



# *Person Management*

This packet contains the exercises listed below. In all of these exercises, you will act as a caseworker in a county children's services department. Complete the exercises at your own pace. If you need help, remember to use your User Guide, WBT, online help, or online policies. Ask the trainer for assistance if you can't find the answer to your questions in these sources.

## **What you'll do**

**Exercise 1.** Create a Record for a Person -- P. 2

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**Important:** These exercises may not reflect the process flow at your county or office. They use contrived data for training purposes. Still, you can apply what you learn in class to the processes at your office.

Also: Reports cannot be generated in the training region. To become familiar with location and steps for accessing; please follow steps for accessing reports presented in the exercises. When the hour glass appears, click on "cancel".



## Exercise PM-1. Create a Record for a Person

### Scenario

You've been assigned to complete an assessment/investigation for the case of Evelyn Spring. Evelyn is an unmarried mother with an 11 year-old son named Rickie. Evelyn's previous boyfriend, Nick Youngblood, has just moved out and her new boyfriend, Dakota Yana, has moved in. End date and deactivate Nick as a case member, and then create a person record for Dakota.

### Tasks

- Task 1. Display the case for Evelyn Spring
- Task 2. End date and deactivate Nick Youngblood
- Task 3. Search for Dakota Yana
- Task 4. Create a new record
- Task 5. Record demographic information
- Task 6. Record address and contact information
- Task 7. Record employment information
- Task 8. Record military service
- Task 9. Record criminal history
- Task 10. Record a safety hazard

**Task 1. Display the case for Evelyn Spring**

Go to your workload and display the Case Overview screen for this case.

1. On the Ohio SACWIS Home screen, click the **Case** tab.
2. Click the **Workload** tab.
3. Click **Lake##, Brandy** to display a list of work items.
4. Click the case ID number for Evelyn Spring's case.

**Result** The Case Overview screen appears.

**Note** Edits can be recorded to a person record via the universal search feature.

**Task 2. End date and deactivate Nick Youngblood**

Nick was a member of the household, but he's moved out and is no longer involved with Evelyn.

1. On the Case Overview screen, click **View Case Information**. The system displays a set of tabs with the **Case Detail** tab selected by default.
2. Click the **Members** tab.
3. Find Nick Youngblood in the Member List, and click the **edit** link beside his name. The Member Details screen appears.
4. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>End Date</b>	03/18/2006	
<b>Reason for Deactivation</b>	Moved out	

5. Click **OK**. The system returns to the **Members** tab. Nick is no longer shown in the Member List. However, he is still listed on the Member History screen.
6. Click **Apply** to save this change.

**Result** The system saves your work without leaving the **Members** tab.

**Note** The radio button for the CRP is only selected when you wish to change the case reference person.

**Task 3. Search for Dakota Yana**

It's critically important not to create two or more records for the same person. You should always search for an existing person record before you create one. Search for Dakota to see if he's already in the database.

1. On the **Members** tab, click **Add Member**. The Person Search screen appears.
2. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Last Name</b>	<i>Yana##</i>	
<b>First Name</b>	<i>Dakota</i>	
<b>Date of Birth</b>	<i>11/06/1981</i>	

3. Click **Search**. There are no search results.

**Result** There is no existing record for Dakota in the system.

**Task 4. Create a new record**

Dakota isn't already in the system, so you need to add a person record for him.

1. On the Person Search screen, click **Add Person**. The system displays the Person Information screen. Based on the information you entered for the search, some fields have been prefilled.
2. Complete the following fields with the data shown:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>SSN</b>	789-##-3456	Click radio button for Add/Edit beside SSN first
<b>Birth City</b>	Laramie	
<b>Birth Country</b>	USA	

3. Dakota is also known as "Bear." You should note this in the system, so click **Add AKA**. The AKA Details screen appears.
4. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>First Name</b>	Bear	
<b>Last Name</b>	Yana	

5. Click **Save**. The system returns to the Person Information screen, where Dakota's AKA name is now displayed.
6. Click **Apply** to save your work.

