



DYS – Client Manager Queues

Job Aid

Users

- DYS Client Manager
- DYS Client Manager Supervisor

Process

These Job Aid tables describe the actions needed to access, view and manage the two Client Manager Worker Queues:

- CM Caseload Queue
- Placement Reason Queue

Introduction

- Client Managers can access, view, and manage their own Caseload queue.
- For Client Managers, newly assigned cases will be highlighted to be clearly visible for the Client Manager. Once the DYS Client Manager Detail record is opened, the highlight goes away.
- Client Managers can access, view, and manage Placement Reasons for Youths on their caseload.
- If the DYS case is restricted, the ‘ban’ icon displays beside the Client ID in the Queue. If the Client Manager clicks on the Client ID that is marked with the ‘ban’ icon, the system displays an error message. The Worker will not be able to proceed.
- The exception to this is if the Client Manager has the ARD DYS View Restriction profile. In this case the Client Manager Supervisor will not get the error message and will proceed to the DYS Client Manager Detail page.

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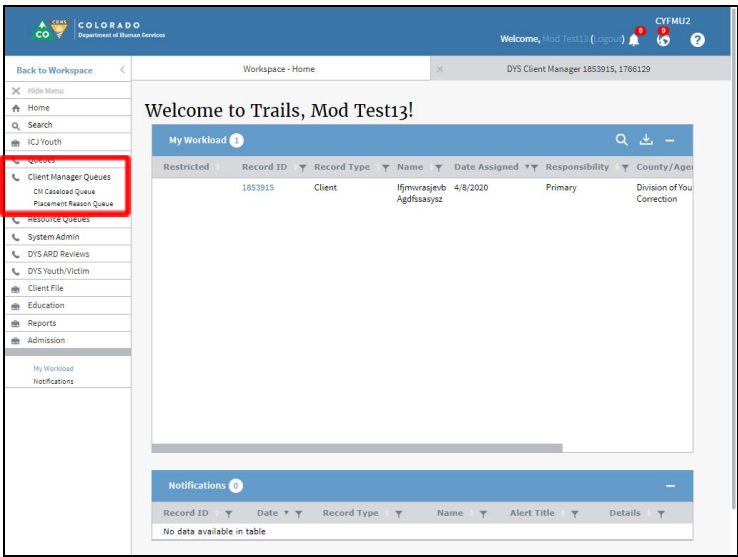
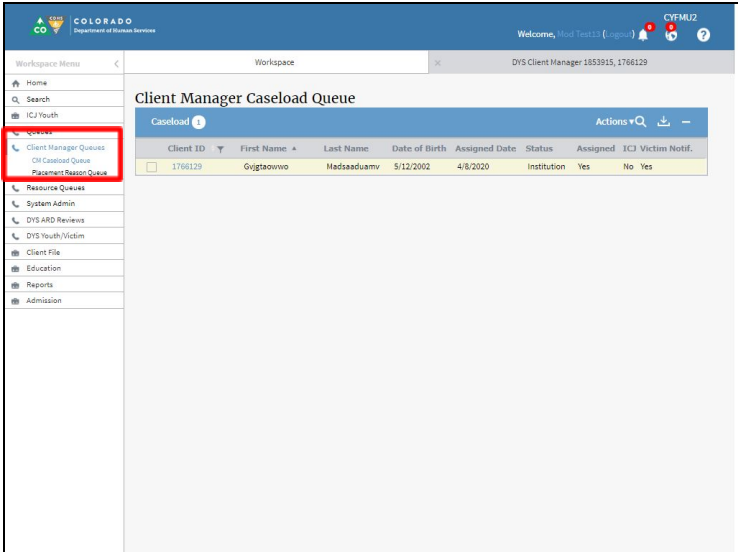


DYS – Client Manager Queues

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Access and View Client Manager Queue

- User must be logged in with a Client Manager profile.
- Client Managers can view their own Caseload queue for their assigned cases for a youth.
- Client Managers can search cases on their workload.
- Client Managers can download their caseload list.
- The default filter is by Last Name in alphabetical order.

