



APS-CMS User Manual

Please Note: The contents of this manual reflect the current APS-CMS system and will change to align with the new APS Model.

Contents

Dashboards	4
Creating and Viewing Dashboards	4
Role-based Dashboards	8
Navigation Bar	10
Waffle Menu (App Launcher)	13
Global Search	14
List Views	14
Creating a List View	16
Guidance for Success	19
Creating a Direct Intake Report	19
Viewing or Editing Intake Reports	24
Searching/Creating/Linking Contacts	26
Searching from the Intake	26
Creating/Linking Contacts	28
Edit Existing Contacts	30
Creating/Linking Providers	31
Create New Provider	31
Search/Link Facilities	32
Create New Provider from an Intake Report	33
Linking Physicians	34
Search/Link Physicians	34
APS Notes	37
Allegations	38
Screening Out/Screening In	39
Screened Out	39
Screened In	40
Cases	40
Create and View a Case	40
Updating information for a deceased victim	43

Create/Link Contacts from Case	44
Edit Contacts or Case Associates	45
Link Intakes to Case	46
Print Preliminary Case	47
Field History Tracker.....	48
Activate Security.....	49
Opioid and Covid 19 Suspect.....	52
Service Plans	53
Creating Service Plans	53
Viewing or Editing Service Plans.....	54
Print Service Plan.....	55
Reassigning Cases	57
Referring Cases to an Agency	58
Case Review for Quality Analysis.....	60
Delegating Authority	62
Using Chatter	63
Creating a Post in Chatter	63
Creating Chatter Groups	65
Attaching an Image to a Chatter Post	68
Reports	69
Accessing Reports.....	69
Creating Reports.....	70
NARMS Report	73
Attaching Files	74
Attaching Files to Cases and Intakes	74

Navigating in APSCMS

The APSCMS is most compatible with Google Chrome, Edge, Safari, or FireFox. The APSCMS is **NOT COMPATIBLE** with Internet Explorer!

The details below will give you an idea of what things you will see upon logging into the system. This includes:

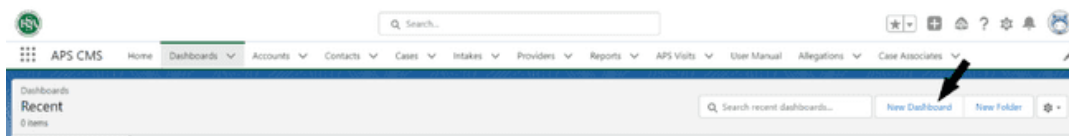
- Dashboards
- Navigation Bar
- Waffle Menu (App Launcher)
- Global Search
- List Views

Dashboards

Users can see key data from one or multiple reports by utilizing Dashboards.

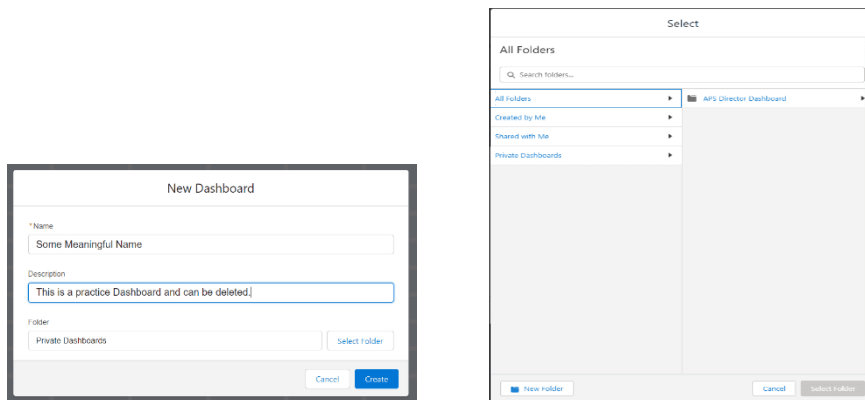
Creating and Viewing Dashboards

1. Click the Dashboards tab on the Navigation Bar (pictured below) to open the Dashboards page.
2. Locate and click the **New Dashboard** button in the upper right corner of the page (below the Navigation Bar).



3. Give your dashboard a name (required), a description (optional), and use the **Select Folder** button to choose where to save your dashboard. You will see the Select page pictured below

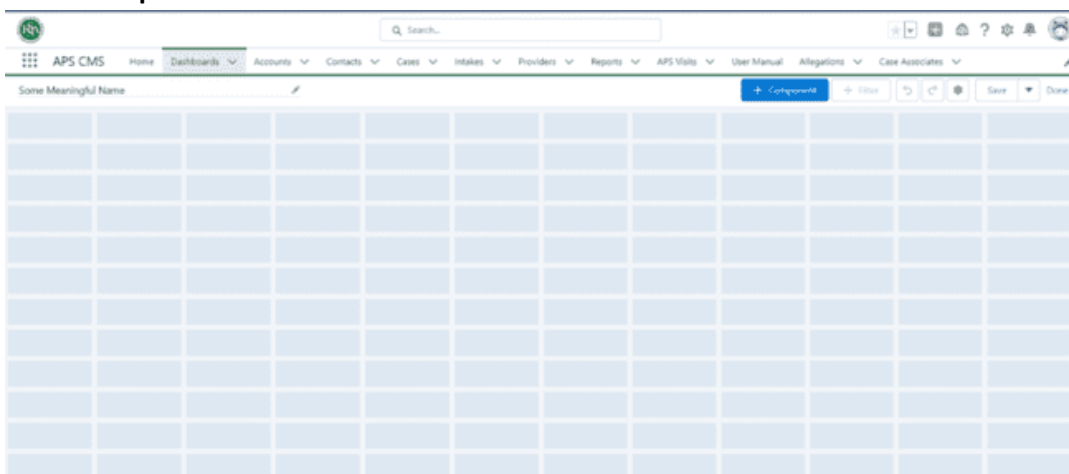
where you will have the option to store the dashboard in an existing folder or create a new folder.



The left screenshot shows a 'New Dashboard' form. It has a 'Name' field with the placeholder 'Some Meaningful Name', a 'Description' field with the placeholder 'This is a practice Dashboard and can be deleted', and a 'Folder' dropdown menu currently set to 'Private Dashboards'. There are 'Cancel' and 'Create' buttons at the bottom right.

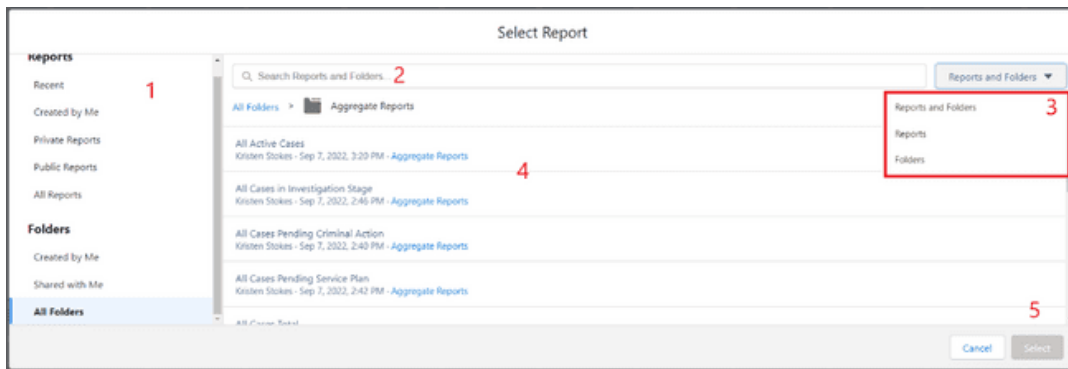
The right screenshot shows a 'Select' dialog box. It has a search bar at the top. Below it is a tree view of folders. The 'All Folders' section is expanded, showing 'All Folders', 'Created by Me', 'Shared with Me', and 'Private Dashboards'. The 'All Folders' section is selected, and it shows a sub-folder 'APS Director Dashboard'. There are 'New folder', 'Cancel', and 'Select folder' buttons at the bottom.

4. Once you have named your dashboard and decided where to store it, click the **Create** button. You will be taken to the page (below) where you can start building your dashboard by clicking the **+ Component** button.

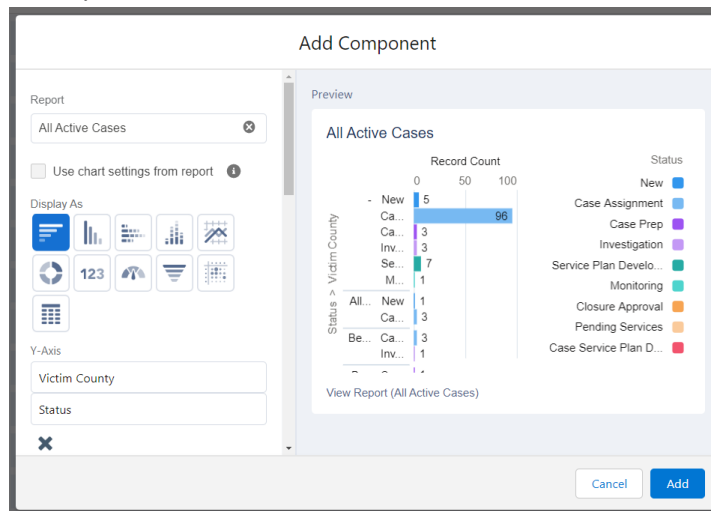


The screenshot shows the APS CMS dashboard editor. The top navigation bar includes 'APS CMS', 'Home', 'Dashboards', 'Accounts', 'Contacts', 'Cases', 'Intakes', 'Providers', 'Reports', 'APS Visits', 'User Manual', 'Allegations', and 'Case Associates'. Below the navigation bar is a search bar and a '+ Component' button. The main area is a large grid of components, with a '+ Component' button in the top right corner.

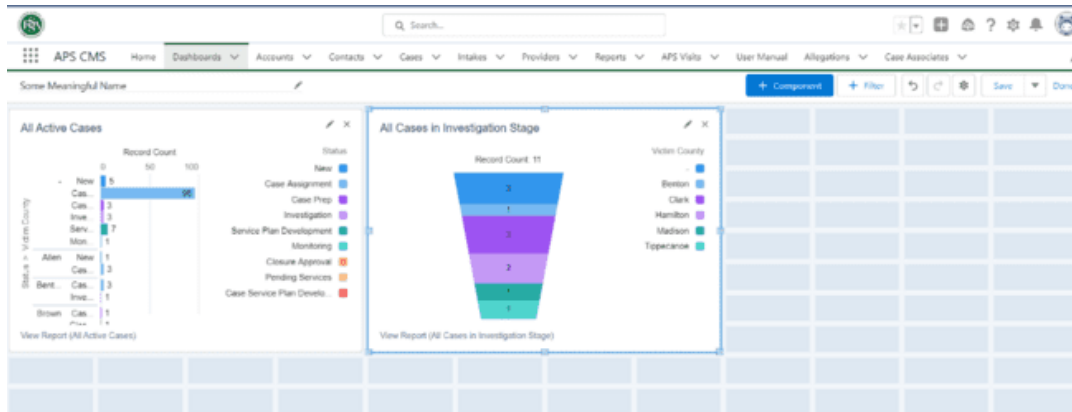
5. Clicking the **+ Component** button will display the following window where you can select the reports to use in your dashboard. There are multiple methods to search for reports to include:
 - a. Use links in the section labeled '1' to search for either reports, or folders containing reports.
 - b. Use the search box labeled '2' to search using keywords.
 - i. Choosing one of the three options from the **Reports and Folders** button labeled '3' will specify where you want to search using the keyword you enter in the search box.
 - c. Results from your search will display in the area labeled '4'. Select the report to include in your dashboard and then click the **Select** button, labeled '5'.



6. The following window displays. Note the report name shows at the top of the left column. The way the report will display in your dashboard is shown in the Preview pane on the right. The user can customize how the report displays by editing the options in the left column. Not all options are shown in this image, use the scroll bar for additional options. Once the Preview shows the report as you want it on your dashboard click the **Add** button.



- Image below is a sample of dashboard showing two reports. A user can rearrange components by clicking on the report and dragging it to another position. Users can resize the report by clicking the report, so it is outlined (see report on right) and then clicking a corner or side and dragging it to the size you want it.

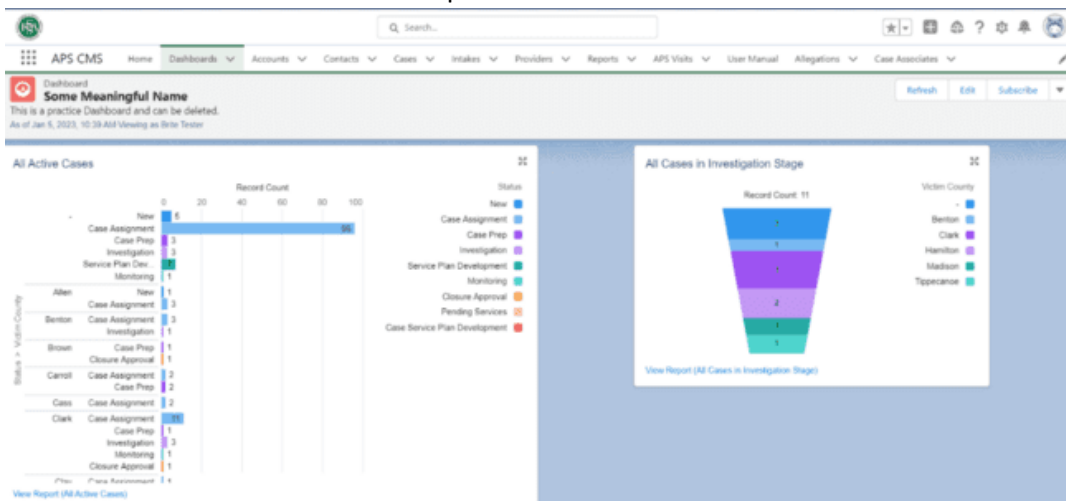


- When you are finished creating your dashboard, click the **Save** button. Your new dashboard now shows on your Dashboards tab.

The screenshot shows the 'Recent' dashboard list in the APS CMS. The table below lists the recent dashboard.

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Some Meaningful Name	This is a practice Dashboard and can be deleted.	Private Dashboards	Brian Tester	1/5/2023, 9:44 AM	

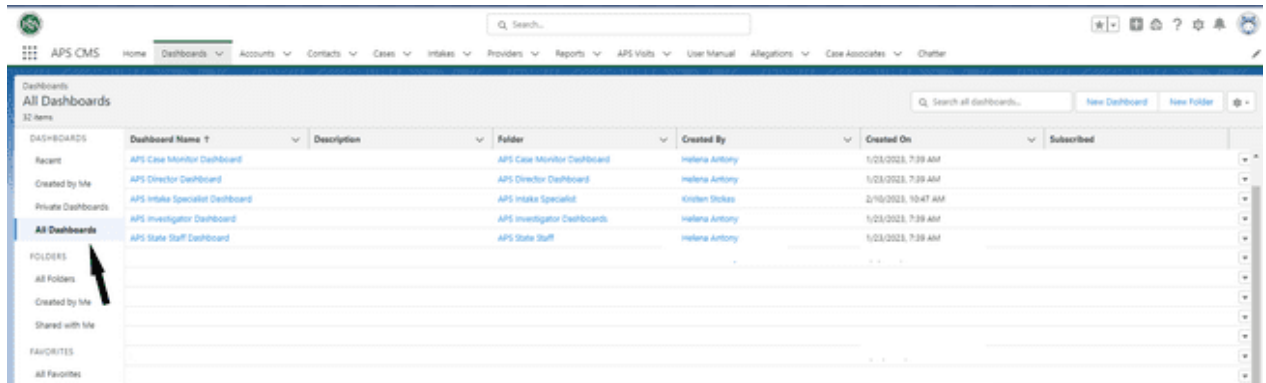
- Click the dashboard's name to open and view it.



Role-based Dashboards

Depending on a user's role, they will be able to view Standard Dashboards.

1. From the Dashboards tab, click on the All Dashboards link in the left-hand column. A list of Dashboards available to you will display. Note: the image below shows a list of all the standard, role-based Dashboards, your list will look different.



2. Click the Dashboard name you wish to view, and it will open.
3. Users may also use any of the links in the left-hand column to search for existing Dashboards. Or, they may type the name of the Dashboard into the Search all dashboards... box in the upper right corner of the page shown in the image above.

Users cannot directly edit a standard Dashboard. If you wish to make changes to a Standard Dashboard:

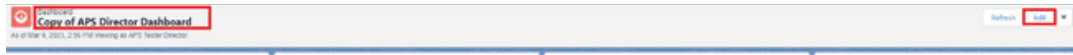
1. Open the Dashboard then select the down-arrow to the right of the **Refresh** button and click Save As.



2. Rename your Dashboard, select the folder in which you want to save it and then click the **Create** button. In this example I chose to keep the default values of Copy of APS Director Dashboard and APS Director Dashboard folder.

A screenshot of a 'Save As' dialog box. It has a title bar that says 'Save As'. Inside, there is a field for '* Name' with the text 'Copy of APS Director Dashboard'. Below that is a 'Folder' section with a text field containing 'APS Director Dashboard' and a 'Select Folder' button. At the bottom right, there are 'Cancel' and 'Create' buttons.

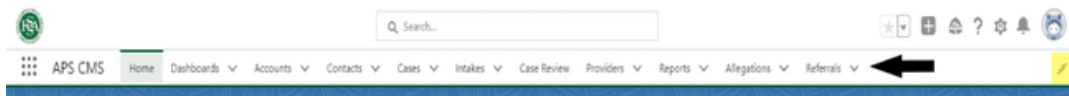
3. Once you save your Dashboard notice the name has changed and you now have access to an **Edit** button.



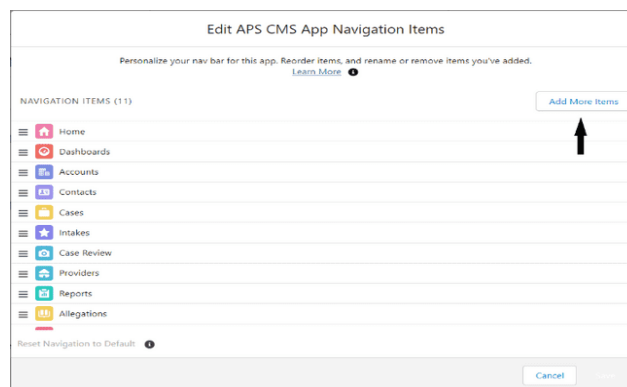
4. Clicking **Edit** will give you options to rearrange the existing components by dragging and dropping where you want them, removing individual components by clicking the 'x' in the upper right corner of the component, and adding new components by clicking the **+Component** button. Don't forget to **Save** when you are finished.

