



# DYS\_ARD – Manage DYS ARD Scheduled Review Summary Job Aid

## Users

### **Manage the ARD Scheduled Review Summary** (Edit, Copy,)

- DYS Review Coordinator
- DYS ARD Reviewer

### **Delete the ARD Scheduled Review Summary** (Delete)

- DYS ARD Reviewer

### **Access and View the ARD Scheduled Review Summary** (Read-only)

- DYS Director/Assist Director
- DYS Client Manager
- DYS Client Manager Supervisor

## Process

These Job Aid tables describe the actions needed to view and update information in the Summary section for a DYS Case including *Copying an ARD Scheduled Review* and *Deleting an ARD Scheduled Review*.

Refer to the Job Aids listed below for details on completing the individual sections contained in the *ARD Scheduled Review* page:

- *DYS\_ARD – Access and View DYS ARD Scheduled Review Child /Youth*
- *DYS\_ARD – Manage DYS ARD Scheduled Review Invitees*

## **Related Job Aids:**

- *DYS\_ARD – Manage DYS ARD Scheduled Reviews* on accessing and adding a new ARD Scheduled Review.

## Introduction

- ARD is the Administrative Review Division.

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## **Access and View the ARD Scheduled Review Summary**

Steps/Output	Screenshot
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# DYS\_ARD – Manage DYS ARD Scheduled Review Summary Job Aid

Refer to the *DYS\_ARD – Manage DYS ARD Scheduled Review Job Aid* for details on locating the desired DYS ARD Scheduled Review.

On the *ARD Scheduled Reviews* page:

Navigate to the *Summary* section by clicking the links in the left navigation panel or using the scroll bar at the right of the page.

County/Region*	Caseworker/Client Manager*	Family Name	Case ID
Western	Leslie Navarro	Dujmuraskamz Yedfssacouj	1832144

Scheduled Date	Scheduled Time	Reviewer*	Date Invitation Sent
5/19/2020	10:30 AM	Cgi Qa Test5	5/4/2020

Review Location*	Modified By
test	Cgi Qa Test5 on 5/4/2020

Child/Youth						
Name	Client ID	DOB	Gender	State ID	Involvement Start Date	Involvement End Date
Ozjgtanimy Bgstkjartjl Xidsaadmbw	2251729	06/17/2000	Male	Y408748	10/1/2012	4/19/2013



The *Summary* section displays.



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## Edit the ARD Scheduled Review Summary

- Only a worker with the DYS ARD Reviewer profile will be able to update the **Cancel** fields including *Cancel Review*, *Cancel Type*, *Cancel Reason*, and *Cancel Comments*.
- The Summary panel includes the following *Actions*:
  - Copy ARD Scheduled Review
  - Delete ARD Scheduled Review

Steps/Output	Screenshot
<p>In the <i>Summary</i> section:</p> <ol style="list-style-type: none"> <li>1. Revise information as needed in any editable field.</li> </ol>	
<p>The <b>Cancel Review</b> toggle is used to hide or display the cancelled review information.</p> <ol style="list-style-type: none"> <li>2. To display the ARD Scheduled Review canceled fields, set the <b>Cancel Review?</b> toggle to <i>Yes</i>. <p><b>Note:</b> By default, the <b>Cancel Review</b> toggle will be set to <i>No</i> and the canceled information is hidden.</p> </li></ol>	



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The **Cancel Review** fields display.

- To cancel an ARD Scheduled Review, complete the required fields and as many other fields as necessary.

**Note:**

- Only workers with the *DYS ARD Reviewer* profile will be able to cancel an ARD Scheduled Review.
- If the *ARD Scheduled Review* is linked to an *ARD Review*, you will not be able to cancel the ARD Scheduled Review.

The screenshot shows the 'ARD Scheduled Review - Ozjgtanimy Bgstkjartjl Xidsaadmbw - 5/19/2020' summary page. The 'Cancel Review\*' section is highlighted with a red box. It contains the following fields:

- Cancel Type\***: Radio buttons for '6-month' and 'Permanency'.
- Cancel Reason\***: A dropdown menu currently showing 'Select...'.
- Cancel Comments**: A text input field.

