N-FOCUS CASE REGISTRATION

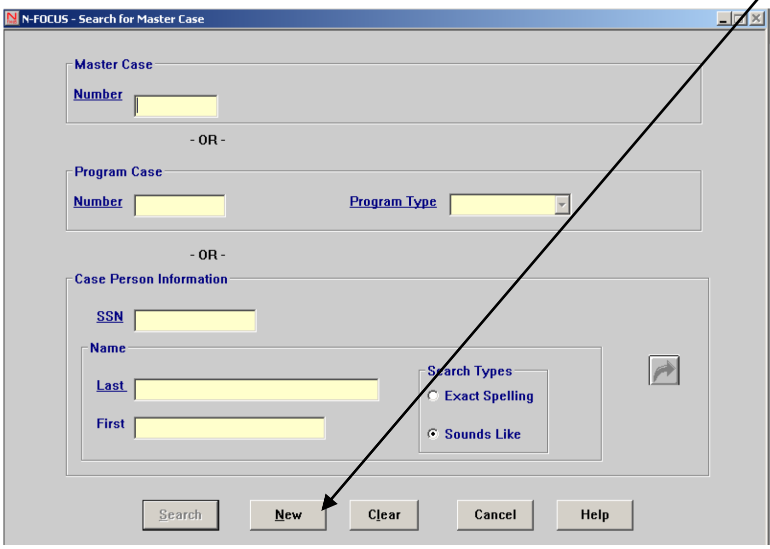
Table of Contents

CASE REGISTRATION

Create a New Master Case

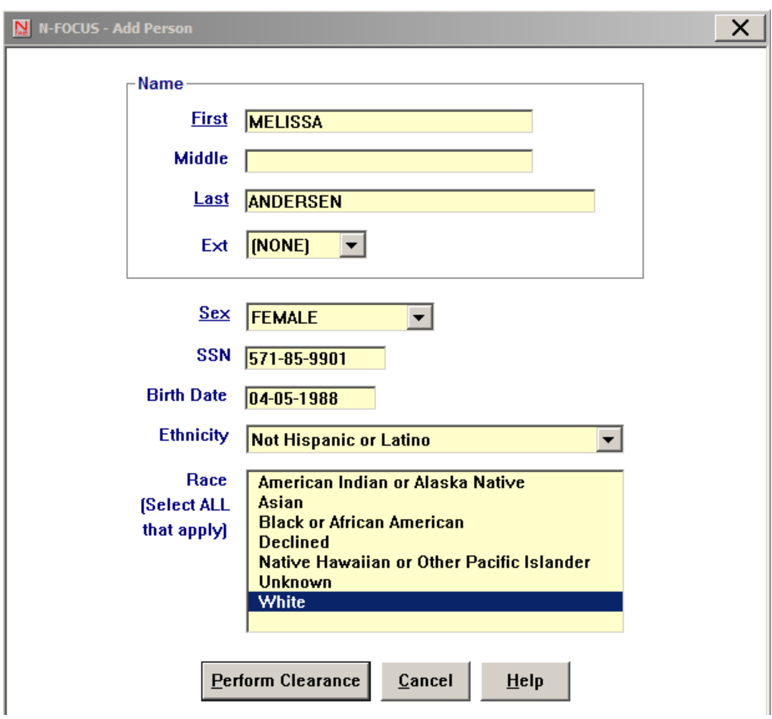
When a family does not have a Master Case already in N-FOCUS, you will need to create one for them.

1. On the *Main Menu*, select the *Master Case* icon.
2. On the *Search for Master Case* window, select the *New* push button.

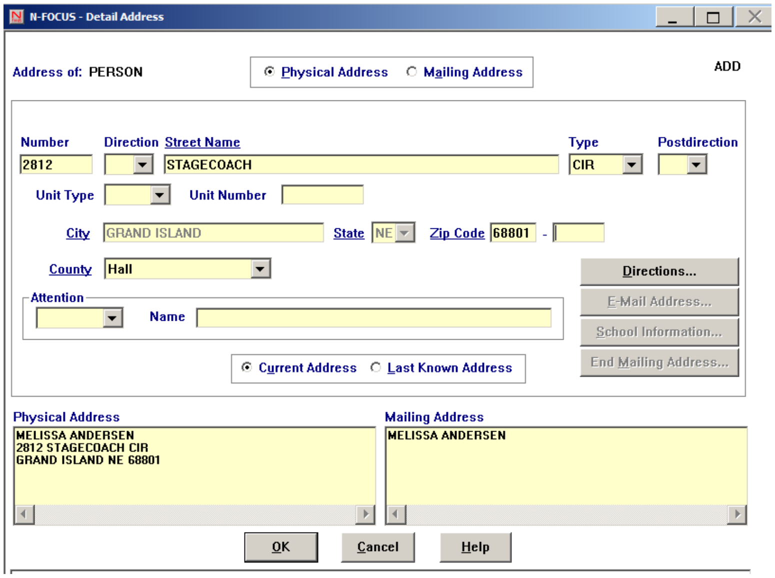


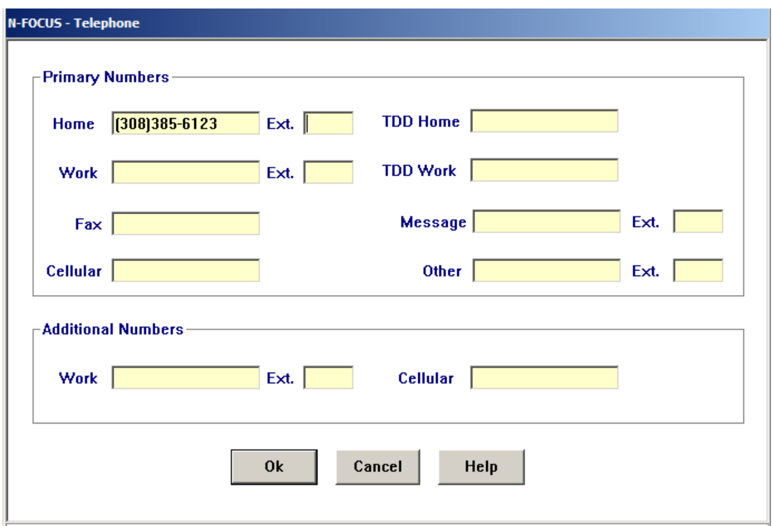
Result: The *Add Person* window will appear.

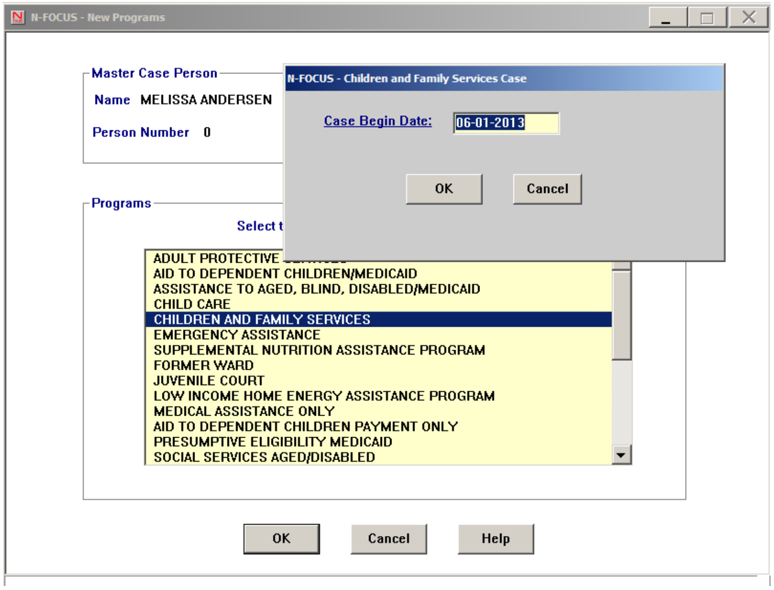
3. Enter all information available for the mother of the family as she will be the Master Case Name. (If a mother is not available, enter the father's information first).

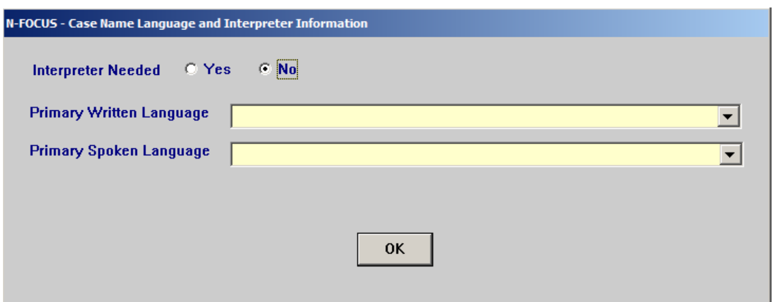


4. Select *Perform Clearance*.
5. Continue entering information as windows appear (*Address*, *Telephone*, *Add CFS Case*, and *Language*)

