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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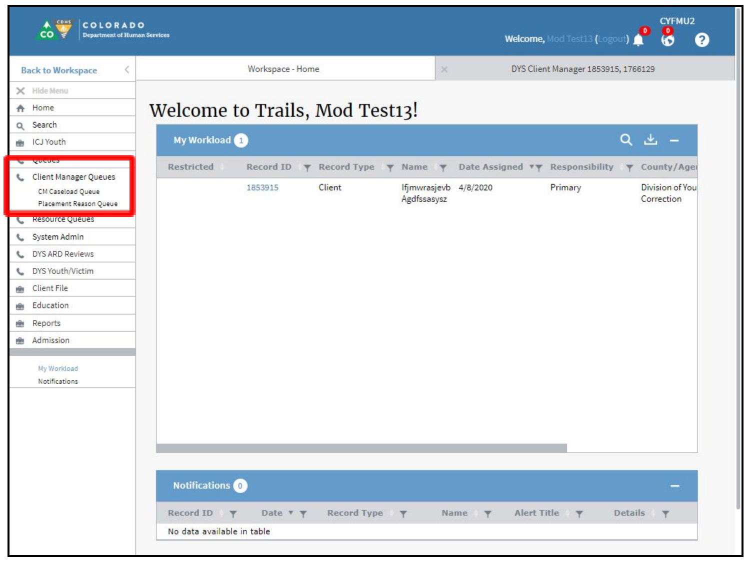
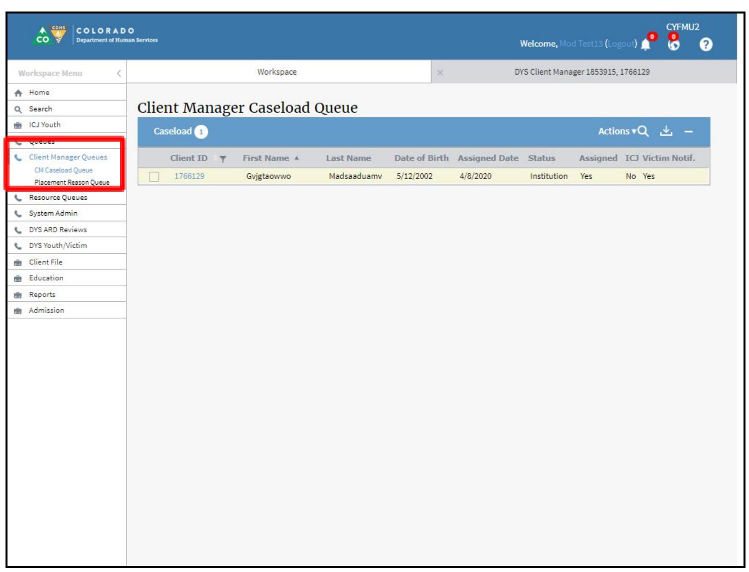
Access and View Client Manager Queue

- 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
In the *Left Navigation Panel:* 1. Click **Show Menu**. 2. Click **Client Manager Queues**. This expands the *Client Manager Queues* to show all queues available to Client Managers that are not Supervisors.	
3. Click **CM Caseload Queue**. This opens the *Client Manager Caseload Queue.* **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.	

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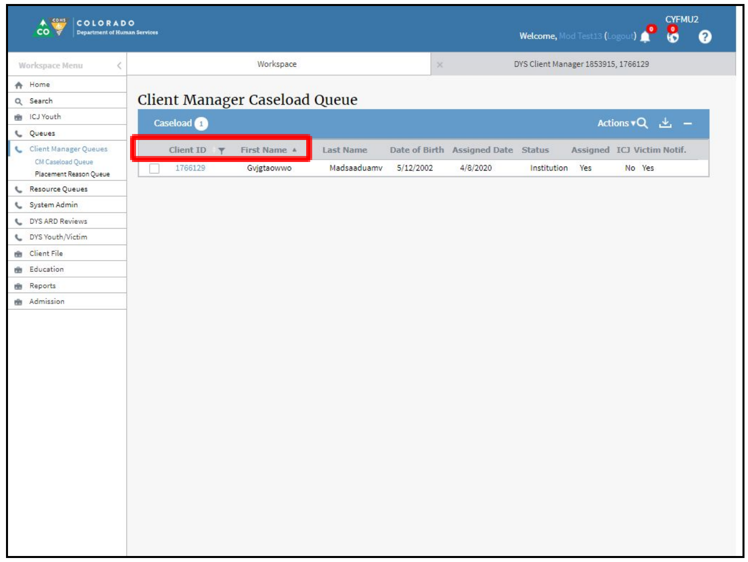
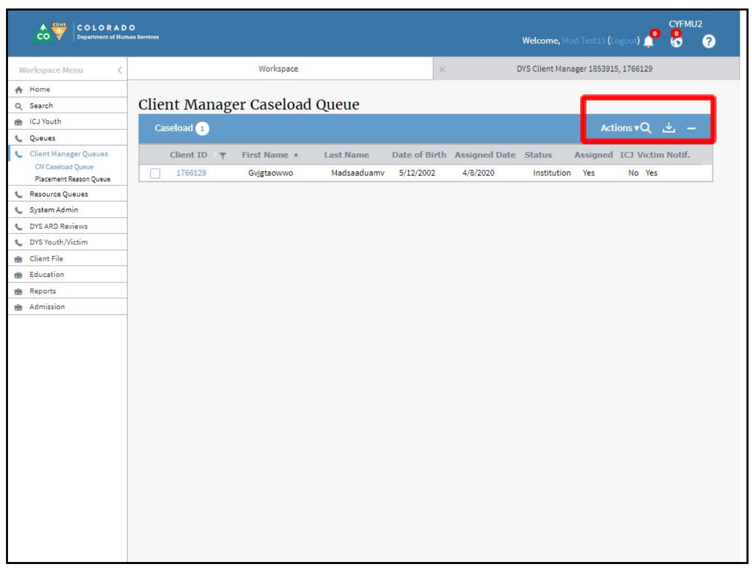
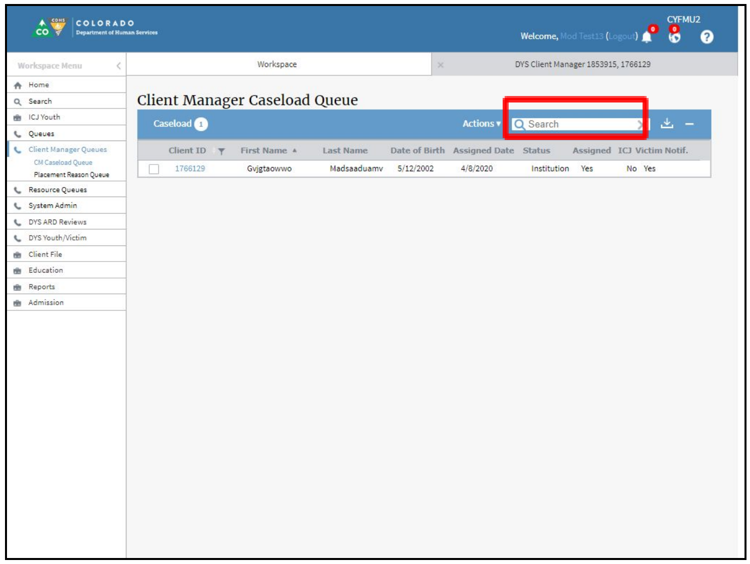
- The **Client ID** and **First Name** columns can be sorted or filtered using the icons to the right of the column headings.



