



# **Resources and Usages**

## **Resource Guide**

---

March 11, 2025

## Contents

Overview .....	6
Resources .....	6
Usages.....	6
Slots .....	7
Resource Categories .....	7
Housing Emergency Configuration .....	8
Resources Summary Form.....	8
Add a Resource.....	9
Resource Menu .....	10
Edit.....	11
Usages - Housing.....	11
Lockers.....	22
Parking.....	23
Delete.....	25
Usage Menu .....	25
Slot Inventory.....	25
Edit.....	29
HMIS SETUP.....	29
Room Designer .....	30
HMIS Slot Inventory .....	34
Short Edit.....	34
Seasonal Beds .....	35
Slot History .....	35
Delete Usage.....	36
Edit Multi-Service Quantity.....	36
Housing Emergency Case Management.....	37
Resource Usages .....	37
Provider Resources Form.....	38
Single Service Usage .....	39

Slot Check in Manager.....	39
Slot Reservation .....	46
Check-in.....	49
Roster/Check in .....	51
Wait List .....	53
Resource Log.....	54
Housing Check-In .....	56
Availability Report.....	57
Check-In Roster Report.....	59
Housing Emergency Absence .....	60
Multi-Service Usage.....	61
Check-In with Multiple Services .....	62
Set Individual Service.....	63
Check-In with Selected Services.....	64
Absence W/ Selected Services .....	65
Assigning Lockers and Parking Spots.....	66
Classroom Configuration .....	68
Resources Summary Form.....	68
Add a Resource.....	69
Resource Menu .....	71
Edit.....	71
Usages - Classroom .....	71
Lockers.....	81
Parking.....	83
Keywords .....	83
Usage Menu .....	85
Slot Inventory.....	85
Edit.....	88
Copy .....	89
Class Room Designer.....	90

Short Edit .....	94
Wait List .....	94
Slot History .....	96
Delete Usage.....	96
Edit Multi-Service Quantity .....	96
Course Quizzes and Tests .....	97
Skill and Credential .....	99
<b>Classroom Case Management .....</b>	<b>100</b>
Organization Tab.....	100
Provider Resources Form.....	102
Resource Menu .....	103
Slot Check in Manager.....	103
Slot Reservation .....	109
Check-in.....	112
Roster/Check in .....	114
Absence.....	116
Wait List .....	116
Availability Report.....	118
Check-In Roster Report .....	119
Case Management Tab.....	121
Class Calendar.....	121
Classwork .....	127
Classwork Summary .....	127
Classwork Dashboard .....	128
Attendance Rate .....	128
Class Reservation .....	129
Class Attendance .....	129
Class Activity.....	130
Lockers and Parking.....	135
Client Calendar.....	137

---

Suggested Classes.....	138
Class, Housing, and Event History.....	139
Appendix.....	140

# Overview

The Provider Resource and Usage functionality tracks the locations and facilities that providers use to deliver services to Clients. This ensures accurate data collection and Resource management.

This guide provides an in-depth review of the CaseWorthy Resources and Usages functionality. It begins by exploring what Resources and Usages are, followed by a comprehensive list of the various Resource Categories available within the system. Each Resource Category serves a unique purpose and requires a specific setup based on its intended use case. To assist with understanding these differences, a table detailing the categories, their descriptions, and key configuration requirements is included in the [Appendix](#).

Since it is not feasible to document every possible Resource Category and scenario, this guide focuses on configuring and using two primary Resource Usages: Housing Emergency and Classroom. These examples provide a detailed look at how Resources can be effectively set up and managed. If you need guidance on using a different Resource Category, additional support is available. You can reach out to [support@caseworthy.com](mailto:support@caseworthy.com) or [training@caseworthy.com](mailto:training@caseworthy.com) for further assistance.

## Resources

A Resource is a designated space and/or time where Clients receive services. Each Resource is categorized under a Resource Category, which defines its type and purpose.

Examples of Resources:

- Classrooms
- Housing units
- Meeting rooms

## Usages

A Resource Usage describes how a Resource is utilized based on its type. Each Resource can have multiple Usages, providing flexibility in how services are documented.

Examples of Resource Usages:

- Classes held in a classroom.
- Bed nights tracked in a housing unit.
- Workshops conducted in a meeting space.

## Slots

Usage Slots are the specific spaces into which Clients are reserved and checked in.

Examples of Usage Slots:

- Beds
- Desks

## Resource Categories

There are several Resource Categories available. The selected category affects how the Resource and Usage features operate within the application.

To ensure the Resource and Usage Functionality operates as expected, proper setup and configuration must be implemented.

Refer to the [Appendix](#) for additional information about each Resource Category available, including a description of when to use a specific Category, as well as required configuration.

# Housing Emergency Configuration

One of the most frequently used Resources is Housing Emergency, which offers immediate housing assistance to individuals and families facing urgent situations like eviction or homelessness.

We will begin by covering the setup process for Resources and Usages, followed by a step-by-step guide on how to use this functionality effectively.

As discussed in the first section, a Resource refers to a designated space and/or time where Clients receive services. Each Resource is assigned to a Resource Category, which defines its type and purpose. Resource Usage specifies how a Resource is utilized based on its type, and each Resource can have multiple Usages, allowing for flexibility in service documentation.

In this example, we will create a Housing Emergency Resource with two locations, which are referred to as Usages. Since these Usages include beds, they will be configured with a Usage Type of “Slots”.

It is important to note all configuration takes place within the Administration tab.

## Resources Summary Form

To view a list of existing Resources for a Provider, open the *Resources* summary form.

**Navigation** Administration tab: Setup > Organizations – Organizations menu > Providers – Providers menu > Resources

Category	Resource Name	Units / Slots	Capacity	Resource ID
Classroom	Classroom C	Slots	15	2634
Classroom	Downtown Classroom	Slots	5	2635
Classroom	Classroom D	Slots	10	2642
Housing Emergency	Downtown Campus	Slots	10	2628
Housing Emergency	South Campus	Slots	5	2633

Each Resource includes its assigned **Category**, identifying name, Resource type, which is either “Units” or “Slots”, and its Resource capacity.

## Add a Resource

Let us start with adding a new “Housing Emergency” Resource. Select ADD RESOURCE.

The screenshot shows a software interface titled "Edit Resource". A sub-header says "Select a category, name and capacity for the usage." The form contains the following fields:

- Resource Name \***: South Campus
- Category \***: Housing Emergency
- Type (Slots or Units) \***: Slots
- Capacity \***: 15
- Slot Setup Type \***: Slots Created During Setup

At the bottom right are "Save" and "Cancel" buttons.

**Resource Name** can be anything that describes the Resource or the place and or time that the Provider uses to offer services.

- If the Provider only offers services out of its own location, this may be a room number within that location.
- If they offer services from various locations in the community, this may be the address or name of the community building.

The **Category** should reflect how the Resource is used, and the selection will determine what other functionality will become available during setup, as well as in Case Management. In this example, we will select “Housing Emergency”.

The **Type (Slots or Units)** describes the type of space but more specifically the space into which Clients will be reserved and checked into.

- “Units” are typically used when there is one Resource used by multiple Clients at one time, like an apartment.
- “Slots” are typically one slot per Client. For example, beds in a Housing Emergency shelter. We will select “Slots” in this example.

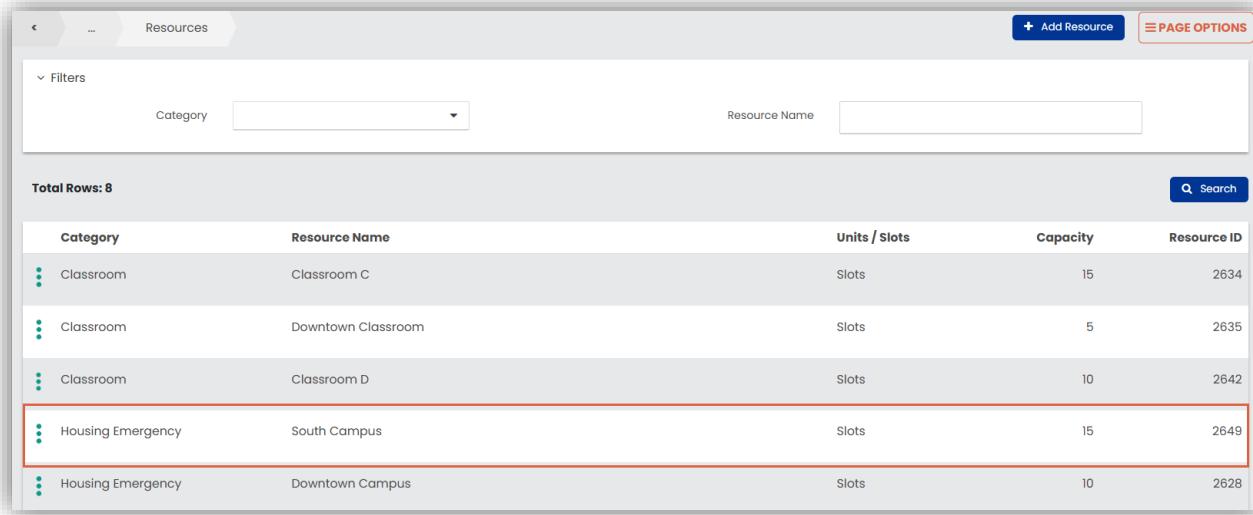
**Slot Setup Type** determines if the slot should be created when the Usage is initially created by the System Administrator or during the Client check-in process. Because Housing

Emergency has a limited number of beds, selecting “Slots Created During Setup” is the preferable option and will save you time when configuring your Usages later.

Enter the **Capacity** for the Resource, which is the maximum number of Clients the Resource can support, such as five beds.

Select SAVE.

The new Resource is now displayed on the summary form.

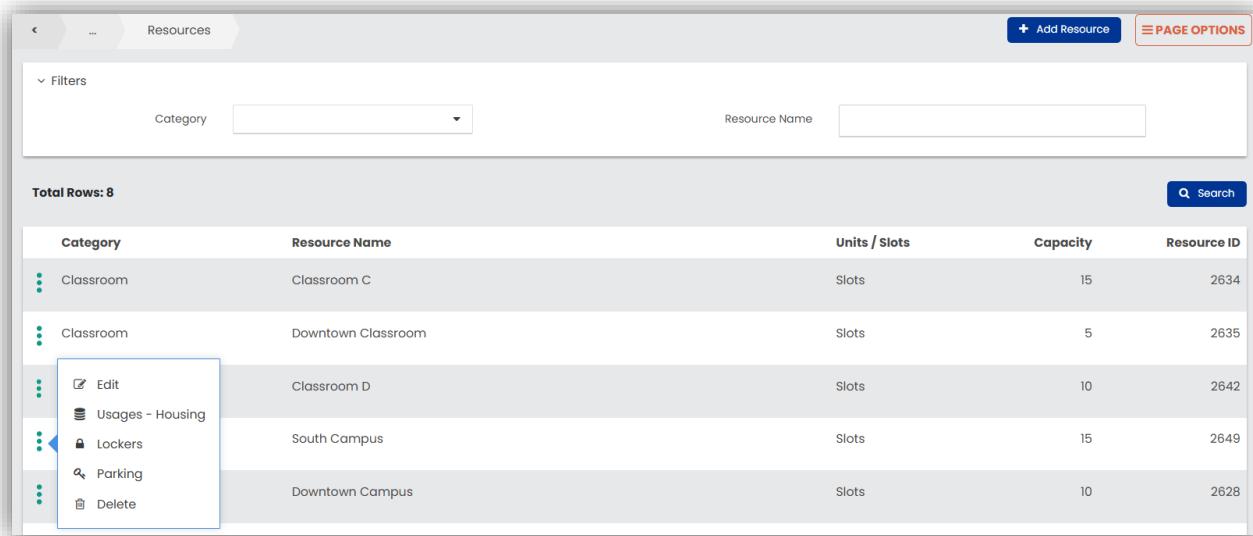


A screenshot of the CaseWorthy Resources list page. The page header includes a back arrow, three dots for more options, the word "Resources", a blue "+ Add Resource" button, and a "PAGE OPTIONS" button with a red border. Below the header is a search bar with a dropdown for "Category" and a text input for "Resource Name". A message "Total Rows: 8" is displayed above the table. The table has columns: Category, Resource Name, Units / Slots, Capacity, and Resource ID. The data rows are:

Category	Resource Name	Units / Slots	Capacity	Resource ID
Classroom	Classroom C	Slots	15	2634
Classroom	Downtown Classroom	Slots	5	2635
Classroom	Classroom D	Slots	10	2642
Housing Emergency	South Campus	Slots	15	2649
Housing Emergency	Downtown Campus	Slots	10	2628

## Resource Menu

Use the vertical ellipsis menu to further configure the Resource. The menu is dynamic and changes depending on the Resource Category assigned.



A screenshot of the CaseWorthy Resources list page, similar to the previous one but with a context menu open for the "Downtown Classroom" row. The menu is triggered by a vertical ellipsis icon and contains the following items: Edit, Usages - Housing, Lockers, Parking, and Delete. The "Edit" item is checked. The data rows are identical to the previous table:

Category	Resource Name	Units / Slots	Capacity	Resource ID
Classroom	Classroom C	Slots	15	2634
Classroom	Downtown Classroom	Slots	5	2635
Classroom	Classroom D	Slots	10	2642
Housing Emergency	South Campus	Slots	15	2649
Housing Emergency	Downtown Campus	Slots	10	2628

Since the Resource Category is “Housing Emergency” in this example, the menu allows you to edit the Resource, create and manage associated Usages, create and assign lockers and parking, as well as delete the Resource.

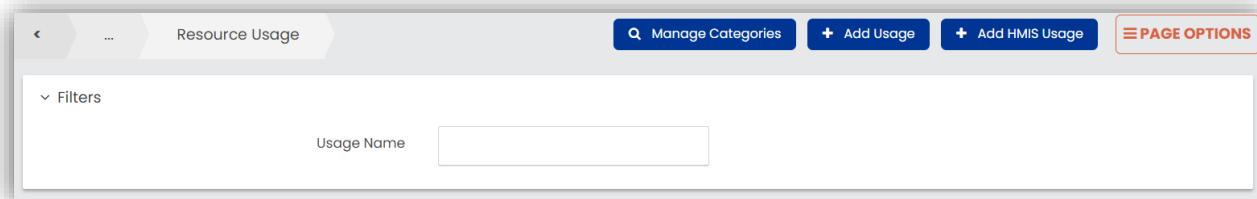
## Edit

Use Edit to update the details of the Resource.

## Usages – Housing

Once a Resource is created, Usages must also be added. Remember, the Usages are how the Resource is used or reserved based on its type, which in this example is “Housing Emergency”.

Select Usages – Housing to view a list of existing Usages. Since this is a new Resource, there are no existing Usages.



The MANAGE CATEGORIES button at the top allows you to manage the list of available categories that can be assigned to a Usage. A category is not required, but it can be useful for filtering search results.

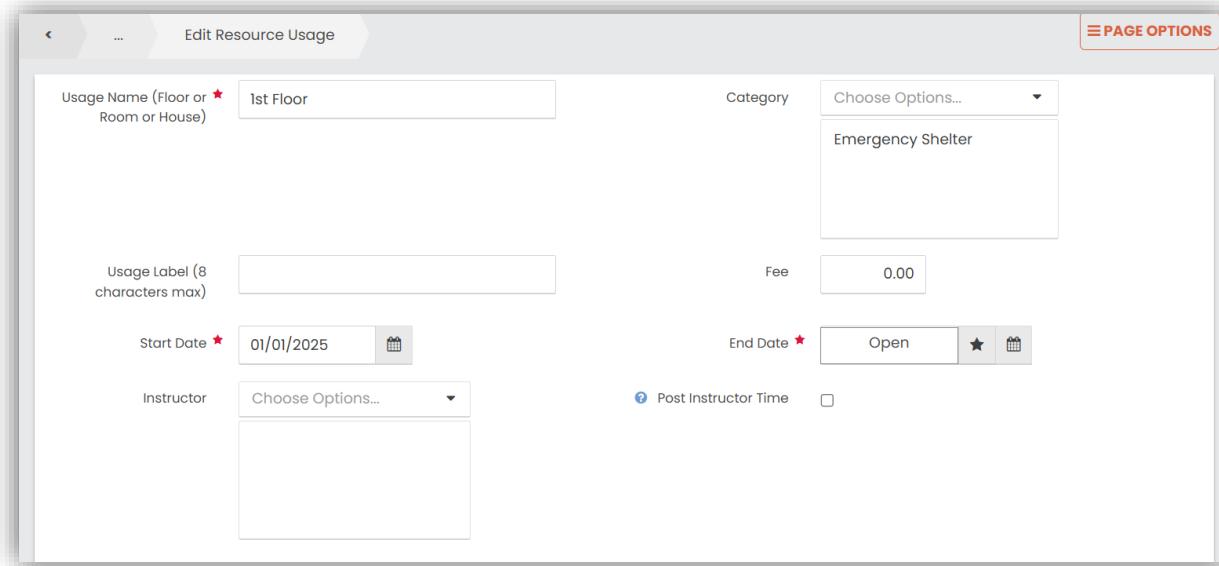
Add any necessary categories before continuing to add the Usages.

There are two options for adding new Usages, Add USAGE and ADD HMIS USAGE.

Both options are similar.

The ADD HMIS USAGE option includes additional options, displays individual slot details, and is useful for HMIS functionality.

If you are not using HMIS, ADD USAGE is the recommended method for adding a Usage.



In this example, we are creating two emergency shelter Usages which are available to distinct groups of Clients. If both areas had the same accessibility and availability, two separate Usages would not be necessary.

The first Usage is exclusively available for women and children.

**Usage Name** is a description used to differentiate this Usage from others within the same Resource.

**Category** is used to filter on forms and reports. The categories can be updated through MANAGE CATEGORIES on the *Resource Usage* summary form.

It is important to note that some functionalities within Resources and Usages do require a specific Usage Category to be assigned. In this example, a Category is not required. For more details about different Resource Categories, refer to the [Appendix](#). For questions about setup, please contact [training@caseworthy.com](mailto:training@caseworthy.com) or [support@caseworthy.com](mailto:support@caseworthy.com).

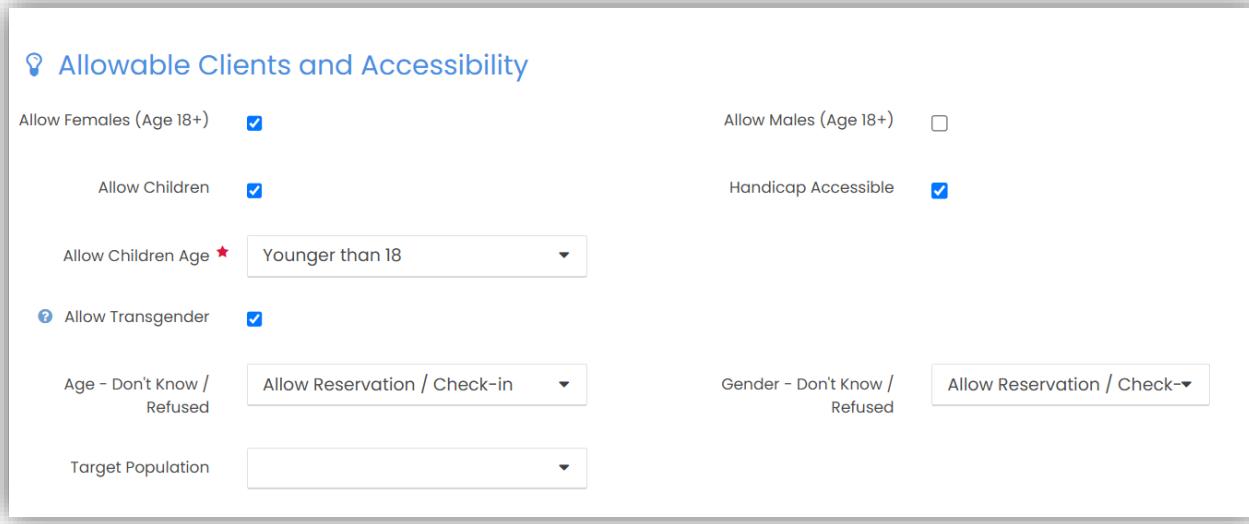
Select **Allow Same Day Reservation** if Clients can make a reservation the same day they will be checking in to the Usage.

**Usage Label, Fee, Instructor, and Post Instructor Time** are not required for a simple Resource Usage configuration but can be entered, as necessary.

The **Start Date** and **End Date** define the availability of the Usage. The **End Date** can be entered or can be set to “Open” by clicking the star icon. The date is set to “Open” by default.

The Allowable Clients and Accessibility section determines who is allowed access to the Usage.

A validation process occurs when the individual's reservation is entered. If the Usage does not permit the Client based on these settings, the system will not allow the transaction to be saved.



**Allowable Clients and Accessibility**

Allow Females (Age 18+)

Allow Males (Age 18+)

Allow Children

Handicap Accessible

Allow Children Age ★

Allow Transgender

Age - Don't Know / Refused

Gender - Don't Know / Refused

Target Population

Most of these options are based on the details from the *Client Demographics* form.

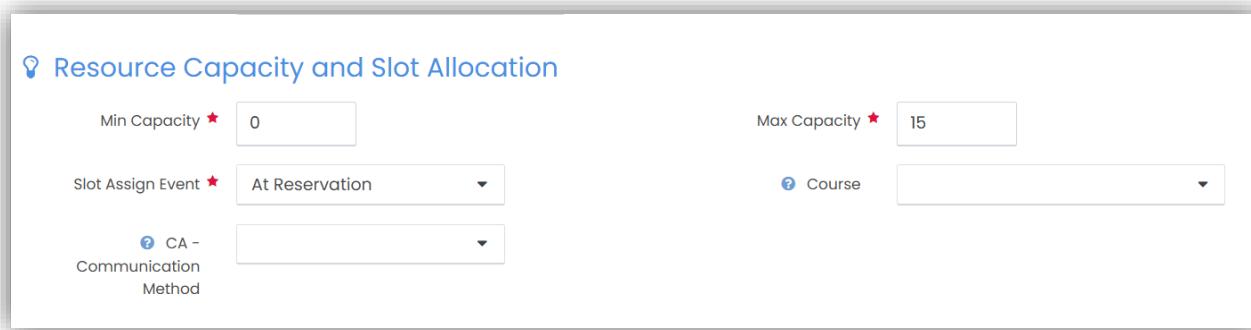
If you select **Allow Children**, an additional field is displayed allowing you to specify the child's age group. Select "Younger than 18" to allow every child access to this Usage.

**Handicap Accessible** is the one item that will not affect the validation process but notes the accessibility of the Usage.

On the *Client Demographics* form, there are options with the **Date of Birth** and **Gender** fields where the User can either select "Client Doesn't Know" or "Client Refused". If these options were selected for the Client, the age and gender cannot be determined by the application and may affect the Resources and Usages functionality here. Therefore, in the **Age-Don't Know/Refused** and **Gender-Don't Know Refused** fields, you can indicate if the Usage should be allowed for these instances.

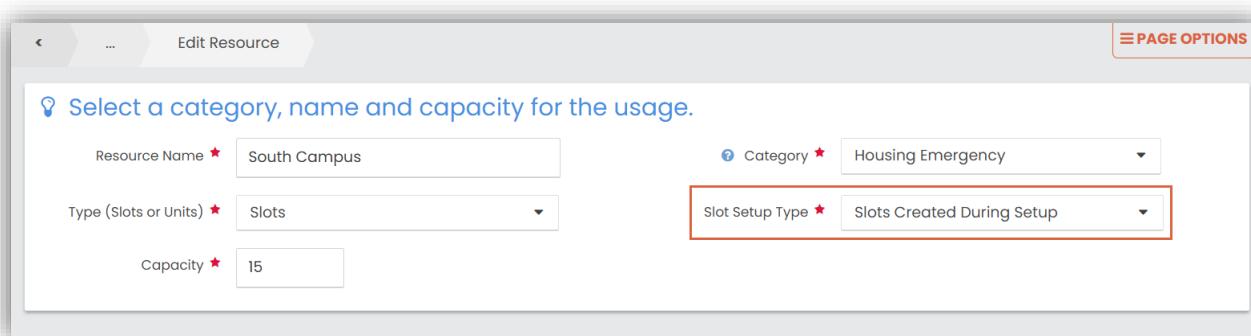
The **Target Population** identifies if the Usage is reserved for certain populations. This information will then be copied into all the Usage slots if they are automatically generated.

The items within Resource Capacity and Slot Allocation define the capacity of the Usage and when a slot or unit for the Usage is assigned.



**Min Capacity** and **Max Capacity** set how many Clients the Usage can accommodate.

If the Usage's Resource was configured to automatically create slots during setup, the max entered determines the number of slots that will be automatically generated upon the saving of the Usage.



It is important to note that “Housing Emergency” Resources must have slots created during set up or they will not be available for any reservations.

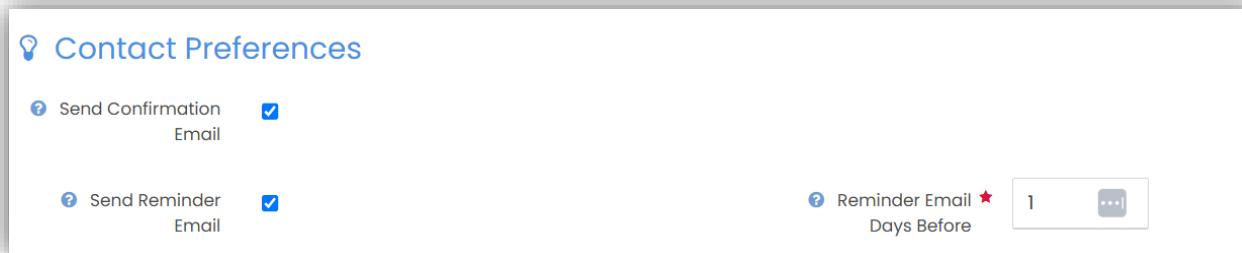
The next option is **Slot Assign Event**. It is important to note that **Slot Assign Event** for the Usage is different than **Slot Setup Type** for the Resource itself.

- **Slot Assign Event** determines when the Usage's slots are assigned to Clients. Slots in an emergency shelter are most likely beds. This option allows you to specify if the beds, which are slots, are assigned during the reservation or during check-in.
- With a “Housing Emergency” Resource Category, it is recommended that you assign the bed (slot) when the reservation is made to keep track of general availability. To follow this recommendation, select “At Reservation” for the **Slot Assign Event**.

**Course** is the next option and is disabled unless this is a “Classroom” Resource Category.

**CA – Communication Method** is used with the Coordinated Entry functionality. The method selected here determines the type of communication that will be used with the Provider. The field is not required.

The Contact Preferences section is used to configure when confirmation and reminder emails are sent to the Client about their reservations for the Usage.



**Contact Preferences**

Send Confirmation Email

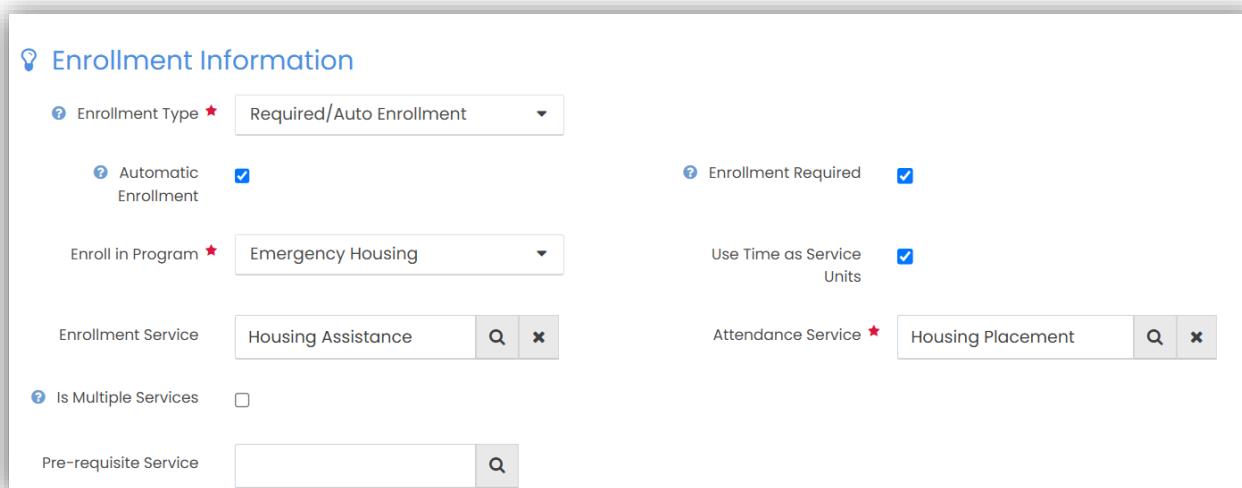
Send Reminder Email  Days Before

Select **Send Confirmation Email** to automatically send an email message to the Client when the reservation is saved. The message is sent to the email address on the *Client Demographics* form.

Select **Send Reminder Email** to automatically send an email message to the Client as a reminder of the upcoming reservation. An additional field appears that prompts you to enter how many days before the reservation the email message should be sent. For example, if you enter “1”, an email message will automatically be sent to the Client’s email address 1 day before the reservation begin date.

## Enrollment Type

In the Enrollment Information section, use **Enrollment Type** to specify if program enrollment is necessary for access to the Usage. Configuration is performed for how services are recorded to the Client’s record as well.



**Enrollment Information**

Enrollment Type  Required/Auto Enrollment

Automatic Enrollment

Enrollment Required

Enroll in Program  Emergency Housing

Use Time as Service Units

Enrollment Service

Attendance Service  Housing Placement

Is Multiple Services

Pre-requisite Service

**Enrollment Type** defines how a program enrollment is managed. Options include “Required/Auto Enrollment”, “Enter Enrollment”, “Enter Enrollment Optional”, and “No Action Required”.

## Required/Auto Enrollment

If the Client must be enrolled in a program to have access to the Usage, “Required/Auto Enrollment” or “Enter Enrollment” should be selected for **Enrollment Type**.

When “Required/Auto Enrollment” is selected, additional fields appear.

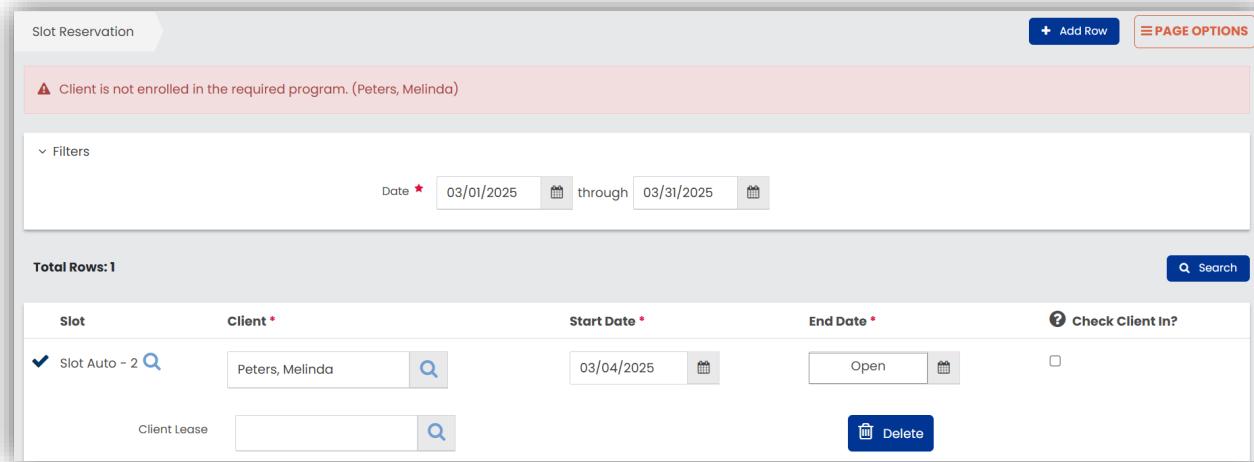
The screenshot shows the 'Enrollment Information' section of the CaseWorthy software. It includes fields for Enrollment Type (set to Required/Auto Enrollment), Automatic Enrollment (checked), Enrollment in Program (set to Emergency Housing, highlighted with a red border), Attendance Service (set to Housing Placement, highlighted with a red border), and Enrollment Required (checked and highlighted with a red border). Other fields like Enrollment Service and Is Multiple Services are also present but not highlighted.

Select **Enrollment Required** if the Client must be enrolled in the specified program to access this Usage.

If **Automatic Enrollment** is selected, the Client will be automatically enrolled into the selected program if they are not already enrolled. Necessary assessments will still need to be completed, but this prevents the User from having to leave the reservation process to complete the necessary enrollment. If this is not selected, and enrollment is required, they will have to leave the reservation process to complete the enrollment process first. If enrollment is required to gain access to the Usage and its services, select the program for which they should be enrolled here.

It is important to understand a few details about this specific configuration:

- When **Enrollment Required** is selected, the Client will not be allowed access to this Usage if they are not already enrolled in the program identified in **Enroll in Program**.

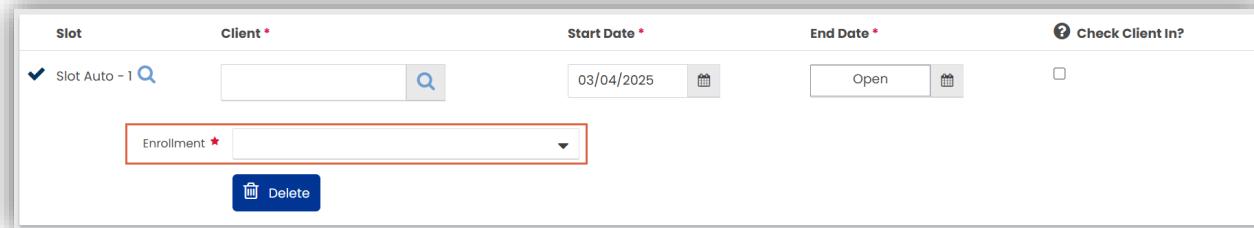


The screenshot shows the 'Slot Reservation' interface. At the top right are buttons for '+ Add Row' and 'PAGE OPTIONS'. A red error message box contains the text: '⚠ Client is not enrolled in the required program. (Peters, Melinda)'. Below this is a 'Filters' section with date range inputs ('Date \* 03/01/2025 through 03/31/2025'). The main table has a header row with columns: Slot, Client \*, Start Date \*, End Date \*, and a checkbox for 'Check Client In?'. One row is listed: 'Slot Auto - 2' with client 'Peters, Melinda', start date '03/04/2025', end date 'Open', and an unchecked 'Check Client In?' box. Below the table are buttons for 'Client Lease' and 'Delete'.

- When **Automatic Enrollment** is selected along with **Enrollment Required**, the Client will be automatically enrolled in the specified program if they are not already.

## Enter Enrollment

When “Enter Enrollment” is selected, the User will be required to select an existing enrollment upon entering the reservation.



The screenshot shows the same 'Slot Reservation' interface as above, but the 'Enrollment \*' dropdown menu is open and highlighted with a red border. The dropdown list includes 'Enrollment \*' and other options. The rest of the page elements are identical to the first screenshot.

## Enter Enrollment Optional

When “Enter Enrollment Optional” is selected, the User will be prompted to select any of the Client’s active enrollments upon entering the reservation, but doing so is optional. If an enrollment is not selected, the Usage will not be reportable in association with a program.

Slot	Client *	Start Date *	End Date *	<input checked="" type="checkbox"/> Check Client In?
Bunk Bed B1	<input type="text"/>	03/04/2025	12/31/2025	<input type="checkbox"/>
<input style="width: 100%; border: 1px solid red;" type="text" value="Enrollment"/> <div style="margin-top: 5px;"> <span> Delete</span> </div>				

## No Action Required

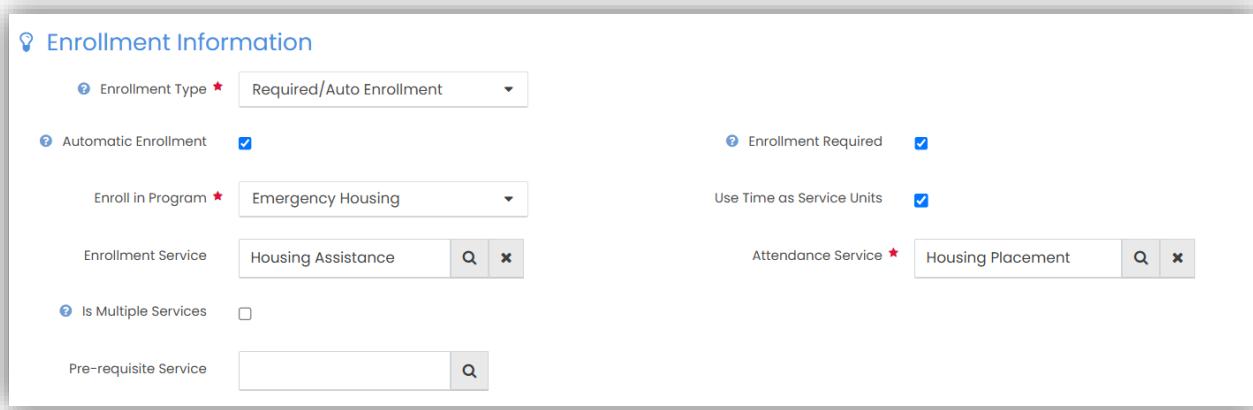
When “No Action Required” is selected, the User entering the reservation or during check-in will not be presented with an option to select a program enrollment. If this option is selected, the Usage will not be reportable in association with a program.

Slot	Client *	Start Date *	End Date *	<input checked="" type="checkbox"/> Check Client In?
Bunk Bed A1	Peters, Melinda	03/04/2025	Open	<input type="checkbox"/>
<input style="width: 100%;" type="text" value="Client Lease"/> <div style="margin-top: 5px;"> <span> Delete</span> </div>				

For this example, select “Required/Auto Enrollment” as the **Enrollment Type**. Also select both **Automatic Enrollment** and **Enrollment Required**. Also select an appropriate service for **Enroll in Program**.

These settings indicate the following:

- When reservations are made for the Usage, the system will check to see if the Client is a woman or child.
- The system will then check to see if the Client is enrolled in the program set in the **Enroll in Program** field.
- If the Client is not enrolled, the system will automatically enroll them and allow the reservation to be saved.



The screenshot shows the 'Enrollment Information' section of a software interface. It includes the following fields:

- Enrollment Type:** Required/Auto Enrollment (radio button selected)
- Automatic Enrollment:** Checked (checkbox)
- Enrollment Required:** Checked (checkbox)
- Enroll in Program:** Emergency Housing (dropdown menu)
- Use Time as Service Units:** Checked (checkbox)
- Enrollment Service:** Housing Assistance (dropdown menu with search and clear icons)
- Attendance Service:** Housing Placement (dropdown menu with search and clear icons)
- Is Multiple Services:** Unchecked (checkbox)
- Pre-requisite Service:** (empty dropdown menu with search icon)

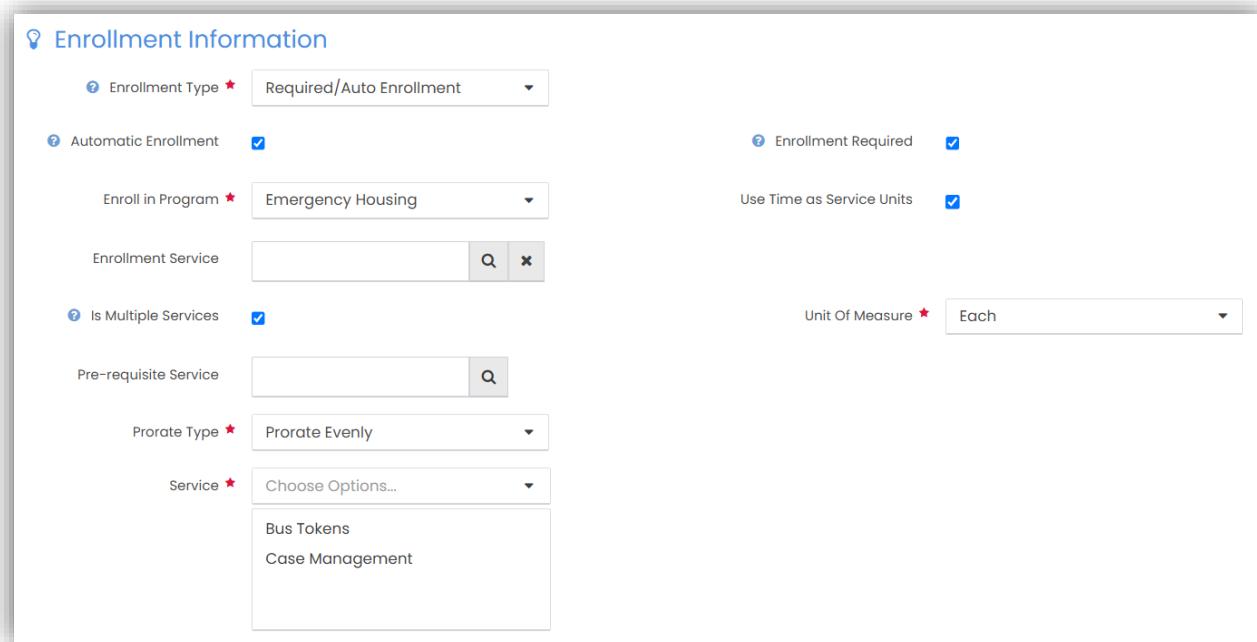
Next is **Use Time as Service Units**. When selected, the unit of time will be used rather than the unit configured for the service. This field is not required.

There are two types of services that can be associated with this Usage.

- The **Enrollment Service** is used to record a service when the Client is initially reserved in a Usage, if necessary. Use the lookup icon to search available services.
- The **Attendance Service** will record the selected service for the Client's when the Client is checked in to the Usage. If the Client is reserved for multiple days, this service will post each day. Again, use the lookup icon to search existing services, and then select the appropriate service.

## Multiple Services

The Usage can be configured to provide multiple services to the Client. To do so, the **Enrollment Type** must be set to “Required/Auto Enrollment”.



When **Multiple Services** is selected, additional fields appear.

“Each” must be selected for the **Unit of Measure**.

In the **Service** multi-select field, choose the services that will be available to the Client.

The services that display are those associated with the program selected in **Enroll in Program** and have a **Unit of Measure** of “Each”.

**Prorate Type** determines how each of the selected services should be prorated and then posted to the Client’s record.

Options include:

- “Prorate Evenly”, which divides one post evenly by the number of services selected.
- “Post Full Quantity for Each Service” will post one full service for each of the selected services.
- And “Enter Quantity for Each Service” will prompt the User to manually enter the quantity for each service at the time of reservation or check-in. (Select Prorate Evenly.)

If a **Pre-Requisite Service** is selected, the Client will not be able to be reserved or check into this Usage if they do not have the selected service record previously recorded.

Next is **Automatic Check-In** which is used for Usages where the Client's reservation spans over multiple days.

When selected, an automatic batch process will run overnight to check the Client in for each night of their reservation. This keeps the User from having to record the check-ins manually each day.

 If "Automatic Check-In" is selected, enrolled clients will automatically be re-checked in at each defined interval indicated in the recurrence. If "Include Dates Between" is checked, when clients are checked in, they will be checked in from the date of the selected check-in until the date of the next scheduled check-in interval.

Automatic Check-In

**Recurrence** sets when the Usage is available.

For example, a “Housing Emergency” Resource is typically always available. You should select “Daily” and “All Day” for this Usage.

A Usage for a “Classroom” Resource is most often run on a weekly basis with a begin and end time.

When entering time, use military standard as there are no options for AM or PM.

 Recurrence Start/End times must be in military time i.e. 12 midnight is 00:00, 1 pm is 13:00. Single-digit times must have a leading zero, i.e. 9 am is 09:00.

Recurrence  Daily  Weekly  Monthly

Day	Start	End	All Day
Everyday	00:00	00:00	<input checked="" type="checkbox"/> All Day

Randomizer Type and Priority is used when the number of Clients needing Usage slots is greater than the number of available slots.

#### Randomizer Type and Priority

Randomizer Priority (1,2,etc)

Randomizer Type

For example, creating an overflow waitlist for Clients or increasing available Usage on a seasonal basis. If utilized, further configuration is available on the Organization tab through the Randomizers menu.

## Lockers

After the Resource Usages are created, you have the option to also add Lockers and Parking.

Let us start with lockers.

Once lockers are created, they can be associated with specific Usage slots or assigned to Clients.

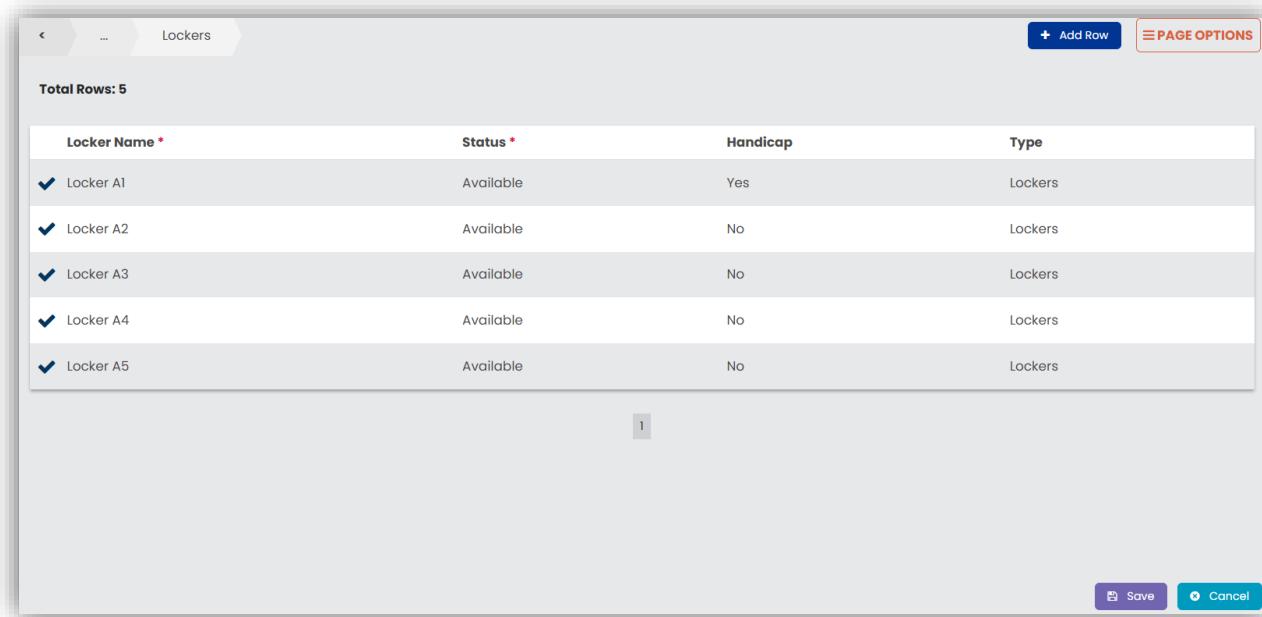


Downtown Campus	Slots	10	2628
South Campus	Slots	15	2633
West Campus	Slots	5	2641
Housing Emergency	Slots	15	2630

Off the Resource menu, select Lockers.

A list of existing lockers for the Resource is displayed, including the locker's name, availability, and if it is handicap accessible.

Each locker is added individually. To start, select ADD ROW.



Locker Name *	Status *	Handicap	Type
✓ Locker A1	Available	Yes	Lockers
✓ Locker A2	Available	No	Lockers
✓ Locker A3	Available	No	Lockers
✓ Locker A4	Available	No	Lockers
✓ Locker A5	Available	No	Lockers

Give the locker a name.

Select the **Status** of the locker, which is essentially its availability. Options include “Assigned”, “Available”, “In Development”, and “Under Repair”.

Then indicate if the locker is handicap accessible.

The **Type** is automatically set to “Lockers” by default.

Continue to add lockers as needed.

Select a record to make any necessary changes or click the X to delete the locker.

Locker Name *	Status *	Handicap	Type
✓ Locker A1	Available	<input checked="" type="checkbox"/>	Lockers
✓ Locker A2	Available	No	Lockers
✓ Locker A3	Available	No	Lockers
✓ Locker A4	Available	No	Lockers
✓ Locker A5	Available	No	Lockers

Click **SAVE** when done.

## Parking

You can also add parking spaces for this Resource, which is like adding lockers.

Once parking spaces are created, they can be associated with specific Usage slots or assigned to Clients.

Resource Name	Units / Slots	Capacity	Resource ID
Main Classroom	Slots	15	2634
Downtown Classroom	Slots	5	2635
Classroom D	Slots	10	2642

Off the Resource menu, select **Parking**.

A list of existing parking spaces for the Resource is displayed, including the parking space name, availability, and if it is handicap accessible.

Each parking space is added individually. To start, select ADD ROW.

Parking Spaces			
Total Rows: 8			
Parking Space Name *	Parking Space Status	Handicap	Type
✓ Row A, Space 1	Available	Yes	Parking Spaces
✓ Row A, Space 2	Available	No	Parking Spaces
✓ Row A, Space 3	Available	No	Parking Spaces
✓ Row A, Space 4	Available	No	Parking Spaces

Give the space a name.

Select the **Status**, which is essentially its availability. Options include “Assigned”, “Available”, “In Development”, and “Under Repair”.

Then indicate if the space is handicap accessible.

The **Type** is automatically set to “Parking Spaces” by default.

Continue to add parking spaces as needed.

Select a record to make any necessary changes or click the X to delete the parking space.

Parking Spaces			
Total Rows: 8			
Parking Space Name *	Parking Space Status	Handicap	Type
✓ Row A, Space 1	Available	<input checked="" type="checkbox"/>	Parking Spaces 
✓ Row A, Space 2	Available	No	Parking Spaces
✓ Row A, Space 3	Available	No	Parking Spaces
✓ Row A, Space 4	Available	No	Parking Spaces
✓ Row B, Space 1	Available	Yes	Parking Spaces
✓ Row B, Space 2	Available	No	Parking Spaces
✓ Row B, Space 3	Available	No	Parking Spaces
✓ Row B, Space 4	Available	No	Parking Spaces

 Save  Cancel

Click SAVE when done.

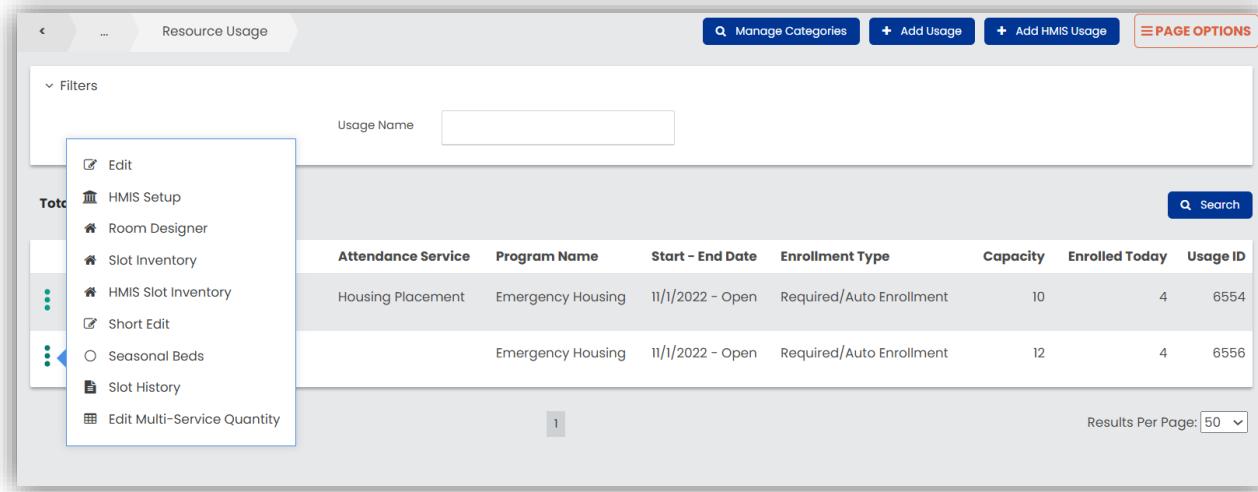
## Delete

Use Delete to remove the Resource from the Provider. Once Usages are added to the Resource, the Delete option is no longer available.

