

### **Executive Summary**

CARES LIVE 2.6 released on 09/07/2019 includes the following Child Welfare History Snapshot enhancements:

- Left Navigation Menu that allows a CARES user to navigate to the following Cards:
  - Client (expands as the user adds clients to the view)
  - Relationship
  - History
- Attach link functionality to Relationship Card:
  - Attach related clients to the current view of the person profile page.
  - See related client's relationships and history on the same page without the need to search on each client individually.
  - Attach link will display next to client's name in the Relationships Card.
  - Users will be able to attach relationships based on permissions granted by their county.
- Remove link functionality to Relationship Card:
  - Allows user to remove the view of attached related persons from the person profile page.
  - Remove Link will display on the top right-hand corner of the Person Card.
- User Trace Log Files:
  - Enables Snapshot to track user actions, such as what the user searched for and which person card was accessed. This will have no impact on user interaction.

### **Release Description**

- This release was focused on restoring Snapshot functionality to the Core Counties. The functionality allows users to attach information regarding related clients. Additionally, users can now search using multiple search criteria rather than a single search bar to allow more refined results.
- Additional non-user functionality – CARES Snapshot will be able to capture User Trace Log Files which will provide a report regarding user actions in Child Welfare History Snapshot and can be generated at the request of a County Director. The procedure to request and receive a User Trace Log will be provided at a later date.

**Child Welfare History Snapshot**

The following enhancements are for Child Welfare History Snapshot:

#	Child Welfare History Snapshot - Enhancement Description
1	<p>Attach and Remove features – Users will now be able to attach related clients to a person profile view to see related client’s relationships and history of involvement without searching for each client individually. Additionally, users will also be able to remove the related persons they attached from the person profile view.</p> <p><b>Attach</b> The Attach link will appear next to each client’s name on the Relationships card. Once the link has been clicked, the Client Info, Relationships and History cards will be updated with information pertaining to the attached client.</p> <p><b>Remove</b> The Remove link will be placed in the upper right corner of each person's card and will display only when two or more person cards are present.</p>
2	<p><b>Left-Side navigation</b> - ability to navigate to Client, Relationship, and History Cards using Left Navigation.</p>
3	<p><b>User Trace Log</b> – A report regarding user actions in Child Welfare History Snapshot that can be generated at the request of a County Director. Procedures to request this report will be published at a later date. This report will capture the following:</p> <ul style="list-style-type: none"> <li>• The Staff ID of the user who is searching in Snapshot</li> <li>• Date and Timestamp of the actions</li> <li>• The Search criteria that was used in the search</li> <li>• The Client ID that was viewed by the staff person</li> </ul>
4	<p><b>Service Provider Phone Number</b> was changed to Staff Person Phone Number – Search Results grid is clearly labeled and organized so that information can be obtained in an easy manner.</p> <ul style="list-style-type: none"> <li>• The Service Provider Phone number is relabeled to Staff Person's Phone Number</li> <li>• The Service Providing County and Staff Person's Phone Number are moved to the end of the grid.</li> </ul>

### Known Issues/Limitations

A user cannot edit a single number that is not at the end of the Social Security Number or Client ID Number fields. Therefore, a user must delete all of the numbers and reenter the entire value.

If a user would like to search and view two unrelated clients in Snapshot, there are two options to accomplish this:

1. The user can create a relationship in CWS/CMS between the two clients (if allowed per policy and legal mandates). After the relationship is established in CWS/CMS, the user will see the newly formed relationship upon searching for the person and opening their person profile in Snapshot.
2. The user can open Snapshot in a second window or tab in their browser. The user can search and view two unrelated clients in Snapshot at the same time within the same browser, but in different windows or tabs.