Navigation Bar

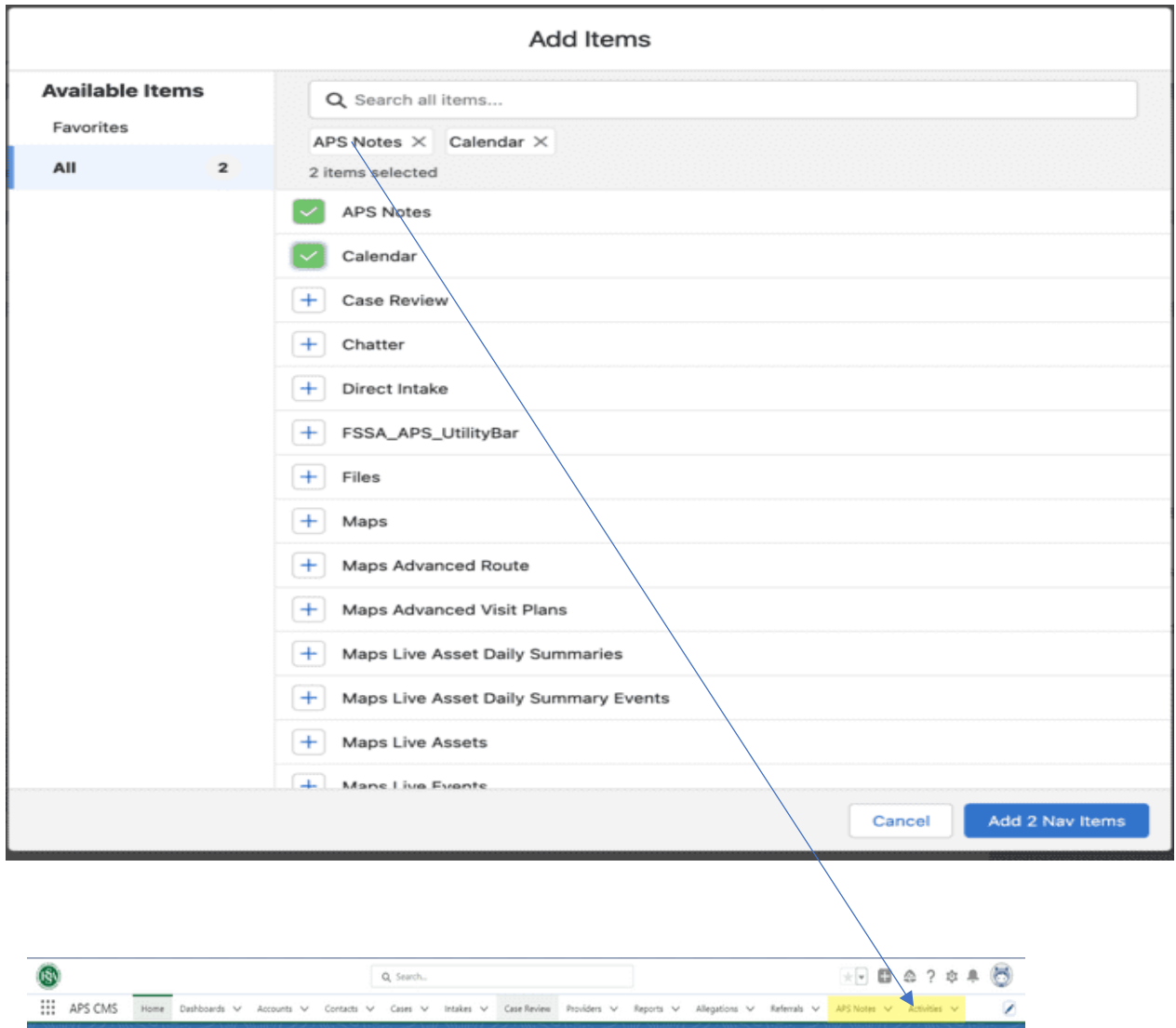
This is the list of tabs (also referred to as Objects) you will see at the top of your screen. Under these tabs are where you will find lists of records such as Intake Reports or Cases. These can be personalized to a certain extent, for example, you can drag and drop them between each other to change the order they are displayed. You can also add tabs to your Navigation Bar:



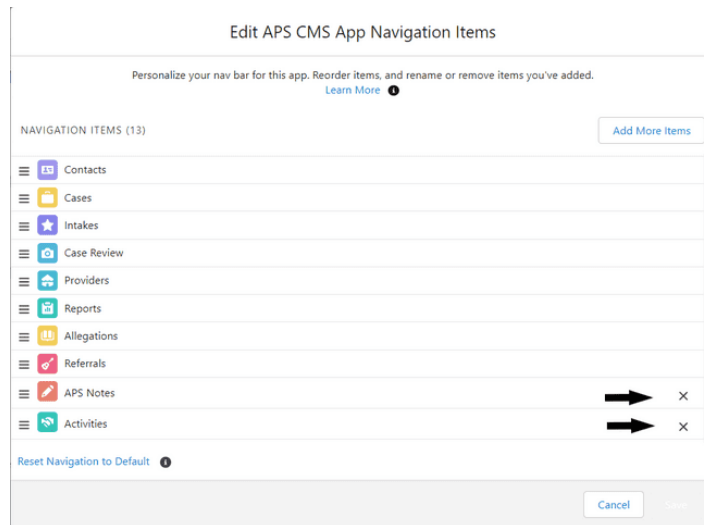
1. To add tabs to the Navigation Bar, click the pencil icon (highlighted in the image above) to the far right of the bar.
2. On the pop-up window, click the Add More Items button (see image below), a new Add Items pop-up window will display.



3. On the Add Items pop-up window, click All on the left-hand side (under Available Items). Tabs you have access to will display. Click the (+) button next to the tab name(s) to add to your list. A green box with a checkmark will appear next to the selected tab(s) and the tab name(s) will appear under the Search box. Once all tabs you want to add to your Navigation Bar have been selected, click the blue Add Nav Items button at the bottom of the page, then click the Save button on the Edit APS CMS App Navigation Items pop-up window. Those tabs now appear on your Navigation Bar.



4. To remove tabs from the Navigation Bar, click the pencil icon at the far right of the Navigation Bar. The Edit APS CMS App Navigation Items window opens, and you will see an 'X' to the right of the tabs you can remove. Click the 'X' next to all tabs you want to remove. After you make your first selection a blue Save button appears in the bottom right corner next to the Cancel button. Click the Save button and the tabs no longer appear on your Navigation Bar.

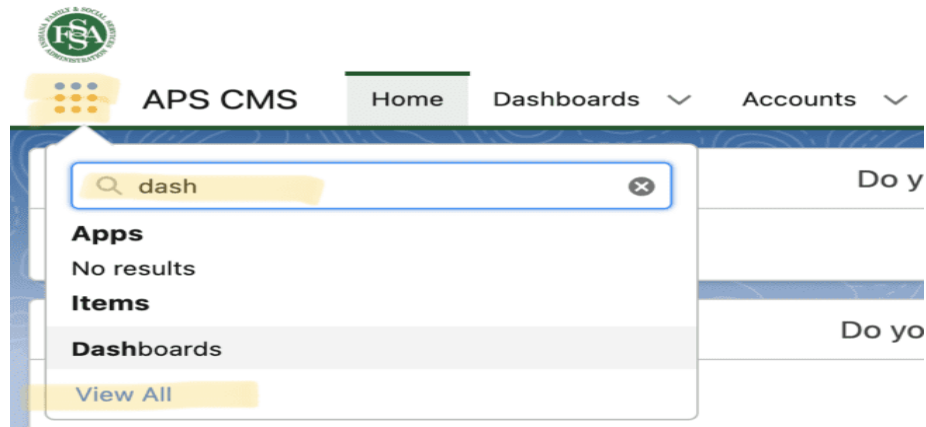


Waffle Menu (App Launcher)

This is the square icon directly to the left of the Navigation Bar. You can click on this icon to search for a specific tab using the search bar directly inside the square, or you can click View All to see an entire list of all the tabs you have access to. ***Note:** Accessing a tab this way will not permanently add it to your Navigation Bar.

For example, I want to look for the Dashboards (let's say I don't already have it pinned to my Navigation Bar), I would:

1. Click on the square icon and start typing in the word 'dash'.
2. Any items that I have access to, based on that search word, will appear. As we can see in the picture, I have an item called Dashboards that I can click on and open.
3. If I wanted to see all the tabs I can access, I can click on View All

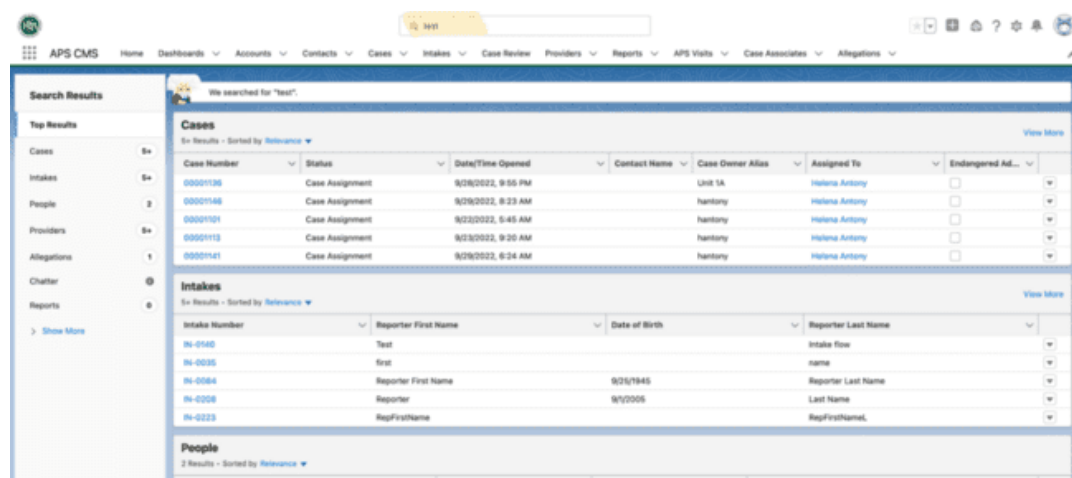


Global Search

This is the search box that sits right above the tabs (Navigation Bar). Use this box to search for any record in the system that you have access to based off of the keyword or number you enter. This search will span across all the tabs (objects) and provide you with search results.



1. For this example, I will search the keyword 'test' and hit enter. It will bring up all the records, grouped by tab (object), that contain my keyword of 'test'. It will show you the top 5 records first, and if there are more than 5 records that exist, you can click View More on the right-hand side to see every result that was returned.



List Views

When you click on each tab, you will be defaulted to see a list called Recently Viewed, this is called a List View. If you have not opened any records under that tab, you will not see any results populate in this List View. Click on the list name and you will see a drop down of different lists that have been created and filtered to show a specific set of records.

***Note-** Some of these List Views are custom built and users cannot alter them. However, users can clone any of the pre-defined lists (EXCEPT for the Recently Viewed list) or create your own lists and sort/filter them to meet your needs.

In this first screenshot, I have clicked on the Intakes tab and can see my Recently Viewed List View.

APS CMS Home Dashboard Accounts Contacts Cases Intakes Providers Reports User Manual Allegations Case Associates Calendar APS Vitals

Intakes Recently Viewed

9 items - updated a minute ago

	Intake Number	Status	Source	Victim Unit	Victim County	First Name	Last Name	Date of Birth	Created Date	Created By
1	IN-0853	New	Nursing Home Report	Unit 5	Hendricks	napo	rtur		5/9/2023, 5:36 PM	APS Tester Director
2	IN-0854	New				k	ito		5/9/2023, 5:29 PM	APS Tester Director
3	IN-0854	In Progress	Phone Call	Unit 5	Hendricks	stokes	stokes		5/9/2023, 5:21 PM	APS Tester Director
4	IN-0857	New				k	stokes		5/9/2023, 5:38 PM	APS Tester Director
5	IN-0853	Screening	Phone Call	Unit 5	Hendricks	ki	ki		5/9/2023, 12:48 PM	APS Tester Director
6	IN-0853	In Progress	Phone Call	Unit 5	Hendricks	intake specialist	reporter test		5/9/2023, 11:28 AM	APS Tester Intake Specialist

To see a different List View, click on the name of the list, and a drop down will display all the List Views that you can access (Your list may be different than that pictured below). From there, click on the list you would like to display, and it will display records based on the filter criteria defined for that list.

Intakes Recently Viewed

13 items

Q |

RECENT LIST VIEWS

- All
- Direct Intake
- ✓ Recently Viewed (Pinned list)

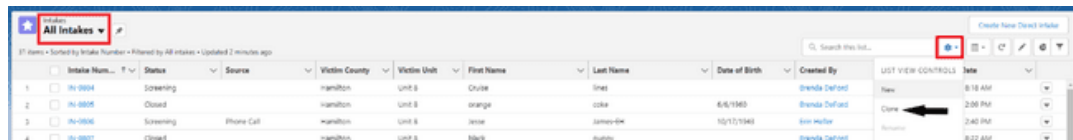
ALL OTHER LISTS

- My Referrals
- Ready for Screening
- Unit 1
- Unit 1
- Unit 1 Director
- Unit 10
- Unit 10 Director

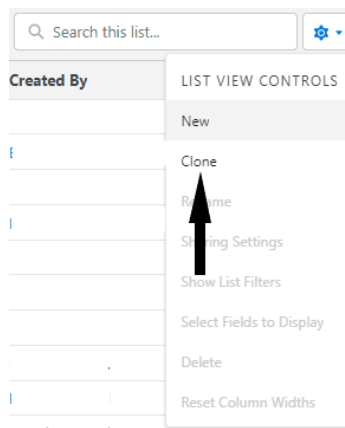
Creating a List View

You can create and filter your own List Views for any tab you have access to. For this example, I want to create a new List View that shows me all the Intakes in Adams County. I am just going to 'Clone' the 'All Intakes' List View, and then add a filter to pull only Adams county records into the list.

1. I am going to open the 'All Intakes' list view. Then I will click the gear icon to the right of the list.



2. Then I will select 'Clone'.



3. I will rename my new list 'Adams co'. It will default to an option that says, 'Only I can see this list view'. The other two options shown below are not available to select. Click Save.

Clone List View

* List Name
Adams co

Who sees this list view?

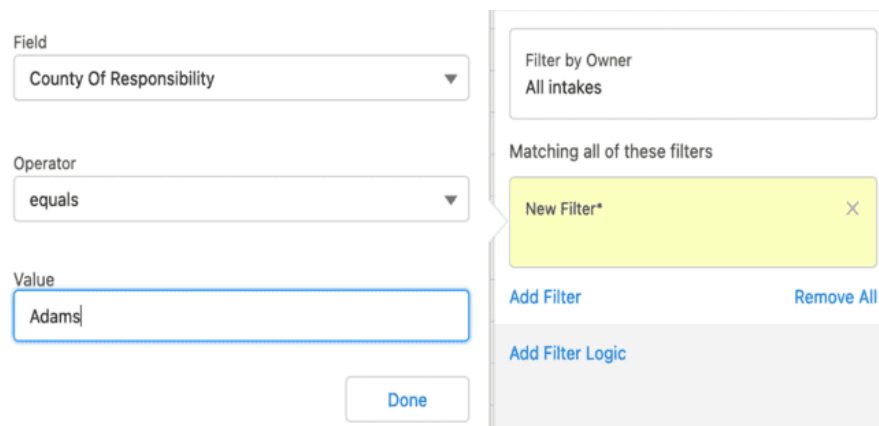
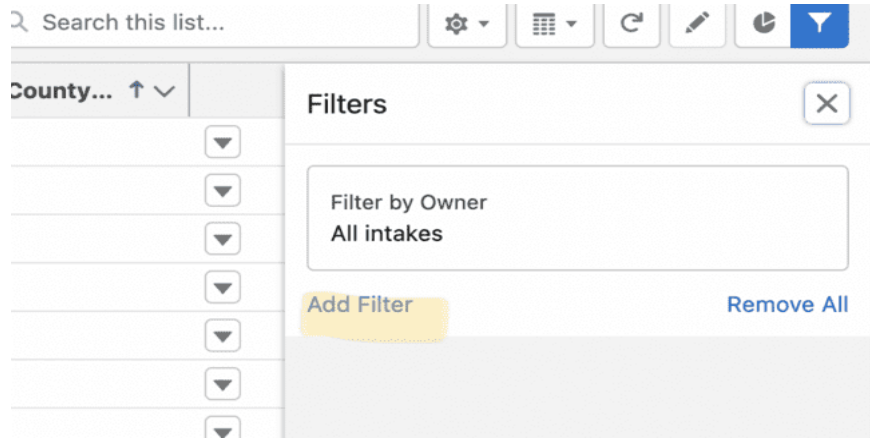
☒ Only I can see this list view

☐ All users can see this list view ⓘ

☐ Share list view with groups of users ⓘ

Cancel Save

4. The list displays, and a Filters pane will show on the right-hand side. I will click Add Filter. From that pop up, I will search for the County field, which is called County Of Responsibility. I'll select that, I will leave the 'operator' as Equals, then type in the word Adams, then click Done.



5. That is the only filter I want to add at this time, so then I will click Save. The list refreshes and shows me all the results for Intakes that are in Adams County.

Cancel

Save

Filter by Owner
All intakes

Matching all of these filters

County Of Responsibility*
equals Adams

Add Filter

Remove All

Intakes

Adams Co

Printable View Direct Intake Form Direct Intake LWC In Development

17 items - Sorted by County Of Responsibility - Filtered by All intakes - County Of Responsibility - Updated a few seconds ago

Search this list...

<input type="checkbox"/>	Intake Num...	Record Type	Report Date	Created Date	Screen Decl...	Receiver FL...	Receiver L...	Case	County ...
1	IN-0056	Direct Intake	8/1/2022	8/1/2022, 5:18 PM					Adams
2	IN-0058	Direct Intake	8/4/2022	8/4/2022, 7:33 AM	Screen In			00001100	Adams
3	IN-0067	Direct Intake	8/1/2022	8/1/2022, 12:18 PM	Screen In			00001037	Adams
4	IN-0070	Direct Intake	8/1/2022	8/1/2022, 8:44 PM					Adams
5	IN-0071	Direct Intake	8/1/2022	8/1/2022, 8:47 PM					Adams
6	IN-0074	Direct Intake	8/1/2022	8/1/2022, 9:02 PM					Adams
7	IN-0082	Direct Intake	8/1/2022	8/1/2022, 11:27 PM					Adams
8	IN-0112	Direct Intake	8/1/2022	8/1/2022, 11:29 PM					Adams
9	IN-0115	Direct Intake	8/1/2022	8/18/2022, 9:17 PM					Adams
10	IN-0116	Direct Intake	8/1/2022	8/18/2022, 6:28 AM					Adams
11	IN-0122	Direct Intake	8/2/2022	8/19/2022, 10:45 AM	Screen In			00001073	Adams
12	IN-0138	Direct Intake	8/1/2022	8/21/2022, 10:13 AM	Screen In			00001075	Adams
13	IN-0145	Direct Intake	8/22/2022	8/22/2022, 12:20 PM	Screen In			00001154	Adams
14	IN-0174	Direct Intake	8/28/2022	8/28/2022, 8:03 PM					Adams
15	IN-0181	Direct Intake	8/22/2022	8/28/2022, 9:04 PM					Adams
16	IN-0209	Direct Intake	8/22/2022	8/28/2022, 7:47 AM	Screen In			00001146	Adams
17	IN-0222	Direct Intake	10/6/2022	7:22 AM	Screen In			00001121	Adams

Filters

Filter by Owner
All intakes

Matching all of these filters

County Of Responsibility*
equals Adams

Add Filter

Remove All

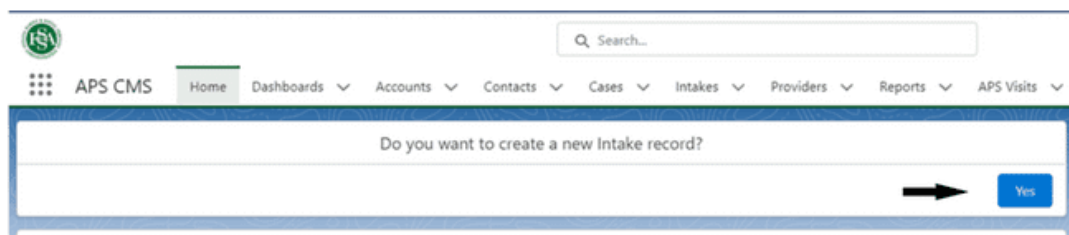
Add Filter Logic

Guidance for Success

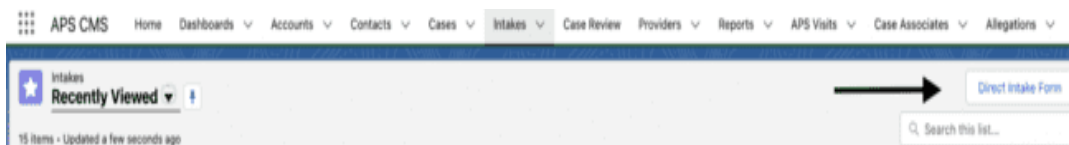
Creating a Direct Intake Report

This section describes the process of creating a Direct Intake Report from within the system. This form is like the Public Web form but can capture additional information. A user can create an Intake report in one of two places: from the *Home* tab or from the *Intakes* tab. The saved record can be found under the *Intakes* tab. Any report that is submitted via the Public Web form will also show up under the *Intakes* tab.

- 1) To create the Intake Report from the *Home* tab, click the **Yes** button under 'Do you want to create a new Intake record?'



- 2) To create the Intake Report from the *Intakes* tab, click the **Direct Intake** button.



- 3) The Direct Intake form contains the following sections, which span several pages.

- Search Contact, General Information, and Reporting Person
- Alleged Victim
- Alleged Perpetrator
- Allegations and Risk Factors in the Home
- Case Reference Information
- Assignment Tracking

The following images show what each page looks like. Fields with a red asterisk near their label are required to be filled out before the record will be saved. At the bottom of each page is a **Save & Next** button and a **Previous** button. Use these to navigate forward or backward in the form. Do not use your browser's back button.