**Result** When you click **Apply**, the system creates a record for Dakota. The system saves your work but does not leave the Person Information screen.

**Task 5. Record demographic information**

Add information about Dakota’s race and ancestry, the languages he speaks, and his marital status. All of this information is entered on the **Demographics** tab.

1. Click the **Demographics** tab.
2. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Race</b>	American Indian	
<b>Hispanic/Latino</b>	No	
<b>Available Ancestry</b>	Native American	Click <b>Add&gt;</b> to move your selection to the <b>Selected Ancestry</b> field.
<b>Available Language</b>	English	Click <b>Add&gt;</b> .

3. Click **Add Marital Status**. The Marriage/Relationship history Details screen appears.
4. Complete the following fields as shown:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Marriage/Relationship Status</b>	Unmarried Couple	
<b>Spouse/Significant Other Name</b>	<i>Evelyn Spring</i>	

5. Click **Save**. The system returns to the **Demographics** tab. The information you just entered is now displayed in the Marital Details table.
6. Click **Apply**.

**Result** The system saves your work without leaving the **Demographics** tab.

**Task 6. Record address and contact information**

Most personal contact information—physical address, phone numbers, and email addresses—are located on the **Address** tab. The Address can be copied from someone another person in the case. Dakota has moved in with Evelyn, so copy Evelyn’s address to Dakota (from the Member List screen), and then add specific information for Dakota (on the Address tab in his person profile).

1. Click **Save**. The system returns you to the Member List screen.
2. Click **Copy Address**. The Select Primary Address to Copy screen appears.
3. Click the **Select** link for Evelyn Spring to copy her address. The Copy Address To screen appears.
4. Click beside Dakota Yana## and then click **Save**. The system notes the Primary Address change has been saved.
5. Click **Close**. The system returns you to the Member List screen.
6. Click Dakota Yana##’s name link. The system takes you to his person profile.
7. Click the **Address** tab and view the address you have just copied for Dakota, and then click **Add Phone/Email**. The Phone/Email Details screen appears.
8. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Type</b>	Cell	
<b>Primary</b>	Select this check box.	
<b>Phone/Email</b>	513-256-4431	
<b>Description</b>	<i>Only phone number for Dakota.</i>	

**Note** The **Phone/Email** field accepts both phone numbers and email addresses. When entering phone numbers, be sure to type the hyphens: for example, 614-258-4563, not 6142584563.

9. Click **Save**. The system saves the information and returns to the **Address** tab, where the new information is displayed. Then: To add an email address, click **Add Phone/Email** again.

10. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
Type	Email	
Phone/Email	<a href="mailto:bear1098@aol.com">bear1098@aol.com</a>	

11. Click **Save**. The system saves the information and returns to the **Address** tab.

12. Click **Apply**.

**Result** The system saves your work without leaving the **Address** tab.

**Task 7. Record employment information**

Use the Employment History screen to enter information about Dakota’s current job. (This screen is also used to enter information about insurance, income, expenses, and financial resources.)

1. Click the **Employment** link in the row of links above the tabs. The system displays the Employment History screen.
2. Click **Add Employment**. The Employment Details screen appears.
3. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Begin Date</b>	02/23/2005	
<b>Employer</b>	Mike’s Meat Market	
<b>Phone</b>	216-344-1919	

4. Click **Save**.

**Result** The system saves your work and returns to the Employment History screen.

**Task 8. Record military service**

Dakota served in the Army and received a dishonorable discharge. Use the Military History screen to add information about Dakota’s military service to his person record.

