Resources and Usages Resource Guide

March 11, 2025

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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 or 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.

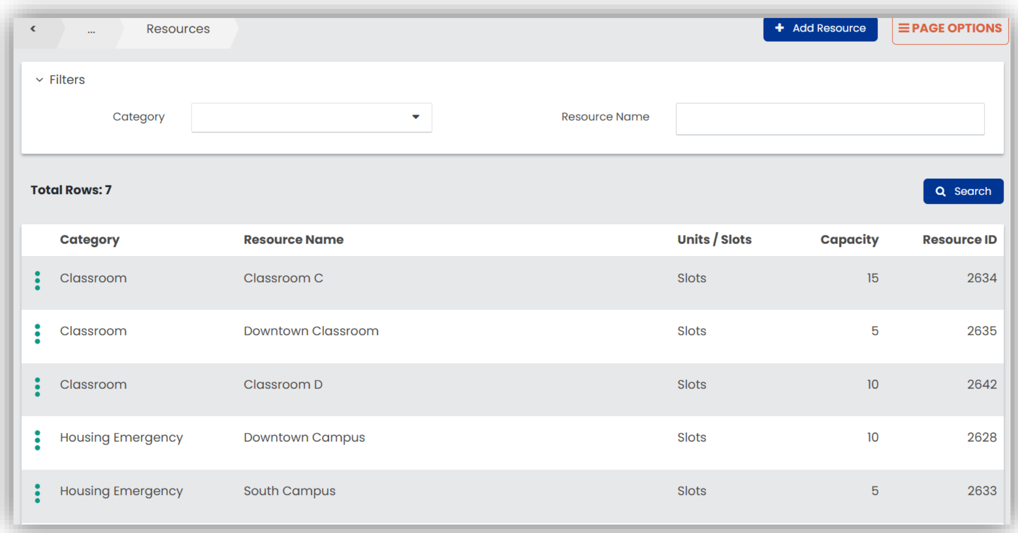
In this example, we will create a Housing Emergency Resource with two locations, which are referred to as Usages. Since these Usages include beds, they will be configured with a Usage Type of “Slots”.

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.

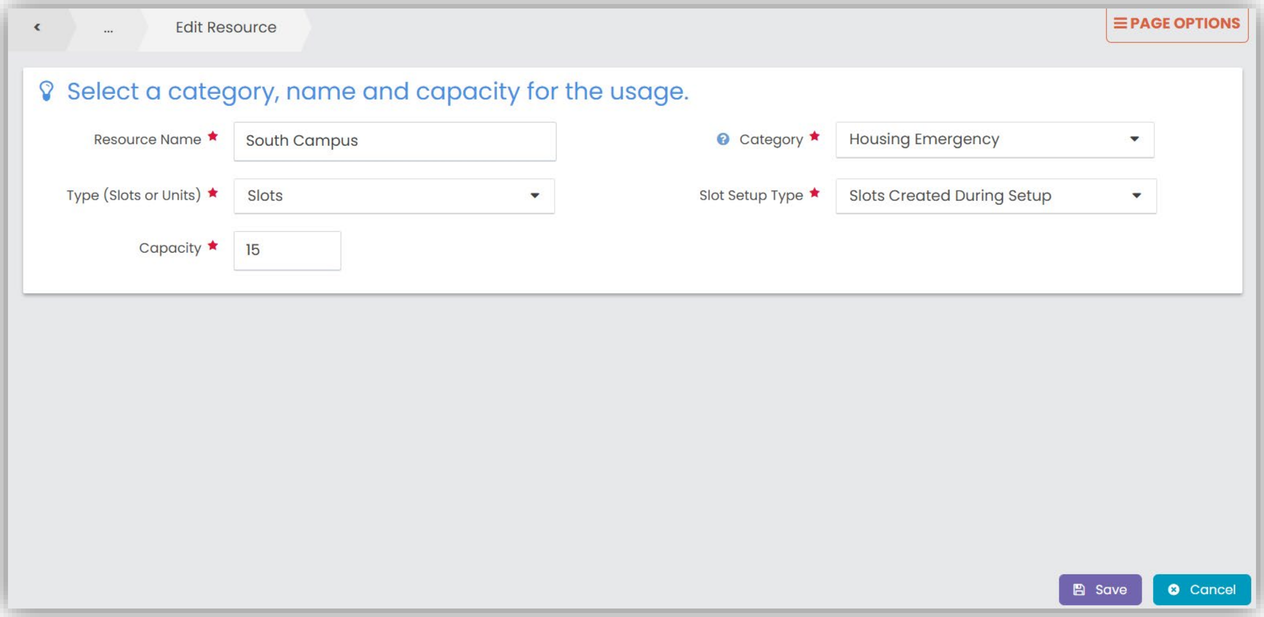
Navigation Administration tab: Setup > Organizations – Organizations menu > Providers – Providers menu > Resources



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.



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.

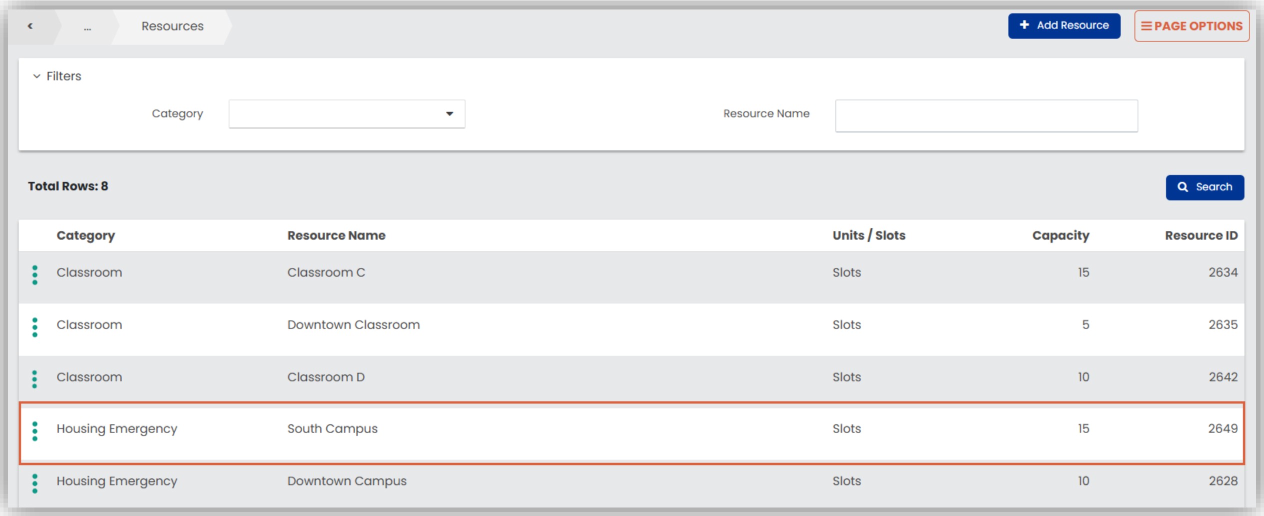
Slot Setup Type determines if the slot should be created when the Usage is initially created by the System Administrator or during the Client check-in process. Because Housing

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.

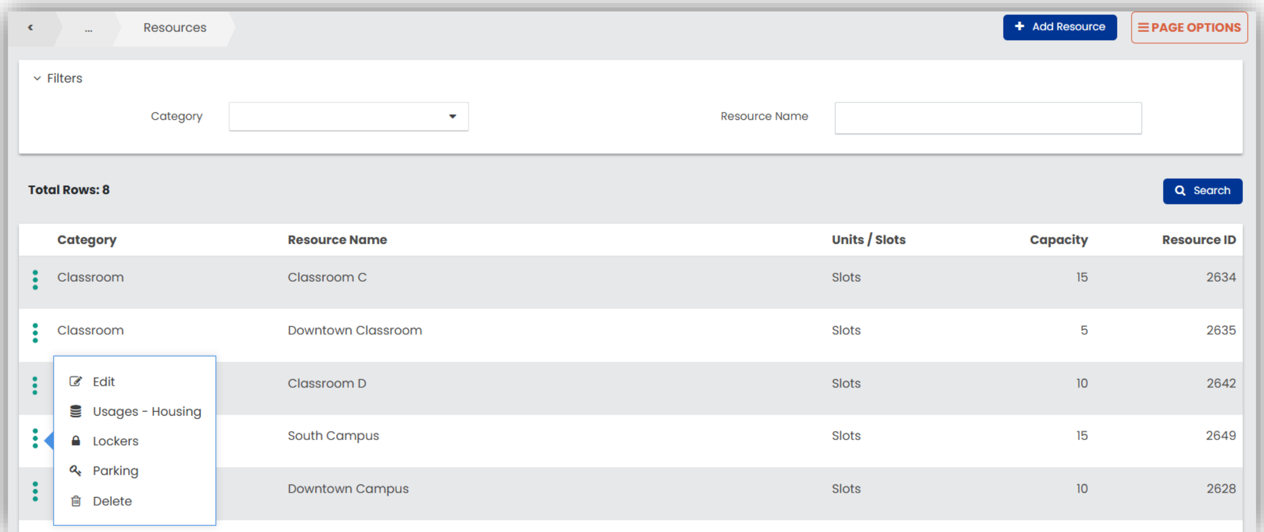
Select SAVE.

The new Resource is now displayed on the summary form.



Resource Menu

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



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.

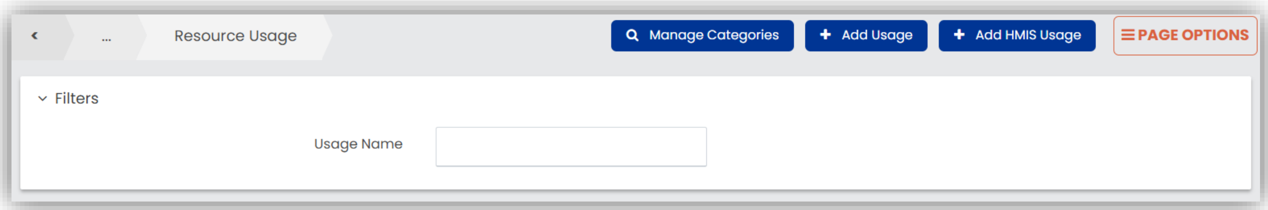
Edit

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.

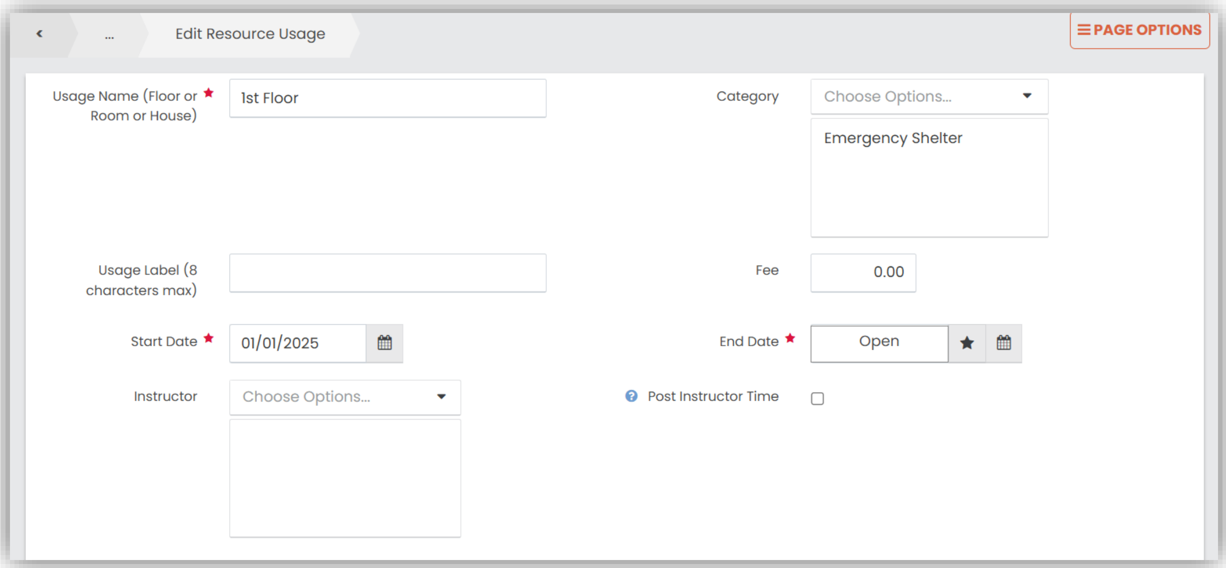
Add any necessary categories before continuing to add the Usages.