Other visible fields include County/Region (Western), Caseworker/Client Manager (Leslie Navarro), Family Name (Djymwaskamz Vedfssacugv), Case ID (1832144), Scheduled Date (5/19/2020), Scheduled Time (10:30 AM), Reviewer (Cgi Qa Test5), Date Invitation Sent (5/4/2020), Review Location (test), and Modified By (Cgi Qa Test5 on 5/4/2020). A 'Save' button is at the bottom right.

If the **Cancel Review?** toggle is changed to *No* and there is information in the **Cancel Review?** fields:

A *Warning!* pop-up window displays:

- Click **Yes** to continue and delete the Cancel information or **No** to keep the Cancel information.

The screenshot shows the same ARD Scheduled Review summary page as above, but with a 'Warning!' pop-up window overlaid. The pop-up contains the following text:

**Warning!**  
Changing the Cancel Review? toggle to "No" will delete all information from the Cancel Type, Cancel Reason and Cancel Comments. Do you wish to continue?

The pop-up has 'No' and 'Yes' buttons. The 'Cancel Review?' toggle in the background is now set to 'No'. The 'Cancel Reason' dropdown is now populated with 'No Agency Staff'. A table at the bottom shows the child/youth information:

Name	Client ID	DOB	Gender	State ID	Involvement Start Date	Involvement End Date
Ozjgtanimy Bgstkjartjl Xidsaadmbw	2251729	06/17/2000	Male	Y408748	10/1/2012	4/19/2013

A 'Save' button is at the bottom right.



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After completing all changes to the *Summary* section of the ARD Scheduled Review:

5. Click the **Save** button at the bottom of the page to save the changes to the *ARD Scheduled Review* page.

A *Save Successful* pop-up window displays.

The screenshot shows the 'ARD Scheduled Review' form in the Colorado Department of Human Services system. The form includes fields for Scheduled Date (5/19/2020), Scheduled Time (10:30 AM), Reviewer\* (Cgi Qa Test5), and Date Invitation Sent (5/4/2020). Below these are fields for Review Location\* (test), Modified By (Cgi Qa Test5 on 5/4/2020), and Cancel Review\* (Yes/No buttons). A Cancel Type\* dropdown is set to '6-month', and the Cancel Reason\* is 'No Agency Staff'. A 'Save' button at the bottom right is highlighted with a red box.

Child/Youth						
Name	Client ID	DOB	Gender	State ID	Involvement Start Date	Involvement End Date
Ozjgtanimy Bggtkjarij Xidsaadmbdw	2251729	06/17/2000	Male	Y408748	10/1/2012	4/19/2013

In the *Save Successful* pop-up window:

6. Click **OK** to continue.

The screenshot shows the same 'ARD Scheduled Review' form as above, but with a 'Save Successful' pop-up window overlaid. The pop-up window contains the text 'ARD Scheduled Review Details saved successfully.' and an 'OK' button, which is highlighted with a red box.



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7. Continue and complete each of the sections within the *ARD Scheduled Review* page based on your security profile.


**Note:** Refer to the Job Aids listed in the **Process** section on Page 1, for details on completing the individual sections contained in *ARD Scheduled Review* page.



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## Copy the ARD Scheduled Review

- The **Copy ARD Scheduled Review** Action is used to copy an ARD Scheduled Review from a DYS Case making a duplicate for the same Client and attaching it to the same DYS Case.
- The **Cancel Type, Reason, and Comments** will not be copied.
- Each invitee that was invited will be copied.
- The copied ARD Scheduled Review will not be linked to an ARD Review.
- If the worker has a DYS ARD Reviewer profile, the **Reviewer** will default to the logged on worker. You will be able to change the Reviewer to any active worker with the DYS ARD Reviewer profile via auto complete.