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

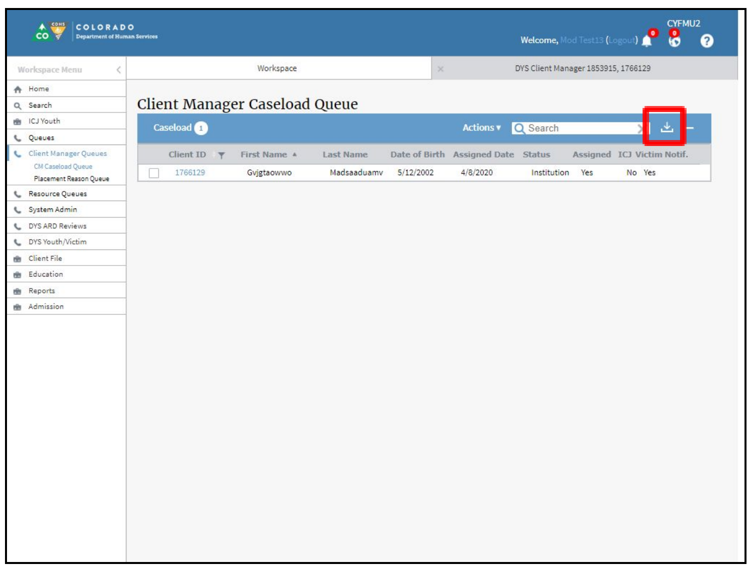


5. Type the *client id* or *client first name* into the **Search** field to search the queue.
6. Click **X** to exit the **Search**.



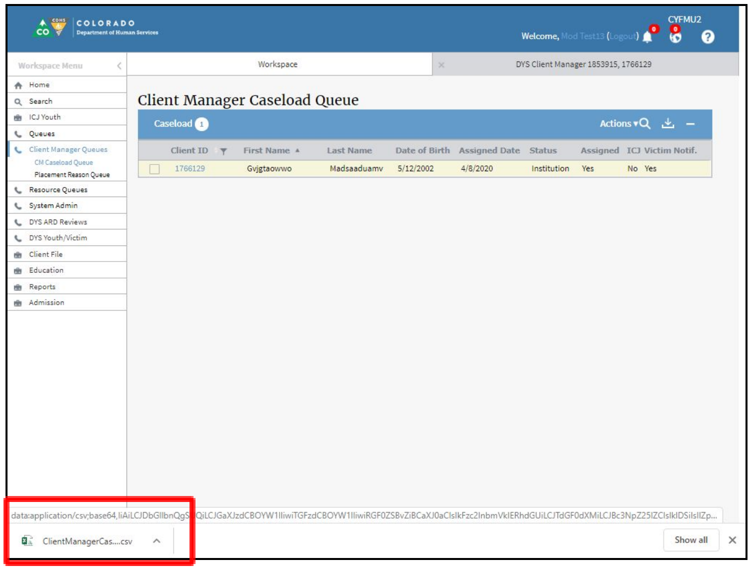
- Click **Download Icon** to download the Caseload List.

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



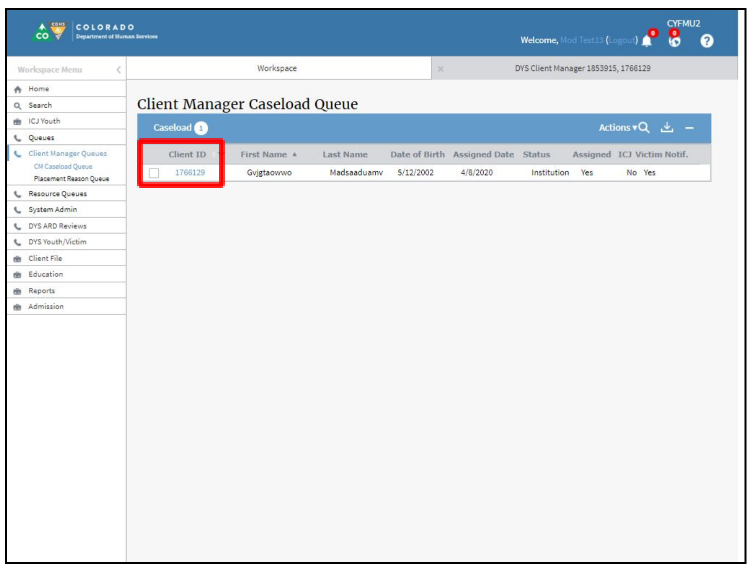
- Click the file downloaded in the bottom of the screen.