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 or support@caseworthy.com.

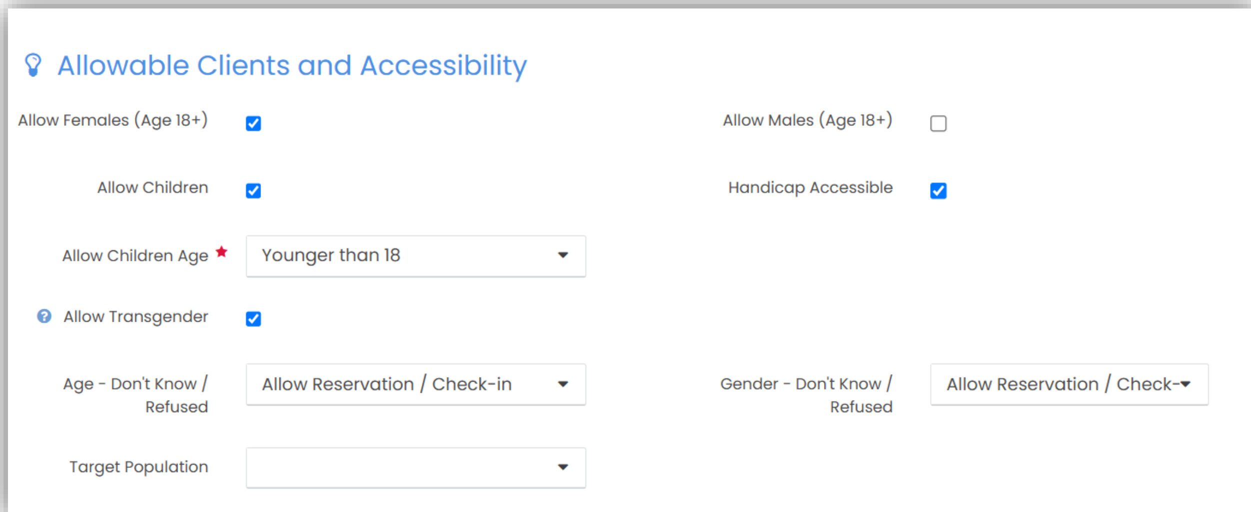
Select **Allow Same Day Reservation** if Clients can make a reservation the same day they will be checking in to the Usage.

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.



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

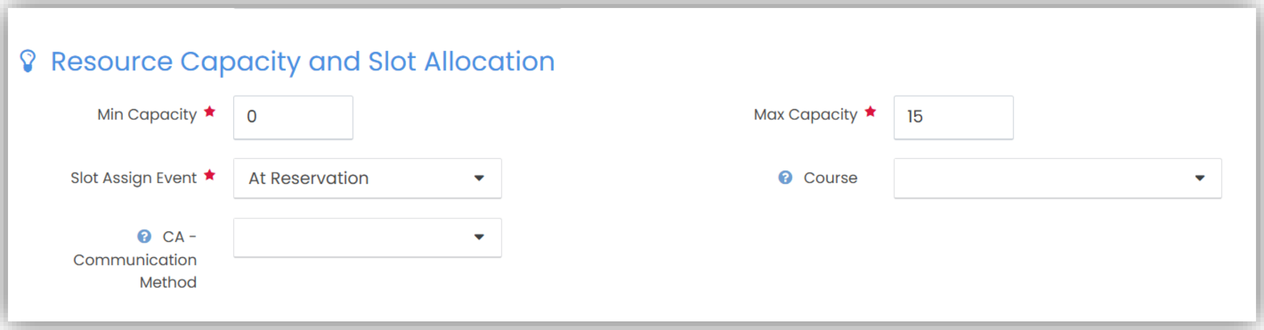
If you select **Allow Children**, an additional field is displayed allowing you to specify the child's age group. Select "Younger than 18" to allow every child access to this Usage.

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.

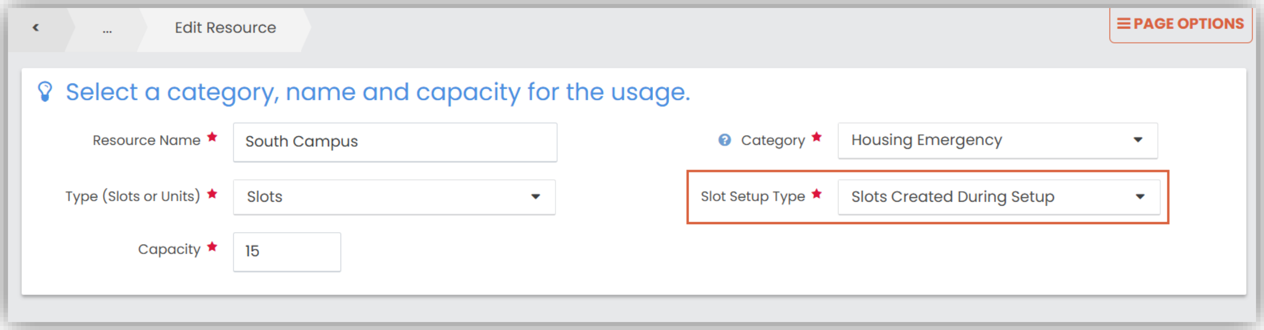
The **Target Population** identifies if the Usage is reserved for certain populations. This information will then be copied into all the Usage slots if they are automatically generated.

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.

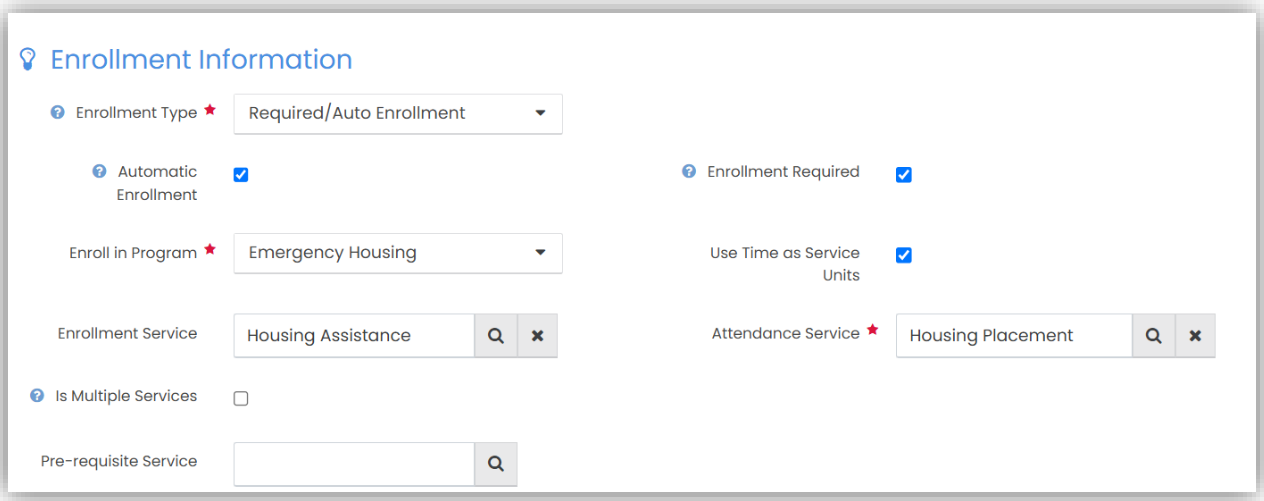
The Contact Preferences section is used to configure when confirmation and reminder emails are sent to the Client about their reservations for the Usage.

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.

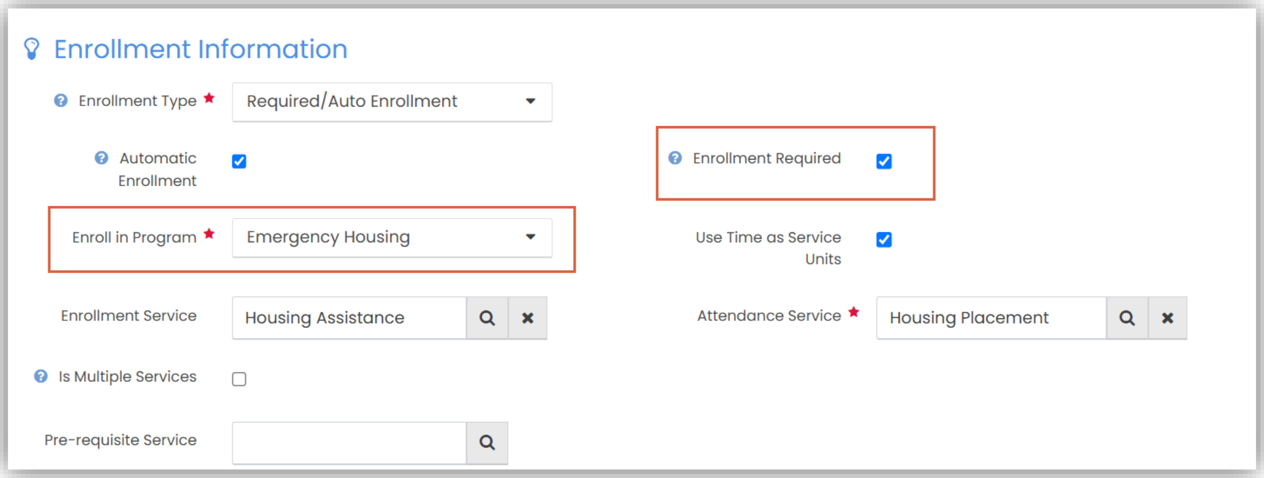


Enrollment Type defines how a program enrollment is managed. Options include "Required/Auto Enrollment", "Enter Enrollment", "Enter Enrollment Optional", and "No Action Required".

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.

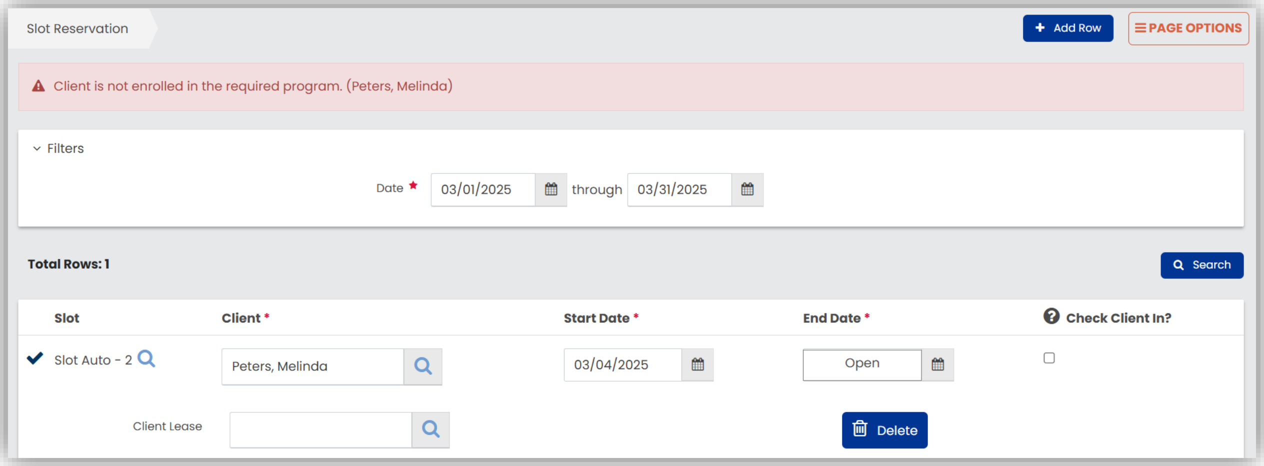


Select **Enrollment Required** if the Client must be enrolled in the specified program to access this Usage.

