



DYS Client Manager – Manage Debts/Expense Job Aid

User

- Client Manager Worker
- Client Manager Supervisor

Process

These Job Aid tables describe the actions needed to manage the Debts and Expense for a Youth.

Refer to the *DYS – Access and View Client Manager Job Aid* for details on locating the desired DYS case for a Youth.

Introduction

- The *Debts and Expense* section displays a list of all debts and expenses associated to a DYS case for the Youth.

Table of Contents

Access and View Debts and Expense	2
Add a Debt/Expense	3
Edit a Debt/Expense	7
Add a Payment	9



DYS Client Manager – Manage Debts/Expense Job Aid

Access and View Debts and Expense

Steps/Output	Screenshot
<p>Refer to the <i>DYS Access / View Client Manager Job Aid</i> for details on locating the desired Client and case for a youth.</p> <p>Navigate to the <i>Debts/Expense</i> section by clicking the link in the left navigation panel or using the scroll bar at the right of the page.</p>	
<p>In the <i>Debts/Expense</i> section:</p> <ul style="list-style-type: none"> • A tally (badge count) of the total number of entries is displayed. • The list of Debts/Expense can be sorted or filtered, using the icons to the right of the column headings. 	



DYS Client Manager – Manage Debts/Expense Job Aid

Add a Debt/Expense

- A Debt/Expense can be added if there is an active DYS case for the Youth.
- **Type** field is set to *Restitution* until further notice.

Steps/Output

In the *Debts/Expense* section:

1. Click the **Actions** drop-down arrow.
2. Select **Add Debt/Expense**.

This opens the *Add Debt Expense* workspace.

Screenshot

The screenshot shows the DYS Client Manager interface. The top navigation bar includes the Colorado Department of Human Services logo, a user profile for 'Mod Testa', and a 'CYFMT' indicator. The main content area is titled 'Workspace - Client Search' and displays a table with one row of data under the 'Debts/Expense' section. The table columns are 'Debt Type', 'Date', 'Court Case Number', 'Original Amount', and 'Amount'. The row shows 'Restitution' for the date '03/23/2020', 'Unknown' for the court case number, '\$20.00' for the original amount, and '\$45.00' for the amount. An 'Actions' dropdown menu is open for this row, and 'Add Debt/Expense' is highlighted in a red box. Below the table, there are sections for 'Medical Providers', 'Security Level', 'Length Of Stay', 'CJRA PreScreening', and 'Assessment Instruments', each with its own 'Actions' dropdown menu.



DYS Client Manager – Manage Debts/Expense Job Aid

In the *Add Debt Expense* workspace:

3. Complete the required fields and enter additional information as needed.

The screenshot shows the 'Add Debt Expense' form in the DYS Client Manager workspace. The form is titled 'Add Debt Expense' and contains a 'Debt/Expense List' section. The 'Type' dropdown is set to 'Restitution'. The 'Court Case Number' section has the 'Court Case #' radio button selected, and a dropdown menu is open showing a list of case numbers. The 'Date Incurred' field is empty. The 'Amount' section has 'Original' and 'Currently Owed' fields, both set to '\$ 0.00'. A 'Save' button is at the bottom right.

4. If you know the Court Case #, choose the **Court Case #** radio button and choose from the drop down list.

The screenshot shows the 'Add Debt Expense' form in the DYS Client Manager workspace. The form is titled 'Add Debt Expense' and contains a 'Debt/Expense List' section. The 'Type' dropdown is set to 'Restitution'. The 'Court Case Number' section has the 'Court Case #' radio button selected, and a dropdown menu is open showing a list of case numbers. The 'Date Incurred' field is empty. The 'Amount' section has 'Original' and 'Currently Owed' fields, both set to '\$ 0.00'. A 'Save' button is at the bottom right.



DYS Client Manager – Manage Debts/Expense Job Aid

5. If you know the Court Case #, but it is not shown in the drop down list, choose **Other** radio button and type the *Court Case #* in the text field.

