

FLOW FOR ADDING REPORT/PERSONS/RELATIONSHIPS:

RRRL – REPORT/REQUEST LIST

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CID1 – CENTRALIZED INTAKE DETAIL 1

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CID2 – CENTRALIZED INTAKE DETAIL 2

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RRD1 – REPORT/REQUEST DETAIL 1

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RRD2 – REPORT/REQUEST DETAIL 2

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RRD3 – REPORT/REQUEST DETAIL 3 (OPTIONAL SCREEN FOR ADDITIONAL TEXT)

On RRD2:

F12 on CAPS ID

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PERS – PERSON SEARCH

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PERL – PERSON LIST

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If person is known, select from PERL with an “S” to return to RRD2

If person is not known, press F11 to ADD

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PERD – PERSON DETAIL

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Once PERD is updated, press SHIFT+F9 to return to RRD2

On RRD2:

Select one person listed with “P” (primary) and the remaining family members with “R” (relation), press F10

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RELL – RELATIONSHIP LIST

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Make any changes to the relationship type based on who is displayed as the current primary

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Press enter to return to RRD2 (continue with this process, making each person on RRD2 a primary)

FLOW FOR CAPS UPDATES PRIOR TO D427 (FOSTER CARE REVIEW) DOCGEN:
(The D427 pulls information from these screens and much of it is not listed on the question page.
That is why it is important to verify the information is current before running the document.)

ACTD – ACTIVITY DETAIL

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ADDD – ADDRESS DETAIL

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CLID – CLIENT DETAIL

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CREI – CPS REMOVAL ELIGIBILITY INFORMATION (updated by IVE Unit staff)

|

CRTD – COURT DETAIL

|

EDHL – EDUCATION HISTORY

|

EMPL – EMPLOYMENT HISTORY

|

GARD – GUARDIANSHIP DETAIL

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IARD – INITIAL ASSESSMENT & REVIEW DETAIL (make sure permanency goal on most
current review is still accurate; if not, add a PGR (Progress Review) to update.

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ICWD – ICWA DETAIL

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MDTD – MEDICATION/TREATMENT DETAIL

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MMHD – MEDICAL/MENTAL HEALTH DETAIL

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PERD – PERSON DETAIL

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PLAD – PLACEMENT DETAIL

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PLSH – PLACEMENT STATUS HISTORY

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PPHD – PERMANENCY PLAN HEARING DETAIL

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RELL – RELATIONSHIP LIST

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SPND – SPECIAL NEEDS DETAIL

FLOW TO ADD PERSON/CLIENT/SERVICE INFORMATION:

PERS – PERSON SEARCH

PERL – PERSON LIST

PERD – PERSON DETAIL

|

RELL – RELATIONSHIP LIST

RELD – RELATIONSHIP DETAIL

|

ADDL – ADDRESS LIST

ADDD – ADDRESS DETAIL

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AXED – ASSIGNMENT/TRANSFERS DETAIL

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CLID – CLIENT DETAIL

|

ICWD – ICWA DETAIL (required for clients with “AI” or “AN” ethnicity on CLID)

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IARL – INITIAL ASSESSMENT AND REVIEW LIST

IARD – INITIAL ASSESSMENT AND REVIEW DETAIL

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SERL – SERVICES LIST

SERN – SERVICE DETAIL: NON-PAYABLE (REMOVAL SERVICE CODE = SEMRM)

----CREI – CPS REMOVAL ELIGIBILITY INFORMATION (updated by IVE unit)

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PPHL – PERMANENCY PLAN HEARING LIST

PPHD – PERMANENCY PLAN HEARING DETAIL

|

CRTL – COURT LIST

CRTD – COURT DETAIL

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CPHL – CLIENT PLACEMENT HISTORY LIST

PLAD – PLACEMENT DETAIL, or

ADOD – ADOPTION DETAIL, or

GARD – GUARDIANSHIP DETAIL

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SERL – SERVICES LIST

SERN – SERVICE DETAIL: NON-PAYABLE (for any non-payable services), or

SERP – SERVICE DETAIL: PAYABLE (for any payable services)

----SSJD – SUPPLEMENTAL SERVICE JUSTIFICATION (only if entering certain services)

FLOW TO ADD TRANSITIONAL LIVING SERVICES:

(Transitional living services can only be entered by workers with a transitional living worker staff type. Clients must either be assigned or shared with a worker with these staff types prior to entering the services.)

SERL – SERVICES LIST

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SERN – SERVICES DETAIL: NON-PAYABLE, or

SERP – SERVICES DETAIL: PAYABLE

To add Transitional Living Plan:

SERL – SERVICES LIST

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SERN – SERVICES DETAIL: NON-PAYABLE (SERVICE CODE = SBSAA)

SERN – SERVICES DETAIL: NON-PAYABLE (SERVICE CODE = SBSAP)

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BSAS – BUILDING SKILLS PLAN SUMMARY

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BSAE – BUILDING SKILLS EVALUATION

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Attach transitional living plan document as a note in DocGen.

FLOW FOR ADDING TRUST ACCOUNT EXPENDITURES/VIEWING HISTORY:

To add trust account expenditures:

TAEL – TRUST ACCOUNT EXPENDITURE LIST

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TAED – TRUST ACCOUNT EXPENDITURE DETAIL

To view trust account history:

TAHL – TRUST ACCOUNT HISTORY LIST

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TAHD – TRUST ACCOUNT HISTORY DETAIL