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:

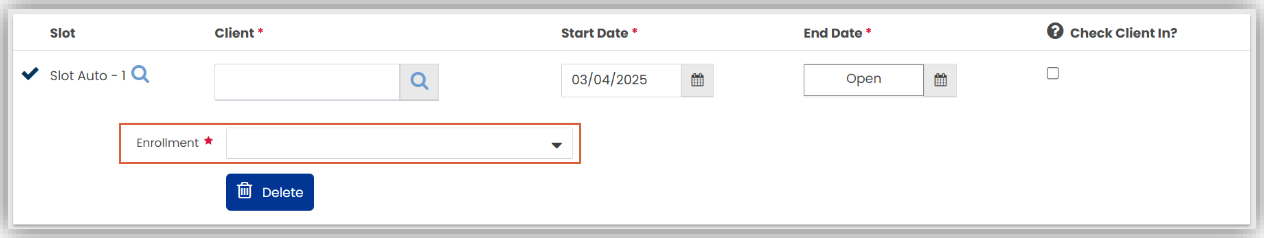
- When **Enrollment Required** is selected, the Client will not be allowed access to this Usage if they are not already enrolled in the program identified in **Enroll in Program**.



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

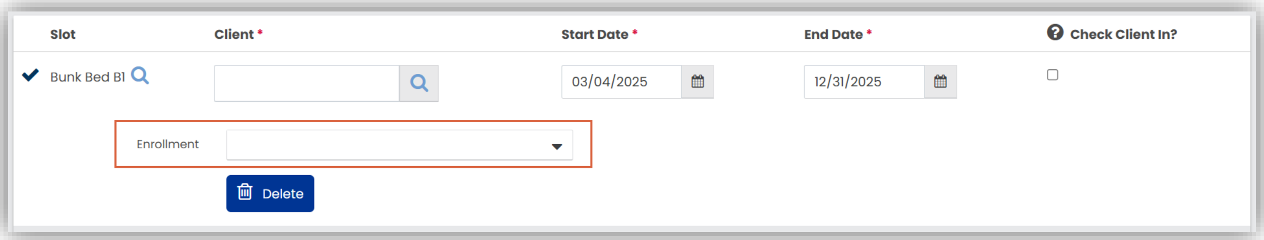
Enter Enrollment

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



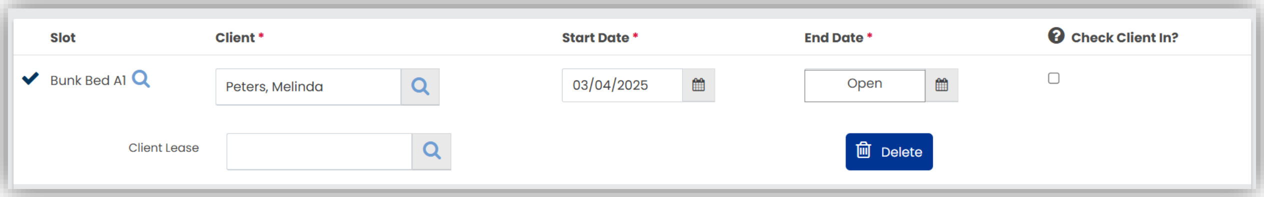
Enter Enrollment Optional

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.



No Action Required

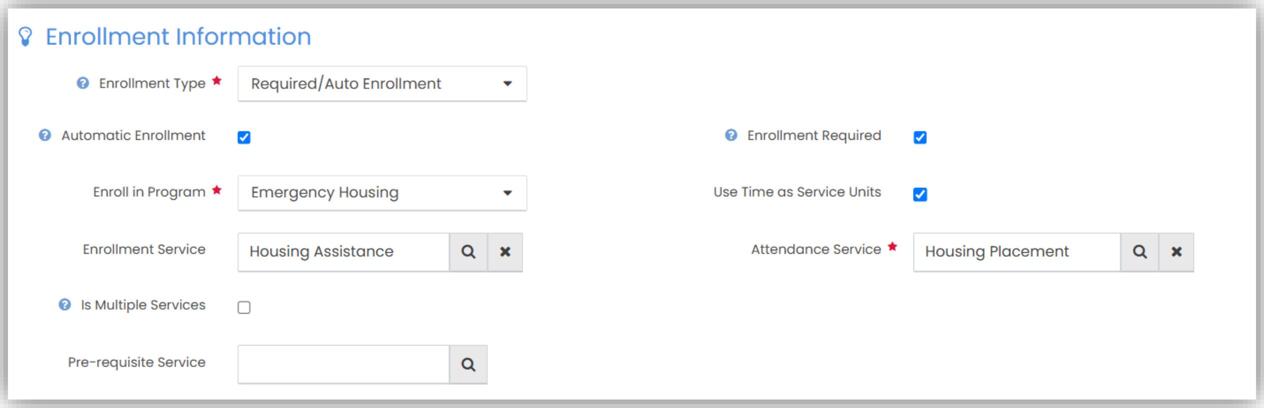
When "No Action Required" is selected, the User entering the reservation or during check-in will not be presented with an option to select a program enrollment. If this option is selected, the Usage will not be reportable in association with a program.



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.



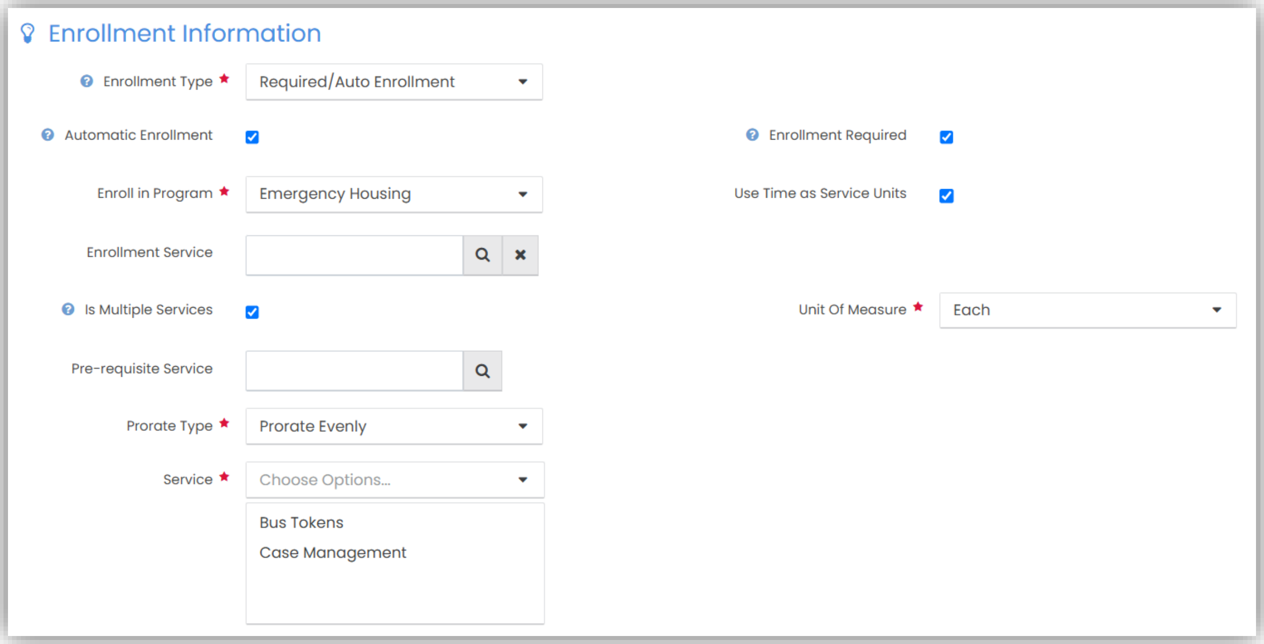
Next is **Use Time as Service Units**. When selected, the unit of time will be used rather than the unit configured for the service. This field is not required.

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.

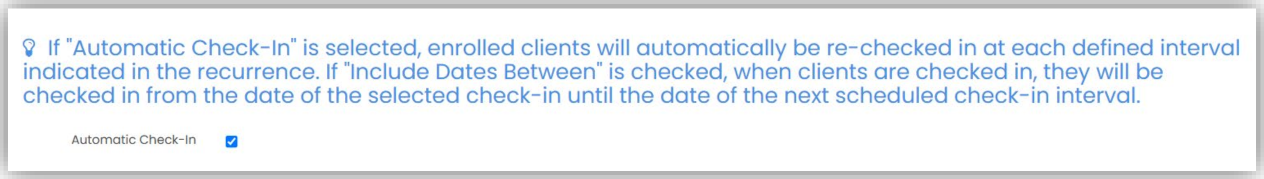
Options include:

- "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.

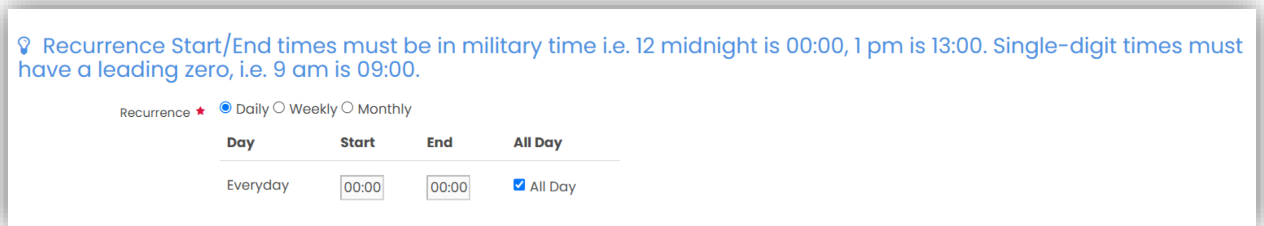


Recurrence sets when the Usage is available.

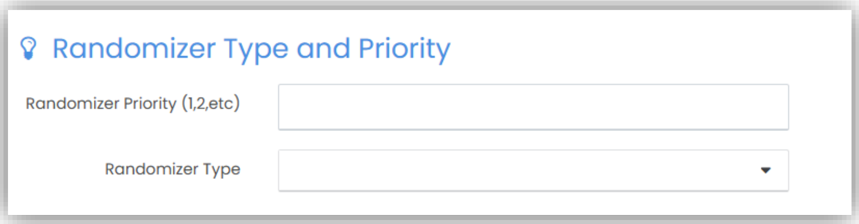
For example, a "Housing Emergency" Resource is typically always available. You should select "Daily" and "All Day" for this Usage.

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.



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



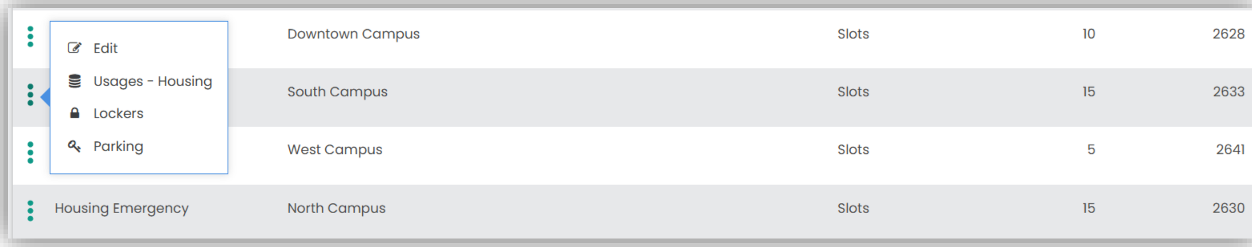
For example, creating an overflow waitlist for Clients or increasing available Usage on a seasonal basis. If utilized, further configuration is available on the Organization tab through the Randomizers menu.