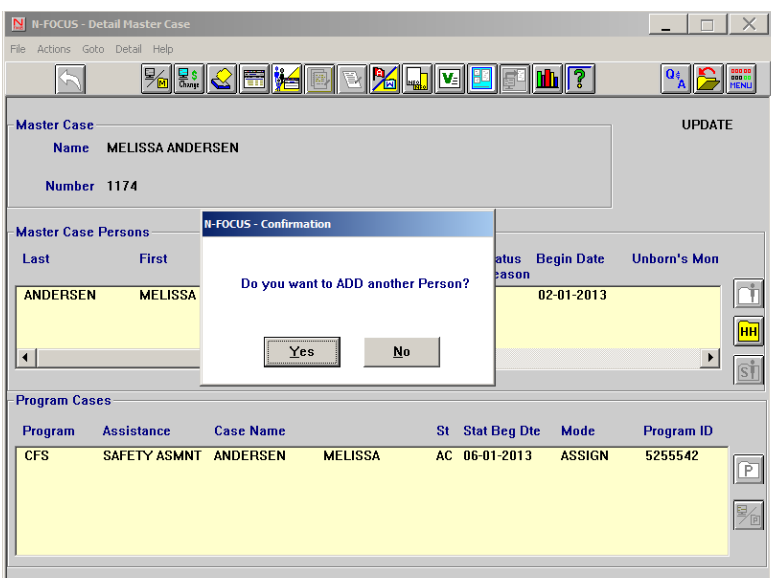




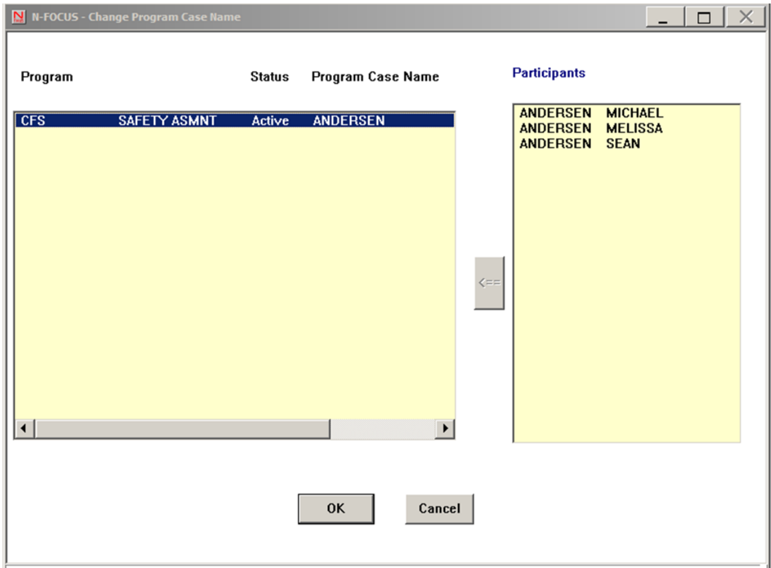




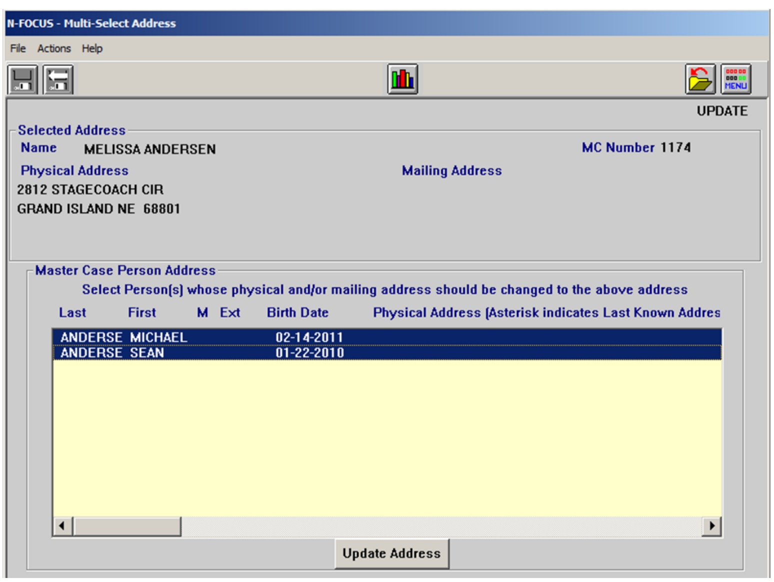
6. You will be provided a Master Case Number and the option to add another person into the Master Case. Continue doing this until everyone living in the home is entered into the Master Case.



Note: On the *Change Case Name* window, only select this if you want to change the case name. The mother's name should be the case name and if you entered her first, it will be fine.



7. After entering adding all household members to the Master and Program Cases the *Multi-Select Address* window enables.
8. Highlight other Master Case Persons whose physical address is the same and select *Update Address.*

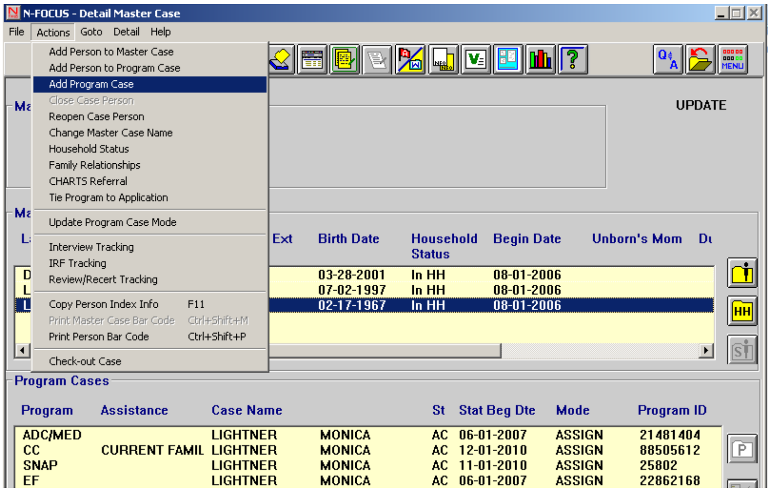


9. *Save and Close.*

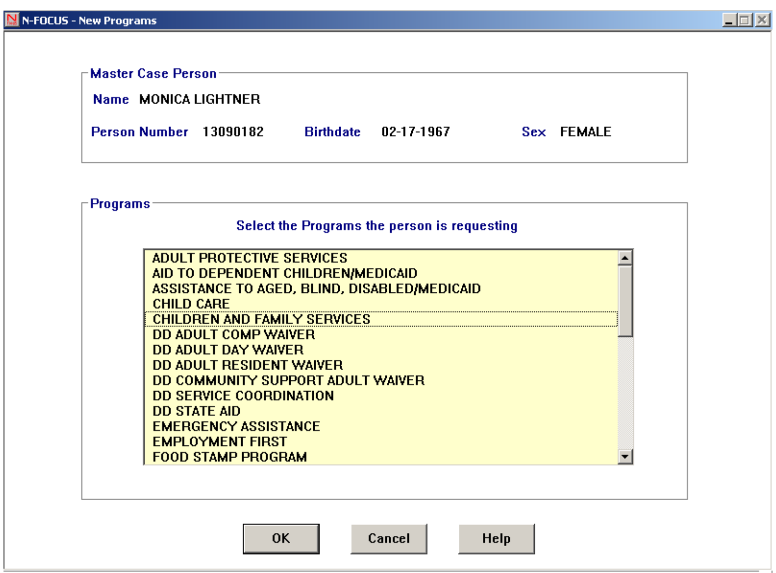
Results: You are returned to the *Detail Master Case* window.

Add a Children and Family Services Program Case to an Existing Master Case

1. On the *Detail Master Case* window, highlight the mother's name from the *Master Case Persons* group box.
2. Select *Actions* on the *Menu* bar.
3. Select *Add Program Case*.

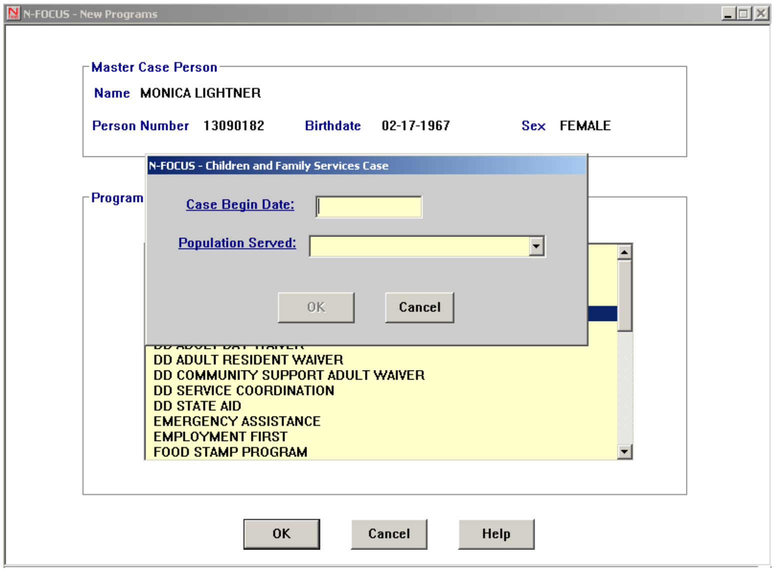


4. The *New Programs* window appears.
5. Highlight the *Children and Family Services* option on the *New Programs* window.