The screenshot shows the 'Add Debt Expense' form. Under the 'Court Case Number' section, the 'Other' radio button is selected and highlighted with a red box. The 'To Whom' dropdown is set to 'Select...', and the 'Date Incurred' field is empty. The 'Amount' section shows 'Original' and 'Currently Owed' both at \$ 0.00.

6. If you do **not** know the Court Case #, then choose the **Unknown** Radio Button.

The screenshot shows the 'Add Debt Expense' form. Under the 'Court Case Number' section, the 'Unknown' radio button is selected and highlighted with a red box. The 'To Whom' dropdown is set to 'Community Collaborat Mgmt Fiscal Ager', and the 'Date Incurred' field is set to 2/24/2020. The 'Amount' section shows 'Original' at \$ 100.00 and 'Currently Owed' at \$ 100.00.



DYS Client Manager – Manage Debts/Expense Job Aid

When all required fields are completed:

- Click **Save** to add the Debt/Expense entry or **< Back to Case Details** at the top of the page to close without saving.

This adds the entry and returns you to the top of the *Client Manager* main page.

- Click **Debts/Expense** section in the left navigation panel to see the *Debts/Expense* saved.

Debt Type	Date	Court Case Number	Original Amount	Currently Owed
Restitution	03/23/2020	Unknown	\$20.00	\$15.00



DYS Client Manager – Manage Debts/Expense Job Aid

Edit a Debt/Expense

- An existing Debts/Expense can be edited if there is an active DYS case for the Youth.
- Only the Client Manager assigned to the youth can enter a payment as part of an edit.
- Delete is not available for this function.

Steps/Output	Screenshot																														
<p>In the <i>Debts/Expense</i> section:</p> <ol style="list-style-type: none"> 1. Click the debt type link in the Debt Type column. <p>This opens the <i>Edit Debt Expense</i> workspace.</p>	<p>The screenshot shows the 'Edit Debt Expense' workspace. The 'Debt Type' column in the table is highlighted with a red box. The workspace includes sections for Medical Providers, Security Level, and Length of Stay.</p> <table border="1"> <thead> <tr> <th>Debt Type</th> <th>Date</th> <th>Court Case Number</th> <th>Original Amount</th> <th>Currently Owed</th> </tr> </thead> <tbody> <tr> <td>Restitution</td> <td>03/16/2020</td> <td>D0032017J0000795</td> <td>\$100.00</td> <td>\$100.00</td> </tr> <tr> <td>Restitution</td> <td>03/22/2016</td> <td>D0032017J0000795</td> <td>\$128.00</td> <td>\$128.00</td> </tr> <tr> <td>Restitution</td> <td>07/19/2016</td> <td>D0492016J0000420</td> <td>\$268.97</td> <td>\$268.97</td> </tr> <tr> <td>Restitution</td> <td>07/19/2016</td> <td>D0492016J0000444</td> <td>\$6,978.00</td> <td>\$6,978.00</td> </tr> <tr> <td>Restitution</td> <td>07/19/2016</td> <td>D0492016J0000395</td> <td>\$63.13</td> <td>\$63.13</td> </tr> </tbody> </table>	Debt Type	Date	Court Case Number	Original Amount	Currently Owed	Restitution	03/16/2020	D0032017J0000795	\$100.00	\$100.00	Restitution	03/22/2016	D0032017J0000795	\$128.00	\$128.00	Restitution	07/19/2016	D0492016J0000420	\$268.97	\$268.97	Restitution	07/19/2016	D0492016J0000444	\$6,978.00	\$6,978.00	Restitution	07/19/2016	D0492016J0000395	\$63.13	\$63.13
Debt Type	Date	Court Case Number	Original Amount	Currently Owed																											
Restitution	03/16/2020	D0032017J0000795	\$100.00	\$100.00																											
Restitution	03/22/2016	D0032017J0000795	\$128.00	\$128.00																											
Restitution	07/19/2016	D0492016J0000420	\$268.97	\$268.97																											
Restitution	07/19/2016	D0492016J0000444	\$6,978.00	\$6,978.00																											
Restitution	07/19/2016	D0492016J0000395	\$63.13	\$63.13																											