Image: Search Contact option collapsed, General Information, and Reporting Person page

> Search Contact

GENERAL INFORMATION

Source

--None--

Incident Date

* Reported Date

REPORTING PERSON

Reporter Unknown

☐

Outside Indiana

☐

First Name

* Last Name

* Reporter Relationship to Alleged Victim

--None--

Additional Information About Reporter

Reporting Person County

--None--

Reporter Email

Reporter Phone Number

Phone Ext

Incident Report Number

Previous

Save & Next

Image: Search Contact option extended

✓ [Search Contact](#)

First Name

Last Name

County

--None--

Unit

--None--

Search

First Name	Last Name	SSN	Phone Nu...	Address	County	Unit	Deceased

Image: Alleged Victim page

Direct Intake

Add Victim

Click the Add Victim button

First Name	Last Name	Phone Number	Address	County	Action
------------	-----------	--------------	---------	--------	--------

Previous

Save As New

Create Alleged Victim

ALLEGED VICTIM

Name Unknown

*First Name

Alleged

*Last Name

Victim

Middle Name

Prefix

Suffix

Street Address Unknown

*Street Address

123 Main Street

Street Address 2

City

State

IN

Zip Code

*County

Hamilton

Phone Number

Approximate Age

Date Of Birth

Gender

--None--

Race

--None--

Ethnicity

--None--

Veteran

--None--

Self Neglect

Social Security Number

Medicare Number

Has Medicaid

--None--

Medicaid Number

Height - Feet

Height - Inches

Weight(Pounds)

Other Identifying Characteristics

Physical Disabilities

Describe how the alleged victim is incapacitated

Location

--None--

Describe any injuries or other

Impairment

Available

Addictive Disorder - Alcohol

Addictive Disorder - other drug

Other Mental Illness

Neurodevelopmental Disorder

Chosen

Current Services

Available

Affordable Housing

Counseling

Emergency Temporary Shelter

Guardianship

Chosen

Intake

IV-0642

Case Associate Type

Alleged Victim

Close

Save

21

Image: Alleged Perpetrator

New Alleged Perpetrator

> Search Contact

ALLEGED PERPETRATOR

Perpetrator Unknown ☐

First Name

Phone Number

Gender

Perpetrator County

Height - Feet Height - Inches

Other Identifying Characteristics

* Relationship to Alleged Victim

Alert ☐

Intake

Outside Indiana ☐

* Last Name

Approximate Age

Race

Ethnicity

Weight(Pounds)

Physical Disabilities

Describe the alleged abuse

Case Associate Type

Image: Allegations and Risk Factors in the Home page

ALLEGATIONS

Allegations

Available

Battery (confinement)

Battery (medication Errors)

Battery (Pain/Injury)

Battery (Rape)

Chosen

Risk Factors in the Home

Available

Weapons in the house

Communicable illnesses

Police have been called to the house in the ...

Drugs in the house

Chosen

Explain Other For Allegations

Explain Other for Risk Factor in Home

Location of Alleged Abuse

Image: Case Reference Information page

CASE REFERENCE INFORMATION

Law Enforcement Case Number

Justice Department Cause Number

Image: Assignment Tracking page

ASSIGNMENT TRACKING

Receiver First Name
Stephanie

Receiver Last Name
Etheridge

Victim County
--None--

Previous Save & Next

- 4) Following are details regarding the Direct Intake form and some of the fields you will see:
- There are **Previous** and **Save & Next** buttons at the bottom of each page. Use these to navigate through the form. Using the **Previous** button will not cause you to lose information already entered.
 - You will not be able to advance through the form if required fields (marked with an *****) are not completed.
 - Some fields become visible, or hidden, based on the response entered in another field. Those that become visible are required fields. They are as follows:
 - Alleged Victim Section:** If the *Victim's Name Unknown* checkbox is checked, then *First Name* field will become hidden, *Last Name* will display "Unknown", and a text box called *Describe the Victim* will become visible.
 - Alleged Victim Section:** If the *Street Address Unknown* checkbox is checked, then the *Street Address* and *Zip Code* fields will become hidden, and a text box called *Address Description* will become visible.
 - Alleged Perpetrator Section:** If the *Perpetrator Unknow* checkbox is checked, then the *First Name* field will become hidden, *Last Name* will display "Unknown", and a text box called *Describe the Perpetrator* will become visible. If the *Alert* checkbox is checked, a text box called *Describe the alert* will become visible.
 - Assignment Tracking Section:** You have reached the last page of the form when you come to the Assignment Tracking Section.

There are three fields in this section, and they will automatically populate with data.

- i) *Receiver First Name* and
- ii) *Receiver Last Name* will display the name of the staff who created this Intake. These can be changed if needed.
- iii) *Victim County* will display the County that was entered in the Alleged Victim's section of the form. The county listed here will determine which Unit gets notified that they have a new Intake Report being assigned to them.
- e) Once you click **Save & Next**, you'll see a 'Thank you for Submitting' banner display on the screen. The Intake record has been created and assigned an Intake Number. Click **Finish**. Navigate to the *Intakes* tab to see the new Intake Report record in the List View with its assigned Intake Number.

Viewing or Editing Intake Reports

To view/edit/update an Intake Report, follow the steps below:

1. From the Intakes tab, find and open the appropriate Intake Report. You can also use the global search bar to search for the Intake as well by entering any type of keyword that was associated with that Intake.
2. The Detail page of the Intake record will open. There are four main things to note here. These are numbered in the screenshot below.
 - a. Item 1- The buttons near the top of each record are called Quick Action buttons.
 - b. Item 2- This is called a Path, and it has different Statuses, aka Stages. When an Intake Report record gets created, it will automatically start at the **New** status. When ready to start processing the report, you can simply click the blue **Mark Status as Complete** button to the far right of the path, and it will move it to In Progress, OR you can click on In Progress and then click the blue **Mark Status as Complete** button, either way will set the status. The same applies for moving it to Screening and so on.
 - c. Item 3- This is the Details page of the report. You will notice that only a section called **General Information** is visible. To see all the details about Reporting Person, Alleged Victim, and Alleged Perpetrator, click on the section that says 'Additional Fields'.
 - d. Item 4- The sections on the right-hand side of the page are called Related Lists. They house any other record, such as the Case record if the Intake becomes a Case, any Notes that are documented regarding this Intake, any associated Allegations, etc.

1. Quick Action buttons

2. Path - Lets you know in which stage of the process this Intake Report is.

3. Details page with collapsible sections.

4. Related Lists

3. To make Edits or Update information, there are two options:

- Click the **Pencil** icon next the field you want to edit (seen in screenshot above);
- Click the **Edit Intake** button, this will bring up the form, but it will be broken down into smaller sections over a few pages. Use the **Previous** and **Save & Next** buttons to navigate through the form. (Only first page of form is shown in screenshot below)

GENERAL INFORMATION

Source: [Dropdown] Incident Date: [Date]

Reported Date: Feb 14, 2023

REPORTING PERSON

Reporter: Unknown

Out-of-State Indiana: [Checkbox]

First Name: [Text] Last Name: [Text]

Reporting Person: [Text]

Relationship to Alleged Victim: [Dropdown]

Additional Information about Reporter: [Text]

Reporting Person County: [Dropdown]

Reporter Email: [Text]

Reporter Phone Number: [Text] Incident Report Number: [Text]

Previous Save & Next

Searching/Creating/Linking Contacts

Users can search for existing Contacts and link them to an Intake. If the Contact does not exist, a user can create a new Contact and link it to an Intake.

Searching from the Intake

1. From the Intake report, click the **Create Contact** quick action button towards the top of the page.
2. Click the down arrow in the 'Select Associate' drop-down box, all the associates connected to the Intake will appear in the drop-down list. Select one from the list to which you want to link a Contact. If a Contact is already linked to this Associate, then the linked Contact's name will appear next to the Contact label, otherwise No Contact Associated will appear (outlined in red in image below).

The screenshot shows the 'Create Contact' interface. At the top, there's a 'Select Associate' dropdown menu currently showing 'Reporting Person'. An arrow points to the dropdown arrow. To the right of this dropdown, the text 'Contact No Contact Associated' is displayed and highlighted with a red rectangular border. Below the dropdown are input fields for 'First Name' (with the value 'Reporting') and 'Last Name' (with the value 'Person'). To the right of these are 'County' and 'Unit' dropdown menus, both showing '--None--'. A blue 'Search' button is located to the right of the 'Unit' dropdown. Below these fields is a table with headers: 'First Name', 'Last Name', 'SSN', 'Phone N...', 'Address', 'County', 'Unit', and 'Deceased'. The table body is empty. At the bottom left of the form are two buttons: 'Link Contact' and 'Create New Contact'.

3. Clear the values in the First Name and Last Name fields or change them to the name you want to search. You can also enter a County and a Unit, or any combination of these four fields.

4. Click the **Search** button.

- If **NO** results show up, the system did not find any existing Contacts that match your search terms (see below).

The screenshot shows the 'Create Contact' form. At the top, it says 'Create Contact'. Below that, there's a section for '*Select Associate' with a dropdown menu set to 'Reporting Person'. To the right, it says 'Contact No Contact Associated'. Below this, there are input fields for 'First Name' (empty), 'Last Name' (containing 'Elmer'), 'County' (dropdown set to '--None--'), and 'Unit' (dropdown set to '--None--'). A blue 'Search' button is to the right of these fields. Below the search fields is a table with columns: First Name, Last Name, SSN, Phone N..., Address, County, Unit, and Deceased. The table is currently empty. At the bottom, there are two buttons: 'Link Contact' and 'Create New Contact'.

- If there **ARE** results that show up, the system found existing Contact records based on your search terms (see below).

The screenshot shows the 'Create Contact' form with search results. The 'First Name' field now contains 'test'. The 'Search' button is blue. Below the search fields, the table now contains three rows of results:

First Name	Last Name	SSN	Phone N...	Address	County	Unit	Deceased
<input type="radio"/> Test	Alleged Victim			123 Main StreetBedford47421	Lawrence		
<input type="radio"/> Test Contact 2	APS Test 2			34 Main StCarmelIndiana46033	Hamilton		
<input type="radio"/> Test Referral	Victim Last Name		123-412-4111		Lake		

At the bottom, there are two buttons: 'Link Contact' and 'Create New Contact'.

Creating/Linking Contacts

1. If the Contact record already exists, click the radio button next to the record, and click **Link Contact**.
2. If the Contact does not already exist, click **Create New Contact**. A form will appear for you to fill in additional details regarding this new contact.
3. Enter all the information you have about this contact, scroll for additional fields, then click **Save**.

The screenshot shows a web form titled "Create new Contact". The form is divided into two main sections: "DETAILS" and "DEMOGRAPHICS INFORMATION".

DETAILS Section:

- Salutation: Dropdown menu with "--None--" selected.
- Type: Dropdown menu with "Reporting Person" selected.
- First Name: Text input field containing "Test".
- * Last Name: Text input field containing "Contact".
- Date Of Birth: Text input field with a calendar icon.
- Approximate Age: Text input field.
- County: Dropdown menu with "--None--" selected.
- Email: Text input field.
- Has Medicaid: Dropdown menu with "--None--" selected.
- Medicaid Number: Text input field.
- Medicare Number: Text input field.
- Phone: Text input field.
- Address: A large text input field with a search icon.
- Street: Text input field.
- City: Text input field.
- State/ Province: Text input field.
- Zip/ Postal Code: Text input field.
- Country: Text input field.
- Outside Indiana: Checkbox (unchecked).

DEMOGRAPHICS INFORMATION Section:

- Gender: Dropdown menu with "--None--" selected. Next to it is a "Specify Other Gender" text input field.
- Race: Dropdown menu with "--None--" selected. Next to it is an "Other Race Specify" text input field.
- Marital Status: Dropdown menu with "None" selected. Next to it is a "What is your pri-" text input field.

4. Once saved, you will see a green "Success" message.

- To view the Case Associate's linked Contact, click a Case Associate -XXXX link in the related list on the right-hand side of the Intake page (left image below). The Case Associate page will display with the Case Associate Name and the linked Contact (right image below).

The left screenshot shows the 'Case Associates (3)' section on an intake page. It lists three case associates with their roles and case numbers. Arrows point to each entry: 'Case Associate-1724' (Reporting Person), 'Case Associate-1725' (Alleged Perpetrator), and 'Case Associate-1726' (Alleged Victim). The right screenshot shows the 'Case Associate-1724' details page. A red box highlights the 'Contact' field, which is linked to 'Test Contact'.

- To view the linked Contact's information, click the Contact's name. The Contact's Details page will display.
- To edit the Contact's details either click the **Edit** button in the upper right corner (see image below) or click the pencil icon next to the field you want to edit.
- Note: the user can make a contact Inactive by clicking the pencil icon next to the Inactive field and then checking the box (outlined in red in the image below).

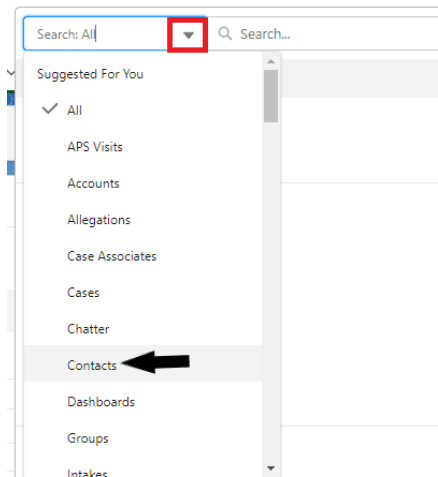
The screenshot shows the 'Contact Test Contact' details page. The 'Inactive' checkbox is highlighted with a red box. An arrow points to the 'Edit' button in the top right corner.

Edit Existing Contacts

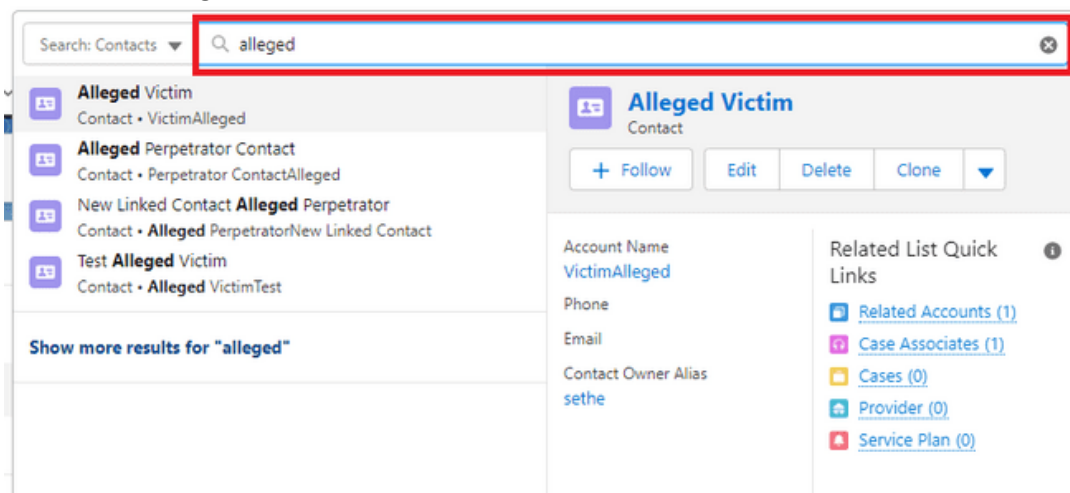
1. Search for the Contact you want to edit by clicking in the global search bar at the top of the page (it does not matter which tab you have highlighted).



2. Click the down arrow (in red box below), and then click Contacts



3. Begin typing the Contact name in the Search box and a list of possible matches will display. If you see the Contact listed, you can click on the name of the Contact in the displayed list to open it for editing. Otherwise, hit the Enter key on your keyboard and a list of potential matches will display. Click on the name of the Contact to open the record for editing.



- With the Contact record open, a user can either click the **Edit** button in the upper right corner, this will open the Edit page, or a user can click on the pencil icon next to the field they wish to edit (in red boxes below). After making the desired edits, click the blue **Save** button at the bottom of the page (not shown in image below).

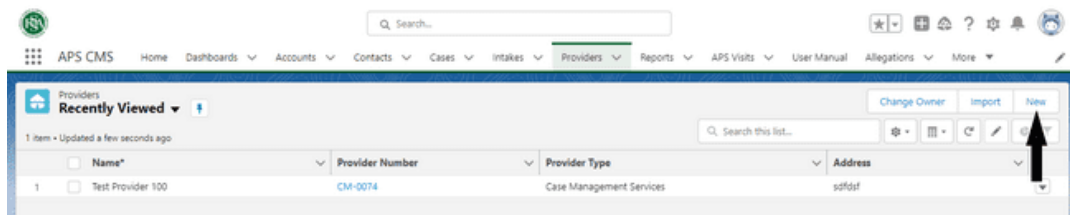
Creating/Linking Providers

Create New Provider

There are two ways to create a Provider without linking it to a Case or Intake.

- From the *Home* tab, click on the **Yes** button in the *Do you want to create a new Provider record?* section.

2. OR, From the *Providers* tab, click on the **New** button.




Fill in the details about the Provider on the page that displays and then click **Save**. This Provider will now be available to link to Intakes and Cases.

Search/Link Facilities

Facilities can be linked and tracked from the Intake Report using the Link Provider quick action button.

1. From the Intake report, click the **Link Provider** quick action towards the top of the page.
2. Enter the Name of the Provider, or at least part of the name. This is required when searching for the Provider you want to link.
 - **Provider Type:** From this drop-down you can select the specific Provider type you are looking for along with the name(optional)
 - **Provider County:** Here you can select which county the Provider is in(optional)
 - **Unit:** Here you can select which Unit the Provider may be associated with(optional)
3. Click **Search**.
 - Based on your search terms, a list of Facilities will display. Once you find the correct Provider, check the box to the left of the name, and click **Link Facility**. This Provider will now have an association to the Intake Report and can be found in the *Link Providers* related list.


Facility Search

Name*

Provider Type

--None--

County for Provider

--None--

Unit

--None--

<input type="checkbox"/>	Facility Name	Facility Type	County for Facilities	Unit
<input type="checkbox"/>	Urology of Indiana	Healthcare Facility	Hamilton	UNIT 8
<input type="checkbox"/>	Independent Adult Care Day Care Centers North	Adult Day Center	Hamilton	UNIT 8
<input type="checkbox"/>	Howard the duck	Physicians	Hamilton	UNIT 8
<input type="checkbox"/>	IU North Hospital	Healthcare Facility	Hamilton	UNIT 8
<input type="checkbox"/>	Hoosier Village	Nursing Home	Marion	UNIT 8
<input type="checkbox"/>	Radha 3		Allen	UNIT 1
<input checked="" type="checkbox"/>	ACME Healthcare	Healthcare Facility		
<input type="checkbox"/>	North Park Nursing Home	Nursing Home	Vanderburgh	UNIT 13B

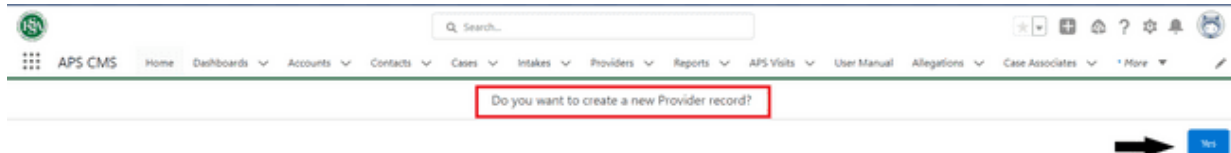
Search

Link Facility

Create Providers

Create New Provider from an Intake Report

1. From the Intake report, click the **Link Providers** quick action towards the top of the page.
2. Perform the search as mentioned above to ensure your Provider doesn't already exist.
3. Click Create Providers, a message will appear asking if you want to create a new Provider record. Click Yes.



4. Enter in the new Provider details, then click the blue **Finish** button in the bottom right corner (not shown in image below). This Provider should now show in the list of facilities the next time the search is performed.