Steps/Output	Screenshot																				
<p>In the <i>Left Navigation Panel</i>:</p> <ol style="list-style-type: none"> 1. Click Show Menu. 2. Click Client Manager Queues. <p>This expands the <i>Client Manager Queues</i> to show all queues available to Client Managers that are not Supervisors.</p>	 <p>The screenshot shows the 'Client Manager Queues' menu item highlighted in red in the left navigation panel. The main content area displays a 'My Workload' table with the following data:</p> <table border="1"> <thead> <tr> <th>Record ID</th> <th>Record Type</th> <th>Name</th> <th>Date Assigned</th> <th>Responsibility</th> <th>County/Age</th> </tr> </thead> <tbody> <tr> <td>1853915</td> <td>Client</td> <td>Ijmwrasjev Agdfssasysz</td> <td>4/8/2020</td> <td>Primary</td> <td>Division of You Correction</td> </tr> </tbody> </table>	Record ID	Record Type	Name	Date Assigned	Responsibility	County/Age	1853915	Client	Ijmwrasjev Agdfssasysz	4/8/2020	Primary	Division of You Correction								
Record ID	Record Type	Name	Date Assigned	Responsibility	County/Age																
1853915	Client	Ijmwrasjev Agdfssasysz	4/8/2020	Primary	Division of You Correction																
<ol style="list-style-type: none"> 3. Click CM Caseload Queue. <p>This opens the <i>Client Manager Caseload Queue</i>.</p> <p>Note: The highlight shows a new client case has been assigned to the Client Manager. After first view of the DYS Client Manager Detail page, the highlight will no longer appear.</p>	 <p>The screenshot shows the 'Client Manager Caseload Queue' view. The 'CM Caseload Queue' menu item is highlighted in red in the left navigation panel. The main content area displays a 'Caseload' table with the following data:</p> <table border="1"> <thead> <tr> <th>Client ID</th> <th>First Name</th> <th>Last Name</th> <th>Date of Birth</th> <th>Assigned Date</th> <th>Status</th> <th>Assigned</th> <th>ICI</th> <th>Victim</th> <th>Notif.</th> </tr> </thead> <tbody> <tr> <td>1766129</td> <td>Grigsovrwo</td> <td>Madsdaumv</td> <td>5/12/2002</td> <td>4/8/2020</td> <td>Institution</td> <td>Yes</td> <td>No</td> <td>Yes</td> <td></td> </tr> </tbody> </table>	Client ID	First Name	Last Name	Date of Birth	Assigned Date	Status	Assigned	ICI	Victim	Notif.	1766129	Grigsovrwo	Madsdaumv	5/12/2002	4/8/2020	Institution	Yes	No	Yes	
Client ID	First Name	Last Name	Date of Birth	Assigned Date	Status	Assigned	ICI	Victim	Notif.												
1766129	Grigsovrwo	Madsdaumv	5/12/2002	4/8/2020	Institution	Yes	No	Yes													



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- The **Client ID** and **First Name** columns can be sorted or filtered using the icons to the right of the column headings.

The screenshot shows the 'Client Manager Caseload Queue' interface. The table has the following columns: Client ID, First Name, Last Name, Date of Birth, Assigned Date, Status, Assigned, ICJ, Victim, and Notif. The 'Client ID' and 'First Name' column headers have small downward-pointing arrows next to them, which are highlighted by red boxes. The table contains one row of data for Client ID 1766129, First Name Grigtaouwo, Last Name Madaadumv, Date of Birth 5/12/2002, Assigned Date 4/8/2020, Status Institution, Assigned Yes, ICJ No, and Victim Yes.

4. Click the **Magnifying Glass** to search the queue.

The screenshot shows the same 'Client Manager Caseload Queue' interface. In this view, the search icon (magnifying glass) in the 'Actions' menu is highlighted by a red box. The table data remains the same as in the previous screenshot.



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5. Type the *client id* or *client first name* into the **Search** field to search the queue.
6. Click **X** to exit the **Search**.

The screenshot shows the 'Client Manager Caseload Queue' interface. The search field is highlighted with a red box. The table below shows one client entry:

Client ID	First Name	Last Name	Date of Birth	Assigned Date	Status	Assigned	ICJ	Victim	Notif.
1766129	Grigtaovvo	Madsaadamv	5/12/2002	4/8/2020	Institution	Yes	No	Yes	

- Click **Download Icon** to download the Caseload List.

The downloaded list shows in the bottom left corner of the page.