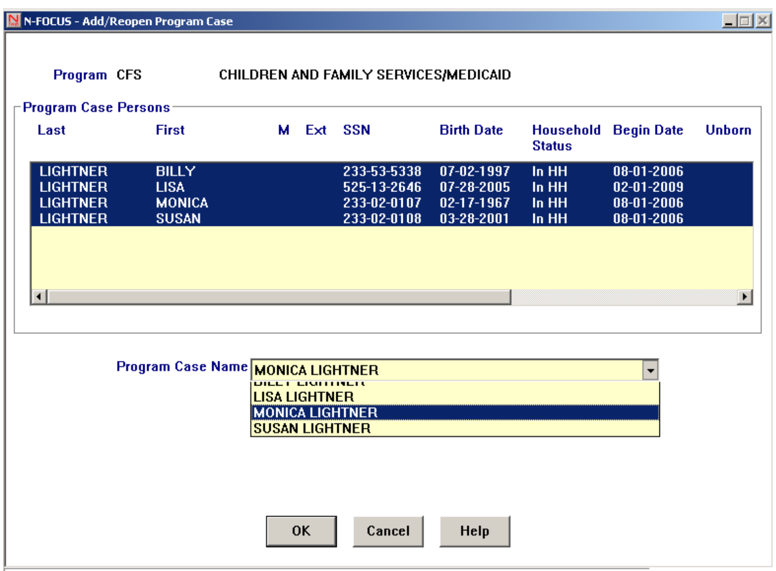


6. Select *OK*.
7. Enter the case begin date. Once saved, date will default to first of month due to benefit regulations.

8. Select *Child/Abuse/Neglect* from the Population Served from the drop-down list.



9. Select the *OK* push button.
10. Select *OK* again.
11. The *Add / Reopen Program Case* window appears.

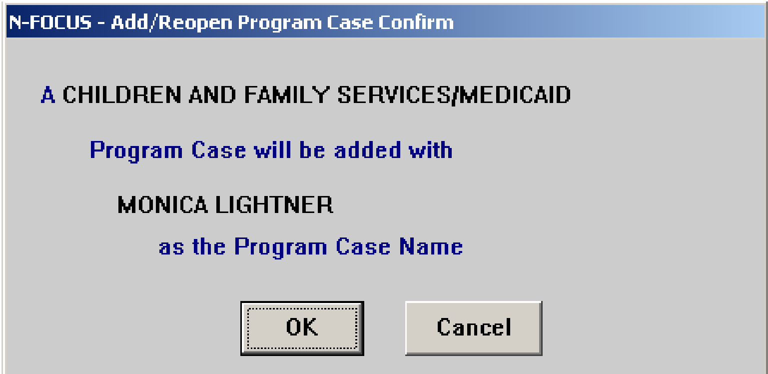


12. Highlight **all of the people** in the person's box.

13. Select the **mother** again from the *Program Case Name* drop-down box.

14. Select the *OK* push button.

15. Select the *OK* push button again.

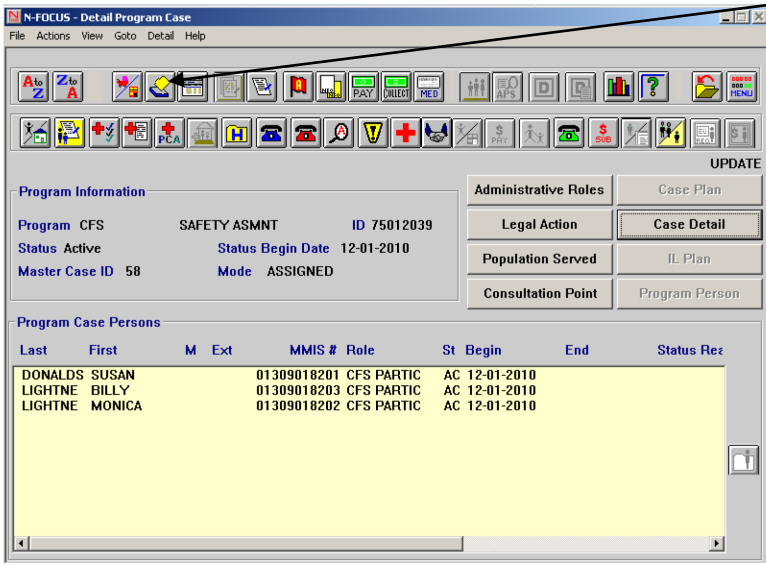


Program Case Assignments

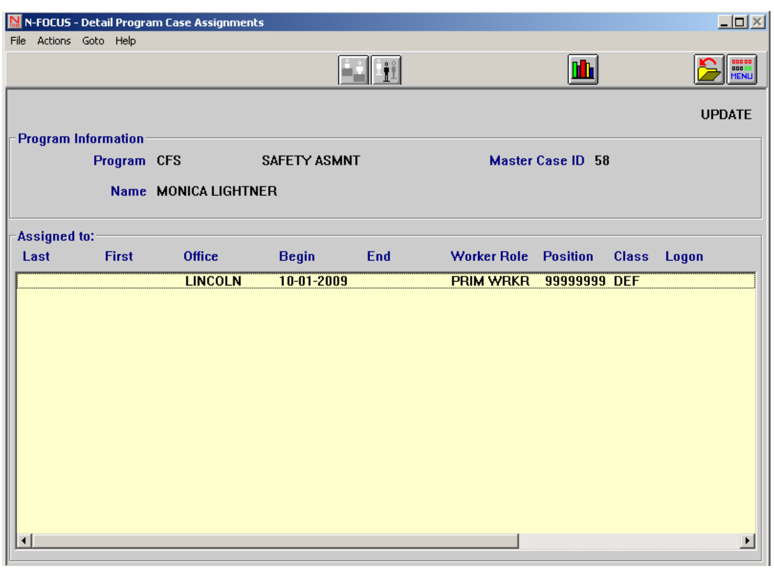
An assignment identifies who is responsible for the on-going management of a Program Case. **All** program cases must be assigned to a position. From the *Detail Master Case* window, select the *Assignments* icon  to see who is assigned to the non-CFS program cases. Contact that person to notify them that you are adding a CFS program case. Consult your supervisor as to how it is done in your office.

Assign yourself to the CFS Program Case

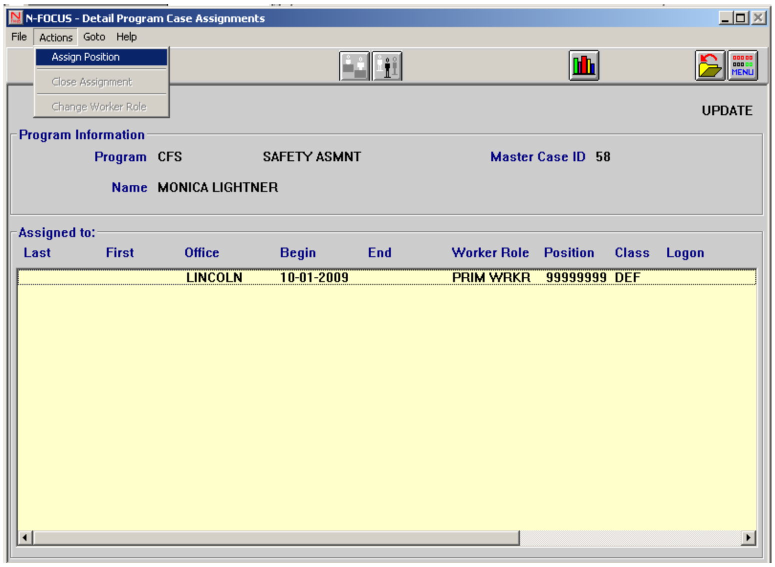
1. On the *Detail Program Case* window, select the *Assignments* icon. 



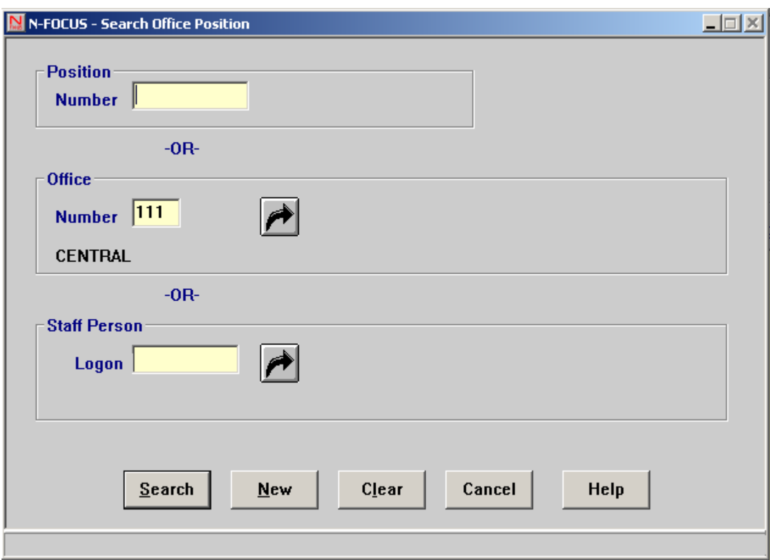
Results: The *Detail Program Case Assignments* window will appear.



2. Select *Actions* on the *Menu* bar.
3. Select *Assign Position*.



4. The *Search Office Position* window displays.



5. A search can be completed by entering a Position Number

   -OR-

   Entering an Office Number

   -OR-

   Entering your Staff Person Logon.

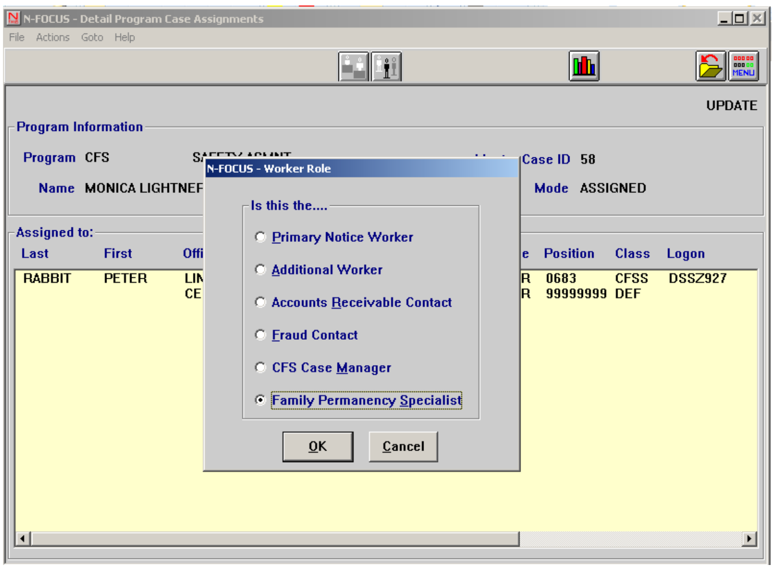
6. If a Search is completed on a Position Number, a confirmation window appears. If the information is correct, select the *Yes* button.

