OVERVIEW:

The Placement Census module manages the validation of a child's current placement and any additional open services (line item placements). There are three components to this module:

1. Case Manager's Census of his/her case load
2. Supervisors validation of his/her case managers Census
3. Reporting which shows monthly success rate of case managers performing their census

Case Manager's Census:

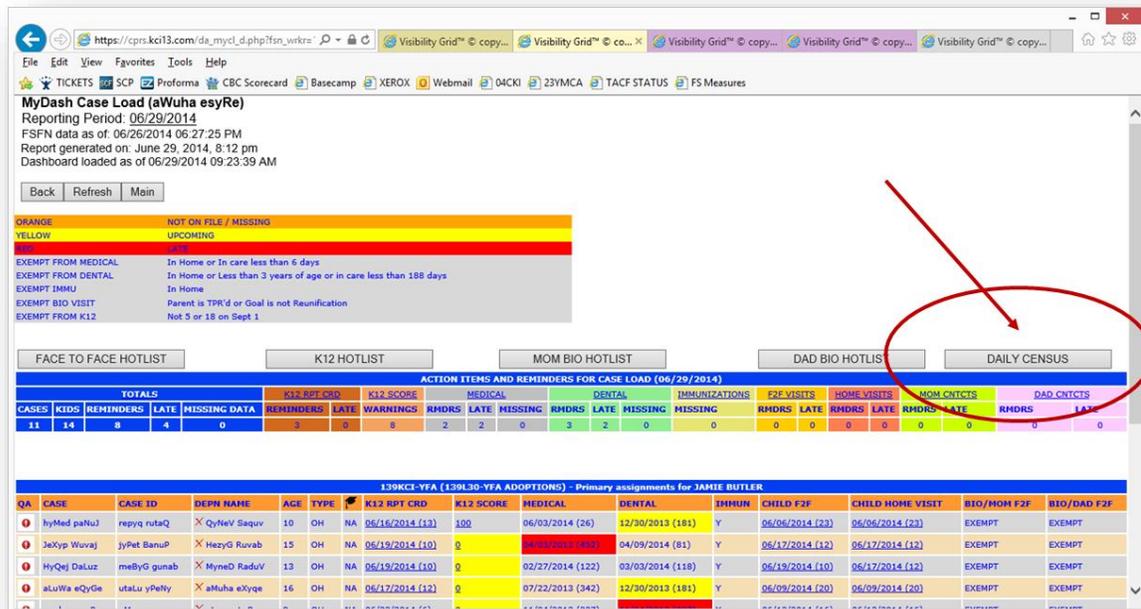The Case Manager can view their case load at their MyDash (shown below).

Figure 1, Case Manager MyDash

Directly above the Ribbon Bar (which shows the totals) there is a button labeled "DAILY CENSUS" or "WEEKLY CENSUS" (depending on the Agency configuration). The Case

Manager can use this button to access and manage their Census. Please note: there is no other way for a case manager to access their census other than from their MyDash.

The census (shown below) presents the case manager with a list of each of their children (for which they are primary).

Figure 2, Case Managers Daily Census View

The color coded dots are interactive by either hovering over the dot to see the last action that took place (the user who performed the last action and the timestamp will be displayed); or by clicking a given dot to toggle between green and red.

- Green indicates that a child has been validated for the respective day.
- Red indicates that a child was not validated for the respective day.

In order for the report to reflect that the Census has been complete, a Case Manager must validate every child in his/her case load. NOTE: if configured for Daily, the validation must occur each day; if weekly, the validation must occur once each week.

