

**Client Assistance System (CAS) 3.2
Training for Chapters
Course Outline as of August 22, 2008**

M1: CAS Basics– for all CAS users

Session: M1: CAS Basics

Audience: All CAS users. This module is a pre-requisite for all other CAS modules.

Description: This module is designed to introduce the Client Assistance System, its purpose and how it works. It covers:

1. CAS Conventions
2. System Windows
3. Toolbar
4. Fields
5. Navigation buttons
6. Hyperlinks
7. Workflow
8. Logging into the CAS
9. Search for an Incident
10. Search for an Existing Client
11. Search for Assigned Client Cases

Prerequisites: None

Format: Online self-study only

Duration: Approximately 1 hour

Materials: Please consult the following materials:

1. Job Aids – CAS Basics
2. Presentation – CAS Basics

M2: Create a Client Case – for all CAS users

Session: M2: Create a Client Case

Audience: This course is designed for case workers. All CAS use are encouraged to take this class. **This module is a prerequisite for Modules 3, 4, 5, and 6.**

Description: This module details all of the steps required to create a client case in the CAS and perform casework tasks in the CAS that do not involve providing assistance via CAC, DO, or referral. It covers:

1. Create a New Client Case
2. Collect New Client Information
3. Document How Client is Affected
4. How to Document Comments
5. How to Flag a Case for Needed Activity Status
6. How to Document Signed Releases
7. How to Flag a Case for Complete Activity Status
8. How to Document Chapter Specific Information
9. How to Flag a Case for All needs are met

Prerequisites: M1: CAS Basics

Format: Online self-study or online instructor-led presentation, module exercises, and Q&A

Duration: Presentation is 1 hour

Materials: Please bring the following materials to class:

1. Job Aids – CAS Create a Client Case
2. Presentation – CAS Create a Client Case
3. Exercises – CAS Exercises, Module 2

PLEASE NOTE: Before you come to class, please make sure that your computer will work in the CAS Training Environment as detailed on your class confirmation e-mail.

M3: Needs and Assistance – for all CAS users

Session: M3: Needs & Assistance

Audience: This course is designed for case workers. All CAS members are encouraged to take this class. **This module is a prerequisite for Modules 4, 5, and 6.**

Description: This module builds on Module 2 by providing instructions on how to use the CAS to provide assistance to a client. It covers:

1. How to Issue Assistance Using a CAC
2. How to Verify CAC Transaction Status
3. How to Issue Assistance Using a DO
4. Issuing Referrals for Items
5. Issuing Other types of assistance (e.g. ARC checks/non-ARC checks)
6. View all Item Issuances and Referrals

Prerequisites: M1: CAS Basics and M2: Create a Client Case.

Format: Online self-study or online instructor-led presentation, module exercises, and Q&A

Duration: Presentation is 1 hour

Materials: Please bring the following materials to class:

1. Job Aids – CAS Needs & Assistance
2. Presentation – CAS Needs & Assistance
3. Exercises – CAS Exercises, Module 3

PLEASE NOTE: Before you come to class, please make sure that your computer will work in the CAS Training Environment as detailed on your class confirmation e-mail.

M4: CAS Supervisor Functions – for Supervisors

Session: M4: CAS Supervisor Functions

Audience: This course is designed for supervisors; most of the functions it covers are available only to users with supervisor permissions.

Description: This module details the CAS procedures Supervisors use. It covers:

1. Supervisor: How to Assign a Case
2. Supervisor: How to Monitor a Case at a Glance
3. Supervisor: Review Case for Pending or Failed Transactions
4. Supervisor: Flagging for Reviewed Activity Status
5. Supervisor: Deleting a Case
6. Supervisor: Closing a Case

Prerequisites: M1: CAS Basics, M2: Create a Client Case, and M3: Needs and Assistance

Format: Online self-study or online instructor-led presentation, module exercises, and Q&A

Duration: Presentation is 1 hour

Materials: Please bring the following materials to class:

1. Job Aids – CAS Supervisor Functions
2. Presentation – CAS Supervisor Functions
3. Exercises – CAS Exercises, Module 4

PLEASE NOTE: Before you come to class, please make sure that your computer will work in the CAS Training Environment as detailed on your class confirmation e-mail.

M5: Chapter Disaster Operations – for Disaster Operations Staff

Session: M5: Chapter Disaster Operations

Audience: This course is designed for disaster operations staff; the functions it covers are available only to users with disaster operations permissions.

Description: This module covers CAS procedures Disaster Operations personnel can use. It covers:

1. Create an Incident (including assigning facilities)
2. Close an Incident
3. How to Associate Chapters
4. Add Geographic Impact and EEI Information (Job Aid only)
5. Add PDA Information (Job Aid only)
6. Add DDA Information (Job Aid only)

Prerequisites: M1: CAS Basics, M2: Create a Client Case, and M3: Needs and Assistance

Format: Online self-study or online instructor-led presentation, module exercises, and Q&A

Duration: Presentation is 1 Hour

Materials: Please bring the following materials to class:

1. Job Aids – CAS Chapter Disaster Operations
2. Presentation – CAS Chapter Disaster Operations
3. Exercises – CAS Exercises, Module 5

PLEASE NOTE: Before you come to class, please make sure that your computer will work in the CAS Training Environment as detailed on your class confirmation e-mail.

M6: CAS Reports – for all CAS users

Session: M6: CAS Reports

Audience: All CAS users.

Description: The last CAS module identifies the various reports provided by CAS and Webi. It covers:

1. Identify the different types of CAS Reports and explain their purpose
2. View, Print and Save the different types of CAS Reports
3. Identify CAS reports available in the Webi System

Prerequisites: M1: CAS Basics, M2: Create a Client Case, M3: Needs and Assistance, and Webi Report Consumer.

Format: Online self-study only

Duration: Approximately 1 hour

Materials: Please consult the following materials:

1. Job Aids – CAS Reports
2. Presentation – CAS Reports