Lockers

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

Let us start with lockers.

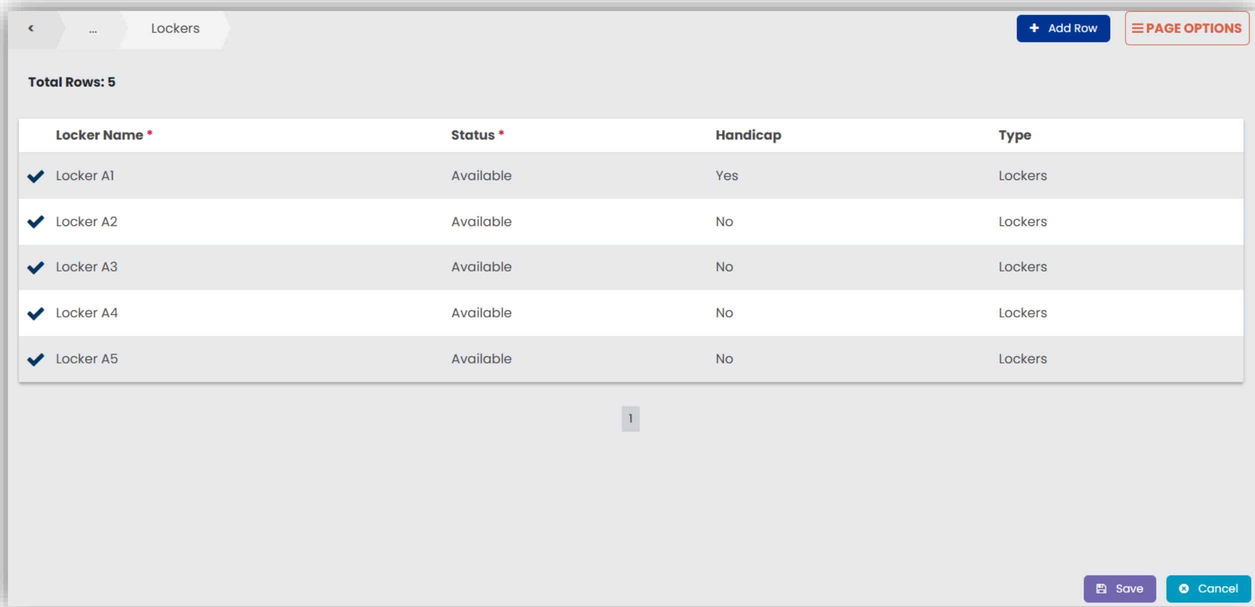
Once lockers are created, they can be associated with specific Usage slots or assigned to Clients.



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.



Give the locker a name.

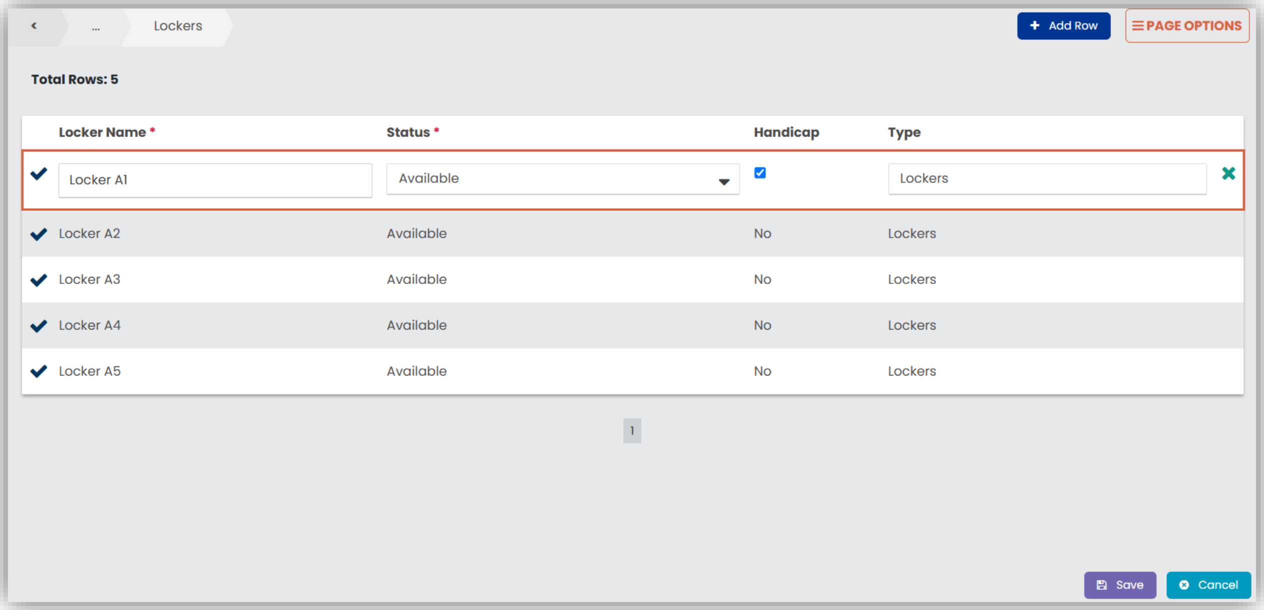
Select the **Status** of the locker, which is essentially its availability. Options include "Assigned", "Available", "In Development", and "Under Repair".

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.

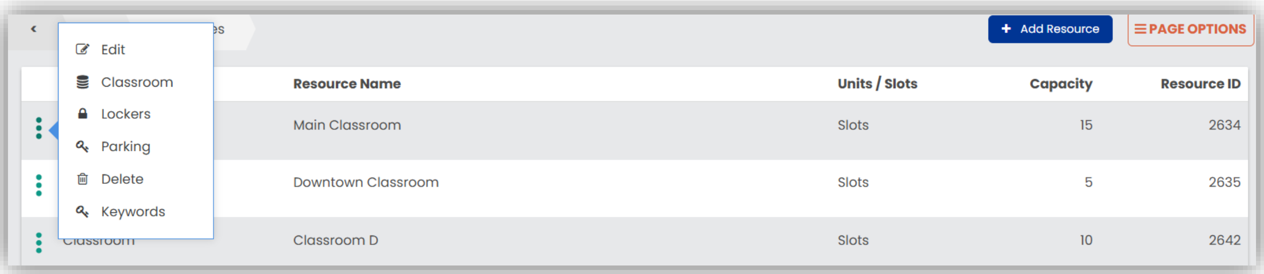


Click SAVE when done.

Parking

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

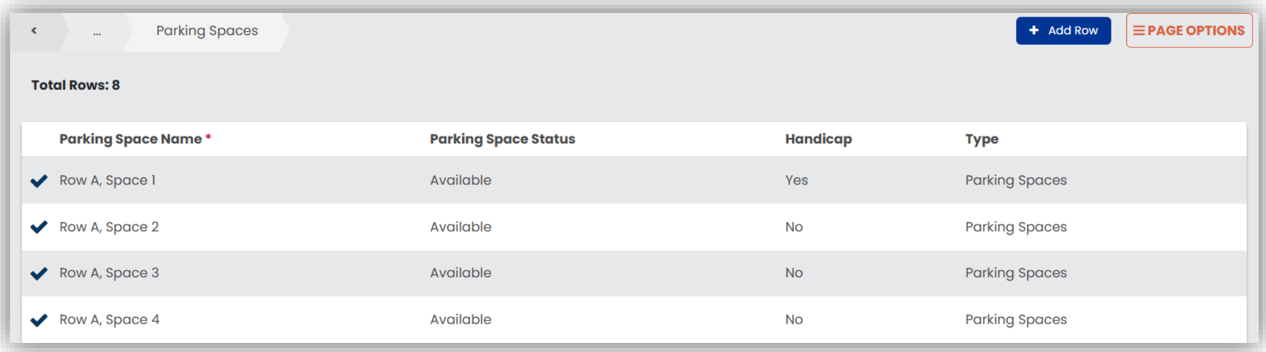
Once parking spaces are created, they can be associated with specific Usage slots or assigned to Clients.



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.



Give the space a name.

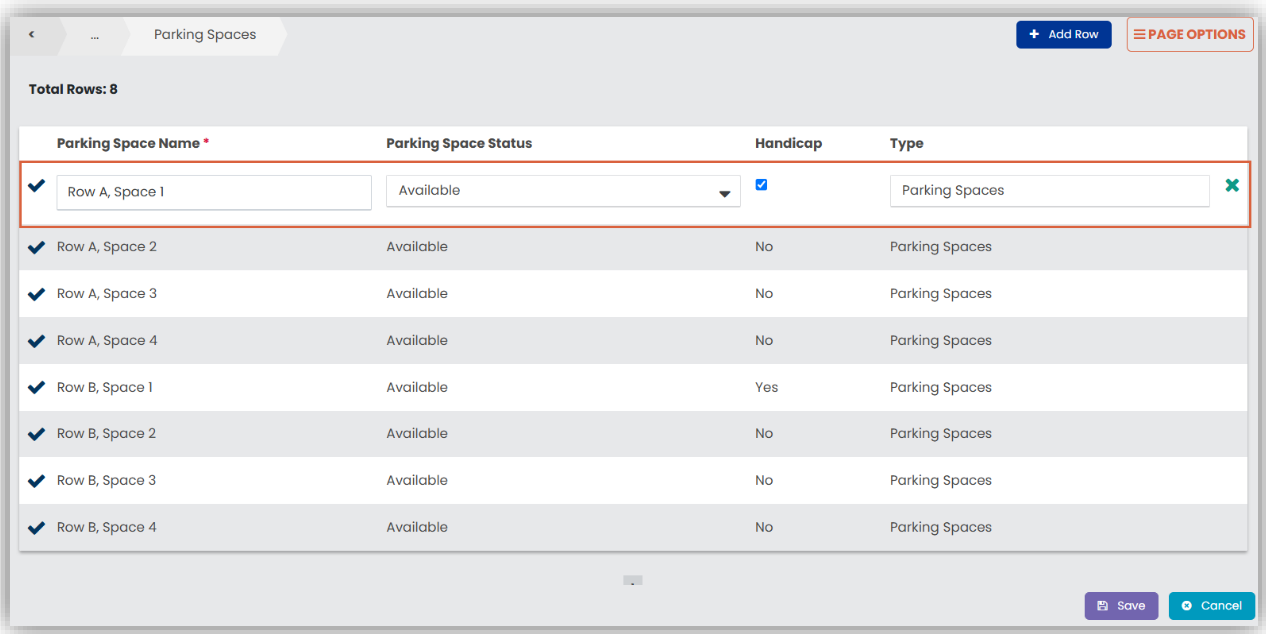
Select the **Status**, which is essentially its availability. Options include “Assigned”, “Available”, “In Development”, and “Under Repair”.

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.



Click SAVE when done.

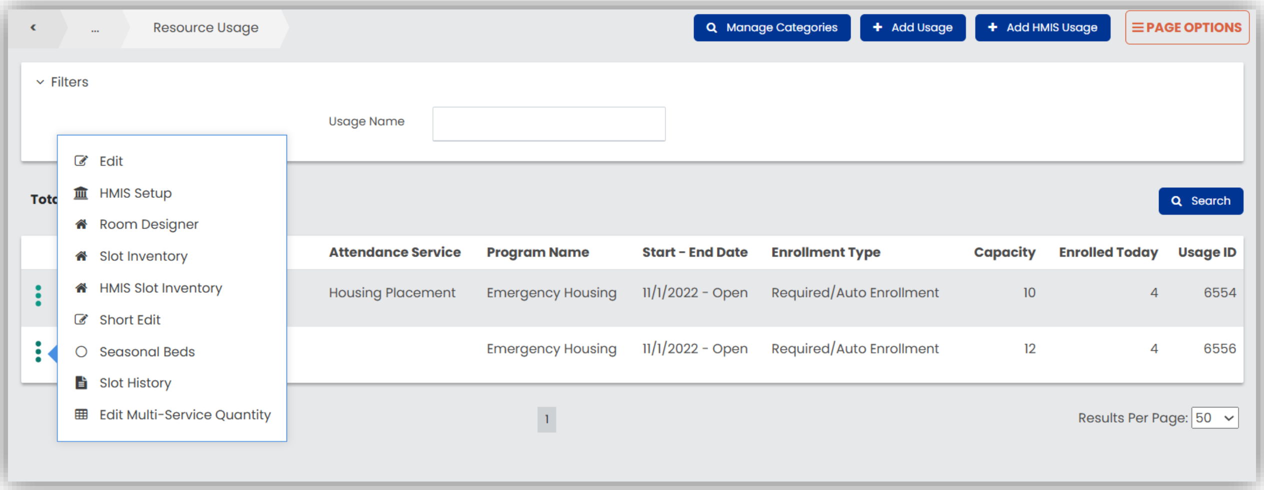
Delete

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.