The screenshot shows the 'Client Manager Caseload Queue' interface. The download icon is highlighted with a red box. The table below shows one client entry:

Client ID	First Name	Last Name	Date of Birth	Assigned Date	Status	Assigned	ICJ	Victim	Notif.
1766129	Grigtaovvo	Madsaadamv	5/12/2002	4/8/2020	Institution	Yes	No	Yes	



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- Click the file downloaded in the bottom of the screen.

The downloaded list displays as an Excel spreadsheet in a separate application. The document can be saved, printed, and edited.

The screenshot shows the 'Client Manager Caseload Queue' page. A table with one row is visible:

Client ID	First Name	Last Name	Date of Birth	Assigned Date	Status	Assigned	ICJ	Victim Notif.
1766129	Grigtaovwo	Madsaadumv	5/12/2002	4/8/2020	Institution	Yes	No	Yes

A red box highlights the download icon in the top right of the table. Below the screenshot, a taskbar shows a file named 'ClientManagerCas...csv' with a red box around it.

To open the *Client Manager* page:

- Click the desired Client ID link in the **Client ID** column.

The screenshot shows the 'Client Manager Caseload Queue' page. The 'Client ID' column in the table is highlighted with a red box:

Client ID	First Name	Last Name	Date of Birth	Assigned Date	Status	Assigned	ICJ	Victim Notif.
1766129	Grigtaovwo	Madsaadumv	5/12/2002	4/8/2020	Institution	Yes	No	Yes

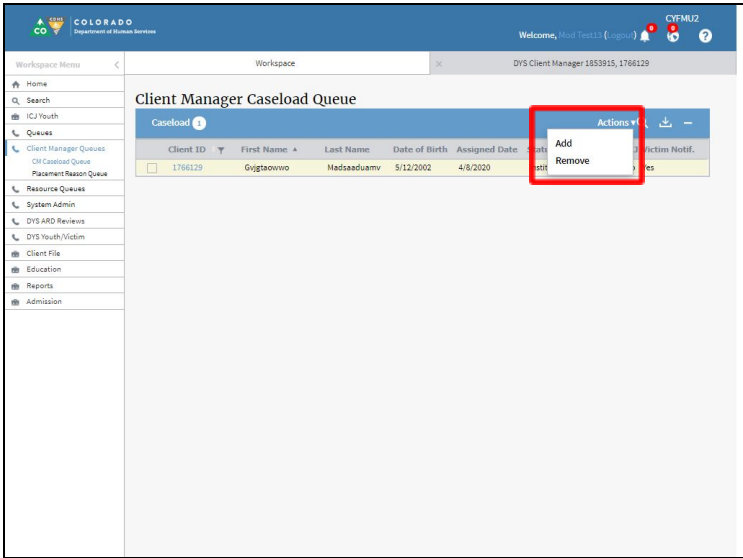
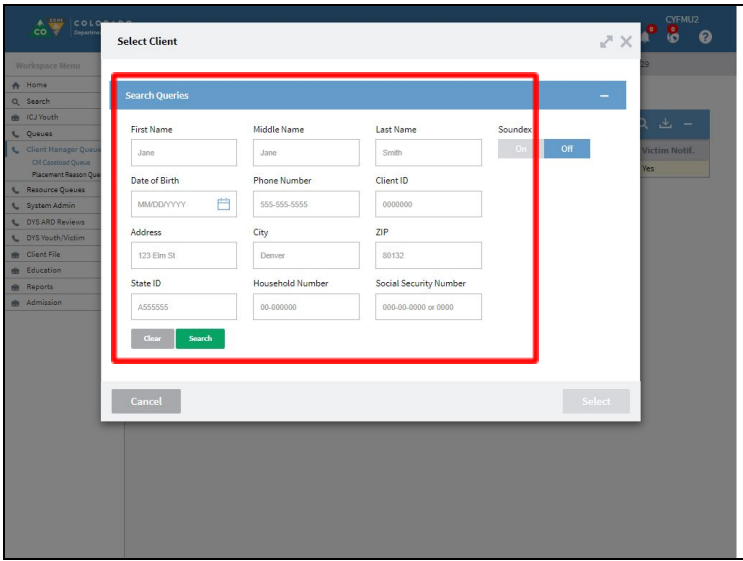


DYS – Client Manager Queues

Job Aid

Add Client Case to Client Manager Queue

- For Client Managers, newly assigned cases are highlighted to be clearly visible for the Client Manager. Once the DYS Client Manager Detail record is opened, the highlight goes away.
- To add a Youth to the worker’s caseload, the Youth must have an open/active DYS Client Manager Detail record.