   -OR-

   If Search for an Office Number is selected, find the person's name to be assigned, highlight, and select the *Blue Arrow*. A confirmation window appears. If the information is correct, select the *Yes* button.

   -OR-

   If a Search for a Staff Person Logon is selected, you can type in the Logon ID and select *Search*, a confirmation window will appear. If this information is correct, select *Yes*. If you do not know the Logon ID, select the *Black Arrow*, type in the last name and first initial of the person, select *Search*, highlight the person's name and select the *Blue Arrow*. A confirmation window appears. If the information is correct, select the *Yes* push button.



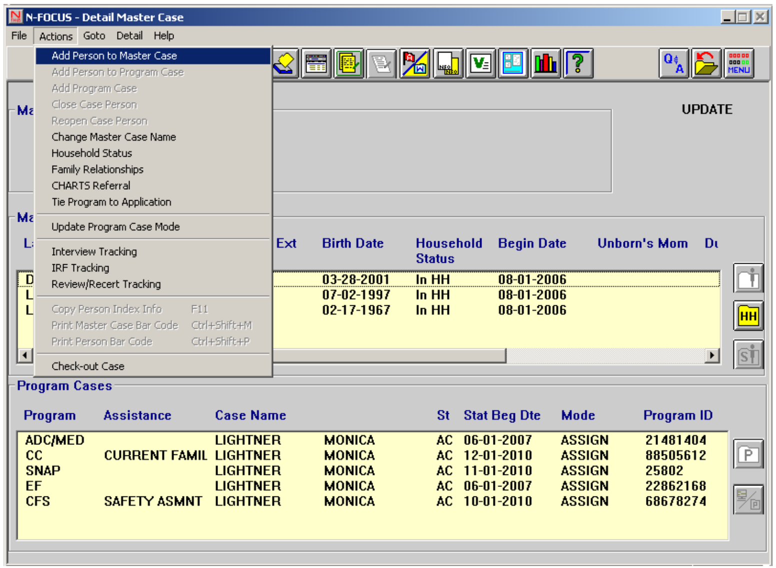
NOTE: If you are the first person assigned to the Program Case, you will be the Primary Notice Worker by default. The HHS worker is always the Primary Worker. If there is someone assigned as the Primary Notice Worker, you will receive the above *Worker Role* window and will select the appropriate role.

7. If you had to select a role, Select *OK*.
8. The program case is now assigned.

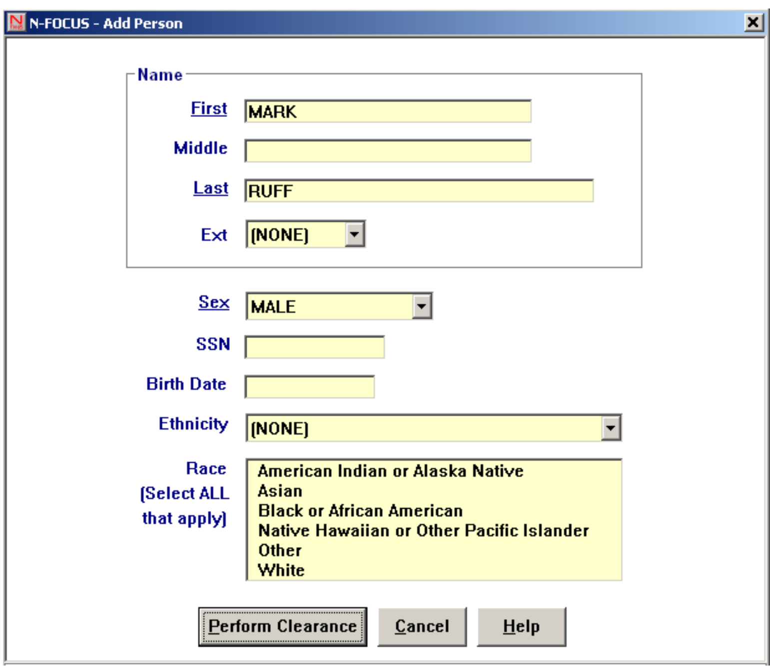
Remember: Assigning **all** program cases to a staff position is required before a Master Case can be checked-out to Expert System. **Children and Family Services** program cases can only be assigned from inside the program case.

Add Additional People to a Master Case

1. Return to the *Detail Master Case* window.
2. Select *Actions* on the *Menu* bar.
3. Select *Add Person to Master Case*.

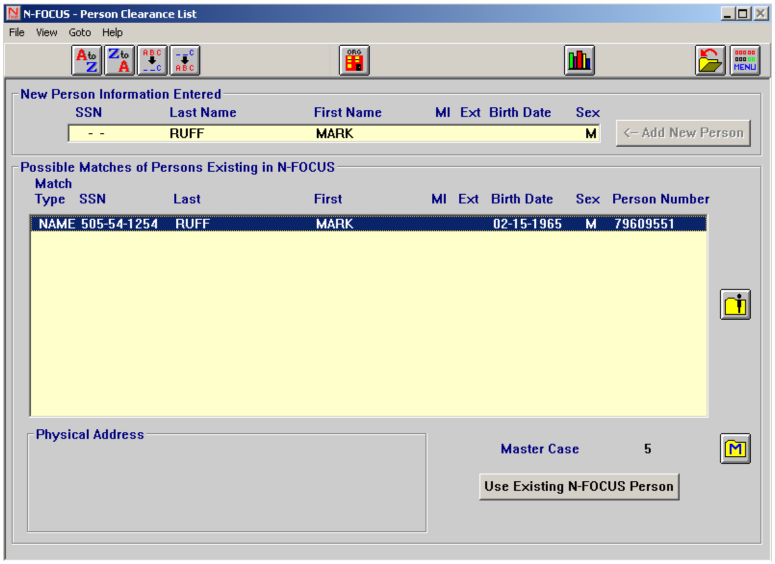


Result: The *Add Person* window displays.

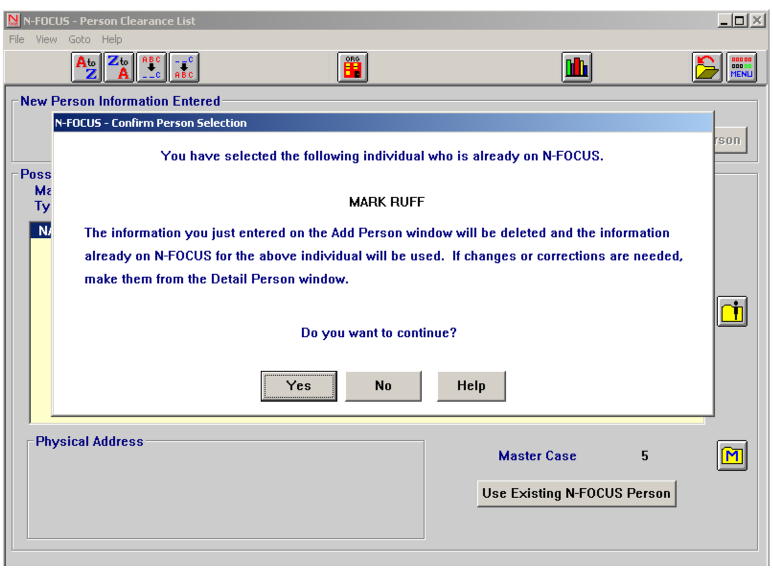


4. Enter all available data for the new Master Case Person. Minimally, Name, Sex, Birth Date, Ethnicity and Race, which is required before checking-out a case to Expert System.
5. Select the *Perform Clearance* push button.

6. If there is a possible match within N-FOCUS to the person you want to add, you will be taken to the *Person Clearance List* window. If there isn't a person that is a possible match, N-FOCUS will simply add the person to the Master Case and you will be at the *Detail Master Case* window.



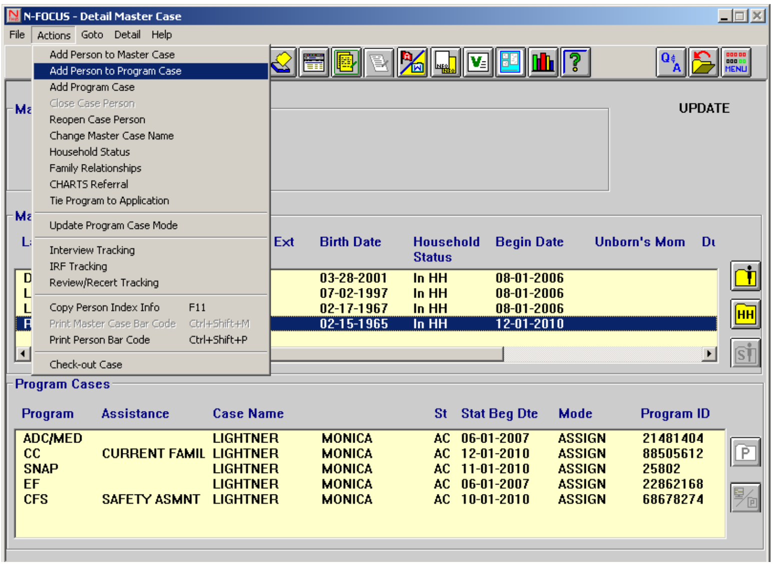
7. If you are provided a list of possible matches to the person you want to add, there will be two possible functions, *Add New Person* push button OR *Use Existing N-FOCUS Person* push button. If the person you want to add is already in N-FOCUS, highlight the name in the lower box and select *Use Existing N-FOCUS Person* on the bottom. If the people listed do not match the person you want to add, then highlight the person in the top box and select *Add New Person*. You want to make sure you are not duplicating a person already on N-FOCUS.
8. You will then get a confirmation pop-up making sure this is a person you want to use.
9. Select appropriate the answer.