Slot Inventory

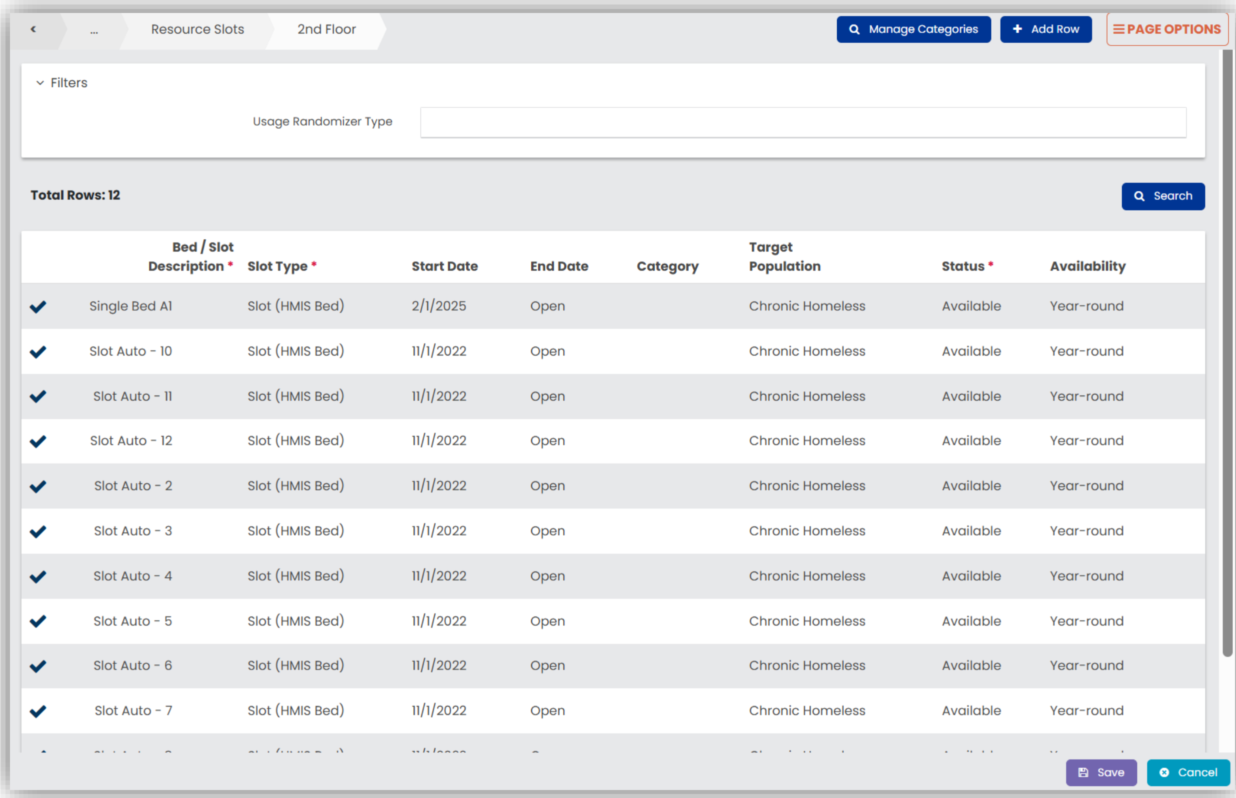
The next most logical step is to set up the Usage's slots. Slots can be created and managed using either Slot Inventory or the Room Designer. We will explore Slot Inventory in this example.

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.



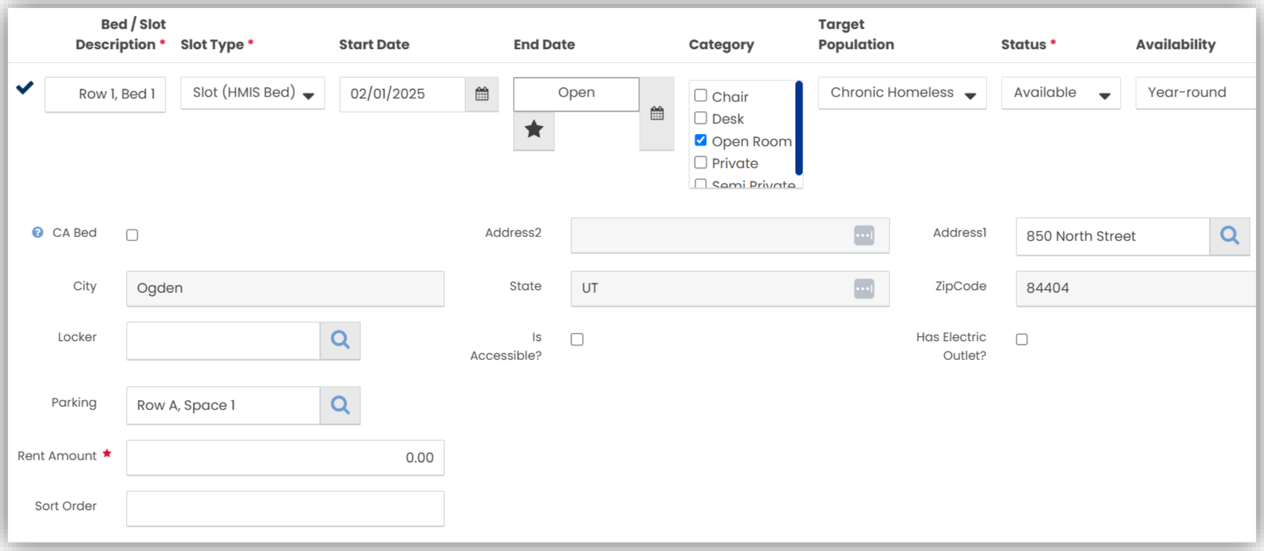
Each automatically generated slot for this Usage displays, including the identifying description, type, availability, and status based on our selections.

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.



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.

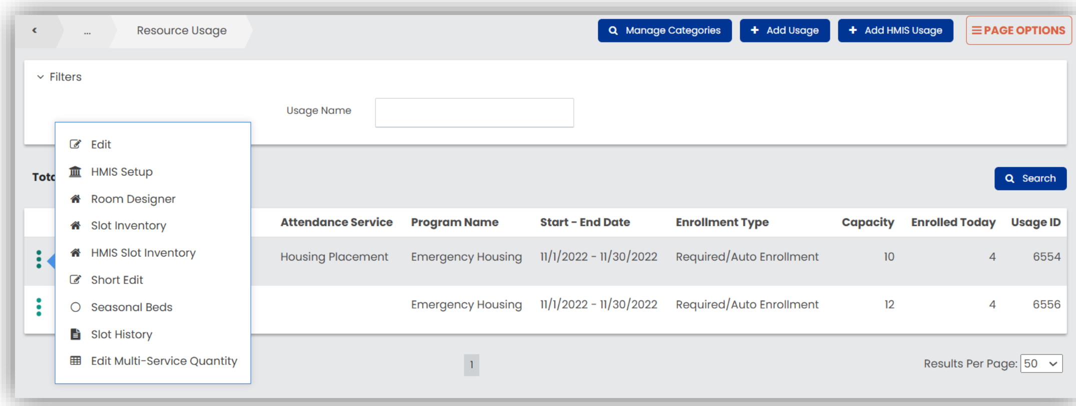
Sort Order determines how the slot appears on forms in relation to the other slots. This field is not required.

	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

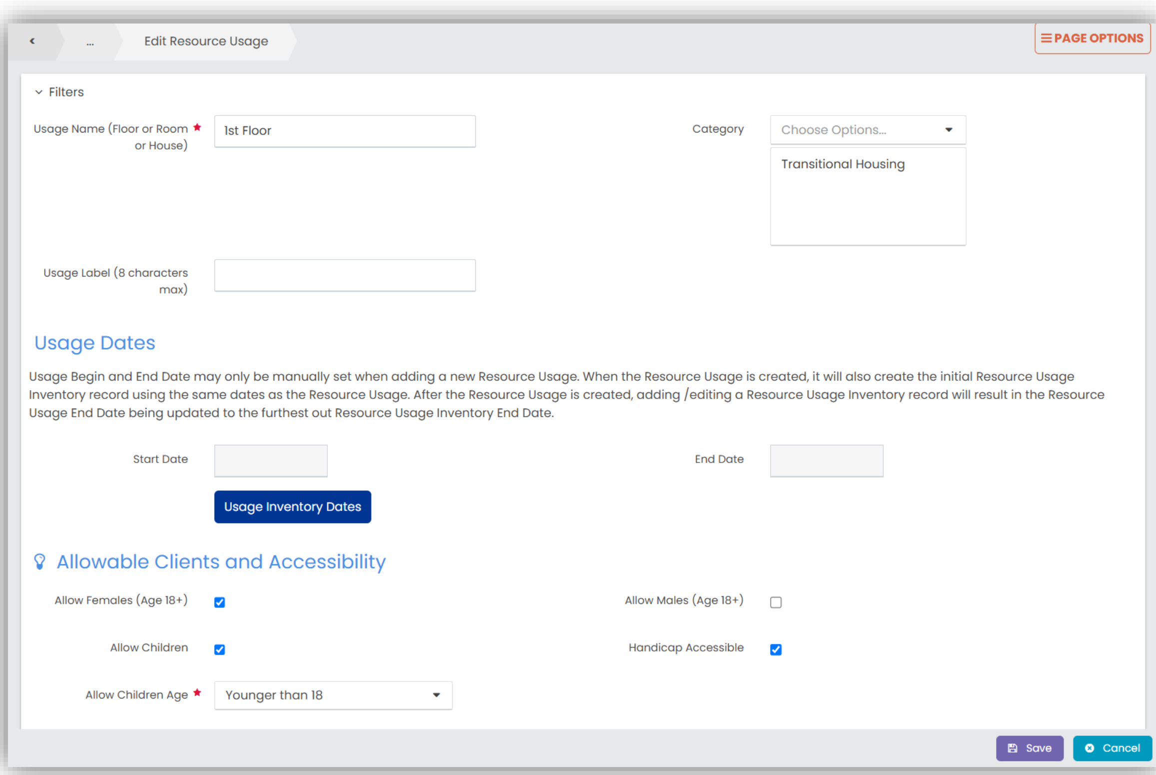
Let us open the Usage menu again and review the other options available, starting at the top.