## Usage Menu

We have created our Resource and its first Usage, including lockers and parking spots. Let us now move over to the Usage menu.

The menu provides multiple options. And like the Resource menu, this menu is static and the options change depending on the Resource and Usage Category and Type.



The screenshot shows the 'Resource Usage' page. On the left, a vertical sidebar displays a list of options under 'Totals' and 'Slot Inventory'. The 'Slot Inventory' section is expanded, showing 'Edit', 'HMIS Setup', 'Room Designer', 'Slot Inventory', 'HMIS Slot Inventory', 'Short Edit', 'Seasonal Beds', 'Slot History', and 'Edit Multi-Service Quantity'. To the right, there is a search bar labeled 'Usage Name' and a 'Search' button. Below the search bar is a table with columns: Attendance Service, Program Name, Start - End Date, Enrollment Type, Capacity, Enrolled Today, and Usage ID. Two rows of data are visible: one for 'Housing Placement' and another for 'Emergency Housing'. At the bottom right of the table area, there is a 'Results Per Page' dropdown set to 50.

## Slot Inventory

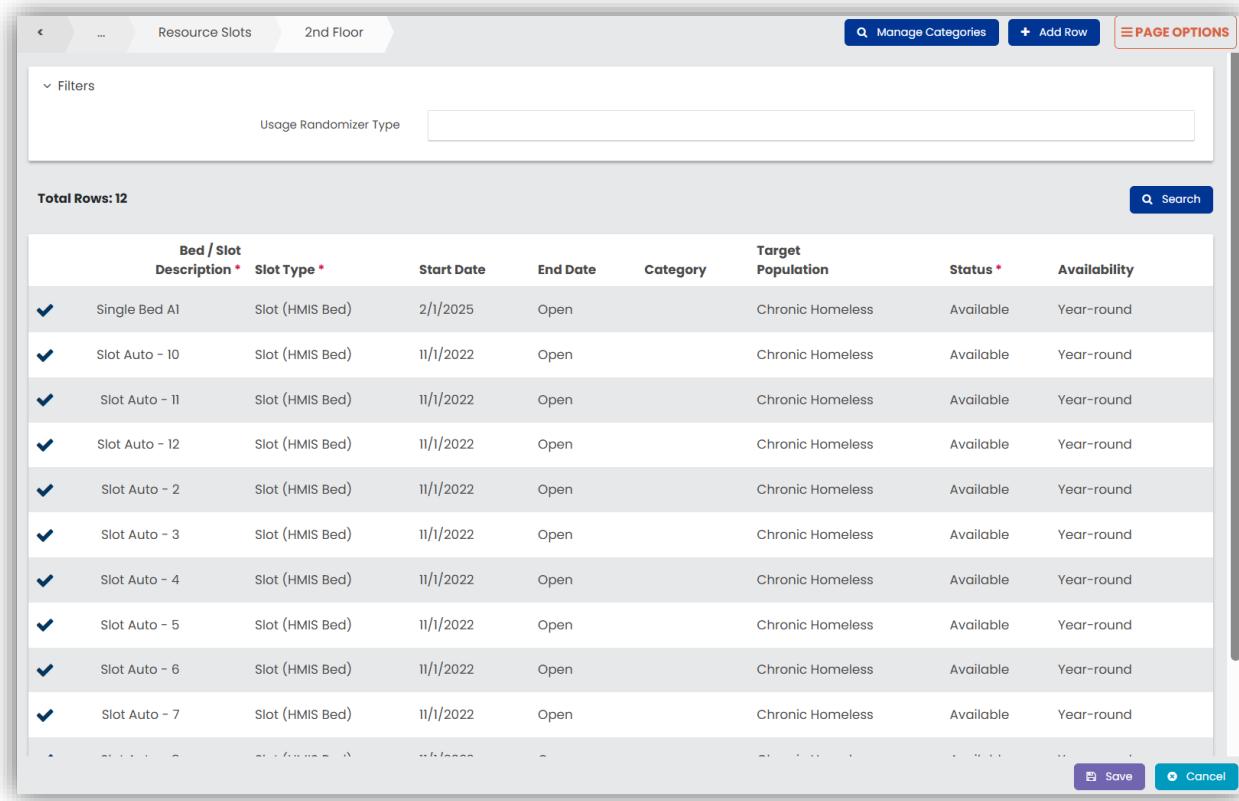
The next most logical step is to set up the Usage's slots. Slots can be created and managed using either Slot Inventory or the Room Designer. We will explore Slot Inventory in this example.

Once the slots are created, we will start back at the top of the Usage menu and explore the other options.

There are a few important notes about slots:

- Reservations for the “Emergency Housing” Resource cannot occur until slots are created for the Usage.
- If the Resource was configured to create slots during setup, slot creation occurs automatically when the Usage is saved and is based on the capacity entered.
- In Emergency Housing, the number of beds are typically limited, therefore slots are most likely assigned to Clients at reservation rather than at check-in.

In the Usage menu, select Slot Inventory.



The screenshot shows a table titled "Resource Slots" under the "2nd Floor" category. The table has columns for Bed / Slot Description\*, Slot Type\*, Start Date, End Date, Category, Target Population, Status\*, and Availability. There are 12 rows listed, all of which are checked and have "Slot (HMIS Bed)" as the slot type, "Chronic Homeless" as the target population, and "Available" as the status. The availability is listed as "Year-round". The rows are numbered from 1 to 12. At the bottom right of the table, there are "Save" and "Cancel" buttons.

Bed / Slot Description*	Slot Type*	Start Date	End Date	Category	Target Population	Status*	Availability
✓ Single Bed A1	Slot (HMIS Bed)	2/1/2025	Open		Chronic Homeless	Available	Year-round
✓ Slot Auto - I0	Slot (HMIS Bed)	11/1/2022	Open		Chronic Homeless	Available	Year-round
✓ Slot Auto - I1	Slot (HMIS Bed)	11/1/2022	Open		Chronic Homeless	Available	Year-round
✓ Slot Auto - I2	Slot (HMIS Bed)	11/1/2022	Open		Chronic Homeless	Available	Year-round
✓ Slot Auto - 2	Slot (HMIS Bed)	11/1/2022	Open		Chronic Homeless	Available	Year-round
✓ Slot Auto - 3	Slot (HMIS Bed)	11/1/2022	Open		Chronic Homeless	Available	Year-round
✓ Slot Auto - 4	Slot (HMIS Bed)	11/1/2022	Open		Chronic Homeless	Available	Year-round
✓ Slot Auto - 5	Slot (HMIS Bed)	11/1/2022	Open		Chronic Homeless	Available	Year-round
✓ Slot Auto - 6	Slot (HMIS Bed)	11/1/2022	Open		Chronic Homeless	Available	Year-round
✓ Slot Auto - 7	Slot (HMIS Bed)	11/1/2022	Open		Chronic Homeless	Available	Year-round

Each automatically generated slot for this Usage displays, including the identifying description, type, availability, and status based on our selections.

Remember, these slots were automatically created because the Resource **Slot Setup Type** was set to “Slots Created During Setup”.

The MANAGE CATEGORIES button at the top can be used to create categories to be assigned for each slot. These are used for sorting and reporting purposes and do not affect functionality.

You can also use ADD ROW to add a new slot.

Since we have a list of automated slots, instead of adding a new record, we will focus on editing one of the existing slots.

Bed / Slot Description *	Slot Type *	Start Date	End Date	Category	Target Population	Status *	Availability
Row 1, Bed 1	Slot (HMIS Bed) ▾	02/01/2025	<input type="button" value="Open"/>	<input checked="" type="checkbox"/> Open Room	Chronic Homeless ▾	Available ▾	Year-round
<input checked="" type="checkbox"/> CA Bed <input type="checkbox"/> City Ogden State UT Address1 850 North Street <input type="button" value="Q"/> Locker <input type="button" value="Q"/> Is Accessible? <input type="checkbox"/> Has Electric Outlet? <input type="checkbox"/> Parking Row A, Space 1 <input type="button" value="Q"/> Rent Amount * 0.00 Sort Order							

Select the first record.

The **Bed/Slot Description** is the identifier used to differentiate the slot from other slots.

**Slot Type** can be changed to better describe the slot if necessary. Examples are “Single Bed”, “House”, and “Apartment”.

**Start Date** and **End Date** identify when the slot is available. The dates can be updated, as necessary. Use the star icon to indicate if the end date should remain “Open”.

**Category** is a multi-select that can be assigned to the slot for filtering forms and reports. The items available here are added through MANAGE CATEGORIES.

**Target Population** defaults to what was selected during Usage setup and identifies if the slot is reserved for certain populations. It can be changed here if needed.

**Status** identifies if the slot is assigned, available, in development, or under repair. The slot is set to “Available” by default but can be changed as needed.

**Availability** is used to identify if the slot is open all year, is just used for overflow, or is offered seasonally. It is set to “Year-round” by default but can be changed.

**CA Bed** means the bed is part of a Coordinated Entry system, which allows other Providers in the community to reserve a Client for this specific bed.

Address information can be used to identify where the slot is located. Use the lookup icon to search for properties related to the Provider, which are configured on the *Property* form off the Provider’s menu.

Only properties associated with the User's selected Provider are displayed. The selected Provider can be changed in the User's Corner.

If this slot has a locker or a parking space, use the lookup icons for each to search for availability and assign as needed. A specific locker or parking space can also be assigned at the time of reservation or check-in.

**Is Accessible?** and **Has Electric Outlet?** indicate if the slot is handicap accessible and if it has an electrical outlet available.

**Rent Amount** is used to note the rental cost for the slot. The amount can be zero dollars but is required.

**Sort Order** determines how the slot appears on forms in relation to the other slots. This field is not required.

	Bed / Slot Description *	Slot Type *	Start Date	End Date	Category	Target Population	Status *	Availability
✓	Bunk Bed A1	Bunk Bed	11/20/2022	12/31/2022		Chronic Homeless	Available	Year-round
✓	Single Bed A1	Single Bed (HMIS Bed)	11/1/2022	Open		Chronic Homeless	Available	Year-round
✓	Single Bed A10	Single Bed (HMIS Bed)	11/1/2022	Open		Chronic Homeless	Available	Year-round
✓	Single Bed A2	Single Bed (HMIS Bed)	11/1/2022	Open		Chronic Homeless	Available	Year-round
✓	Single Bed A3	Single Bed (HMIS Bed)	11/1/2022	Open		Chronic Homeless	Available	Year-round
✓	Single Bed A4	Single Bed (HMIS Bed)	11/1/2022	Open		Chronic Homeless	Available	Year-round
✓	Single Bed A5	Single Bed (HMIS Bed)	11/1/2022	Open		Chronic Homeless	Available	Year-round
✓	Single Bed A6	Single Bed (HMIS Bed)	11/1/2022	Open		Chronic Homeless	Available	Year-round
✓	Single Bed A7	Single Bed (HMIS Bed)	11/1/2022	Open		Chronic Homeless	Available	Year-round
✓	Single Bed A8	Single Bed (HMIS Bed)	11/1/2022	Open		Chronic Homeless	Available	Year-round

When all slots are configured appropriately, SAVE the form.

## Edit

Let us open the Usage menu again and review the other options available, starting at the top.

The screenshot shows the 'Resource Usage' page. On the left, a sidebar menu is open, displaying various options under 'Totals'. The 'Edit' option is highlighted with a blue border. The main content area shows a table with two rows of data. The columns are labeled: Attendance Service, Program Name, Start - End Date, Enrollment Type, Capacity, Enrolled Today, and Usage ID. The first row has values: Housing Placement, Emergency Housing, 11/1/2022 - 11/30/2022, Required/Auto Enrollment, 10, 4, 6554. The second row has values: Emergency Housing, 11/1/2022 - 11/30/2022, Required/Auto Enrollment, 12, 4, 6556. At the bottom right of the table, there is a 'Results Per Page' dropdown set to 50.

Use Edit to change details about the initial Usage setup, including the name, effective dates, and capacity.

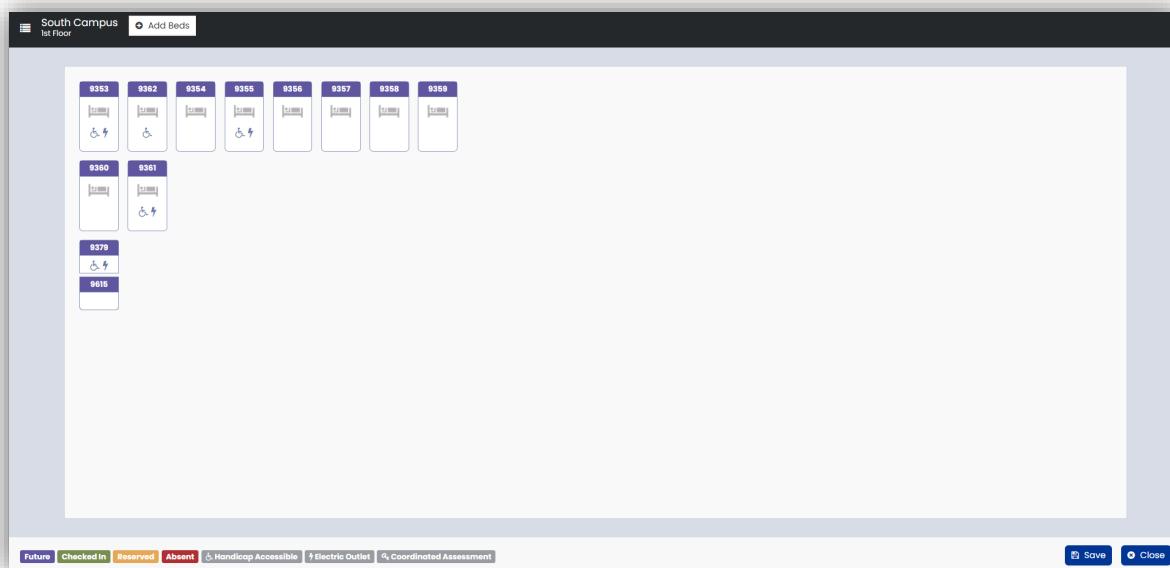
## HMIS SETUP

HMIS Setup also allows you to edit the initial Usage setup, but it is specific to HMIS functionality, which includes additional options, and displays individual slot details.

The screenshot shows the 'Edit Resource Usage' form. In the 'Usage Dates' section, there are fields for 'Start Date' and 'End Date', both represented by date pickers. Below these is a blue button labeled 'Usage Inventory Dates'. In the 'Allowable Clients and Accessibility' section, there are several checkboxes and dropdown menus. Under 'Allowable Clients', there are checkboxes for 'Allow Females (Age 18+)' (checked), 'Allow Males (Age 18+)' (unchecked), 'Allow Children' (checked), and 'Handicap Accessible' (checked). There is also a dropdown menu for 'Allow Children Age' with the value 'Younger than 18'. At the bottom right of the form are 'Save' and 'Cancel' buttons.

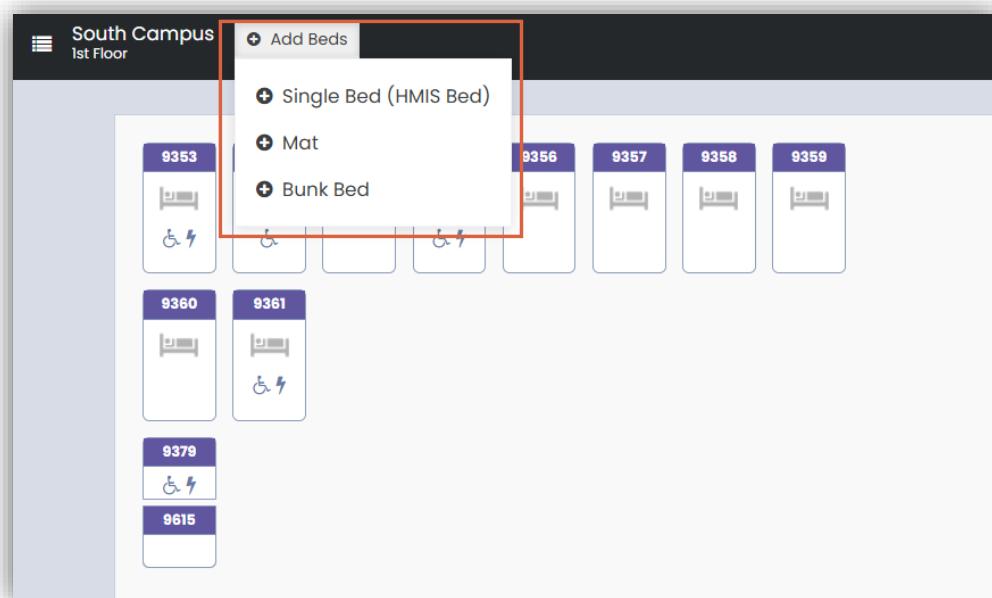
## Room Designer

Like Slot Inventory, the Room Designer can also be used to set up Usage slots. But, instead of a list of slots, the designer is a graphical representation of the slots available.

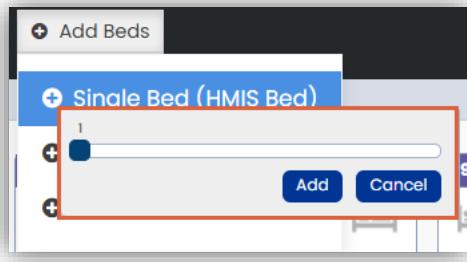


The slots displayed here were automatically generated based on the Usage capacity entered during setup.

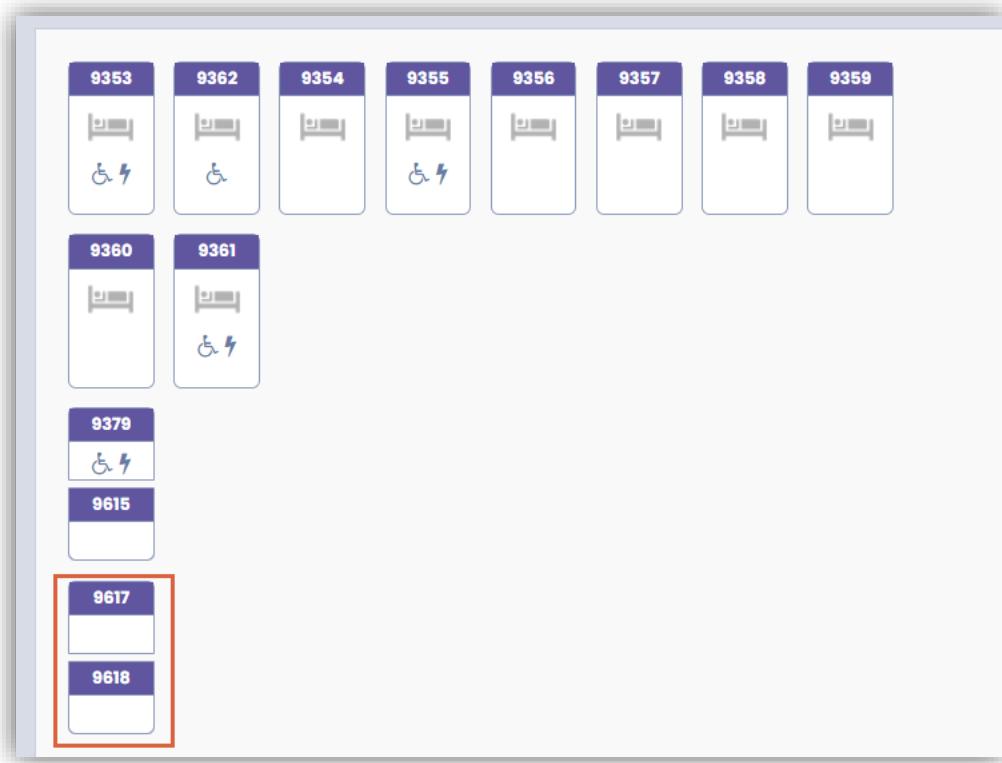
Use ADD BEDS to add slots within the Room Designer, including single beds, mats, or bunk beds.



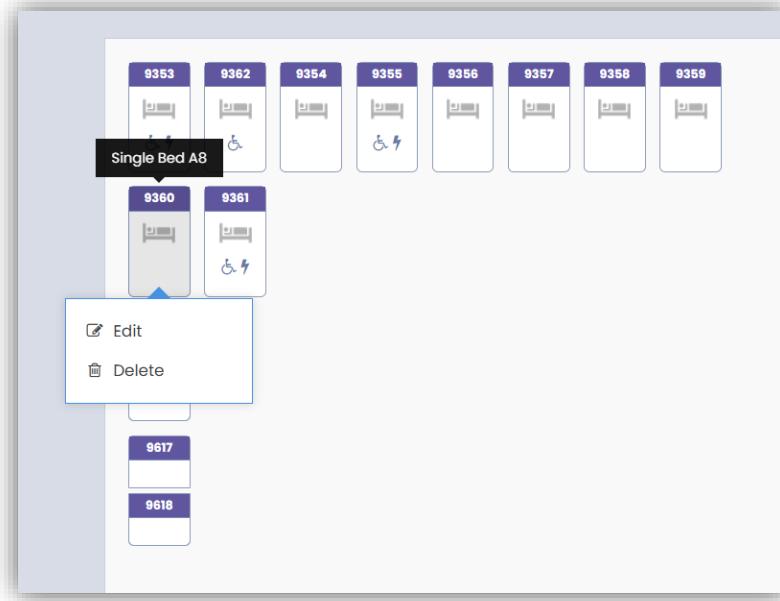
When you select the bed option, you are then prompted to select how many beds to add. Use the slider, and then select ADD.



The Room Designer then updates to reflect the initial inventory plus the newly added slot. The bunk bed option creates two slots that will appear together.



Select any slot to reveal its menu. Choose Delete to delete the slot or select Edit to update its details.



In the *Edit* window, you can update the slot's availability, name, status, accessibility, and more.

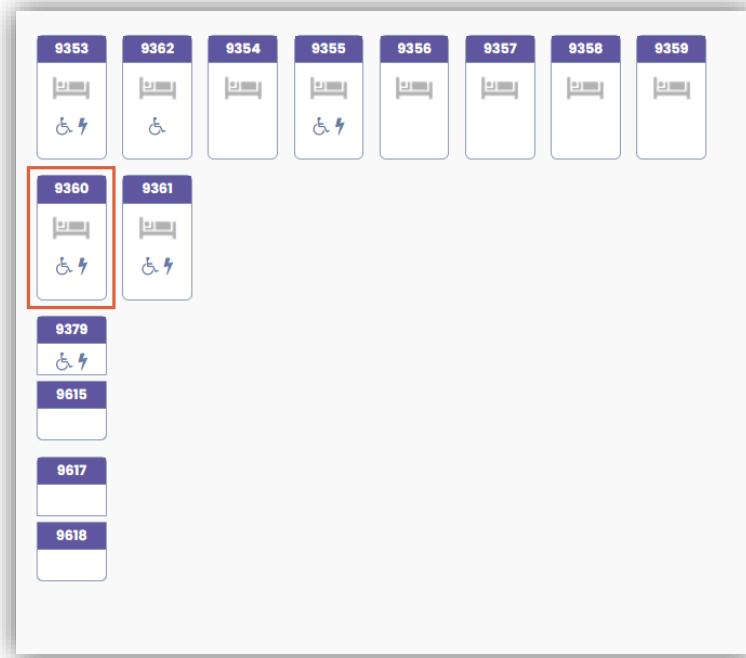
**Edit**

Edit slot

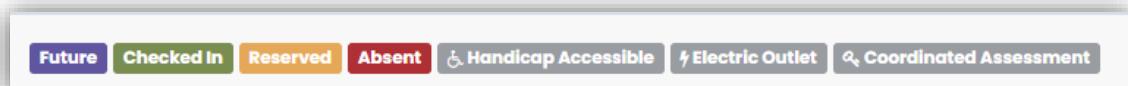
PAGE OPTIONS

Slot ID (5 Characters)	9360
Start Date	02/01/2025
Slot Name *	Single Bed A8
Availability	Year-round
Status *	Available
Target Population	Chronic Homeless
HMIS Participating Bed *	Yes
Randomizer Type	
Year-round	
<input checked="" type="checkbox"/> Electrical Outlet / Handicap Accessible - Select to indicate the visual cue in the bed management system.	
Electrical Outlet Available?	<input checked="" type="checkbox"/>
Handicap Accessible?	<input checked="" type="checkbox"/>
CA Bed	<input type="checkbox"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

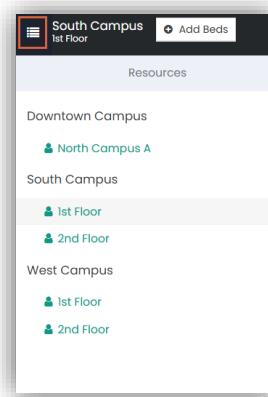
Notice now, slot 9360 now displays icons indicating it is handicap accessible and has an electrical outlet.



There is also a legend at the bottom of the Room Designer that helps you identify which slot has a particular feature. The status of the slot applies in case management.



The View Resources menu in the top left corner allows you to quickly access the Room Designer for the Provider's other Resources.



Select SAVE to record the slot inventory changes.

## HMIS Slot Inventory

Back on the Usage menu, HMIS Slot Inventory is a combination of the Usage details and Slot Inventory and is helpful with HMIS functionality.

The screenshot shows the 'Filters' section with dropdowns for 'Resource Usage Inventory' (set to 'Beds') and various numerical inputs for bed counts. Below the filters is a table titled 'Total Rows: 11' with columns: Bed / Slot Description\*, Slot Type\*, Start Date, End Date, Category, Target Population, Status\*, and Availability. The table lists five rows of bed slots, all marked as 'Available' and 'Year-round'. At the bottom right are 'Save' and 'Cancel' buttons.

Bed / Slot Description*	Slot Type*	Start Date	End Date	Category	Target Population	Status*	Availability
Bunk Bed A1	Bunk Bed	11/20/2022	12/31/2022		Chronic Homeless	Available	Year-round
Single Bed A1	Single Bed (HMIS Bed)	11/1/2022	Open		Chronic Homeless	Available	Year-round
Single Bed A10	Single Bed (HMIS Bed)	11/1/2022	Open		Chronic Homeless	Available	Year-round
Single Bed A2	Single Bed (HMIS Bed)	11/1/2022	Open		Chronic Homeless	Available	Year-round
Single Bed A3	Single Bed (HMIS Bed)	11/1/2022	Open		Chronic Homeless	Available	Year-round

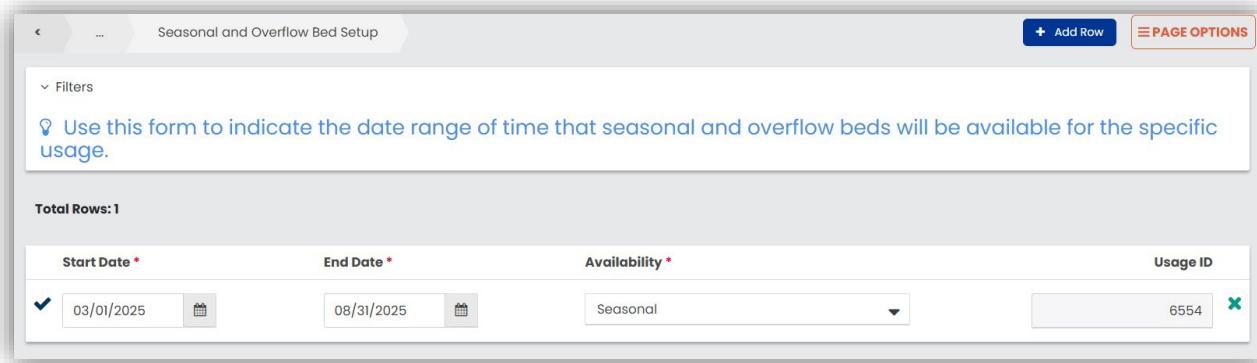
## Short Edit

Short Edit allows for quickly editing key details about the Usage, including the Usage name, category, dates, allowable Clients, accessibility, and recurrence.

The screenshot shows the 'Add Resource Usage Event' form. It includes fields for 'Event Name\*' (1st Floor), 'Categories' (Transitional Housing), 'Start Date\*' (11/01/2022) and 'End Date\*' (11/30/2022). Below these are sections for 'Allowable Clients and Accessibility' with checkboxes for gender, age, and handicap status. At the bottom are 'Save' and 'Cancel' buttons.

## Seasonal Beds

Seasonal Beds allows you to add a date range that seasonal and overflow beds are available for the specific Usage.



The screenshot shows a table with one row of data. The columns are labeled 'Start Date \*', 'End Date \*', 'Availability \*', and 'Usage ID'. The 'Start Date' is 03/01/2025, the 'End Date' is 08/31/2025, the 'Availability' is 'Seasonal', and the 'Usage ID' is 6554. There is a green checkmark icon next to the start date field.

Start Date *	End Date *	Availability *	Usage ID
03/01/2025	08/31/2025	Seasonal	6554

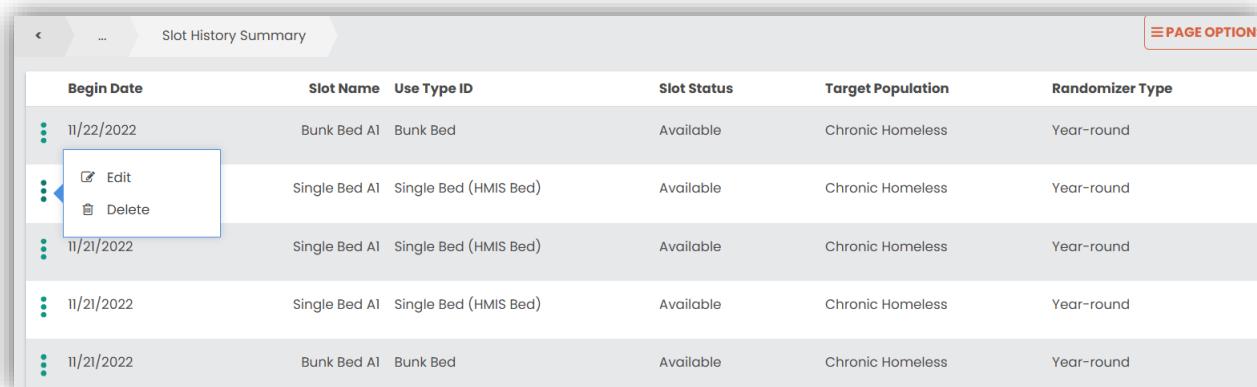
For example, if there is an extra bed available during the spring and summer months to accommodate an additional Client. This bed might only be available from March 1<sup>st</sup> through August 31<sup>st</sup>.

Select a record to make changes or use the X to delete.

Click SAVE when done.

## Slot History

Slot History displays a summary of changes that have been made to the slots for this Usage.



The screenshot shows a table of slot history. The columns are 'Begin Date', 'Slot Name', 'Use Type ID', 'Slot Status', 'Target Population', and 'Randomizer Type'. There are six rows of data. The first row's 'Begin Date' is 11/22/2022, 'Slot Name' is 'Bunk Bed A1', 'Use Type ID' is 'Bunk Bed', 'Slot Status' is 'Available', 'Target Population' is 'Chronic Homeless', and 'Randomizer Type' is 'Year-round'. A context menu is open over this row, showing options 'Edit' and 'Delete'.

Begin Date	Slot Name	Use Type ID	Slot Status	Target Population	Randomizer Type
11/22/2022	Bunk Bed A1	Bunk Bed	Available	Chronic Homeless	Year-round
11/21/2022	Single Bed A1	Single Bed (HMIS Bed)	Available	Chronic Homeless	Year-round
11/21/2022	Single Bed A1	Single Bed (HMIS Bed)	Available	Chronic Homeless	Year-round
11/21/2022	Single Bed A1	Single Bed (HMIS Bed)	Available	Chronic Homeless	Year-round
11/21/2022	Bunk Bed A1	Bunk Bed	Available	Chronic Homeless	Year-round

The details for each slot are displayed, and each slot can be edited or deleted from its menu as needed.

## Delete Usage

Delete Usage removes the Usage from the Resource. If the Usage has already been reserved or checked into, the Delete option is no longer available on the menu.

## Edit Multi-Service Quantity

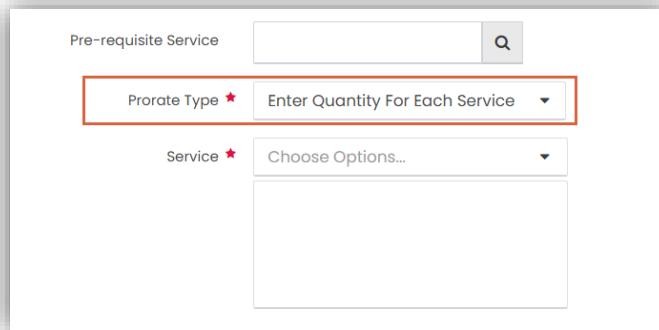
Edit Multi-Service Quantity is used to edit aspects of the services to be posted for the Usage.



Service Type	Units	Service Total	UsageID	ID
Bus Tokens	0.50	0.5	6556	1071
Case Management	0.50	0.5	6556	1072

The services that were assigned during setup for this Usage are displayed, including the description and the number of units that are posted.

This is especially beneficial if this Resource was set up to post multiple services. And, if a **Prorate Type** was set when configuring the Resource, the number of **Units** to be posted for each service for this Usage can be updated on this form.



Select a record to change the number of service **Units** that will be recorded for the Client. Or use the X to delete the service. If deleted, the service will no longer be posted to the Client's record for this Resource Usage. It will still remain on the other Usages for this Resource.

It is important to note that new services cannot be added here. Additional services must be added using the *Edit Resource Usage* form.

# Housing Emergency Case Management

Now that the "Housing Emergency" Resource and its Usages are set up, the next step is to focus on the Case Management side.

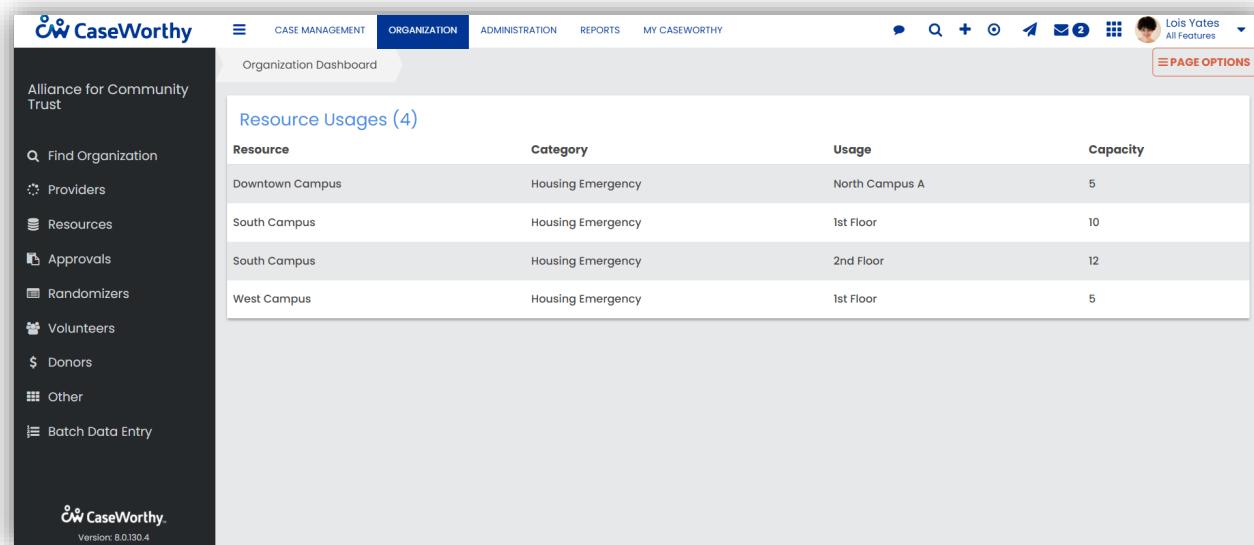
Housing Emergency reservations can ONLY be made on the Organization tab. Before getting started, ensure the correct Organization is loaded in the Entity Corner to maintain accurate records.

## Resource Usages

**Navigation** Organization tab: Organization Dashboard

The *Organization Dashboard* displays as the default landing page when you access the Organization tab.

The *Resource Usages* query widget is displayed and lists all active Resources for the selected Organization. Each **Resource** includes its name, Resource **Category**, the **Usage** name, and its maximum capacity.



The screenshot shows the CaseWorthy Organization Dashboard. The left sidebar contains navigation links for Find Organization, Providers, Resources, Approvals, Randomizers, Volunteers, Donors, Other, and Batch Data Entry. The main content area has tabs for CASE MANAGEMENT, ORGANIZATION (which is selected), ADMINISTRATION, REPORTS, and MY CASEWORTHY. The Organization Dashboard title is at the top. Below it is a 'Resource Usages (4)' section with a table:

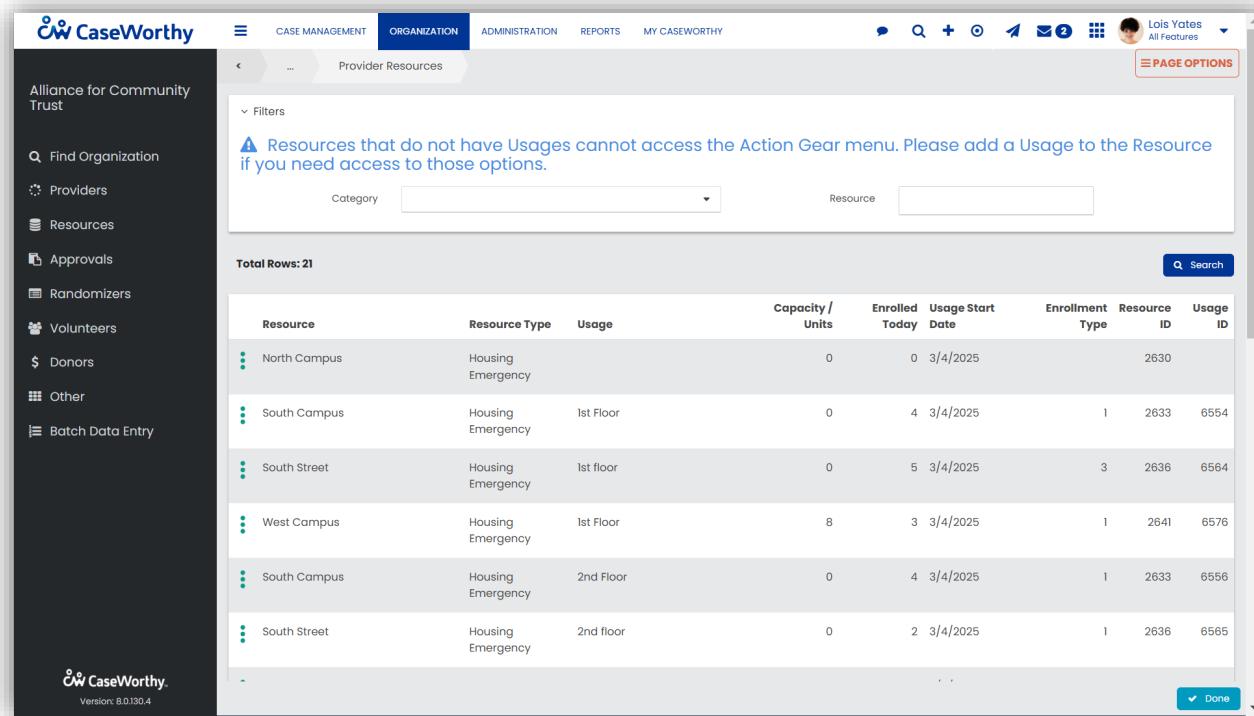
Resource	Category	Usage	Capacity
Downtown Campus	Housing Emergency	North Campus A	5
South Campus	Housing Emergency	1st Floor	10
South Campus	Housing Emergency	2nd Floor	12
West Campus	Housing Emergency	1st Floor	5

Notice the Resource we created in our example now includes a second Usage called “2<sup>nd</sup> Floor”. The second Usage is for the second floor, allows men, and only provides for a single service.

Also notice how the Resource is listed twice in the grid because it has two Usages. There is one row for each Usage; “1<sup>st</sup> Floor” and “2<sup>nd</sup> Floor”.

# Provider Resources Form

Select the widget to open the *Provider Resources* form.



Resource	Resource Type	Usage	Capacity / Units	Enrolled Today	Usage Start Date	Enrollment Type	Resource ID	Usage ID
North Campus	Housing Emergency		0	0	3/4/2025		2630	
South Campus	Housing Emergency	Ist Floor	0	4	3/4/2025	1	2633	6554
South Street	Housing Emergency	Ist floor	0	5	3/4/2025	3	2636	6564
West Campus	Housing Emergency	Ist Floor	8	3	3/4/2025	1	2641	6576
South Campus	Housing Emergency	2nd Floor	0	4	3/4/2025	1	2633	6556
South Street	Housing Emergency	2nd floor	0	2	3/4/2025	1	2636	6565

All Resources for the Organization then display, including the **Resource name, Resource Type, Usage**, capacity, and number enrolled.

Notice, if one Resource has multiple Usages, they each display on the form individually.

## Single Service Usage

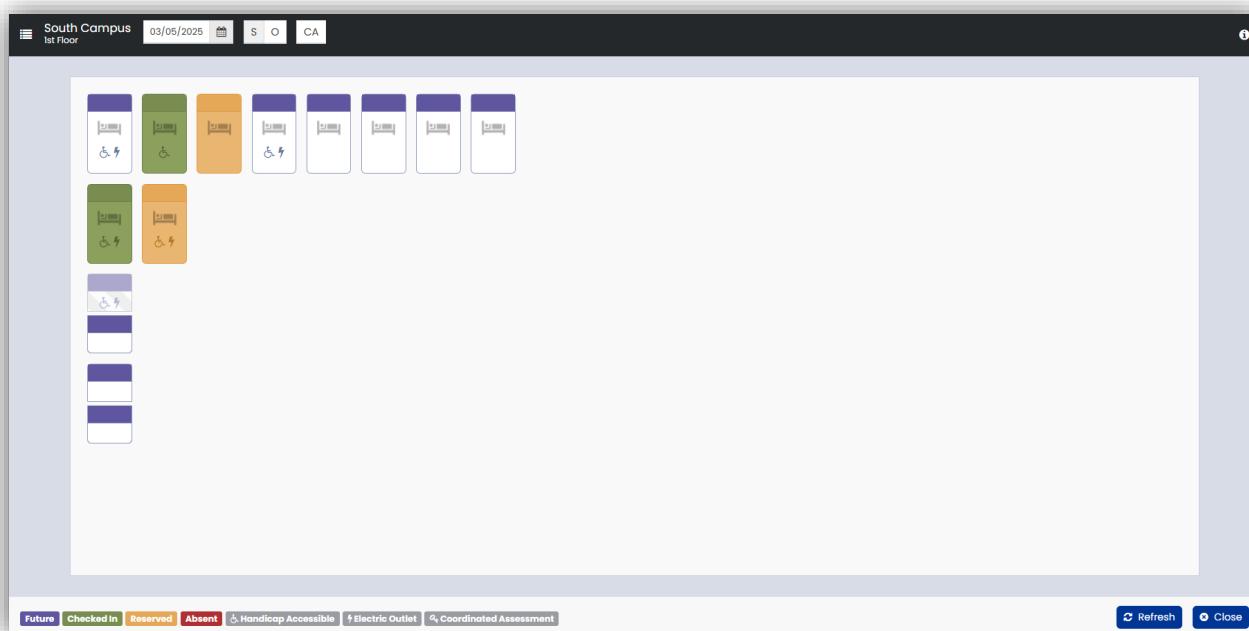
The options available on the Usage menu will vary based on the number of services the Usage is set to track. A Usage can be configured to record a single service or multiple services.

Let us start by reviewing a Usage that records a single service.

### Slot Check In Manager

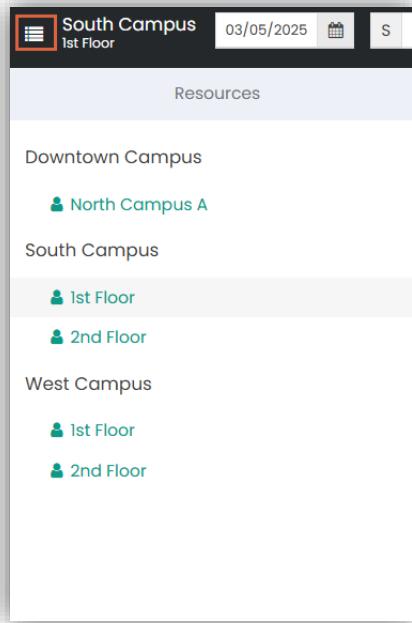
Off the Usage menu, select Slot Check In Manager.

This is the graphical representation of this Resource Usage's layout, or the room of beds, which is used for Housing Emergency. It displays all slots that are available for the Resource.

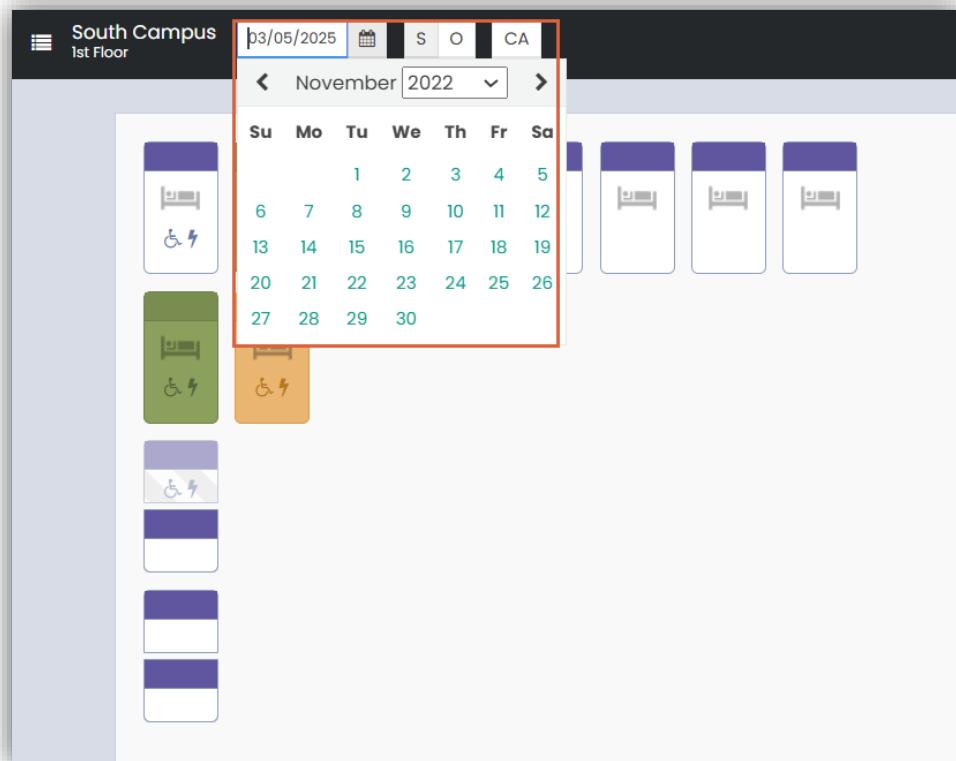


At the top, there are multiple options available.

The View Resources menu in the top left corner allows you to quickly access the Slot Room Manager for the Organization's other Resources.



You can also change the date to update the slot availability based on the date selected.

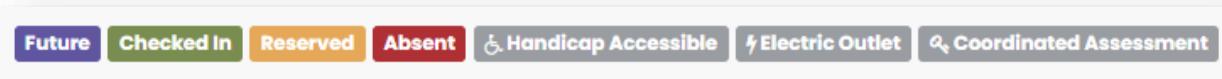


The three buttons at the top display or hide specific bed types.



- Select the “S” icon to only show seasonal beds.
- Select the “O” icon to only show overflow availability.
- Select “CA” to only show Coordinated Assessment beds.

The legend at the bottom details the icons and color meanings.



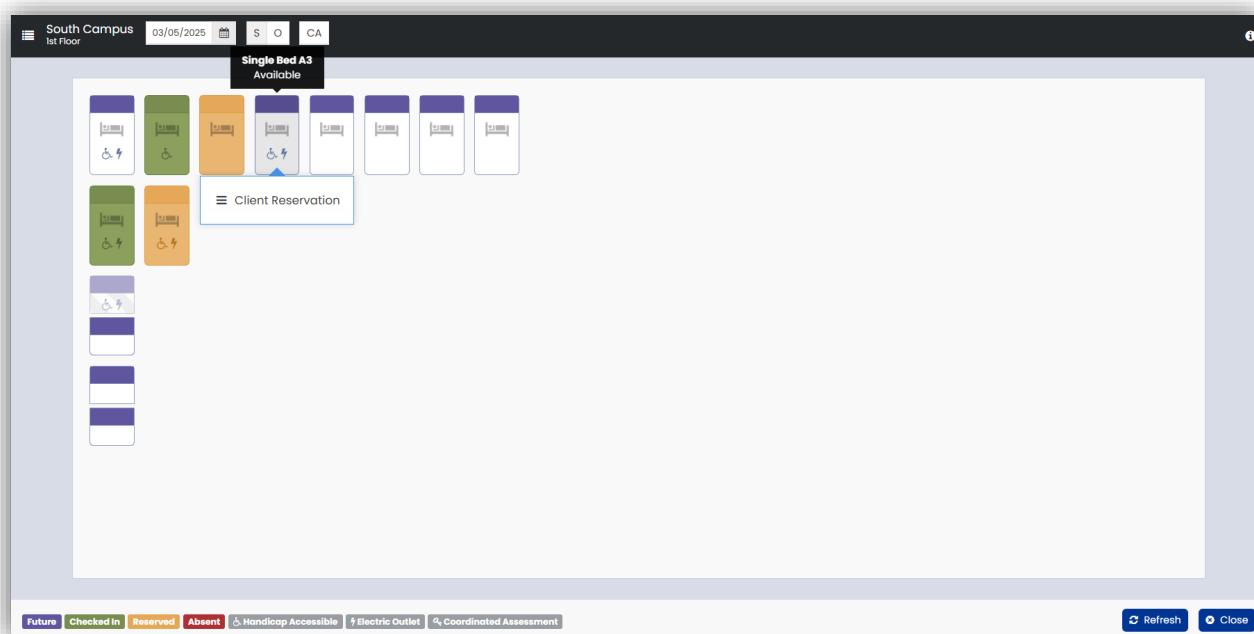
Slots that are reserved are highlighted in yellow.

Slots that are checked into are highlighted in green.

Slots that are available are highlighted with purple.