Steps/Output	Screenshot
<p>In the <i>Summary</i> section:</p> <ol style="list-style-type: none"> <li>1. Click the <b>Actions</b> drop-down arrow in the <i>Summary</i> banner.</li> <li>2. Select the <b>Copy ARD Scheduled Review</b>.</li> </ol> <p>This opens the <i>Copy ARD Scheduled Review</i> pop-up window.</p>	



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In the *Copy ARD Scheduled Review* pop-up window:

3. Complete the required fields and enter as much additional information as is available.

**Note:** There will be a confirmation message at the top of the pop-up window to verify copying the correct ARD Scheduled Review.

When all fields are completed:

4. Click **Add** to copy the ARD Scheduled Review for the same Client or **Cancel** to close without saving.

A *Confirm Add ARD Scheduled Review* pop-up window displays.

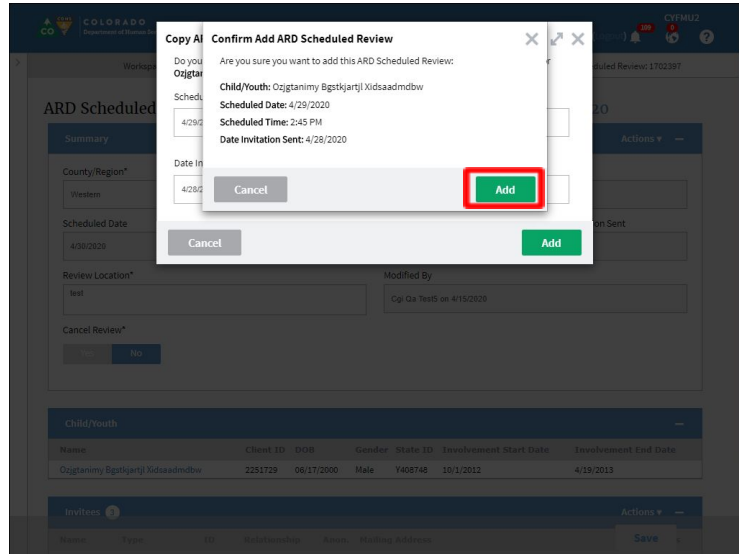




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In the *Confirm Add ARD Scheduled Review* pop-up window:

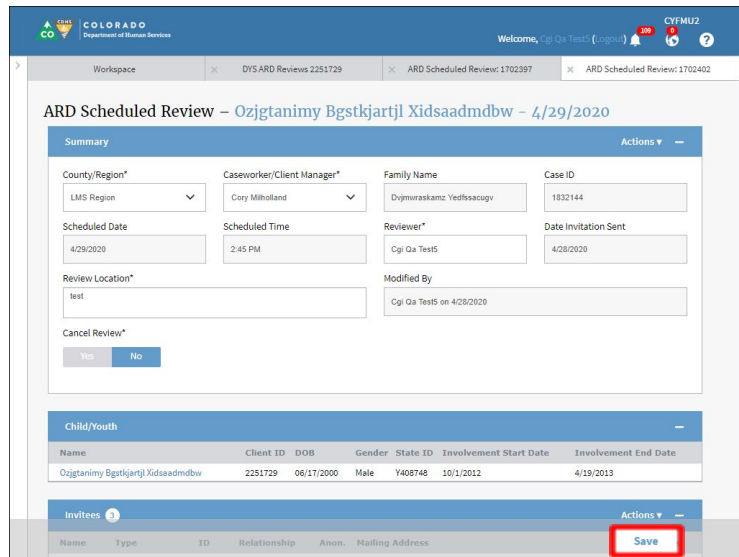
5. Click **Add** to confirm adding the ARD Scheduled Review or **Cancel** to return to the *Copy ARD Scheduled Review* modal.



The new *ARD Scheduled Review* opens in a new Record tab.

6. Make any necessary updates.
7. Click the **Save** button at the bottom of the page to save the new *ARD Scheduled Review* page.

This opens a *Save Successful* pop-up window.