1. Click the **Military** link. The Military History screen appears.
2. Click **Add Military Record**. The Military Record Details screen appears.
3. Complete the following fields as shown:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Branch</b>	Army	
<b>Date Entered</b>	06/01/2002	
<b>Date Discharged</b>	12/30/2004	
<b>Type of Discharge</b>	Dishonorable	
<b>If Other than Honorable Discharge, Explain</b>	Convicted of assaulting an officer	

4. Click **Save**.

**Result** The system returns to the Military History screen, which now displays information about Dakota’s military service.

**Task 9. Record criminal history**

Dakota has a criminal record—a single conviction for assault and battery. Use the **Background** tab to record this information in his person profile.

1. Click the **Profile** link. The system returns to the Person Information screen.
2. Click the **Background** tab.
3. In the **Does the Person have a Criminal History?** field, select Yes.
4. Click **Add Criminal History**. The Criminal History Details screen appears.
5. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Offense</b>	Assault & Battery	
<b>City</b>	Laredo	
<b>State</b>	Colorado	
<b>Conviction Date</b>	03/12/2004	
<b>Sentence</b>	6 months incarceration	
<b>Probation or Parole</b>	No	

6. Click **Save**. The system returns to the **Background** tab. Information about Dakota's offense is now displayed in the Criminal History list.
7. Click **Apply**.

**Result** The system saves your work without leaving the **Background** tab.

**Task 10. Record a safety hazard**

Conviction of a violent crime creates a safety hazard that needs to be linked to Dakota's record. Your final task is to record the offense and a brief description of the crime on the **Safety Hazard** tab.

1. Click the **Safety Hazard** tab.
2. In the list of safety hazards, select **Convicted of a Violent Crime**.
3. In the **Safety Hazard Narrative** field, type: *Convicted of assault and battery in 2004. Served a six-month sentence.*
4. Click **Apply**. The system saves your work without leaving the **Safety Hazard** tab.
5. Click the **Basic** tab. Find the **Safety Hazard Exists** field. (It's just above AKA Names.) The field is now checked because Dakota's record includes conviction of a violent crime.
6. Click **Save**.

**Result** The system saves your work and returns to the **Members** tab of the Spring case. You have completed this exercise.

## **Exercise PM-2. Record Address and Educational Information**

### **Scenario**

Update person information in Ohio SACWIS to reflect new information about the following events:

The family is moving.

Rickie is attending a new school, where he's having an attendance problem.

You learn that Rickie's biological father is a Native American.

### **Tasks**

Task 1. Record the change of address

Task 2. Update Rickie's race and ancestry

Task 3. Record Rickie's new school

Task 4. Record a behavioral problem

**Task 1. Record the change of address**

Dakota, Evelyn, and Rickie are moving today. Use the **Address** tab to record the family's new address, repeating the procedure separately for each case member.

1. In the Member List, click Evelyn's name. The Person Information screen appears.
2. Click the **Address** tab.
3. Click the **edit** link beside the current address. The Address Details screen appears.
4. In the **End Date** field, type today's date.
5. Click **Save**. The system returns to the **Address** tab. The old address is no longer displayed there.
6. Click **Add Address**. The Domestic Address Details screen appears.
7. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Address</b>	5## E Main Street	
<b>City</b>	Columbus	
<b>State</b>	Ohio	
<b>Zip</b>	43215	
<b>Address Type</b>	Residence	
<b>Effective Date</b>	Today's date.	

8. Click **Search**. The system displays the address in the search results.
  9. Click the **select** link beside the address. The system returns to the Person Address screen for Evelyn. The new primary address replaces the previous one.
  10. Click **Save** on the Person Address screen. The system returns to the **Members** tab for the case.
  11. Click on **Copy Address**. System takes you to the Select Primary Address to Copy screen.
  12. Select Evelyn Spring. System takes you to the Copy Address To screen.
  13. Select both Rickie and Dakota. Click **Save**. Receive message Primary Address change has been saved.
  14. Click **Close**
  15. Click **Apply** to save your work.
- Result** The system saves your work without leaving the **Members** tab.