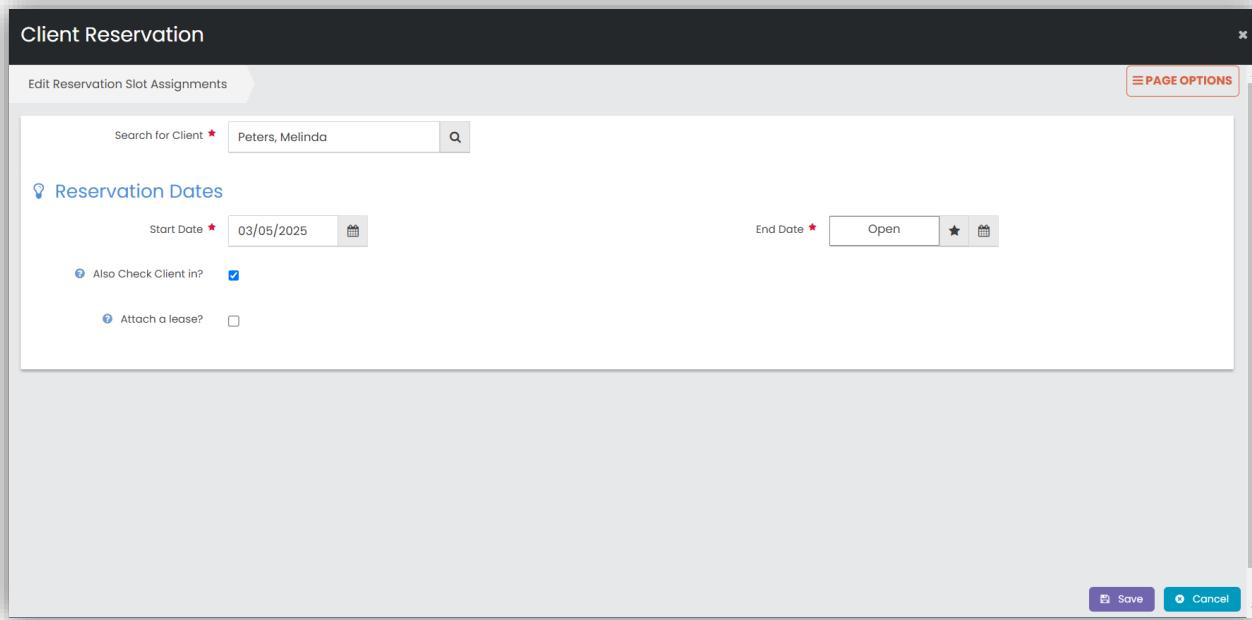
Also, notice that slots that are handicapped accessible or have an electrical outlet display images representing these features.

To add a reservation, click on an available slot and select Client Reservation.



The *Client Reservation* window is displayed.

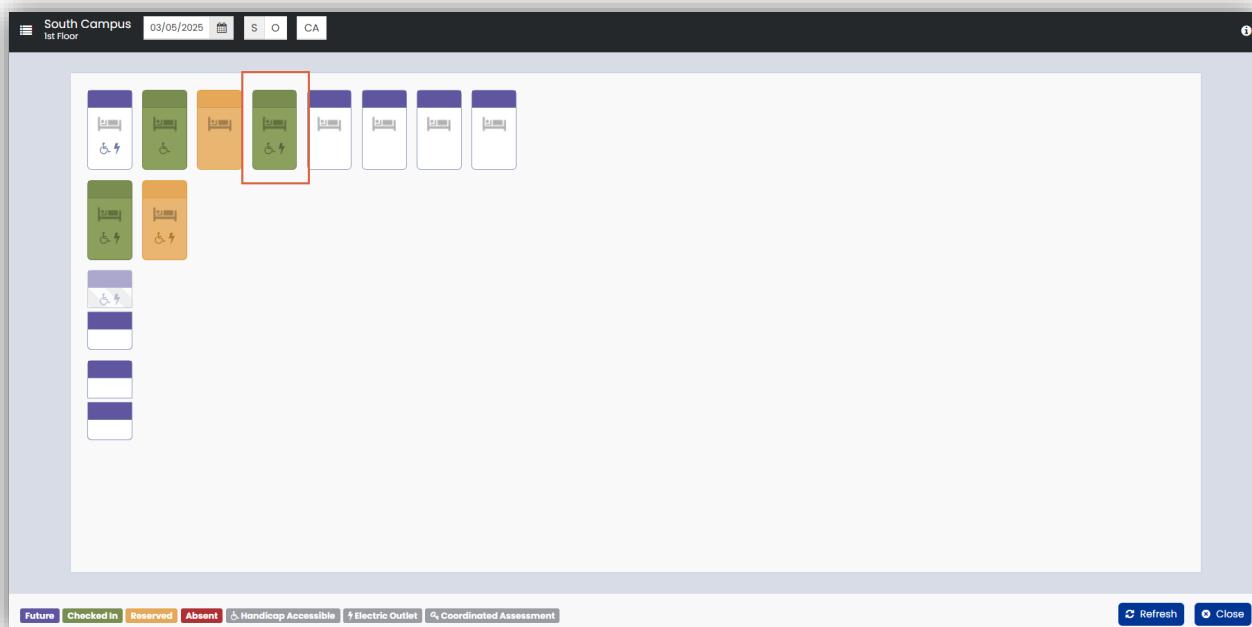
Click the lookup icon to search for a Client.



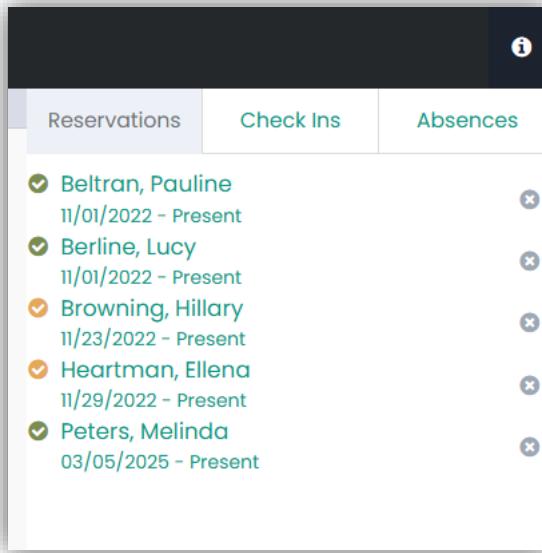
Enter the reservation dates, select to check the Client in, and attach a lease agreement if necessary.

SAVE the new reservation.

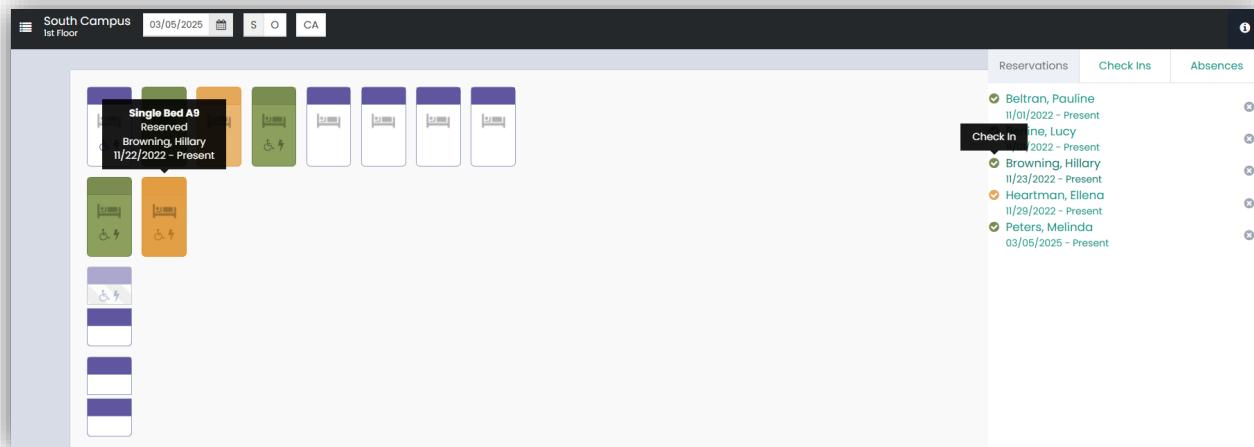
The slot turns green to indicate a Client is reserved and checked in.



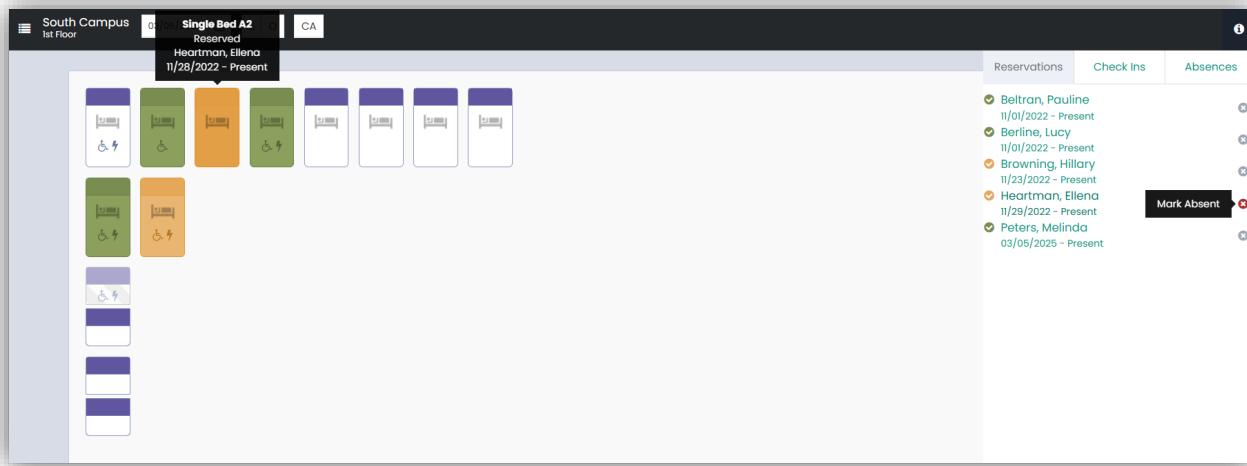
Use the information icon in the top right corner to open an additional window. There are three tabs that provide details about Clients and their reservation status.



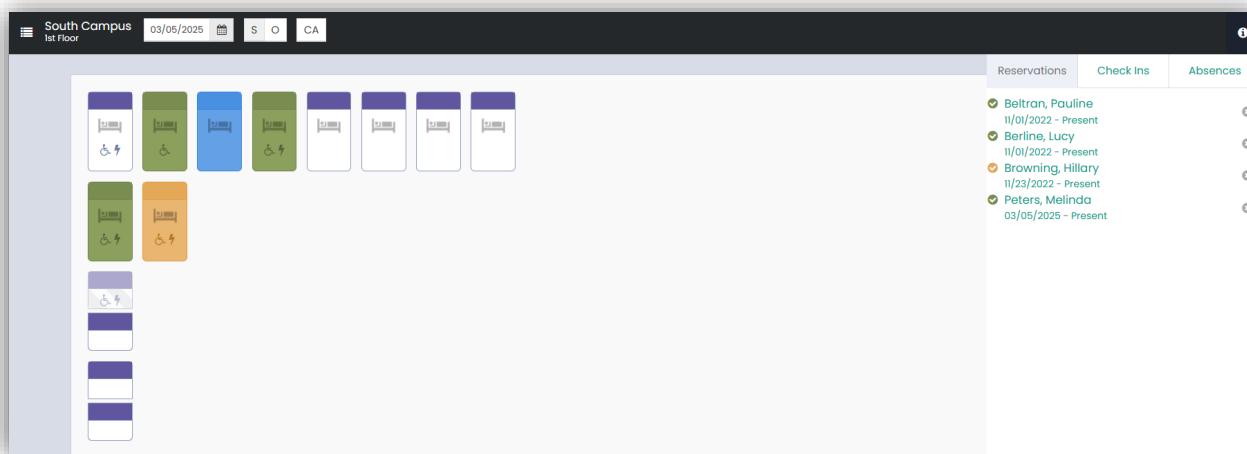
Clients with a reservation are listed on the Reservations tab. Select the checkmark to the left of the Client name to quickly check them into the Usage.



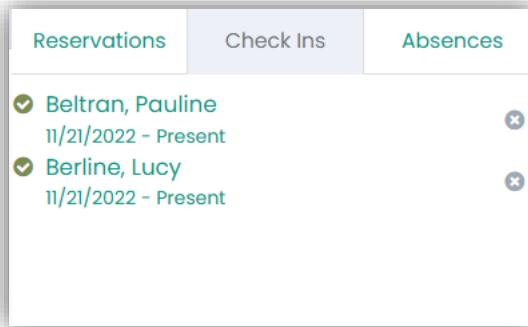
Or select the “X” to the right of the Client name to mark the Client as absent.



While the Client was marked absent for today, their slot is still held and reserved for the rest of their reservation. That is why it displays highlighted in blue, which represents a future reservation.



The next tab is Check Ins which displays Client who have checked in for the selected date.

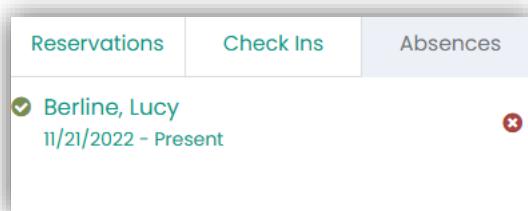


Select the “X” to the right of the Client name to mark the Client as absent. Since the Client is checked in and is marked absent, their slot is highlighted in red to indicate an absence for the selected date.



The screenshot shows a software interface for managing room occupancy. At the top, it displays "South Campus 1st Floor" and the date "03/06/2025". Below this is a grid of room icons. Some rooms are colored (purple, green, orange, red, yellow) while others are white. Red icons with a person symbol and a slash through it are placed over specific rooms, indicating absence. To the right of the grid, there's a sidebar with tabs for "Reservations", "Check Ins", and "Absences". Under "Absences", the same two clients are listed as present. At the bottom, there are navigation buttons for "Future", "Checked In", "Reserved", "Absent", "Handicap Accessible", "Electric Outlet", and "Coordinated Assessment", along with "Refresh" and "Close" buttons.

The Absences tab displays those who have been marked absent for the date.



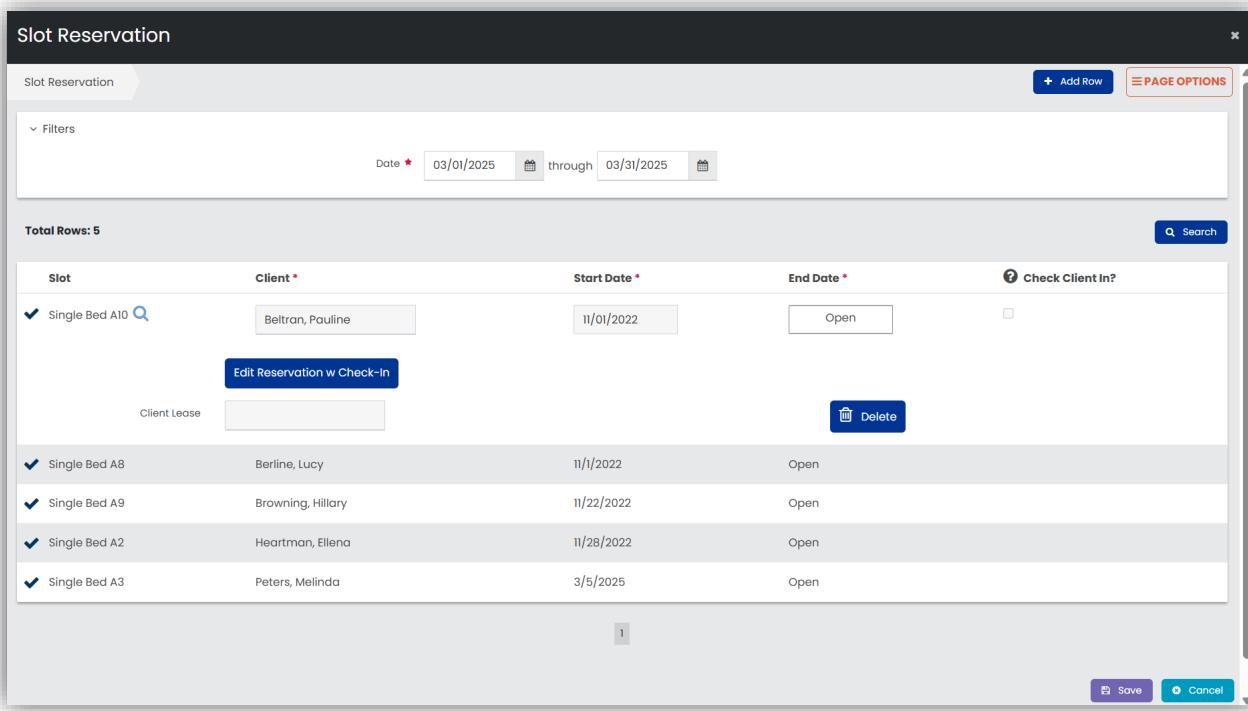
The Slot Check In Manager automatically updates based on your selections. The slots are highlighted with colors from the legend; green for reserved, red for absent, etc.

Select REFRESH to update the Usage layout or click CLOSE when done.

## Slot Reservation

The next Usage menu item is Slot Reservation. Like the Slot Check In Manager, this form also allows you to add new reservations and check ins, as well as update existing reservations.

The two options offer the same functionality, but the Slot Check In Manager is a graphical representation and Slot Reservation is a list of slots. You can choose which option you prefer to use.



The screenshot shows the 'Slot Reservation' form. At the top, there is a header bar with a search bar and a date range selector (Date: 03/01/2025 through 03/31/2025). Below the header, a message says 'Total Rows: 5'. The main area contains a table with columns: Slot, Client, Start Date, End Date, and a 'Check Client In?' checkbox. The table lists five rows of data:

Slot	Client *	Start Date *	End Date *	Check Client In?
Single Bed A10	Beltran, Pauline	11/01/2022	Open	<input type="checkbox"/>
Single Bed A8	Berline, Lucy	11/1/2022	Open	<input type="checkbox"/>
Single Bed A9	Browning, Hillary	11/22/2022	Open	<input type="checkbox"/>
Single Bed A2	Heartman, Ellena	11/28/2022	Open	<input type="checkbox"/>
Single Bed A3	Peters, Melinda	3/5/2025	Open	<input type="checkbox"/>

Below the table, there is a 'Client Lease' section with a 'Delete' button. At the bottom of the form are 'Save' and 'Cancel' buttons.

At the top of the form, the dates default to the current month. To view current reservations for the Usage, select the appropriate date range and click SEARCH.

Each reservation displays the slot name that is reserved, the Client's name, the dates of the reservation, as well as the option to check the Client in, if they are not checked in already.

Select ADD ROW to create a new reservation.

The **Slot** automatically defaults to the first available slot in the inventory.

Click the lookup icon to select a different slot if needed.

The screenshot shows a reservation management interface. At the top, there are fields for 'Slot' (dropdown menu showing 'Bunk Bed - N/A - Open'), 'Client' (text input), 'Start Date' (date input set to 03/06/2025), 'End Date' (button set to 'Open'), and a checkbox for 'Check Client In?'. Below these are fields for 'Beltran, Pauline' (Client Name), '11/01/2022' (Check-In Date), and 'Open' (Status). A 'Delete' button is visible. At the bottom, there's a 'Client Lease' section and another 'Delete' button.

Then, click the lookup icon to search for the Client. You can search by last name, first name, birthdate, scan card ID, or Client ID.

The screenshot shows a search form titled 'Find Client with Reservation Information Lookup'. It includes a 'Find Client with Reservation Information' search bar, 'PAGE OPTIONS' button, and a 'Filters' section. The filters section contains fields for 'Last Name' (set to 'beltran'), 'First Name' (empty), 'Birth Date' (empty), 'Scan Card ID' (empty), and 'ClientID' (empty). A 'Search' button is at the bottom right.

The *Find Client with Reservation Information Lookup* form displays all Clients matching the search criteria within this Organization.

The list includes the Client name, if the Client already has a reservation, and if so, where, and when.

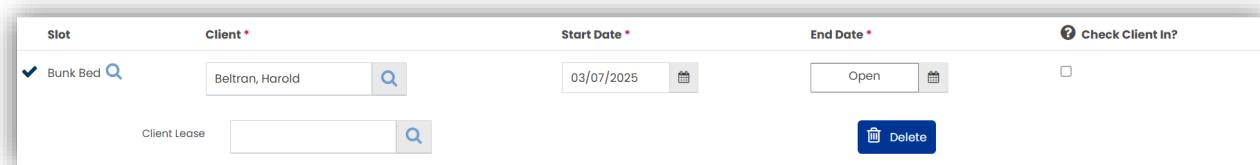
The screenshot shows the results of a search with 'Total Rows: 6'. The table has columns: Name, Current Reserved In, Start Date, Client Gender, End Date, Birth Date, ClientID, Family Name, Barred Program, Bar Enroll Service, Barred Service, and Resource ID. The data rows are:

Name	Current Reserved In	Start Date	Client Gender	End Date	Birth Date	ClientID	Family Name	Barred Program	Bar Enroll Service	Barred Service	Resource ID
Beltran, Harold			Man (Boy, if child)		10/10/2018	24497	Beltran,Joseph-2000-05-21				
Beltran, Harold			Man (Boy, if child)		10/10/2018	24497	Peters,Melinda-1977-05-21				
Beltran, Pauline	Ist Floor	11/1/2022	Woman (Girl, if child)	Open	8/1/2022	24498	Beltran,Joseph-2000-05-21				

The form also displays if a Client is barred from any programs or services.

Select the Client to add a reservation.

The *Slot Reservation* form displays with the **Client** field now populated.



The screenshot shows the 'Slot Reservation' form. The 'Slot' field contains 'Bunk Bed'. The 'Client' field is populated with 'Beltran, Harold' and has a search icon. The 'Start Date \*' field shows '03/07/2025' with a calendar icon. The 'End Date \*' field shows 'Open' with a calendar icon. A checkbox labeled 'Check Client In?' is checked. Below the main fields, there are sections for 'Client Lease' and 'Enrollment'. A 'Delete' button is located at the bottom right.

The **Start** and **End Date** capture the length of the reservation. If the Usage were set up to automatically perform check-ins, it would do so during this date range.

Select **Check Client In** to automatically check the Client in now or leave it blank to check them in later.

**Client Lease** information can be added here as well, which are assessments that are presented for leased properties.

An **Enrollment** field may also be displayed depending on the Usage's configuration.

- The **Enrollment** dropdown will appear when the **Enrollment Type** is either “Enter Enrollment” or “Enter Enrollment Optional” are selected.
- The dropdown does not appear when “Required/Auto Enrollment” or “No Action Required” are selected.

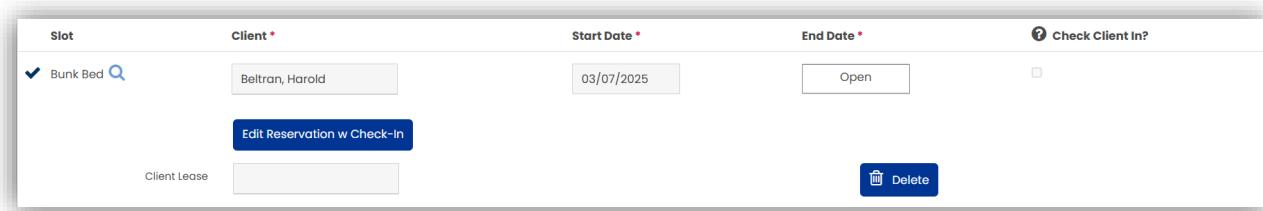
When entering reservations, the system will validate if the Client is allowed access to the Usage based on the Client’s record and on the Usage’s configuration. If they are not allowed, a message will display explaining the reasoning that prevents the reservations from being completed.

An error will display in the following scenarios:

- If the Client is not enrolled in the required program and the Usage does not include automatic enrollments.
- If the Client’s profile does not match the Usage’s allowability.
- If the Client is already reserved elsewhere.

Continue to add reservations as needed and then **SAVE** the form.

Once the reservation is saved and the Client is checked in, you will also have the option to edit or delete the record.



The screenshot shows a software interface for managing reservations. At the top, there are fields for 'Slot' (Bunk Bed), 'Client' (Beltran, Harold), 'Start Date' (03/07/2025), and 'End Date' (03/07/2025). A button labeled 'Check Client In?' is present. Below these are buttons for 'Edit Reservation w/ Check-In' (highlighted in blue), 'Client Lease', and 'Delete'.

**EDIT RESERVATION W CHECK-IN** allows you to update the start and end date for the reservation.

**DELETE** allows you to permanently remove the reservation, and all associated services, from the system.

If you accidentally check a Client into their reservation, you can undo that check-in by deleting the attendance service which was recorded for them in the check-in process.

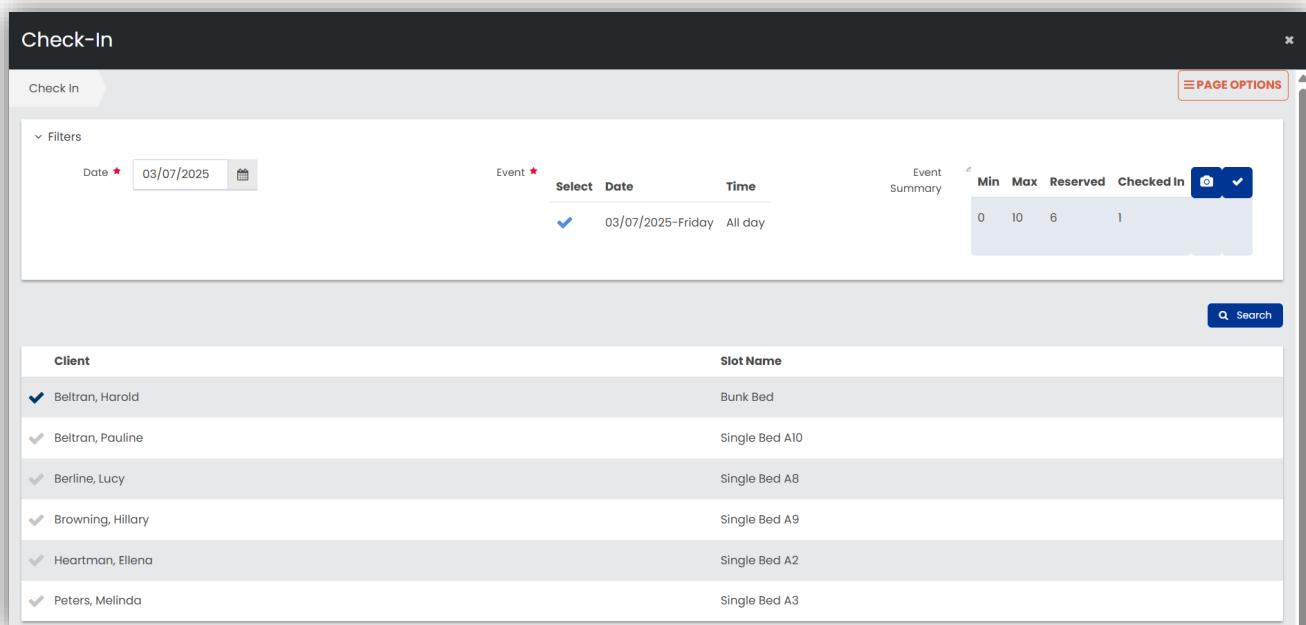
## Check-in

Back on the Resource menu, select Check-in.

The *Check-In* form allows you to view a list of all reserved Clients for a selected date.

The **Date** defaults to today's date but can be changed. Select SEARCH to display the list of reservations for the selected date.

The **Event** details are displayed for the chosen date, as well as an **Event Summary**, which includes Resource capacity information, how many Clients have a reservation, and how many Clients are already checked in.

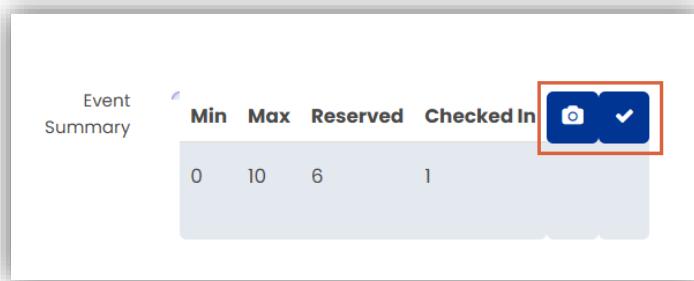


The screenshot shows the 'Check-In' form. At the top, there are filters for 'Date' (03/07/2025) and 'Event' (03/07/2025-Friday All day). The event summary shows 0 Min, 10 Max, 6 Reserved, and 1 Checked In. Below this is a table listing clients and their assigned slots:

Client	Slot Name
Beltran, Harold	Bunk Bed
Beltran, Pauline	Single Bed A10
Berline, Lucy	Single Bed A8
Browning, Hillary	Single Bed A9
Heartman, Ellena	Single Bed A2
Peters, Melinda	Single Bed A3

Each reservation includes the Client's name and **Slot Name**. Records that display a checkmark to the left of the Client's name are already checked in to the reservation.

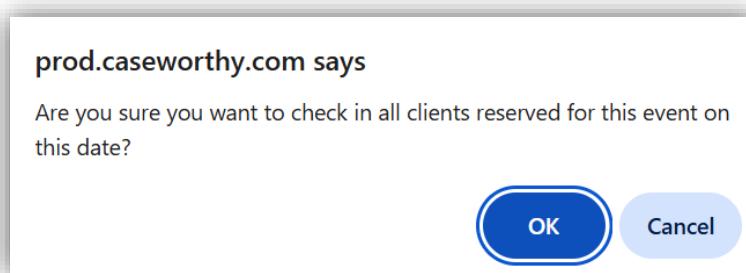
There are a couple of options for checking in any remaining reservations on this form.



In the top right corner, the camera icon can be used to check Client's in using scan cards. This will only work for single-service Usages.

Or use the checkmark icon in the top right corner to select all remaining reservations and check everyone in at one time.

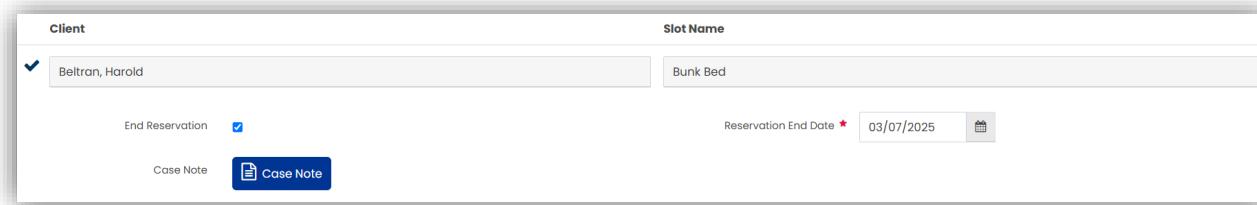
- A message displays prompting you to confirm the action.



Select OK. All Clients are then checked in, which is represented with a checkmark to the left of each Client's name.

Client	Slot Name
✓ Beltran, Harold	Bunk Bed
✓ Beltran, Pauline	Single Bed A10
✓ Berline, Lucy	Single Bed A8
✓ Browning, Hillary	Single Bed A9
✓ Heartman, Ellena	Single Bed A2
✓ Peters, Melinda	Single Bed A3

Select any reservation to view or edit the details.



The Client's name and **Slot Name** cannot be changed.

**End Reservation** is used to end the reservation for the selected date. This could, for example, be the last time the Client checks in because the reservation ends tomorrow. If you are ending a reservation, select the end date for the reservation.

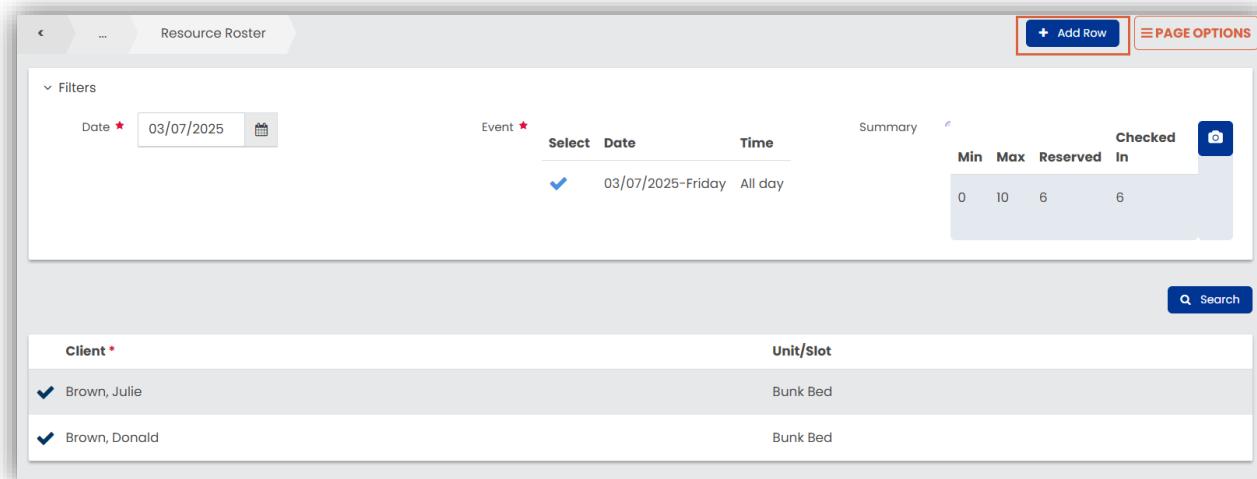
A CASE NOTE can be added to the reservation too.

When done, SAVE the form.

## Roster/Check in

Back on the Usage menu, Roster/Checkin allows you to add reservations and check Clients in by using scan card functionality. This form is like the Check-In menu option, but there are some notable differences.

- This form displays Clients with reservations that have not yet checked in.
- You can add new reservations on this form.
- You can check-in Clients with scan card functionality only.
- You can edit each reservation listed, including the Client's name and the slot.



Client *	Unit/Slot
Brown, Julie	Bunk Bed
Brown, Donald	Bunk Bed

Choose the appropriate date and select SEARCH.

Clients with reservations that have not yet checked in are displayed.

Use ADD ROW to record a new reservation.

The screenshot shows the CaseWorthy Resource Roster interface. At the top right, there is a blue button labeled '+ Add Row'. Below it, a search bar has '03/07/2025' selected. The main area displays a table with columns: Event, Select, Date, Time, Summary, Min, Max, Reserved, Checked In, and a camera icon. One row is visible with the date '03/07/2025-Friday All day'. Below this table is a section titled 'Client \*' containing a search input field with a magnifying glass icon and a dropdown menu showing three clients: 'Brown, Julie', 'Brown, Donald', and 'Flores, Sandra'. To the right of this is a 'Unit/Slot' column with the value 'Bunk Bed'. At the bottom right of the form are 'Save' and 'Cancel' buttons.

Click the lookup icon to search for and then select the Client.

The reservation is set to the next available slot by default.

Use the magnifying glass icon to select a different slot if needed.

This screenshot shows the same Resource Roster interface as above, but with a client selected in the dropdown. The 'Client \*' dropdown now shows 'Flores, Sandra' with a checkmark. A magnifying glass icon is to its right. To the right of the client list is an open dropdown menu titled 'Unit/Slot' with the option 'Bunk Bed' highlighted. The menu also lists other options: 'Bunk Bed - Open', 'Bunk Bed - Open', 'Bunk Bed - Open', 'Bunk Bed A1 - Open', 'Single Bed A1 - Open', 'Single Bed A10 - Open', and 'Single Bed A2 - Open'. At the bottom right of the form are 'Save' and 'Cancel' buttons.

You can continue to edit each reservation on this form until the Client is checked in.

Once a Client is checked in to the reservation, they will no longer display on this form.

When done, SAVE the form.

## Wait List

A Wait List can be used to maintain a register of Clients waiting for a reservation.

This list displays all Clients waiting for a reservation and can be accessed at any time.

Created Date	Effective Date	Client Name	Restriction
3/7/2025	3/7/2025	Peters, Joshua	Shared

For example, if all beds are reserved for the month of December and you would like to maintain a record of Clients that would like to take over the reservation if one becomes available. This is used for reference purposes only and does not work with other functionality.

Use ADD NEW to include a Client on the waitlist.

Enter the appropriate details, including the date of the request and the Client's name.

Select SAVE when done.

Enter Resource Wait List

Wait List Date *	03/07/2025	Effective Date
Client Last Name *	Brown	Client First Name
Gender		Birth Date
Restriction Information		
Restriction *	Shared	Save
Cancel		

From the record's menu, select Edit to update the details of the request, or use Delete to remove the Client from the waiting list.

Usage Wait List			
Created Date	Effective Date	Client Name	Restriction
3/7/2025	3/7/2025	Peters, Joshua	Shared
	3/7/2025	Brown, Leona	Shared
Results Per Page: 50			

## Resource Log

The next option on the Usage menu is Resource Log.

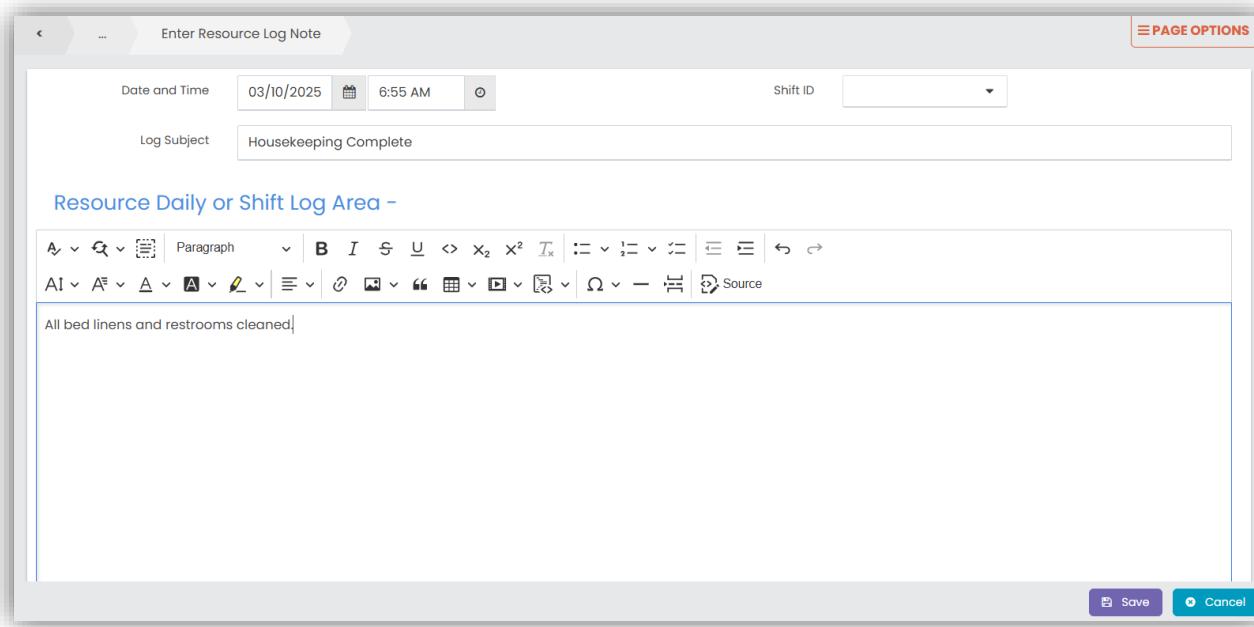
Resource Log			
Total Rows: 1	Date & Time	User	Note Subject
	3/10/2025 6:55:00 AM	Yates, Lois	Housekeeping Complete
Results Per Page: 50			

A list of existing notes is displayed.

This form allows you to record shift notes and is used for reference purposes only. The notes saved do not affect other functionality.

For example, this could be a place to maintain records of housekeeping or events that may have occurred.

Select ADD NEW to record a note.



Date and Time: 03/10/2025 6:55 AM Shift ID:

Log Subject: Housekeeping Complete

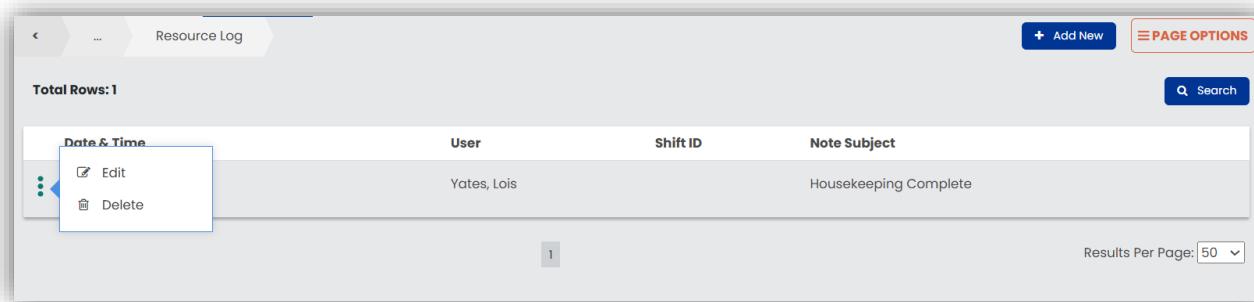
**Resource Daily or Shift Log Area -**

All bed linens and restrooms cleaned.

Save Cancel

Enter the appropriate details, including the date and time, subject, and the note, and then click SAVE.

Off the note's menu, you have the option to Edit or Delete the record.



Total Rows: 1

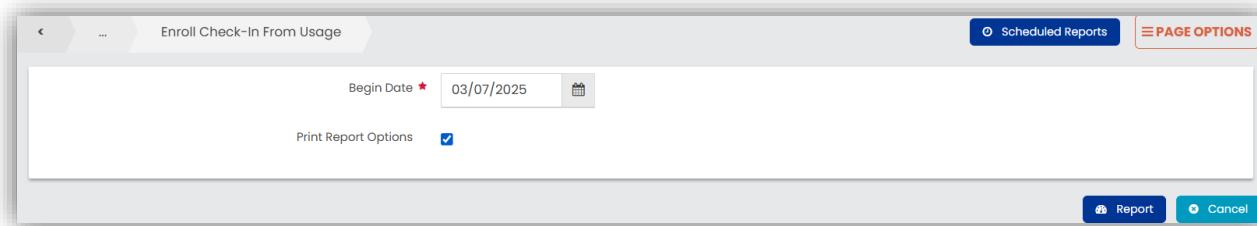
Date & Time	User	Shift ID	Note Subject
<input checked="" type="checkbox"/> Edit <input type="checkbox"/> Delete	Yates, Lois		Housekeeping Complete

1 Results Per Page: 50

## Housing Check-In

Housing Check-In allows you to run a report with details of Clients who have checked into the selected Resource Usage for the chosen date.

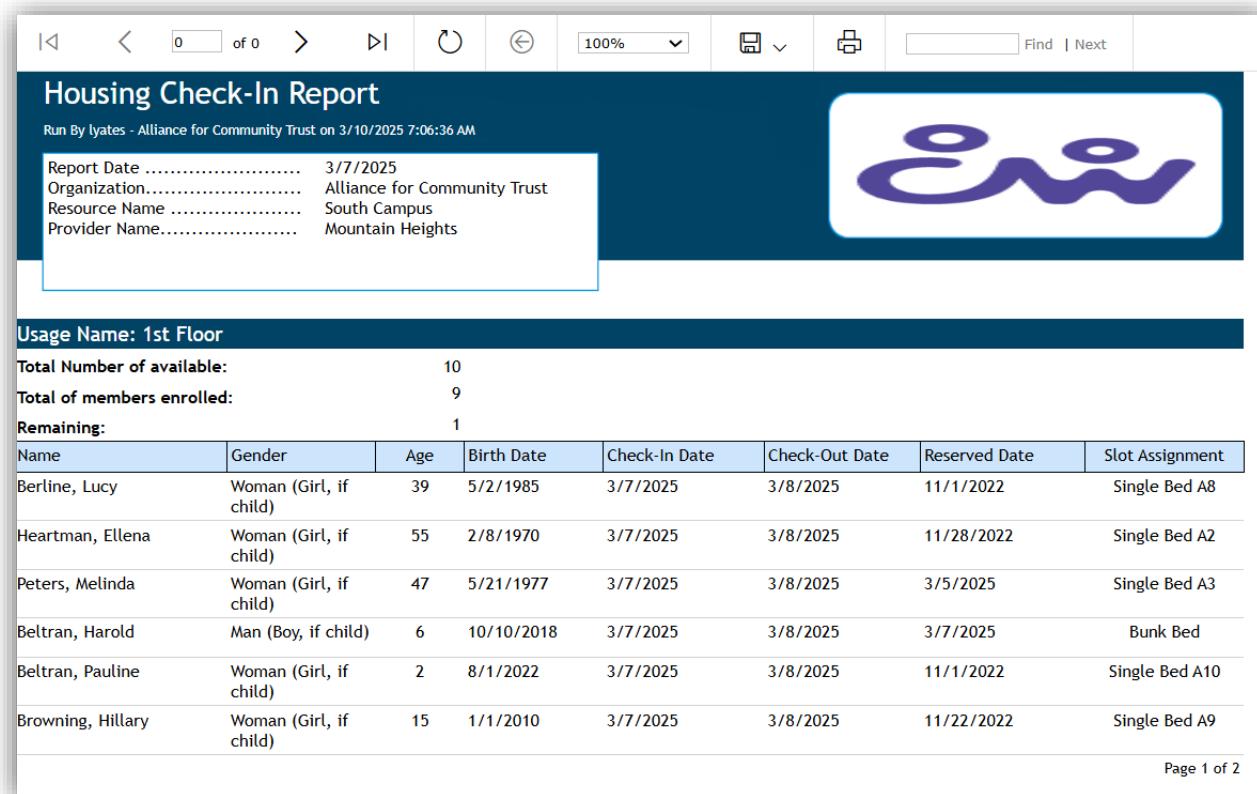
All the reports can be scheduled to automatically generate and to email to selected Users recurring on a set date and time.



To run the report, first select the **Begin Date**. The date defaults to today but can be changed as needed.

Select **Print Report Options** to include the report's parameters on the second page of the report.

Then, select REPORT.



Name	Gender	Age	Birth Date	Check-In Date	Check-Out Date	Reserved Date	Slot Assignment
Berline, Lucy	Woman (Girl, if child)	39	5/2/1985	3/7/2025	3/8/2025	11/1/2022	Single Bed A8
Heartman, Ellena	Woman (Girl, if child)	55	2/8/1970	3/7/2025	3/8/2025	11/28/2022	Single Bed A2
Peters, Melinda	Woman (Girl, if child)	47	5/21/1977	3/7/2025	3/8/2025	3/5/2025	Single Bed A3
Beltran, Harold	Man (Boy, if child)	6	10/10/2018	3/7/2025	3/8/2025	3/7/2025	Bunk Bed
Beltran, Pauline	Woman (Girl, if child)	2	8/1/2022	3/7/2025	3/8/2025	11/1/2022	Single Bed A10
Browning, Hillary	Woman (Girl, if child)	15	1/1/2010	3/7/2025	3/8/2025	11/22/2022	Single Bed A9

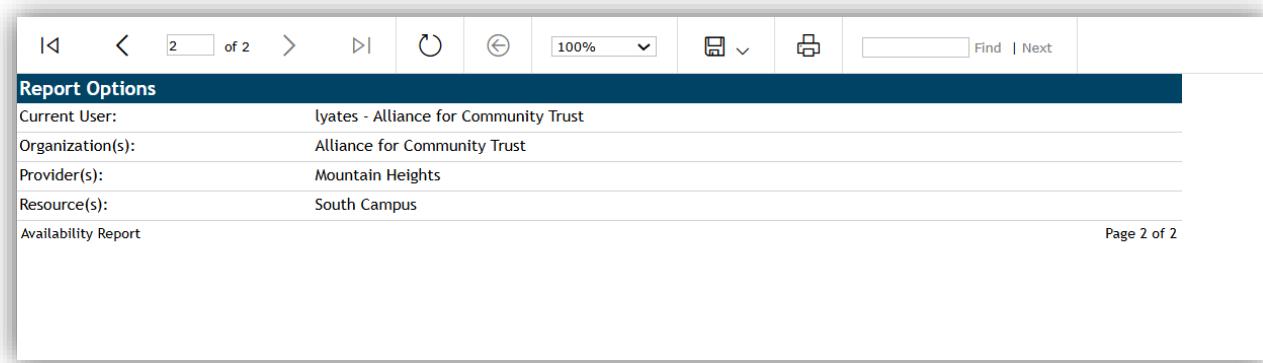
At the top of the report, the details about how the report was generated are displayed.

Details about the Usage as of the selected date are also displayed, including the Usage name, how many slots are available, how many are reserved, and how many are still open.

Specific Client information is also included on the report. Only Clients that have checked in are displayed.

Each Client is displayed with their name, gender, age, the dates of the reservation, and the slot they are assigned.

The second page displays the report options, including the current User, as well as the selected Organization, Provider, Resource, and Usage.



Using the toolbar at the top, the report can be saved in multiple formats and can be printed.

## Availability Report

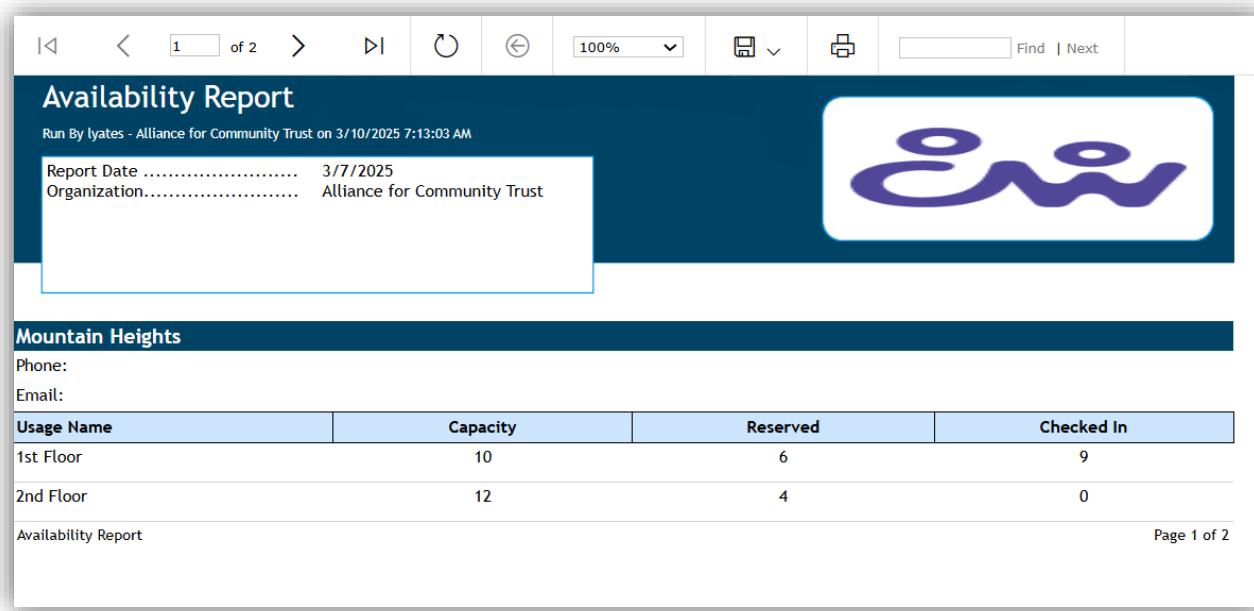
The next option on the Usage menu is Availability Report, which is another report. This option displays the Emergency Housing availability for ALL the Resource's Usages for a selected date.



