

CMS Release Notes 3.0.023

Build Number 305 - No change for browsers, no update action for CMS AIR clients.

New Features:

- 1. Conference Level Vendors:** Allows **ALL** Vendor types (utilities, transportation, phone/internet, etc.) to be created and maintained at the Conference level. Once the vendor has been added to the vendor file (by the Treasurer), caseworkers will be able to select any vendor (depending on vendor category selected) from a drop down list. This is an extension to the Housing-Conference feature we implemented in the last release giving conference the total control of maintaining and accessing their vendors
- 2. Abandoned Cases Worklist:** Located on the task pane. Conference officers will be able to review (3) case abandonment conditions:
 - a) Intake** - After Client Identification (client inquiry) but before a caseworker assigns the case or the places it in the unassigned cases worklist.
 - b) Unassigned** - Cases pending assignment in the unassigned cases worklist
 - c) Assigned** - Caseworker cases before advancing to the household tab in caseworker work flow

There are 2 abandoned cases setting managed at the diocesan level. One is how many days after a case has sit in one of the above statuses before it should be moved into the abandoned cases worklist. The other is how days should the case sit in the abandoned cases worklist before it is automatically deleted. All conferences should use this tool to reduce “case clutter”
- 3. Incomplete Status:** Is a new value displayed in the |Status| column of the client grid that informs the Intake Person that this client record is incomplete and should be investigated
- 4. Client Merge Date Stamp:** Displays the historically last casework action (by date) on each of the Primary and Match Client Records being merged. This last update date is helpful to the Records Manager to identify the client that had the last case activity
- 5. Casework > Situation #2 >Income:** For clarity, income descriptions have been changed to: Employment (Client) and “Employment (Other Residents)”
- 6. Support Button:** A new headline (top) button (left of Logoff button) is provided for accessing The Support Community website within CMS. This is an “in-app” feature and to return to CMS, where you exited, click the small red “Exit” button (top left of page)
- 7. Case Volume Report:** A new report is available for the Diocesan Development Officer. This report summarizes case volume, by conference, for 3 intervals: 30, 90 and 365 days for both the Current and Prior year based on a single date setting.