Provider Form

Provider Details

<input checked="" type="checkbox"/> Active	Address
* Name	
	Zip
City	
	State
County	Indiana
--None--	Facility Type
Unit	--None--
--None--	

Contact Information

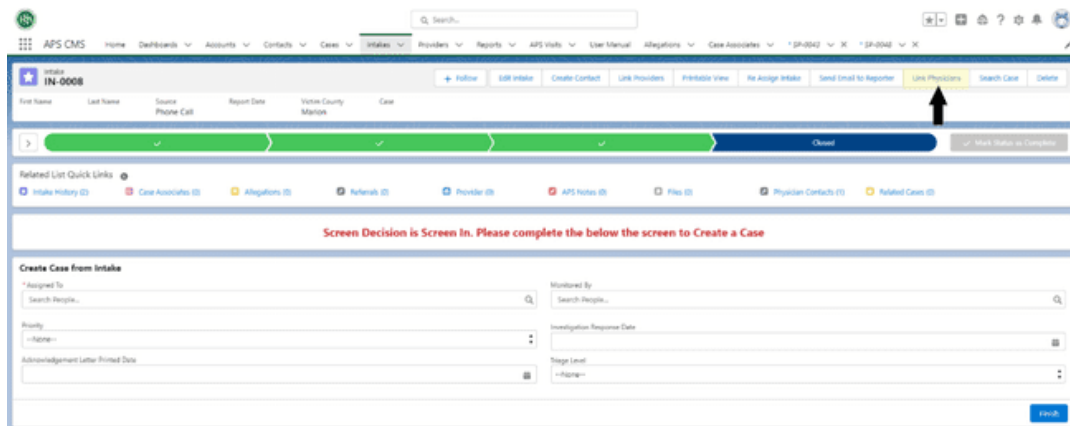
Business Phone Number	Extn
Home Phone Number	Extn
Phone Number	Extn
Direct Phone Number	Extn
Mobile Phone Number	
Pager	
Fax	

Linking Physicians

Physicians can be linked and tracked from the Intake Report using the Link Physicians quick action button.

Search/Link Physicians

1. From the Intake report, click the **Link Physician** quick action towards the top of the page.



The screenshot displays the APS CMS Intake report interface. At the top, there is a navigation bar with various menu items including Home, Dashboards, Accounts, Contacts, Cases, Intakes, Providers, Reports, APS Info, User Manual, Allegations, Case Associates, and SH-0042. Below the navigation bar, the main header shows 'Intake IN-0008' with a search bar and several action buttons: Follow, Edit Intake, Create Contact, Link Physicians, Printable View, Re Assign Intake, Send Email to Reporter, Link Physicians (highlighted with a black arrow), Search Case, and Delete. Below the header, there is a table with columns for First Name, Last Name, Source, Report Date, Victim County, and Case. A progress bar is visible below the table. Further down, there is a section titled 'Screen Decision is Screen In. Please complete the below the screen to Create a Case'. This section contains a form with fields for Assigned To, Searched By, Priority, Investigation Response Date, Acknowledgment Letter Printed Date, and Stage Level. A 'Print' button is located at the bottom right of the form.

2. Users can search for existing Physician Contacts by the following fields:

- Contact Name
- Specialty
- Group
- County
- Unit
- Or search all contacts by leaving all options blank

3. Click **Search**.

Based on your search terms, a list of physicians will display. If you find the correct physician, check the box to the left of the name, and click **Link Physician**. This physician will now have an association to the Intake Report. If the physician you are searching for does not exist you can create a new physician contact. (See instructions in **Create New Physician Contact** section below.)

The **Physician Search** window includes the following search filters:

- Search Contact Name: type contact first or last name...
- Search Speciality: type sepciality...
- Search Group: type group...
- County: --None--
- Unit: --None--

The results table is as follows:

<input type="checkbox"/>	Contact Name	Physician Key Number	Speciality	Group	County for Provider	Unit
<input type="checkbox"/>	Test Test Contact					
<input checked="" type="checkbox"/>	Compton	PK -0013	Eye Specialist	Eye		UNIT 1
<input type="checkbox"/>	Rachel Henderson	PK -0009				
<input type="checkbox"/>	Jen Mayflower					
<input type="checkbox"/>	Mr X					
<input type="checkbox"/>	Test Test					
<input type="checkbox"/>	doe					
<input type="checkbox"/>	Mrs Lady					

Buttons at the bottom: **Search** and **Link Physician**.

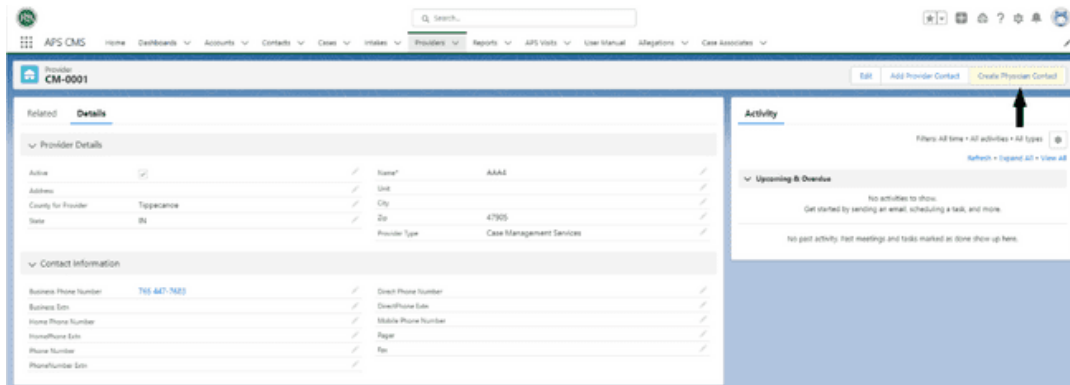
4. Access the linked physician from the *Related List Quick Links* bar near the top of the Intake record (see arrow in first image below), or from the *Related Lists* at the right-hand side of the Intake record (see red box in second image below).

The first screenshot shows the top of the Intake record for **IN-0008**. The **Related List Quick Links** bar includes: Intake History (2), Case Associates (2), Allegations (2), Referrals (2), Provider (2), APS Notes (2), Files (2), **Physician Contacts (1)** (highlighted with an arrow), and Related Cases (2).

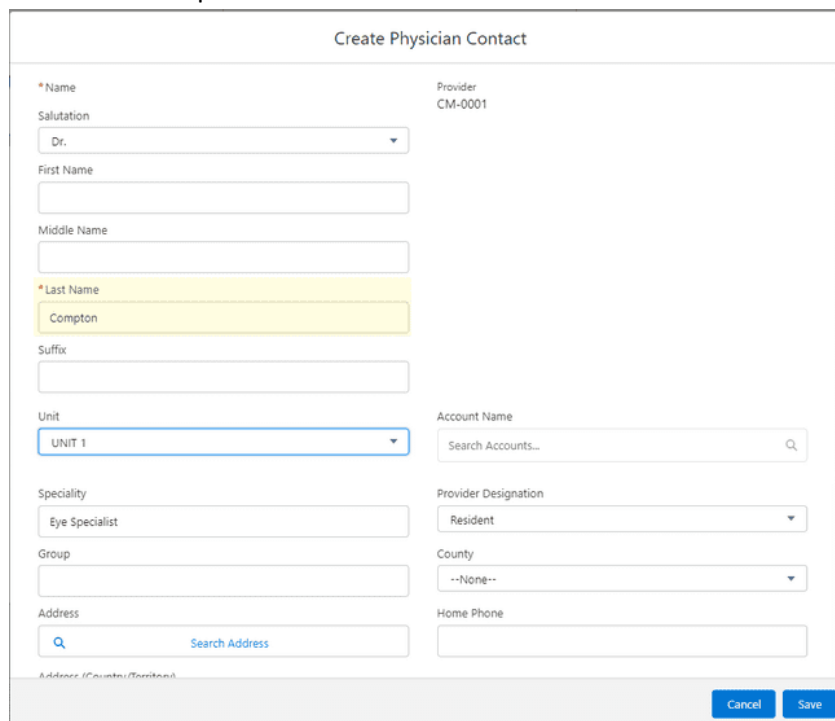
The second screenshot shows the full Intake record details. On the right-hand side, the **Related Lists** panel includes: Case Associates (2), Allegations (2), Referrals (2), Provider (2), APS Notes (2), Files (2), **Physician Contacts (1)** (highlighted with a red box and an arrow), and Related Cases (2). The **Physician Contacts (1)** list shows: **Compton**, Speciality: Eye, Unit: UNIT 1.

Create New Physician Contacts

- From the *Providers* tab, open a Provider record from the List View by clicking the blue link in the Provider Number column. Click the **Create Physician Contact** button in the upper right corner.

The screenshot shows the APS CMS interface for a Provider record (CM-0001). The top navigation bar includes links for Home, Dashboards, Accounts, Contacts, Cases, Intakes, Providers, Reports, APS Visits, User Manual, Allegations, and Case Associates. The main content area is divided into two sections: 'Details' and 'Activity'. The 'Details' section contains 'Provider Details' and 'Contact Information' tabs. The 'Contact Information' tab is active, showing fields for Business Phone Number, Business Email, Home Phone Number, Home Phone Email, Phone Number, and Phone Number Email. The 'Activity' section shows a list of activities with a filter for 'All time' and 'All types'. The 'Create Physician Contact' button is highlighted in the top right corner of the 'Details' section with an arrow.

The *Create Physician Contact* form will pop up. Enter the physician's information. The *Last Name* field is required, all other fields are optional.

The screenshot shows the 'Create Physician Contact' form. The form is titled 'Create Physician Contact' and includes fields for Name, Salutation, First Name, Middle Name, Last Name (highlighted in yellow), Suffix, Unit, Account Name, Speciality, Group, Address, Provider Designation, County, and Home Phone. The 'Last Name' field is highlighted in yellow. The 'Unit' dropdown menu is set to 'UNIT 1'. The 'Account Name' field has a search icon. The 'Speciality' dropdown menu is set to 'Eye Specialist'. The 'Provider Designation' dropdown menu is set to 'Resident'. The 'County' dropdown menu is set to '--None--'. The 'Address' field has a search icon and a 'Search Address' link. The form has 'Cancel' and 'Save' buttons at the bottom right.

- Click **Save**.
- Follow the steps in the **Search/Link Physicians that already exist** section above to associate this physician with an Intake record.

APS Notes

APS Notes can be documented directly from the related lists on the right-hand side of the Intake Report page.

1. From the Intake report, find the APS Notes related list
2. Click the drop-down arrow on the list itself, then click New. The Note form will pop up for you to document your notes. Once saved, it will display in the related list.

The screenshot illustrates the process of creating and viewing APS Notes. It is divided into two main sections: the 'New APS Note' form and the 'APS Notes (1)' list.

New APS Note Form:

- Information:** Fields for Note ID, Case (with a search bar), Action Date (11/8/2022), Owner (Kristen and Stephanie Stokes), and Intake (IN-0257).
- Detailed Notes:** A rich text editor with a toolbar (font, size, bold, italic, link, unlink, bulleted list, numbered list, indent, outdent, undo, redo) and a text area containing 'test notes here on 11/8/22'.
- Buttons:** Cancel, Save & New, and Save.

APS Notes (1) List:

- Notes-0026:** A note entry with a dropdown arrow.
- Metadata:** Author: Kristen and Stephanie Stokes, Entry Date: 11/8/2022, 7:08 PM, Notes: test notes here on 11/8/22.
- Action:** View All link.

Allegations

Allegations can be documented directly from the related lists on the right-hand side of the Intake Report page.

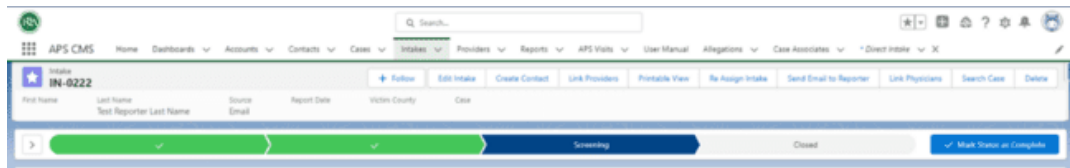
1. From the Intake report (if appropriate to document at the Intake), find the Allegations related list
2. Click the drop-down arrow on the list itself, then click New. The Allegation form will pop up for you to document. Once saved, it will display in the related list.

The screenshot shows the 'Intake First Name Reporting' page. On the right-hand side, there is a sidebar with a list of related items. The 'Allegations (1)' list is highlighted, and a black arrow points to the drop-down arrow next to it. The main content area shows various fields for the intake report, including 'Additional Information', 'Reporting Person', 'County', 'Medical Professional', 'Acknowledgement', 'Letter Printed Date', 'Incident Report Number', and 'Additional Information Medical Professional'.

The screenshot shows the 'New Allegation' form. The form is divided into several sections: 'Information', 'Finding', 'Action Type', and 'System Information'. In the 'Information' section, the 'Allegation Name' is 'Relative's Home', the 'Location' is 'Relative's Home', and the 'Allegations' section shows a list of available allegations (Exploitation (Financial), Exploitation (Physical), Exploitation (Sexual), Exploitation (Trafficking), Self-Neglect) and a list of chosen allegations (Neglect, Other). The 'Owner' is 'Kristen and Stephanie Stokes', the 'Membership' is 'Member-0272', the 'Intake' is 'IN-0257', the 'Case' is 'Search Cases...', and the 'Endangered Adult' is '--None--'. In the 'Finding' section, the 'Finding' is '--None--'. In the 'Action Type' section, the 'Criminal Action' is '--None--' and the 'Services Provided' checkbox is unchecked. The 'System Information' section at the bottom has 'Cancel', 'Save & New', and 'Save' buttons.

Screening Out/Screening In

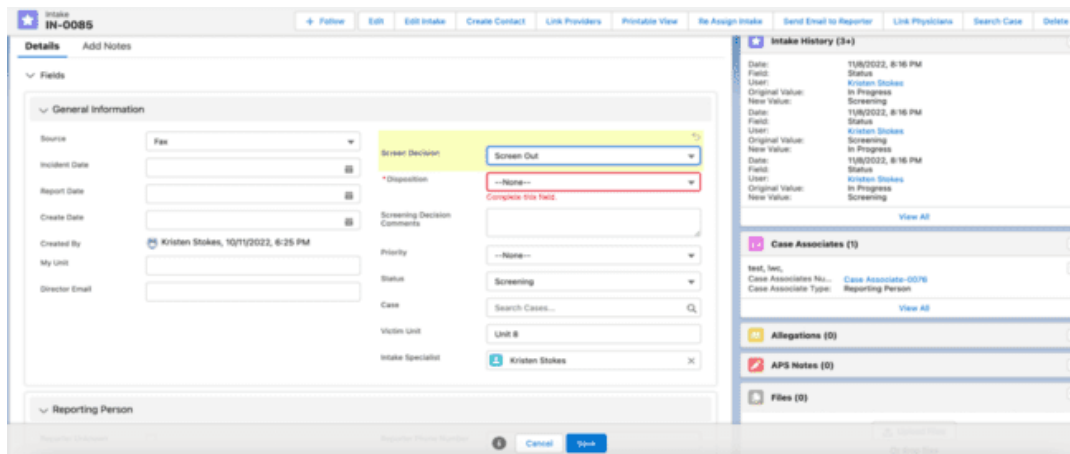
Once the Intake Report has been completed as much as possible, you will move the *Path* (shown below) to the Screening status OR mark the Status in the General Information section as Screening, and the respective Unit Director will be notified.



The screenshot shows the APS CMS interface with a search bar at the top. Below the navigation menu, the 'Intake' section is active, displaying a progress bar with four stages: 'Intake' (completed), 'Screening' (active), 'Closed', and 'Make Status as Complete'. The 'Intake' stage is highlighted in green, and the 'Screening' stage is highlighted in blue.

Screened Out

1. See the General Information section towards the top of the Intake report. There are three key fields here to Screen Out the intake:
 - Screening Decision- choose Screen Out
 - Disposition-this will appear when Screen Out is selected, and is a required field
 - Screening Decision Comments-You must enter a description here as to why this Intake is closing out. If it is left blank upon Save, an error will pop up stating that you must enter something here



The screenshot shows the 'Details' view of an Intake Report (IN-0085). The 'General Information' section is expanded, showing fields for Source, Incident Date, Report Date, Create Date, Created By, My Unit, and Director Email. The 'Screening Decision' dropdown is set to 'Screen Out', and the 'Disposition' dropdown is set to 'Screen Out'. The 'Screening Decision Comments' field is highlighted in red, indicating it is a required field. The 'Status' dropdown is set to 'Screening'. The 'Intake History' section on the right shows a list of previous intakes with their dates, times, and statuses.

Screened In

1. See the General Information section towards the top of the Intake (shown above)
2. Select 'Screen In' for the Screening Decision. If any required information from the report is missing, the system will prompt you to complete those before you can move on.

Cases

Create and View a Case

1. Once you Save (after completing Step 2 in **Screened In**), you will see the area outlined in red below. At a minimum, designate who the Case needs to be Assigned To (required field).
2. Click the **Finish** button to create the Case.

Screen Decision is Screen In. Please complete the below the screen to Create a Case

Create Case from Intake

Assigned To:

Monitored By:

Priority:

Acknowledgment Letter Printed Date:

Investigation Response Date:

Triage Level:

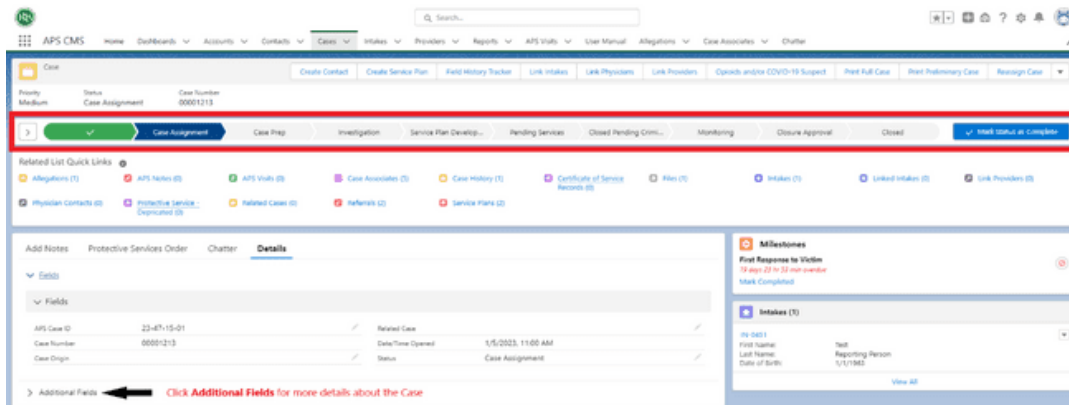
3. Users can find their assigned cases by navigating to the **Cases** tab and viewing the **My Cases** List View. To view a Case, click on the blue Case Number.

My Cases (1 selected)

1 item • Sorted by Case Number • Filtered by My cases • updated a few seconds ago

Case Number	Contact Name	Subject	Status	Priority	Date/Time Opened	Case Owner Alias
00001105			Case Assignment	Medium	11/22/2022 12:52 PM	Isaac

Image: Case Path



Like the Intake Report, a Case has a Path with various statuses which can be Marked as Complete to move the Case through its lifecycle. As each status is marked complete it turns green and the current status becomes blue (see image above).

Statuses of a Case:

- New
- Case Assignment
- Case Prep
- Investigation
- Service Plan Development
- Pending Services
- Closed Pending Criminal Action
- Monitoring
- Closure Approval
- Closed

Clicking on **Additional Fields** (see image above) will display additional information about the case.

When expanded, Additional Fields will show information under the following headings:

- Case Assignment Information
- Triage and Priority
- Assessment
- Findings
- Criminal
- Protective Services Order
- Adjudication
- Emergency Fund Tracking
- Protective Services Order
- Case Closure Information
- If Victim Deceased
- Address Information
- System Information

Note regarding the Protective Order Services section on Cases:

- Under the Protective Order Services section, if the *Protective Services Order Issued* checkbox is checked then the information in the Adjudication section will appear and will be required (see image below). Click the blue **Save** button.

The screenshot shows two sections: 'Protective Services Order' and 'Adjudication'. In the 'Protective Services Order' section, the 'Protective Services Order Issued' checkbox is checked. The 'Adjudication' section contains three fields: 'Adjudication Complete' (checked), 'Cause Number' (text input with placeholder 'Cause number goes here.'), and 'Disposition' (text input with placeholder 'Disposition goes here.').

Note regarding the Emergency Fund Tracking section on Cases:

- If the Emergency Spending checkbox is checked then an Emergency Spending Categories field will display. Select one or more items from the Available column and use the right-facing arrow between the Available and Chosen columns to move your selections to Chosen, the left-facing arrow will remove a selected value from Chosen. Click the blue **Save** button.