10. You will then be prompted to add the date the person entered the MC.

Add Master Case Person to Existing Program Case

1. On the *Detail Master Case* window, highlight the name of the Master Case Person to add to a Program Case.
2. Select the *Actions* menu on the *Detail Master Case* window.
3. Select *Add Person to Program Case*.

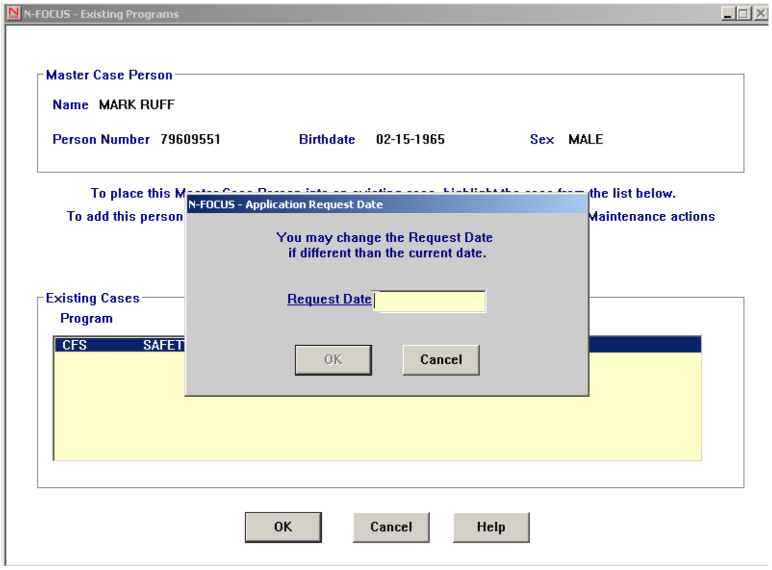


Result: The *Existing Programs* window displays.

4. If the person is not an out-of-household person, the *Existing Programs* window appears.

5. Highlight the Program Case to which you want to add your Master Case Person.

   Note: An *Application Request Date* pop-up window displays. The request date defaults to today's date but can be changed.



6. Enter date if different than the default.

   Note: You cannot set the person's begin date prior to the Master Case begin date.

7. Select *OK*.

   Result: The *Existing Program* window displays.

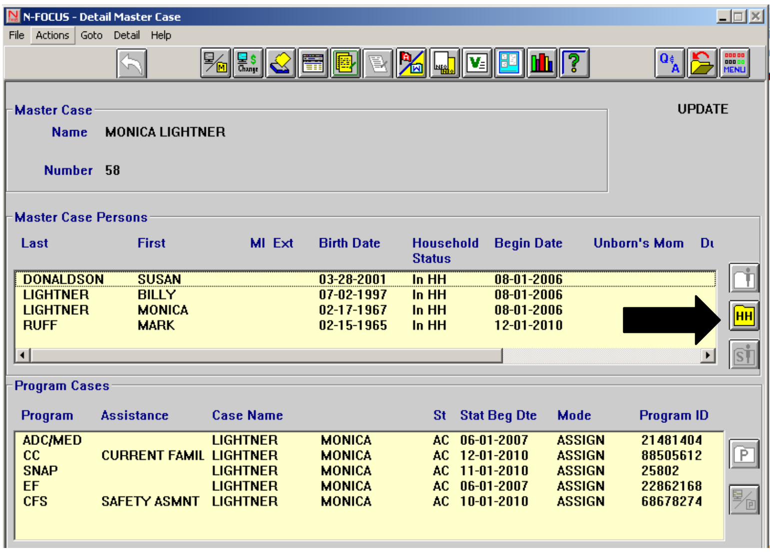
8. Select the *OK* push button on the *Existing Programs* window.

   Result: The *Detail Master Case* window displays with the selected person added to the selected program case(s). To see that the person has been added, you must go to the *Detail Program Case* window.

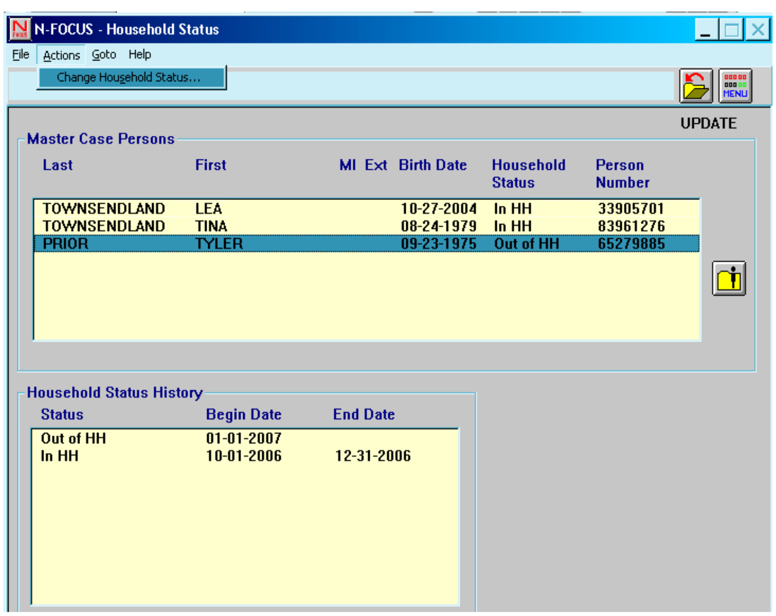
Household Status

HH Status Window
Persons not involved in any program case who are out of household, such as terminated unborn and absent parents, will not display on the *Detail Master Case* window. They will still be visible on the *Household Status* window.

To view history or update a person's household status, you may continue to Select *Household Status* from the *Detail Master Case* window *Actions* drop-down menu OR select the new *Household Status* icon.



Result: The *Household Status* window displays.
Note: Master Case persons not associated with any program case who is out of HH, will not display on the *Detail Master Case* window, but will display on the *Household Status* window. In this master case, for example, Tyler Prior is not involved with a program case and he is out of household, so he does not display on the *Detail Master Case* window, but his Household Status can be viewed or updated on the *Household Status* window (see next picture).

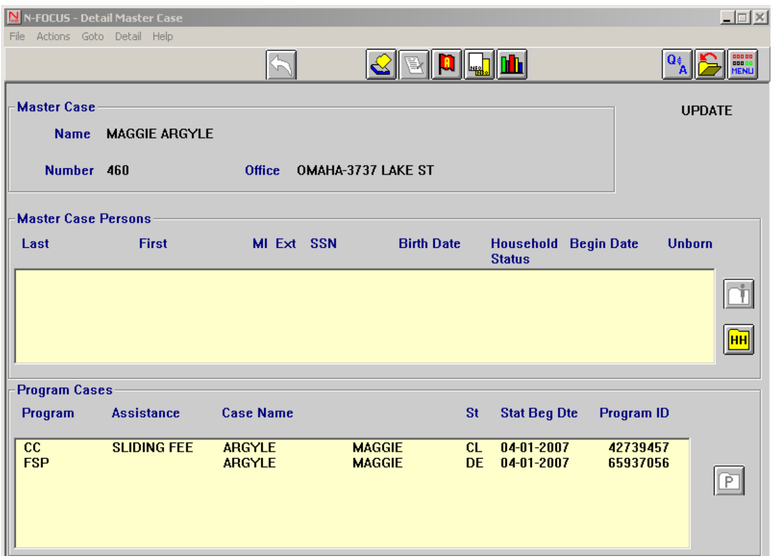


To Change Household Status:

1. Highlight the person.
2. Select *Change Household Status* from the *Actions* drop-down menu.

   Result: The *Change Household Status* window displays.
3. Choose the appropriate *Household Status* radio button.
4. Enter the Effective Date.
5. Select the *OK* button to return to the *Household Status* window.

   Note: Because persons no longer in any program case and out of household will no longer display on the *Detail Master Case* window, you may run across master cases where the *Master Case Persons* box is blank.



EX: In the picture to the left, Maggie Argyle is deceased and was the only person in the master case, so the Master Case Persons box is blank.