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

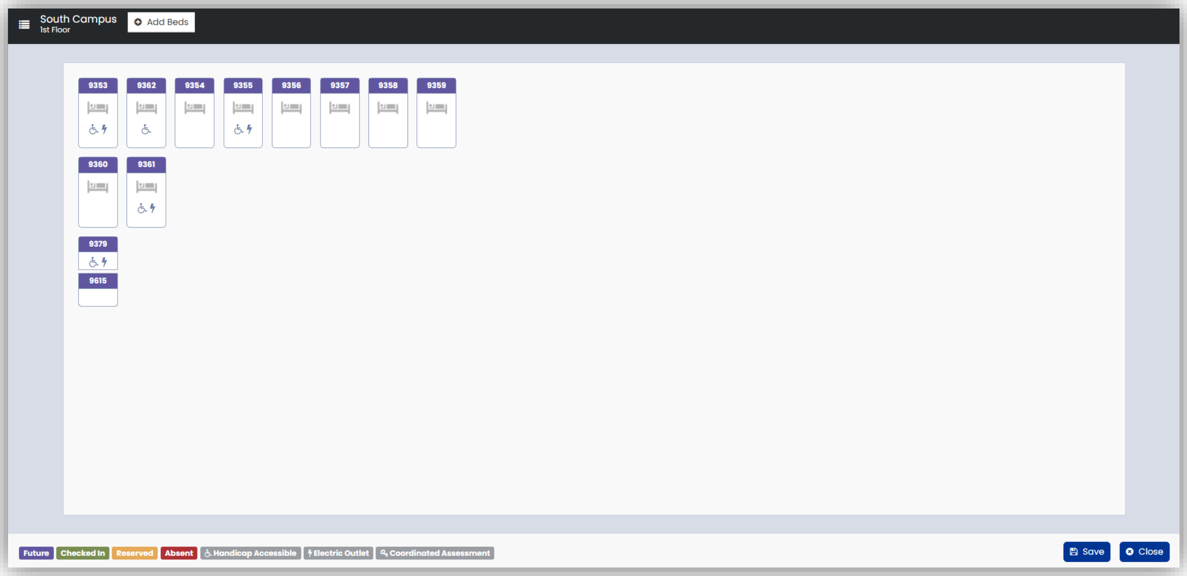
HMIS SETUP

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.



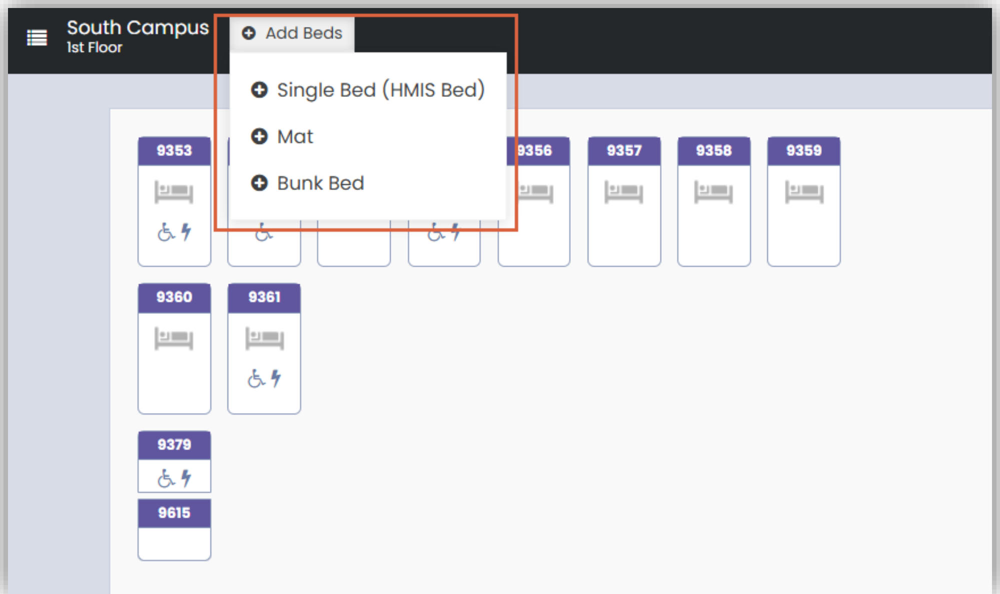
Room Designer

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.

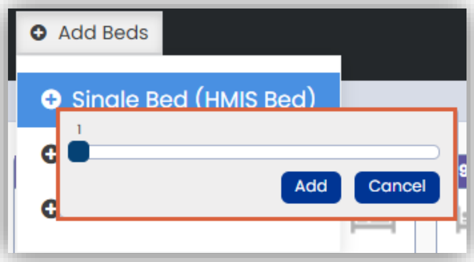


The slots displayed here were automatically generated based on the Usage capacity entered during setup.

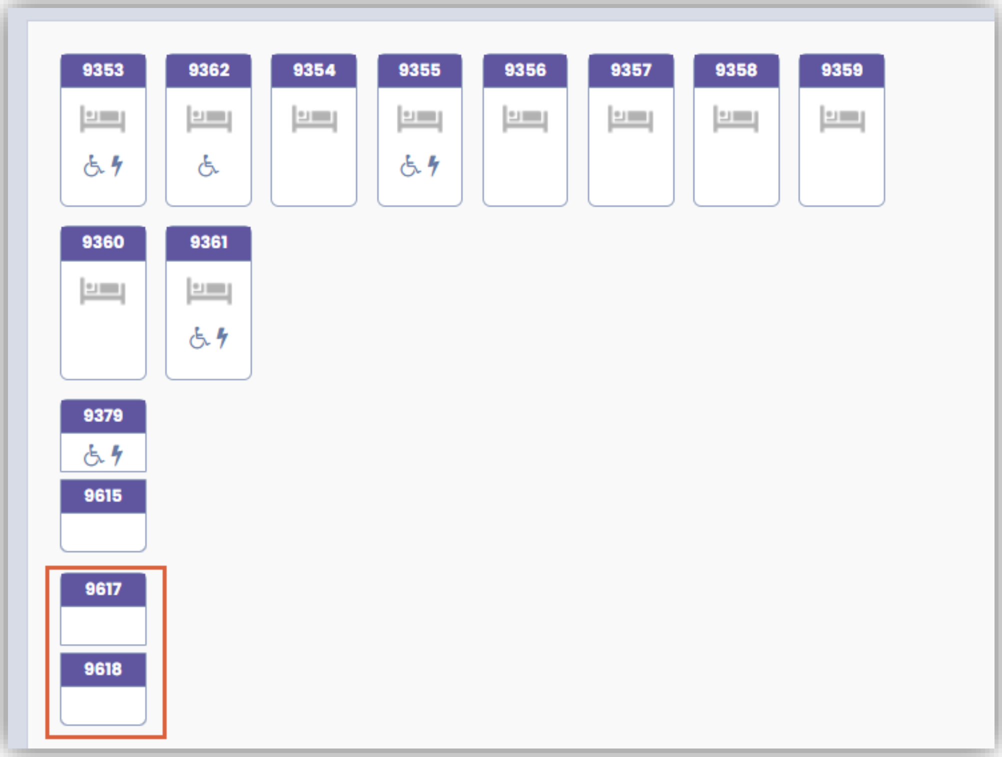
Use ADD BEDS to add slots within the Room Designer, including single beds, mats, or bunk beds.



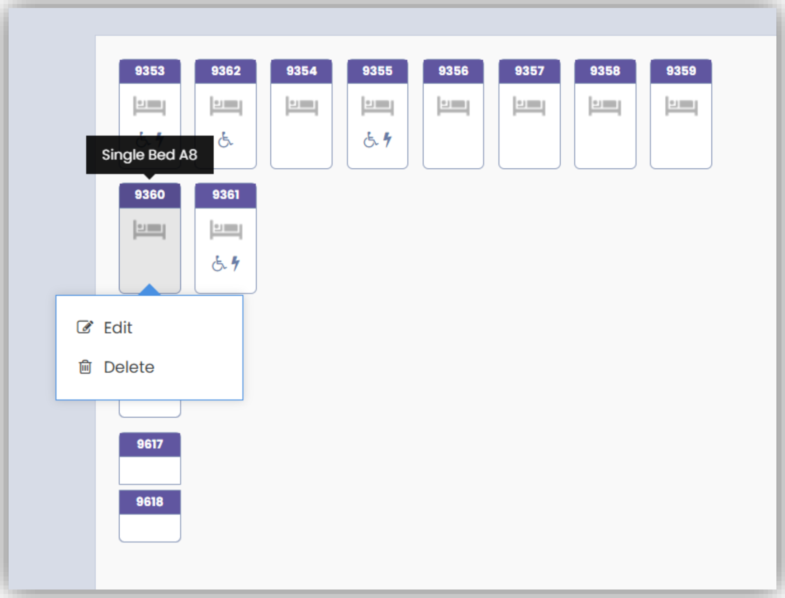
When you select the bed option, you are then prompted to select how many beds to add. Use the slider, and then select ADD.



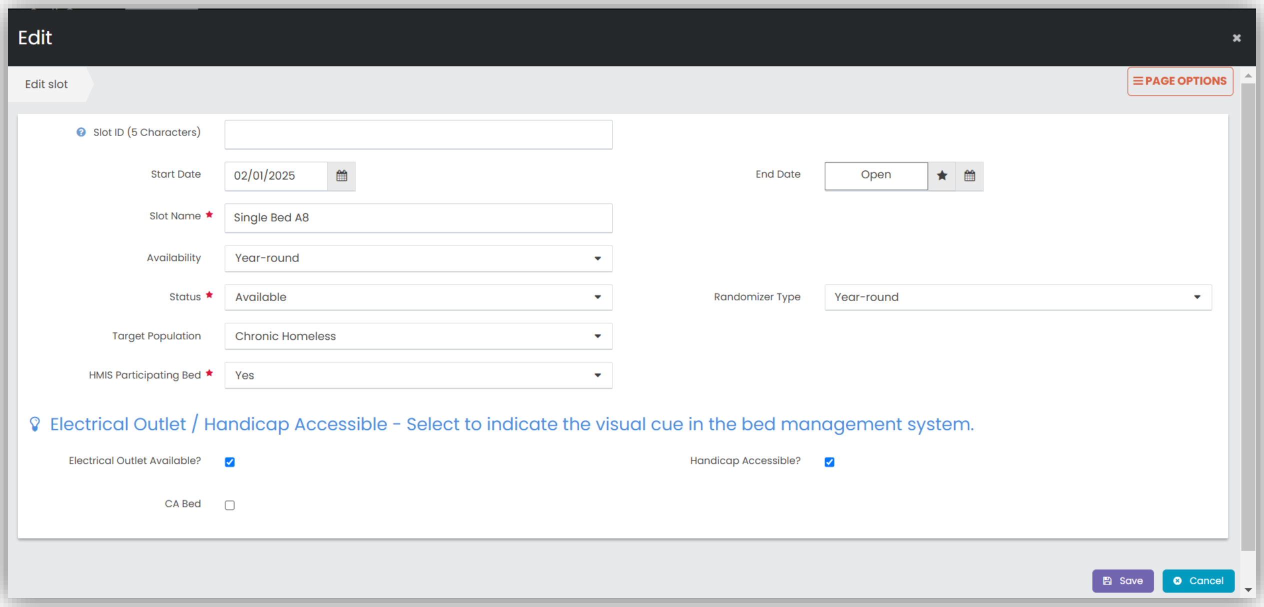
The Room Designer then updates to reflect the initial inventory plus the newly added slot. The bunk bed option creates two slots that will appear together.



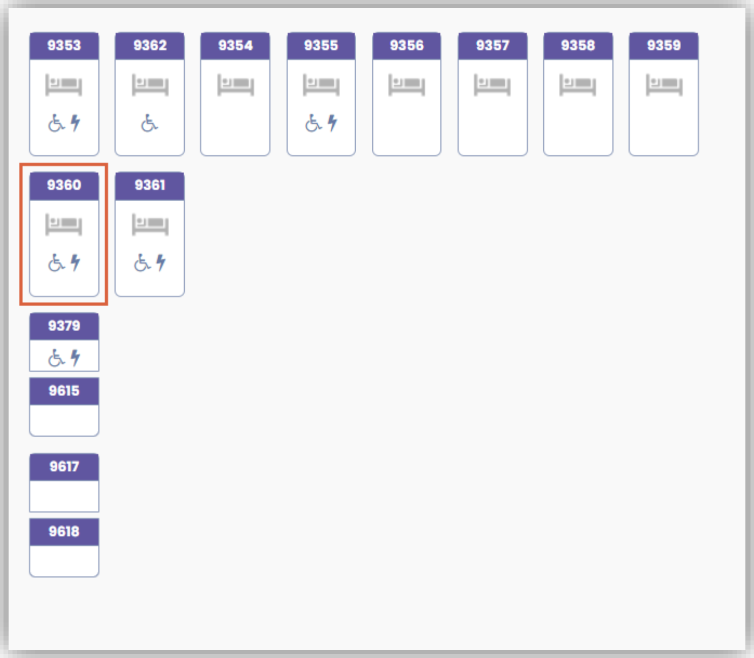
Select any slot to reveal its menu. Choose Delete to delete the slot or select Edit to update its details.