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



To open the *Client Manager* page:

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



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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.

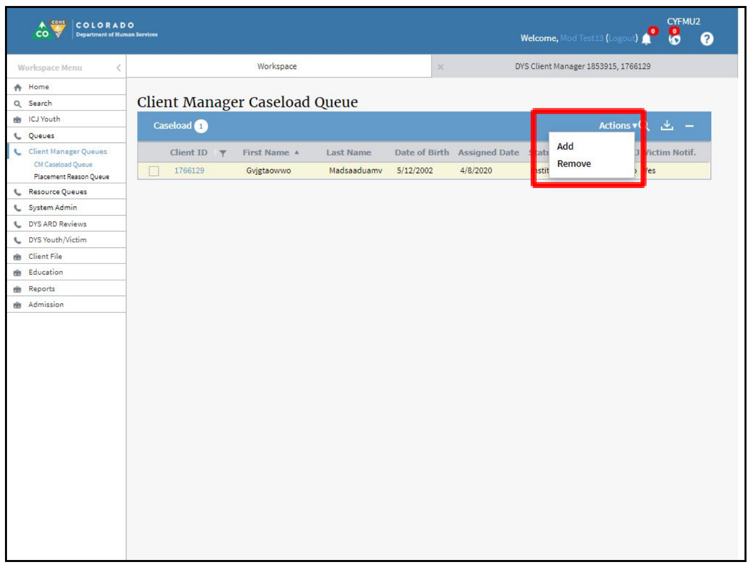
<table>
<tr><th>Steps/Output</th><th>Screenshot</th></tr>
<tr><td>

In the *Client Manager Caseload Queue*:

1. Click the **Actions** drop-down.
2. Select **Add** from the drop down.

Select Client search pop-up displays.

</td><td>

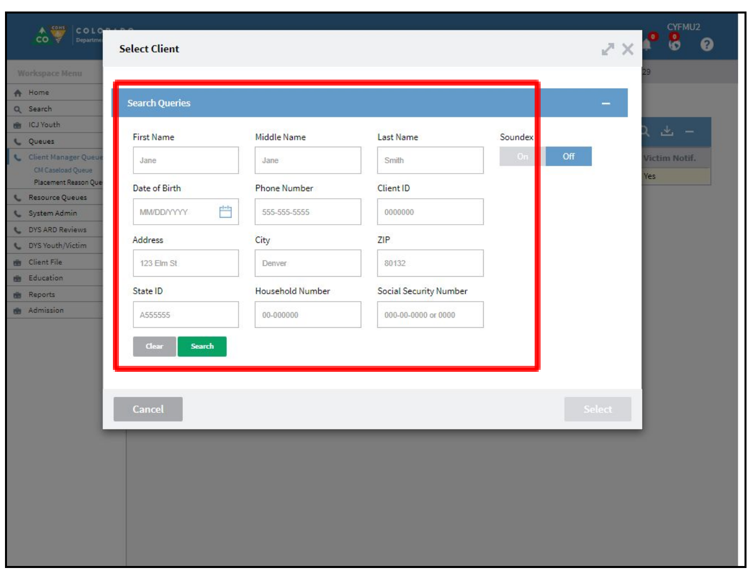


</td></tr>
<tr><td>

3. Enter the **Client ID** or other data available to search for the client.
4. Click **Search**.

The *DYS Client Manager Detail* for that Client ID displays.