Steps/Output	Screenshot
<p>In the <i>Client Manager Caseload Queue</i>:</p> <ol style="list-style-type: none"> 1. Click the Actions drop-down. 2. Select Add from the drop down. <p>Select <i>Client</i> search pop-up displays.</p>	
<ol style="list-style-type: none"> 3. Enter the Client ID or other data available to search for the client. 4. Click Search. <p>The <i>DYS Client Manager Detail</i> for that Client ID displays.</p>	



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In the *Select Client Search* pop-up:

5. Click **Full Name** link to choose the client on the list.

Full Name	Client ID	Gender	DOB	Age	State ID	SSN	County	DYS
Hjgjtalmh Qhstkjамxv Qjdsaaodobq	3249494	Male	5/7/2001	18	P019872	758-00-6906	Weld	Yes

6. Click **Select**.

This selects the Client to be added and the *Client Manager Caseload Queue* displays.

Full Name	Client ID	Gender	DOB	Age	State ID	SSN	County	DYS
Hjgjtalmh Qhstkjамxv Qjdsaaodobq	3249494	Male	5/7/2001	18	P019872	758-00-6906	Weld	Yes



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In the *Client Manager Caseload Queue* page:

7. View the newly added Youth Case to the Caseload Queue.

Client ID	First Name	Last Name	Date of Birth	Assigned Date	Status	Assigned	ICJ	Victim	Notif.
1768129	Ongtaoewno	Madsaduum	5/12/2002	4/20/2020	Institution	Yes	No	Yes	
3372793	Wijgaaahu	Vydaadimhp	2/12/2000	4/20/2020	Institution	No	Yes	No	



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Remove Client Case from Client Manager Queue

- The worker can remove one or more cases from their workload by clicking the check box(es) next to the Client ID Case(es) to remove.

Steps/Output	Screenshot
<p>In the <i>Client Manager Caseload Queue</i>:</p> <ol style="list-style-type: none"> Click the check box next to the Client ID of the Youth to remove from the Caseload. Click the Actions drop-down. Select Remove from the drop-down. <p>This displays the confirmation message for the removal.</p>	<p>The screenshot shows the 'Client Manager Caseload Queue' interface. A table with columns: Client ID, First Name, Last Name, Date of Birth, Assigned Date, Status, Assigned, ICS, and Victim Notif. The first row is selected with a checkmark. The 'Actions' dropdown menu is open, showing 'Remove' as the selected option.</p>
<p>In the <i>Transfer Case</i> pop-up page:</p> <ol style="list-style-type: none"> Click Yes to remove the youth from the caseload or Cancel to cancel the removal. <p>The <i>Client Manager Caseload Queue</i> displays without the removed Youth Case.</p>	<p>The screenshot shows a 'Transfer Case' confirmation dialog box. The text inside the dialog asks: 'Are you sure you want to remove the selected record(s) from your caseload queue?'. There are 'Cancel' and 'Yes' buttons at the bottom of the dialog.</p>



DYS – Client Manager Queues Job Aid

Access and View Placement Reason Queue

- A DYS Client Manager can manage all the Placement Reasons for any Youths on their caseload.
- An alert is sent to the assigned Client Manager when the Admission is added to the **Reason Not Updated** list due to **Admission** to a facility.
- An alert is sent to the assigned Client Manager when the Admission is added to the Reason Not Updated list due to **Release** from a facility.
- There will be a list of Admissions (of an open case) associated to all Youth found on the worker's caseload (includes the Youths that were manually added).
- When the Youth is admitted to a facility (no release), the Admission is found on the **Reason Not Updated** filter results.
- Once the required information is entered, the Admission is found on the **Reason Updated** filter results.
- The default sort is by Client Name in alphabetical order and then Admin Date with most recent on top.