When the entire case load is validated, the bottom icon will reflect as such with the Verified icon (shown below):
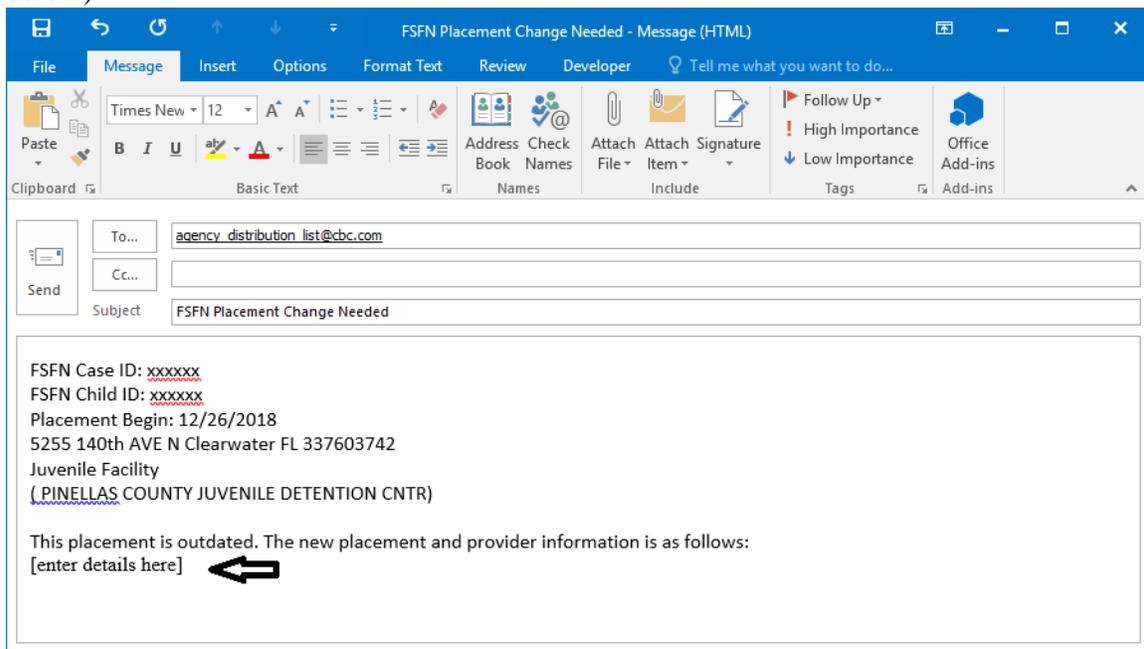
Change Request

When it is determined that an individual child's placement or service is outdated or incorrect, the user (case manager or supervisor) can select the CHANGE REQUEST icon (the envelope) shown below:

Once the envelope icon is selected, a new email will be opened and auto populated (see below)

The user must enter the details required for the recipient to take the necessary action. The recipient is configured as a "send to" address in the Mindshare configuration.

NOTE: sending the email **does not** automatically validate the census. The user must still click the red dot in order to indicate that this child's details were reviewed. Once toggled to green, the option for the email is no longer available.

Override / One Button Validation of Case Load

At the bottom of the case load, there is a button that allows the user to validate the entire case load with a single button. See below:

After selecting override to validate the entire case load the icon will change to Verified, as will each of the red dots for the individual child.

NOTE: using this override option only validates those records that **WERE NOT ALREADY VALIDATED INDIVIDUALLY.** Therefore, if the user were to attempt to invalidate, it will only revert back those records that were previously overridden.

Therefore, if each record is validated individually, the Verified icon would appear, however, clicking it to invalidate the case load will have no effect. Records individually verified would need to be individually invalidated.

Supervisor Review and Daily Census Report:
Supervisors and certain users that have been granted access can select on the Main Menu
item labeled "DAILY CENSUS" or "WEEKLY CENSUS"; shown below.

Figure 3, Census Menu Item for Reports and Supervisor Review

A report is displayed allowing the user to select the fiscal year, fiscal month, agency or
unit. Without selecting and Agency and Unit, ll agencies and units are displayed with the
respective totals and success breakdown. An example of the report is shown below:

Figure 4, Census Report and Supervisor Review

If the user is the supervisor for the selected unit, the user will be presented with the
ability to select a given day for a given worker. This will present the Supervisor with that
workers Census for the day chosen. The Supervisor can also make changes to a Case
Managers Census. This activity is recorded for audit and review. [end of document]