DYS Client Manager – Manage Debts/Expense Job Aid

In the *Edit Debt Expense* workspace:

2. Use the drop-down arrows and text fields to update the required fields and add additional information as needed.

The screenshot shows the 'Edit Debt Expense' workspace. The form includes the following fields and options:

- Type:** Restitution (dropdown)
- Court Case Number:** Court Case # (dropdown) with value D002017J000798
- To Whom:** Arapahoe (dropdown)
- Date Incurred:** 03/18/2020 (calendar icon)
- Amount:** Original (\$ 100.00), Currently Owed (\$ 100.00)
- Payment List:** Table with columns: Payment Date, Payment Amount, Payment Comments. Current status: No information available.

A 'Save' button is located at the bottom right of the workspace.

When changes are complete:

3. Click **Save** to save the changes or **< Back to Case Details** to close without saving.

This screenshot is identical to the one above, but the 'Save' button at the bottom right is highlighted with a red rectangular box.



DYS Client Manager – Manage Debts/Expense Job Aid

This saves the changes and returns you to the top of the Client Manager.

4. Click **Debts/Expense** section to return to the section to see the edited debt/expense.

The screenshot shows the DYS Client Manager interface. The left sidebar contains a navigation menu with the following items: Youth Info, Colorado, Case Notes, Permanency Goal, 18 of 22, Document Tracking (highlighted with a red box), Medical Providers, Security Level, Length Of Stay, CJRA PreScreening, Assessment Instruments, Trafficking, Drug and Alcohol Screening, Placement, Service Authorization, Other Placements, Team Members, Reviews/Meetings, Projected Transition, Edu/Notify, Notice of Services Action, Physical Hearings, Parole Dates, Parole Level of Supervision, Commitment Discharge, Assignment and Transfer, History, Non-Resident Youth Information. The main content area displays the 'Debts/Expense' section, which is highlighted with a red box. This section contains a table with the following data:

Debt Type	Date	Court Case Number	Original Amount	Currently Owed
Restitution	03/23/2020	Unknown	520.00	515.00

Below the table, there are sections for 'Medical Providers', 'Security Level', 'Length Of Stay', 'CJRA PreScreening', and 'Assessment Instruments'. The 'Assessment Instruments' section has a 'Save' button.



DYS Client Manager – Manage Debts/Expense Job Aid

Add a Payment

- An existing Debt/Expense can have a payment added to the debt if there is an active DYS case for the Youth.
- Only the Client Manager assigned to the Youth can enter a payment as part of an edit.
- Delete is not available for this function.