**Task 2. Update Rickie's race and ancestry**

You have learned that Rickie's biological father is a Native American and that Rickie is affiliated with the Chippewa Indian Tribe. Add this information to Rickie's person record.

1. Click Rickie's name in the Member List. The Person Information screen appears.
2. Click the **Demographics** tab.
3. In the Race area, select **American Indian**.
4. In the **Available Ancestry** field, select Native American. Click **Add>** to move your selection to the **Selected Ancestry** field.
5. Click **Apply**.

**Result** The system saves your changes without leaving the **Demographics** tab.

**Task 3. Record Rickie's new school**

Evelyn's move put the family in a new school district. End date Rickie's current school and then update his record with information about the new school.

1. Click the **Education** link. The **School Profile** tab appears.
2. In the School History area, click the **edit** link beside Rickie's current school. The School Details screen appears.
3. In the **End Date** field, type today's date.
4. Click **Save**. The system returns to the **School Profile** tab and displays the end date beside Rickie's current school.
5. Click **Add School**. The system displays a blank School Details screen.
6. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>District</b>	Columbus City	
<b>School Name</b>	Manual Middle School	
<b>Category</b>	Public	
<b>Type</b>	Primary	
<b>Start Date</b>	Use today's date.	
<b>Beginning Grade</b>	Sixth	
<b>School Contact</b>	Amelie Sanchez	
<b>Phone, Ext</b>	603-333-1212, x590	

7. Click **Save**.

**Result** The system saves your work and returns to the **School Profile** tab. The new school appears in the School History list.

**Task 4. Record a behavioral problem**

Rickie is increasingly disobedient both at home and at school. Record this behavior in Rickie's person record.

1. Click the **Profile** link to return to the Person Information screen.
1. Click the **Characteristics** tab.
2. In the **Characteristic Group** field, select Emotional/Behavioral.
3. Click **Add Characteristic**. The Characteristics Details screen appears.
4. In the **Characteristic** field, select Difficulty Accepting and Obeying Rules.
5. Click **Save**. The system saves your changes and returns to the **Characteristics** tab. A new row appears in the table, displaying the information you just entered.
6. Click **Save** on the **Characteristics** tab. The system returns to the **Members** tab for the case.
7. Click **Save** on this tab.

**Result** The system returns to the Case Overview screen. You have completed this exercise.

## Exercise PM-3. Record medical information

### Scenario

You are assigned a voluntary case. Your agency is providing preventative services to Monica Taylor, a single mother. She has a son, Matthew, and is expecting a baby soon. Record the birth in the system, and record other information related to the children's health care.

### Tasks

- Task 1. Display Monica Taylor's case
  
- Task 3. Record information about the baby's birth
  
- Task 2. Create a new person record when the baby is born
  
- Task 4. Record information about the hospital
  
- Task 5. Record Samantha's immunizations
  
- Task 6. Record new medication for Matthew

**Task 1. Display Monica Taylor's case**

Navigate to this case, which is assigned to Sam Weaver.

1. Click the **Case** tab.
2. Click the **Workload** tab.
3. Click **Weaver##, Sam**. The system displays a list of cases assigned to Sam.
4. Click the case ID number for Monica's case.

**Result** The Case Overview screen for her case appears.

**Task 2. Create a new person record when the baby is born**

Monica had a baby girl at St. Mary’s Hospital. The baby was born on February 5 and named Samantha.

Create a simple person record for the baby and add her to the case as a member. Of course there is no person record for this newborn child, but you’ll still have to search the database before you can create a person record for her.

1. Click the **View Case Information** link. The system displays the **Case Detail** tab.
2. Click the **Members** tab.
3. Click **Add Member**. The Person Search screen appears.
4. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Last Name</b>	Taylor##	
<b>First Name</b>	Samantha	

5. Click **Search**. There is no record for Samantha.
6. Click **Add Person**. The Person Information screen appears. Samantha’s first and last names prefill the appropriate fields.
7. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Gender</b>	Female	
<b>Date of Birth</b>	02/01/2006	
<b>Birth City</b>	Columbus	
<b>Birth State</b>	Ohio	

8. Click **Save**.

**Result** The system saves your work and returns to the case **Members** tab. You have created a person record for Samantha and added her to the case.