Select the **Begin Date**, which defaults to today but can be changed.

Select **Print Report Options** to include the report's parameters on the second page of the report.

Then, run the report.



The screenshot shows the 'Availability Report' page. At the top, it displays 'Run By lyates - Alliance for Community Trust on 3/10/2025 7:13:03 AM'. Below this, there is a box containing 'Report Date ..... 3/7/2025' and 'Organization..... Alliance for Community Trust'. To the right is the CaseWorthy logo. The main content area is titled 'Mountain Heights' and includes fields for 'Phone:' and 'Email:'. A table follows, showing usage data:

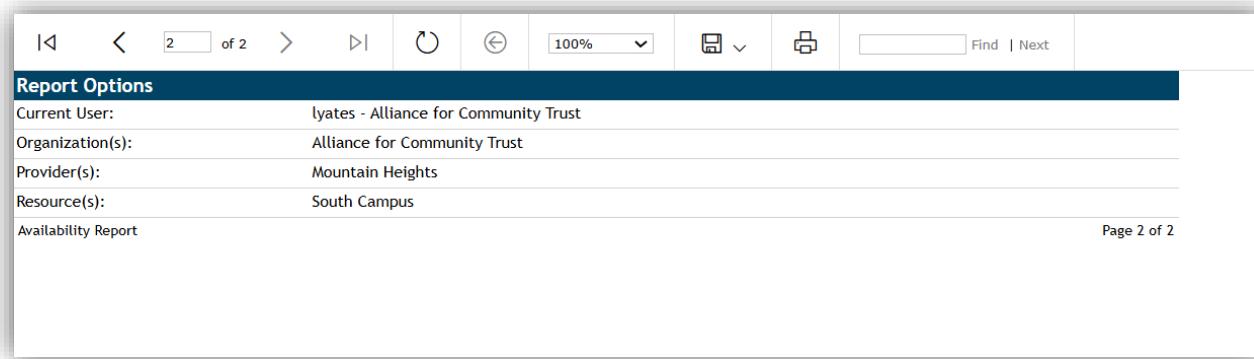
Usage Name	Capacity	Reserved	Checked In
1st Floor	10	6	9
2nd Floor	12	4	0

At the bottom left is the 'Availability Report' link, and at the bottom right is 'Page 1 of 2'.

The details about the report are displayed at the top, including the User's name, the Organization, and the date and time the report was run.

Details about the Provider and its Emergency Housing Resources as of today's date are also displayed, including each of the Usages, their capacity, how many slots are reserved, and how many slots are already checked in.

The second page displays the report options, including the current User, as well as the selected Organization, Provider, Resource, and Usage.

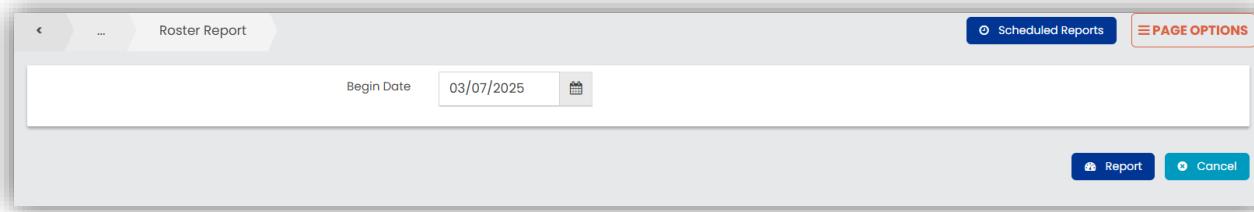


The screenshot shows the 'Report Options' page. At the top, it displays 'Current User: lyates - Alliance for Community Trust'. Below this, there are four dropdown menus: 'Organization(s):' set to 'Alliance for Community Trust', 'Provider(s):' set to 'Mountain Heights', and 'Resource(s):' set to 'South Campus'. The bottom left is the 'Availability Report' link, and the bottom right is 'Page 2 of 2'.

Using the toolbar at the top, the report can be saved in multiple formats and can be printed.

## Check-In Roster Report

The next option is the Check-in Roster Report which generates a list of all Clients for the selected Usage that are reserved for a selected date. Typically, this report is printed so Clients can sign when they check-in. This hard copy roster can then be used for reference later.



Select the **Begin Date**, which defaults to today but can be changed.

Then, run the report.

Usage Name: 1st Floor		Max Capacity: 10	
Name	Gender	Slot	Signature
Beltran, Harold	Man (Boy, if child)	Bunk Bed	
Beltran, Pauline	Woman (Girl, if child)	Single Bed A10	
Berline, Lucy	Woman (Girl, if child)	Single Bed A8	
Browning, Hillary	Woman (Girl, if child)	Single Bed A9	
Heartman, Ellena	Woman (Girl, if child)	Single Bed A2	
Peters, Melinda	Woman (Girl, if child)	Single Bed A3	

At the top of the report, the details about how the report was generated are displayed along with the Provider.

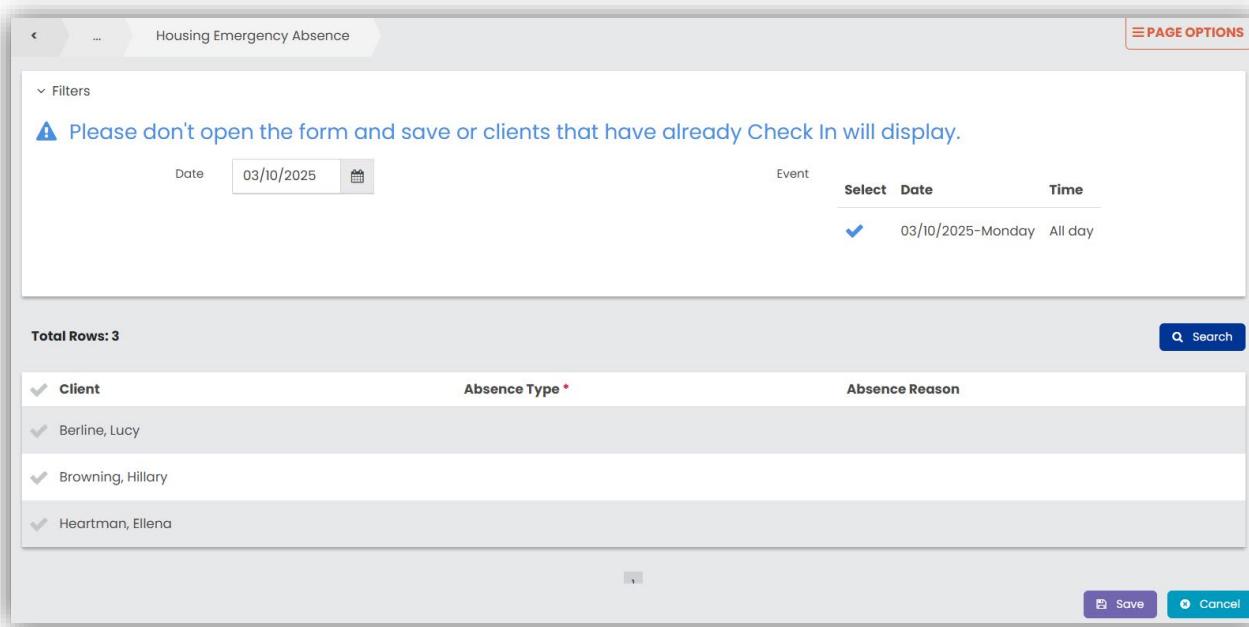
Details about the Usage are highlighted in green.

And information about each Client with a reservation for this Usage for the selected date display, including the Client's name and gender, their assigned slot, and a space for the Client's signature.

Use the toolbar at the top to save or print the report.

## Housing Emergency Absence

The last option on the Usage's menu is Housing Emergency Absence.



**Housing Emergency Absence**

Date: 03/10/2025

Event: Select Date Time  
03/10/2025-Monday All day

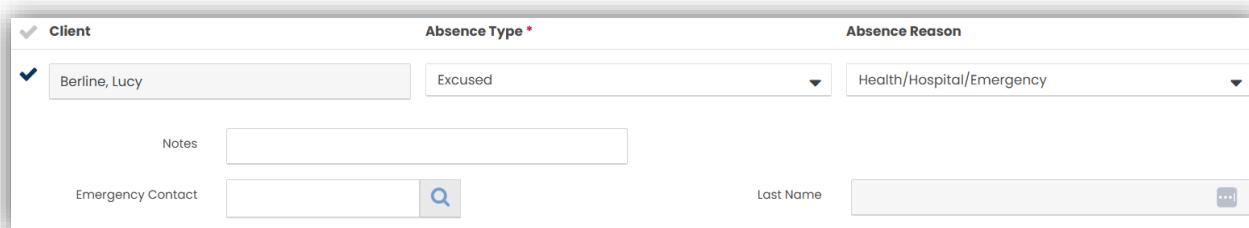
Total Rows: 3

Client	Absence Type *	Absence Reason
Berline, Lucy		
Browning, Hillary		
Heartman, Ellena		

Save Cancel

The *Housing Emergency Absence* form allows you to mark Clients absent for a selected date. Only Clients with a reservation who are not checked in are displayed.

Select the Client who is absent.



Client	Absence Type *	Absence Reason
Berline, Lucy	Excused	Health/Hospital/Emergency
Notes		
Emergency Contact	<input type="text"/>	Last Name <input type="text"/>

Select the **Absence Type**. It is set to “Excused” by default but can be changed.

You can also select the **Absence Reason**, but it is not required.

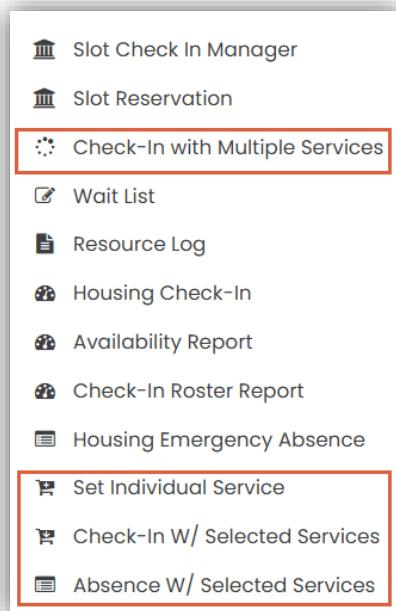
Enter additional notes and select an emergency contact, if needed, then SAVE your changes.

Since the Client is marked absent, they will no longer display on this form.

## Multi-Service Usage

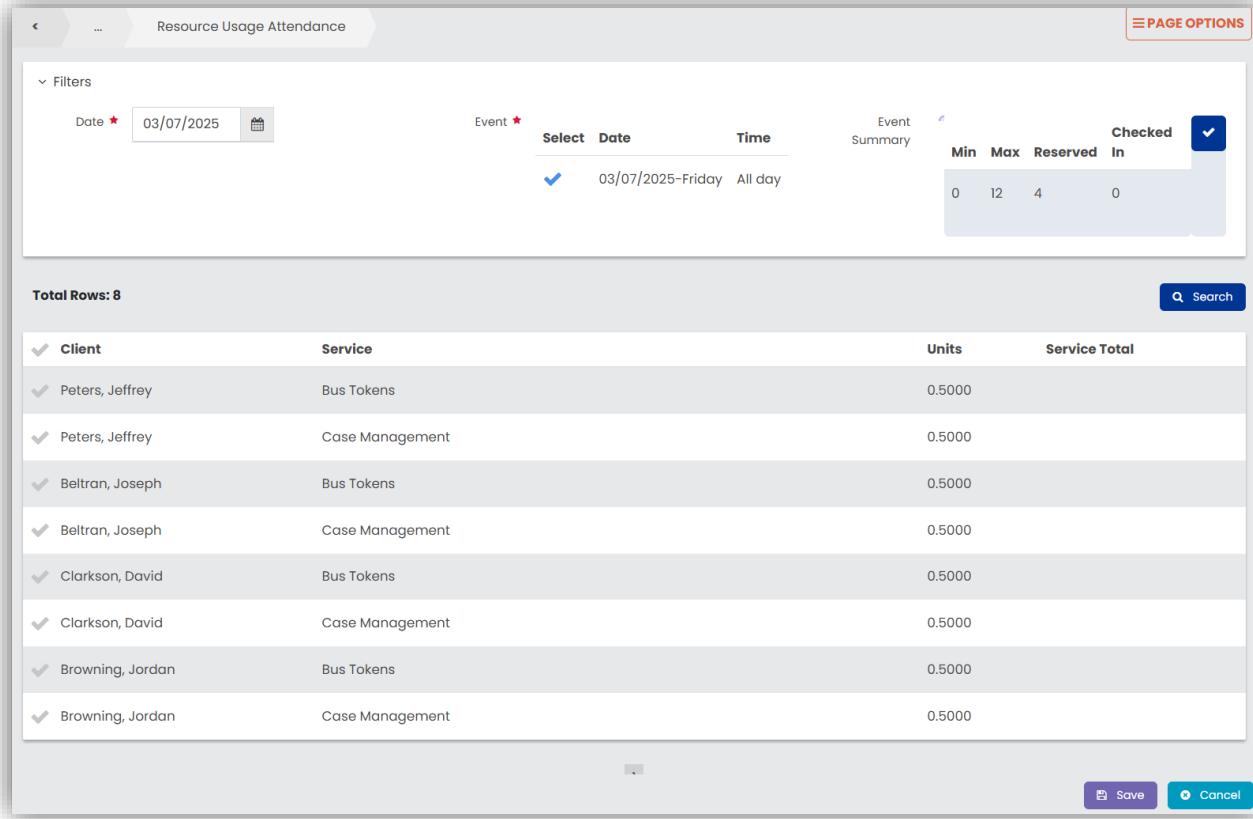
If a Usage is set to post to multiple services, the menu options appear a little different.

Many of the options are the same as a single-service usage. In this section, we are only going to review the options that are different.



## Check-In with Multiple Services

Now, when we navigate to the Usage's menu, Check-in with Multiple Services is available which replaces Check In for a single service Usage.



The screenshot shows the 'Resource Usage Attendance' page. At the top, there is a date filter set to '03/07/2025'. Below the filter, there is an 'Event' section with 'Select', 'Date', and 'Time' fields, showing '03/07/2025-Friday All day'. To the right of the event section is an 'Event Summary' table with columns: Min, Max, Reserved, Checked In. The 'Checked In' column has a checked checkbox. Below the event summary is a table titled 'Total Rows: 8' containing the following data:

Client	Service	Units	Service Total
Peters, Jeffrey	Bus Tokens	0.5000	
Peters, Jeffrey	Case Management	0.5000	
Beltran, Joseph	Bus Tokens	0.5000	
Beltran, Joseph	Case Management	0.5000	
Clarkson, David	Bus Tokens	0.5000	
Clarkson, David	Case Management	0.5000	
Browning, Jordan	Bus Tokens	0.5000	
Browning, Jordan	Case Management	0.5000	

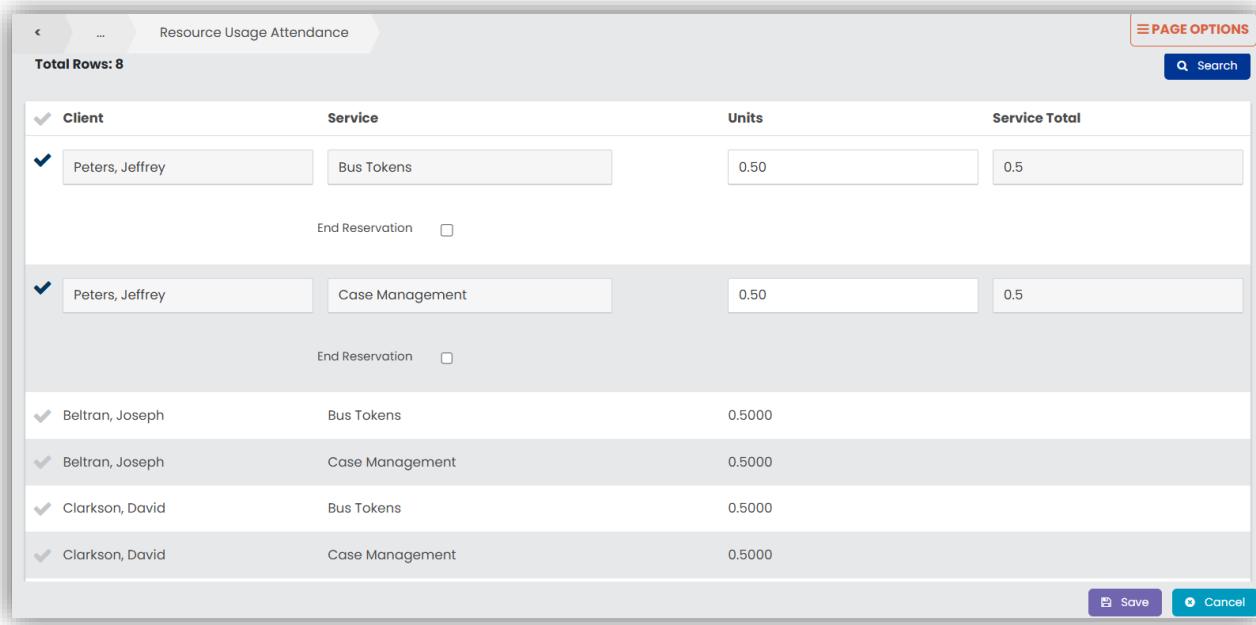
At the bottom right of the table are 'Save' and 'Cancel' buttons.

This form works the same as *Check In* which requires you to select a date to search for reservations, and you can click the checkmark in the top right corner to check all Clients in at one time.

Usages with multi-services like this one do not provide the option to check Clients in using scan cards.

On this form, each attendance service appears as a separate record. Notice how our Clients have three records, once for each possible service they could receive.

Select the services they received and update the units, if necessary.



The screenshot shows a table titled "Resource Usage Attendance" with the following data:

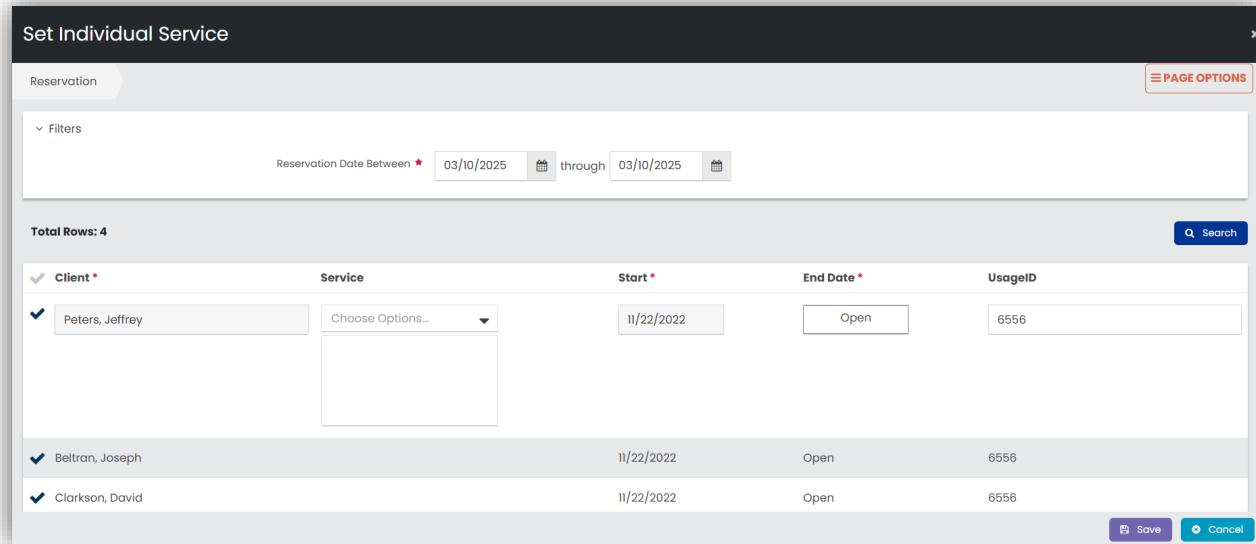
Client	Service	Units	Service Total
Peters, Jeffrey	Bus Tokens	0.50	0.5
Peters, Jeffrey	Case Management	0.50	0.5
Beltran, Joseph	Bus Tokens	0.5000	
Beltran, Joseph	Case Management	0.5000	
Clarkson, David	Bus Tokens	0.5000	
Clarkson, David	Case Management	0.5000	

Buttons at the bottom right include "Save" and "Cancel".

SAVE when done.

## Set Individual Service

Set Individual Service works with Check-in W/Selected Services. Together they provide a two-step process to first select the necessary services and then to check-in the Clients.



The screenshot shows a table titled "Set Individual Service" with the following data:

Client *	Service	Start *	End Date *	UsageID
Peters, Jeffrey	Choose Options...	11/22/2022	Open	6556
Beltran, Joseph		11/22/2022	Open	6556
Clarkson, David		11/22/2022	Open	6556

Buttons at the bottom right include "Save" and "Cancel".

The reservations are displayed based on the selected dates, which default to today but can be changed.

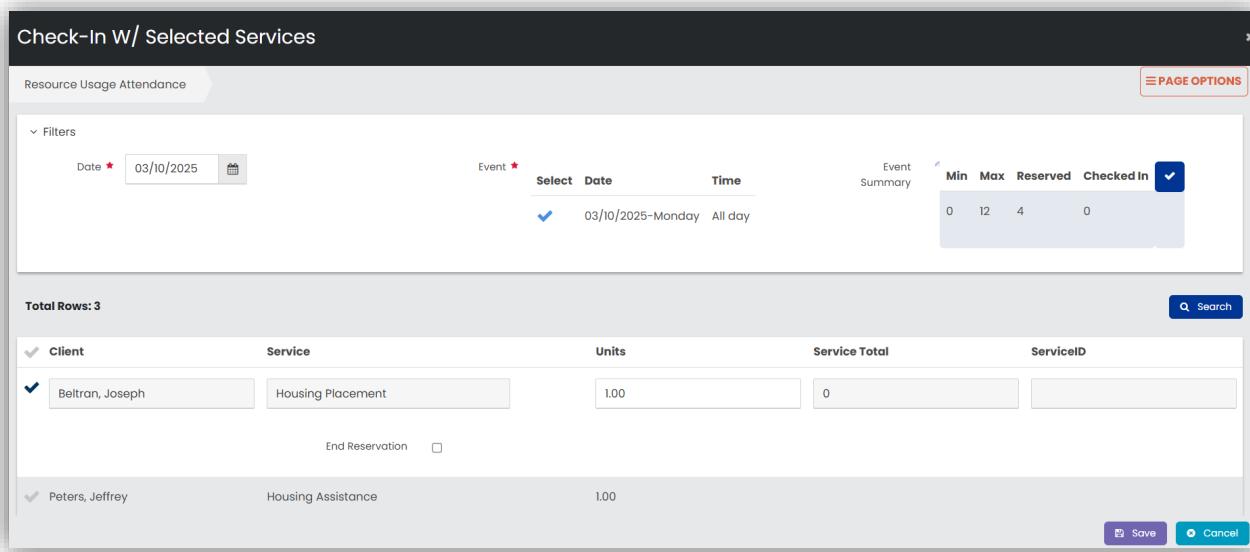
Each Client with a reservation for the selected date range displays, including their name and reservation period.

Select a Client's record to update which services should be posted.

SAVE the form.

## Check-In with Selected Services

Check-in W/Selected Services displays all Clients with services selected on the *Set Individual Service* form so they can be quickly checked-in if necessary.



The screenshot shows the 'Check-In w/ Selected Services' interface. At the top, there is a header bar with the title 'Check-In w/ Selected Services' and a 'PAGE OPTIONS' button. Below the header is a 'Resource Usage Attendance' section with a 'Filters' dropdown, a date input set to '03/10/2025', and a summary table showing event details: 'Event' (03/10/2025-Monday All day), 'Min' (0), 'Max' (12), 'Reserved' (4), and 'Checked In' (0). A 'Search' button is also present. The main body of the form displays a table with three rows of data. The columns are labeled 'Client', 'Service', 'Units', 'Service Total', and 'ServiceID'. The first row shows 'Beltran, Joseph' with 'Housing Placement' service, '1.00' units, and '0' total. The second row shows 'Peters, Jeffrey' with 'Housing Assistance' service, '1.00' units, and '0' total. There is an 'End Reservation' checkbox next to the second row. At the bottom right of the table area are 'Save' and 'Cancel' buttons.

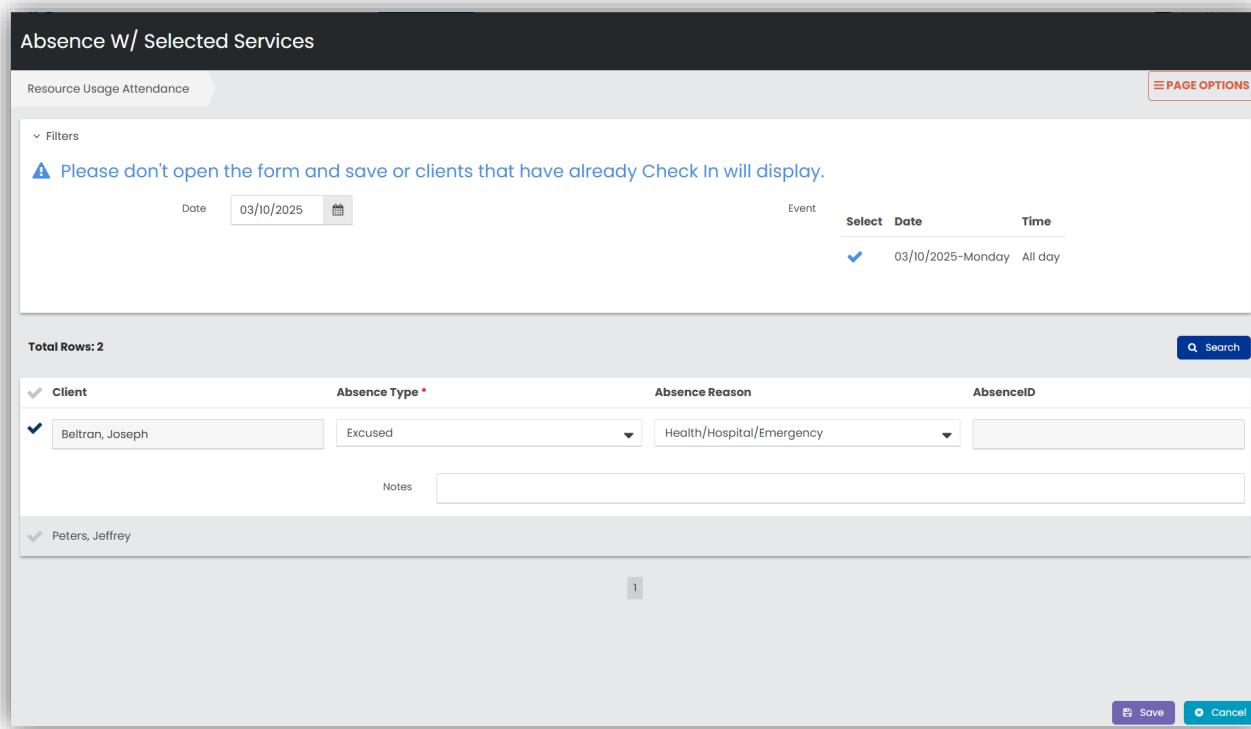
Client	Service	Units	Service Total	ServiceID
Beltran, Joseph	Housing Placement	1.00	0	
Peters, Jeffrey	Housing Assistance	1.00	0	

This form is like the *Check In with Multiple Services* form and provides you with the opportunity to easily check-in all Clients at one time by selecting the checkmark in the top right corner.

## Absence W/ Selected Services

The last multi-service option is Absence W/ Selected Services which allows you to mark a Client absent from a reservation, as well as view a list of Clients that have been marked as absent from a reservation.

This form will only display Clients that have not yet been checked in.



Client	Absence Type *	Absence Reason	AbsenceID
Beltran, Joseph	Excused	Health/Hospital/Emergency	
Peters, Jeffrey			

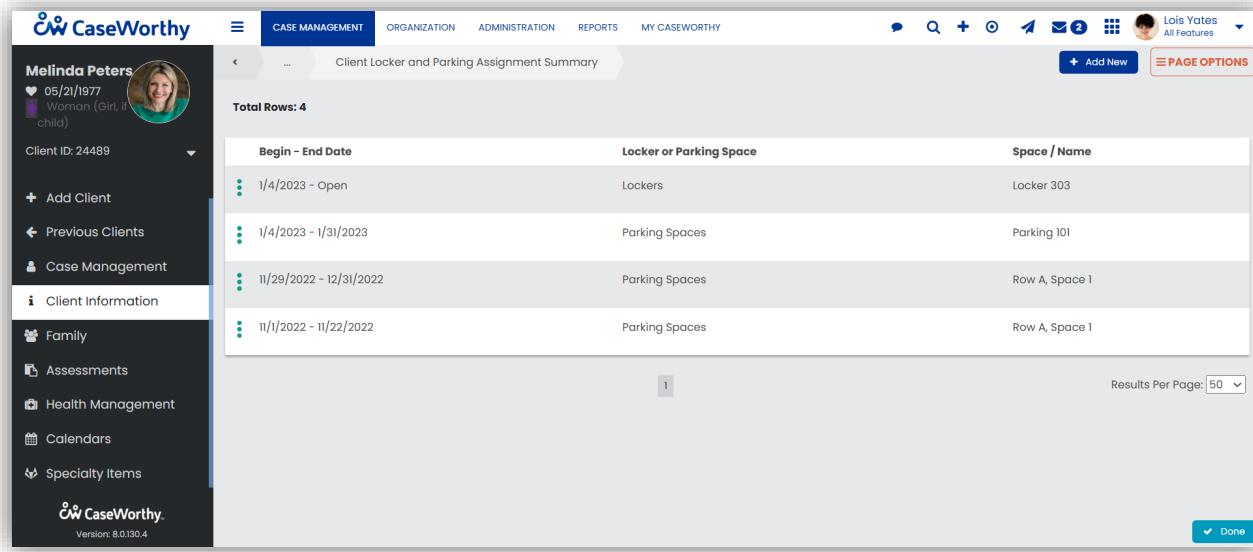
Select the Client who is absent. Then, select the **Absence Type** and the **Absence Reason**.

Enter additional notes as needed and then **SAVE** the form.

# Assigning Lockers and Parking Spots

During Resource setup, lockers and parking spaces were added. Every Provider Resource can include these amenities, which are then assigned to Client's individually on the Case Management tab.

**Navigation** Case Management tab: Client Information > Locker and Parking Assignment



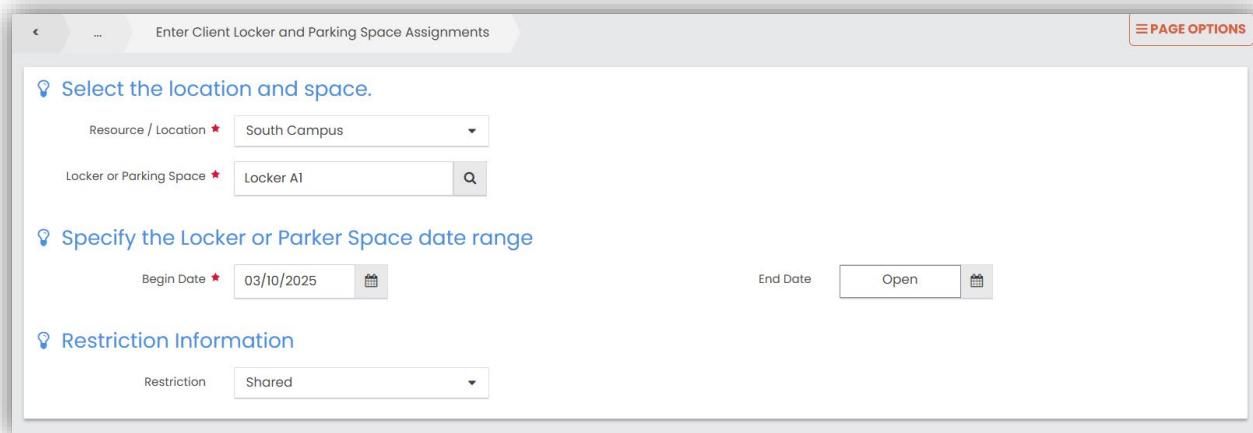
The screenshot shows the CaseWorthy software interface. On the left, there is a sidebar with a user profile for Melinda Peters (Client ID: 24489) and links to various modules like Client Information, Family, Assessments, Health Management, Calendars, and Specialty Items. The main content area is titled "Client Locker and Parking Assignment Summary". It displays a table with four rows of data:

Begin - End Date	Locker or Parking Space	Space / Name
1/4/2023 - Open	Lockers	Locker 303
1/4/2023 - 1/31/2023	Parking Spaces	Parking 101
11/29/2022 - 12/3/2022	Parking Spaces	Row A, Space 1

At the bottom right of the table, there is a "Results Per Page" dropdown set to 50, and a "Done" button.

A list is displayed that includes lockers and parking spaces the Client has already been assigned.

Select ADD NEW to add a new locker or parking space assignment.



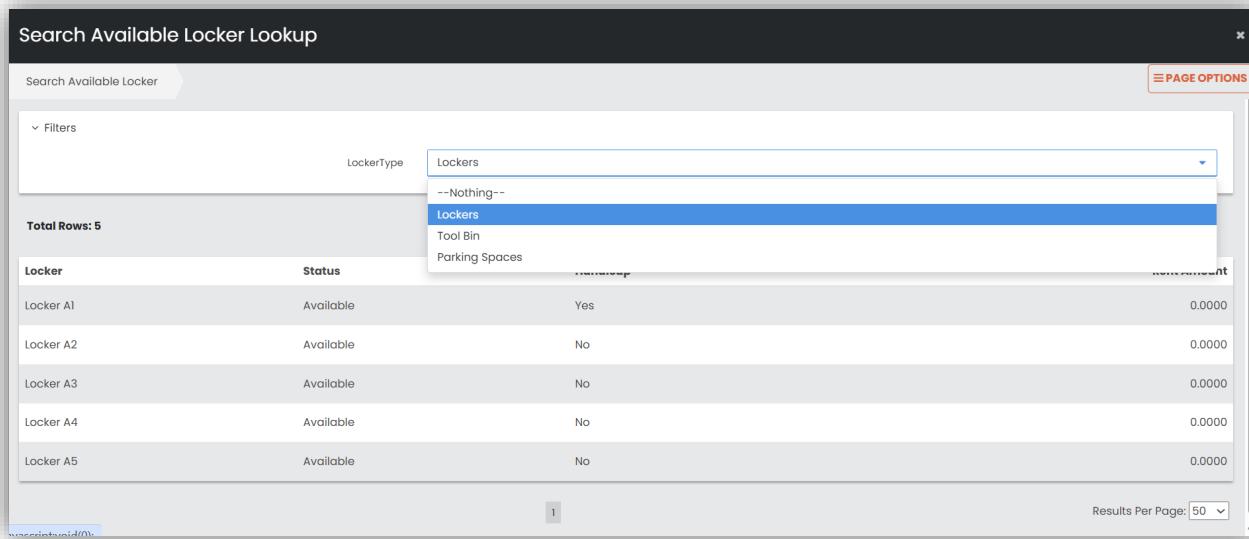
The screenshot shows the "Enter Client Locker and Parking Space Assignments" form. It has three main sections:

- Select the location and space.** Includes a dropdown for "Resource / Location" (set to "South Campus") and a text input for "Locker or Parking Space" (set to "Locker A1").
- Specify the Locker or Parker Space date range.** Includes "Begin Date" (03/10/2025) and "End Date" (Open).
- Restriction Information.** Includes a dropdown for "Restriction" (set to "Shared").

Start by selecting the **Resource**.

All the Provider's Resources are listed.

Click the lookup icon to select from a list of available lockers or parking spaces for the selected Resource. The search form defaults to available “Lockers” but can also be changed to view a list of available “Parking Spaces”.

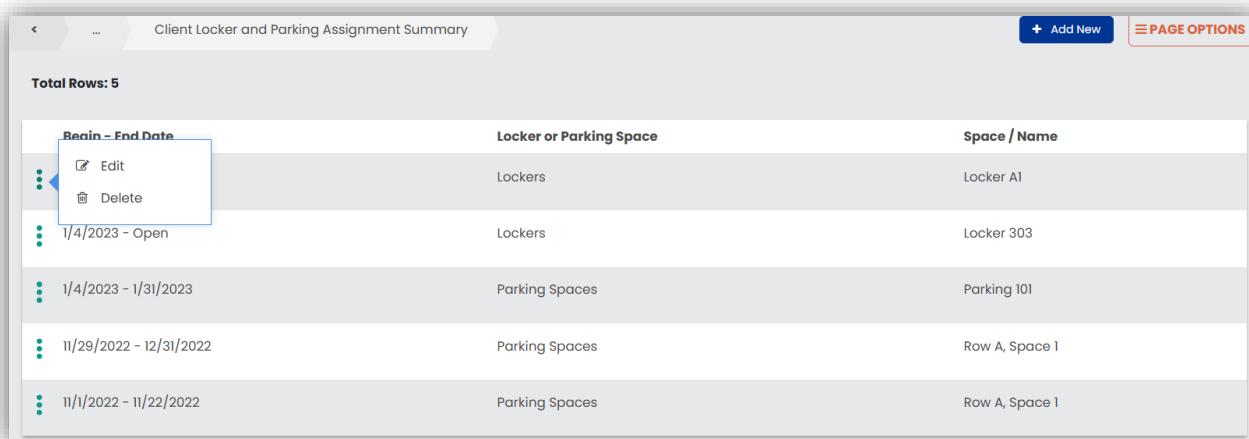


Locker	Status	Amount
Locker A1	Available	Yes 0.0000
Locker A2	Available	No 0.0000
Locker A3	Available	No 0.0000
Locker A4	Available	No 0.0000
Locker A5	Available	No 0.0000

The **Begin Date** is set to today and the **End Date** is set to “Open” by default, but both can be updated, as necessary.

The **Restriction** level follows the Organization’s data level sharing rules. It is set to “Shared” by default but can also be changed.

Each assignment can also be edited or deleted off the record’s menu.



Begin - End Date	Locker or Parking Space	Space / Name
1/4/2023 - Open	Lockers	Locker A1
1/4/2023 - 1/31/2023	Lockers	Locker 303
1/4/2023 - 1/31/2023	Parking Spaces	Parking 101
1/29/2022 - 12/31/2022	Parking Spaces	Row A, Space 1
1/1/2022 - 1/1/2022	Parking Spaces	Row A, Space 1

# Classroom Configuration

Another frequently used Resource is Classroom. This Resource Usage allows for efficient allocation and management of training materials, physical spaces, and equipment. By incorporating this functionality, your Organization can monitor availability, schedule usage, and track utilization metrics to optimize learning environments. This process helps prevent double-booking, ensures resources are used effectively, and provides insights into your impact on training outcomes. Whether managing physical classrooms, digital learning tools, or instructional materials, a structured approach to resource tracking enhances operational efficiency and supports effective training delivery.

As discussed in the first section, a Resource refers to a designated space and/or time where Clients receive services. Each Resource is assigned to a Resource Category, which defines its type and purpose. Resource Usage specifies how a Resource is utilized based on its type, and each Resource can have multiple Usages, allowing for flexibility in service documentation.

In this example, we will create a Classroom Resource with two locations, which are referred to as Usages. Since these Usages include desks, they will be configured with a Usage Type of “Slots”.

It is important to note all configuration takes place within the Administration tab.

## Resources Summary Form

To view a list of existing Resources for a Provider, open the *Resources* summary form.

**Navigation** Administration tab: Setup > Organizations – Organizations menu > Providers – Providers menu > Resources

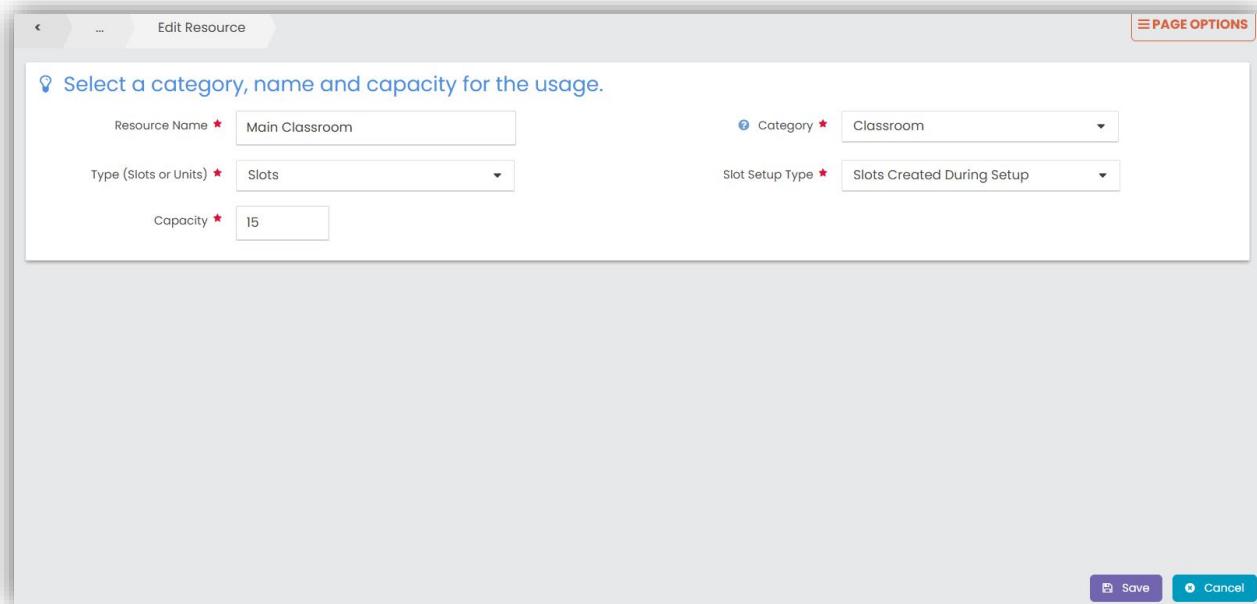
Resources				
Filters		Actions		
Category	Resource Name	Units / Slots	Capacity	Resource ID
Classroom	Classroom C	Slots	15	2634
Classroom	Downtown Classroom	Slots	5	2635
Classroom	Classroom D	Slots	10	2642
Housing Emergency	Downtown Campus	Slots	10	2628
Housing Emergency	South Campus	Slots	5	2633

Each Resource includes its assigned **Category**, identifying name, Resource type, which is either “Units” or “Slots”, and its Resource capacity.

## Add a Resource

This Resource represents the classroom in which the Provider offers various classes.

Select ADD RESOURCE.



The form is titled "Edit Resource" and contains the following fields:

- Resource Name \***: Main Classroom
- Type (Slots or Units) \***: Slots
- Capacity \***: 15
- Category \***: Classroom
- Slot Setup Type \***: Slots Created During Setup

At the bottom right are "Save" and "Cancel" buttons.

**Resource Name** can be anything that describes the Resource or the place and or time that the Provider uses to offer services.

- If the Provider only offers services out of its own location, this may be a room number within that location.
- If they offer services from various locations in the community, this may be the address or name of the community building.

The **Category** should reflect how the Resource is used, and the selection will determine what other functionality will become available during setup, as well as in Case Management. In this example, we will select “Classroom”.

The **Type (Slots or Units)** describes the type of space but more specifically the space into which Clients will be reserved and checked into.

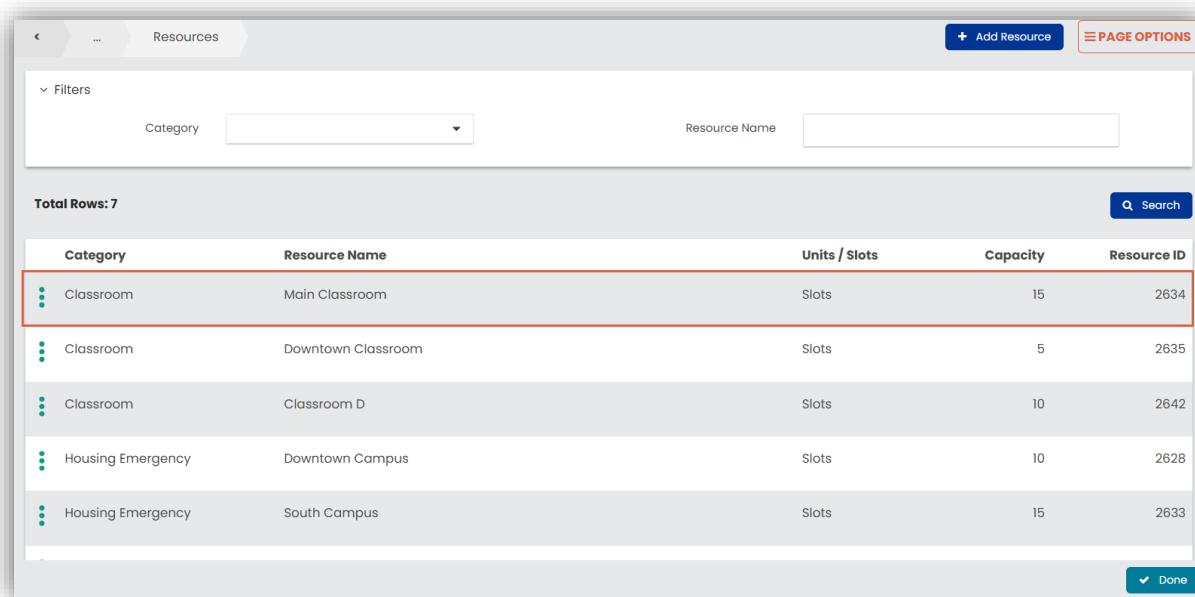
- “Units” are typically used when there is one Resource used by multiple Clients at one time, like an apartment.
- “Slots” are typically one slot per Client. For example, desks in a Classroom. We will select “Slots” in this example.

**Slot Setup Type** determines if the slot should be created when the Usage is initially created by the System Administrator or during the Client check-in process. Because a classroom most likely has a limited number of desks, selecting “Slots Created During Setup” is the preferable option and will save you time when configuring your Usages later.

Enter the **Capacity** for the Resource, which is the maximum number of Clients the Resource can support, such as fifteen desks.

Select SAVE.

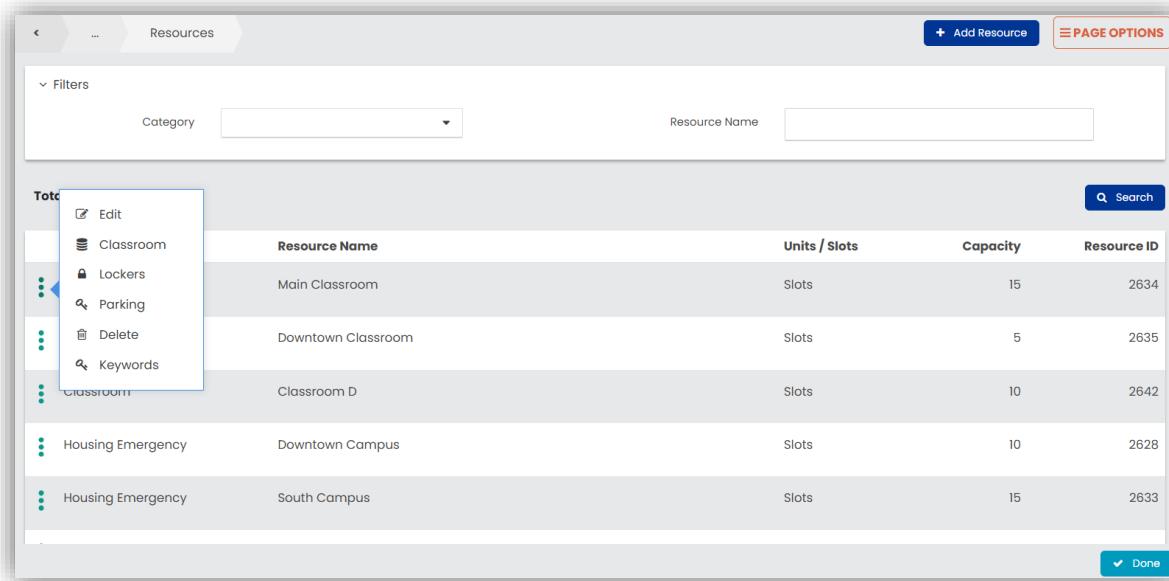
The new Resource is now displayed on the summary form.



Category	Resource Name	Units / Slots	Capacity	Resource ID
Classroom	Main Classroom	Slots	15	2634
Classroom	Downtown Classroom	Slots	5	2635
Classroom	Classroom D	Slots	10	2642
Housing Emergency	Downtown Campus	Slots	10	2628
Housing Emergency	South Campus	Slots	15	2633

## Resource Menu

Use the vertical ellipsis menu to further configure the Resource. The menu is dynamic and changes depending on the Resource Category assigned.



The screenshot shows a list of resources categorized under 'Classroom'. A context menu is open for the first item, 'Main Classroom', listing options: Edit, Classroom, Lockers, Parking, Delete, and Keywords. The 'Edit' option is selected. The main table displays the following data:

	Resource Name	Units / Slots	Capacity	Resource ID	
1	Main Classroom	Slots	15	2634	
2	Downtown Classroom	Slots	5	2635	
3	Classroom D	Slots	10	2642	
4	Housing Emergency	Downtown Campus	Slots	10	2628
5	Housing Emergency	South Campus	Slots	15	2633

Since the Resource Category is “Classroom” in this example, the menu allows you to edit the Resource, create and manage associated Usages, create and assign lockers and parking, delete the Resource, as well as create Keywords for the Classroom.

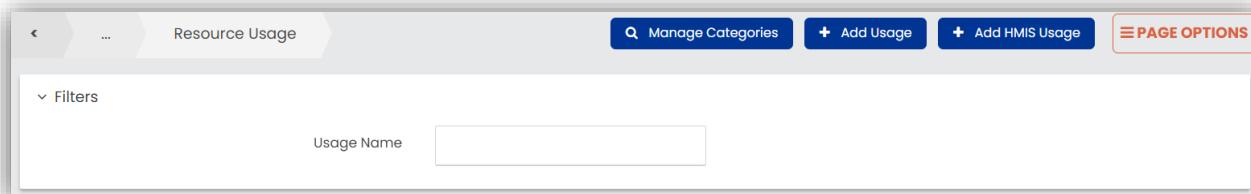
### Edit

Use Edit to update the details of the Resource.

### Usages - Classroom

Once a Resource is created, Usages must also be added. Remember, the Usages are how the Resource is used or reserved based on its type, which in this example is “Classroom”.

Select Classroom to view a list of existing Usages. Since this is a new Resource, there are no existing Usages.