The screenshot shows the 'Emergency Fund Tracking' section with the 'Emergency Spending' checkbox checked. Below it is the 'Emergency Spending Categories' field, which is a two-column list. The 'Available' column contains: Legal Services, Transportation, Clothing, and Physical or Psycholo... The 'Chosen' column contains: Food and Utilities. Arrows between the columns allow for moving items. Below this section are several expandable sections: 'Case Closure Information', 'If Victim Deceased (Read only - Use 'Update Deceased Victim' Button)', 'Address Information', and 'System Information'. At the bottom right are 'Cancel' and 'Save' buttons.

Updating information for a deceased victim

1. If Victim is deceased find and click the **Update Deceased Victim** button on the quick action button bar.

The screenshot shows the APS CMS interface. On the left, there's a sidebar with various case management options. The main area displays the 'If Victim Deceased' section, which includes fields for 'Victim Deceased', 'Victim Deceased Date', 'Victim Death Reporting Source', 'Deceased Victim Name', and 'Victim Death Reporting Date'. A red box highlights the 'Update Deceased Victim' button in the quick action bar on the right.

2. A Victim Details page will display with a list of Contacts associated with this Case. Click the **Edit** button next to the Contact that is deceased.

The screenshot shows the 'Victim Details' page. It contains a table with columns: 'Victim Deceased', 'Deceased Victim Name', 'Victim Deceased Date', 'Victim Death Reporting Date', 'Victim Death Reporting Source', and 'Edit'. There are three rows of data. The third row, labeled 'Victim Alleged', has an arrow pointing to its 'Edit' button.

Victim Deceased	Deceased Victim Name	Victim Deceased Date	Victim Death Reporting Date	Victim Death Reporting Source	Edit
1	Person Reporting				Edit
2	Perpetrator Contact Alleged				Edit
3	Victim Alleged				Edit

3. On the page that displays, click the *Victim Deceased* checkbox and the *Victim Death Reporting Source* and *Victim Death Reporting Date* fields become required. Enter the information and click the blue **Update Deceased Victim** button.

The screenshot shows the 'Victim Details' page with the 'Victim Deceased' checkbox checked. The 'Victim Death Reporting Source' field is set to 'Son of victim' and the 'Victim Death Reporting Date' field is set to 'Feb 21, 2023'. The 'Update Deceased Victim' button is highlighted in blue.

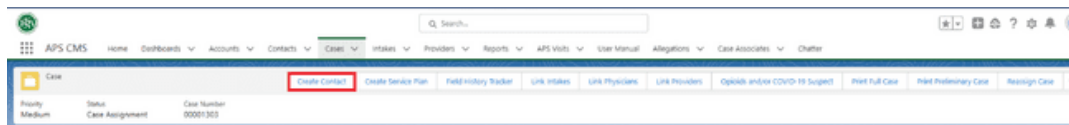
4. The Contact record will be updated, and IF the contact was the Primary Victim on the Case, the updated information will also appear in the If Victim Deceased section on the Case page (see image below).

The screenshot shows the 'If Victim Deceased' section with the 'Victim Deceased' checkbox checked. The 'Deceased Victim Name' is 'Alleged Victim' and the 'Victim Death Reporting Date' is '2/21/2023'. The 'Victim Death Reporting Source' is 'Son of victim'.

Create/Link Contacts from Case

Users can link a Contact to a Case.

1. From the Case page for the Case to which you wish to link a Contact, click the **Create Contact** quick action button.



2. Search for an existing Contact by First Name, Last Name, County, Unit, or a combination of any of these. Click the blue **Search** button.

A screenshot of the 'Search/Create Contact' form. At the top, the title 'Search/Create Contact' is centered. Below it, there are four input fields: 'First Name', 'Last Name', 'County' (with a dropdown menu showing 'Hamilton'), and 'Unit' (with a dropdown menu showing '--None--'). A blue 'Search' button is to the right of these fields. Below the search fields is a table with columns: First Name, Last Name, SSN, Phone N..., Address, County, Unit, and Deceased. The table contains several rows of contact information. The third row, with First Name 'orange' and Last Name 'juice', is selected, indicated by a blue radio button in the first column. Below the table are two buttons: 'Link Contact' and 'Create New Contact'.

3. If the Contact you want to link to the Case exists it will be displayed in the list (see image above). Select the radio button to the left of the Contact and then click the blue **Link Contact** button in the bottom left corner. The Contact is now linked to the Case and can be seen by clicking the *Case Associates* link in the Related List Quick Links section of the Case page.

4. If the Contact you want to link to the Case does not exist, click the blue **Create New Contact** button in the bottom left corner (see image above). A Create new Contact page will display. At a minimum, complete the Last Name field and select a Type of contact from the Type picklist near the top of the page. Scroll to the bottom of the page when you have completed the form and click the blue **Save** button.

The screenshot shows a web form titled "Create new Contact". The form is organized into two main columns. The left column contains fields for Salutation (dropdown, --None--), First Name (text, Alleged), Last Name (text, Perpetrator Contact), Facility (text, Search Providers...), Relationship to the Alleged Victim (dropdown, --None--), Case (text, 00001317), County (dropdown, --None--), Deceased (checkbox, unchecked), Email (text), Medicare Number (text), and Outside Indiana (checkbox, unchecked). The right column contains fields for Contact Type (dropdown, Alleged Perpetrator), Account Name (text, Search Accounts...), Mailing Street (text), Mailing City (text), Mailing State/Province (text), Mailing Zip/Postal Code (text), Mailing Country (text), SSN (text, with an info icon), and Medicaid Number (text). A red box highlights the "Perpetrator Contact" text in the Last Name field. Another red box highlights the "Alleged Perpetrator" dropdown selection in the Contact Type field. At the bottom of the form, there is a section titled "Demographics Information" which is currently collapsed.

5. The new Contact is saved and automatically linked to the Case and can be seen by clicking the *Case Associates* link in the Related List Quick Links section the Case page.

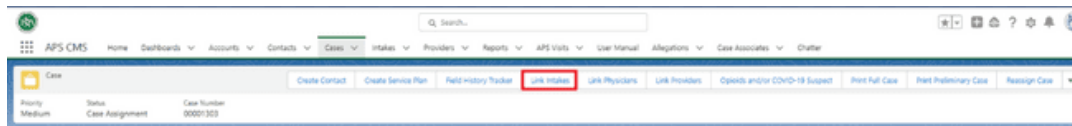
Edit Contacts or Case Associates

See instructions for editing Contacts in the [Edit Existing Contacts](#) section (click ctrl + the underlined text to be taken directly to the Edit Existing Contacts section)

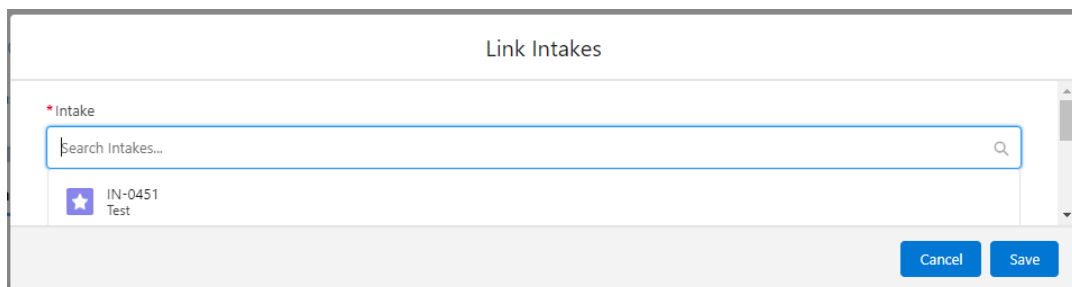
Link Intakes to Case

Users can link an Intake to a Case.

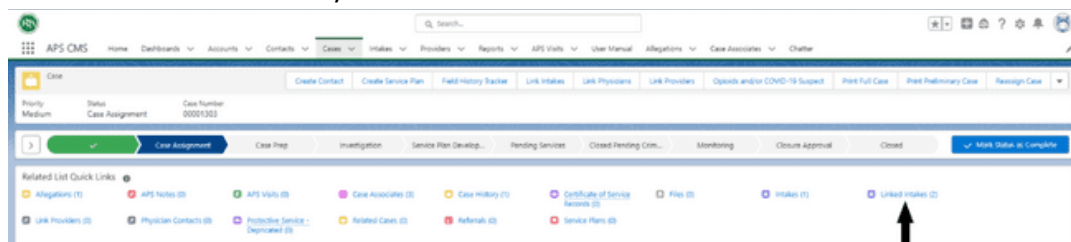
1. From the Case page for the Case to which you wish to link an Intake, click the **Link Intakes** quick action button.



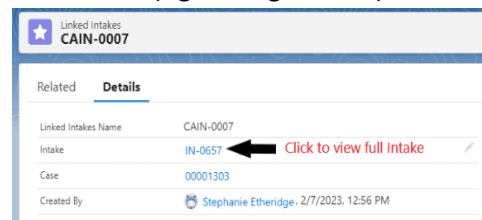
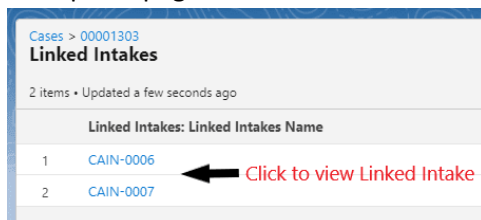
2. In the *Search Intakes...* box enter the Intakes number (if known) or the name associated with the Intake. Select the desired Intake.
3. Click **Save**.



4. To view Intakes linked to a Case click *Linked Intakes()* in the Related List Quick Links. The number in parentheses shows how many Intakes are linked to the Case.



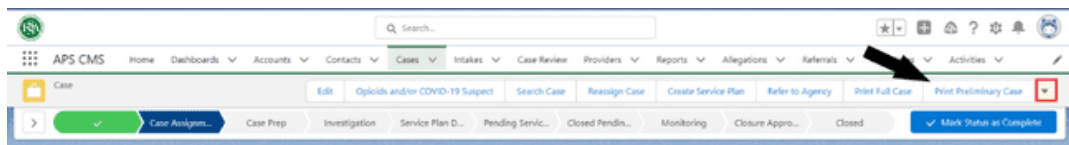
5. From the list that displays click the link of the Intake you wish to view (left image below), and it will open a page with a link to click to view the full Intake (right image below).



Print Preliminary Case

Users have the option to print a Preliminary Case report.

1. Open the Case for which you wish to print a Preliminary Case report, by following Step 3 in the *Create and View a Case* section.
2. Locate the **Print Preliminary Case** quick action button near the top of the screen and click it. If it is not displayed, click the drop-down arrow at the far right of the quick action buttons and select it from the list.



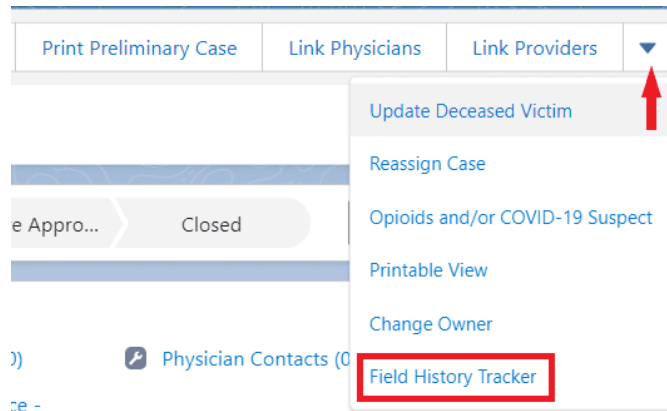
3. The report is generated as a pdf file and will display on your screen. Use the scroll bar to the right of the report to view the entire report.
4. Users can download and save the report by selecting the downward facing arrow over a white line (see image below).
5. Users can print the report, provided their computer is paired with a printer, by selecting the printer icon (see image below).

A screenshot of a PDF report titled 'PRELIMINARY REPORT OF ALLEGED ADULT ENDANGERMENT'. The report is from the State of Indiana, State Form 42295 (R3 / 8-97) BAIS 0002. It includes a case number 'APS CASE #: 00001115' and a priority 'PRIORITY: 3 - Standard'. The report is divided into two main sections: 'COMPLAINT INFORMATION' and 'VICTIM INFORMATION'. The 'COMPLAINT INFORMATION' section includes fields for County Name (Lawrence), Date (September 23, 2022), Time (01:44:03 PM), Name of complainant and address (title/agency), Relationship to adult, and Telephone Number. The 'VICTIM INFORMATION' section includes fields for Name of victim (last, first, middle initial), Age, Date of birth, Home address (facility name, street, city, state, ZIP code), Telephone number, Sex, and Current location (if other than home/facility). Two red arrows point to the download (downward arrow) and print (printer icon) icons in the top right corner of the PDF viewer.

6. Click the white 'X' to close the report.
7. To print a full case report, locate the **Full Case Report** quick action button and follow the steps above.

Field History Tracker

Users can view the history of changes made to fields on the Intake record and can see when a Case Associate was created for the Case by navigating to and clicking the Field History Tracker link.



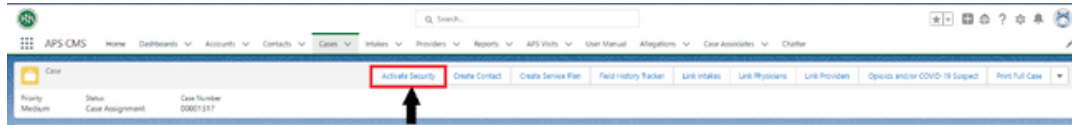
Users will see:

1. Name of the field that was changed.
2. Old value of the field.
3. New value of the field.
4. Date the field was changed.
5. Name of the user who made the change.

Record	Field	Old Value	New Value	Modified Date	Modified By
IN-0451	Gender__c	Male		2023-01-30T20:40:41.000+0000	Stephanie Etheridge
IN-0451	api_perpetratorFirst_Name__c	Ted	Wile E.	2023-01-30T20:40:41.000+0000	Stephanie Etheridge
IN-0451	api_perpetratorFirst_Name__c	Test	Ted	2023-01-26T16:30:42.000+0000	Stephanie Etheridge
IN-0451	api_Status__c	Screening	Closed	2023-01-05T19:00:20.000+0000	Stephanie Etheridge
IN-0451	api_Status__c	In Progress	Screening	2023-01-05T18:59:22.000+0000	Stephanie Etheridge
IN-0451	api_Status__c	New	In Progress	2023-01-05T18:59:15.000+0000	Stephanie Etheridge
IN-0451	Gender__c		Male	2023-01-05T18:57:54.000+0000	Stephanie Etheridge
IN-0451	api_perpetratorFirst_Name__c		Test	2023-01-05T18:57:54.000+0000	Stephanie Etheridge
IN-0451	api_AllegedFirst_Name__c		Test	2023-01-05T18:55:11.000+0000	Stephanie Etheridge
IN-0451	created			2023-01-05T18:53:32.000+0000	Stephanie Etheridge

Activate Security

1. Locate and click the **Activate Security** button on the quick action bar.



2. Click the blue [Search Address](#) link on the Activate Security window that opens and begin typing the address in the Address Search window.

A screenshot of the 'Activate Security' window. The window has a title bar 'Activate Security'. Inside, there are several form fields: 'Case Number' with the value '00001317', 'Summary of Visit' with a text area, 'Visit Location' with a search bar containing a magnifying glass icon and a blue 'Search Address' link, 'Visit Location (Country/Territory)' with a dropdown menu showing 'United States', 'Visit Location (Street)' with a text area, 'Visit Location (City)' with a text field, 'Visit Location (State/Province)' with a dropdown menu showing '--None--', and 'Visit Location (ZIP/Postal Code)' with a text field. At the bottom right, there are 'Cancel' and 'Save' buttons.

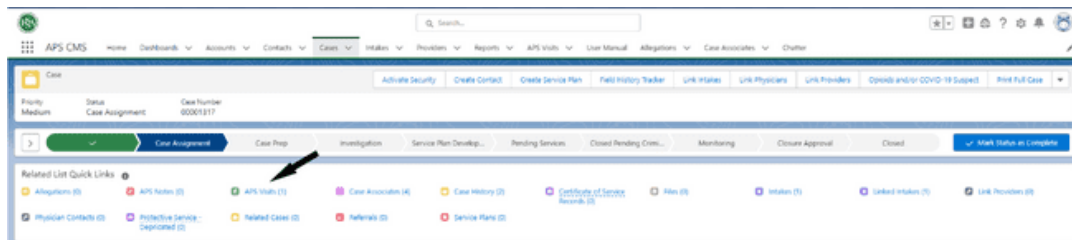
3. Select the correct address from the list that displays, and the address will automatically populate on the Activate Security page.

The screenshot shows the 'Activate Security' form with a modal window titled 'Address Search' open. The modal contains a search bar with the text '1600 Pennsylvania Avenue, Washington, DC'. Below the search bar, there are two address suggestions, each preceded by a location pin icon: '1600 Pennsylvania Avenue Northwest Washington D.C., DC, USA' and '1600 Pennsylvania Avenue Southeast, Washington D.C., DC, USA'. At the bottom of the modal, it says 'powered by Google'. The background form is partially visible, showing fields for Case Number (00001317), Visit Location (Country: United States, Street: 1600 Pennsylvania Avenue, City: Washington, ZIP/Postal Code: 20500), and a Summary of Visit field. There are 'Cancel' and 'Save' buttons at the bottom right of the form.

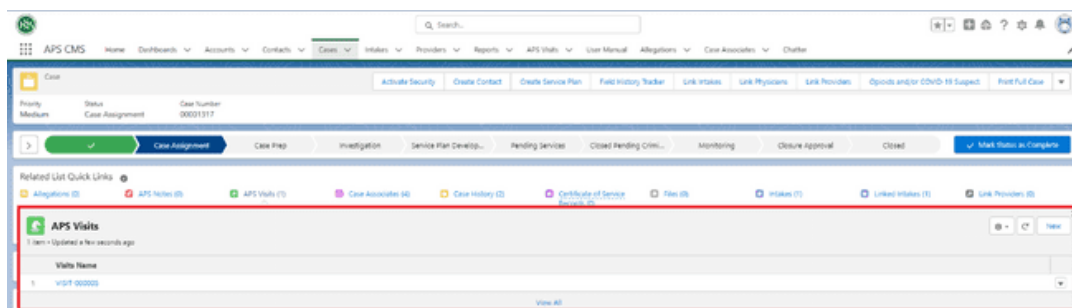
4. Click the **Save** button and an APS Visit will be created.

The screenshot shows the 'Activate Security' form with the address search modal closed. The 'Visit Location (Street)' field is now populated with '1600 Pennsylvania Avenue Northwest'. The 'Visit Location (City)' field is populated with 'Washington', and the 'Visit Location (State/Province)' dropdown menu is set to 'District of Columbia'. The 'Visit Location (ZIP/Postal Code)' field is populated with '20500'. The 'Case Number' field is '00001317'. The 'Summary of Visit' field is empty. There are 'Cancel' and 'Save' buttons at the bottom right of the form.

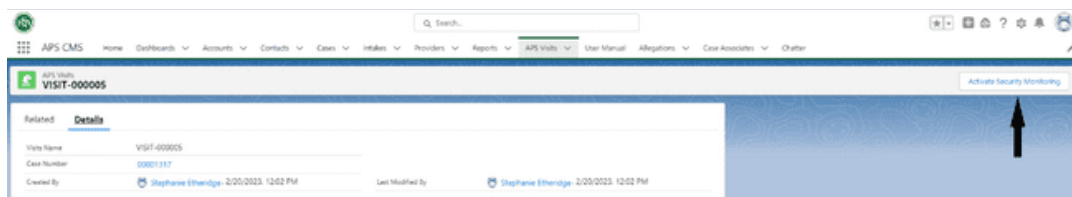
5. To view all visits associated with this case click the blue APS Visits link in the Related List Quick Links section.