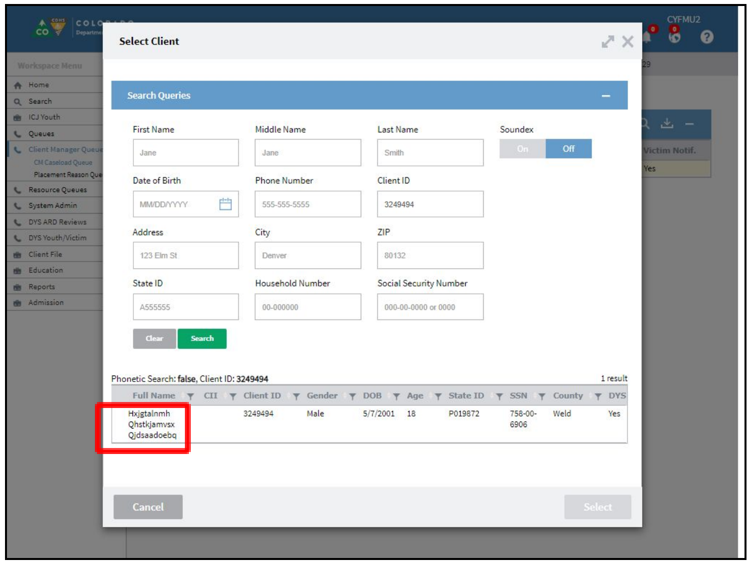
</td><td>



</td></tr>
</table>

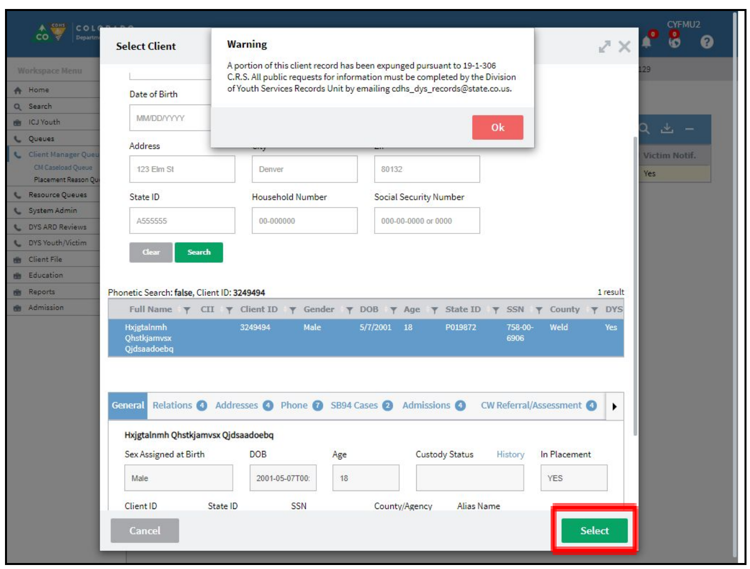
In the *Select Client* Search pop-up*:*

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



6. Click **Select**.

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



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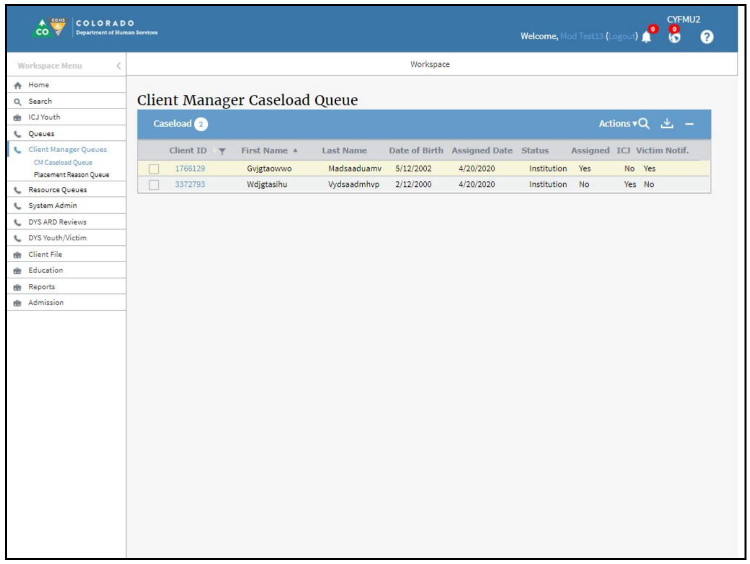
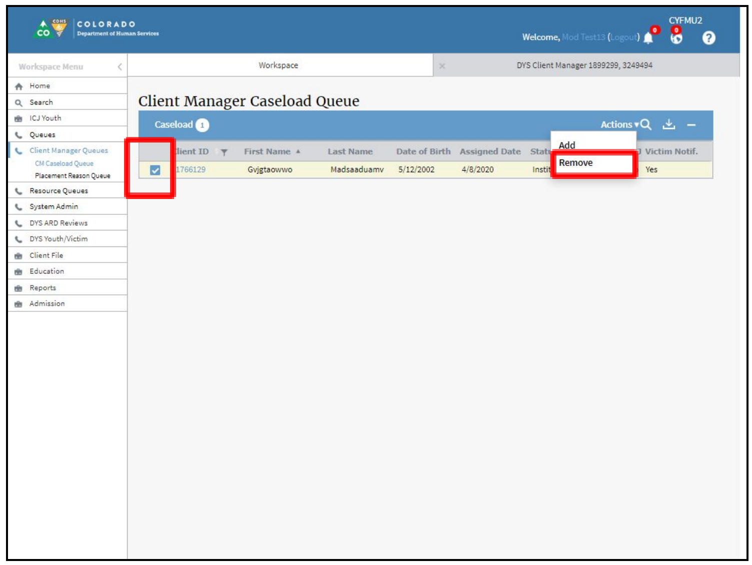
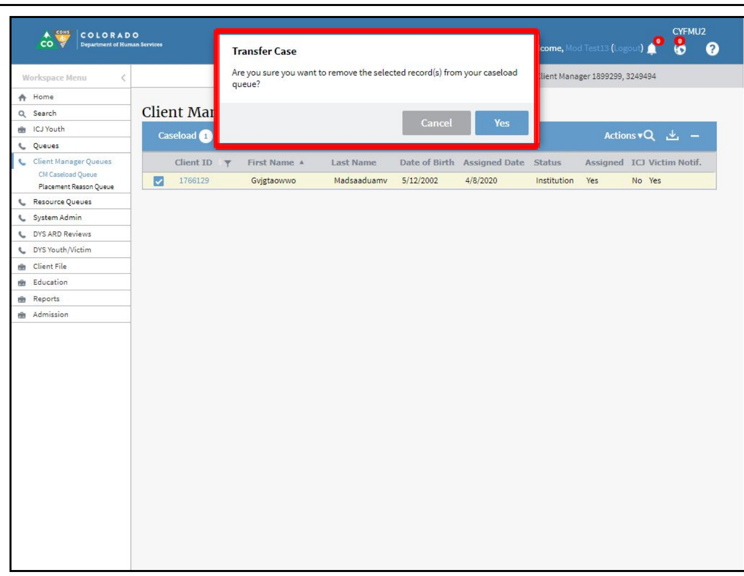
In the *Client Manager Caseload Queue* page:

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



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
In the *Client Manager Caseload Queue*: 1. Click the **check box** next to the **Client ID** of the Youth to remove from the Caseload. 2. Click the **Actions** drop-down. 3. Select **Remove** from the drop-down. This displays the confirmation message for the removal.	
In the *Transfer Case* pop-up page: 4. Click **Yes** to remove the youth from the caseload or **Cancel** to cancel the removal. The *Client Manager Caseload Queue* displays without the removed Youth Case.	