Steps/Output	Screenshot																														
<p>In the <i>Debt/Expense</i> section:</p> <ol style="list-style-type: none"> 1. Click the debt type link in the Debt Type column. <p>This opens the <i>Edit Debt Expense</i> workspace.</p>	<p>The screenshot shows the 'Edit Debt Expense' workspace. The 'Debt Type' column is highlighted with a red box, showing a list of debts with columns for Date, Court Case Number, Original Amount, and Currently Owed. Below this are sections for Medical Providers, Security Level, and Length of Stay.</p> <table border="1"> <thead> <tr> <th>Debt Type</th> <th>Date</th> <th>Court Case Number</th> <th>Original Amount</th> <th>Currently Owed</th> </tr> </thead> <tbody> <tr> <td>Restitution</td> <td>03/16/2020</td> <td>D0032017, D000796</td> <td>\$100.00</td> <td>\$100.00</td> </tr> <tr> <td>Restitution</td> <td>03/22/2018</td> <td>D0032017, D000796</td> <td>\$128.00</td> <td>\$128.00</td> </tr> <tr> <td>Restitution</td> <td>07/19/2016</td> <td>D0692016, D000430</td> <td>\$288.87</td> <td>\$288.87</td> </tr> <tr> <td>Restitution</td> <td>07/19/2016</td> <td>D0692016, D000444</td> <td>\$6,578.00</td> <td>\$6,578.00</td> </tr> <tr> <td>Restitution</td> <td>07/19/2016</td> <td>D0692016, D000395</td> <td>\$63.13</td> <td>\$63.13</td> </tr> </tbody> </table>	Debt Type	Date	Court Case Number	Original Amount	Currently Owed	Restitution	03/16/2020	D0032017, D000796	\$100.00	\$100.00	Restitution	03/22/2018	D0032017, D000796	\$128.00	\$128.00	Restitution	07/19/2016	D0692016, D000430	\$288.87	\$288.87	Restitution	07/19/2016	D0692016, D000444	\$6,578.00	\$6,578.00	Restitution	07/19/2016	D0692016, D000395	\$63.13	\$63.13
Debt Type	Date	Court Case Number	Original Amount	Currently Owed																											
Restitution	03/16/2020	D0032017, D000796	\$100.00	\$100.00																											
Restitution	03/22/2018	D0032017, D000796	\$128.00	\$128.00																											
Restitution	07/19/2016	D0692016, D000430	\$288.87	\$288.87																											
Restitution	07/19/2016	D0692016, D000444	\$6,578.00	\$6,578.00																											
Restitution	07/19/2016	D0692016, D000395	\$63.13	\$63.13																											



DYS Client Manager – Manage Debts/Expense Job Aid

If the Youth has made a payment on their debt:

2. Click **Actions**.
3. Select **Add Payment**.

Colorado Department of Human Services
DYS Client Manager 1914426, 3566725

Workspace

Back to Case Details
Edit Debt Expense

Debt/Expense List

Type
Restitution

Court Case Number
 Court Case #
 Other
Unknown

To Whom
Administrative Review Division

Date Incurred
03/23/2020

Amount
Original \$ 20.00
Currently Owed \$ 20.00

Payment List

Payment Date	Payment Amount	Payment Comments
No information available		

Actions
Add Payment

Save

The *Add Payment* pop-up module displays.

4. Enter **Payment Date** and **Payment Amount** on the screen and **Comments** as necessary to add the payment.
5. Click **Add** to add the payment or **Cancel** to close without saving.

Colorado Department of Human Services
DYS Client Manager 1914426, 3566725

Workspace

Back to Case Details
Edit Debt Expense

Debt/Expense List

Type
Restitution

Court Case Number
 Court Case #
 Other
Unknown

To Whom
Administrative Review Division

Date Incurred
03/23/2020

Amount
Original \$ 20.00
Currently Owed \$ 20.00

Payment List

Payment Date	Payment Amount	Payment Comments
No information available		

Actions
Add Payment

Save

Add Payment

Payment Date
3/23/2020

Payment Amount
\$ 10.00

Comments
test documentation

Cancel Add



DYS Client Manager – Manage Debts/Expense Job Aid

Payment displays in the *Payment List*.

6. Click **Save** to save the payment and return to Client Manager.

Note: Once the payment is added and shown on the list, it is saved and cannot be deleted.

The screenshot shows the 'Edit Debt Expense' interface. The form contains the following fields and values:

- Type: Restitution
- Court Case Number: Other
- To Whom: Administrative Review Division
- Date Incurred: 03/23/2020
- Amount Original: \$ 20.00
- Amount Currently Owed: \$ 15.00

The Payment List table is as follows:

Payment Date	Payment Amount	Payment Comments
03/23/2020	\$5.00	testing payment add

A red box highlights the 'Save' button at the bottom right of the form.