Administrative Roles

Types of Administrative Roles

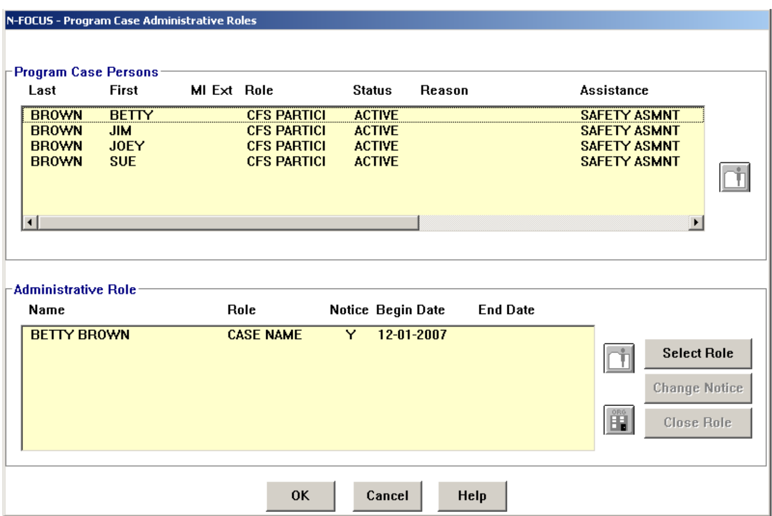
- Case Representative
- Emergency Contact

An Administrative Role provides a specific functional responsibility for a Program Case. Certain administrative roles are designated only to members of the specific Program Case (Primary Household Member, Principal Wage Earner). Other administrative roles are generally held by someone in neither the Program Case nor the Master Case (Case Representative, Emergency Contact). The administrative role of Payee is usually held by a member of the Program Case, but not always.

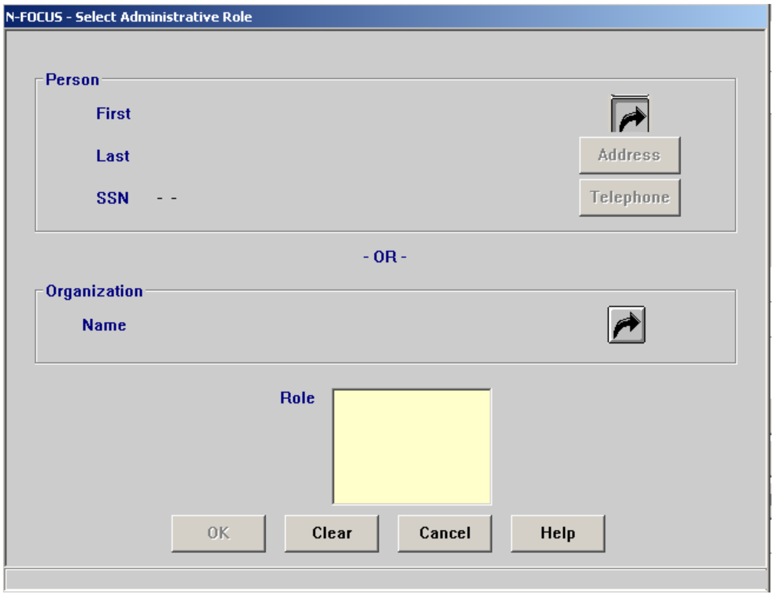
These steps illustrate how to update administrative roles. An organization may sometimes serve in an Administrative Role assignment (e.g., a Treatment Center as Food Stamp Case Representative). The process demonstrated here would be the same for an organization as for a person, except for the selection of Organization from the *Select Administrative Role* window.

Navigate to the *Detail Program Case* window.

1. Select the *Administrative Roles* push button.



2. Select the *Role* push button.



3. Select the *Out Select* arrow icon from the *Person* group box.
4. Enter the first and last name of the *Person* who will have the *Administrative Role*. Include as much information as possible to assist with person resolution issues that maybe encountered.
5. Select the *OK* push button.
6. On the Select *Administration Role* window, select the *Address* push button.
7. Enter the address.
8. Select *OK.*
9. If there are telephone numbers to enter, select the *Telephone* push button.
10. Enter any telephone number(s).
11. Select the *OK* push button.
12. Select the *Role* in the list box.

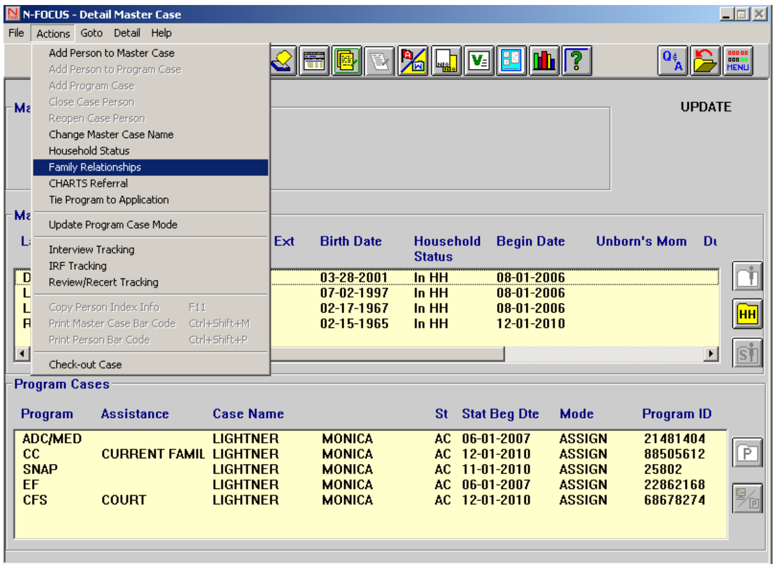
    Note: *Emergency Contact* is an administrative role in which a person not in the Master Case is listed as a contact on behalf of the client. Case Representative is a generic role including persons generally not in the Master Case who apply on behalf of other individuals or who serve as Guardians, persons serving as a power-of-attorney, conservators, etc. also fit into the administrative role of “Case Representative”.

13. Select the *OK* push button.
14. Select the *Yes* push button.
15. Select the *OK* push button.

Family Relationships

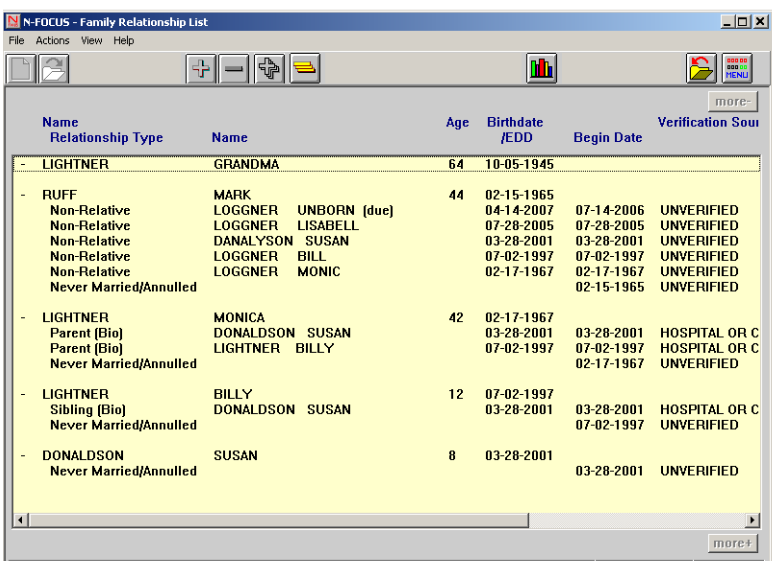
Viewing Family Relationships
Family Relationships and Marital Status must be completed for everyone in the Master Case. There are multiple documents to which this information automatically attaches, most notably the Court report. You will not be able to complete a Safety Assessment without having all of your family relationships completed.

1. On the *Detail Master Case* window, select *Actions*.
2. Select *Family Relationships*.



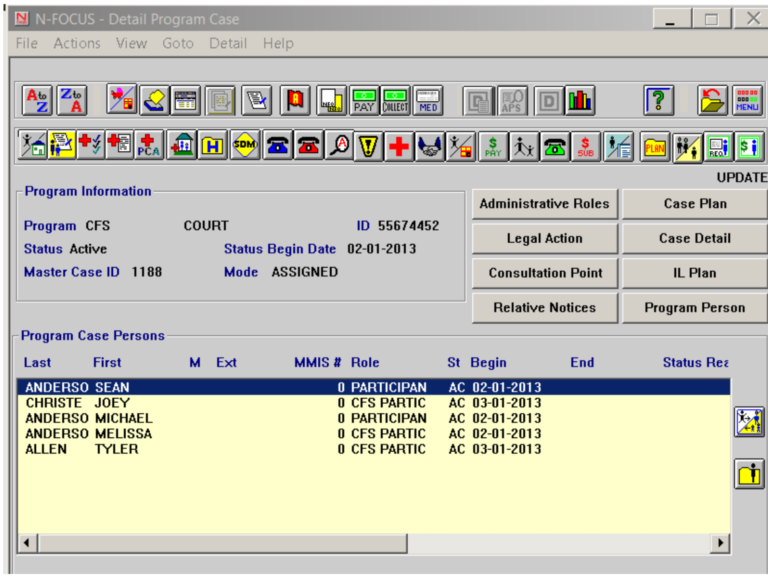
Family Relationships List

1. Review the list. Notice that there is missing information.
2. Proceed to Checking out a Master Case.

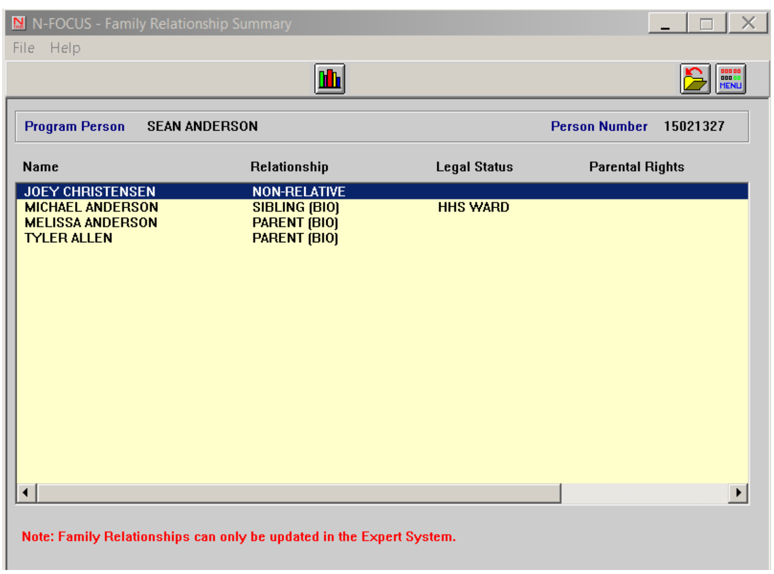


Family Relationship Summary on *Detail Program Case* window

1. On the *Detail Program Case* window, highlight the person on interest and select the *Family Relationship Summary* icon.