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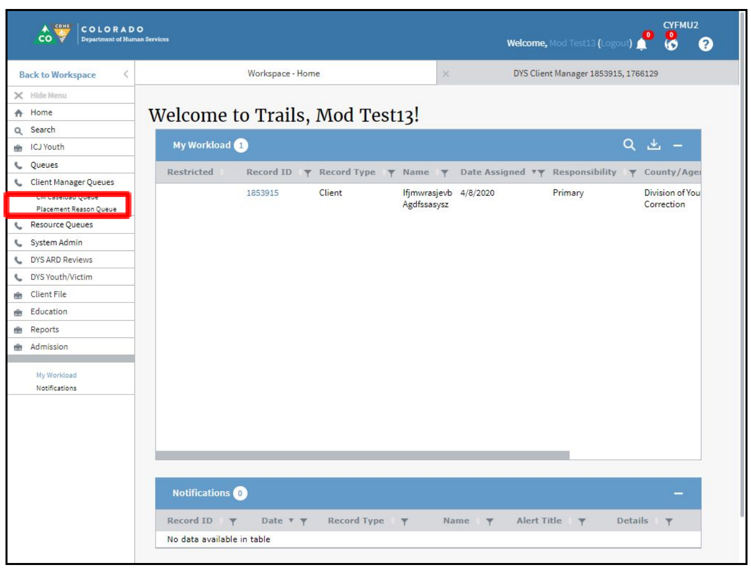
Access and View Placement Reason Queue

- 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.

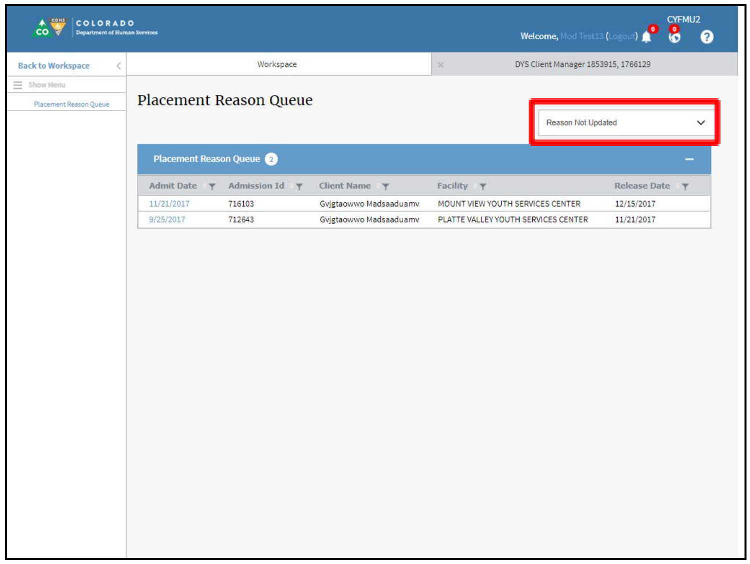
Steps/Output	Screenshot
From the *Welcome Screen*: 1. Click the **Client Manager Queues** drop-down. 2. Click the **Placement Reason Queue**. This displays the *Placement Reason Queue* for those youth assigned to the Client Manager.	

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.



Edit Placement Reason- Reason Not Updated

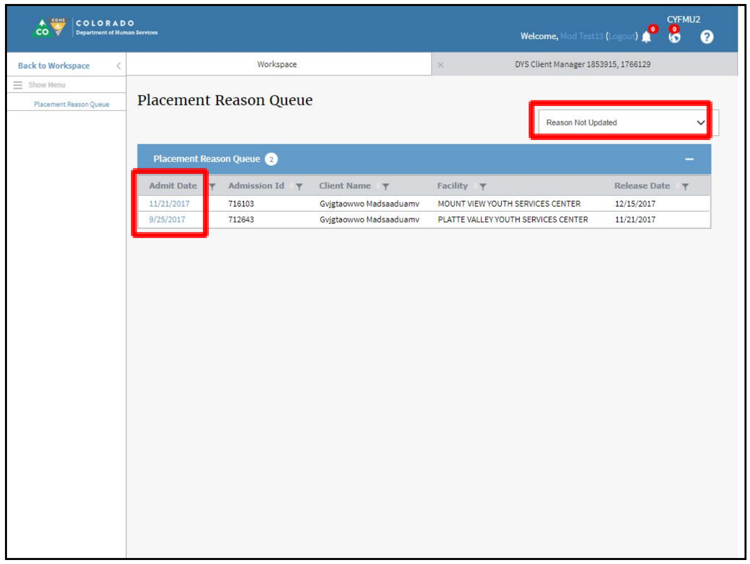
<table>
<tr><th>Steps/Output</th><th>Screenshot</th></tr>
<tr><td>

From the *Placement Reason Queue*:

1. Click the date from the **Admit Date** column.

This displays the *Edit Placement Reason* pop-up window.

</td><td>

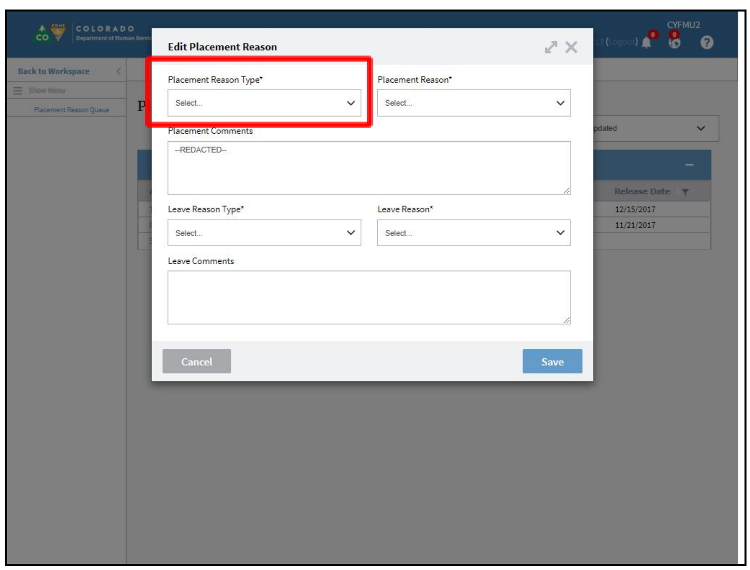


</td></tr>
<tr><td>

In the *Edit Placement Reason* pop-up window:

2. Click **Placement Reason Type*** drop-down arrow**.**
3. Select the appropriate option.

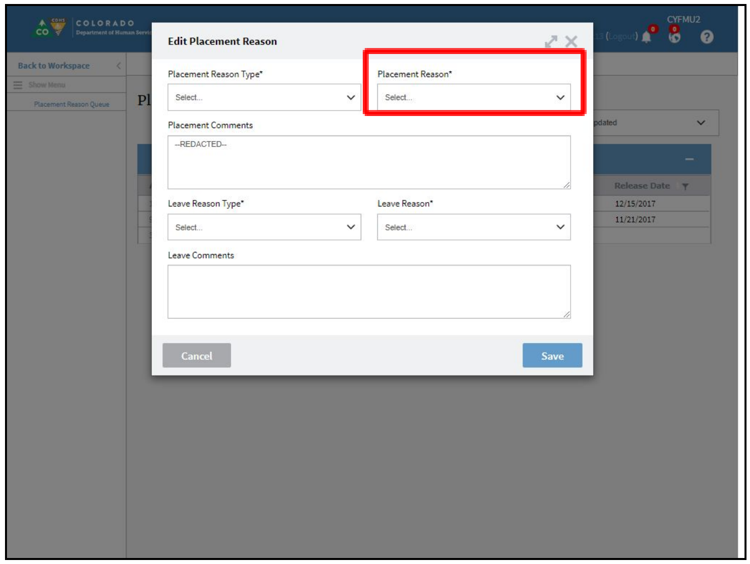
</td><td>



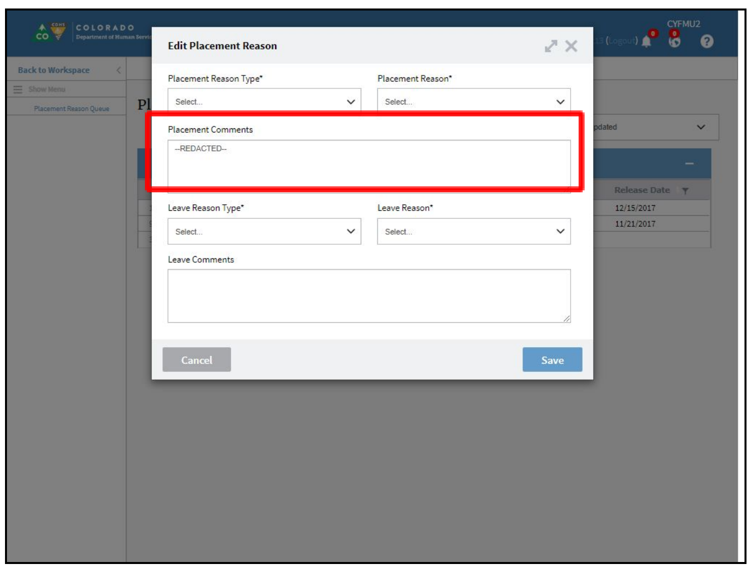
</td></tr>
</table>

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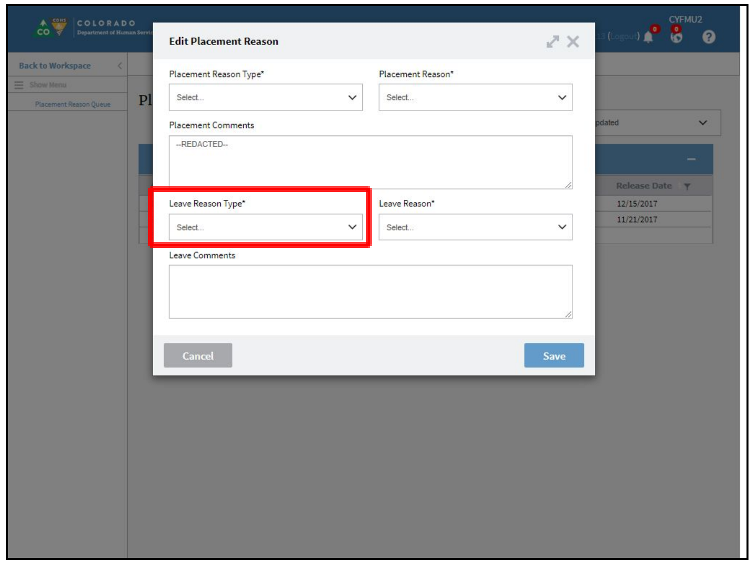
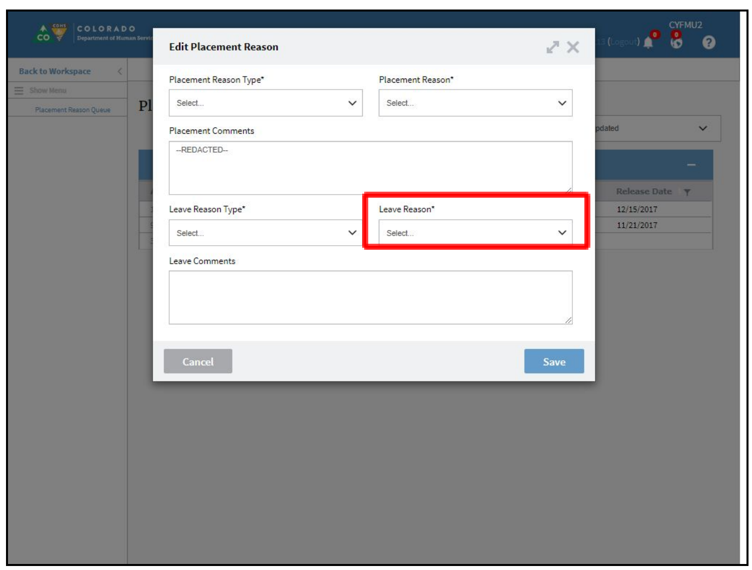
Continue in the *Edit Placement Reason* pop-up:

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

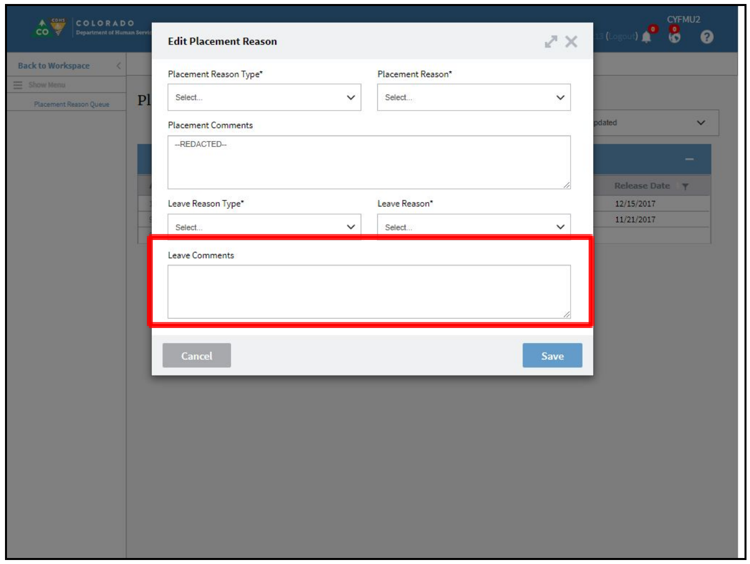


10. Click **Leave Reason*** drop-down arrow**.**
11. Select the appropriate option.

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

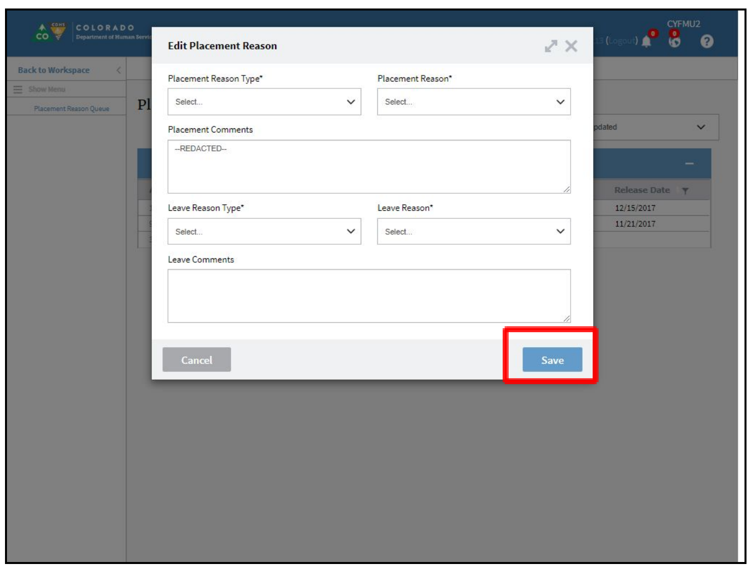


12. Click in the **Leave Comments** text field.
13. Enter Comments as necessary**.**



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.



