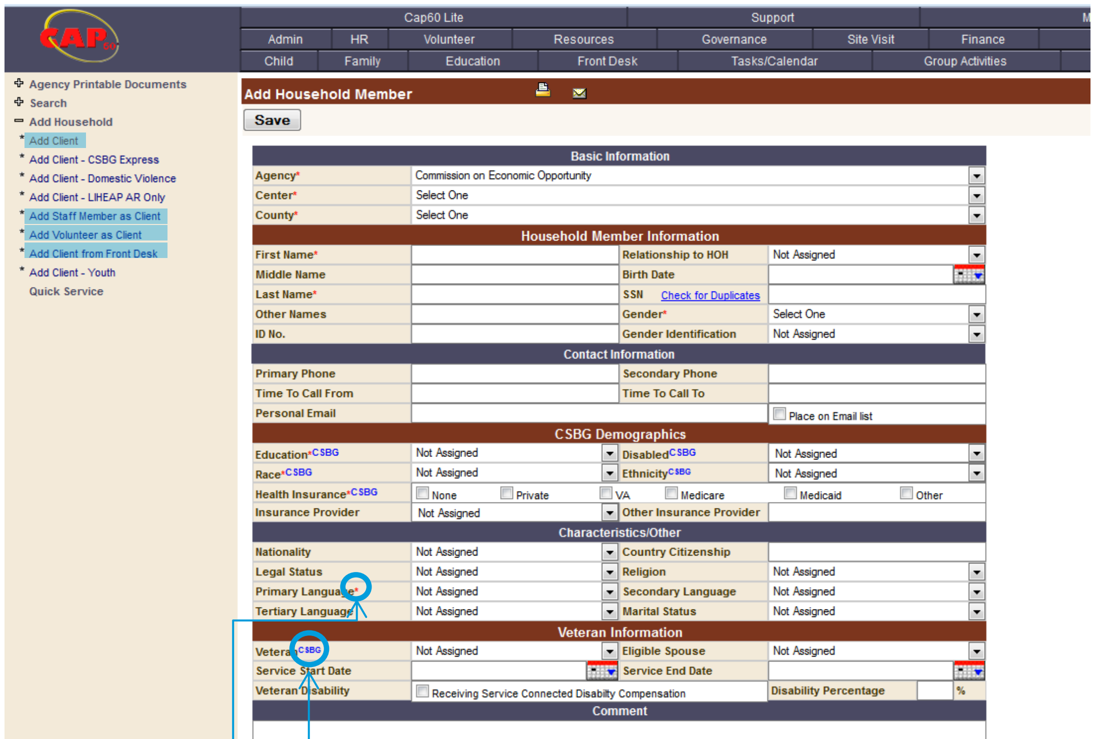
Once you find the person you are looking for, click on the PENCIL on the left side of their row and you will be taken to the FAMILY INFORMATION page.

Add Household*

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

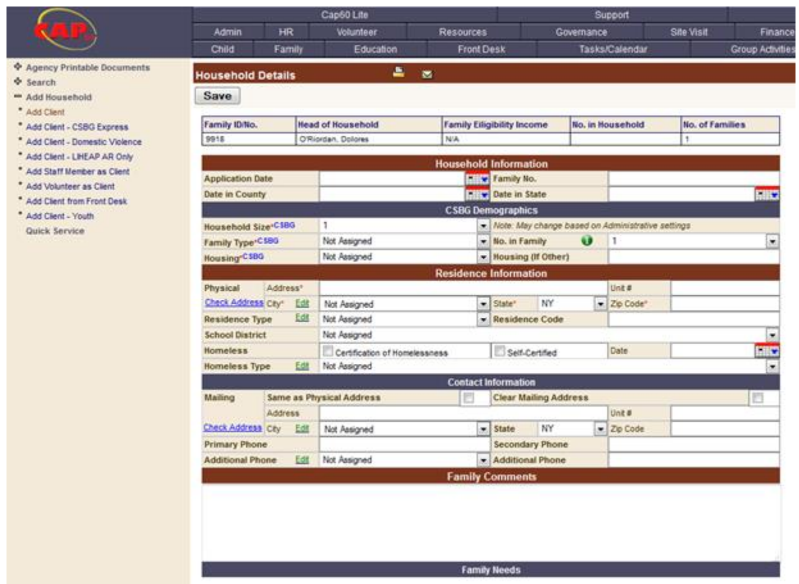
CAP → Add Household → choose the appropriate option.

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

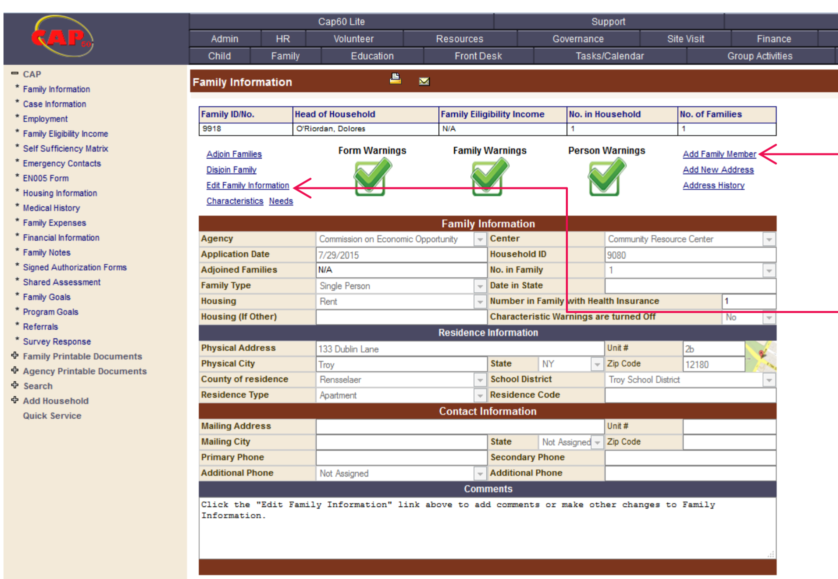


Household Details is the next page after “Add Client” is saved.

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 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**
- 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.