The screenshot shows a list of usages for the 'Main Classroom' resource. The table displays the following data:

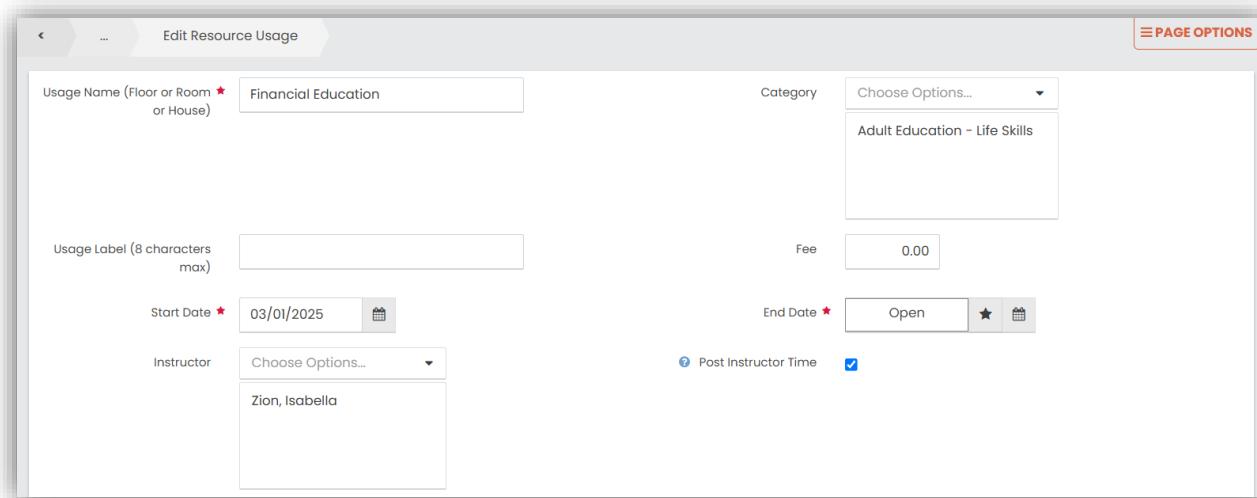
	Usage Name
1	(empty)

The MANAGE CATEGORIES button at the top allows you to manage the list of available categories that can be assigned to a Usage. A category is not required, but it can be useful for filtering search results.

Add any necessary categories before continuing to add the Usages.

There are two options for adding new Usages, Add USAGE and ADD HMIS USAGE.

Both options are similar. The ADD HMIS USAGE option includes additional options, displays individual slot details, and is useful for HMIS functionality. If you are not using HMIS, ADD USAGE is the recommended method for adding a Usage.



The screenshot shows the 'Edit Resource Usage' form. The 'Usage Name (Floor or Room or House)' field contains 'Financial Education'. The 'Category' section shows a dropdown menu with 'Choose Options...' and a sub-menu item 'Adult Education - Life Skills'. The 'Fee' field is set to '0.00'. The 'Start Date' field is set to '03/01/2025'. The 'End Date' field is set to 'Open' with a star icon. The 'Instructor' section shows a dropdown menu with 'Choose Options...' and a sub-menu item 'Zion, Isabella'. The 'Post Instructor Time' checkbox is checked.

In this example, we are creating two different classes to be offered at this location.

The first Usage is for Financial Education.

**Usage Name** is a description used to differentiate this Usage from others within the same Resource.

**Category** is used to filter on forms and reports. The categories can be updated through MANAGE CATEGORIES on the *Resource Usage* summary form.

It is important to note that some functionalities within Resources and Usages do require a specific Usage Category to be assigned. In this example, a Category is not required. For more details about different Resource Categories, refer to the [Appendix](#). For questions about setup, please contact [training@caseworthy.com](mailto:training@caseworthy.com) or [support@caseworthy.com](mailto:support@caseworthy.com).

**Usage Label, Fee, Instructor, and Post Instructor Time** are not required for a simple Resource Usage configuration but can be entered, as necessary.

The **Start Date** and **End Date** define the availability of the Usage. The **End Date** can be entered or can be set to "Open" by clicking the star icon. The date is set to "Open" by default.

It is important to note that there is a feature in Case Management that allows you to see how many times a Client attended a specific class. This data is calculated based on the end date entered on this form but cannot be calculated if the date is set to open.

Select the **Instructor** for the Classroom, which then allows you to set levels of certification for your instructors, as well as track the number of classes they teach.

For a User to appear for selection as an “Instructor”, they must have an assigned User category of “Instructor” on the *Organization’s User Add/Edit* form.

**Post Instructor Time** will post the instructor’s time in Time Management after the class date passes and Clients have checked in.

Select **Allow Same Day Reservation** if Clients can make a reservation the same day they will be checking in to the Usage.

The Allowable Clients and Accessibility section determines who is allowed access to the Usage.

A validation process occurs when the individual’s reservation is entered. If the Usage does not permit the Client based on these settings, the system will not allow the transaction to be saved.

Allowable Clients and Accessibility	
Allow Females (Age 18+)	<input checked="" type="checkbox"/>
Allow Males (Age 18+)	<input checked="" type="checkbox"/>
Allow Children	<input type="checkbox"/>
Handicap Accessible	<input checked="" type="checkbox"/>
Allow Transgender	<input checked="" type="checkbox"/>
Age - Don't Know / Refused	Allow Reservation / Check-in
Gender - Don't Know / Refused	Allow Reservation / Check-in
Target Population	

Most of these options are based on the details from the *Client Demographics* form.

If you select **Allow Children**, an additional field is displayed allowing you to specify the child’s age group. Select “Younger than 18” to allow every child access to this Usage.

**Handicap Accessible** is the one item that will not affect the validation process but notes the accessibility of the Usage.

On the *Client Demographics* form, there are options with the **Date of Birth** and **Gender** fields where the User can either select “Client Doesn’t Know” or “Client Refused”. If these options were selected for the Client, the age and gender cannot be determined by the application and may affect the Resources and Usages functionality here. Therefore, in the **Age-Don’t Know/Refused** and **Gender-Don’t Know Refused** fields, you can indicate if the Usage should be allowed for these instances.

The **Target Population** identifies if the Usage is reserved for certain populations. This information will then be copied into all the Usage slots if they are automatically generated.

The items within Resource Capacity and Slot Allocation define the capacity of the Usage and when a slot or unit for the Usage is assigned.

**Resource Capacity and Slot Allocation**

Min Capacity *	0	Max Capacity *	15
Slot Assign Event *	At Reservation	Course	Financial Education 1
Use Usage Begin Date as Default in the Reservation form			

**Min Capacity** and **Max Capacity** set how many Clients the Usage can accommodate. For example, a classroom with fifteen desks.

If the Usage's Resource was configured to automatically create slots during setup, the max entered determines the number of slots that will be automatically generated upon the saving of the Usage.

The next option is **Slot Assign Event**. It is important to note that **Slot Assign Event** for the Usage is different than **Slot Setup Type** for the Resource itself.

- **Slot Assign Event** determines when the Usage's slots are assigned to Clients. Slots in a Classroom are most likely desks or chairs. This option allows you to specify if the desks, which are slots, are assigned during the reservation or during check-in.
- In a Classroom, you would most likely want to assign a desk when the reservation is initially made to keep track of general availability.

Next, select the **Course** from the dropdown.

- The list of courses is managed in Codes and Categories.
- If the Usage is a Classroom, you must select the name of the specific course for the functionality to work as intended.
- Selecting a course to categorize the Usage also ties into calendar filtering functionality.

To use the Usage's **Start Date** as the default begin date on any *Reservation* form for this usage, select the **Use Usage Begin Date as Default in the Reservation form** option.

The Contact Preferences section is used to configure when confirmation and reminder emails are sent to the Client about their reservations for the Usage.



**Contact Preferences**

Send Confirmation Email

Send Reminder Email

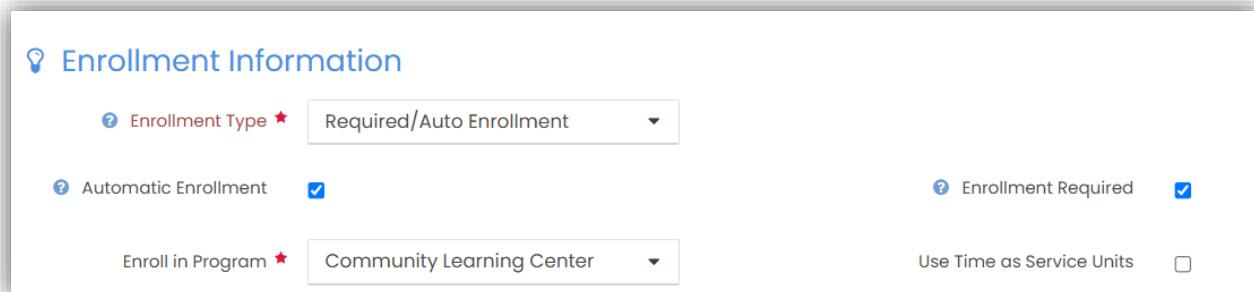
Reminder Email Days  1

Select **Send Confirmation Email** to automatically send an email message to the Client when the reservation is saved. The message is sent to the email address on the *Client Demographics* form.

Select **Send Reminder Email** to automatically send an email message to the Client as a reminder of the upcoming reservation. An additional field appears that prompts you to enter how many days before the reservation the email message should be sent. For example, if you enter “1”, an email message will automatically be sent to the Client’s email address 1 day before the reservation begin date.

## Enrollment Type

In the Enrollment Information section, use **Enrollment Type** to specify if program enrollment is necessary for access to the Usage. Configuration is performed for how services are recorded to the Client’s record as well.



**Enrollment Information**

Enrollment Type  Required/Auto Enrollment

Automatic Enrollment

Enroll in Program  Community Learning Center

Enrollment Required

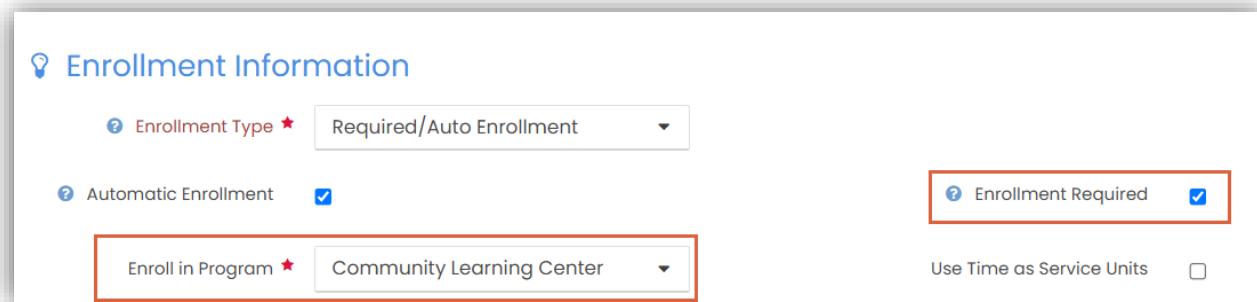
Use Time as Service Units

**Enrollment Type** defines how a program enrollment is managed. Options include “Required/Auto Enrollment”, “Enter Enrollment”, “Enter Enrollment Optional”, and “No Action Required”.

### Required/Auto Enrollment

If the Client must be enrolled in a program to have access to the Usage, “Required/Auto Enrollment” or “Enter Enrollment” should be selected for **Enrollment Type**.

When “Required/Auto Enrollment” is selected, additional fields appear.



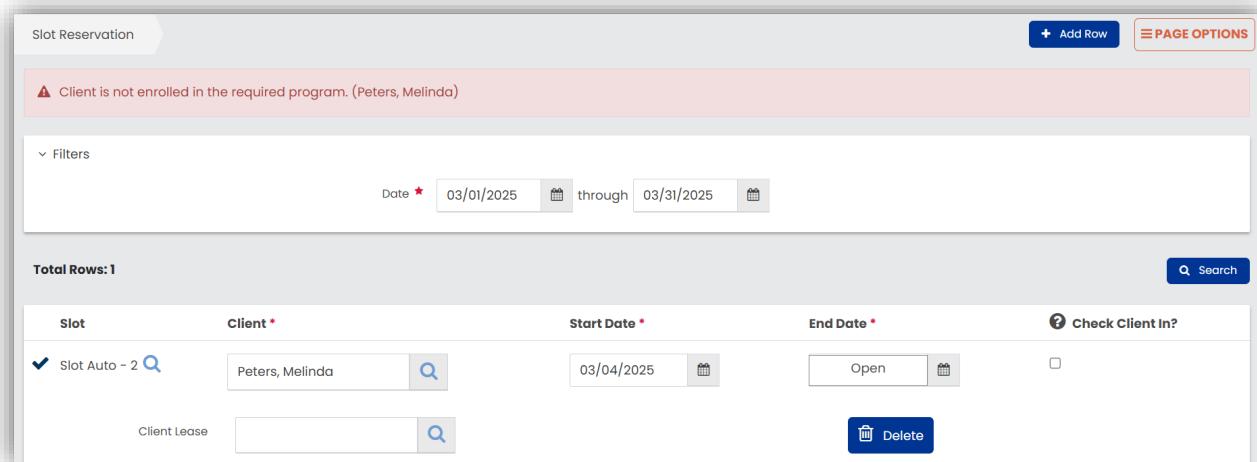
The screenshot shows the "Enrollment Information" section. It includes fields for "Enrollment Type" (set to "Required/Auto Enrollment"), "Automatic Enrollment" (checked), "Enrollment Required" (checked), and "Enroll in Program" (set to "Community Learning Center"). The "Enroll in Program" field is highlighted with a red border.

Select **Enrollment Required** if the Client must be enrolled in the specified program to access this Usage.

If **Automatic Enrollment** is selected, the Client will be automatically enrolled into the selected program if they are not already enrolled. Necessary assessments will still need to be completed, but this prevents the User from having to leave the reservation process to complete the necessary enrollment. If this is not selected, and enrollment is required, they will have to leave the reservation process to complete the enrollment process first. If enrollment is required to gain access to the Usage and its services, select the program for which they should be enrolled here.

It is important to understand a few details about this specific configuration:

- When **Enrollment Required** is selected, the Client will not be allowed access to this Usage if they are not already enrolled in the program identified in **Enroll in Program**.

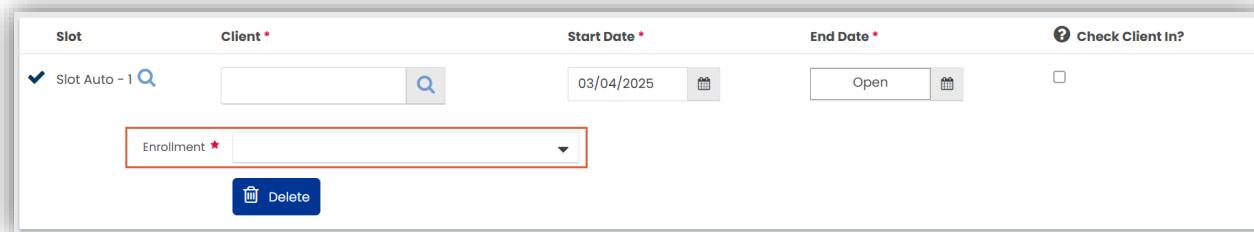


The screenshot shows the "Slot Reservation" page. A message at the top states: "⚠ Client is not enrolled in the required program. (Peters, Melinda)". Below this, there are filters for date range (03/01/2025 to 03/31/2025). The main table lists a single row for "Slot Auto - 2" with "Client" set to "Peters, Melinda". The "Check Client In?" checkbox is checked. The "Delete" button is visible at the bottom right of the table row.

- When **Automatic Enrollment** is selected along with **Enrollment Required**, the Client will be automatically enrolled in the specified program if they are not already.

## Enter Enrollment

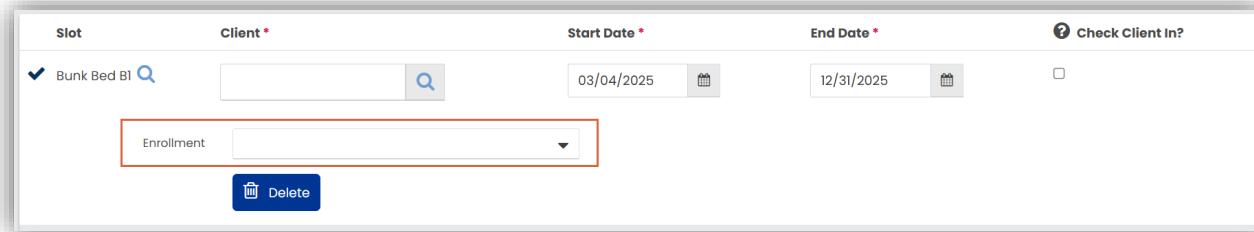
When “Enter Enrollment” is selected, the User will be required to select an existing enrollment upon entering the reservation.



Slot	Client *	Start Date *	End Date *	Check Client In?
<input checked="" type="checkbox"/> Slot Auto - 1 	<input type="text"/> 	03/04/2025 	<input type="text"/> 	<input type="checkbox"/> Open 
<b>Enrollment *</b>  <input type="button" value="Delete"/>				

## Enter Enrollment Optional

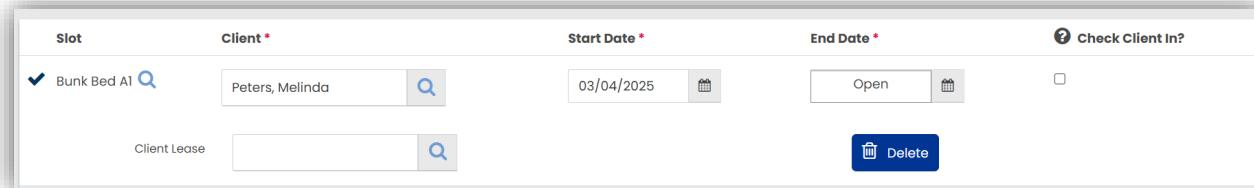
When “Enter Enrollment Optional” is selected, the User will be prompted to select any of the Client’s active enrollments upon entering the reservation, but doing so is optional. If an enrollment is not selected, the Usage will not be reportable in association with a program.



Slot	Client *	Start Date *	End Date *	Check Client In?
<input checked="" type="checkbox"/> Bunk Bed B1 	<input type="text"/> 	03/04/2025 	12/31/2025 	<input type="checkbox"/> Open 
<b>Enrollment</b>  <input type="button" value="Delete"/>				

## No Action Required

When “No Action Required” is selected, the User entering the reservation or during check-in will not be presented with an option to select a program enrollment. If this option is selected, the Usage will not be reportable in association with a program.



Slot	Client *	Start Date *	End Date *	Check Client In?
<input checked="" type="checkbox"/> Bunk Bed A1 	Peters, Melinda 	03/04/2025 	<input type="text"/> 	<input type="checkbox"/> Open 
<b>Client Lease</b>  <input type="button" value="Delete"/>				

For this example, select “Required/Auto Enrollment” as the **Enrollment Type**. Also select both **Automatic Enrollment** and **Enrollment Required**. Also select an appropriate service for **Enroll in Program**.

These settings indicate the following:

- When reservations are made for the Usage, the system will check to see if the Client is a woman or child.
- The system will then check to see if the Client is an adult and is enrolled in the program set in the **Enroll in Program** field.
- If the Client is not enrolled, the system will automatically enroll them and allow the reservation to be saved.

### Allowable Clients and Accessibility

Allow Females (Age 18+)	<input checked="" type="checkbox"/>	Allow Males (Age 18+)	<input checked="" type="checkbox"/>
Allow Children	<input type="checkbox"/>	Handicap Accessible	<input checked="" type="checkbox"/>
Allow Transgender	<input checked="" type="checkbox"/>		
Age - Don't Know / Refused	Allow Reservation / Check-in	Gender - Don't Know / Refused	Allow Reservation / Check-

### Enrollment Information

Enrollment Type *	Required/Auto Enrollment		
Automatic Enrollment	<input checked="" type="checkbox"/>	Enrollment Required	<input checked="" type="checkbox"/>
Enroll in Program *	Community Learning Center	Use Time as Service Units	<input type="checkbox"/>

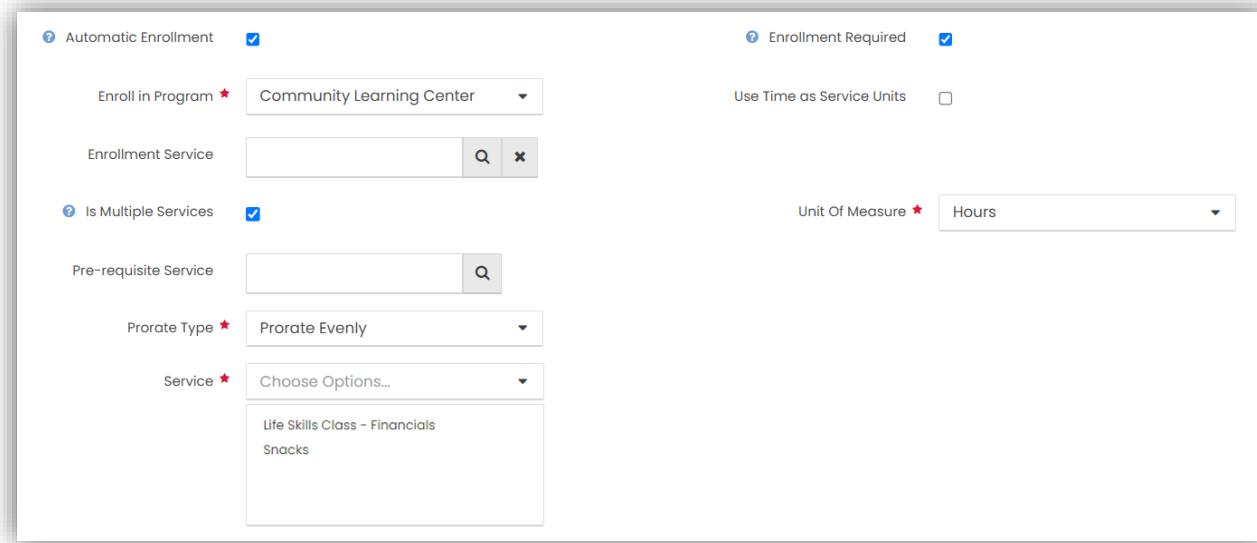
Next is **Use Time as Service Units**. When selected, the unit of time will be used rather than the unit configured for the service. This field is not required.

There are two types of services that can be associated with this Usage.

- The **Enrollment Service** is used to record a service when the Client is initially reserved in a Usage, if necessary. Use the lookup icon to search available services.
- The **Attendance Service** will record the selected service for the Client's when the Client is checked in to the Usage. If the Client is reserved for multiple days, this service will post each day. Again, use the lookup icon to search existing services, and then select the appropriate service.

## Multiple Services

The Usage can be configured to provide multiple services to the Client. To do so, the **Enrollment Type** must be set to “Required/Auto Enrollment”.



When **Multiple Services** is selected, additional fields appear.

“Each” must be selected for the **Unit of Measure**.

In the **Service** multi-select field, choose the services that will be available to the Client.

The services that display are those associated with the program selected in **Enroll in Program** and have a **Unit of Measure** of “Each”.

**Prorate Type** determines how each of the selected services should be prorated and then posted to the Client’s record.

Options include:

- “Prorate Evenly”, which divides one post evenly by the number of services selected.
- “Post Full Quantity for Each Service” will post one full service for each of the selected services.
- And “Enter Quantity for Each Service” will prompt the User to manually enter the quantity for each service at the time of reservation or check-in. (Select Prorate Evenly.)

If a **Pre-Requisite Service** is selected, the Client will not be able to be reserved or check into this Usage if they do not have the selected service record previously recorded.

Next is **Automatic Check-In** which is used for Usages where the Client’s reservation spans over multiple days.

When selected, an automatic batch process will run overnight to check the Client in for each night of their reservation. This keeps the User from having to record the check-ins manually each day.

 If "Automatic Check-In" is selected, enrolled clients will automatically be re-checked in at each defined interval indicated in the recurrence. If "Include Dates Between" is checked, when clients are checked in, they will be checked in from the date of the selected check-in until the date of the next scheduled check-in interval.

Automatic Check-In

**Recurrence** sets when the Usage is available.

A Usage for a “Classroom” Resource is most often run on a weekly basis with a begin and end time.

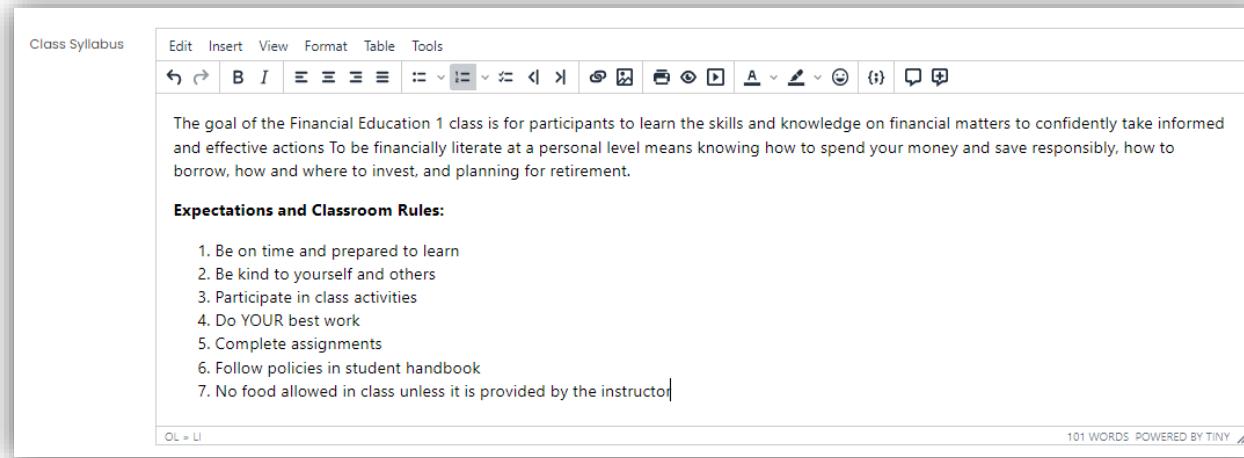
When entering time, use military standard as there are no options for AM or PM.

 Recurrence Start/End times must be in military time i.e. 12 midnight is 00:00, 1 pm is 13:00. Single-digit times must have a leading zero, i.e. 9 am is 09:00.

Recurrence  Daily  Weekly  Monthly

Day	Start	End	All Day
<input type="checkbox"/> Sunday	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> All Day
<input checked="" type="checkbox"/> Monday	18:00	19:30	<input type="checkbox"/> All Day
<input type="checkbox"/> Tuesday	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> All Day
<input checked="" type="checkbox"/> Wednesday	18:00	19:30	<input type="checkbox"/> All Day
<input type="checkbox"/> Thursday	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> All Day
<input type="checkbox"/> Friday	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> All Day
<input type="checkbox"/> Saturday	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> All Day

Class Syllabus provides a space to add any relevant information about the course to be shared with Users on a Client portal, such as a syllabus that provides details about the content of the course, learning objectives, and expectations.



The goal of the Financial Education 1 class is for participants to learn the skills and knowledge on financial matters to confidently take informed and effective actions. To be financially literate at a personal level means knowing how to spend your money and save responsibly, how to borrow, how and where to invest, and planning for retirement.

**Expectations and Classroom Rules:**

1. Be on time and prepared to learn
2. Be kind to yourself and others
3. Participate in class activities
4. Do YOUR best work
5. Complete assignments
6. Follow policies in student handbook
7. No food allowed in class unless it is provided by the instructor

OL = LI      101 WORDS. POWERED BY TINY

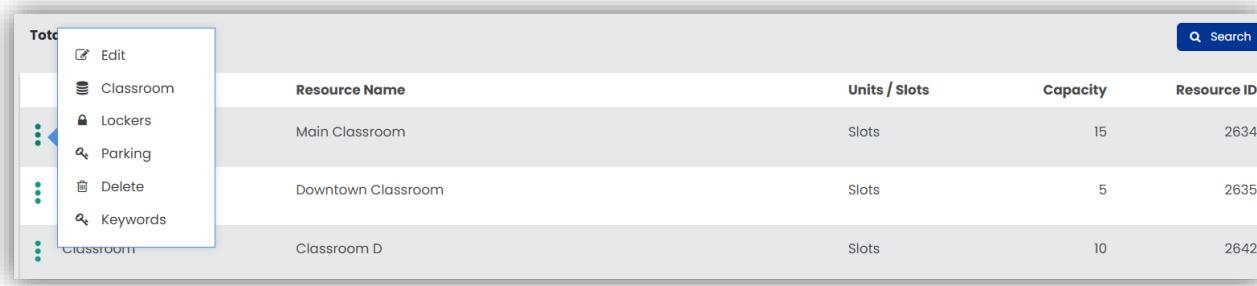
SAVE the new Resource Usage.

## Lockers

After the Resource Usages are created, you have the option to also add Lockers and Parking.

Let's start with lockers.

Once lockers are created, they can be associated with specific Usage slots or assigned to Clients.



Resource Name	Units / Slots	Capacity	Resource ID
Main Classroom	Slots	15	2634
Downtown Classroom	Slots	5	2635
Classroom D	Slots	10	2642

Off the Resource menu, select Lockers.

A list of existing lockers for the Resource is displayed, including the locker's name, availability, and if it is handicap accessible.

Each locker is added individually. To start, select ADD ROW.

The screenshot shows a table with columns: Locker Name\*, Status\*, Handicap, and Type. All rows show 'Available' in the Status column, 'No' in the Handicap column, and 'Lockers' in the Type column. The rows are numbered 1 through 5. The 'Add Row' button is at the top right, and the 'Save' and 'Cancel' buttons are at the bottom right.

Locker Name*	Status*	Handicap	Type
✓ Locker A1	Available	Yes	Lockers
✓ Locker A2	Available	No	Lockers
✓ Locker A3	Available	No	Lockers
✓ Locker A4	Available	No	Lockers
✓ Locker A5	Available	No	Lockers

Give the locker a name.

Select the **Status** of the locker, which is essentially its availability. Options include “Assigned”, “Available”, “In Development”, and “Under Repair”.

Then indicate if the locker is handicap accessible.

The **Type** is automatically set to “Lockers” by default.

Continue to add lockers as needed.

Select a record to make any necessary changes or click the X to delete the locker.

The screenshot shows the same table as above, but the first row ('Locker A1') is highlighted with a red border. The 'Edit' icon in the first column of the row is highlighted with a red circle. The 'Save' and 'Cancel' buttons are at the bottom right.

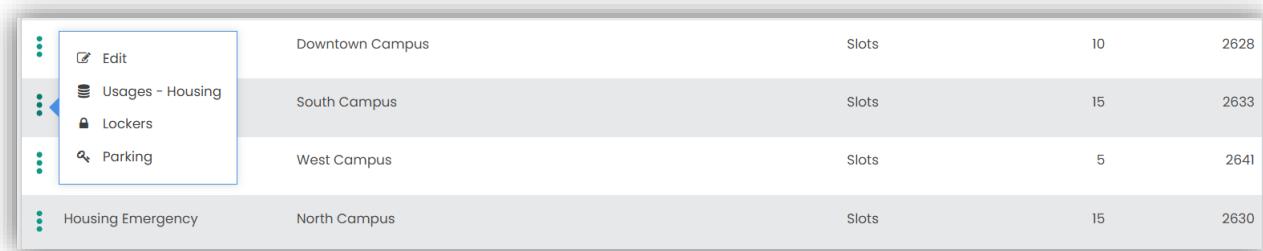
Locker Name*	Status*	Handicap	Type
✓ Locker A1	Available	<input checked="" type="checkbox"/>	Lockers
✓ Locker A2	Available	No	Lockers
✓ Locker A3	Available	No	Lockers
✓ Locker A4	Available	No	Lockers
✓ Locker A5	Available	No	Lockers

Click SAVE when done.

## Parking

You can also add parking spaces for this Resource, which is like adding lockers.

Once parking spaces are created, they can be associated with specific Usage slots or assigned to Clients.



Downtown Campus	Slots	10	2628
South Campus	Slots	15	2633
West Campus	Slots	5	2641
Housing Emergency	Slots	15	2630

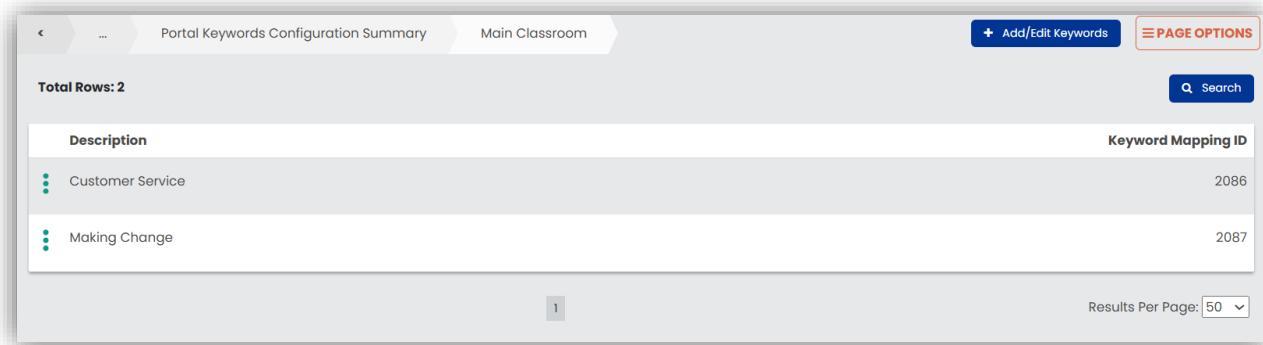
Off the Resource menu, select Parking.

A list of existing parking spaces for the Resource is displayed, including the parking space name, availability, and if it is handicap accessible.

## Keywords

Keywords can be assigned to a Classroom Usage, which allow for filtering and ease of searching for a specific class.

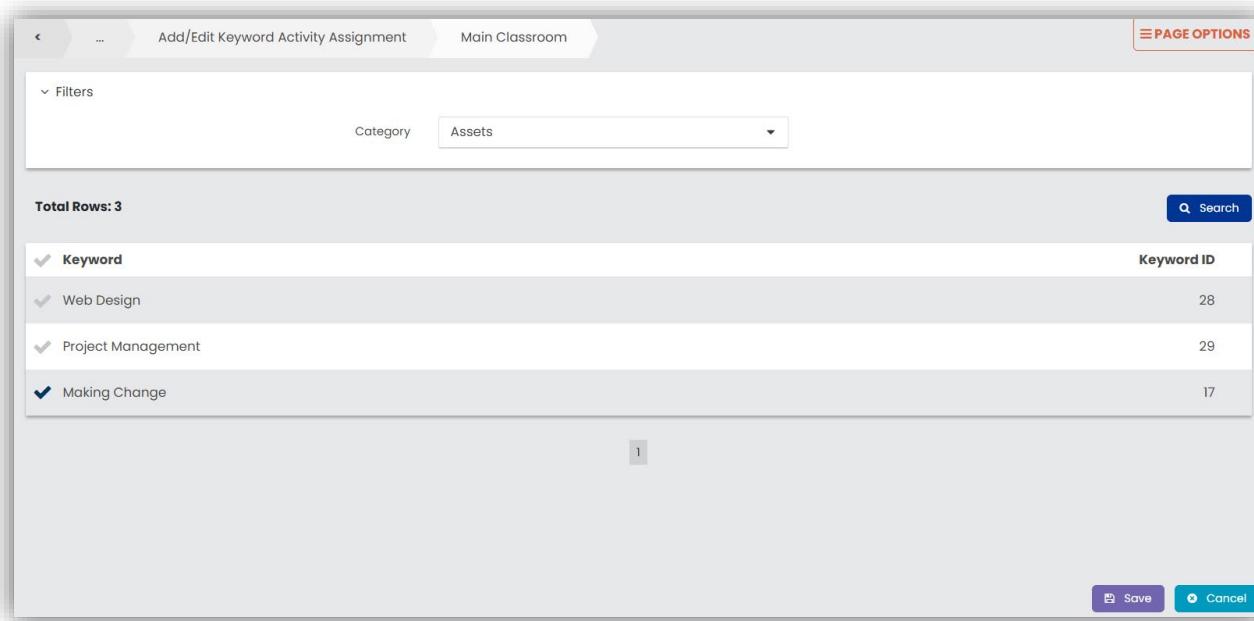
Keywords are managed in Codes and Categories.



Description	Keyword Mapping ID
Customer Service	2086
Making Change	2087

Select ADD/EDIT KEYWORDS.

Use **Category** to filter the list.



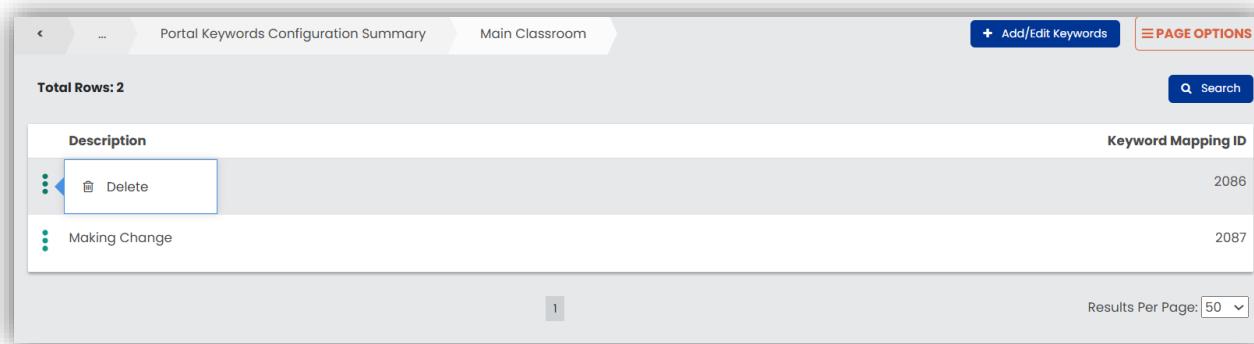
**Total Rows: 3**

Keyword	Keyword ID
Web Design	28
Project Management	29
Making Change	17

**Save**   **Cancel**

Select the checkmark to the left of the Keyword to select it. Or click the X to the right of the record to deselect it.

When done adding or removing keywords for the Usage, select SAVE.



**Total Rows: 2**

Description	Keyword Mapping ID
Making Change	2087

**Delete**

Results Per Page: 50

Select Delete off the record's menu to remove the keyword from the Usage.

## Usage Menu

We have created our Resource and its first Usage, including lockers and parking spots. Let's now move over to the Usage menu.

The menu provides multiple options. And like the Resource menu, this menu is static and the options change depending on the Resource and Usage Category and Type.

Attendance Service	Program Name	Start - End Date	Enrollment Type	Event Location Name	Capacity	Enrolled Today	Usage ID
		11/1/2022 - 11/30/2022	Required/Auto Enrollment		15	0	6559
Adult Education	Family Literacy	3/1/2025 - Open	Required/Auto Enrollment		15	0	6589

## Slot Inventory

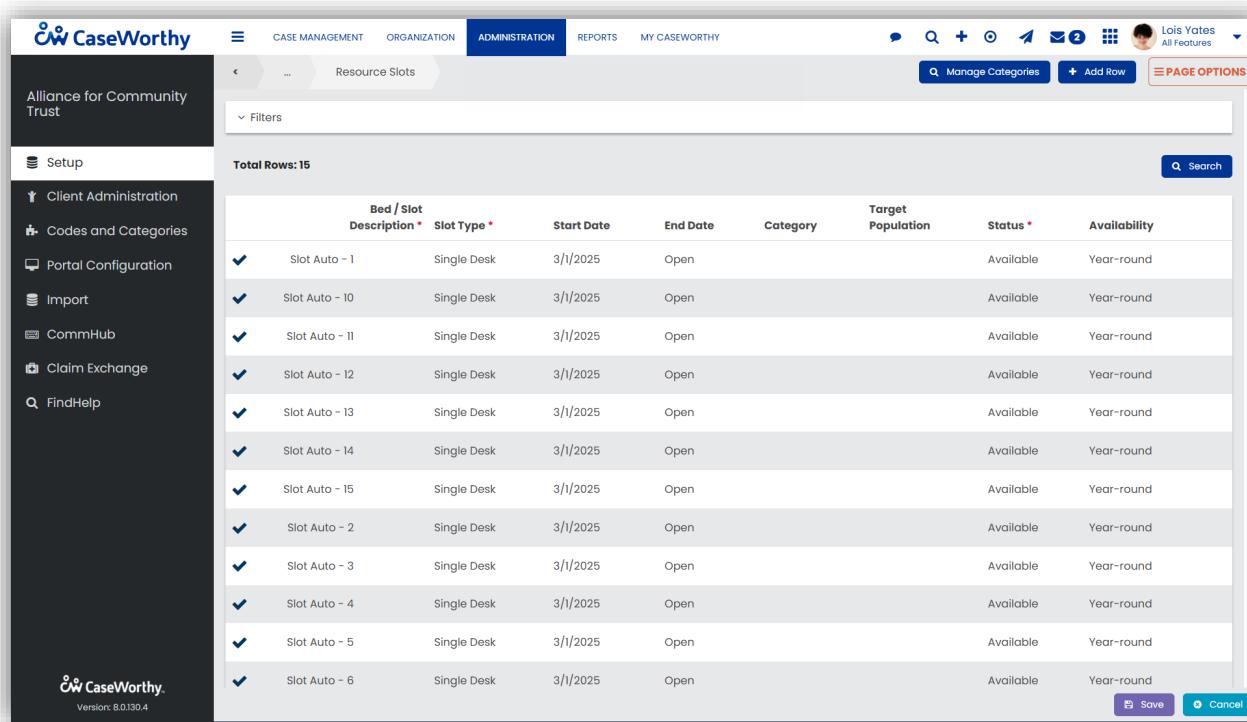
The next most logical step is to set up the Usage's slots. Slots can be created and managed using either Slot Inventory or the Class Room Designer. We will explore Slot Inventory in this example.

Once the slots are created, we will start back at the top of the Usage menu and explore the other options.

There are a few important notes about slots:

- Reservations for the “Classroom” Resource cannot occur until slots are created for the Usage.
- If the Resource was configured to create slots during setup, slot creation occurs automatically when the Usage is saved and is based on the capacity entered.
- In a Classroom, the number of desks or seats are typically limited, therefore slots are most likely assigned to Clients at reservation rather than at check-in.

In the Usage menu, select Slot Inventory.



Bed / Slot Description *	Slot Type *	Start Date	End Date	Category	Target Population	Status *	Availability
Slot Auto - 1	Single Desk	3/1/2025	Open			Available	Year-round
Slot Auto - 10	Single Desk	3/1/2025	Open			Available	Year-round
Slot Auto - 11	Single Desk	3/1/2025	Open			Available	Year-round
Slot Auto - 12	Single Desk	3/1/2025	Open			Available	Year-round
Slot Auto - 13	Single Desk	3/1/2025	Open			Available	Year-round
Slot Auto - 14	Single Desk	3/1/2025	Open			Available	Year-round
Slot Auto - 15	Single Desk	3/1/2025	Open			Available	Year-round
Slot Auto - 2	Single Desk	3/1/2025	Open			Available	Year-round
Slot Auto - 3	Single Desk	3/1/2025	Open			Available	Year-round
Slot Auto - 4	Single Desk	3/1/2025	Open			Available	Year-round
Slot Auto - 5	Single Desk	3/1/2025	Open			Available	Year-round
Slot Auto - 6	Single Desk	3/1/2025	Open			Available	Year-round

Each automatically generated slot for this Usage displays, including the identifying description, type, availability, and status based on our selections.

Remember, these slots were automatically created because the Resource **Slot Setup Type** was set to “Slots Created During Setup”.

The MANAGE CATEGORIES button at the top can be used to create categories to be assigned for each slot. These are used for sorting and reporting purposes and do not affect functionality.

You can also use ADD ROW to add a new slot.

Since we have a list of automated slots, instead of adding a new record, we will focus on editing one of the existing slots.

Bed / Slot Description *	Slot Type *	Start Date	End Date	Category	Target Population	Status *	Availability
Front Row, Desl	Single Desk	03/01/2025	Open	<input checked="" type="checkbox"/> Chair <input checked="" type="checkbox"/> Desk <input type="checkbox"/> Open Room <input type="checkbox"/> Private <input type="checkbox"/> Semi-Private		Available	Year-round
Locker	<input type="text"/>		Is Accessible?	<input checked="" type="checkbox"/>	Has Electric Outlet?	<input type="checkbox"/>	
Parking	<input type="text"/>						
Sort Order	<input type="text"/>						

Select the first record.

The **Bed/Slot Description** is the identifier used to differentiate the slot from other slots.

**Slot Type** can be changed to better describe the slot if necessary. Examples are “Single Desk” and “Double Desk”.

**Start Date** and **End Date** identify when the slot is available. The dates can be updated, as necessary. Use the star icon to indicate if the end date should remain “Open”.

**Category** is a multi-select that can be assigned to the slot for filtering forms and reports. The items available here are added through MANAGE CATEGORIES.

**Target Population** defaults to what was selected during Usage setup and identifies if the slot is reserved for certain populations. It can be changed here if needed.

**Status** identifies if the slot is assigned, available, in development, or under repair. The slot is set to “Available” by default but can be changed as needed.

**Availability** is used to identify if the slot is open all year, is just used for overflow, or is offered seasonally. It is set to “Year-round” by default but can be changed.

If this slot has a locker or a parking space, use the lookup icons for each to search for availability and assign as needed. A specific locker or parking space can also be assigned at the time of reservation or check-in.

**Is Accessible?** and **Has Electric Outlet?** indicate if the slot is handicap accessible and if it has an electrical outlet available.

**Rent Amount** is used to note the rental cost for the slot. The amount can be zero dollars but is required.

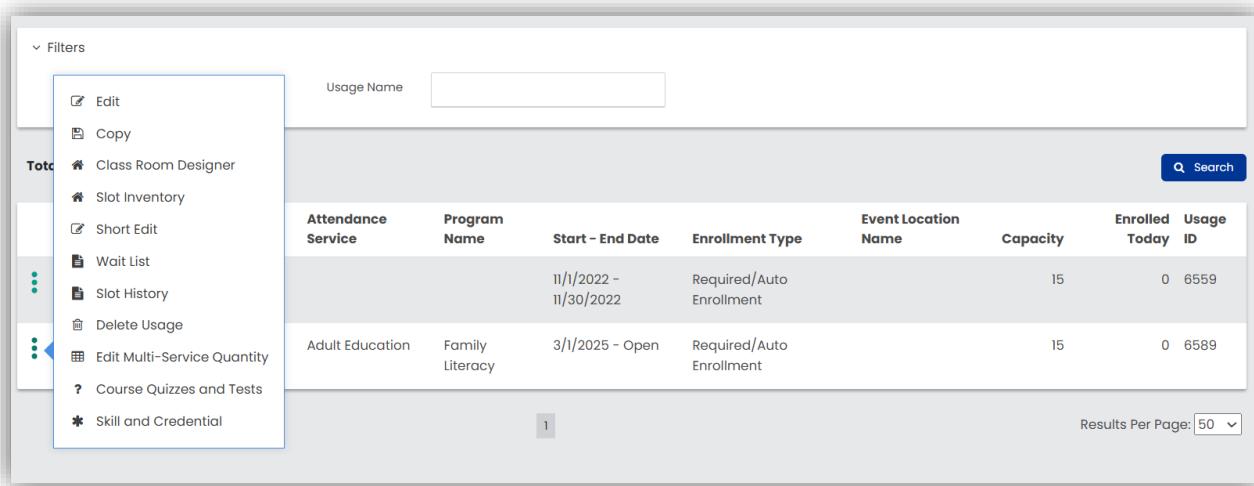
**Sort Order** determines how the slot appears on forms in relation to the other slots. This field is not required.

Bed / Slot Description *	Slot Type *	Start Date	End Date	Category	Target Population	Status *	Availability
✓ Row I, Desk 1	Single Desk	3/1/2025	Open			Available	Year-round
✓ Row I, Desk 2	Single Desk	3/1/2025	Open			Available	Year-round
✓ Row I, Desk 3	Single Desk	3/1/2025	Open			Available	Year-round
✓ Row I, Desk 4	Single Desk	3/1/2025	Open			Available	Year-round

When all slots are configured appropriately, **SAVE** the form.

## Edit

Let's open the Usage menu again and review the other options available, starting at the top.

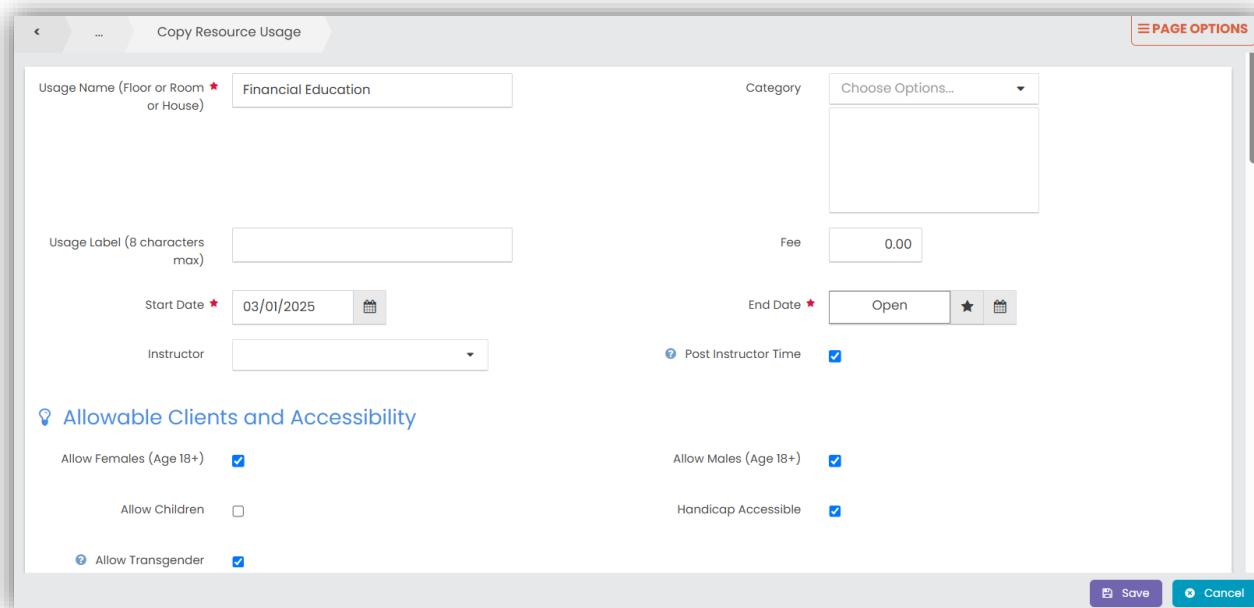


The screenshot shows the CaseWorthy software interface. On the left, a vertical sidebar displays a list of menu items under 'Totals' and 'Usage'. The 'Edit' option is highlighted with a blue box. At the top right, there is a search bar labeled 'Usage Name' and a 'Search' button. Below the search bar, a table lists usage details. The table has columns: Attendance Service, Program Name, Start - End Date, Enrollment Type, Event Location Name, Capacity, Enrolled Today, and Usage ID. There are two rows of data: one for 'Required/Auto Enrollment' with a capacity of 15 and an ID of 6559, and another for 'Required/Auto Enrollment' with a capacity of 15 and an ID of 6589. At the bottom right of the table area, there is a 'Results Per Page' dropdown set to 50.

Use Edit to change details about the initial Usage setup, including the name, effective dates, and capacity.

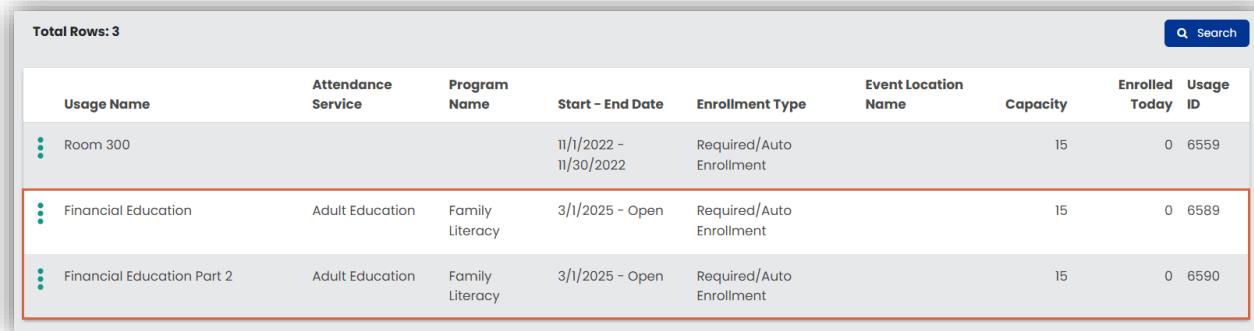
## Copy

Copy is unique to Classroom Resource Usages and allows you to quickly create a new Usage with the same details as the selected Usage.