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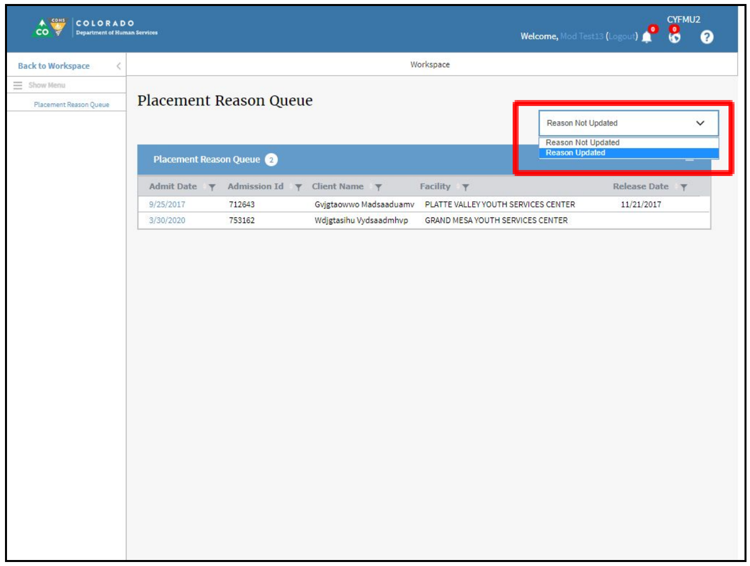
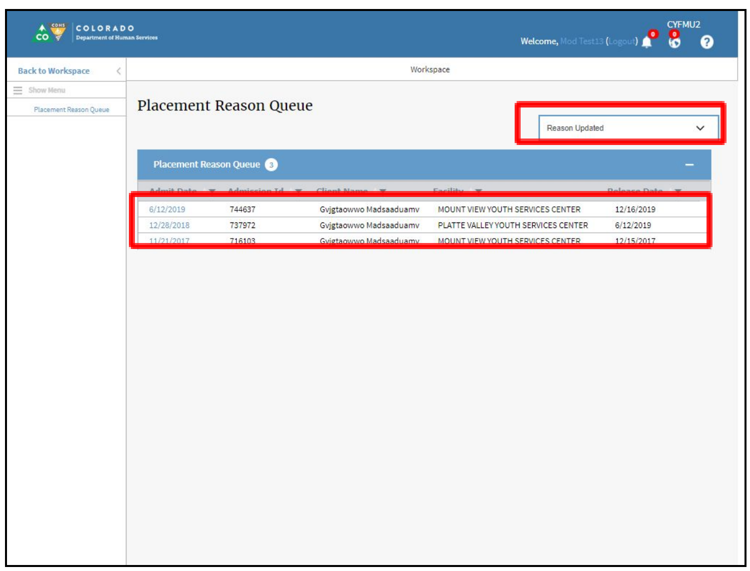
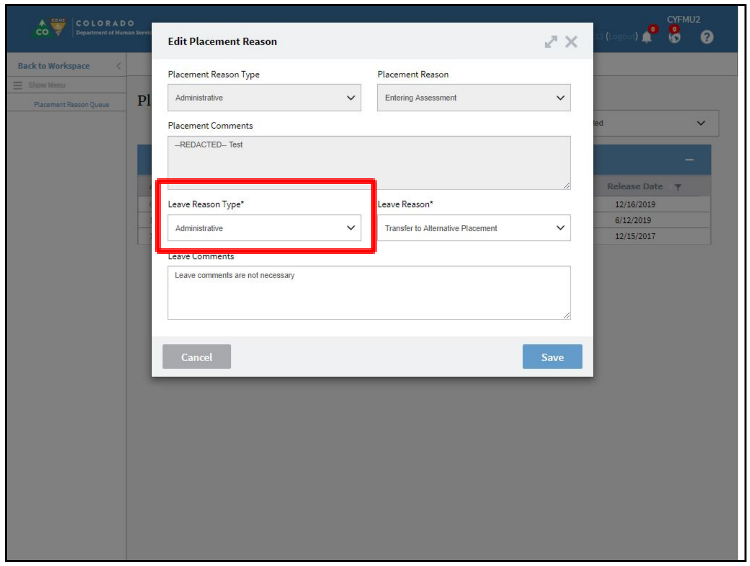
Edit Placement Reason – Reason Updated

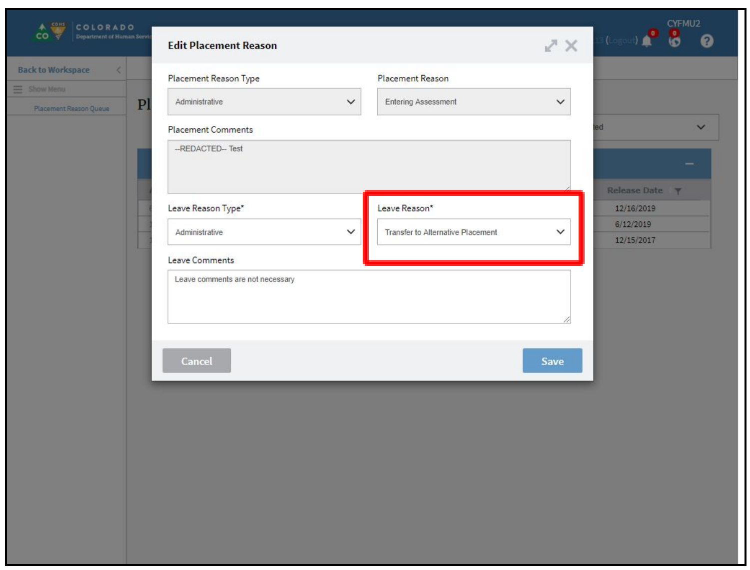
Steps/Output	Screenshot
In the *Placement Reason Queue:* 1. Click the drop-down arrow for the Placement Reason Queue. 2. Select **Reason Updated.** In the Reason Updated list – the updated line displays.	
In the *Placement Reason Queue:* 3. Click the date from the **Admit Date** column. This displays the *Edit Placement Reason* pop-up window. **Note**: In the *Edit Placement Reason* pop-up window, the **Placement Reason Type, Placement Reason** and **Placement Comments** are read-only and cannot be edited.	

In the *Edit Placement Reason* pop-up:

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



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



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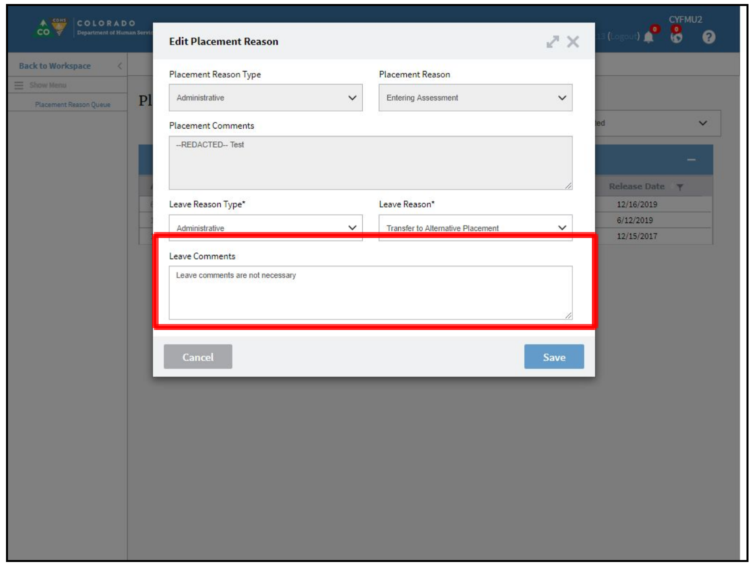
8. Click in the **Leave Comments** text field.
9. Enter Comments as necessary**.**



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.