**Task 3. Record information about the baby's birth**

Add information about Samantha's birth to her person record.

1. In the Members List, click Samantha's name. The Person Information screen appears.
2. Click the **Medical** link. The Health Care Provider History screen appears.
3. Click the **Birth** tab.
4. Complete the following fields on the **Birth** tab:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Hospital of Birth</b>	St. Mary's	
<b>County</b>	Franklin	
<b>Birth Weight (lbs./oz.)</b>	7 lbs. 1 oz.	
<b>Birth Length (in.)</b>	19	
<b>Gestational Term (weeks)</b>	35	
<b>Duration of Labor</b>	8 hours	
<b>Delivery Type</b>	Vaginal	
<b>Blood Type</b>	A	

5. Click **Apply**.

**Result** The system saves the information you've entered without leaving the **Birth** tab.

**Task 4. Record information about the hospital**

The system enables you to record a history of providers who deliver medical services to clients. Add St. Mary's to Samantha's person record.

1. Click the **Provider** tab.
2. Click **Add Provider**. The system displays the Health Care Provider Information screen.
3. Click **Search Provider**. The system displays the Provider Profile Search screen.
4. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
Provider Name	St. Mary's Hospital	
Provider Type	Hospital	

5. Click **Search**.
6. Find St. Mary's Hospital in the search results and click its **select** link. The system returns to the Health Care Provider Information screen and displays the information for St. Mary's there.
7. In the **First Visit** field, type *02/05/2006*.
8. Click **Save**. The system saves the information and returns to the Health Care Provider History screen.
9. Click **Apply** on the Health Care Provider History screen.

**Result** The system saves your work without leaving the screen.

**Task 5. Record Samantha's immunizations**

Two months have passed. During a follow-up call to Monica, you learn that Samantha has had her DTP (Diphtheria, Tetanus, Pertussis) vaccination and her second Hepatitis B shot. (Samantha received her first Hepatitis B vaccination at birth.) Record information about the new vaccinations in Samantha's person profile.

1. Click the **Immunization** tab.
2. Click **Add Immunization**.
3. Complete the following fields as shown:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Immunization Type</b>	Hepatitis B	
<b>Date of Immunization</b>	Enter today's date.	

4. Click **Save**. The system saves your work and returns to the **Immunization** tab.
5. Repeat steps 2 through 4, adding the following information:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Immunization Type</b>	Diphtheria/Tetanus/Pertussis	
<b>Date of Immunization</b>	Enter today's date.	

6. In the **Immunizations Are Up-To-Date** field, select Yes.
7. Click **Save**.

**Result** The system saves the information and returns to the case **Members** tab.

**Task 6. Record new medication for Matthew**

During the same conversation mentioned in the previous exercise, Monica also tells you that her son, Matthew, has been diagnosed with ADHD. His doctor has prescribed Ritalin for him. Record this information in Matthew's person profile.

1. In the Member List, click Matthew's name. The system displays the Person Information screen.
2. Click the **Medical** link. The Health Care Provider History screen appears.
3. Click the **Medication** tab.
4. Click **Add Medication**. The Medication Information screen appears.
5. Complete the following fields as shown:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Name</b>	Ritalin	
<b>Dosage</b>	20 mg up to 3x per day	
<b>Medication Required Daily</b>	Yes	
<b>Prescribed By</b>	Dr. Ronald Smith	
<b>Date Prescribed</b>	01/12/2006	

6. Click **Save**. The system saves the information and displays the medication screen with a new row for Ritalin.
7. Click **Save** again.

**Result** The system saves your changes and returns to the case **Members** tab. You have completed this exercise.