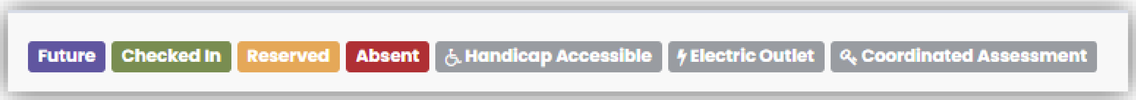
In the *Edit* window, you can update the slot's availability, name, status, accessibility, and more.



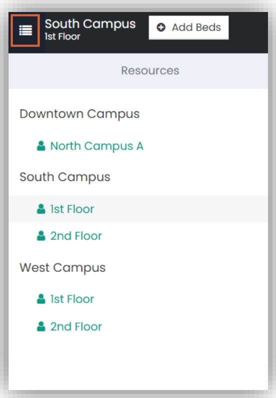
Notice now, slot 9360 now displays icons indicating it is handicap accessible and has an electrical outlet.



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.



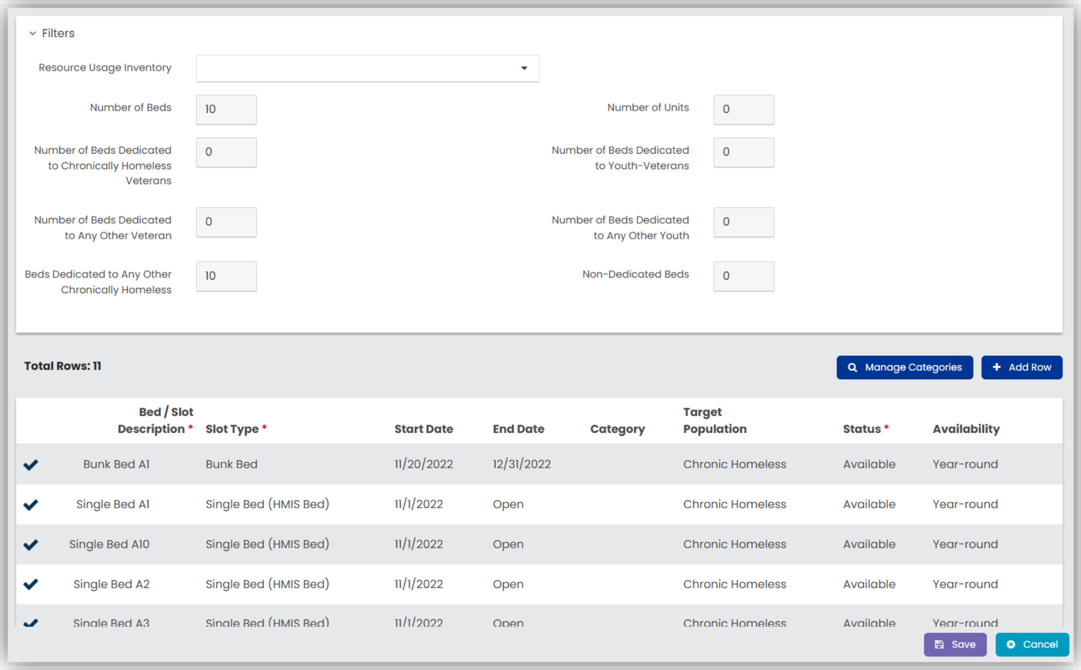
The View Resources menu in the top left corner allows you to quickly access the Room Designer for the Provider's other Resources.



Select SAVE to record the slot inventory changes.

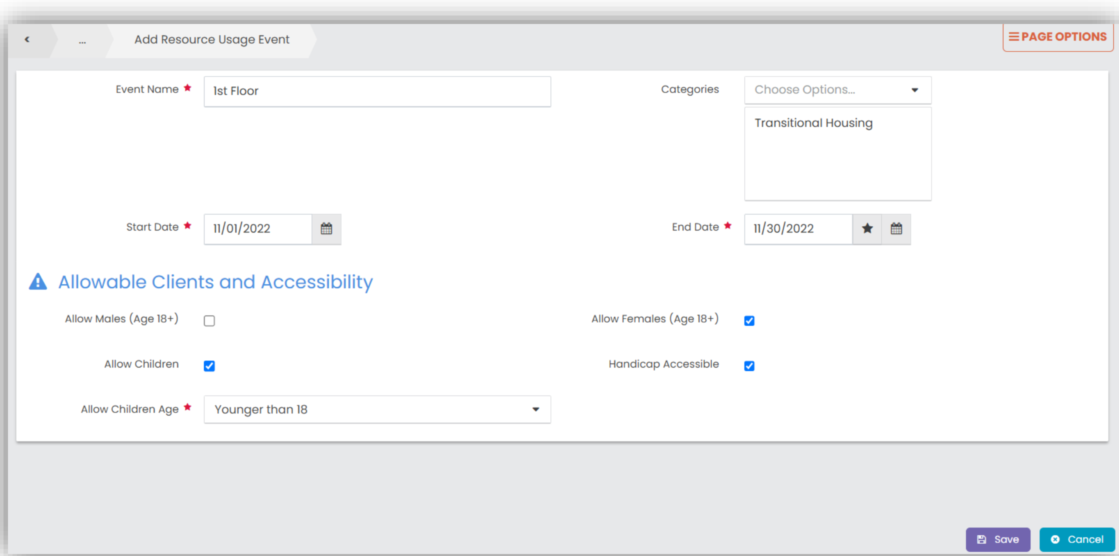
HMIS Slot Inventory

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



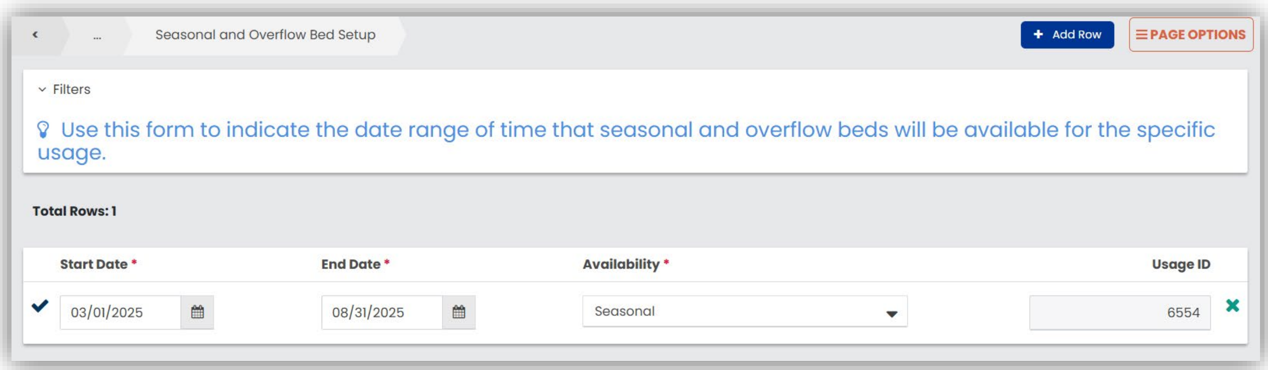
Short Edit

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



Seasonal Beds

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



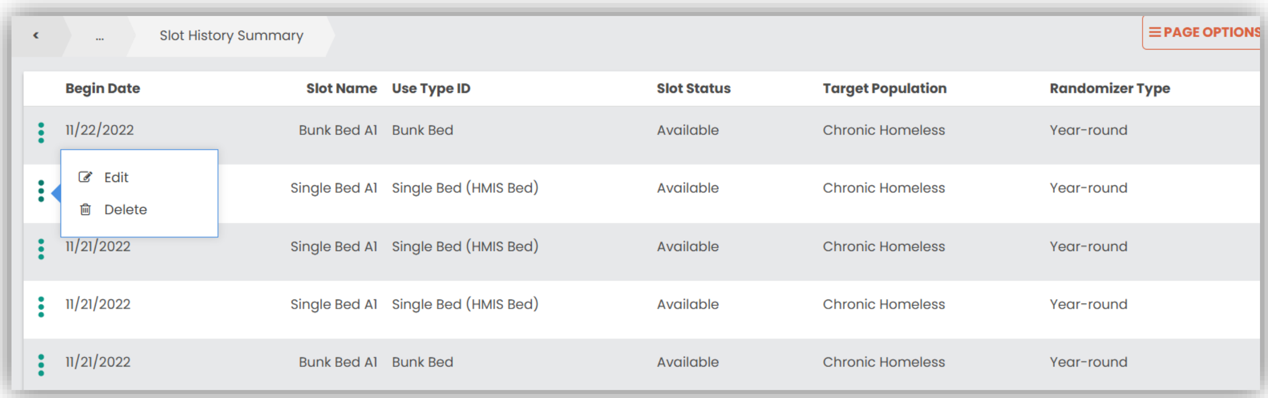
For example, if there is an extra bed available during the spring and summer months to accommodate an additional Client. This bed might only be available from March 1st through August 31st.

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.



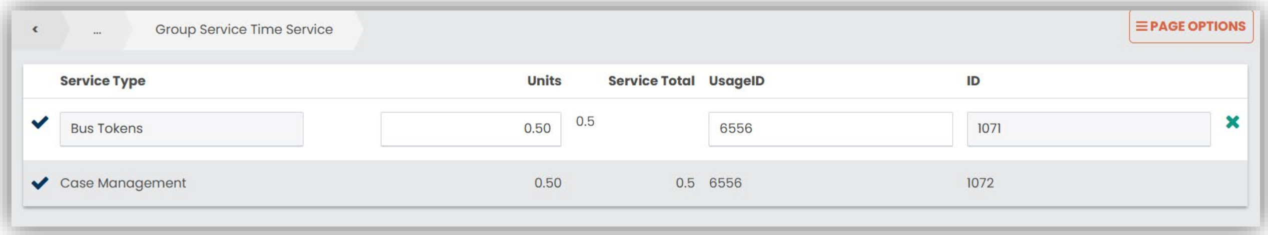
The details for each slot are displayed, and each slot can be edited or deleted from its menu as needed.

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.

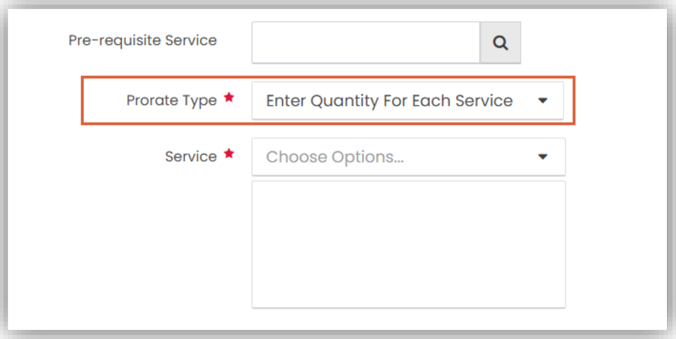
Edit Multi-Service Quantity

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



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.