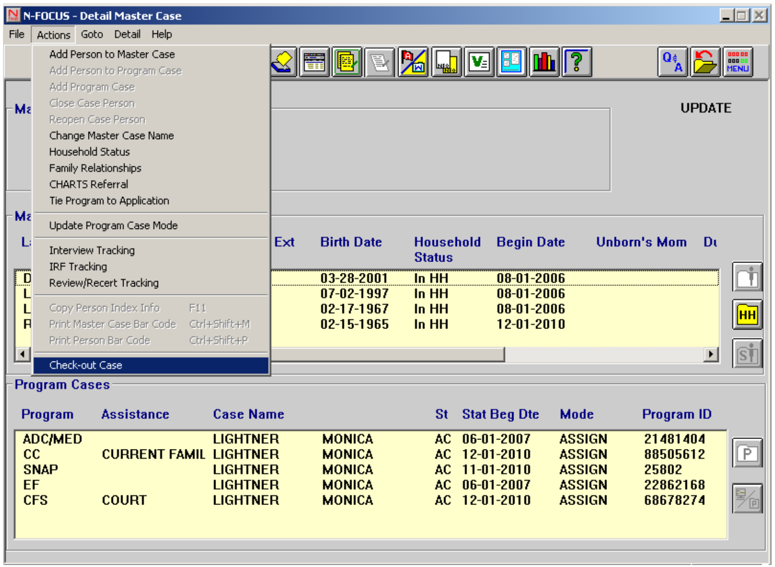
Results: The *Family Relationship Summary* window enables.
Note: Information about the Relationship, Legal Status, Parental Rights, Deceased and Person Number can be located on this window.



Checking-Out a Master Case

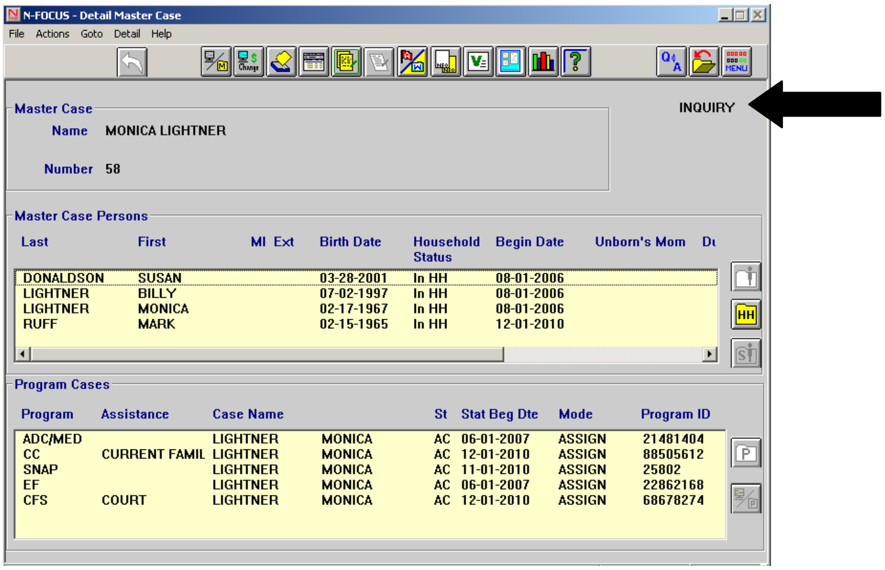
1. On the *Detail Master Case* window select the *Actions* menu.
2. Select *Checkout Case*.

   Note: Prior to checking out a case each person in the Master Case must have a race code and Birth Date documented. Also, all Program Cases must be assigned.



3. A Check-out was successful message appears.

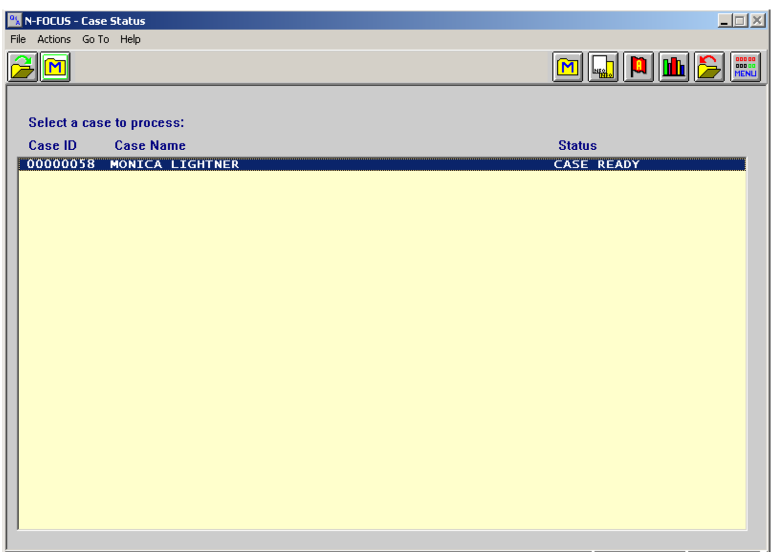
4. Select *OK* on the message.



Result: The *Detail Master Case* window displays.

Note: It no longer says “Update” in the top right-hand corner. Status has changed to “Inquiry”**.** This is because you have successfully checked out the case, and no one else can make any changes to it. Other people can make changes only when you check the case back in.

5. Click on the *Q & A* icon in the upper right hand corner of the window.



Result: The *Case Status* window displays with a list of all checked-out cases.

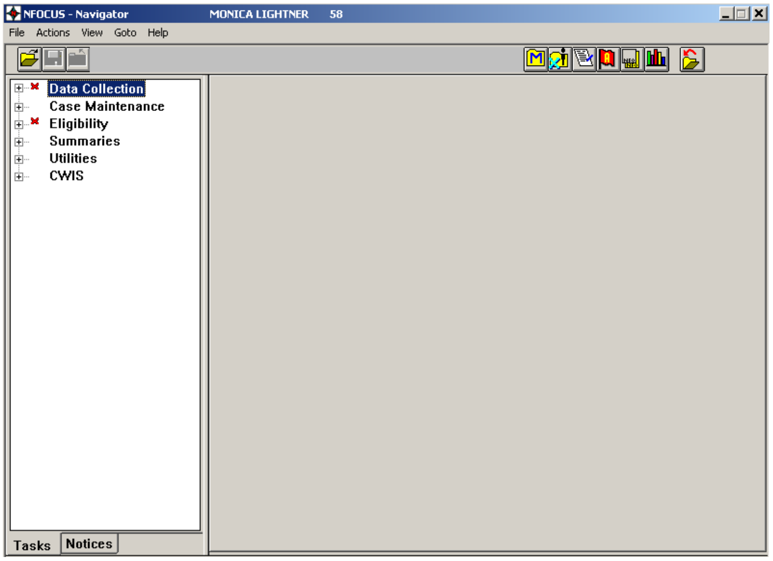
6. Select (highlight) the Master Case and double click or use the *Open* icon.

Result: The *Navigator* window displays.

The *Navigator* window

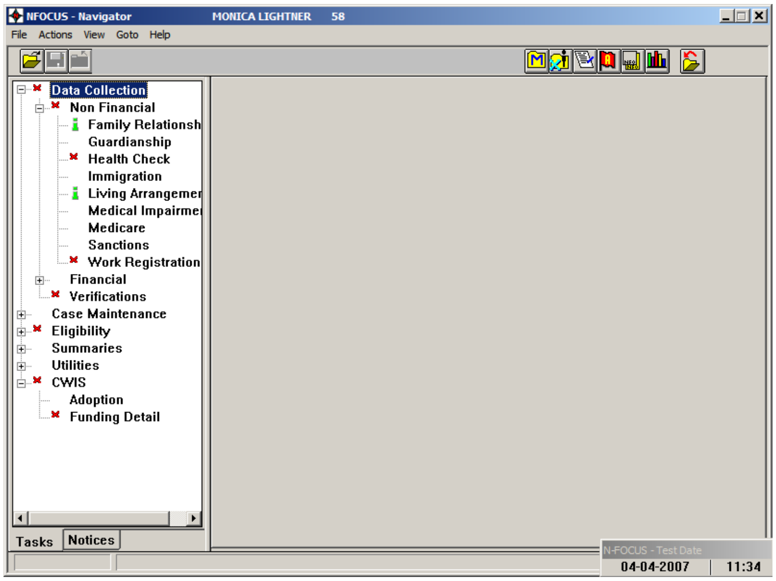
Warning: Don't Check Out or Check In a Master Case when N-FOCUS is down.

The *Navigator* window is the first window that will appear once a case is selected from the *Case Status* window.



A red "X "is indication that work is required in the field following the X.