The screenshot shows the 'Copy Resource Usage' dialog box. The 'Usage Name (Floor or Room or House)' field contains 'Financial Education'. The 'Category' dropdown is set to 'Choose Options...'. The 'Fee' field shows '0.00'. The 'Start Date' is '03/01/2025'. The 'End Date' is set to 'Open'. The 'Instructor' dropdown is empty. Under 'Allowable Clients and Accessibility', 'Allow Females (Age 18+)' and 'Allow Males (Age 18+)' are checked, while 'Allow Children' and 'Handicap Accessible' are unchecked. 'Allow Transgender' is checked. At the bottom are 'Save' and 'Cancel' buttons.

Make revisions as needed and then SAVE.



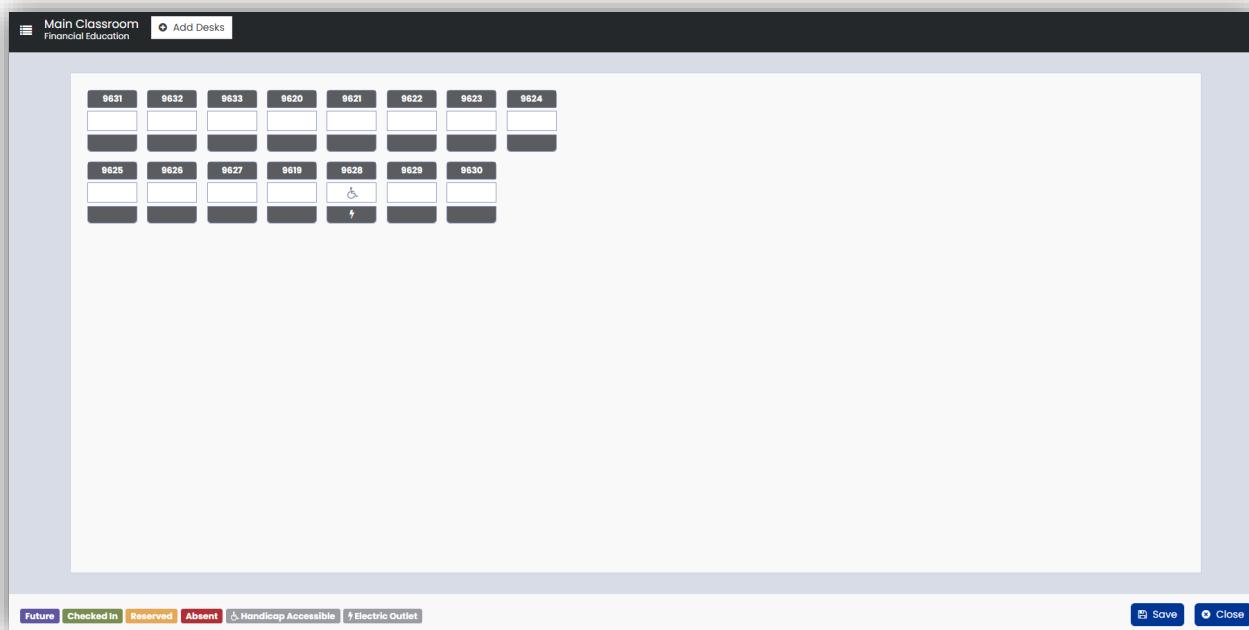
Total Rows: 3									
Usage Name	Attendance Service	Program Name	Start - End Date	Enrollment Type	Event Location Name	Capacity	Enrolled Today	Usage ID	
Room 300			11/1/2022 – 11/30/2022	Required/Auto Enrollment		15	0	6559	
Financial Education	Adult Education	Family Literacy	3/1/2025 – Open	Required/Auto Enrollment		15	0	6589	
Financial Education Part 2	Adult Education	Family Literacy	3/1/2025 – Open	Required/Auto Enrollment		15	0	6590	

Now the new class displays. The slots were also automatically generated, and reservations can be entered.

This is a fast and efficient method for creating multiple similar classes without starting from nothing.

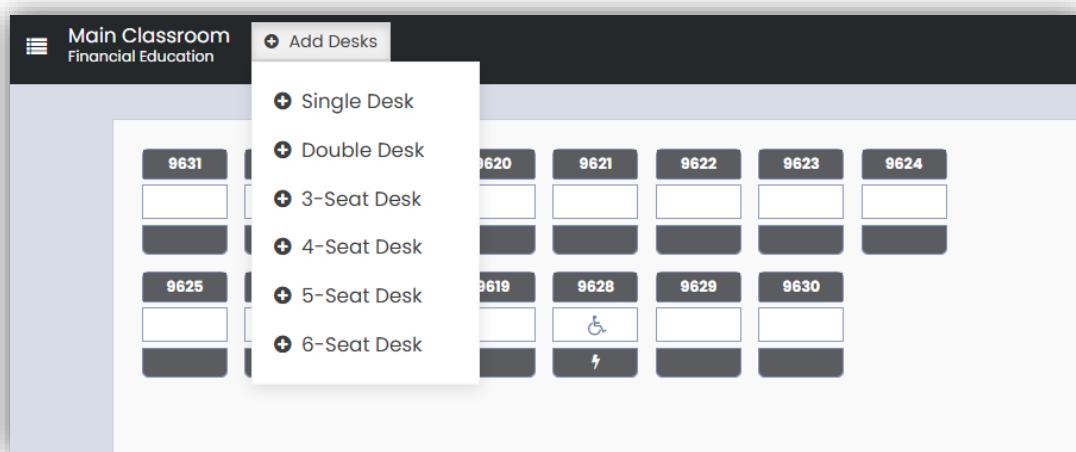
## Class Room Designer

Like Slot Inventory, the Class Room Designer can also be used to set up Usage slots. But, instead of a list of slots, the designer is a graphical representation of the slots available.

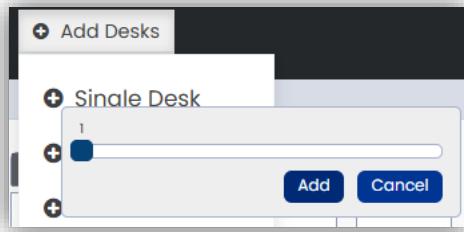


The slots displayed here were automatically generated based on the Usage capacity entered during setup.

Use ADD DESKS to add slots within the Room Designer, including single desks, double desks, and more.



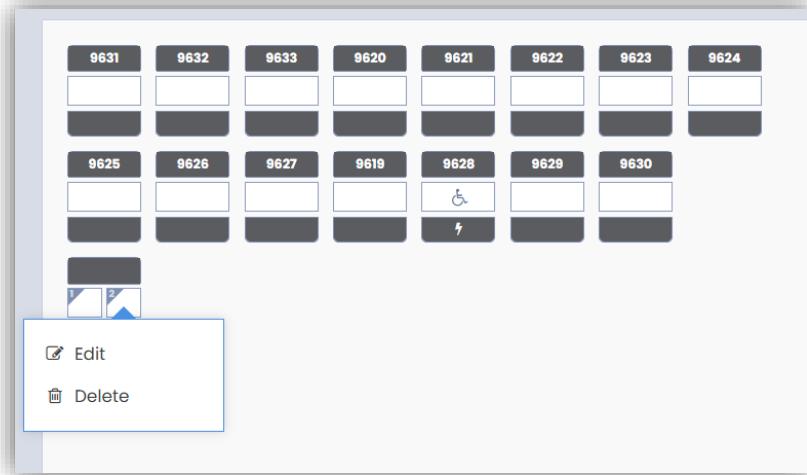
When you select the desk option, you are then prompted to select how many desks to add. Use the slider, and then select ADD.



The Class Room Designer then updates to reflect the initial inventory plus the newly added slot. The double desk option creates two slots that will appear together.



Select any slot to reveal its menu. Choose Delete to delete the slot or select Edit to update its details.



In the *Edit* window, you can update the slot's availability, name, status, accessibility, and more.

### Edit

Edit slot

Slot ID (5 Characters)

Start Date  

End Date   

Slot Name \*

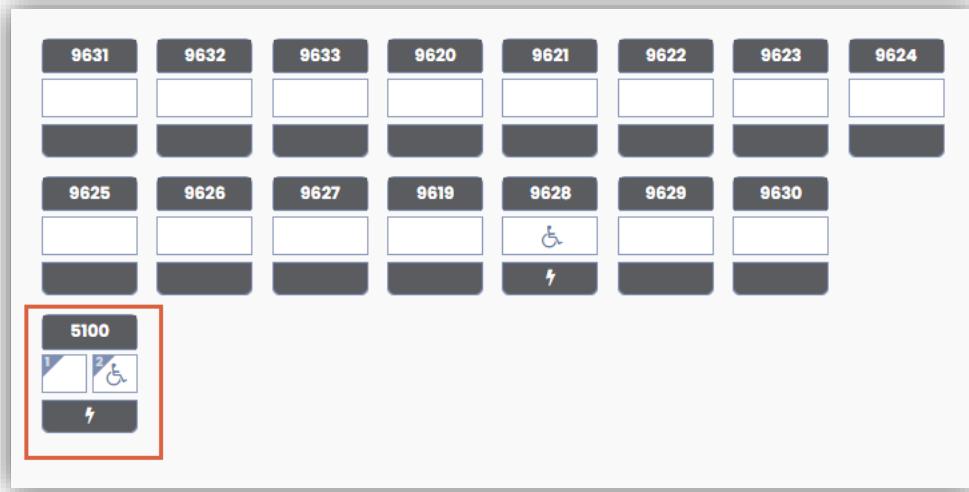
Status \*  Randomizer Type

? Electrical Outlet / Handicap Accessible - Select to indicate the visual cue in the bed management system.

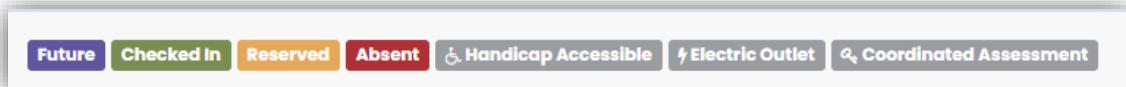
Electrical Outlet Available?  Handicap Accessible?

 Save  Cancel

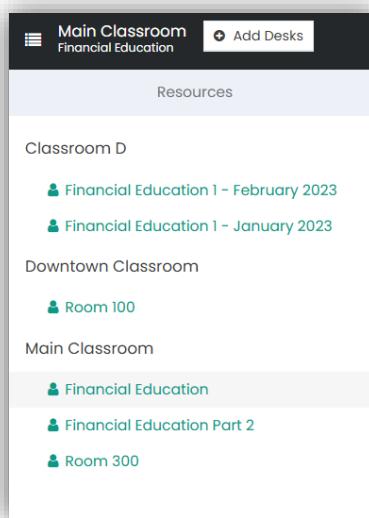
Notice now, the slot ID has been updated to “5100” and the slot also displays icons indicating it is handicap accessible and has an electrical outlet.



There is also a legend at the bottom of the Room Designer that helps you identify which slot has a particular feature. The status of the slot applies in case management.



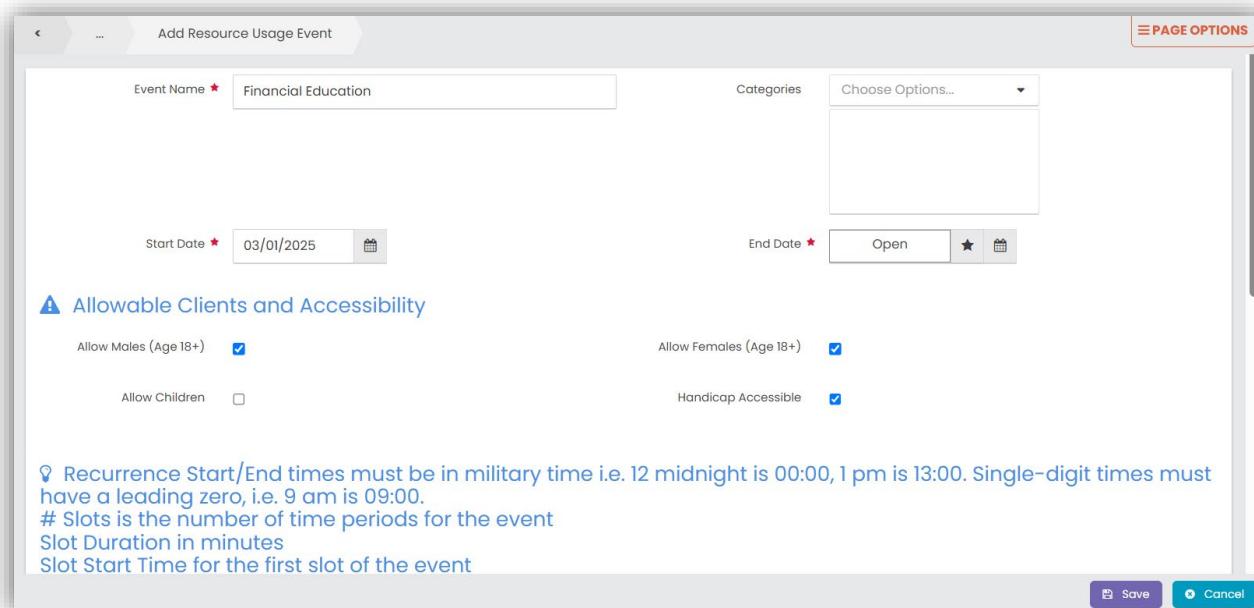
The View Resources menu in the top left corner allows you to quickly access the Class Room Designer for the Provider’s other Resources.



Select SAVE to record the slot inventory changes.

## Short Edit

Short Edit allows for quickly editing key details about the Usage, including the Usage name, category, dates, allowable Clients, accessibility, and recurrence.

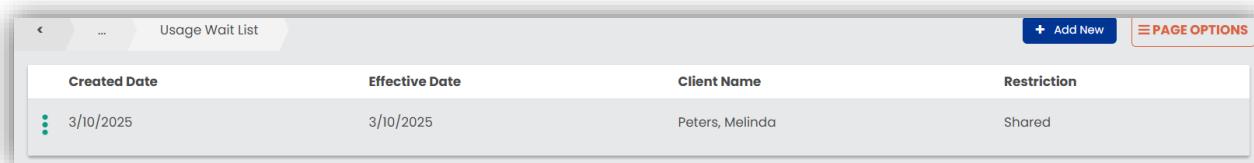


The screenshot shows the 'Add Resource Usage Event' form. At the top, there are fields for 'Event Name' (Financial Education), 'Categories' (Choose Options...), and date/time fields for 'Start Date' (03/01/2025) and 'End Date' (Open). Below these are sections for 'Allowable Clients and Accessibility'. Under 'Allowable Clients', there are four checkboxes: 'Allow Males (Age 18+)' (checked), 'Allow Females (Age 18+)' (checked), 'Allow Children' (unchecked), and 'Handicap Accessible' (checked). A note at the bottom left explains that recurrence times must be in military time. At the bottom right are 'Save' and 'Cancel' buttons.

## Wait List

A Wait List can be used to maintain a register of Clients waiting for a reservation.

This list displays all Clients waiting for a reservation and can be accessed at any time.

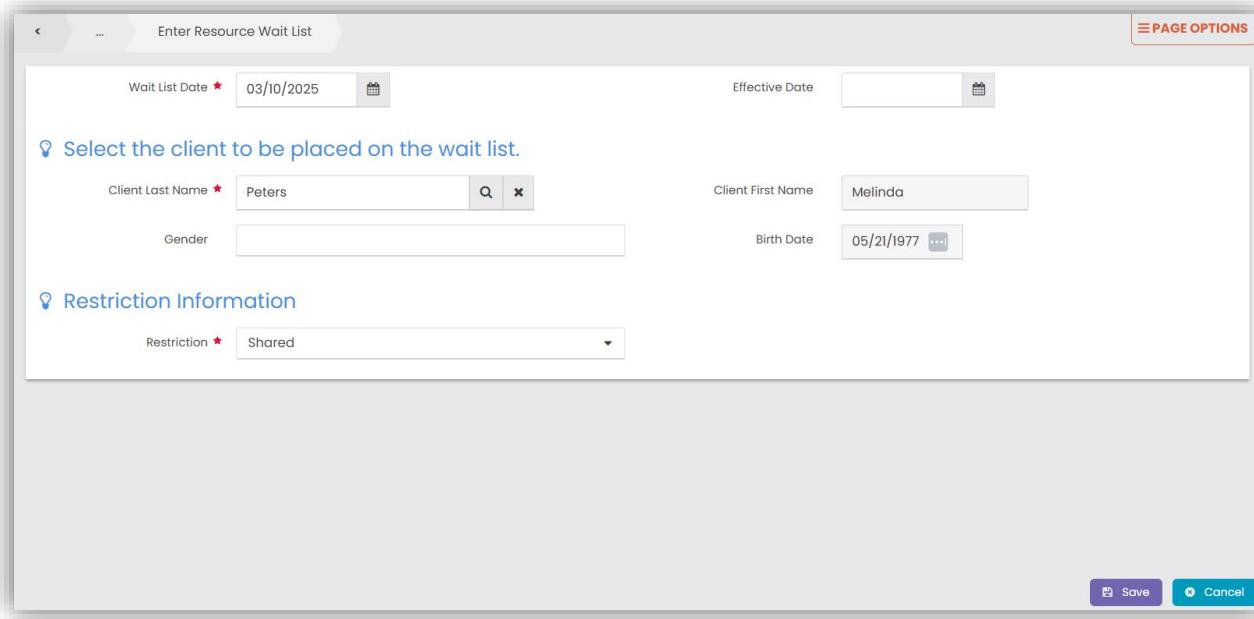


The screenshot shows the 'Usage Wait List' table. It has four columns: 'Created Date', 'Effective Date', 'Client Name', and 'Restriction'. There is one row of data: 'Created Date' is 3/10/2025, 'Effective Date' is 3/10/2025, 'Client Name' is Peters, Melinda, and 'Restriction' is Shared. At the top right of the table is a '+ Add New' button.

For example, if all desks are reserved for the month of December and you would like to maintain a record of Clients that would like to take over the reservation if one becomes available. This is used for reference purposes only and does not work with other functionality.

Use ADD NEW to include a Client on the waitlist.

Enter the appropriate details, including the date of the request and the Client's name.



Wait List Date **\*** 03/10/2025

Effective Date

Select the client to be placed on the wait list.

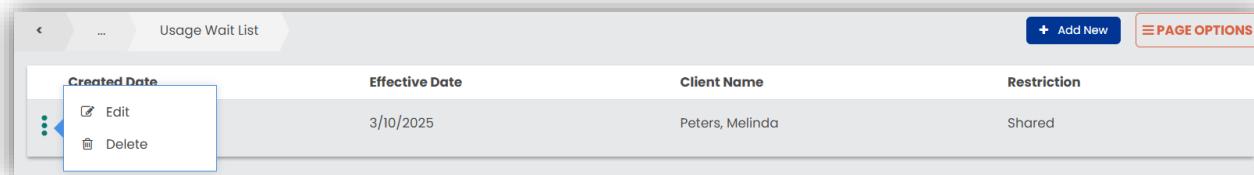
Client Last Name <b>*</b>	Peters	<input type="button" value="Search"/> <input type="button" value="X"/>	Client First Name	Melinda	
Gender				Birth Date	05/21/1977 <input type="button" value="Calendar"/>

Restriction Information

Restriction **\*** Shared

Select SAVE when done.

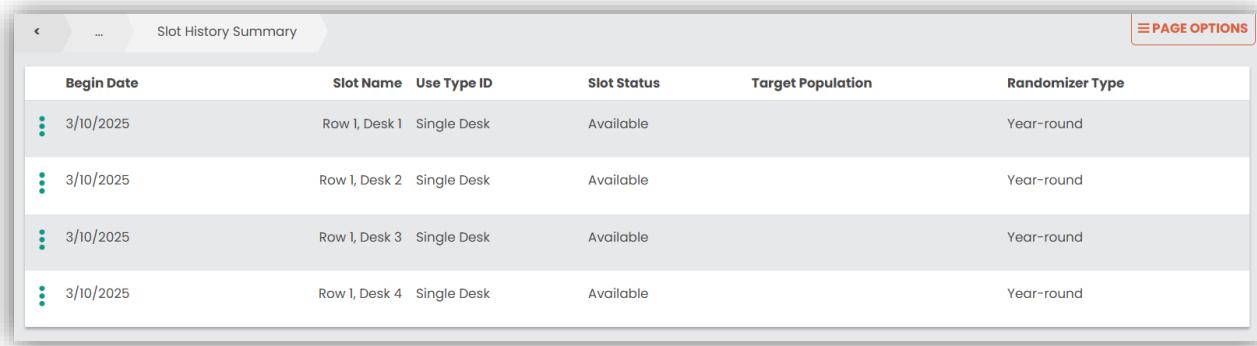
From the record's menu, select Edit to update the details of the request, or use Delete to remove the Client from the waiting list.



Created Date	Effective Date	Client Name	Restriction
<input checked="" type="checkbox"/> Edit <input type="checkbox"/> Delete	3/10/2025	Peters, Melinda	Shared

## Slot History

Slot History displays a summary of changes that have been made to the slots for this Usage.



Begin Date	Slot Name	Use Type ID	Slot Status	Target Population	Randomizer Type
3/10/2025	Row 1, Desk 1	Single Desk	Available		Year-round
3/10/2025	Row 1, Desk 2	Single Desk	Available		Year-round
3/10/2025	Row 1, Desk 3	Single Desk	Available		Year-round
3/10/2025	Row 1, Desk 4	Single Desk	Available		Year-round

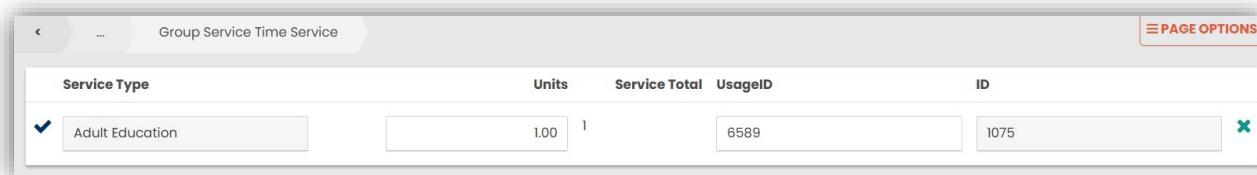
The details for each slot are displayed, and each slot can be edited or deleted from its menu as needed.

## Delete Usage

Delete Usage removes the Usage from the Resource. If the Usage has already been reserved or checked into, the Delete option is no longer available on the menu.

## Edit Multi-Service Quantity

Edit Multi-Service Quantity is used to edit aspects of the services to be posted for the Usage.



Service Type	Units	Service Total	UsageID	ID
✓ Adult Education	1.00	1	6589	1075 ✕

The services that were assigned during setup for this Usage are displayed, including the description and the number of units that are posted.

This is especially beneficial if this Resource was set up to post multiple services. And, if a **Prorate Type** was set when configuring the Resource, the number of **Units** to be posted for each service for this Usage can be updated on this form.

Select a record to change the number of service **Units** that will be recorded for the Client. Or use the X to delete the service. If deleted, the service will no longer be posted to the Client's record for this Resource Usage. It will remain on the other Usages for this Resource.

It is important to note that new services cannot be added here. Additional services must be added using the *Edit Resource Usage* form.

## Course Quizzes and Tests

Course Quizzes and Tests is used to schedule tests and other assessments for the selected Usage or class.

Click ADD ROW to create a new one.

### Course Quizzes and Tests

Course Quizzes and Tests

+ Add Row
PAGE OPTIONS

Total Rows: 1

Date *	Test Type *	Course Test Type	Max Score	Weight *
<input checked="" type="checkbox"/> 3/21/2025	Life Skills Quiz	Quiz	100	25
SUM : 25.00%				

1

Save
Cancel

Select the **Date** for when the test should occur.

The **Test Type** sets the type of test or assessment being scheduled.

Options can include a specific subject like Math or History but can also include other items such as Job Search and Interview Skills. The test types displayed are set in Codes and Categories.

### Course Quizzes and Tests

Course Quizzes and Tests

+ Add Row
PAGE OPTIONS

Total Rows: 1

Date *	Test Type *	Course Test Type	Max Score	Weight *
<input checked="" type="checkbox"/> 04/11/2025 	Life Skills Quiz 	Quiz 	100	25 
<input checked="" type="checkbox"/> 04/04/2025 	Life Skills Quiz 	Quiz 	100	25 
<input checked="" type="checkbox"/> 03/28/2025 	Life Skills Quiz 	Quiz 	100	25 
<input checked="" type="checkbox"/> 3/21/2025	Life Skills Quiz	Quiz	100	25
SUM : 100.00%				

**Course Test Type** is the type of test the Client will take on this date. Options include “Quiz”, “Test”, “Exam”, “Mid-term”, “Final”, and “Other”.

For **Max Score**, enter the total number of points the Client can score for this test.

**Weight** is the percentage for how much the selected test counts towards the final grade for the class. The column must not exceed 100%, but can be lower than 100%, which allows for adding additional tests later. Since there are four quizzes total for this example, each quiz is set to “25”.

### Course Quizzes and Tests

Course Quizzes and Tests
+ Add Row
PAGE OPTIONS

Total Rows: 4

Date *	Test Type *	Course Test Type	Max Score	Weight *
✓ 3/21/2025	Life Skills Quiz	Quiz	100	25
✓ 3/28/2025	Life Skills Quiz	Quiz	100	25
✓ 4/4/2025	Life Skills Quiz	Quiz	100	25
✓ 4/11/2025	Life Skills Quiz	Quiz	100	25

SUM : 100.00%

1
Save
Cancel

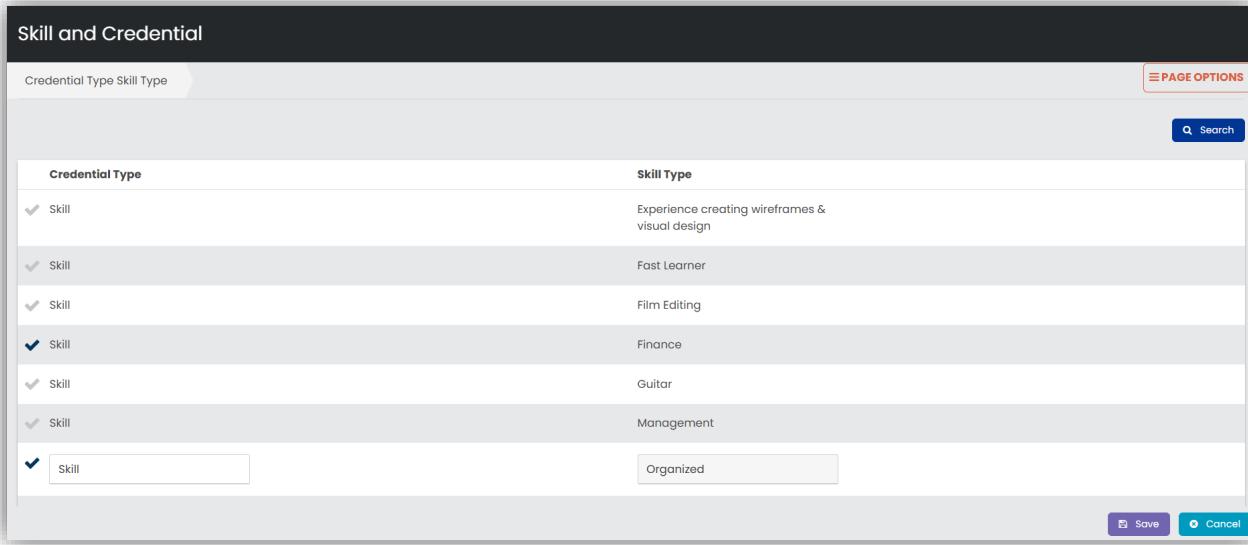
Add all applicable tests and be mindful of the **Weight** total not exceeding 100%.

When done, **SAVE** the form.

Once saved, select a quiz to make updates, or use the X to the right of the record to delete.

## Skill and Credential

The last item on the menu is Skill and Credential. The credentials selected here will be added to the Client's record in an automated overnight process once the class is completed with a passing grade. The list of skills and credentials is maintained in Codes and Categories.



Credential Type	Skill Type
✓ Skill	Experience creating wireframes & visual design
✓ Skill	Fast Learner
✓ Skill	Film Editing
✓ Skill	Finance
✓ Skill	Guitar
✓ Skill	Management
<input checked="" type="checkbox"/> Skill	Organized

Select the skills and credentials that apply to this class Usage and then SAVE the form.

Once saved, select additional skills as necessary, or use the X to the right of the record to remove a skill from the class Usage.

# Classroom Case Management

With the "Classroom" Resource and its Usages now set up, the next step is to focus on the Case Management side. Reservations and check-ins can be managed from both the Organization tab and the Case Management tab.

The Organization tab provides access to the Resource for any Client within the selected Organization. The Entity Corner displays the Organization currently selected.

The Case Management tab also provides access to the Resource for any Client within the selected Organization but also allows you to view and manage a Client's classwork, assign lockers and parking spaces to the Client, view the Client's appointment calendar, view a list of suggested classes for the Client, and access the Client's class and housing history.

Let's begin by exploring the Organization tab.

## Organization Tab

### Navigation Organization tab: Organization Dashboard

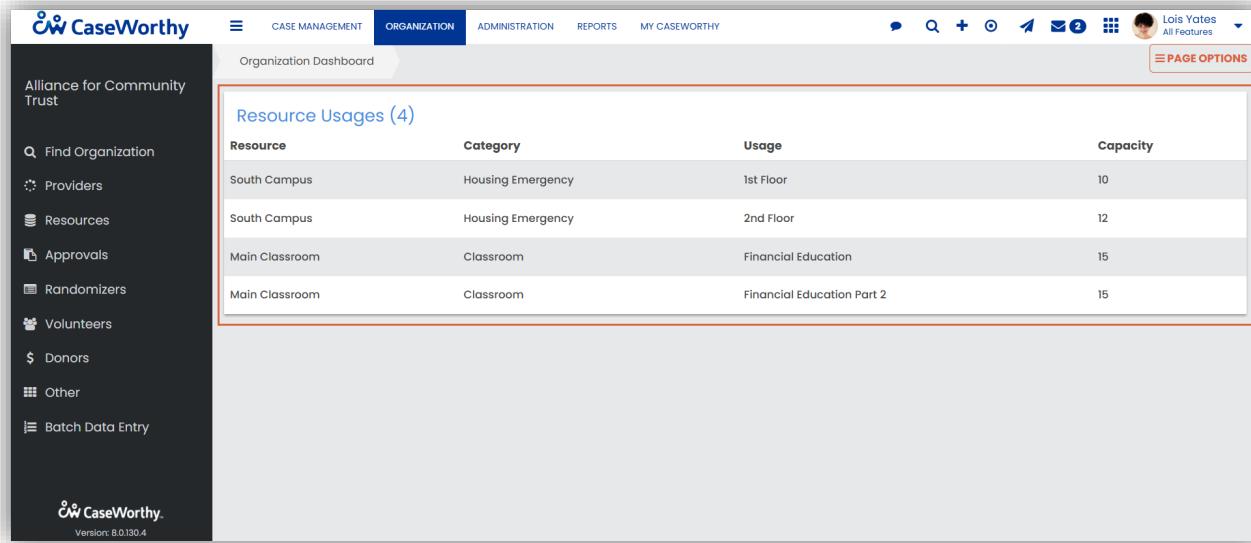
The *Organization Dashboard* displays as the default landing page when you access the Organization tab. Before continuing, ensure the correct Organization is displayed in the Entity Corner.

The screenshot shows the CaseWorthy application interface. The top navigation bar includes links for CASE MANAGEMENT, ORGANIZATION (which is highlighted in blue), ADMINISTRATION, REPORTS, and MY CASEWORTHY. The Entity Corner on the left shows 'Alliance for Community Trust'. The main content area is titled 'Organization Dashboard' and displays a table titled 'Resource Usages (4)'. The table has columns for Resource, Category, Usage, and Capacity. The data is as follows:

Resource	Category	Usage	Capacity
South Campus	Housing Emergency	1st Floor	10
South Campus	Housing Emergency	2nd Floor	12
Main Classroom	Classroom	Financial Education	15
Main Classroom	Classroom	Financial Education Part 2	15

At the bottom left, there is a sidebar with icons for Find Organization, Providers, Resources, Approvals, Randomizers, Volunteers, Donors, Other, and Batch Data Entry. The bottom right corner shows the user profile 'Lois Yates All Features' and a 'PAGE OPTIONS' button.

The **Resource Usages** query widget is displayed and lists all active Resources for the selected Organization. Each **Resource** includes its name, Resource **Category**, the **Usage** name, and its maximum capacity.



The screenshot shows the CaseWorthy software interface. The top navigation bar includes links for CASE MANAGEMENT, ORGANIZATION (which is highlighted in blue), ADMINISTRATION, REPORTS, and MY CASEWORTHY. The top right corner shows a user profile for Lois Yates and a PAGE OPTIONS button. The main content area is titled "Organization Dashboard". A table titled "Resource Usages (4)" is displayed, listing four resources: South Campus, Main Classroom, and two entries for Main Classroom. The columns are labeled: Resource, Category, Usage, and Capacity. The data is as follows:

Resource	Category	Usage	Capacity
South Campus	Housing Emergency	1st Floor	10
South Campus	Housing Emergency	2nd Floor	12
Main Classroom	Classroom	Financial Education	15
Main Classroom	Classroom	Financial Education Part 2	15

The left sidebar contains a navigation menu with links: Find Organization, Providers, Resources, Approvals, Randomizers, Volunteers, Donors, Other, and Batch Data Entry. The CaseWorthy logo and version information (Version: 8.0.30.4) are at the bottom of the sidebar.

Notice the new Classroom Resource includes two Usages, the original Usage created from the example, and the Copy we created for part 2 of the course.

Also notice how the Resource “Main Classroom” is listed twice in the grid because it has two Usages. There is one row for each Usage: “Financial Education” and “Financial Education Part 2”.

## Provider Resources Form

Select the widget to open the *Provider Resources* form.

The screenshot shows the 'Provider Resources' form interface. At the top, there is a header bar with a back arrow, a 'Provider Resources' title, and a 'PAGE OPTIONS' button. Below the header is a 'Filters' section with a dropdown menu set to 'Category' and 'Classroom'. A note states: '⚠ Resources that do not have Usages cannot access the Action Gear menu. Please add a Usage to the Resource if you need access to those options.' To the right of the filters are 'Resource' and 'Search' input fields. Below the filters is a table header with columns: Resource, Resource Type, Usage, Capacity / Units, Enrolled Today, Usage Start Date, Enrollment Type, Resource ID, and Usage ID. The table contains five rows of data:

Resource	Resource Type	Usage	Capacity / Units	Enrolled Today	Usage Start Date	Enrollment Type	Resource ID	Usage ID
Main Classroom	Classroom	Financial Education	15	0	3/11/2025	1	2634	6589
Main Classroom	Classroom	Financial Education Part 2	15	0	3/11/2025	1	2634	6590
Main Classroom	Classroom	Room 300	15	0	3/11/2025	1	2634	6559
Classroom A	Classroom	Room 100	10	0	3/11/2025	1	2637	6571
Classroom B	Classroom	Room 200	100	0	3/11/2025	2	2638	6572

At the bottom of the table is a page number '1' and a 'Results Per Page' dropdown set to '50'. A 'Done' button is located at the bottom right.

All Resources for the Organization then display, including the **Resource** name, **Resource Type**, **Usage**, capacity, and number enrolled. The list can be sorted by using **Category** and **Resource** at the top.

Notice, if one Resource has multiple Usages, they each display on the form individually.

## Resource Menu

From the menu of the Resource, there are several options for reserving and checking Clients into the Usage.

### Slot Check in Manager

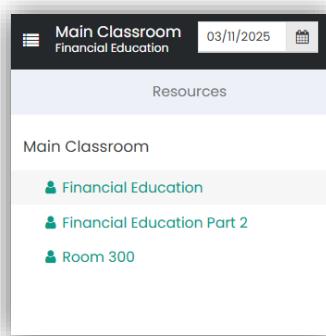
Off the Usage menu, select Slot Check In Manager.

This is the graphical representation of this Resource Usage's layout, or the classroom of desks. It displays all slots that are available for the Resource.

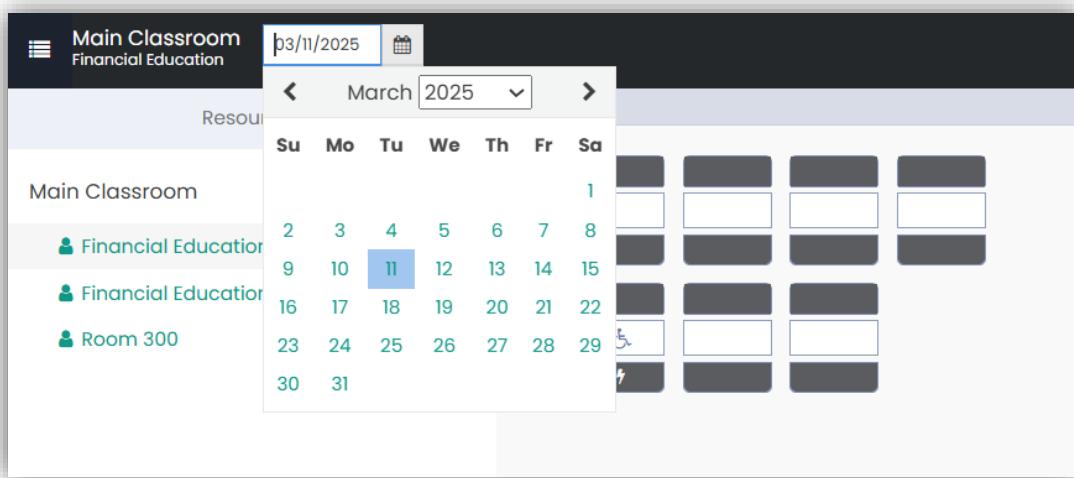


At the top, there are multiple options available.

The View Resources menu in the top left corner allows you to quickly access the Slot Room Manager for the Organization's other Resources.



You can also change the date to update the slot availability based on the date selected.



The legend at the bottom details the icons and color meanings.



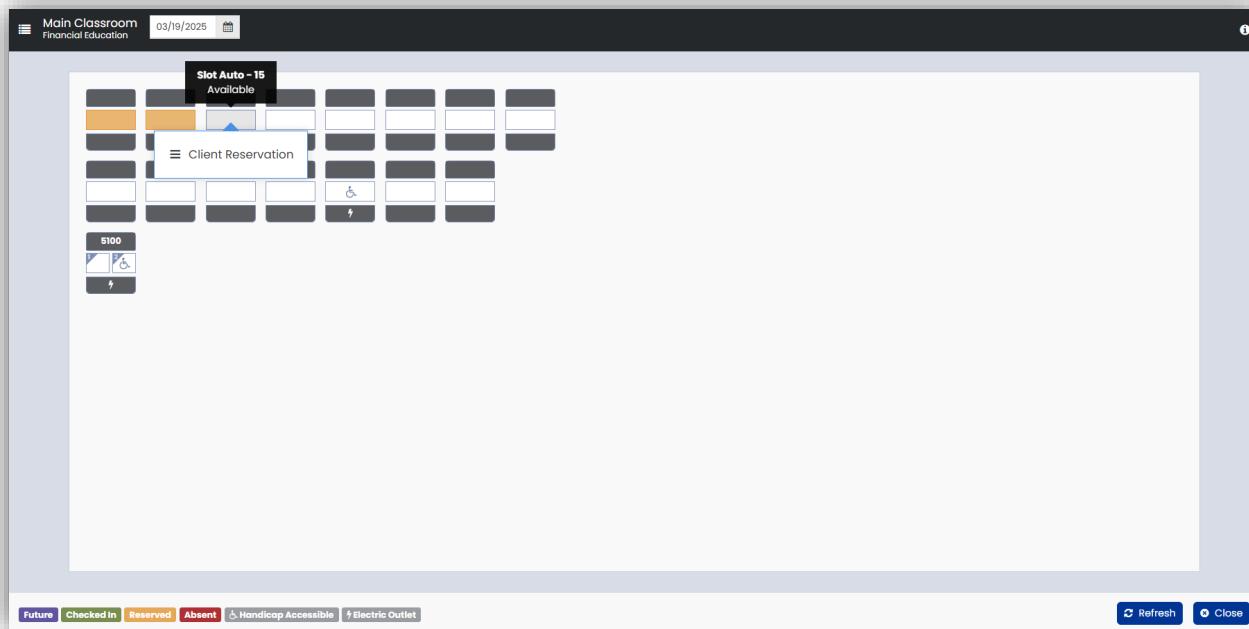
Slots that are reserved are highlighted in yellow.

Slots that are checked into are highlighted in green.

Slots that are available are highlighted with purple.

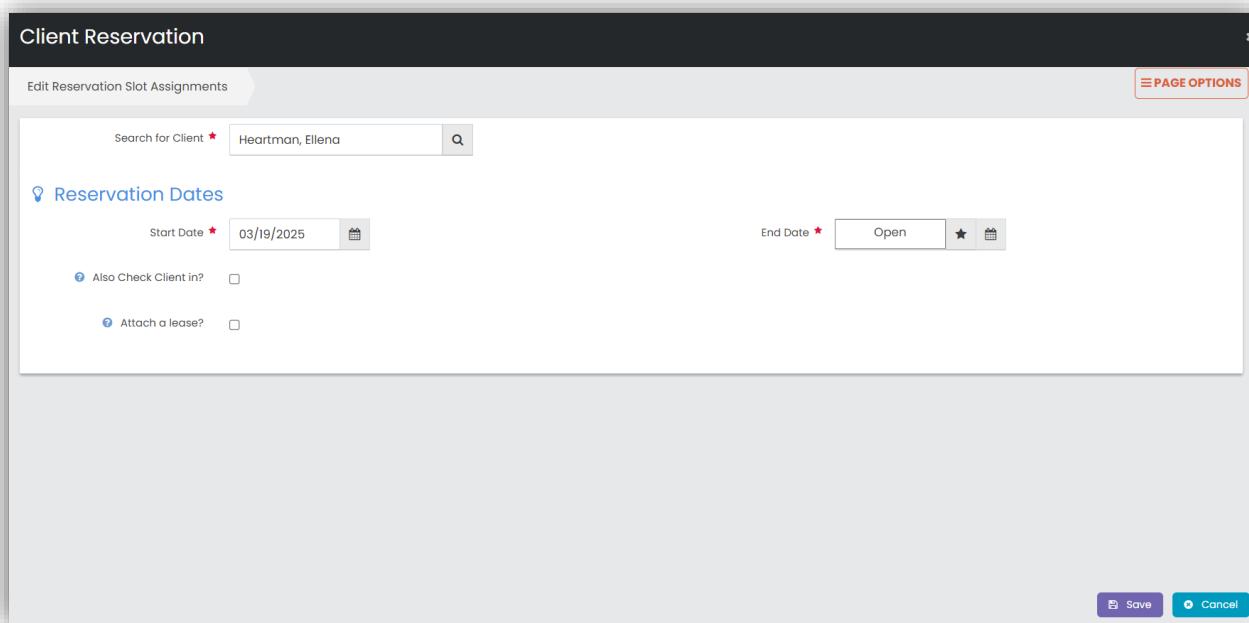
Also, notice that slots that are handicapped accessible or have an electrical outlet display images representing these features.

To add a reservation, click on an available slot and select Client Reservation.



The *Client Reservation* window is displayed.

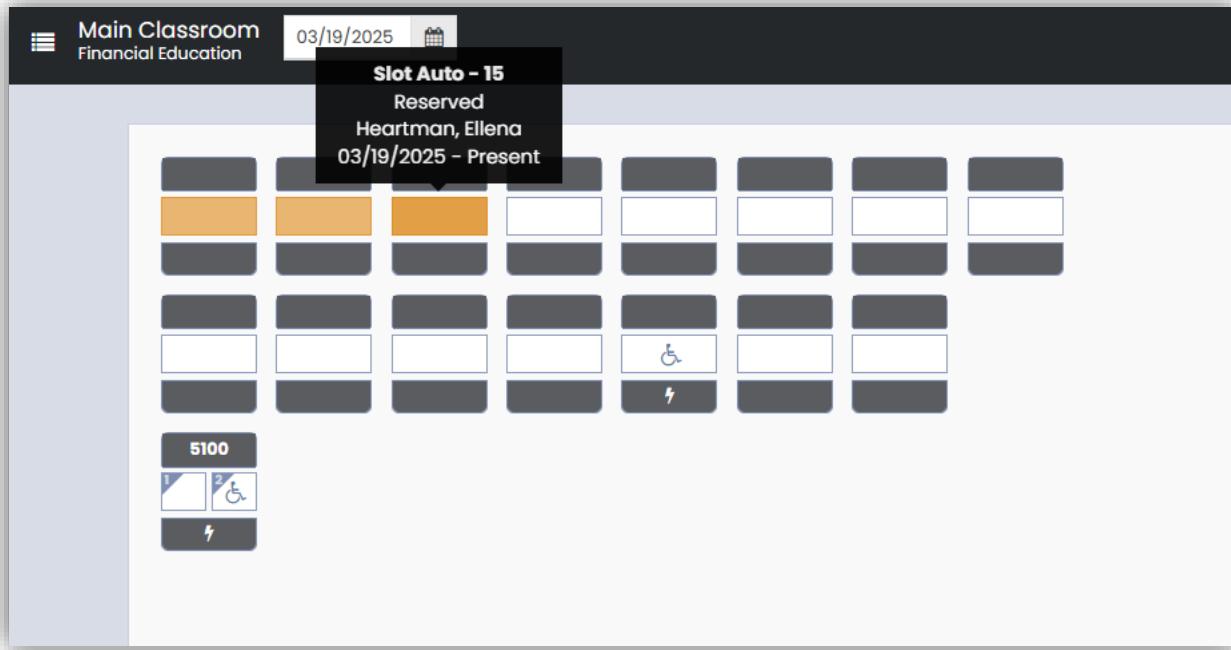
Click the lookup icon to search for a Client.



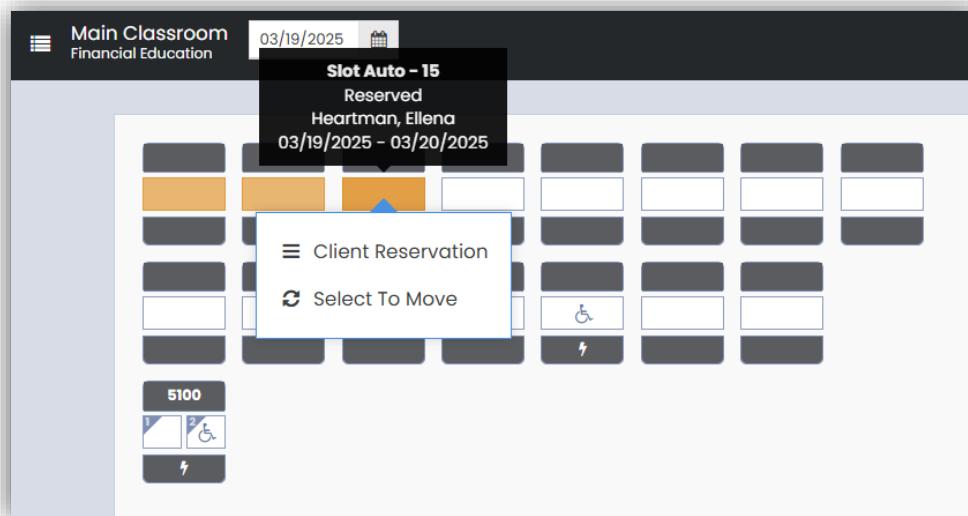
Enter the reservation dates and attach a lease agreement if necessary.

SAVE the new reservation.

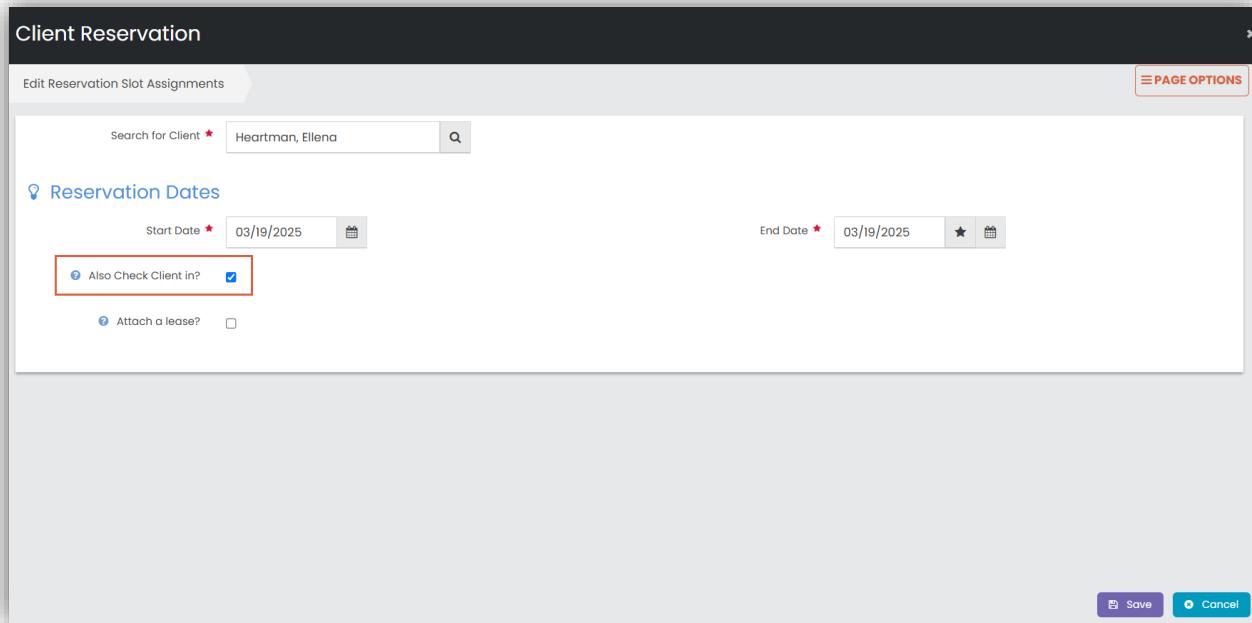
Once saved, the slot displays highlighted in yellow because the Client is reserved into the slot but is not yet checked in.



To check the Client in to the slot, select Client Reservation from the slot's menu.