Steps/Output	Screenshot														
<p>From the <i>Welcome Screen</i>:</p> <ol style="list-style-type: none"> 1. Click the Client Manager Queues drop-down. 2. Click the Placement Reason Queue. <p>This displays the <i>Placement Reason Queue</i> for those youth assigned to the Client Manager.</p>	<table border="1"> <thead> <tr> <th>Restricted</th> <th>Record ID</th> <th>Record Type</th> <th>Name</th> <th>Date Assigned</th> <th>Responsibility</th> <th>County/Age</th> </tr> </thead> <tbody> <tr> <td></td> <td>1853915</td> <td>Client</td> <td>Ifmivrasjev6 Agdfssasysz</td> <td>4/8/2020</td> <td>Primary</td> <td>Division of You Correction</td> </tr> </tbody> </table>	Restricted	Record ID	Record Type	Name	Date Assigned	Responsibility	County/Age		1853915	Client	Ifmivrasjev6 Agdfssasysz	4/8/2020	Primary	Division of You Correction
Restricted	Record ID	Record Type	Name	Date Assigned	Responsibility	County/Age									
	1853915	Client	Ifmivrasjev6 Agdfssasysz	4/8/2020	Primary	Division of You Correction									



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From the *Placement Reason Queue*:

3. Click the drop-down arrow for the Placement Reason Queue.
4. Select **Reason Updated**.

Note: Default display is **Reason Not Updated**.

The *Placement Reason Queue* displays those Admissions with Reason Updated.

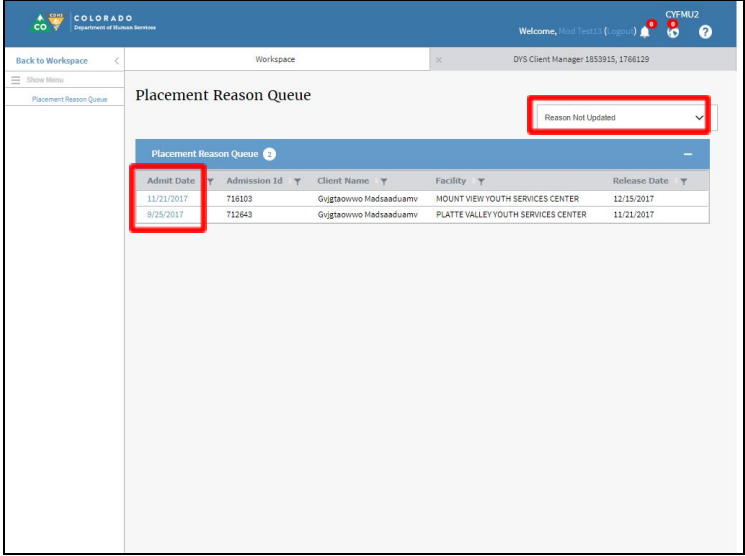
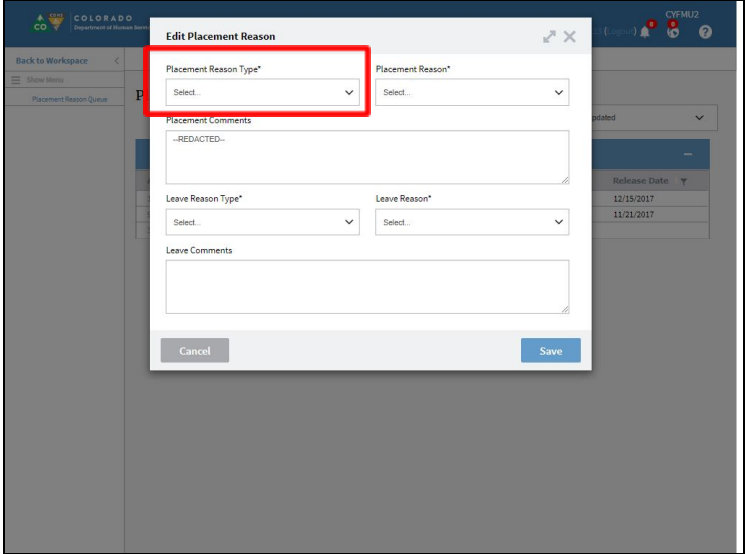
The screenshot shows the 'Placement Reason Queue' interface. At the top, there is a navigation bar with 'Back to Workspace' and 'Workspace'. Below this, there is a 'Placement Reason Queue' section with a dropdown menu currently set to 'Reason Not Updated'. The table below displays the following data:

Admit Date	Admission Id	Client Name	Facility	Release Date
11/21/2017	716103	Gygtawwwo Hadsaaduamy	MOUNT VIEW YOUTH SERVICES CENTER	12/15/2017
9/25/2017	712643	Gygtawwwo Hadsaaduamy	PLATTE VALLEY YOUTH SERVICES CENTER	11/21/2017



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Edit Placement Reason- Reason Not Updated

Steps/Output	Screenshot
<p>From the <i>Placement Reason Queue</i>:</p> <ol style="list-style-type: none"> 1. Click the date from the Admit Date column. <p>This displays the <i>Edit Placement Reason</i> pop-up window.</p>	
<p>In the <i>Edit Placement Reason</i> pop-up window:</p> <ol style="list-style-type: none"> 2. Click Placement Reason Type* drop-down arrow. 3. Select the appropriate option. 	



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4. Click **Placement Reason*** drop-down arrow.
5. Select the appropriate option.

Note: Placement Reason options are dependent on the Placement Reason Type selected.

6. Click in the **Placement Comments** text field.
7. Enter Comments as necessary.



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Continue in the *Edit Placement Reason* pop-up:

8. Click **Leave Reason Type*** drop-down arrow.
9. Select the appropriate option.

The screenshot shows the 'Edit Placement Reason' pop-up form. The form contains several fields: 'Placement Reason Type*' (dropdown), 'Placement Reason*' (dropdown), 'Placement Comments' (text area with '-REDACTED-' placeholder), 'Leave Reason Type*' (dropdown, highlighted with a red box), 'Leave Reason*' (dropdown), and 'Leave Comments' (text area). At the bottom are 'Cancel' and 'Save' buttons.

10. Click **Leave Reason*** drop-down arrow.
11. Select the appropriate option.

Note: Leave Reason options are dependent on the Leave Reason Type selected.

The screenshot shows the 'Edit Placement Reason' pop-up form. The 'Leave Reason*' dropdown menu is highlighted with a red box. The form contains the same fields as the previous screenshot, but the 'Leave Reason Type*' dropdown is not highlighted.



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12. Click in the **Leave Comments** text field.
13. Enter Comments as necessary.

The screenshot shows the 'Edit Placement Reason' dialog box in the Colorado Department of Human Services (CDHS) system. The dialog box contains several fields: 'Placement Reason Type*' (dropdown), 'Placement Reason*' (dropdown), 'Placement Comments' (text area with '-REDACTED-' placeholder), 'Leave Reason Type*' (dropdown), 'Leave Reason*' (dropdown), and 'Leave Comments' (text area). The 'Leave Comments' field is highlighted with a red border. At the bottom of the dialog box are 'Cancel' and 'Save' buttons.

14. Click **Save** to save the Edit Placement Reason page or **Cancel** to cancel and return to the *Placement Reason Queue*.

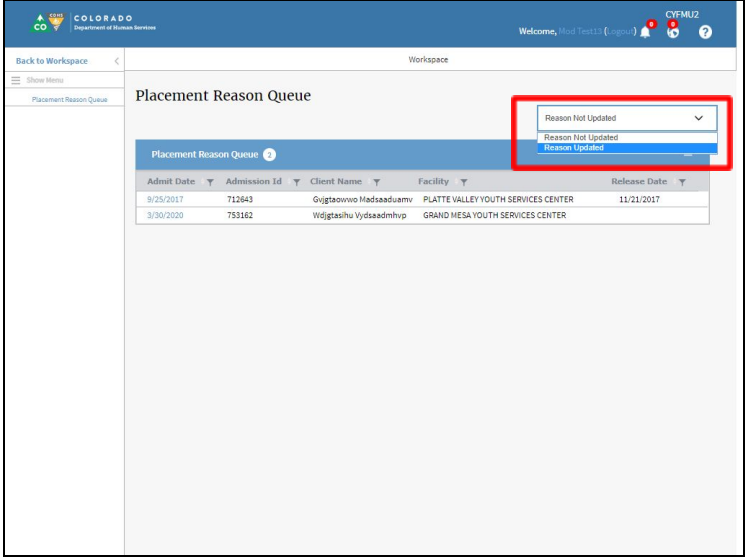
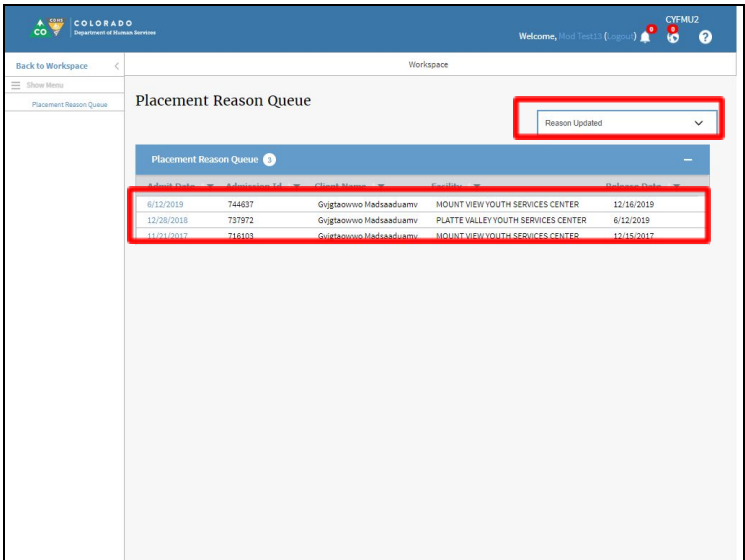
The message “Placement Reason has been successfully updated” displays and then *Placement Reason Queue* displays.