Navigator window with the Tree List Expanded



A green "i" is indication that someone or the computer updated information.

- Click on the "+" sign next to Data Collection to expand.
- Click on the "+" sign next to Non Financial to expand.
- Click on the "+" sign next to CWIS to expand.

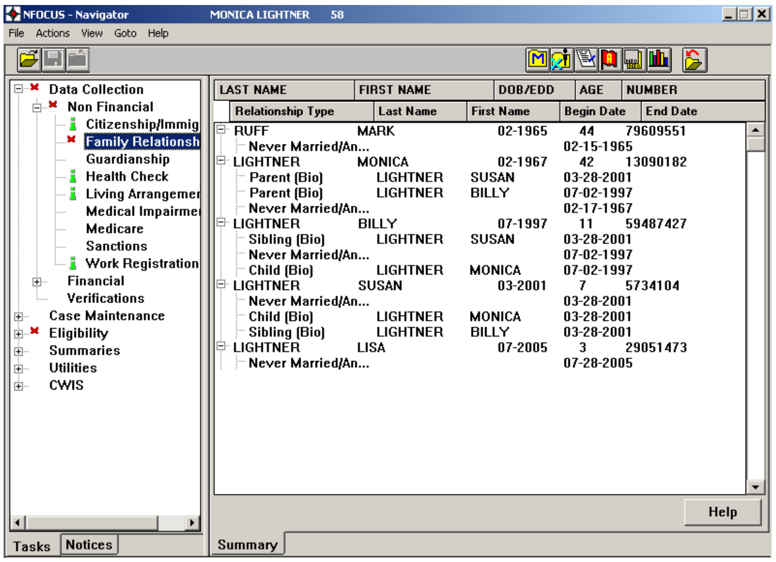
These are the items for which the CFS Specialist is responsible especially:

- Non Financial
  - Family Relationships
  - Guardianship
  - Health Check
  - Immigration
- CWIS
  - Adoption

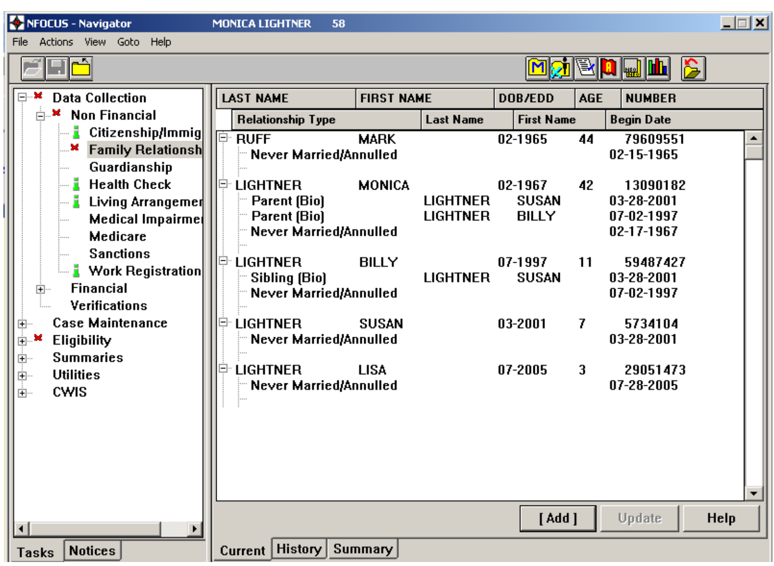
Processing Family Relationships

1. Single click on the *Family Relationships* task.
2. The *Family Relationships* task displays the summary of all relationships that have been established.

   Note: The Summary view is read only or Inquiry.



3. Double-click on the *Family Relationships* task.
4. The *Family Relationships* task displays with the Current Tab active and the *ADD*, *Update* push buttons bars available in the lower right side of the window.
5. Click on the *Add* push button.

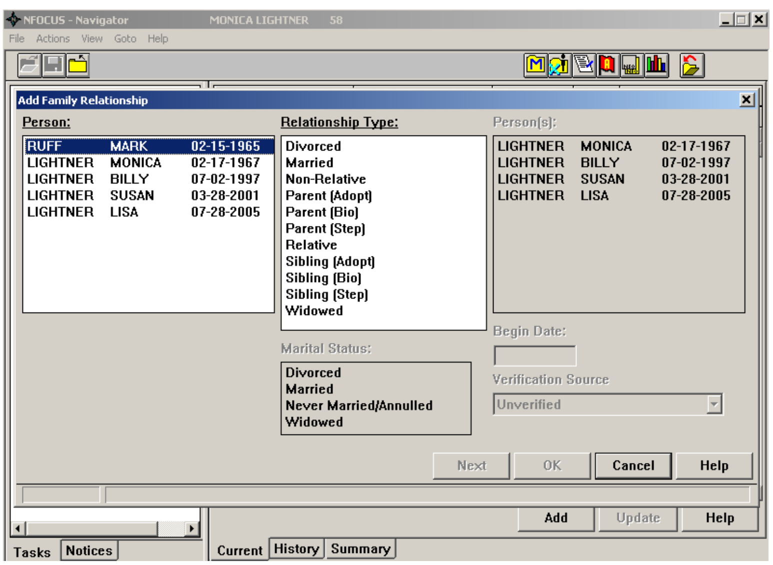


6. The *Add Family Relationship* window displays with the first person in the *Person* group box window highlighted.

   Note: Persons are listed chronologically by age, oldest to youngest. Each person must have Relationship Type and Marital Status.

Family Relationships consist of:

- Parent (adoptive) of Child
- Parent (biological) of Child
- Parent (step) of Step Child
- Sibling Adoptive
- Sibling Biological
- Sibling Step
- Relative
- Non Relative
- Married
- Divorced
- Widowed



7. Select the Relationship type from the *Relationship Type* box.
8. Select the person the relationship is with from the *Person(s)* group box.

   Note: Multi selection is available in the *Person(s)* box.

9. Enter the Begin Date if enabled.

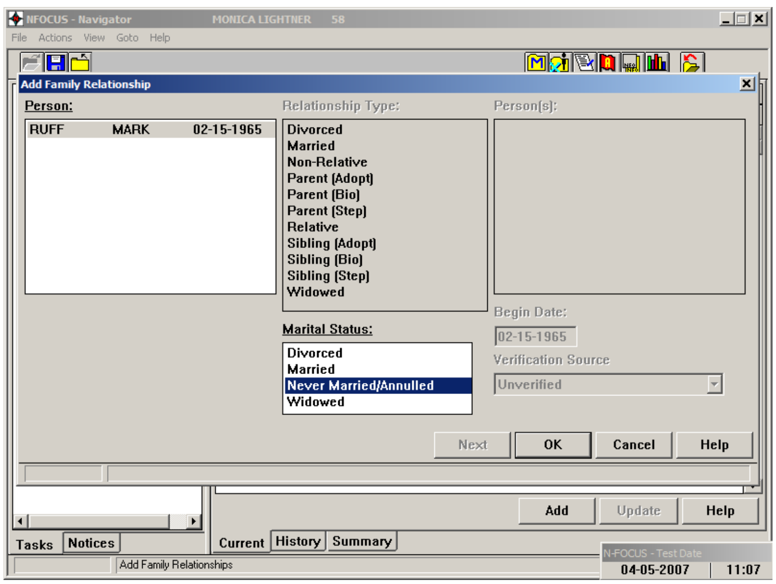
   Note: Biological relationships, Relative, and Non-Relative relationships will automatically have the Begin Date of the birthday of the youngest person in the relationship.

10. Select the *Next* push button. The relationship created is saved. If another relationship is required for the highlighted person, the person's name will remain in the *Person* box on the left side of the window. If all required relationships have been established, the person's name will be removed from the list and the next person's name will be highlighted.

    Note: Selecting the *OK* push button will return you to the previous window.

Navigation Tip: Continue documenting relationships until the *Next* push button is disabled.

11. When all relationships are processed, the *Next* push button will go gray and the *OK* push button will highlight. Back out of the window and answer *Yes* to the Save question and *Yes* to the return to the *Case Status* window.



Checking-in a Master Case

WARNING: If you do not check-in a Master Case by the end of the day you will lose all changes made to that case for the day!!

Note: When returning to the *Case Status* window from the *Navigator* window, your case will still be in Case Locked status. You will have to single click on the case line to return the Master Case to Case Ready. You will then be able to Check-In the case. If the case is in Case Locked status, the Check-In option will be disabled.

1. Select the *Close* icon on the *Navigator* window.

   Note: The message says "Close Navigator" rather than "Close Window."

   Result: The confirmation window displays asking, "Do you wish to return to the *Case Status* window?"

2. Select the *Yes* push button.

   Result: The *Case Status* window displays.

3. Select (highlight) the Master Case.
4. Select the *Actions* menu; select *Check-In Case*.

   Note: The Override Check-in option is available if you do not wish to save any information which was documented from the tree list tasks.

5. You are given a message to tell you that the check in was successful.

   Note: If it was not successfully checked in, you get an error message and should call the Help Desk, immediately!

6. Select the *Menu* icon to return to the Main Menu.

Navigation Tip: Determine the Master Case status when entering the Master Case. The *Detail Master Case* window will display the word **"INQUIRY"** in the upper right hand corner while a Master Case is checked out. It will display **"UPDATE"** when checked in.

It is possible to have more than one Master Case checked-out at any given time. This allows workers to look up/change information in Expert System on one case without checking-in another Master Case first.

When the check-out is complete, return to the *Main Menu* window and select the *Expert System* icon.