In the *Client Reservation* window, select **Also Check Client in?**

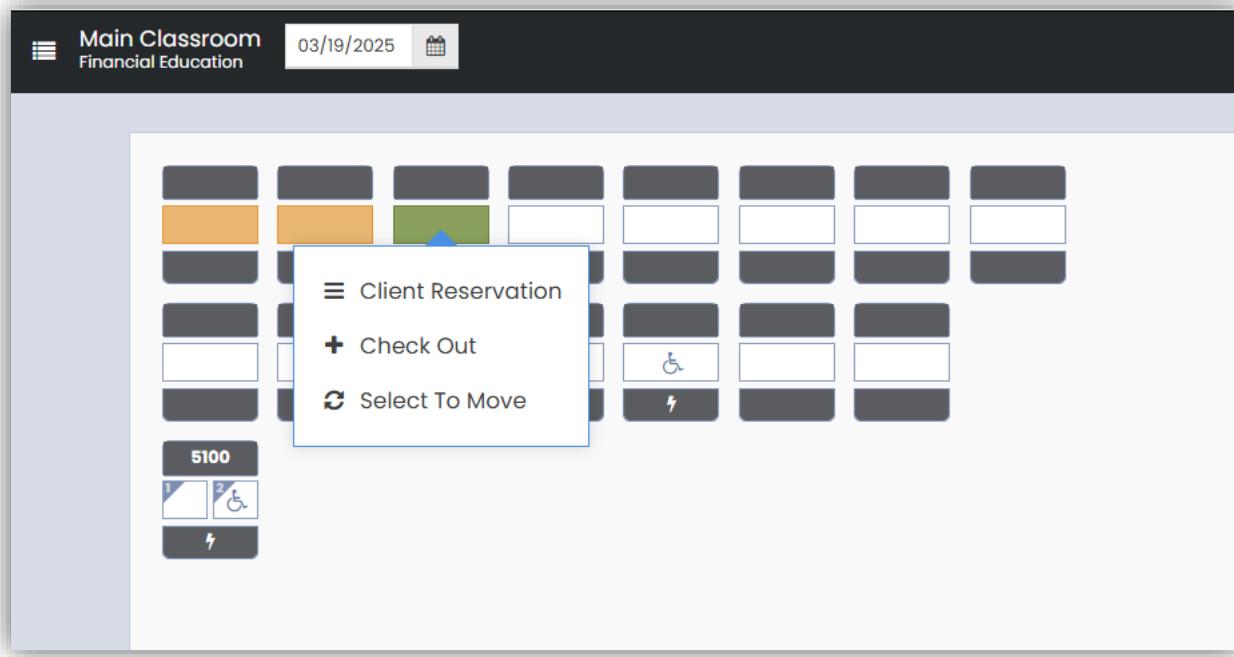


The slot is now highlighted in green to represent the Client has checked in.

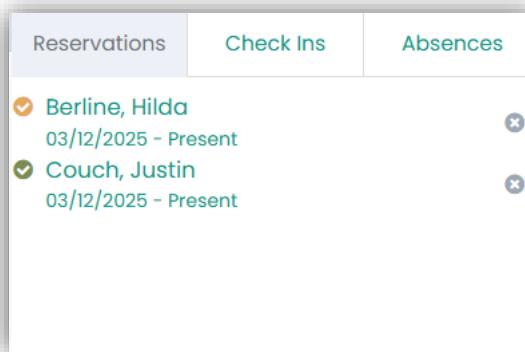


Each checked in slot (when highlighted in green) allows you to:

- Edit the details of the Client Reservation.
- Check the Client out of the slot.
- And easily move the Client from one slot to another.



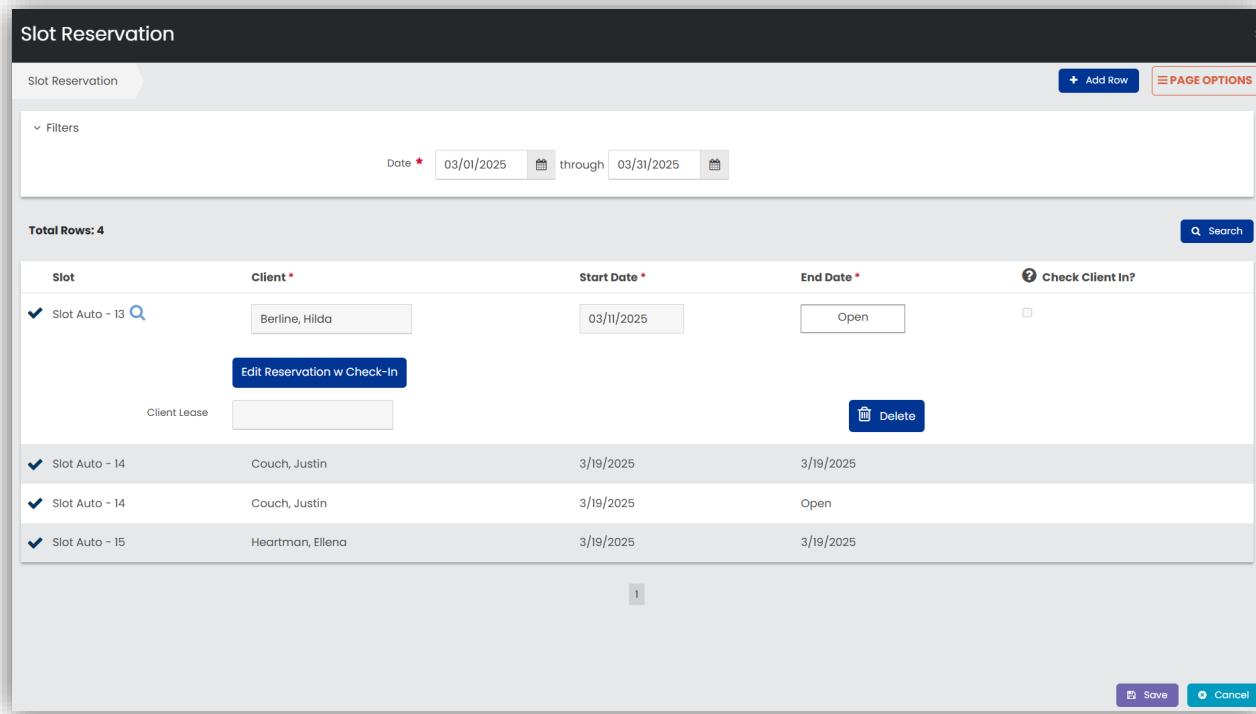
Use the information icon in the top right corner to open an additional window. There are three tabs that provide details about Client reservations, check ins, and absences. Use the checkmark and X icons to add and remove the Client accordingly.



## Slot Reservation

The next Usage menu item is Slot Reservation. Like the Slot Check In Manager, this form also allows you to add new reservations and check ins, as well as update existing reservations.

The two options offer the same functionality, but the Slot Check In Manager is a graphical representation and Slot Reservation is a list of slots. You can choose which option you prefer to use.



The screenshot shows the 'Slot Reservation' page. At the top, there is a header bar with the title 'Slot Reservation'. Below it is a toolbar with buttons for '+ Add Row' and 'PAGE OPTIONS'. A 'Filters' section includes date range inputs for 'Date' (03/01/2025) and 'End Date' (03/31/2025), along with a 'Search' button. The main area displays a table with the following data:

Slot	Client *	Start Date *	End Date *	Check Client In?
Slot Auto - 13	Berline, Hilda	03/11/2025	Open	<input type="checkbox"/>
				<a href="#">Edit Reservation w/ Check-In</a>
Slot Auto - 14	Couch, Justin	3/19/2025	3/19/2025	
Slot Auto - 14	Couch, Justin	3/19/2025	Open	
Slot Auto - 15	Heartman, Ellena	3/19/2025	3/19/2025	

At the bottom right of the table are 'Save' and 'Cancel' buttons. The page footer contains a copyright notice and a page number.

At the top of the form, the dates default to the current month. To view current reservations for the Usage, select the appropriate date range and click SEARCH.

Each reservation displays the slot name that is reserved, the Client's name, the dates of the reservation, as well as the option to check the Client in, if they are not checked in already.

Select ADD ROW to create a new reservation.

The **Slot** automatically defaults to the first available slot in the inventory.

Click the lookup icon to select a different slot if needed.

Slot	Client *	Start Date *	End Date *	Check Client In?
<input checked="" type="checkbox"/> Double Desk Q Double Desk - N/A - Open	Heartman, Lilly	03/11/2025	Open	<input type="checkbox"/>
<input checked="" type="checkbox"/> Slot Auto - 13 - N/A - Checked In			Delete	
<input checked="" type="checkbox"/> Slot Auto - 7 - N/A - Open	Berline, Hilda	03/11/2025	Open	<input type="checkbox"/>
<input checked="" type="checkbox"/> Double Desk - N/A - Open			Delete	

Then, click the lookup icon to search for the Client. You can search by last name, first name, birthdate, scan card ID, or Client ID.

### Find Client with Reservation Information Lookup

Find Client with Reservation Information PAGE OPTIONS

▼ Filters

Last Name	<input type="text" value="heartman"/> <span style="color: #ccc;">...</span>	First Name	<input type="text"/>
Birth Date	<input type="text"/> <span style="color: #ccc;">...</span>	Scan Card ID	<input type="text"/>
ClientID	<input type="text"/>		

The *Find Client with Reservation Information Lookup* form displays all Clients matching the search criteria within this Organization.

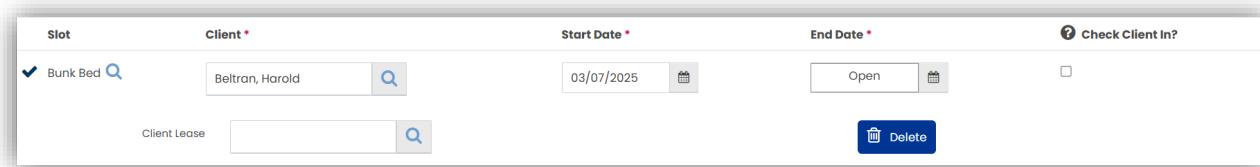
The list includes the Client name, if the Client already has a reservation, and if so, where, and when.

Name	Current Reserved In	Start Date	Client Gender	End Date	Birth Date	ClientID	Family Name	Barred Program	Bar Enroll Service	Barred Service	Resource ID
Heartman, Phillip			Man (Boy, if child)	5/16/2012	24474		Heartman, Phillip-1970-02-08				
Heartman, Lilly			Woman (Girl, if child)	5/27/2005	24475		Heartman, Lilly-2005-05-27				
Heartman, Lilly			Woman (Girl, if child)	5/27/2005	24475		Holt				
Heartman, Lilly			Woman (Girl, if child)	5/27/2005	24475		Heartman, Lilly-2005-05-27				

The form also displays if a Client is barred from any programs or services.

Select the Client to add a reservation.

The *Slot Reservation* form displays with the **Client** field now populated.



The screenshot shows the 'Slot Reservation' form. The 'Slot' field contains 'Bunk Bed'. The 'Client' field is populated with 'Beltran, Harold'. The 'Start Date' is set to '03/07/2025'. The 'End Date' is currently blank. A checkbox labeled 'Check Client In?' is checked. Below the form, there is a section for 'Client Lease' which is currently empty. At the bottom right of the form area is a 'Delete' button.

The **Start** and **End Date** capture the length of the reservation. If the Usage were set up to automatically perform check-ins, it would do so during this date range.

Select **Check Client In** to automatically check the Client in now or leave it blank to check them in later.

**Client Lease** information can be added here as well, which are assessments that are presented for leased properties.

An **Enrollment** field may also be displayed depending on the Usage's configuration.

- The **Enrollment** dropdown will appear when the **Enrollment Type** is either “Enter Enrollment” or “Enter Enrollment Optional” are selected.
- The dropdown does not appear when “Required/Auto Enrollment” or “No Action Required” are selected.

When entering reservations, the system will validate if the Client is allowed access to the Usage based on the Client's record and on the Usage's configuration. If they are not allowed, a message will display explaining the reasoning that prevents the reservations from being completed.

An error will display in the following scenarios:

- If the Client is not enrolled in the required program and the Usage does not include automatic enrollments.
- If the Client's profile does not match the Usage's allowability.
- If the Client is already reserved elsewhere.

Continue to add reservations as needed and then **SAVE** the form.

Once the reservation is saved and the Client is checked in, you will also have the option to edit or delete the record.



**EDIT RESERVATION W CHECK-IN** allows you to update the start and end date for the reservation.

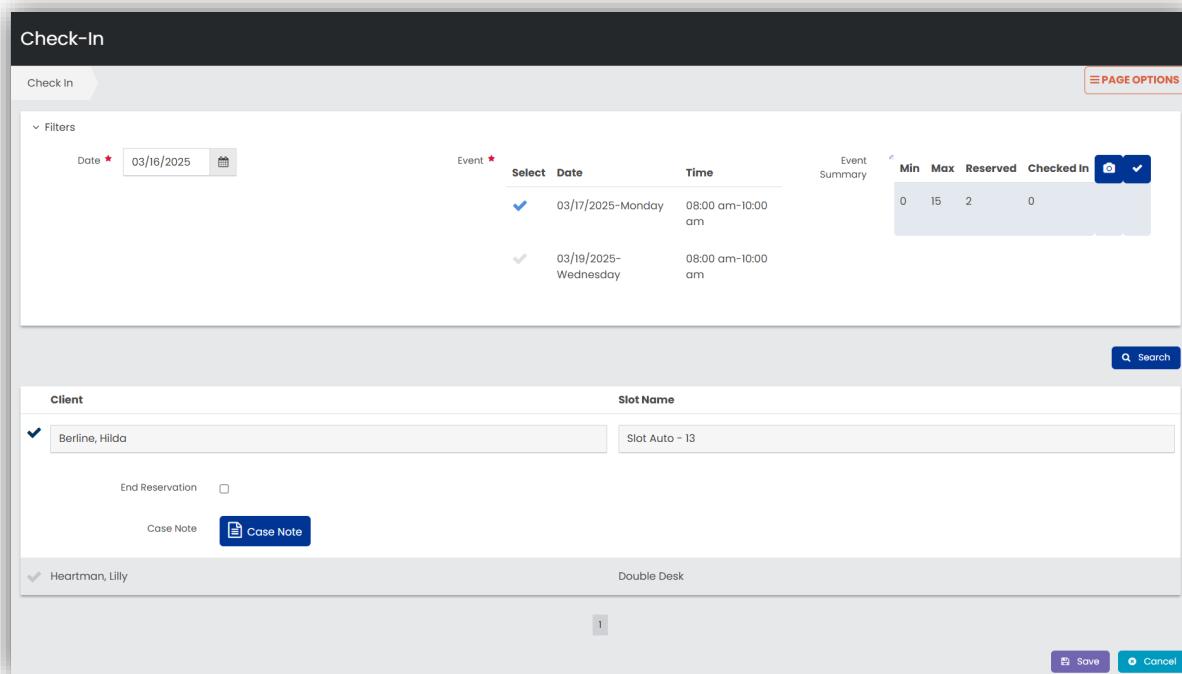
**DELETE** allows you to permanently remove the reservation, and all associated services, from the system.

If you accidentally check a Client into their reservation, you can undo that check-in by deleting the attendance service which was recorded for them in the check-in process.

## Check-in

Back on the Resource menu, select Check-in. Check-In is another way to check Clients into the Usage.

If the Usage was set up to provide one attendance service, the option on the menu is Check-in. If the Usage was set to post to more than one service, the option is Check-in with Multiple Services. The forms are similar.



Event	Select Date	Time	Event Summary
✓	03/17/2025-Monday	08:00 am-10:00 am	Min 0 Max 15 Reserved 2 Checked In 0
✓	03/19/2025-Wednesday	08:00 am-10:00 am	

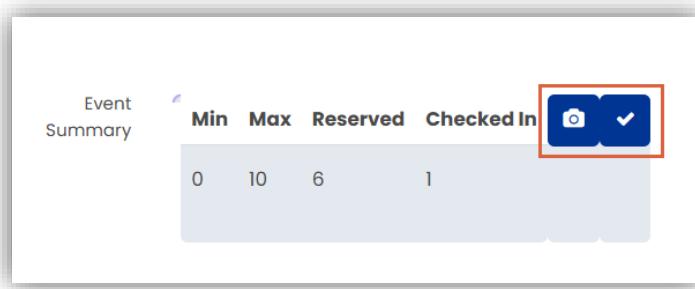
The *Check-In* form allows you to view a list of all reserved Clients for a selected date.

The **Date** defaults to today's date but can be changed. Select **SEARCH** to display the list of reservations for the selected date.

The **Event** details are displayed for the chosen date, as well as an **Event Summary**, which includes Resource capacity information, how many Clients have a reservation, and how many Clients are already checked in.

Each reservation includes the Client's name and **Slot Name**. There is also an option to end the reservation as well as add a case note.

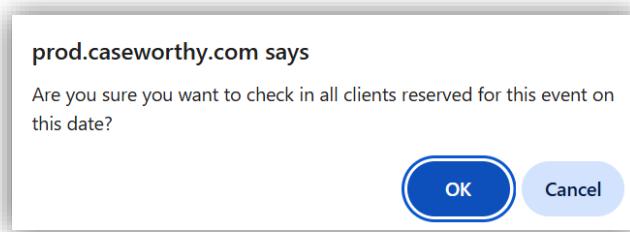
There are a couple of options for checking in any remaining reservations on this form.



In the top right corner, the camera icon can be used to check Client's in using scan cards. This will only work for single-service Usages.

Or use the checkmark icon in the top right corner to select all remaining reservations and check everyone in at one time.

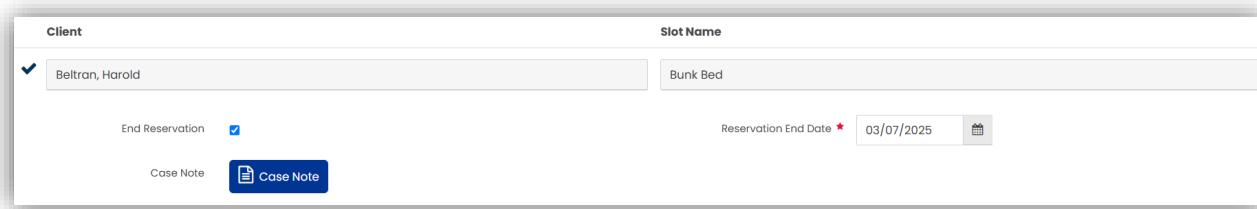
- A message displays prompting you to confirm the action.



Select OK. All Clients are then checked in, which is represented with a checkmark to the left of each Client's name.

Client	Slot Name
✓ Berline, Hilda	Slot Auto - 13
✓ Heartman, Lilly	Double Desk

Select any reservation to view or edit the details.



The screenshot shows a form titled "Client" with a dropdown menu showing "Beltran, Harold". To the right, it says "Slot Name: Bunk Bed". Below this, there is a checkbox labeled "End Reservation" which is checked. To the right of the checkbox is a date input field showing "Reservation End Date \* 03/07/2025" with a calendar icon. At the bottom left is a "Case Note" button with a pencil icon, and at the bottom center is another "Case Note" button with a blue background.

The Client's name and **Slot Name** cannot be changed.

**End Reservation** is used to end the reservation for the selected date. This could, for example, be the last time the Client checks in because the reservation ends tomorrow. If you are ending a reservation, select the end date for the reservation.

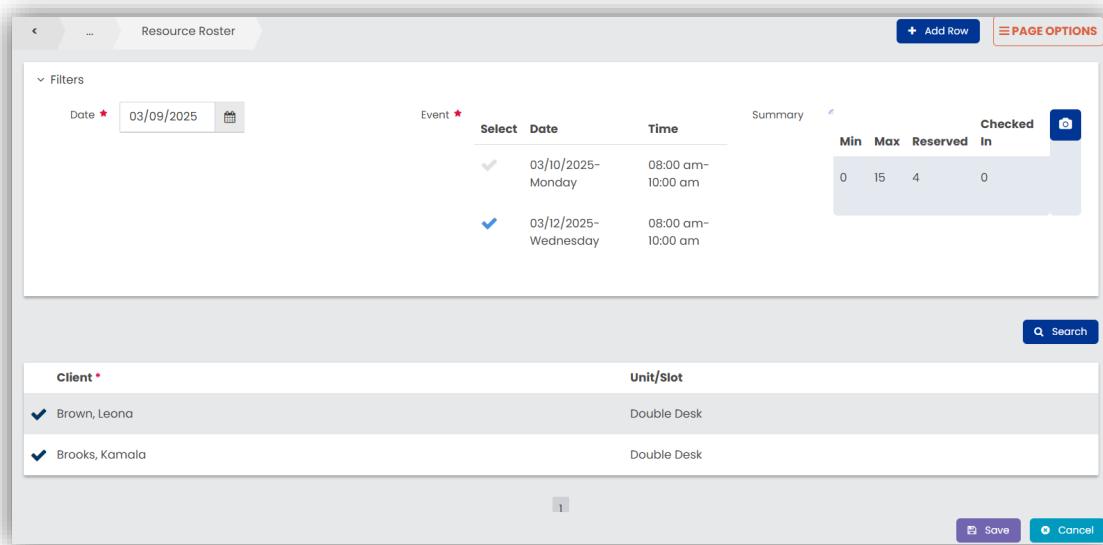
A CASE NOTE can be added to the reservation too.

When done, SAVE the form.

## Roster/Check in

Back on the Usage menu, Roster/Checkin allows you to add reservations and check Clients in by using scan card functionality. This form is similar to the Check-In menu option, but there are some notable differences.

- This form displays Clients with reservations that have not yet checked in.
- You can add new reservations on this form.
- You can check-in Clients with scan card functionality only.
- You can edit each reservation listed, including the Client's name and the slot.



The screenshot shows a "Resource Roster" page. At the top, there is a "Filters" section with a date input set to "03/09/2025". Below this is a table with columns: Event\*, Select, Date, Time, Summary, Min, Max, Reserved, and Checked In. Two rows are shown: one for Monday (03/10/2025) and one for Wednesday (03/12/2025). At the bottom, there is a "Client\*" list with two entries: "Brown, Leona" and "Brooks, Kamala", each associated with "Double Desk". There are "Save" and "Cancel" buttons at the bottom right.

Choose the appropriate date and select SEARCH.

Clients with reservations that have not yet checked in are displayed.

Use ADD ROW to record a new reservation.

The screenshot shows the 'Resource Roster' search interface. At the top, there are filters for 'Date' (set to 03/09/2025) and 'Event' (with two entries: '03/10/2025 - Monday' and '03/12/2025 - Wednesday'). Below the filters is a summary table with columns: Min, Max, Reserved, and Checked In. The values are 0, 15, 4, and 0 respectively. A camera icon is also present in the summary table header. The main list below shows clients and their assigned slots:

Client *	Unit/Slot
Peters, Melinda	Row 1, Desk 1
Brown, Leona	Double Desk
Brooks, Kamala	Double Desk

Click the lookup icon to search for and then select the Client.

The reservation is set to the next available slot by default.

Use the magnifying glass icon to select a different slot if needed.

The screenshot shows the 'Resource Roster' search interface with a client selected. A dropdown menu is open to the right of the client list, listing various unit/slot options. The options include: Row 1, Desk 1, Double Desk, Row 1, Desk 1 - Open, Row 1, Desk 2 - Open, Row 1, Desk 3 - Open, Row 1, Desk 4 - Open, and Slot Auto - 13 - Open.

You can continue to edit each reservation on this form until the Client is checked in.

Once a Client is checked in to the reservation, they will no longer display on this form.

When done, SAVE the form.

## Absence

Absence allows you to record Client absences for each day of class. Only Clients with reservations that have not yet checked in will display on the form.

The screenshot shows the 'Resource Usage Attendance' form. At the top, there is a date filter set to 03/16/2025. Below the filter, a message reads: '⚠ Please don't open the form and save or clients that have already Check In will display.' A table lists two events:

Select	Date	Time
<input checked="" type="checkbox"/>	03/17/2025-Monday	08:00 am-10:00 am
<input checked="" type="checkbox"/>	03/19/2025-Wednesday	08:00 am-10:00 am

Below the table, it says 'Total Rows: 2'. The main area displays two rows of client information:

Client	Absence Type*	Absence Reason
Brinkman, Kayden	Excused	Health/Hospital/Emergency
Frandow, Gemma		

At the bottom right are 'Save' and 'Cancel' buttons.

Select the date of the class.

Select the Client to choose an **Absence Type** and a **Reason**.

Enter any notes as necessary and then **SAVE** your changes.

## Wait List

A Wait List can be used to maintain a register of Clients waiting for a reservation.

This list displays all Clients waiting for a reservation and can be accessed at any time.

The screenshot shows the 'Usage Wait List' table. It has four columns: 'Created Date', 'Effective Date', 'Client Name', and 'Restriction'. There is one row of data:

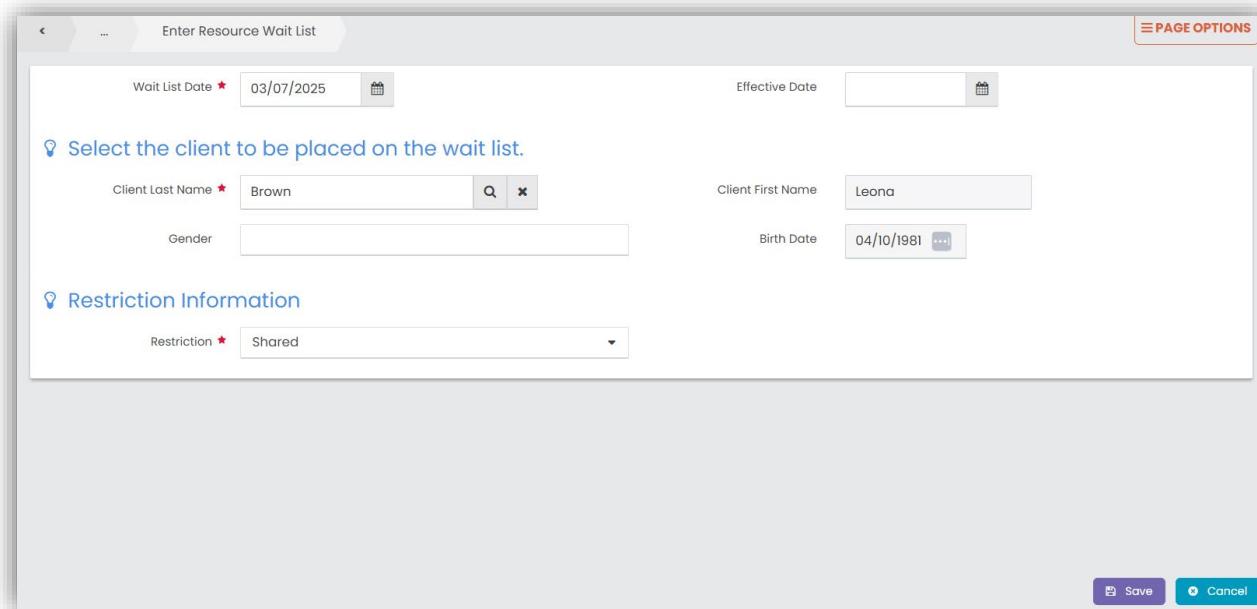
Created Date	Effective Date	Client Name	Restriction
3/10/2025	3/10/2025	Peters, Melinda	Shared

For example, if all seats are reserved for the month of December and you would like to maintain a record of Clients that would like to take over the reservation if one becomes available. This is used for reference purposes only and does not work with other functionality.

Use ADD NEW to include a Client on the waitlist.

Enter the appropriate details, including the date of the request and the Client's name.

Select SAVE when done.



Wait List Date \* 03/07/2025

Effective Date

Client Last Name \* Brown

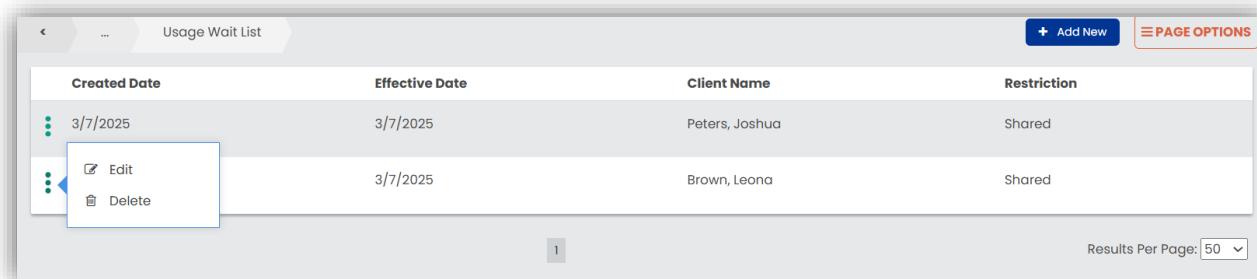
Client First Name Leona

Gender

Birth Date 04/10/1981

Restriction \* Shared

From the record's menu, select Edit to update the details of the request, or use Delete to remove the Client from the waiting list.



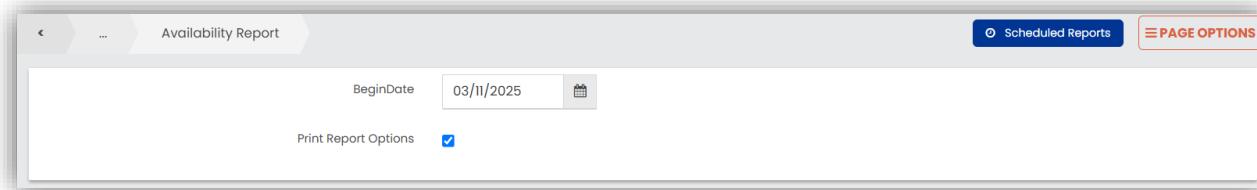
Created Date	Effective Date	Client Name	Restriction
3/7/2025	3/7/2025	Peters, Joshua	Shared
3/7/2025	3/7/2025	Brown, Leona	Shared

Results Per Page: 50

## Availability Report

The next option on the Usage menu is Availability Report, which displays the Classroom availability for ALL the Resource's Usages for a selected date.

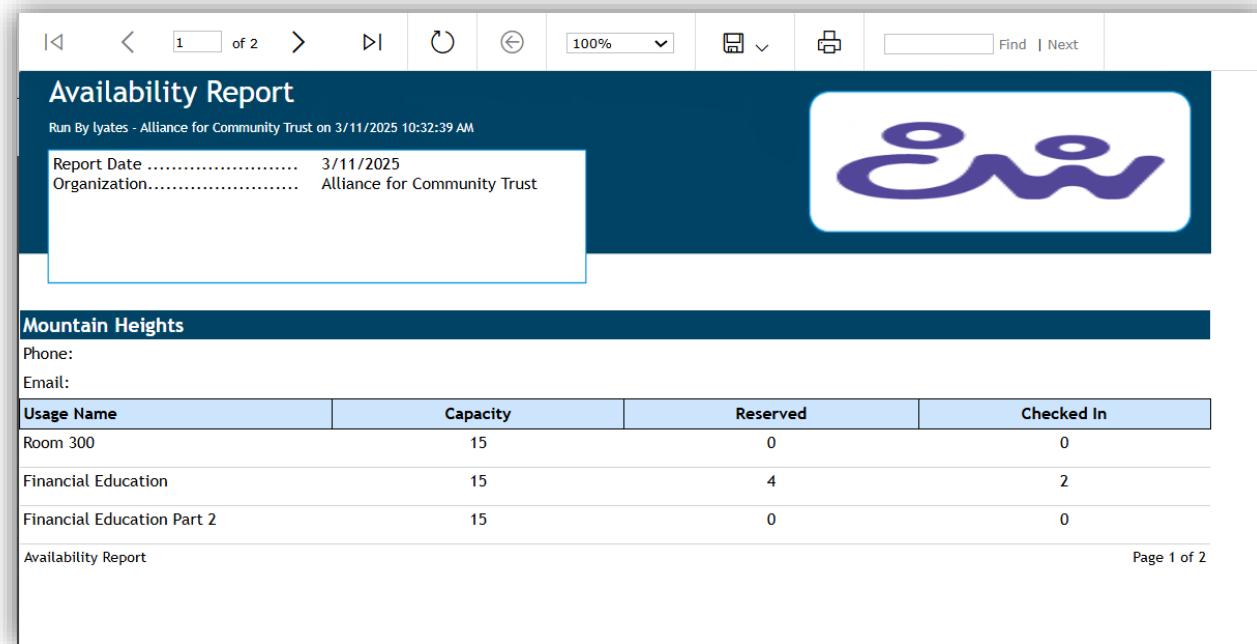
All the reports can be scheduled to automatically generate and to email to selected Users recurring on a set date and time.



Select the **Begin Date**, which defaults to today but can be changed.

Select **Print Report Options** to include the report's parameters on the second page of the report.

Select REPORT to run the report.

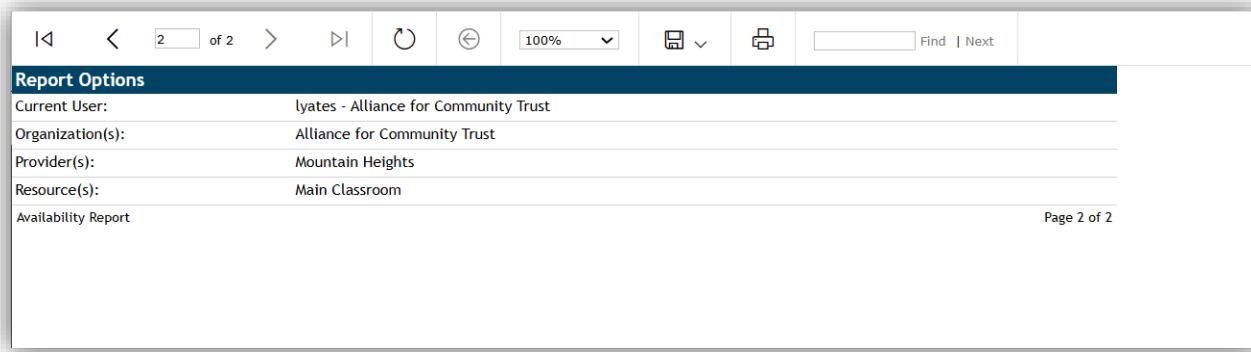


Usage Name	Capacity	Reserved	Checked In
Room 300	15	0	0
Financial Education	15	4	2
Financial Education Part 2	15	0	0

The details about the report are displayed at the top, including the User's name, the Organization, and the date and time the report was run.

Details about the Provider and its Classroom Resources as of today's date are also displayed, including each of the Usages, their capacity, how many slots are reserved, and how many slots are already checked in.

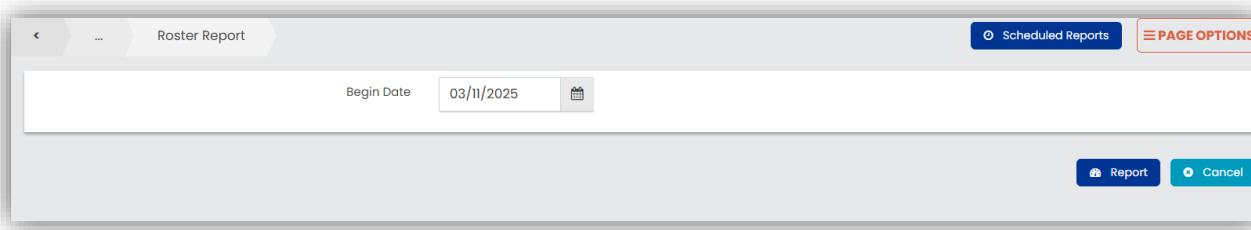
The second page displays the report options, including the current User, as well as the selected Organization, Provider, Resource, and Usage.



Using the toolbar at the top, the report can be saved in multiple formats and can be printed.

## Check-In Roster Report

The next option is the Check-in Roster Report which generates a list of all Clients for the selected Usage that are reserved for a selected date. Typically, this report is printed so Clients can sign when they check-in. This hard copy roster can then be used for reference later.



Select the **Begin Date**, which defaults to today but can be changed.

Then, run the report.

Roster Report

Run by Yates - Alliance for Community Trust on 3/11/2025 at 10:35 AM

Date Date: 3/11/2025 Organization: Alliance for Community Trust

Mountain Heights

258 East North Ogden Canyon Road  
OGDEN, UT 84201

Usage Name: Financial Education		Max Capacity: 15	
Name	Gender	Slot	Signature
Berline, Hilda	Woman (Girl, if child)	Slot Auto - 13	
Brinkman, Kayden	Man (Boy, if child)	Slot Auto - 2	
Frandow, Gemma	Woman (Girl, if child)	Slot Auto - 15	
Heartman, Lilly	Woman (Girl, if child)	Double Desk	

Roster Report

Page 1 of 1

At the top of the report, the details about how the report was generated are displayed along with the Provider.

Details about the Usage are highlighted in green.

And information about each Client with a reservation for this Usage for the selected date display, including the Client's name and gender, their assigned slot, and a space for the Client's signature.

Use the toolbar at the top to save or print the report.

## Case Management Tab

The Case Management tab provides access to the Resource for any Client within the selected Organization but also allows you to view and manage a Client's classwork, assign lockers and parking spaces to the Client, view the Client's appointment calendar, view a list of suggested classes for the Client, and access the Client's class and housing history.

### Class Calendar

To make reservations or check Clients in to a Usage, navigate to the Case Management tab. Select Calendars, and then select Class.

**Navigation** Case Management tab: Calendars > Class

The *Class Calendar* form displays.

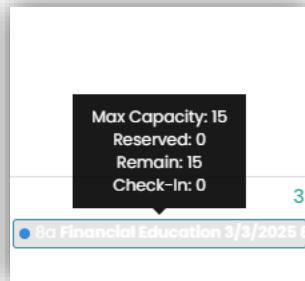
Select the **Provider**, **Resource**, and **Usage** to open the correct calendar.

The screenshot shows the CaseWorthy software interface with the following details:

- Header:** CASE MANAGEMENT, ORGANIZATION, ADMINISTRATION, REPORTS, MY CASEWORTHY, PAGE OPTIONS.
- User Profile:** Lois Yates, All Features.
- Client Information:** Melinda Peters, 05/21/1977, Woman (girl, if child), Client ID: 24489.
- Filters:** Provider: Mountain Heights, Resource: Main Classroom, Usage: Financial Education.
- Calendar View:** March 2025. The days of the week are labeled: Mon, Tue, Wed, Thu, Fri, Sat, Sun. Specific dates have blue boxes indicating scheduled classes:
  - March 3: 8:0 Financial Education 3/3/2025
  - March 4: 8:0 Financial Education 3/4/2025
  - March 5: 8:0 Financial Education 3/5/2025
  - March 10: 8:0 Financial Education 3/10/2025
  - March 11: 8:0 Financial Education 3/11/2025
  - March 12: 8:0 Financial Education 3/12/2025
  - March 17: 8:0 Financial Education 3/17/2025
  - March 18: 8:0 Financial Education 3/18/2025
  - March 19: 8:0 Financial Education 3/19/2025
  - March 24: 8:0 Financial Education 3/24/2025
  - March 25: 8:0 Financial Education 3/25/2025
  - March 26: 8:0 Financial Education 3/26/2025
- Buttons:** Search, month, week, day, Done.

All available classes display according to their set schedule. For example, Financial Education on Mondays and Wednesdays at 8:00 a.m.

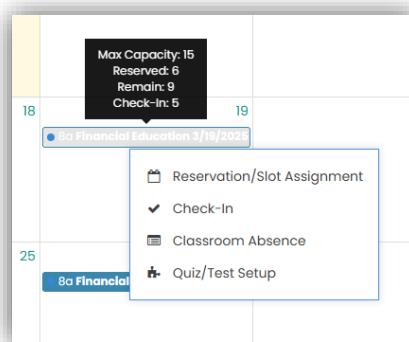
Hovering over a class displays its maximum capacity, number of seats reserved, remaining spots, and number of Clients already checked in.



The calendar is set to display a monthly view of the current month by default. Use the options at the top to change the view to a different month, week, or day.

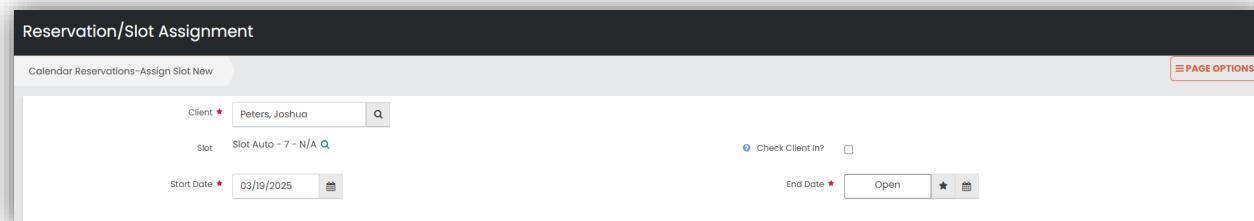
Mon	Tue	Wed	Thu	Fri	Sat	Sun
24	25	26	27	28	1	
3 8a Financial Education 3/3/2025	4 8a Financial Education 3/5/2025	5	6	7	8	
10 8a Financial Education 3/10/2025	11 8a Financial Education 3/12/2025	12	13	14	15	
17 8a Financial Education 3/17/2025	18 8a Financial Education 3/19/2025	19	20	21	22	
24	25	26	27	28	29	

Select a class to display additional options.



The options that display are dynamic and may differ depending on the Resource and Usage settings.

Select Reservation/Slot Assignment to add a new reservation. This form is like Slot Reservation on the Provider menu.



This screenshot shows the 'Reservation/Slot Assignment' form. At the top, it says 'Calendar Reservations-Assign Slot New'. The form fields include: 'Client \*' with 'Peters, Joshua' selected, a search icon, and a 'Check Client In?' checkbox. Below that are 'Slot' (set to 'Slot Auto - 7 - N/A'), 'Start Date \*' (set to '03/19/2025'), and 'End Date \*' (set to 'Open'). There are also 'PAGE OPTIONS' and a close button.

Select the Client.

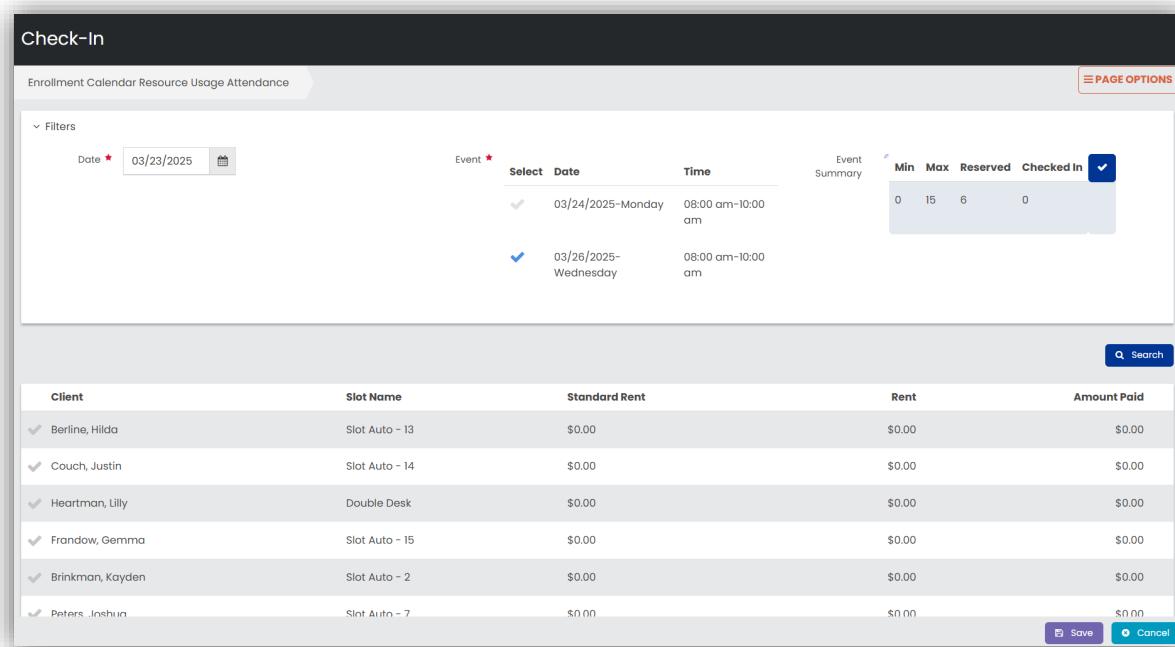
Then, select an available slot.

Select **Check Client in?** to check the Client in automatically when the reservation is saved.

The **Start Date** defaults to the calendar date selected and the **End Date** reflects the class end date. Both dates can be updated, as necessary.

SAVE the reservation.

Back on the menu, Check-In is the same as the Check-in option from the Provider's menu. This is one way to check a Client into their reservation.



This screenshot shows the 'Check-In' form. At the top, it says 'Enrollment Calendar Resource Usage Attendance'. The 'Filters' section includes a date selector set to '03/23/2025'. Below that is a table showing event details:

Event *	Select Date	Time	Event Summary	Min	Max	Reserved	Checked In
<input checked="" type="checkbox"/> 03/24/2025-Monday	03/24/2025-Monday	08:00 am-10:00 am		0	15	6	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> 03/26/2025-Wednesday	03/26/2025-Wednesday	08:00 am-10:00 am		0	0	0	<input checked="" type="checkbox"/>

Below this is a table of clients and their slot assignments:

Client	Slot Name	Standard Rent	Rent	Amount Paid
Berline, Hilda	Slot Auto - 13	\$0.00	\$0.00	\$0.00
Couch, Justin	Slot Auto - 14	\$0.00	\$0.00	\$0.00
Heartman, Lilly	Double Desk	\$0.00	\$0.00	\$0.00
Frandow, Gemma	Slot Auto - 15	\$0.00	\$0.00	\$0.00
Brinkman, Kayden	Slot Auto - 2	\$0.00	\$0.00	\$0.00
Peters, Joshua	Slot Auto - 7	\$0.00	\$0.00	\$0.00

At the bottom right are 'Save' and 'Cancel' buttons.

To check a Client in to a reservation, select the Client record and select SAVE. Or, to check all Clients in at once, use the checkmark icon in the top right corner.

Check-in reservations may display on the menu instead of Check-in.

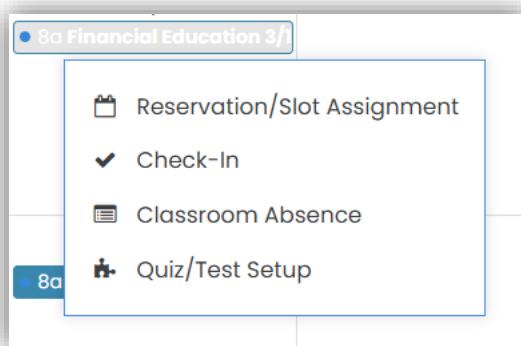
The *Check-in Reservations* form is used to check a Client in to the reservation as well but also includes options to mark if the Client was tardy or left class early.

This option will display only if the following is true:

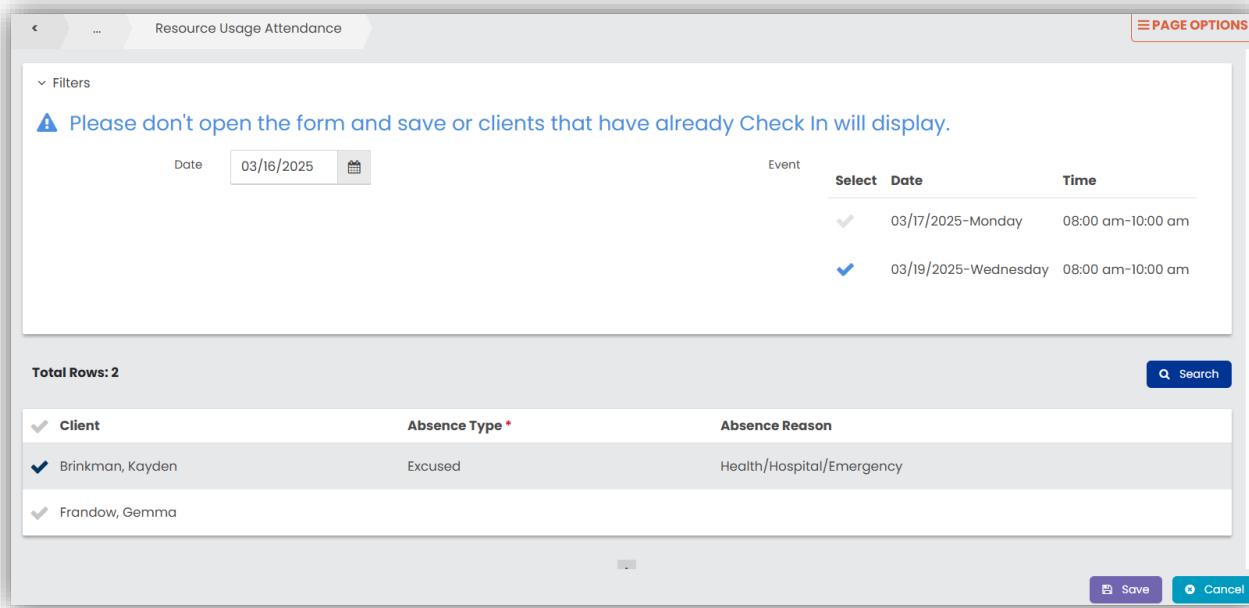
- The Resource is configured to create slots during check-in.
- The Usage is set to:
  - assign slots at check in.
  - only provide a single attendance service.

This information can then later be accessed from the *Classwork Dashboard*.

The next option is Classroom Absence, which is the Absence form also found on the Provider's menu.



The *Resource/Usage Attendance* form allows you to mark a Client absent from a reservation, as well as view a list of Clients that were previously noted as absent. This form will only display Clients who are not yet checked in.



**Resource Usage Attendance**

**Filters**

**⚠ Please don't open the form and save or clients that have already Check In will display.**

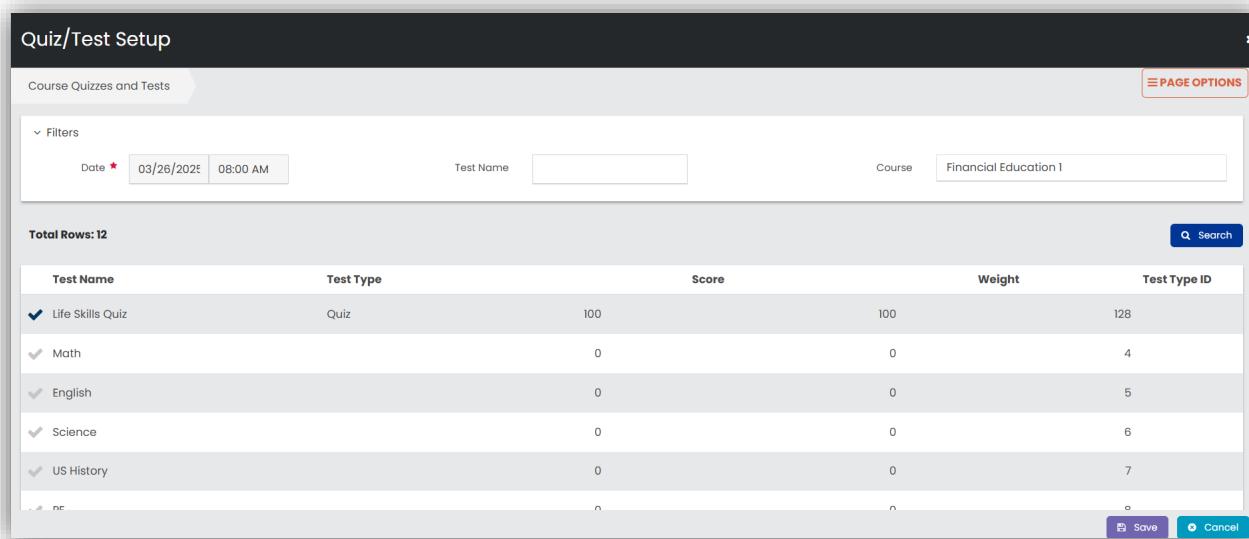
Date	03/18/2025	Event	Select	Date	Time
			<input checked="" type="checkbox"/>	03/17/2025-Monday	08:00 am-10:00 am
			<input checked="" type="checkbox"/>	03/19/2025-Wednesday	08:00 am-10:00 am

**Total Rows: 2**

Client	Absence Type *	Absence Reason
Brinkman, Kayden	Excused	Health/Hospital/Emergency
Frando, Gemma		

**Save** **Cancel**

Quiz/Test Setup is used to indicate that a test or quiz is offered for the selected date, and to add details about the test or quiz. Tests that are available on the form are managed in Codes and Categories.