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In the *Save Successful* pop-up window:

8. Click **Ok** to return to the ARD Scheduled Review.

The screenshot shows the 'ARD Scheduled Review Summary' form in a web application. A 'Save Successful' pop-up window is displayed over the form, with the text 'ARD Scheduled Review Details saved successfully.' and an 'Ok' button highlighted with a red box. The form contains the following fields:

Summary				Actions
County/Region*	Caseworker/Client Manager*	Family Name	Case ID	
Western	Cory Miholland	Drymurskama Yedfisaacugv	1832144	
Scheduled Date	Scheduled Time	Reviewer*	Date Invitation Sent	
4/29/2020	2:45 PM	Cgi Oa Test5	4/28/2020	
Review Location*	Modified By			
test	Cgi Oa Test5 on 4/29/2020			
Cancel Review*				
Yes	No			

Child/youth							Actions
Name	Client ID	DOB	Gender	State ID	Involvement Start Date	Involvement End Date	
Ozigtanimy Bgatkjaritj Xidsaadmbdw	2251729	06/17/2000	Male	Y408748	10/1/2012	4/19/2013	


Invitees						Actions
Name	Type	ID	Relationship	Anon.	Mailing Address	
						Save



# DYS\_ARD – Manage DYS ARD Scheduled Review Summary Job Aid

## Delete the ARD Scheduled Review

- The **Delete ARD Scheduled Review** Action is used to remove an ARD Schedule Review from a DYS Case.
- Only a *DYS ARD Reviewer* will be able to delete a DYS ARD Scheduled Review.
- The DYS ARD Scheduled Review cannot be deleted if it is linked to an ARD Review.
- Upon deletion of the ARD Scheduled Review, the ARD Scheduled Review and any associated records, such as the invitee/attendee information, will be deleted from the DYS case.

Steps/Output	Screenshot
<p>In the <i>Summary</i> section:</p> <ol style="list-style-type: none"> <li>1. Click the <b>Actions</b> drop-down arrow in the <i>Summary</i> banner.</li> <li>2. Select <b>Delete ARD Scheduled Review</b>.</li> </ol> <p>A <i>Confirm Delete</i> confirmation pop-up window displays.</p>	

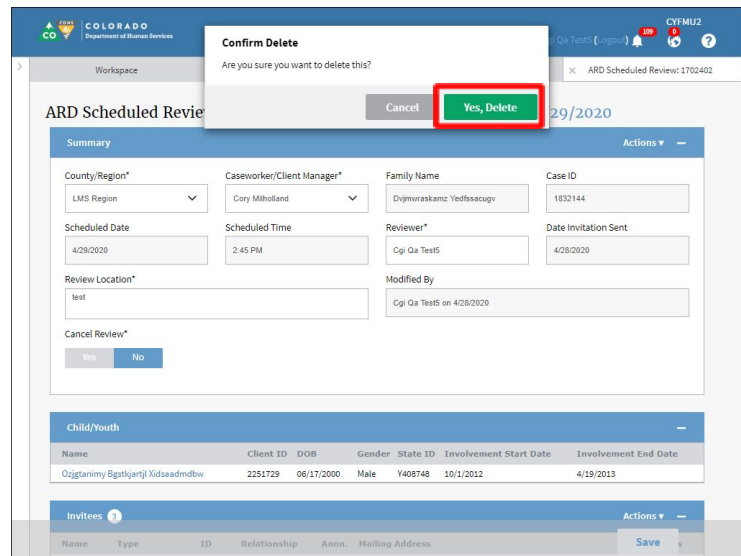


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In the *Confirm Delete* pop-up window:

3. Click **Yes, Delete** to confirm deleting the ARD Scheduled Review and any associated records from the Case or **No** to return to the ARD Scheduled Review.

**Note:** The ARD Scheduled Review cannot be deleted if it is linked to an ARD Review.



Upon deletion, the *ARD Scheduled Review* closes.

The deleted ARD Scheduled Review no longer displays on the *ARD Review* page.