The screenshot shows the 'Edit Placement Reason' dialog box in the Colorado Department of Human Services (CDHS) system. The dialog box contains several fields: 'Placement Reason Type*' (dropdown), 'Placement Reason*' (dropdown), 'Placement Comments' (text area with '-REDACTED-' placeholder), 'Leave Reason Type*' (dropdown), 'Leave Reason*' (dropdown), and 'Leave Comments' (text area). The 'Save' button at the bottom right of the dialog box is highlighted with a red border.



DYS – Client Manager Queues Job Aid

Edit Placement Reason – Reason Updated

Steps/Output	Screenshot																				
<p>In the <i>Placement Reason Queue</i>:</p> <ol style="list-style-type: none"> Click the drop-down arrow for the Placement Reason Queue. Select Reason Updated. <p>In the Reason Updated list – the updated line displays.</p>	 <p>The screenshot shows the 'Placement Reason Queue' interface. A dropdown menu is open, showing three options: 'Reason Not Updated', 'Reason Not Updated', and 'Reason Updated'. The 'Reason Updated' option is highlighted in blue. Below the dropdown is a table with columns: Admit Date, Admission Id, Client Name, Facility, and Release Date. The table contains two rows of data.</p> <table border="1"> <thead> <tr> <th>Admit Date</th> <th>Admission Id</th> <th>Client Name</th> <th>Facility</th> <th>Release Date</th> </tr> </thead> <tbody> <tr> <td>9/25/2017</td> <td>712643</td> <td>Gujgaovvvo Madsaaduamv</td> <td>PLATTE VALLEY YOUTH SERVICES CENTER</td> <td>11/21/2017</td> </tr> <tr> <td>3/30/2020</td> <td>753162</td> <td>Wijgashu Vydsaxdmhpy</td> <td>GRAND MESA YOUTH SERVICES CENTER</td> <td></td> </tr> </tbody> </table>	Admit Date	Admission Id	Client Name	Facility	Release Date	9/25/2017	712643	Gujgaovvvo Madsaaduamv	PLATTE VALLEY YOUTH SERVICES CENTER	11/21/2017	3/30/2020	753162	Wijgashu Vydsaxdmhpy	GRAND MESA YOUTH SERVICES CENTER						
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<p>In the <i>Placement Reason Queue</i>:</p> <ol style="list-style-type: none"> Click the date from the Admit Date column. <p>This displays the <i>Edit Placement Reason</i> pop-up window.</p> <p>Note: In the <i>Edit Placement Reason</i> pop-up window, the Placement Reason Type, Placement Reason and Placement Comments are read-only and cannot be edited.</p>	 <p>The screenshot shows the 'Placement Reason Queue' interface. The dropdown menu is now set to 'Reason Updated'. Below the dropdown is a table with columns: Admit Date, Admission Id, Client Name, Facility, and Release Date. The table contains three rows of data. The first two rows are highlighted with a red box.</p> <table border="1"> <thead> <tr> <th>Admit Date</th> <th>Admission Id</th> <th>Client Name</th> <th>Facility</th> <th>Release Date</th> </tr> </thead> <tbody> <tr> <td>6/12/2019</td> <td>744637</td> <td>Gujgaovvvo Madsaaduamv</td> <td>MOUNT VIEW YOUTH SERVICES CENTER</td> <td>12/16/2019</td> </tr> <tr> <td>12/28/2018</td> <td>737972</td> <td>Gujgaovvvo Madsaaduamv</td> <td>PLATTE VALLEY YOUTH SERVICES CENTER</td> <td>6/12/2019</td> </tr> <tr> <td>11/21/2017</td> <td>716103</td> <td>Gujgaovvvo Madsaaduamv</td> <td>MOUNT VIEW YOUTH SERVICES CENTER</td> <td>12/15/2017</td> </tr> </tbody> </table>	Admit Date	Admission Id	Client Name	Facility	Release Date	6/12/2019	744637	Gujgaovvvo Madsaaduamv	MOUNT VIEW YOUTH SERVICES CENTER	12/16/2019	12/28/2018	737972	Gujgaovvvo Madsaaduamv	PLATTE VALLEY YOUTH SERVICES CENTER	6/12/2019	11/21/2017	716103	Gujgaovvvo Madsaaduamv	MOUNT VIEW YOUTH SERVICES CENTER	12/15/2017
Admit Date	Admission Id	Client Name	Facility	Release Date																	
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12/28/2018	737972	Gujgaovvvo Madsaaduamv	PLATTE VALLEY YOUTH SERVICES CENTER	6/12/2019																	
11/21/2017	716103	Gujgaovvvo Madsaaduamv	MOUNT VIEW YOUTH SERVICES CENTER	12/15/2017																	