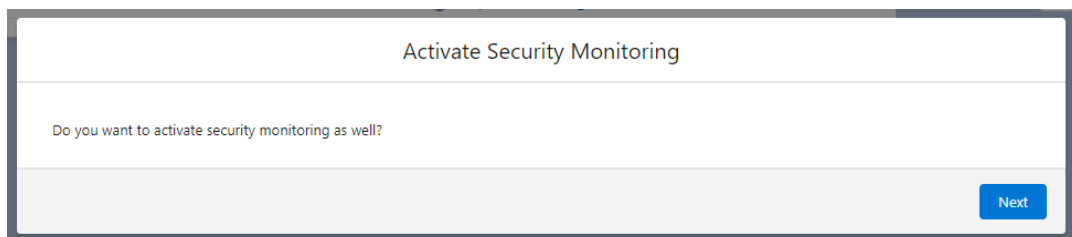
6. A list of all visits will display (outlined in red below). Click on the blue Visits Name of the visit you wish to view.



7. The Details page will display. Click the **Activate Security Monitoring** button if you wish to do so.



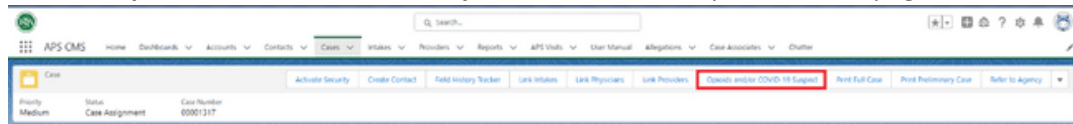
8. The Activate Security Monitoring window will display asking if you want to activate security monitoring as well. If you do, click the blue **Next** button. Otherwise, click the 'X' above the right-hand corner (not shown in image below) of the Activate Security Monitoring window.



Opioid and Covid 19 Suspect

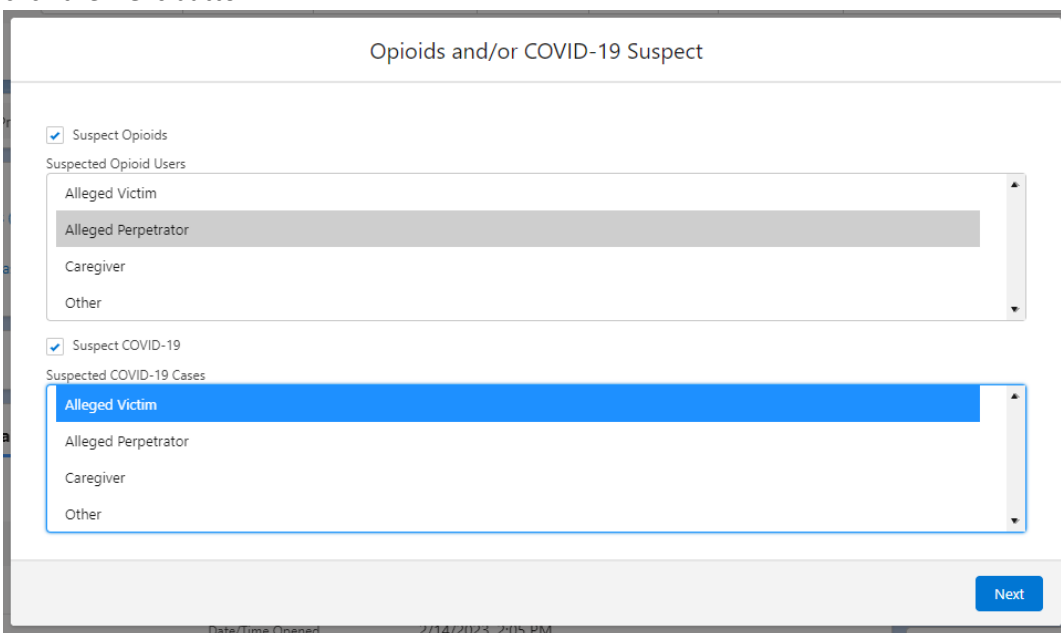
To document suspected Opioid and/or Covid 19 cases associated with a Case:

1. Click the **Opioids and /or Covid 19 Suspect** button at the top of the Case page.



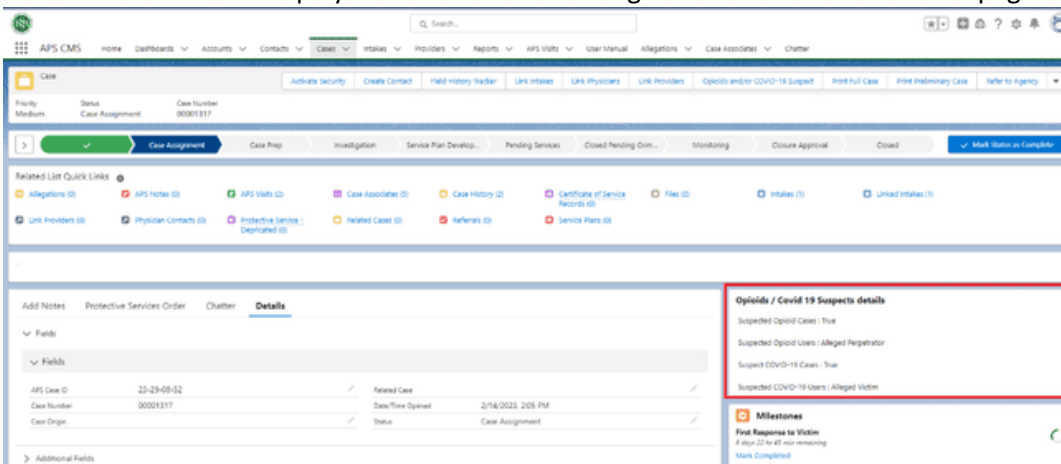
The screenshot shows the APS CMS Case page. The top navigation bar includes buttons for 'Activate Security', 'Create Contact', 'Field History Tracker', 'Link Intakes', 'Link Physicians', 'Link Providers', and 'Opioids and/or COVID-19 Suspect'. The 'Opioids and/or COVID-19 Suspect' button is highlighted with a red box. Below the navigation bar, the case details are displayed: Priority: Medium, Status: Case Assignment, Case Number: 00001317.

2. Check one, or both, options on the window that opens. A picklist will open for each option you checked (both options selected in image below). Select the appropriate values and click the **Next** button.



The screenshot shows the 'Opioids and/or COVID-19 Suspect' window. It has two sections: 'Suspect Opioids' and 'Suspect COVID-19'. Both sections have a checkbox that is checked. Below each checkbox is a picklist. In the 'Suspect Opioids' picklist, 'Alleged Perpetrator' is selected. In the 'Suspect COVID-19' picklist, 'Alleged Victim' is selected. A 'Next' button is at the bottom right. The date/time opened is 2/14/2023, 2:05 PM.

3. The saved details will display in a related list in the right-hand column of the Case page.



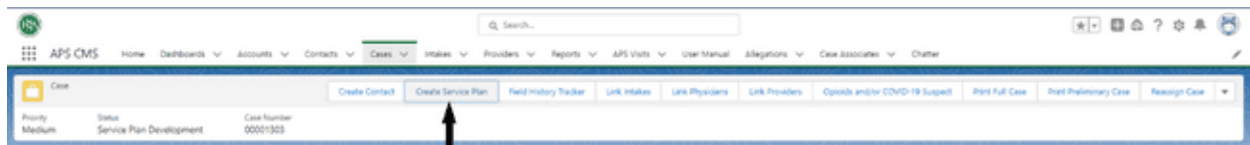
The screenshot shows the APS CMS Case page. The 'Opioids and/or COVID-19 Suspect' button is highlighted in the top navigation bar. Below the navigation bar, the case details are displayed: Priority: Medium, Status: Case Assignment, Case Number: 00001317. The 'Case Assignment' tab is selected. The 'Related List Quick Links' section shows various links. The 'Details' tab is selected. The 'Opioids / Covid 19 Suspects details' related list is displayed in the right-hand column, showing the following information: Suspected Opioid Cases: True, Suspected Opioid Users: Alleged Perpetrator, Suspected COVID-19 Cases: True, Suspected COVID-19 Users: Alleged Victim. A 'Mark Status as Complete' button is at the bottom right.

Service Plans

Creating Service Plans

To add a new Service Plan, complete the following steps:

1. Click the **Create Service Plan** quick action button on the *Case* page. The *New Service Plan* form displays with the case number prepopulated.

A screenshot of the 'New Service Plan' form. The form is divided into several sections: 'Information', 'Services', and 'Safety/Risk'. In the 'Information' section, the 'Case' field is prepopulated with '00001303' and is highlighted with a red box. Other fields include 'Service Plan Name', 'Date Prepared' (2/8/2023), 'Name of Investigator', 'Name of Endangered Adult', 'Service Plan Goal', 'Date Delivered to Victim and/or attorney' (2/8/2023), and 'Duration Frequency of Service Plan'. The 'Services' section includes checkboxes for 'Services Initiated' and 'Service Refused', a 'Service Start Date' field, and a 'Service Type' dropdown menu. The 'Safety/Risk' section has a 'Safety/Risk Problem' field. At the bottom, there are 'Cancel', 'Save & New', and 'Save' buttons.

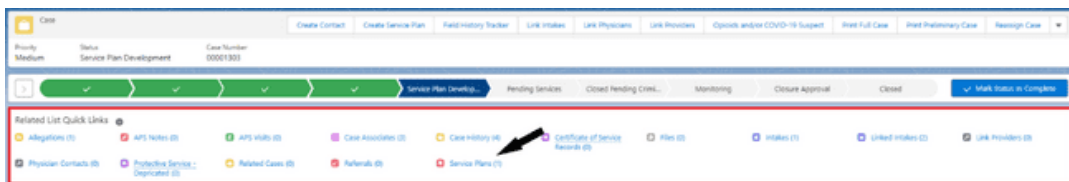
2. Complete the information in the *New Service Plan* form. At least one of the following sections must be completed before the system will allow you to save a Service Plan:
 - **Safety/Risk:** complete the Safety/Risk Problem, Safety/Risk Objective, and Safety/Risk Services fields.
 - **Living Environment:** complete the Living Environment Problem, Living Environment Objective, and Living Environment Services fields.
 - **Physical/Medical Impairments:** complete the Physical/Medical Impairments Problem, Physical/Medical Impairments Objective, and Physical/Medical Impairments Services fields.
 - **Financial/Social:** complete the Financial/Social Problem, Financial/Social Objective, and Financial/Social Services fields.
 - **Capacity:** complete the Capacity Problem, Capacity Objective, and Capacity Services fields.

9. Click **Save** to save the new Service Plan record.
 - You will be taken to the Details page of the Service Plan.
 - Click the blue Case number to navigate back to the associated Case.
 - Click the '>' symbol next to Additional Fields to see more information about the Service Plan.

Viewing or Editing Service Plans

To view or edit a Service Plan, complete the following steps:

1. In the Related List Quick Links panel for the Case, click the Service Plans link, the number in () indicates the number of Service Plans associated with this Case.



2. In the list that pops up, click the name of the Service Plan record you want to view or edit. The *Service Plan* details page displays.

Cases > 00001303	
Service Plans	
2 items • Updated a few seconds ago	
Service Plan Name	
1	SP-0094 Click to view Service Plan
2	SP-0095

Image: Service Plan Details Page

3. Click on “> Additional Fields” (1 in image above) to expand the page for additional fields to view/edit.
4. You can edit the record in two ways:
 - a. Click the **Pencil** icon to edit each field (2 in image above)
 - b. Click the **Edit** button in the sub-banner (3 in image above) to edit the record.
5. Regardless of which method you choose to edit the record, be sure to click the Save button at the bottom of the page before exiting the record.

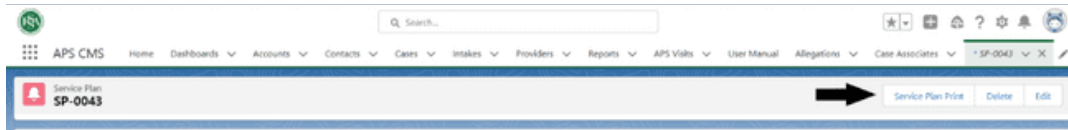
Print Service Plan

Users have the option to print a Service Plan report.

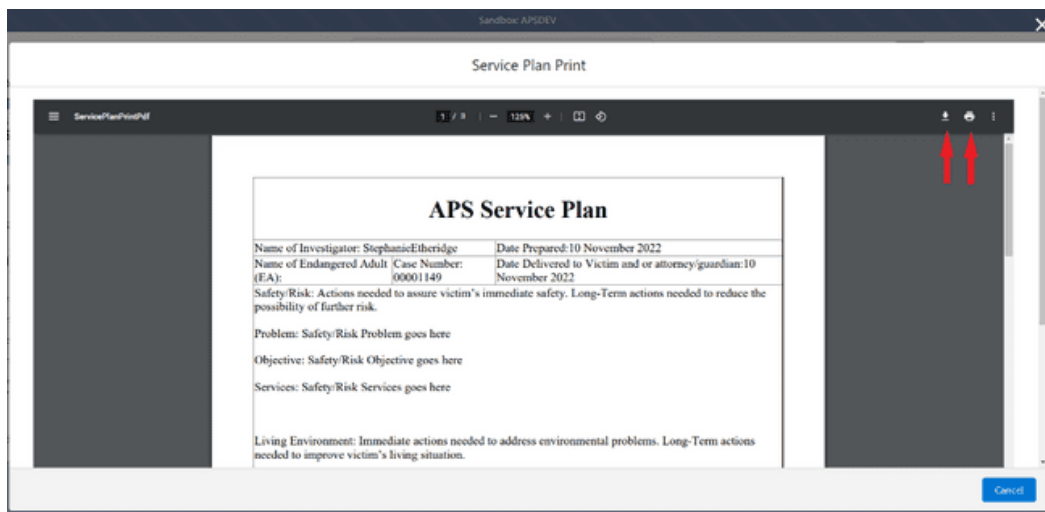
1. Open the Case for which you wish to print a Service Plan report.
2. Locate and click on the Service Plans link in the Related List Quick Action Links section.

3. From the list of Service Plans, click on the blue Service Plan Name of the plan you want to print. This will open the Service Plan.

4. Locate the **Print Service Plan** quick action button near the top of the screen and click it.



5. The report is generated as a pdf file and will display on your screen. Use the scroll bar to the right of the report to view the entire report.
6. Users can download and save the report by selecting the downward facing arrow over a white line (see image below).
7. Users can print the report, provided their computer is paired with a printer, by selecting the printer icon (see image below).

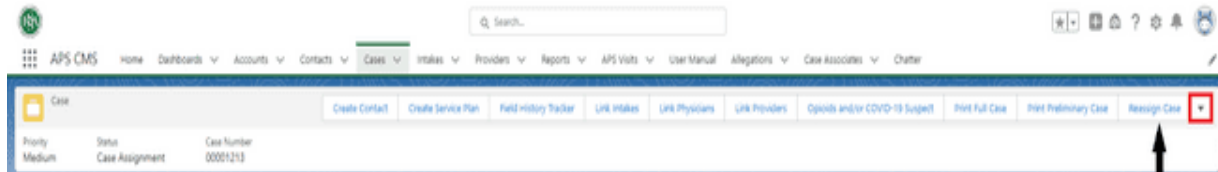


8. Click the white 'X' to close the report.

Reassigning Cases

A case can be reassigned to a different county by completing the following steps:

1. From the Cases tab, open the Case you wish to reassign.
2. Locate and click the **Reassign Case** quick action button near the top of the screen. If it is not displayed, click the drop-down arrow at the far right of the quick action buttons and select it from the list.



3. In the Reassign Case window, double-check the Case Number is the one you want to reassign. Then select the Victim County from the drop-down menu (the current Victim County auto-populates). After selecting the county to which the case will be reassigned, click the **Save** button.

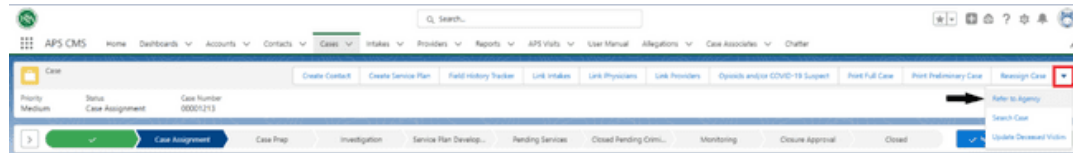
A screenshot of the 'Reassign Case' window. It features two main input fields: 'Case Number' with the value '00001213' and 'Victim County' with the value 'Lawrence'. Both fields are highlighted with red boxes. At the bottom right, there are two buttons: 'Cancel' and 'Save'.

4. After saving, the Victim County field on the Case Detail page will display the newly assigned county.

A screenshot of the 'Case Detail' page. The 'Details' tab is selected. Under the 'Case Assignment Information' section, the 'Victim County' field is highlighted with a red box and displays the value 'Monroe'. Other fields include 'Assigned To' (Stephanie Etheridge), 'Investigator Assignment Date' (1/5/2023), 'Supervised By', 'Victim Unit' (Unit 15), 'Victim Name' (Test Alleged Victim), 'Victim DOB' (1/1/1963), 'Triage Date' (2/14/2023, 11:17 AM), and 'Triage Level' (Level 3 - 20 calendar days).

Referring Cases to an Agency

1. Open the Case you wish to refer and then locate and click the **Refer to Agency** link.



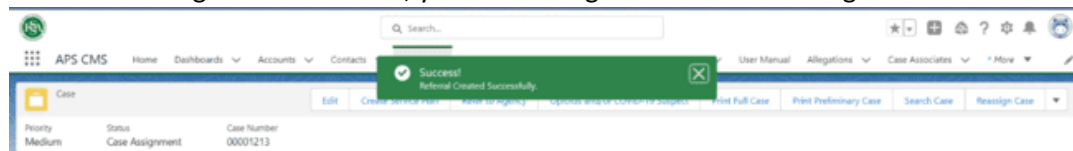
2. From the Create Referral page select a Service Plan from the drop-down menu, complete the Referral Date and Provider Start Date, and select at least one Agency. Provider is optional. Click the **Save** button.

If you click in the Provider field a Search Facility box will open and you will be able to search for and select an existing Provider.

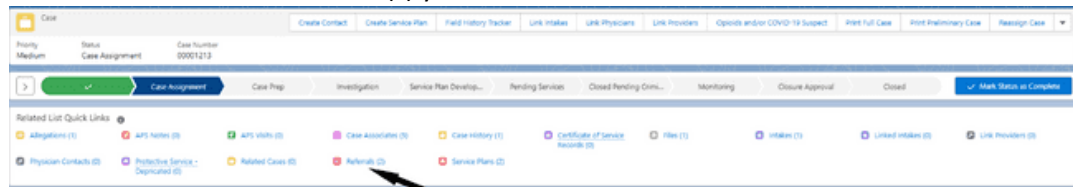
NOTE: When selecting Agency, the Description field will appear only if Other is selected, and it will be required.

A screenshot of the 'Create Referral' form in the APS CMS. The form includes fields for Service Plan (SP-0005_Alleged Victim, Test), Referral Date (Feb 14, 2023), Provider (search facility), Agency (BODS, DMHSA, AAA, Other), and Provider Start Date (Feb 14, 2023). There is also a Description field with the text 'Text'. A 'Save' button is located at the bottom right of the form.

3. After clicking the **Save** button, you will see a green Success! message box.



4. To view referrals, click the Referrals link in the Related List Quick Links section on the Case associated with the Referral(s) you want to view.