**Quiz/Test Setup**

**Course Quizzes and Tests**

**Filters**

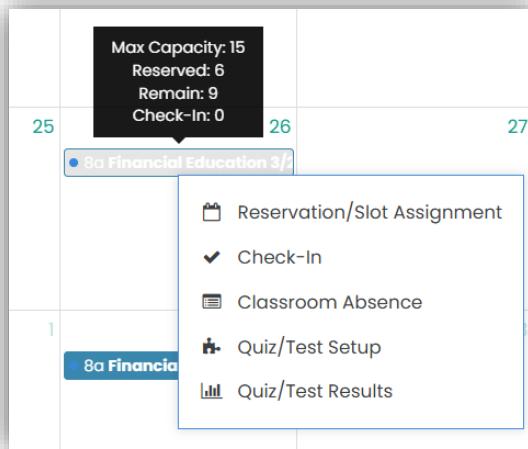
Date *	03/26/2025	08:00 AM	Test Name	Course
				Financial Education I

**Total Rows: 12**

Test Name	Test Type	Score	Weight	Test Type ID
Life Skills Quiz	Quiz	100	100	128
Math		0	0	4
English		0	0	5
Science		0	0	6
US History		0	0	7
NC		0	0	8

**Save** **Cancel**

Once the test has been administered, the Quiz/Test Results option is used to log results for each class participant.



Each Client that checked in to the class is displayed.

Client	Score*	Letter Grade*	Value
Brinkman, Kayden	0.00		
Peters, Joshua	100	A	
Berline, Hilda	0.00		

Enter a score and letter grade for each Client.

When done, SAVE the form.

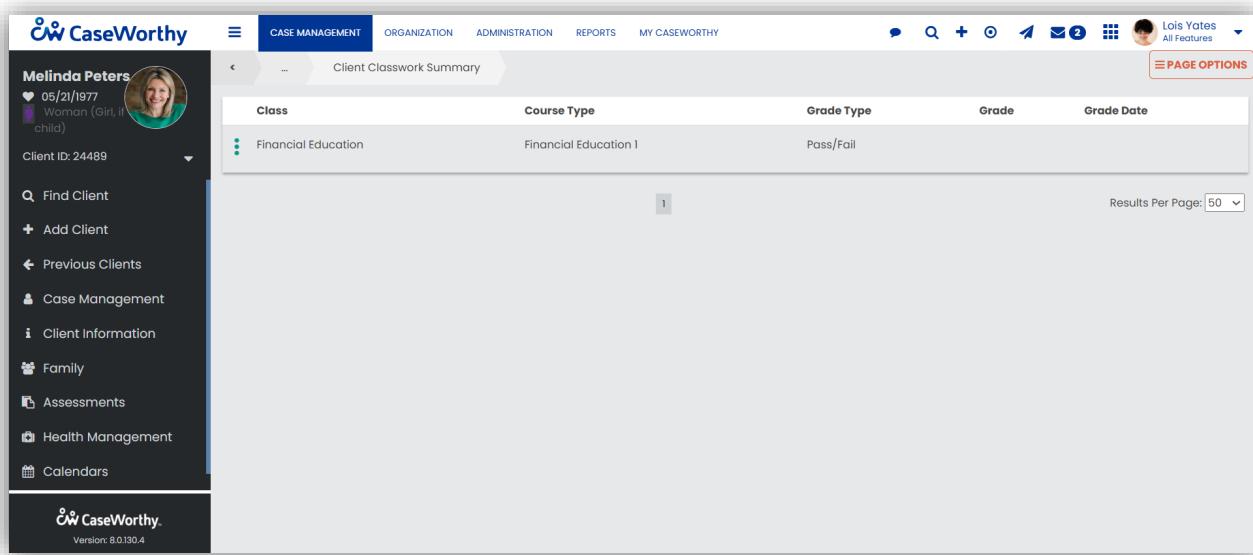
## Classwork

To access class information for the active Client, navigate on the Case Management tab to Specialty Items, then select Classwork Summary.

**Navigation** Case Management tab: Specialty Items > Classwork Summary

### Classwork Summary

The *Client Classwork Summary* form displays each class for which the Client has a reservation.



The screenshot shows the CaseWorthy software interface. On the left is a sidebar with a client profile for Melinda Peters (Client ID: 24489) and links for Find Client, Add Client, Previous Clients, Case Management, Client Information, Family, Assessments, Health Management, and Calendars. The main area is titled "Client Classwork Summary" and displays a table with one row of data:

Class	Course Type	Grade Type	Grade	Grade Date
Financial Education	Financial Education I	Pass/Fail		

At the bottom right of the main area, there is a "Results Per Page" dropdown set to 50.

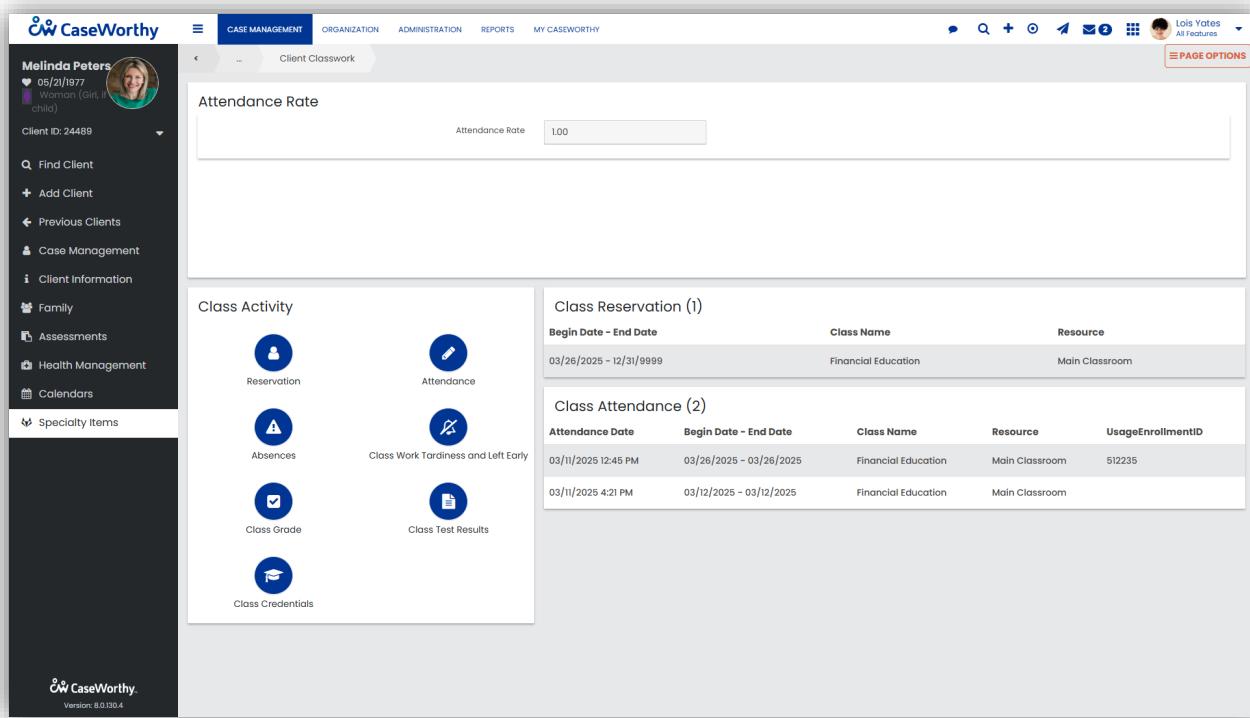
For a course to display, the Client must have a reservation, and the class Usage must have a course selected.

Once the course is completed, the final grade is entered into the application by the instructor and displays on this form in the **Grade** column.

## Classwork Dashboard

From the menu, select Classwork Dashboard.

The *Client Classwork* dashboard displays the Client's attendance rate, class activity, current reservations, and attendance for the selected class.



**Attendance Rate**

Attendance Rate
1.00

**Class Activity**

- Reservation
- Attendance
- Absences
- Class Grade
- Class Credentials

**Class Reservation (1)**

Begin Date - End Date	Class Name	Resource
03/26/2025 - 12/31/9999	Financial Education	Main Classroom

**Class Attendance (2)**

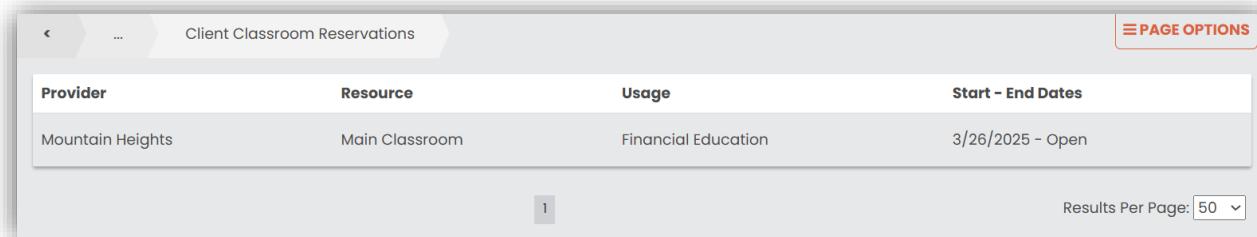
Attendance Date	Begin Date - End Date	Class Name	Resource	UsageEnrollmentID
03/11/2025 12:45 PM	03/26/2025 - 03/26/2025	Financial Education	Main Classroom	512235
03/11/2025 4:21 PM	03/12/2025 - 03/12/2025	Financial Education	Main Classroom	

## Attendance Rate

The **Attendance Rate** is calculated by dividing the number of Client class check-ins by the number of total class sessions. For example, if a class runs 5 days a week for 2 weeks, then there are a total of ten sessions. If the Client attends two sessions, the attendance rate is 2/10 or 20%.

## Class Reservation

The Class Reservation query widget displays the reservation details for the class and links to the *Client Classroom Reservations* form, which displays further details.

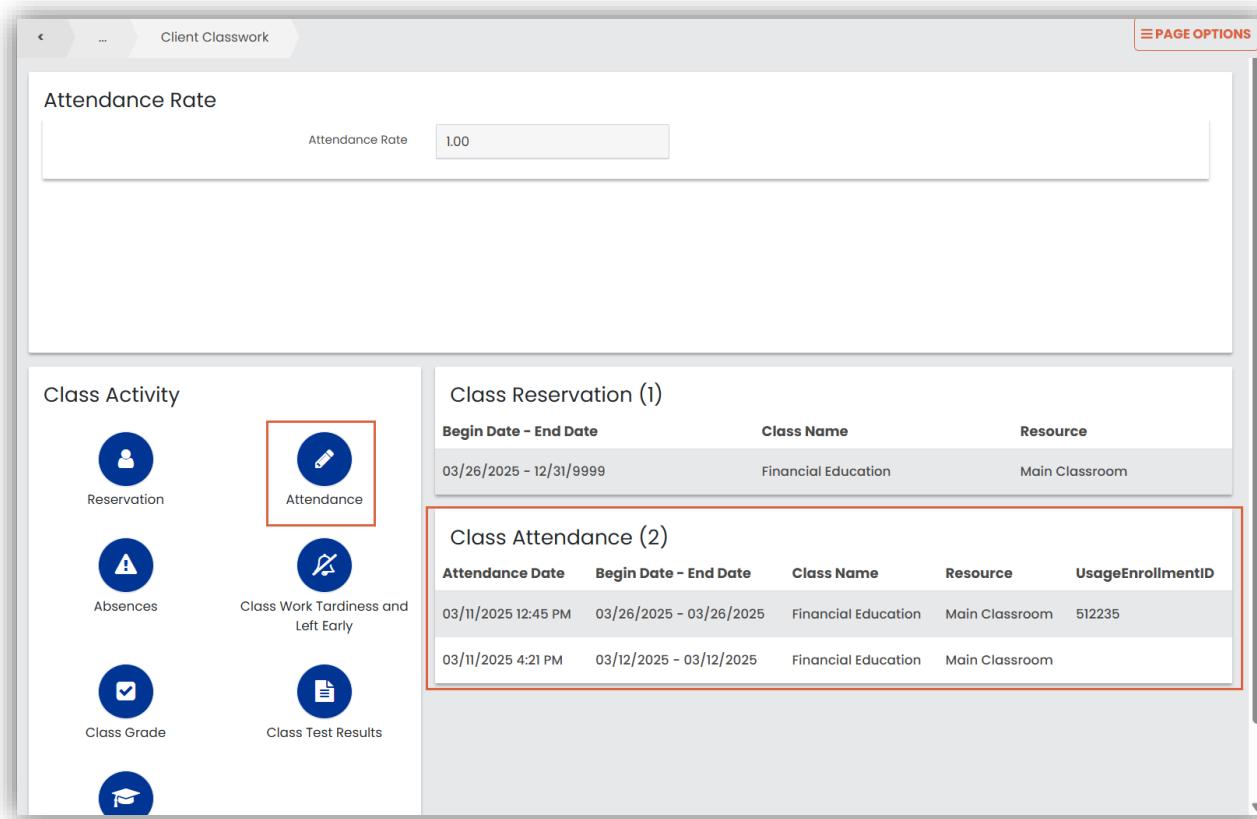


Provider	Resource	Usage	Start - End Dates
Mountain Heights	Main Classroom	Financial Education	3/26/2025 - Open

Results Per Page: 50

## Class Attendance

The Class Attendance query widget displays the history of the Client's attendance for the current class and will include the most recent five check-ins.



**Attendance Rate**

Attendance Rate: 1.00

**Class Reservation (1)**

Begin Date - End Date	Class Name	Resource
03/26/2025 - 12/31/9999	Financial Education	Main Classroom

**Class Attendance (2)**

Attendance Date	Begin Date - End Date	Class Name	Resource	UsageEnrollmentID
03/11/2025 12:45 PM	03/26/2025 - 03/26/2025	Financial Education	Main Classroom	512235
03/11/2025 4:21 PM	03/12/2025 - 03/12/2025	Financial Education	Main Classroom	

**Class Activity**

-  Reservation
-  Attendance
-  Absences
-  Class Work Tardiness and Left Early
-  Class Grade
-  Class Test Results

To view additional details about attendance, including all classes attended by the Client, use the Attendance menu link in the Class Activity section.

## Class Activity

The Class Activity menu links allows you to review details about the Client's progress in classes for which they have reservations.

The screenshot shows the 'Client Classwork' page. At the top, there is a header bar with a 'PAGE OPTIONS' button. Below it, a section titled 'Attendance Rate' displays a value of '1.00'. On the left, a sidebar titled 'Class Activity' contains five items with icons: 'Reservation' (person icon), 'Attendance' (pencil icon), 'Absences' (bell icon), 'Class Work Tardiness and Left Early' (bell icon), 'Class Grade' (checkmark icon), and 'Class Test Results' (document icon). The main content area is divided into two sections: 'Class Reservation (1)' and 'Class Attendance (2)'. The 'Class Reservation (1)' section shows one entry: Begin Date - End Date: 03/26/2025 - 12/31/9999, Class Name: Financial Education, Resource: Main Classroom. The 'Class Attendance (2)' section shows two entries:

Attendance Date	Begin Date - End Date	Class Name	Resource	UsageEnrollmentID
03/11/2025 12:45 PM	03/26/2025 - 03/26/2025	Financial Education	Main Classroom	512235
03/11/2025 4:21 PM	03/12/2025 - 03/12/2025	Financial Education	Main Classroom	

Reservation links to the same form as the Class Reservation query widget which displays details about the current class.

Attendance displays a historical record of all the classes the Client has checked in to, including the date, the class location, and the number of service units posted.

If the class is set to post to multiple services, there may be more than one record for each date.

The screenshot shows a table titled "Classes History" with the following columns: "Begin - End Dates", "Resource Name", "Usage Name", and "Units". The data is as follows:

Begin - End Dates	Resource Name	Usage Name	Units
3/26/2025 - 3/26/2025	Main Classroom	Financial Education	1.00
3/12/2025 - 3/12/2025	Main Classroom	Financial Education	1.00
11/23/2022 - 11/23/2022	Main Classroom	Room 300	0.50
11/23/2022 - 11/23/2022	Main Classroom	Room 300	0.50
11/21/2022 - 11/21/2022	Main Classroom	Room 300	0.50
11/21/2022 - 11/21/2022	Main Classroom	Room 300	0.50
11/16/2022 - 11/16/2022	Main Classroom	Room 300	0.50
11/16/2022 - 11/16/2022	Main Classroom	Room 300	0.50
11/14/2022 - 11/14/2022	Main Classroom	Room 300	0.50
11/14/2022 - 11/14/2022	Main Classroom	Room 300	0.50
11/9/2022 - 11/9/2022	Main Classroom	Room 300	0.50
11/9/2022 - 11/9/2022	Main Classroom	Room 300	0.50
11/7/2022 - 11/7/2022	Main Classroom	Room 300	0.50

Absences lists any classes the Client has been marked absent from, including the date and the reason for the absence.

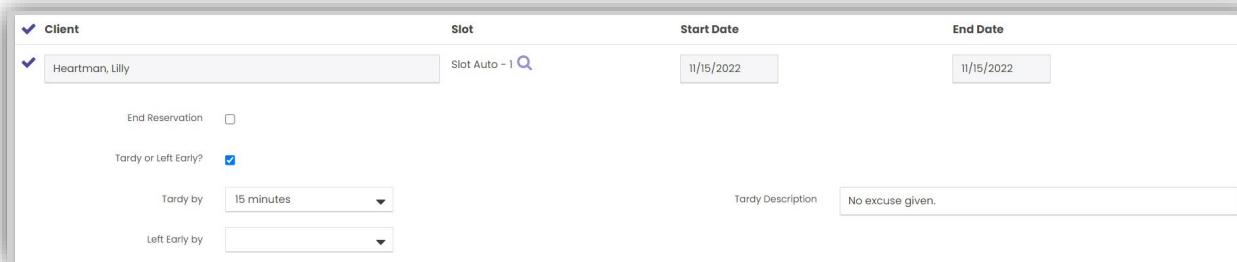
The screenshot shows a table titled "Resource Usage Attendance" with the following columns: "Client", "Absence Type", "Absence Reason", "Notes", "Begin Date", and "End Date". The data is as follows:

Client	Absence Type	Absence Reason	Notes	Begin Date	End Date
Peters, Melinda	Excused	Health/Hospital/Emergency		11/28/2022	11/28/2022

If the absence was added in error, the record can be deleted using Delete off the record's menu.

Class Work Tardiness and Left Early displays a record of each time the Client was marked as tardy or left class early. This feature is only available for Usages that record multiple services.

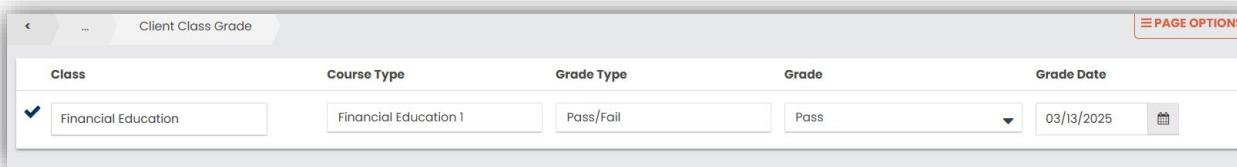
The information here is based on that which was entered on the *Check-in reservations* form on the Calendar from the Class menu. The form will only be available when the Usage is set to post to a single service and the slot is created at check-in, and the Resource is configured to create slots during check-in.



The screenshot shows the 'Check-in reservations' form for a client named Heartman, Lilly. The 'Client' section is selected. The 'Slot' field shows 'Slot Auto - 1'. The 'Start Date' and 'End Date' both show '11/15/2022'. Under 'Tardy or Left Early?', the checkbox is checked. The 'Tardy by' dropdown is set to '15 minutes' and the 'Left Early by' dropdown is empty. The 'Tardy Description' field contains 'No excuse given.'

Class Grade allows the instructor to record the Client's final grade for the course. It is important to note that the final grade is not automatically calculated by the system. Once a passing grade is saved, the course is marked as completed for the Client.

The class name, course type, and grade type display.



The screenshot shows the 'Client Class Grade' form. A single row is displayed with the following data: Class 'Financial Education', Course Type 'Financial Education 1', Grade Type 'Pass/Fail', Grade 'Pass', and Grade Date '03/13/2025'.

Select the class to record a new grade or to make any necessary changes.

Depending on the grade type set for the Course in Codes and Categories, a final grade should be entered or selected in the **Grade** field.

Because the **Grade Type** for this course is "Pass" or "Fail", grade options include "Pass" or "Fail".

If the grade type were "Letter Grade", the grade options would include "A", "B", "C", "D", etc.

If the grade type were "Percentage", a field to enter a percentage would be displayed.

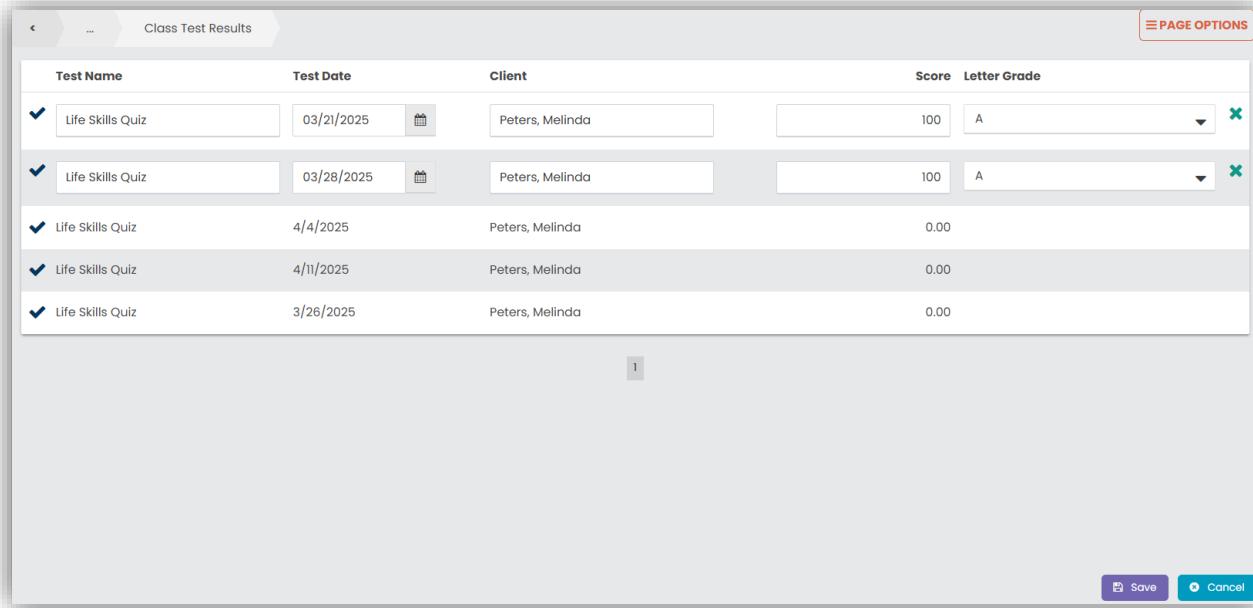
Lastly, enter the date the grade was recorded.

SAVE when done.

The next menu link is Class Test Results which is used to record the Client's grades for each test item scheduled during the course. The test items that are displayed, as well as their weight, are configured from the Classroom menu on the Administration tab.

Each test is displayed, including the name of the test and the test date.

It is possible to have multiple grades for one course.



Test Name	Test Date	Client	Score	Letter Grade
Life Skills Quiz	03/21/2025	Peters, Melinda	100	A
Life Skills Quiz	03/28/2025	Peters, Melinda	100	A
Life Skills Quiz	4/4/2025	Peters, Melinda	0.00	
Life Skills Quiz	4/11/2025	Peters, Melinda	0.00	
Life Skills Quiz	3/26/2025	Peters, Melinda	0.00	

1

To add a grade or to edit an existing record, select the test item.

Enter the Client's score for the test and select the appropriate letter grade that corresponds with the entered score.

SAVE the form.

The last item is Class Credentials which displays a list of all credentials the Client has earned by completing courses in the application. Skills and credentials are set up in Codes and Categories.

Total Rows: 7			
Credential	Skill	Description	Case Note
 Skill	Childcare	Passed Class: Room 300	
 Skill	Cooking	Passed Class: Room 300	
 Skill	Finance	Passed Class: Room 300	
 Skill	Organized	Passed Class: Room 300	
 Skill	Resume	Passed Class: Room 300	
 Skill	Self-Discovery	Passed Class: Room 300	
 Skill	Set Goals	Passed Class: Room 300	

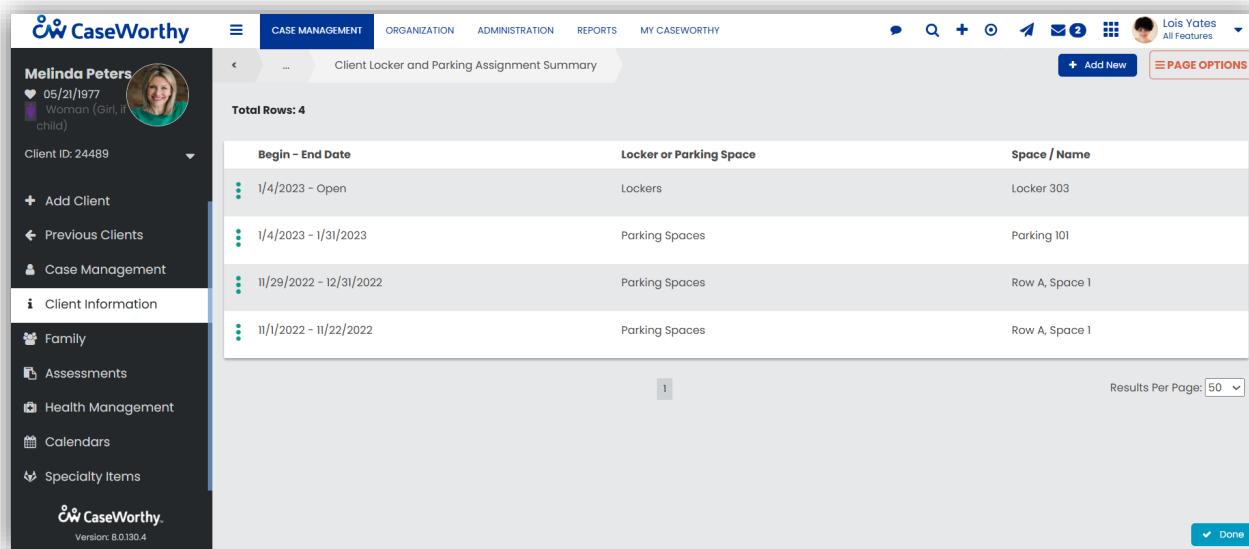
Skills and credentials are posted to the Client's record through a nightly batch process. Once posted, the skills and credentials are displayed on this form, as well as viewable on the *Employment & Retention Dashboard*.

The credentials only display once the Client completes the course, a passing grade is posted, and the nightly batch process is run.

## Lockers and Parking

During Resource setup, lockers and parking spaces were added. Every Provider Resource can include these amenities, which are then assigned to Client's individually on the Case Management tab.

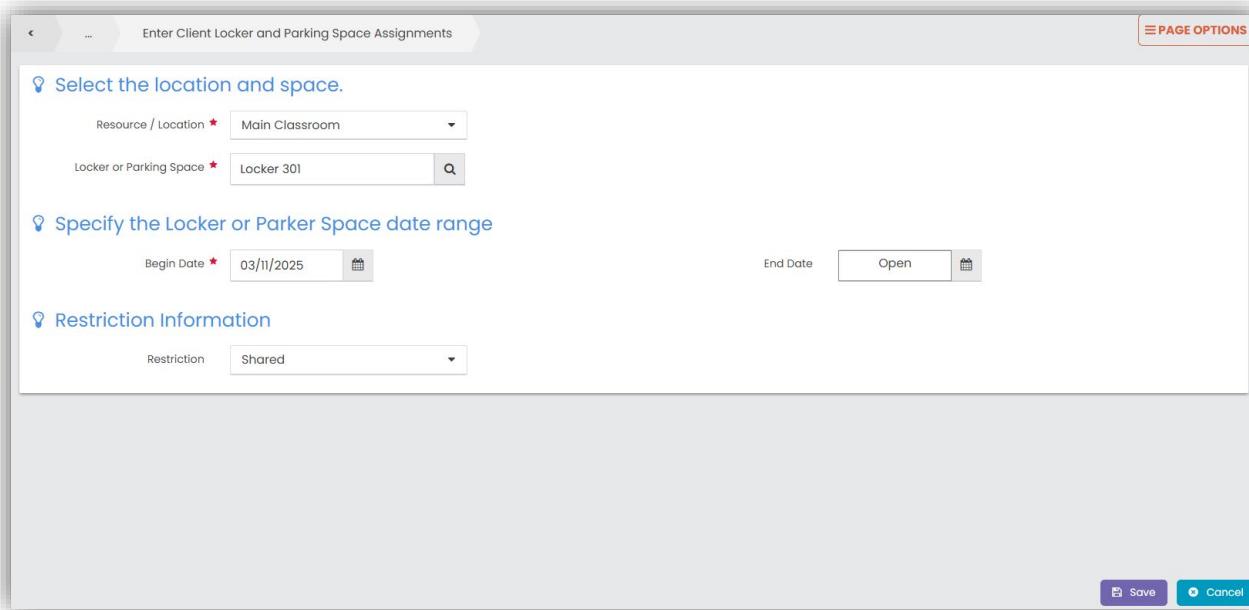
**Navigation** Case Management tab: Client Information > Locker and Parking Assignment



Begin - End Date	Locker or Parking Space	Space / Name
1/4/2023 - Open	Lockers	Locker 303
1/4/2023 - 1/31/2023	Parking Spaces	Parking 101
11/29/2022 - 12/31/2022	Parking Spaces	Row A, Space 1
11/1/2022 - 11/22/2022	Parking Spaces	Row A, Space 1

A list is displayed that includes lockers and parking spaces the Client has already been assigned.

Select ADD NEW to add a new locker or parking space assignment.



Enter Client Locker and Parking Space Assignments

Select the location and space.

Resource / Location ★: Main Classroom

Locker or Parking Space ★: Locker 301

Specify the Locker or Parker Space date range

Begin Date ★: 03/11/2025

End Date: Open

Restriction Information

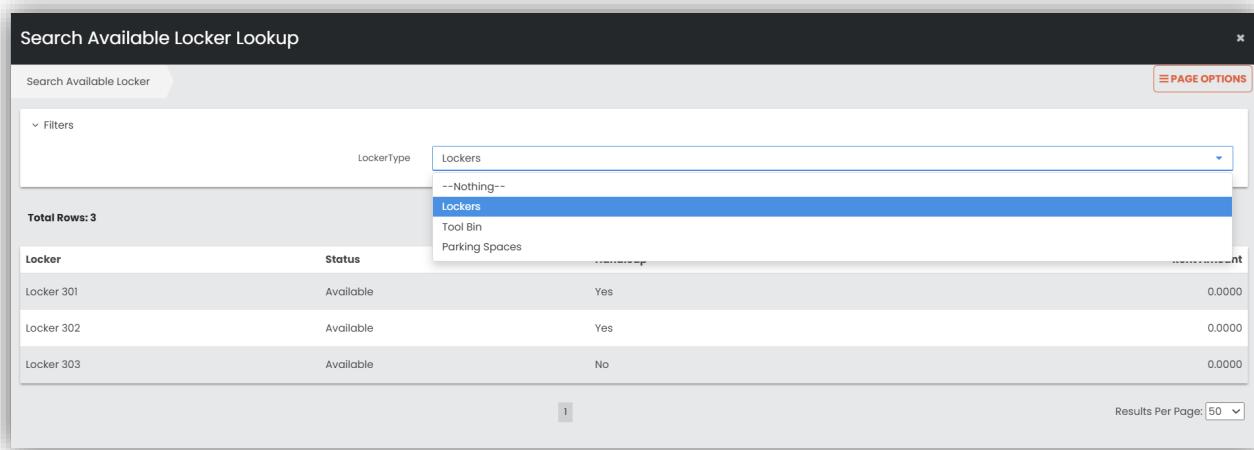
Restriction: Shared

Save Cancel

Start by selecting the **Resource**.

All the Provider's Resources are listed.

Click the lookup icon to select from a list of available lockers or parking spaces for the selected Resource. The search form defaults to available “Lockers” but can also be changed to view a list of available “Parking Spaces”.

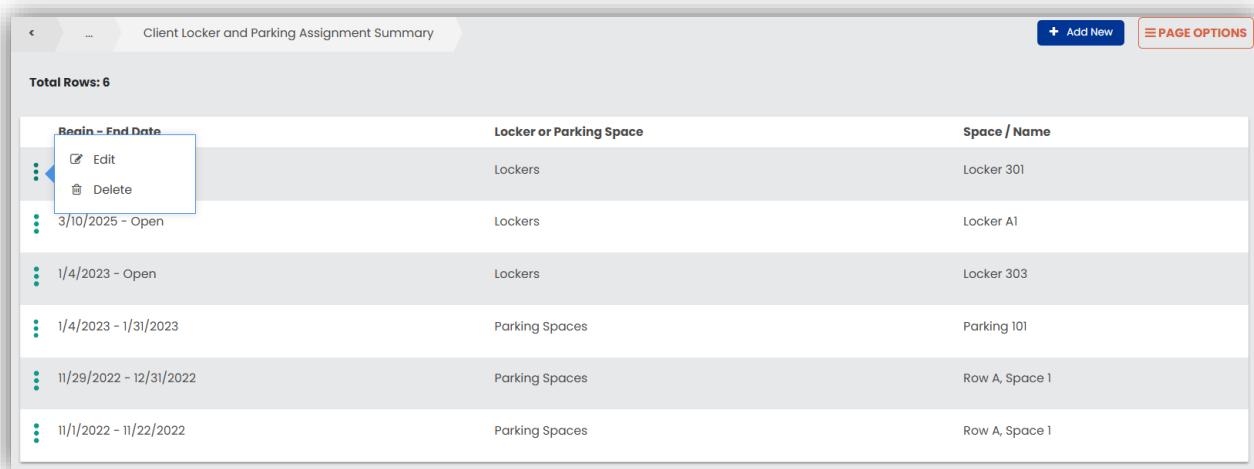


Locker	Status	
Locker 301	Available	Yes
Locker 302	Available	Yes
Locker 303	Available	No

The **Begin Date** is set to today and the **End Date** is set to “Open” by default, but both can be updated, as necessary.

The **Restriction** level follows the Organization’s data level sharing rules. It is set to “Shared” by default but can also be changed.

Each assignment can also be edited or deleted off the record’s menu.

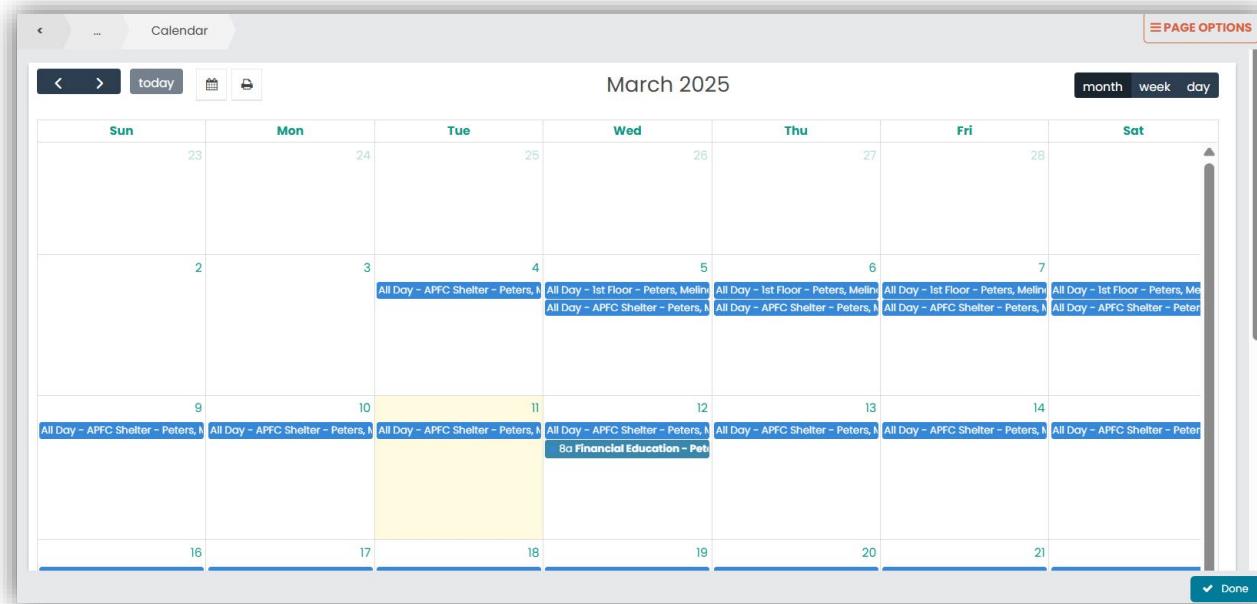


Begin - End Date	Locker or Parking Space	Space / Name
3/10/2025 - Open	Lockers	Locker 301
1/4/2023 - Open	Lockers	Locker A1
1/4/2023 - 1/31/2023	Parking Spaces	Parking 101
11/29/2022 - 12/31/2022	Parking Spaces	Row A, Space 1
11/1/2022 - 11/22/2022	Parking Spaces	Row A, Space 1

## Client Calendar

The Client's Calendar allows you to view all existing appointments for the selected Client. This includes appointments, follow-ups, and any Resource Usage the Client has a reservation for.

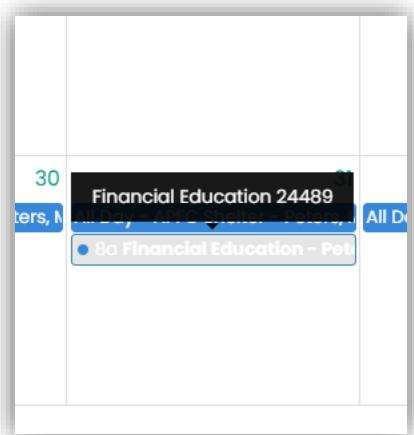
**Navigation** Case Management tab: Case Management > Client Calendar



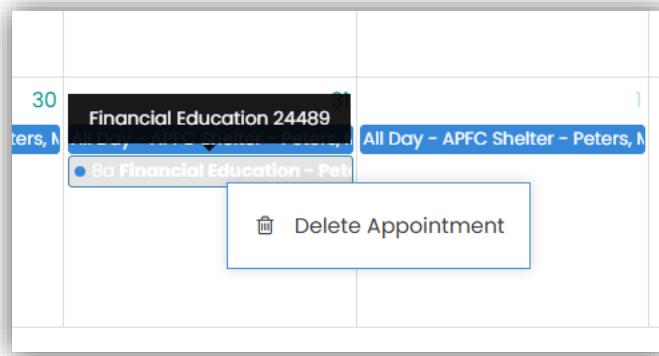
The calendar displays the current month by default. The view can be changed by using the options at the top.

The Client's appointments and reservations are displayed, but new appointments and reservations cannot be added on this form.

Hover over any appointment to see its details.



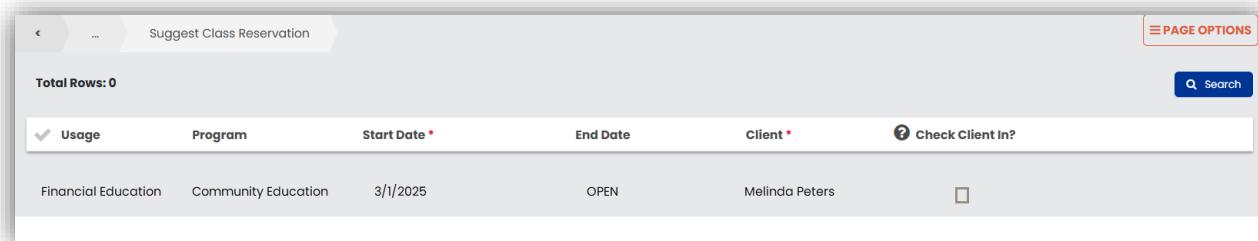
Or click the appointment and select Delete to remove the appointment or reservation from the Client's calendar.



## Suggested Classes

The *Suggest Class Reservation* form displays a list of classes recommended for the Client. The classes that display are based on your program configuration and the keywords assigned to your Classroom Resource Usages.

**Navigation** Case Management tab: Client Information > Suggested Classes



Usage	Program	Start Date *	End Date	Client *	Check Client In?
Financial Education	Community Education	3/1/2025	OPEN	Melinda Peters	<input type="checkbox"/>

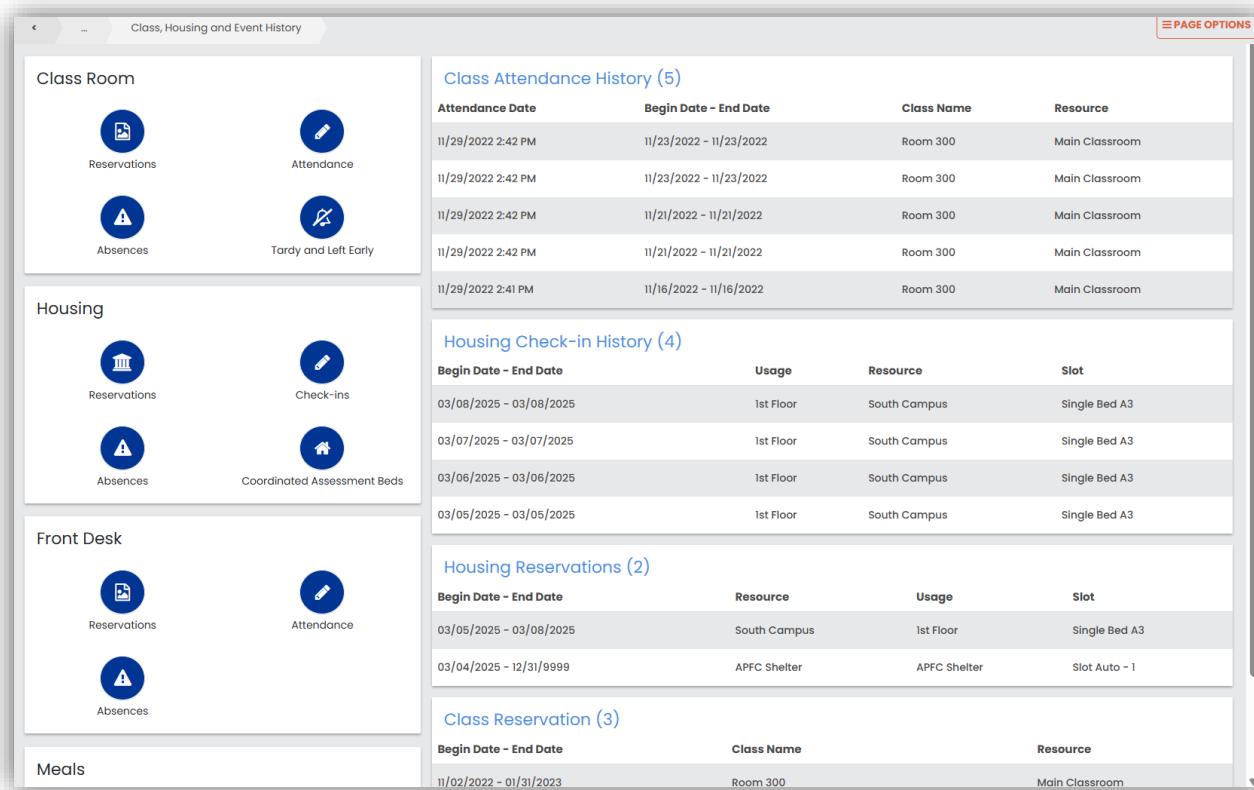
The Client can be reserved and checked in directly on this form.

## Class, Housing, and Event History

The *Class, Housing, and Event History* dashboard allows you to view a historical record of the selected Client's Resources and Usages.

**Navigation** Case Management tab: Specialty Items > Class and Housing History

The dashboard includes information about the Client's past reservations, check-ins, absences, meals, tardies, and more.



The screenshot displays the 'Class, Housing and Event History' dashboard with the following sections:

- Class Room:** Includes icons for Reservations, Attendance, Absences, and Tardy and Left Early.
- Housing:** Includes icons for Reservations, Check-ins, Absences, and Coordinated Assessment Beds.
- Front Desk:** Includes icons for Reservations and Attendance.
- Meals:** No visible icons or data.

Below these sections are three main data tables:

- Class Attendance History (5):**

Attendance Date	Begin Date - End Date	Class Name	Resource
11/29/2022 2:42 PM	11/23/2022 - 11/23/2022	Room 300	Main Classroom
11/29/2022 2:42 PM	11/23/2022 - 11/23/2022	Room 300	Main Classroom
11/29/2022 2:42 PM	11/21/2022 - 11/21/2022	Room 300	Main Classroom
11/29/2022 2:42 PM	11/21/2022 - 11/21/2022	Room 300	Main Classroom
11/29/2022 2:41 PM	11/16/2022 - 11/16/2022	Room 300	Main Classroom
- Housing Check-in History (4):**

Begin Date - End Date	Usage	Resource	Slot
03/08/2025 - 03/08/2025	1st Floor	South Campus	Single Bed A3
03/07/2025 - 03/07/2025	1st Floor	South Campus	Single Bed A3
03/06/2025 - 03/06/2025	1st Floor	South Campus	Single Bed A3
03/05/2025 - 03/05/2025	1st Floor	South Campus	Single Bed A3
- Housing Reservations (2):**

Begin Date - End Date	Resource	Usage	Slot
03/05/2025 - 03/08/2025	South Campus	1st Floor	Single Bed A3
03/04/2025 - 12/31/9999	APFC Shelter	APFC Shelter	Slot Auto - 1

A 'PAGE OPTIONS' button is located in the top right corner of the dashboard area.

# Appendix

Resource Category	Description and Other Functionality Available	Use Case	Specialized Check In Manager	Calendar	Required Provider Category	Required Usage Category
Classroom	A structured learning environment where individuals receive education, training, or skill-building.	Used for tracking attendance, scheduling classes, and managing training programs or workshops for Clients.	Yes	Class	Any	Any
Housing	General housing resources available for Clients in need of temporary or permanent shelter.	Assigning Clients to available housing units, tracking housing placements, and monitoring housing stability.	Yes	No calendar	No	No
Scattered Site Housing	Housing assistance where Clients are placed in distinct locations rather than a centralized facility.	Tracking participants in community-based housing programs, managing landlord partnerships, and monitoring lease agreements.	Yes	No calendar	Scattered Site Housing	No
Housing Emergency	Immediate housing assistance for Clients or families facing homelessness or crisis situations.	Recording emergency shelter stays, assessing crisis needs, and linking Clients to rapid rehousing programs.	Yes	No calendar	No	No
Volunteer Events	Activities or events where volunteers contribute their time and skills to support the organization's mission.	Scheduling volunteer opportunities, tracking participation, and logging volunteer hours for reporting.	No	Volunteer Event	Store Location or Volunteer	Any

Resource Category	Description and Other Functionality Available	Use Case	Specialized Check In Manager	Calendar	Required Provider Category	Required Usage Category
Front Office	Administrative and reception-related services that support Client interactions and case management.	Designed to manage inquiries, appointments, and general operations, with a specific capability for hourly check-ins but not check-outs. Primarily used for tracking presence rather than full attendance cycles.	No	Front Desk	Front Desk	Any
Cemetery	Resources and services related to burial assistance and memorial support for individuals in need.  Bereavement Functionality	Documenting burial services, tracking financial assistance for burial costs, and maintaining records for case management.	No	No calendar	Cemetery or Funeral Home	No
Encounter	Any interaction between a Client and a caseworker, service provider, or staff member.  Encounter Functionality	Logging case management meetings, counseling sessions, or service touchpoints for reporting and follow-up.	No	No calendar	No	No
Group Service Time	A service or activity provided to multiple Clients at the same time.  Group Functionality	Recording group counseling, support groups, community meals, or educational sessions.	No	No calendar	No	No

Resource Category	Description and Other Functionality Available	Use Case	Specialized Check In Manager	Calendar	Required Provider Category	Required Usage Category
Medication Administration	The process of managing and dispensing medications to Clients under supervision.  Health Management Functionality	Tracking medication schedules, logging administered dosages, and ensuring compliance with medical protocols.	No	Medication	Front Desk	Any
Event – In/Out	A structured event where participants check in and out for attendance and tracking purposes.  Child Care Functionality After School Functionality	Primarily used for tracking student check-ins and check-outs, whether they are participating in activities within a facility or out in the community. This feature is a key component of the Child Care and After-School functionality and is primarily used to document the caregiver checking the student in and out of the facility.	No	In and Out or Child Care	Front Desk	Any
Meals on Wheels Event	A scheduled event for delivering meals to homebound Clients in the community.  Meals on Wheels Functionality	Logging meal deliveries, tracking Client participation, and reporting service impact.	No	Meals on Wheels	Meals On Wheels	No
Workshop Series	A structured sequence of training sessions or educational events.	Managing Client enrollment, tracking completion rates, and evaluating program effectiveness.	No	Workshop	Any	Any

Resource Category	Description and Other Functionality Available	Use Case	Specialized Check In Manager	Calendar	Required Provider Category	Required Usage Category
Work Therapy / Chores	Activities where Clients participate in work-related tasks or household responsibilities as part of their program.  Work Therapy Functionality Chore Functionality	Recording assigned chores in shelters, logging work therapy hours, and tracking skill-building activities.	No	Chores	Work Therapy Location	Work Therapy
Manage Facility	Oversight of facilities, including maintenance, room assignments, and resource allocation.	Assigning rooms, tracking maintenance requests, and managing facility usage for programs.	No	Facility Management	Front Desk	Any
Staffed Housing	Housing facilities with on-site staff that provide aid and supervision.	Managing resident placements, tracking service interactions, and monitoring facility occupancy.	No	Staffed Housing	Staffed Housing	Any
Domestic Violence	Resources and services specifically for Clients affected by domestic violence.  Domestic Violence Functionality	Referrals to shelters, case management for survivors, and tracking legal advocacy efforts.	No	No calendar	DV Shelter	No
Resource Availability	A tool for tracking the availability of specific resources within the organization.	Monitoring open housing units, available class spots, or unassigned volunteer shifts.	No	Staff Scheduler	Resource Availability	Any

Resource Category	Description and Other Functionality Available	Use Case	Specialized Check In Manager	Calendar	Required Provider Category	Required Usage Category
Clinic	<p>A healthcare setting where medical or mental health services are provided to Clients.</p> <p>Health Management Functionality</p>	<p>Scheduling medical appointments, tracking health services, and recording treatment plans.</p>	No	No calendar	No	No