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In the *Edit Placement Reason* pop-up:

4. Click the **Leave Reason Type*** drop-down arrow.
5. Select the appropriate option.

The screenshot shows the 'Edit Placement Reason' pop-up form. The 'Leave Reason Type*' dropdown menu is highlighted with a red box, showing 'Administrative' as the selected option. The form includes fields for 'Placement Reason Type' (Administrative), 'Placement Reason' (Entering Assessment), 'Placement Comments' (-REDACTED- Test), 'Leave Reason*' (Transfer to Alternative Placement), and 'Leave Comments' (Leave comments are not necessary). Buttons for 'Cancel' and 'Save' are at the bottom.

6. Click the **Leave Reason*** drop-down arrow.
7. Select the appropriate option.

The screenshot shows the 'Edit Placement Reason' pop-up form. The 'Leave Reason*' dropdown menu is highlighted with a red box, showing 'Transfer to Alternative Placement' as the selected option. The form includes fields for 'Placement Reason Type' (Administrative), 'Placement Reason' (Entering Assessment), 'Placement Comments' (-REDACTED- Test), 'Leave Reason Type*' (Administrative), 'Leave Reason*' (Transfer to Alternative Placement), and 'Leave Comments' (Leave comments are not necessary). Buttons for 'Cancel' and 'Save' are at the bottom.



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8. Click in the **Leave Comments** text field.
9. Enter Comments as necessary.

The screenshot shows the 'Edit Placement Reason' dialog box. The 'Leave Comments' field is highlighted with a red border and contains the text 'Leave comments are not necessary'. The 'Placement Reason Type' is 'Administrative' and the 'Placement Reason' is 'Entering Assessment'. The 'Leave Reason Type*' is 'Administrative' and the 'Leave Reason*' is 'Transfer to Alternative Placement'. The 'Placement Comments' field contains '-REDACTED- Test'. The 'Cancel' and 'Save' buttons are visible at the bottom.

10. Click **Save** to save the Edit Placement Reason page or **Cancel** to cancel and return to the *Placement Reason Queue*.

The message “Placement Reason has been successfully updated” displays and then *Placement Reason Queue* displays.

The screenshot shows the 'Edit Placement Reason' dialog box. The 'Save' button is highlighted with a red border. The 'Leave Comments' field contains the text 'Leave comments can be changed here as well as Leave Reason Type and Leave Reason'. The 'Placement Reason Type' is 'Administrative' and the 'Placement Reason' is 'Entering Assessment'. The 'Leave Reason Type*' is 'Administrative' and the 'Leave Reason*' is 'Transfer to Alternative Placement'. The 'Placement Comments' field contains '-REDACTED- Test'. The 'Cancel' and 'Save' buttons are visible at the bottom.