5. Locate the Referral Number in the list that displays and click the blue link to open and view it.

	Referral Number	Referral Date	Referral Type	Provider	Victim Name	Provider County	Service Plan
1	R-000098	1/5/2023			Test Alleged Victim		
2	R-000099	2/14/2023			Test Alleged Victim		SP-0005

6. Click on Additional Fields to see more information about the referral. The Information section will collapse and

Referral R-000098

Related Details

Fields

Information

Referral Number	R-000098	Active	<input checked="" type="checkbox"/>
Referral Type		Case	00001213
Referral Date	2/14/2023	Victim Name	Test Alleged Victim
Agency	Other	Service Plan	SP-0005
Additional Agency	Test	Service Start Date	

> Additional Fields

Referral R-000098

Related Details

Fields

Additional Fields

Provider Details

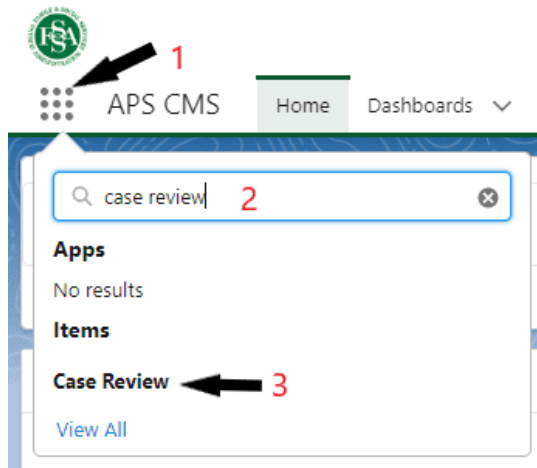
Provider		Address	
Provider County		City	
Provider Start Date	2/14/2023	State	
		ZipCode	

System Information

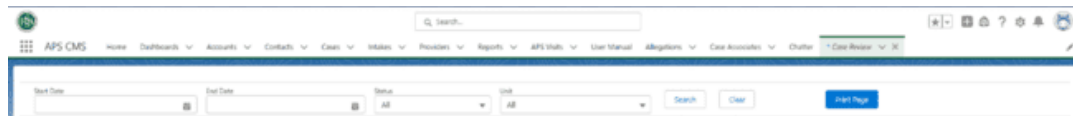
Created By [Stephanie Etheridge](#) 2/14/2023, 10:35 AM Last Modified By [Stephanie Etheridge](#) 2/14/2023, 10:35 AM

Case Review for Quality Analysis

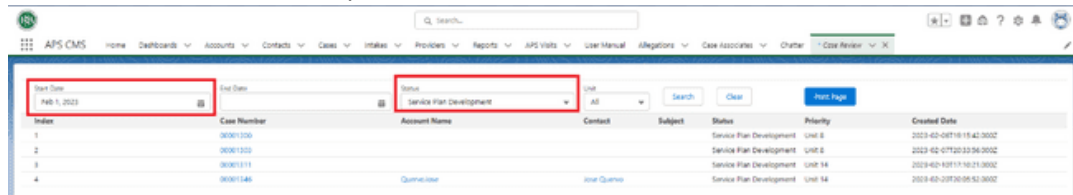
1. Click the Waffle Menu
2. Type 'case review' (without quotation marks) in the search box
3. Click on Case Review in the list that displays



4. Use the fields at the top of the page to select the criteria for the Cases you want to review. Use any combination of the fields. Then click the **Search** button to display all the Cases that meet your criteria.



5. Below is an example of Cases returned based on a Start Date of February 1, 2023 and a Status of *Service Plan Development*



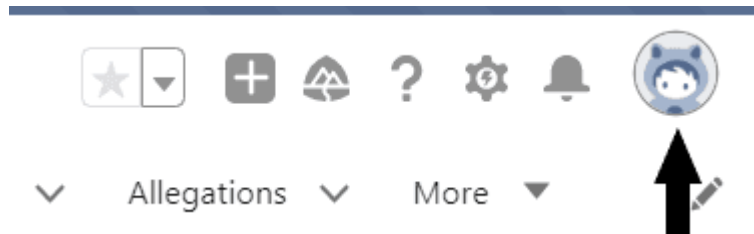
6. Click the **Print Page** button to either (1)download and save the report as a pdf or (2)send the report to your printer.

Case Number	Created Date	Subject	Status	Unit
00001186	Thu Dec 15 13:51:10 GMT 2022		Closed	Unit 110
00001187	Thu Dec 15 13:54:07 GMT 2022		Case Prep	Unit 14
00001188	Thu Dec 15 14:43:53 GMT 2022		Closure Approval	Unit 4
00001189	Thu Dec 15 14:45:32 GMT 2022		Case Prep	Unit 4
00001190	Thu Dec 15 15:13:07 GMT 2022		Case Assignment	
00001191	Thu Dec 15 15:38:20 GMT 2022		Case Assignment	
00001192	Thu Dec 15 15:52:29 GMT 2022		Case Assignment	Unit 14
00001193	Thu Dec 15 20:10:10 GMT 2022		Closure Approval	Unit 110
00001194	Fri Dec 16 18:02:40 GMT 2022		Case Assignment	Unit 5
00001195	Fri Dec 16 18:17:39 GMT 2022		Case Assignment	Unit 4
00001196	Fri Dec 16 18:20:38 GMT 2022		Case Assignment	Unit 7
00001197	Tue Dec 27 14:08:29 GMT 2022		Case Assignment	Unit 4
00001198	Wed Dec 28 14:36:27 GMT 2022		Case Assignment	Unit 8
00001199	Wed Dec 28 17:39:14 GMT 2022		Case Assignment	Unit 8
00001200	Thu Dec 29 07:11:39 GMT 2022		Closure Approval	Unit 1
00001201	Thu Dec 29 08:27:51 GMT 2022		Case Assignment	Unit 14
00001202	Thu Dec 29 15:59:52 GMT 2022		Closed	Unit 14
00001203	Fri Dec 30 18:00:40 GMT 2022		Case Assignment	Unit 14
00001204	Tue Jan 03 10:09:00 GMT 2023		Closed	Unit 1
00001205	Tue Jan 03 18:00 GMT 2023		Closure Approval	Unit 1
00001206	Tue Jan 03 17:43:54 GMT 2023		Case Assignment	Unit 3
00001207	Tue Jan 03 17:51:45 GMT 2023		Case Assignment	Unit 14
00001208	Tue Jan 03 17:57:07 GMT 2023		Case Assignment	Unit 14
00001209	Wed Jan 04 16:40:39 GMT 2023		Closure Approval	Unit 3
00001210	Wed Jan 04 18:23:04 GMT 2023		Case Assignment	Unit 8
00001211	Thu Jan 05 01:45:55 GMT 2023		Pending Services	Unit 14
00001212	Thu Jan 05 14:49:39 GMT 2023		Case Assignment	Unit 3
00001213	Thu Jan 05 19:00:03 GMT 2023		Case Assignment	Unit 15
00001214	Fri Jan 06 03:00:20 GMT 2023		Case Assignment	Unit 11
00001215	Fri Jan 06 03:04:06 GMT 2023		Closure Approval	Unit 4
00001216	Fri Jan 06 10:28:36 GMT 2023	attest	Case Assignment	Unit 1
00001217	Fri Jan 06 11:02:27 GMT 2023		Closure Approval	Unit 1
00001218	Fri Jan 06 15:53:15 GMT 2023		Case Assignment	Unit 7
00001219	Fri Jan 06 16:32:16 GMT 2023		Closed Pending Criminal Action	Unit 8

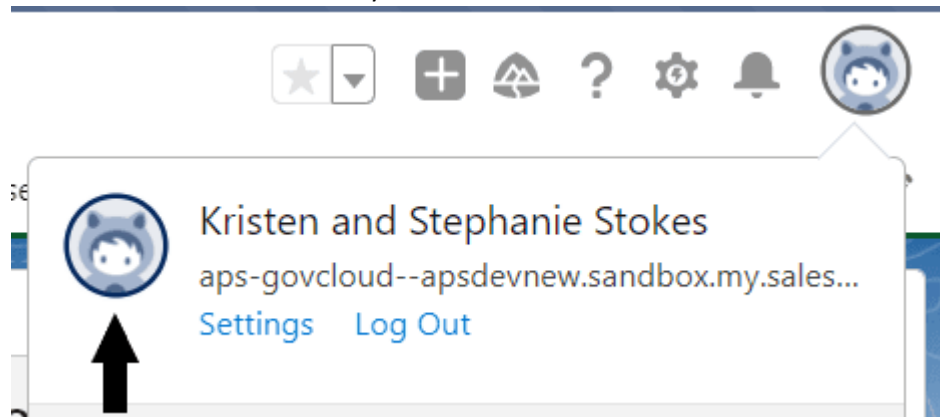
Delegating Authority

If a user is going to be out of the office for a period of time, they may wish to delegate their authority to another user in the system.

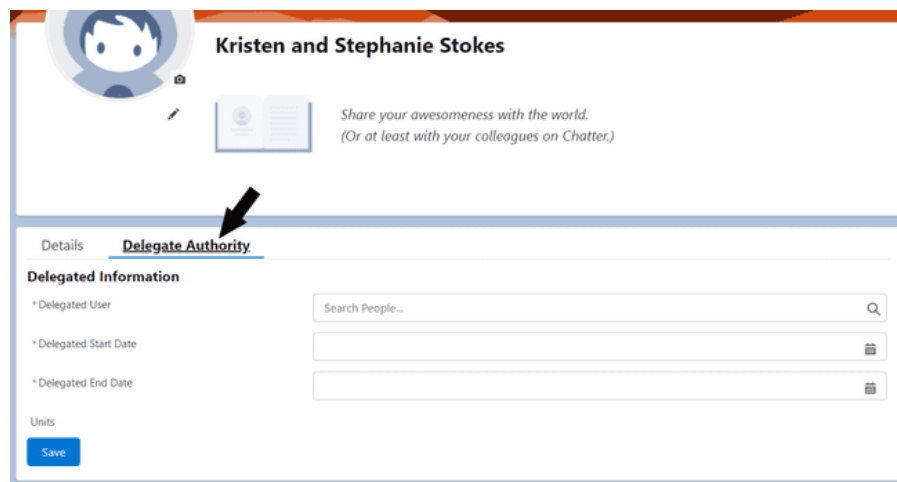
1. Navigate to your User Detail page by clicking the icon in the upper right corner of the page.



2. Click on the icon to the left of your name.



3. Your User Details page will display. Click Delegate Authority to display the page below.



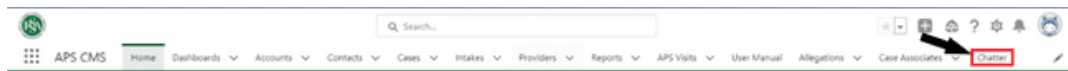
4. In the Search People... box (pictured above), type in the name of the user to whom you want to delegate authority. After selecting the user, enter the Start Date and the End Date and click the **Save** button.

Using Chatter

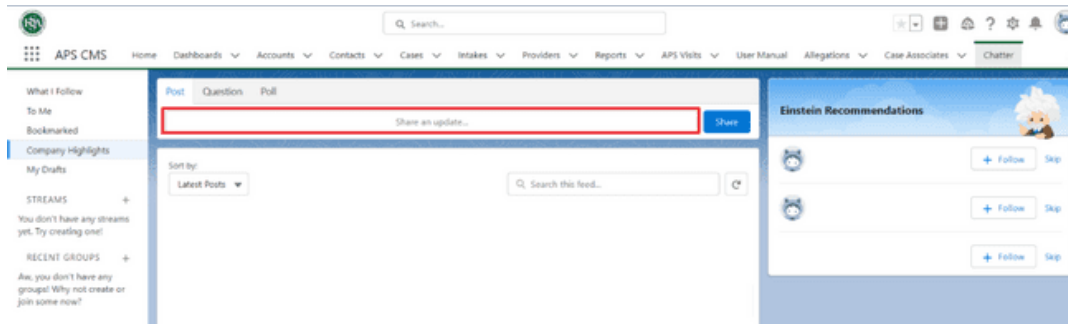
Chatter is a way to communicate with other users directly in the APS CMS program.

Creating a Post in Chatter

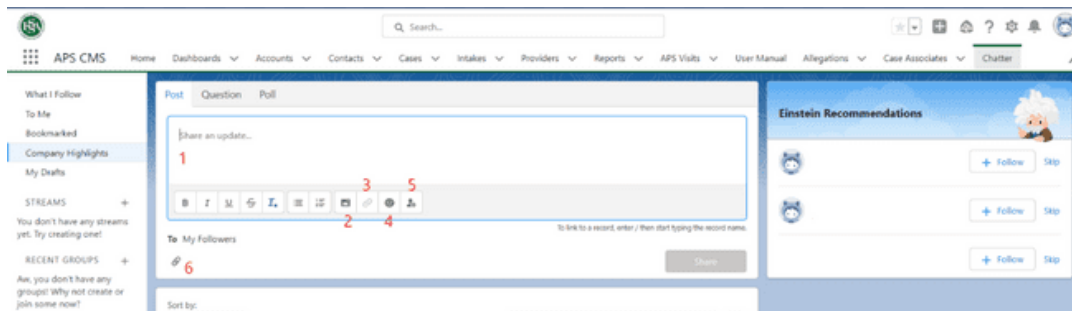
1. Access Chatter from the Chatter tab on the Navigation Bar. If the Chatter tab is not on the Navigation Bar, the user can add it by following the steps listed in the **Navigation Bar** section at the beginning of this user manual.



2. To compose a post, click inside the *Share and update...* box.

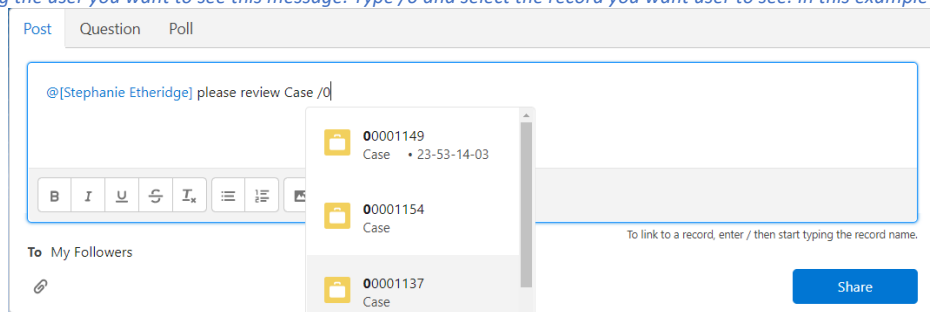


3. Compose your message in the box labeled '1' in the image below.
 - a. To tag an individual in your post you can type the '@' symbol and then begin typing the user's name. If the user exists in the system, you will be able to select their name from the list that pops up and it will appear as a blue link.
 - b. Another way to tag an individual, or a group, is to click the button labeled '5'. The '@' symbol will automatically appear, and you can begin typing the individual's name or the name of the group (Instructions for creating groups is found in the **Creating Chatter Groups** section below).
 - c. To attach an image to your post, click the button labeled '2'. Instructions for attaching an image are found in the **Attaching an Image to a Chatter Post** section below.
 - d. To include an emoji in your post, click on the button labeled '4' and select from the collection that pops up.
 - e. To attach a file to your post, click on the paper clip icon labeled '6'. You will see a *Select File* pop-up window like the *Select Image* window pictured below. The instructions are the same for both pop-up windows so only the *Select Image* instructions are listed.

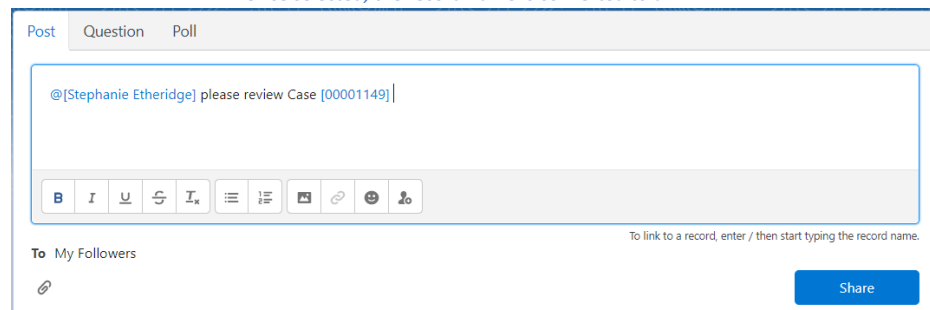


- f. To link to a record in your post, type '/' (without apostrophes) and then begin typing the record name. A list displays and you can select the record you want to link to. See example immediately following.

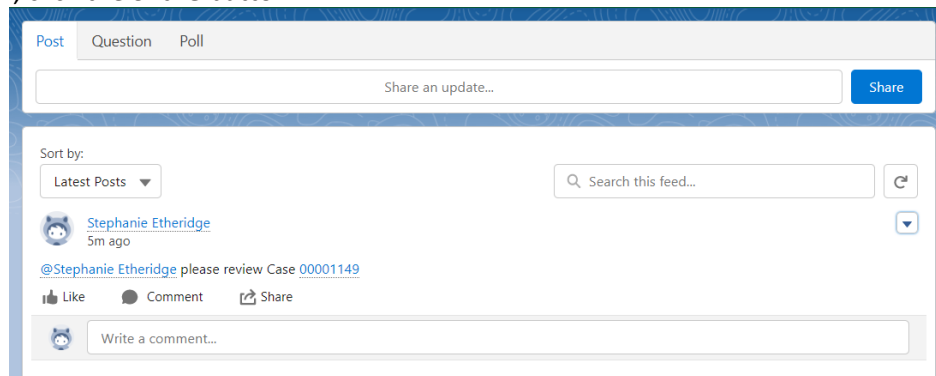
Example: Tag the user you want to see this message. Type /0 and select the record you want user to see. In this example it is 00001149.



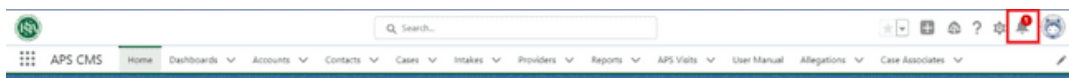
Once selected, the record name is converted to a link.



- When you have finished composing your post and attaching any files or images you would like to attach, click the **Share** button.



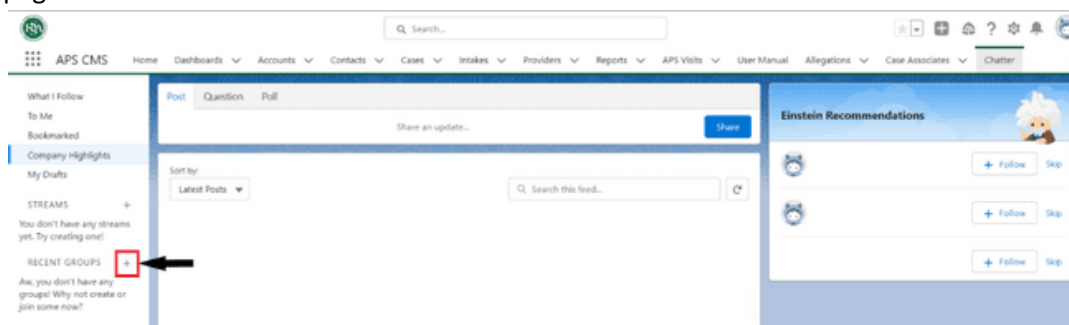
- Your post has been made and the user or group of users who were tagged will receive notification of the post. Notifications are in the form of a red number on the bell icon at the top of the screen.
- Hover over, or click, the bell icon to see your notifications.



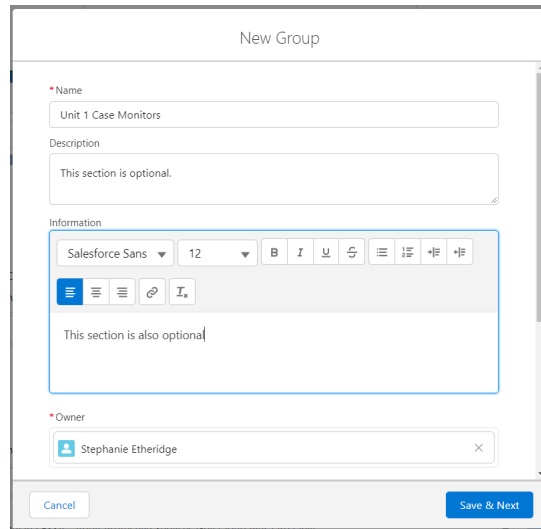
Creating Chatter Groups

If you find yourself tagging the same group of individuals in your Chatter posts, consider creating a Chatter Group and adding those individuals to the group, then you can tag them as described in Step 3b in the **Using Chatter** section above, or simply post directly to the group (instructions below).

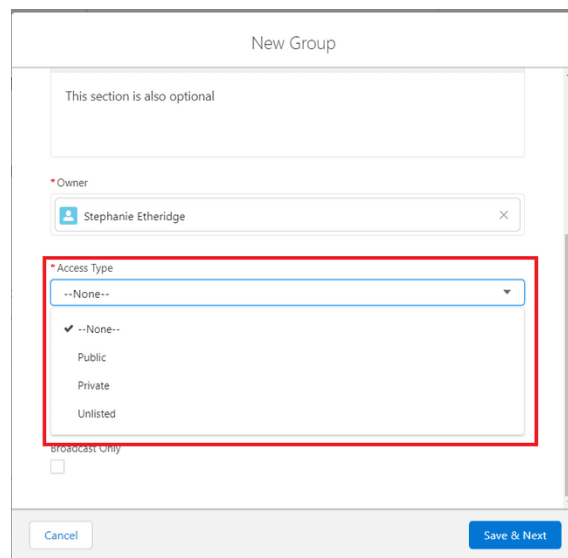
- To create a group, click the '+' icon next to RECENT GROUPS in the left-hand panel of the Chatter page.



2. Assign a name to your group. This is a required field. The Owner field is also required and defaults to the user creating the group.

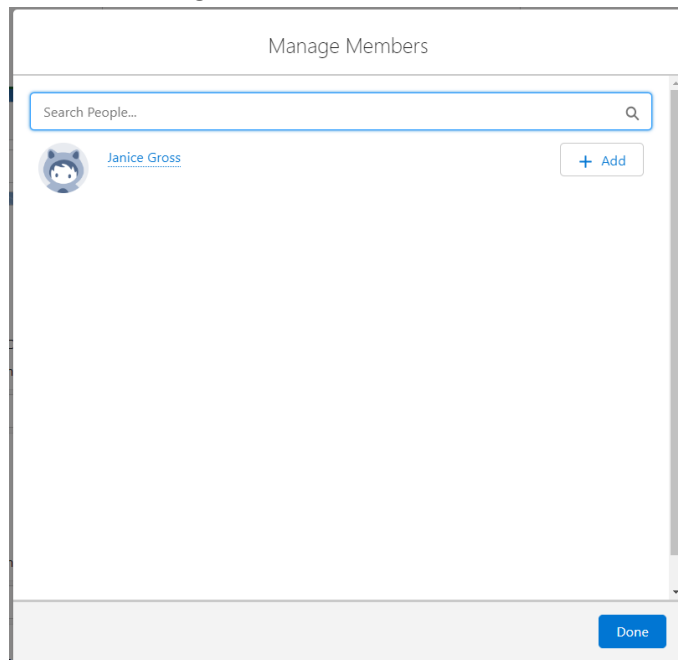


3. Scroll to see the rest of the form. Select the Access Type.
 - a. Public: anyone can find, join, and view the Chatter feed.
 - b. Private: anyone can find the group but must ask to join. Only members can view the Chatter feed.
 - c. Unlisted: members must be invited to join. The group is not searchable and only members can view the Chatter feed.



4. Click the **Save & Next** button, on the next page you have an option to upload an image for your group. Once you have either uploaded an image or decide not to click the **Next** button.

5. On the *Manage Members* page search for people to add to your group by typing their name in the Search People... box and then clicking the **Add** button next to their name.



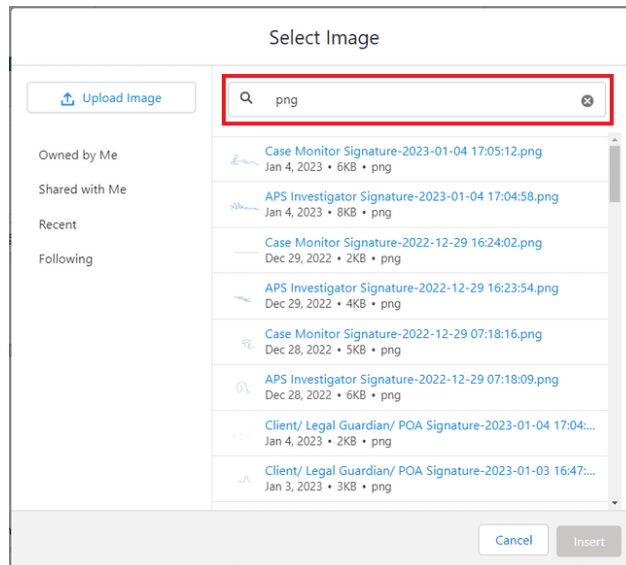
6. Click the **Done** button when you finish adding people to your group.

To post directly to a Group:

1. Click on the RECENT GROUPS link in the left-hand panel of the Chatter page.
2. In the list of Groups that display, click the link to the group you wish to post in and then follow the instructions in the ***Creating a Post in Chatter*** section above.

Attaching an Image to a Chatter Post

1. After clicking the Image button while creating a post (see Step 3c under the **Creating a Post in Chatter** section) you will see the *Select Image* page.

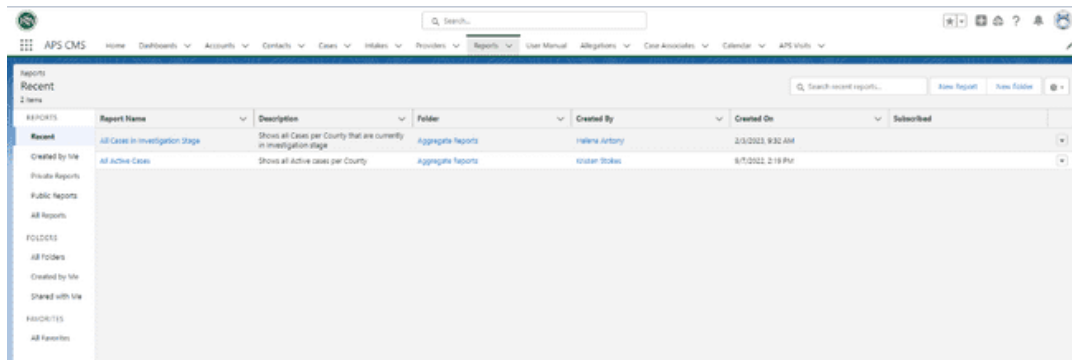


2. Use the search box (outlined in red above) to search for images already in the APS CMS system. In the example above the user searched for png images but could have searched by another keyword. If the desired image is found, click the link and then the **Insert** button.
3. Another way to insert an image is to click the **Upload Image** button. This will open a window that will allow you to search for images stored on your computer. Navigate to where you have stored the image you want to upload, select the image, and then click the **Open** button. The image will load into the post you are composing.
4. Alternatively, the user can try clicking the ***Owned by Me, Shared with Me, Recent, or Following*** links to search for images. If images are found under any of these links, they will display under the *Search Files...* box. Click the image of choice and then click the **Insert** button.

Reports

Accessing Reports

To access reports, select the **Reports** tab. The reports the user viewed most recently will display. Users can filter which reports to see by selecting any of the links in the left-hand column under REPORTS. They can filter which Folder to view by selecting any link under FOLDERS.



To search for a specific report the user can type the name of the report in the **Search** box near the **New Report** button.

Note: Depending on which link is highlighted in the left-hand column the user will be searching a limited number of reports. For example, in the image above, the Recent link is highlighted and the **Search** box tells the user the search will contain only recent reports.

Users can expand their search by selecting the All Reports link.

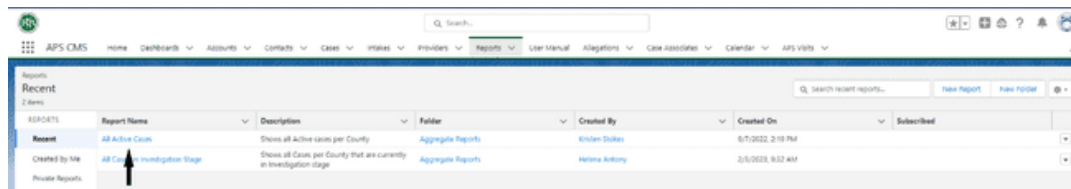
If a user selects a folder, then conducts a search, only reports in that folder will be searched.

Creating Reports

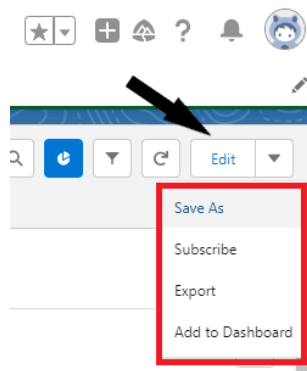
***Note-** Some Reports are pre-built, and users cannot alter them. However, users can save a copy of a report and alter it to meet their needs. Users can also create a new report.

To save a copy of a report:

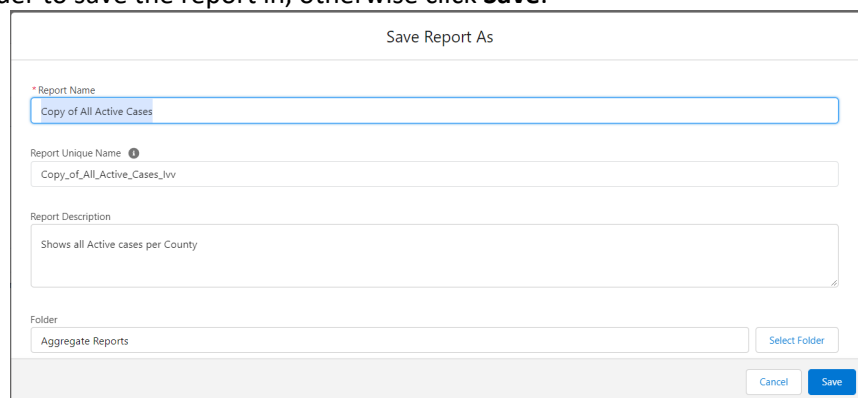
1. Once you have searched for and found the report you want to use as a template, open the report by clicking on the name of the report in the list displayed.



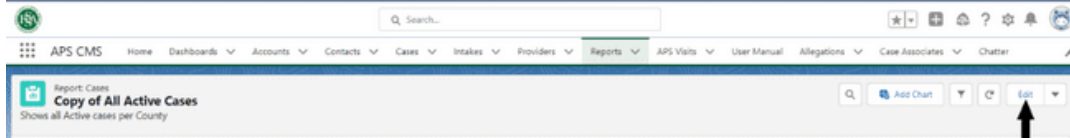
2. Once the report is open, select the drop-down arrow next to the **Edit** button and then select **Save As** from the list.



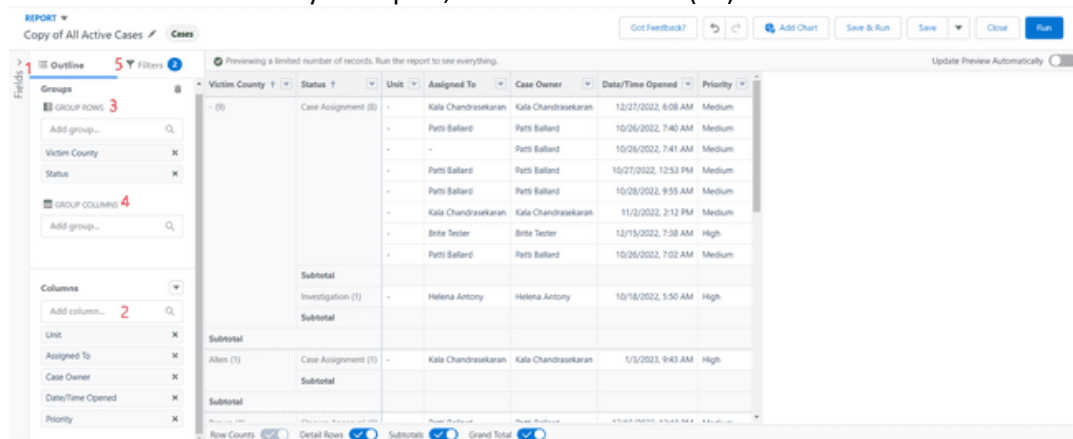
3. Give the report a new name or keep the default "Copy of (name of report)". If desired, select a different folder to save the report in, otherwise click **Save**.

A screenshot of the 'Save Report As' dialog box. It contains the following fields: 'Report Name' with the value 'Copy of All Active Cases', 'Report Unique Name' with the value 'Copy_of_All_Active_Cases_lv', 'Report Description' with the value 'Shows all Active cases per County', and 'Folder' with the value 'Aggregate Reports'. There is a 'Select Folder' button next to the folder field. At the bottom right, there are 'Cancel' and 'Save' buttons.

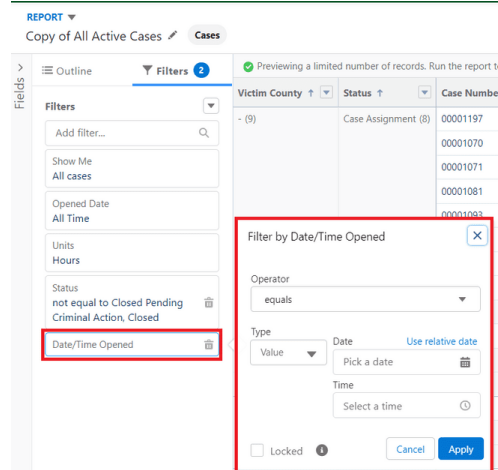
4. The user can now edit the report by clicking the **Edit** button at the top right corner of the report.



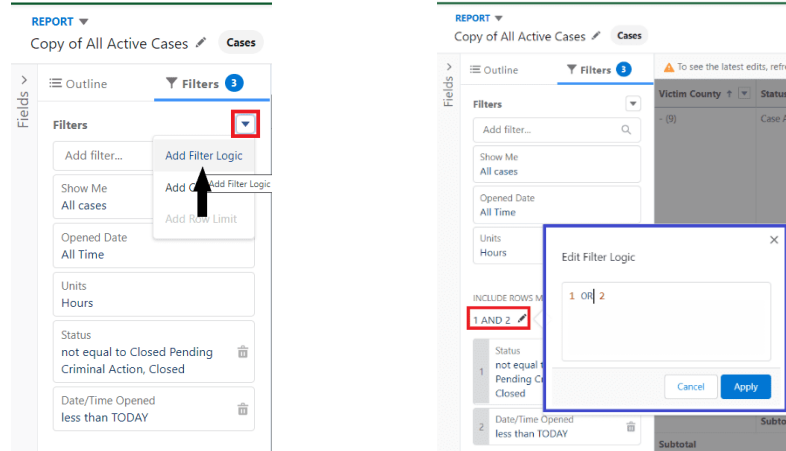
5. The user will see the report edit page like the one below.
- The Outline tab, labeled '1' in the image below is where the user will select the columns to display on the report.
 - Place your cursor in the Add column... box ('2') and a list of available columns will pop up. Click a column from the list to add it to the report. It will automatically be added to the bottom of the list of columns (and will be the farthest column to the right of the report). The user can rearrange the order of the columns by clicking on the column name under the Add column...box and holding the mouse button down while dragging the column up or down. Release the mouse button when the column is in the correct place.
 - To remove columns from your report, simply click the 'X' next to the column name you wish to remove.
 - Users can group the records by up to three Rows ('3') and/or by up to two Columns ('4'). Place cursor in the Add group... box under GROUP ROWS or under GROUP COLUMNS and select the columns you want to group by from the list that pops up.
 - To select filters for your report, click the Filters tab ('5').



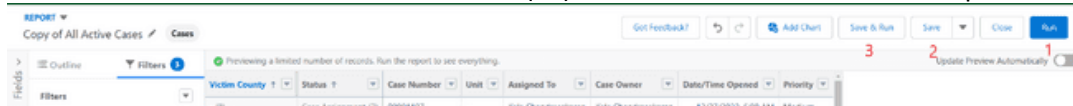
- f. Add filters by placing your cursor in the Add filter... box and selecting the items you want to filter on. Some filters, like date fields and picklist fields, will have additional options to choose from. In the example below the user added the Date/Time Opened field and the larger red box opened for the user to select criteria for the filter. When finished the user will click the **Apply** button. Select the Locked checkbox to prevent other users from editing the filter criteria (optional).



- g. Once all filters are in place a user can add filter logic. The default is to include ALL filters, but there are times when a user requires AND/OR logic. To add filter logic, click the drop-down arrow and then the Add Filter Logic link (left image below). The filter logic defaults to AND as seen in the red box of the right image below. Change the logic in the Edit Filter Logic box (blue box below) and click the **Apply** button.



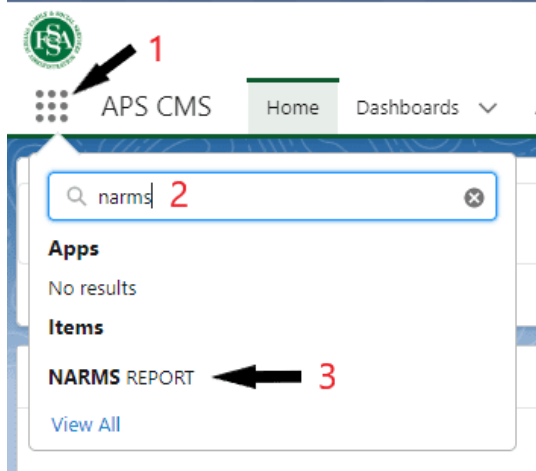
- h. When all edits to the report are complete the user has several options to run the report:
- Click the **Run** button ('1' on image below). This runs the report so the user can see what it looks like but does not save it. After viewing, select the **Edit** button to return to the report and either make additional edits or click the **Save** button ('2') if no additional edits are required.
 - Click the **Save** button ('2') to save as is.
 - Click the **Save & Run** button ('3') to save as is and see what the report looks like.



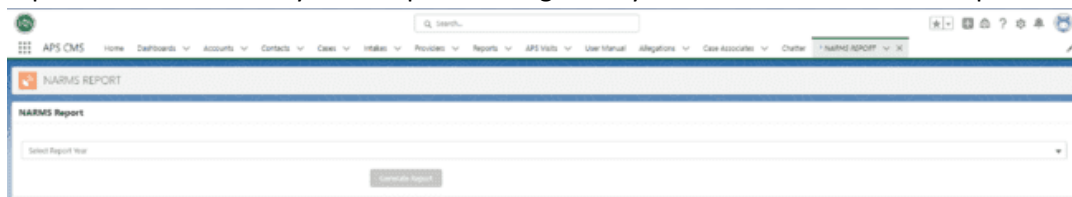
NARMS Report

To access the NARMS Report:

- Click the Waffle Menu
- Type 'narms' (without quotation marks) into the search box
- Click on NARMS REPORT in the list that displays



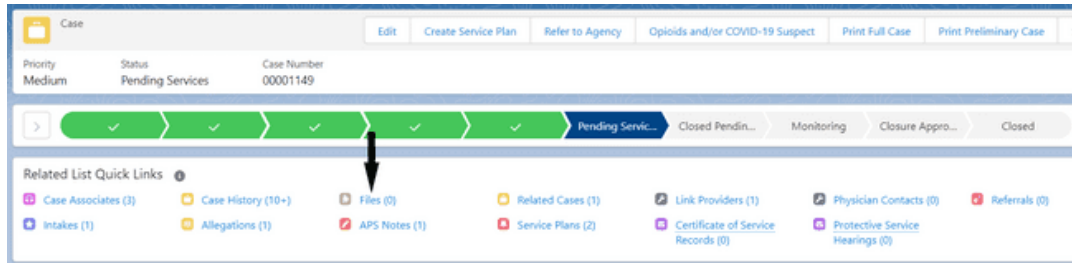
- Select the Report Year from the drop-down list and then click the **Generate Report** button. The report will download to your computer. Navigate to your Downloads folder and open the report.



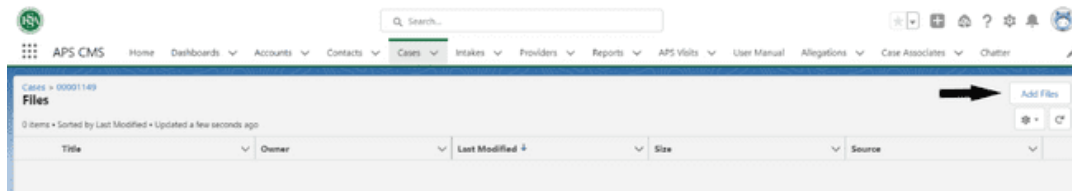
Attaching Files

Attaching Files to Cases and Intakes

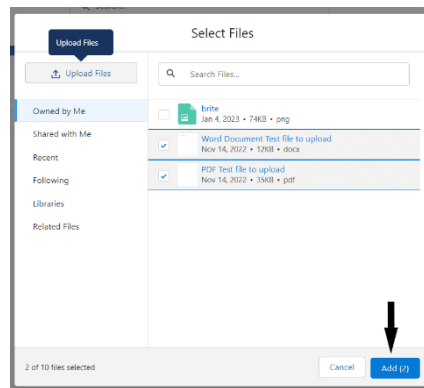
1. Open the Case or Intake to which you want to attach a file.
2. In the Related List Quick Links section click the Files link.



3. Click the **Add Files** button.



4. Users can search for files (photo, doc, pdf) that already exist in the APS CMS program by typing keywords into the Search Files... box. Users can also click the **Upload Files** button to upload files from their computer.
5. Select the files to add and then click the **Add** button.



6. The added files will appear on your screen. Click the title of the file to open it.