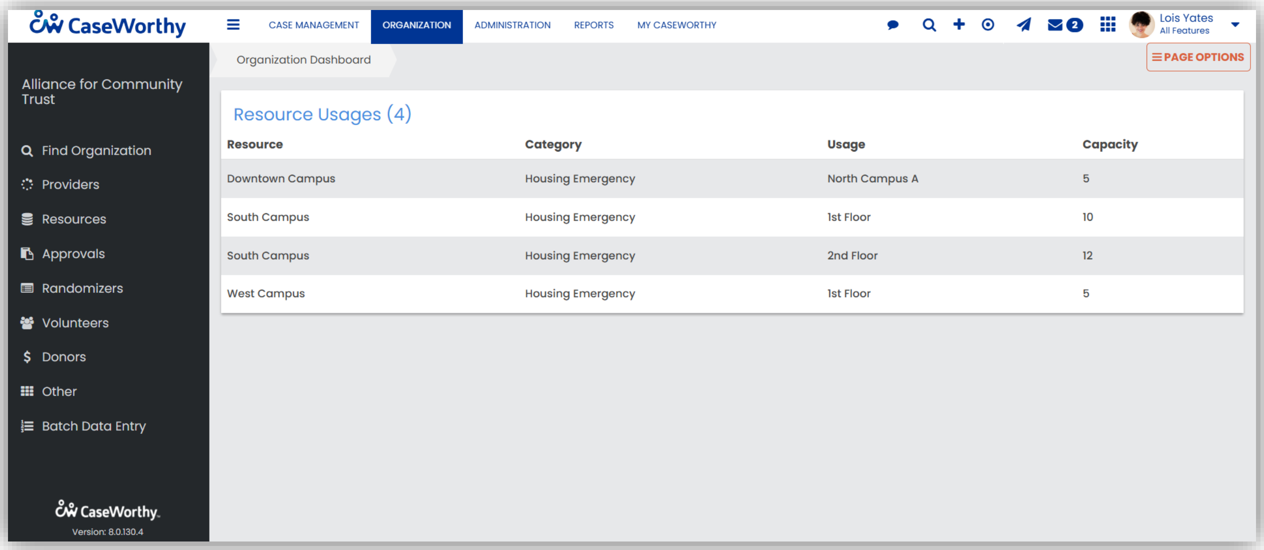
Housing Emergency reservations can ONLY be made on the Organization tab. Before getting started, ensure the correct Organization is loaded in the Entity Corner to maintain accurate records.

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.

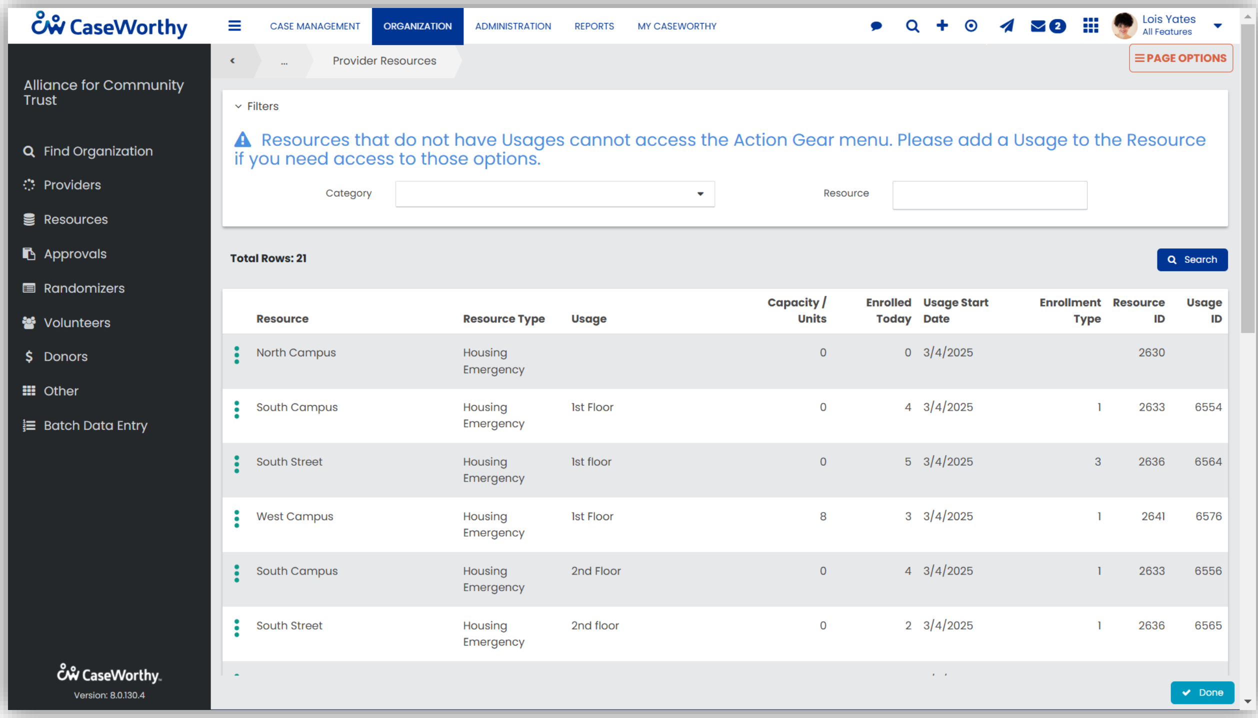


Notice the Resource we created in our example now includes a second Usage called “2nd Floor”. The second Usage is for the second floor, allows men, and only provides for a single service.

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

Provider Resources Form

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



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

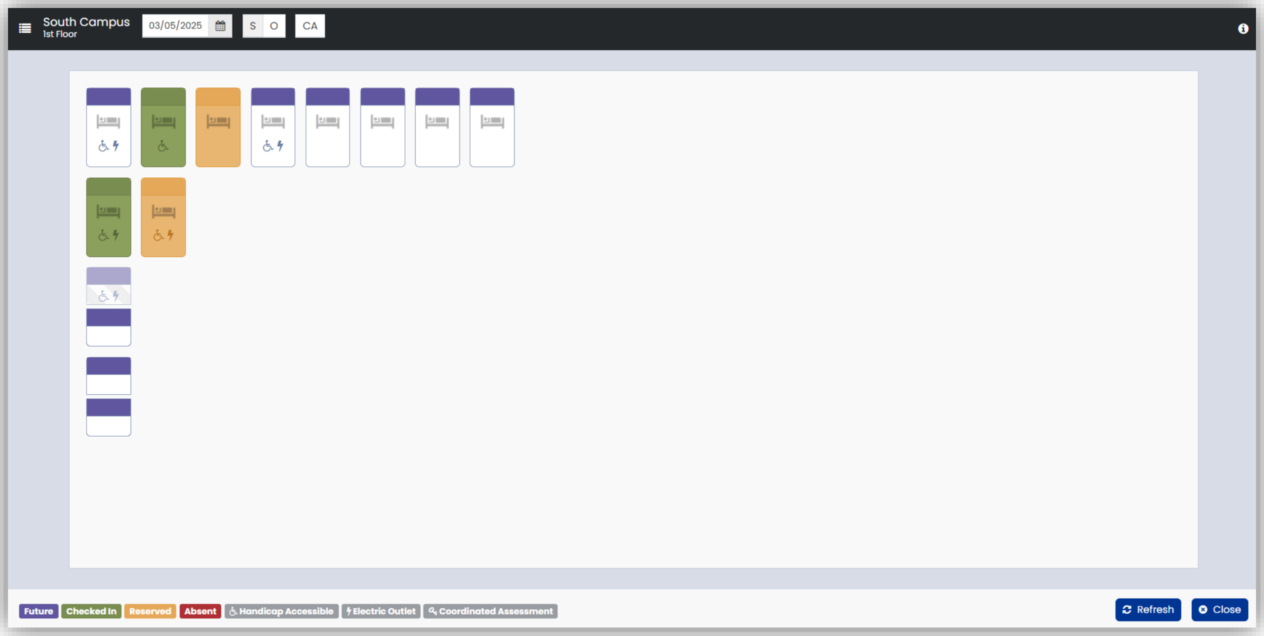
The options available on the Usage menu will vary based on the number of services the Usage is set to track. A Usage can be configured to record a single service or multiple services.

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

Slot Check in Manager

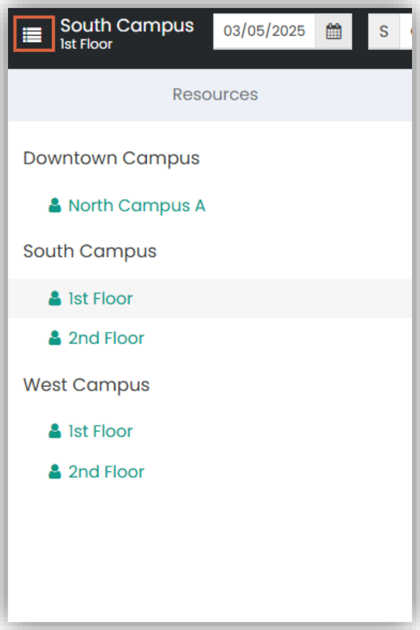
Off the Usage menu, select Slot Check In Manager.

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.

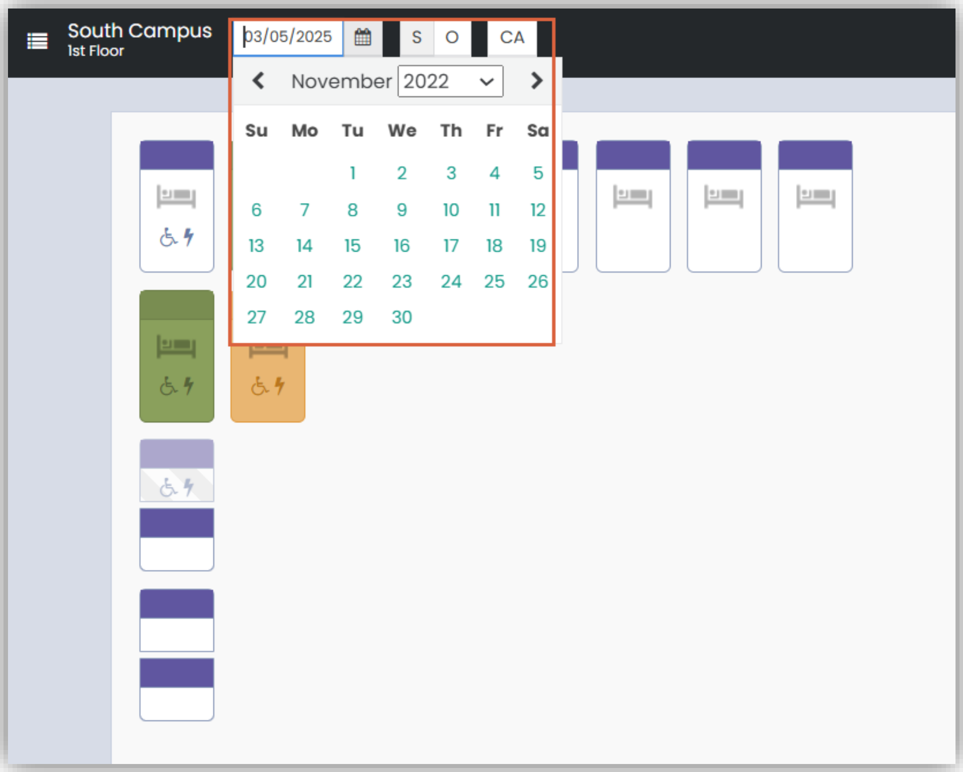


At the top, there are multiple options available.

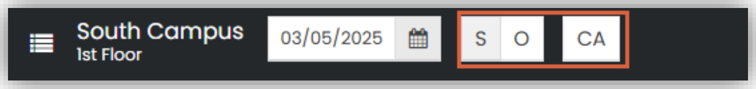
The View Resources menu in the top left corner allows you to quickly access the Slot Room Manager for the Organization's other Resources.



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

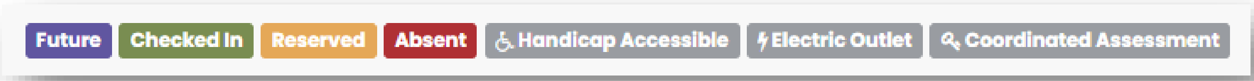


The three buttons at the top display or hide specific bed types.



- 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.



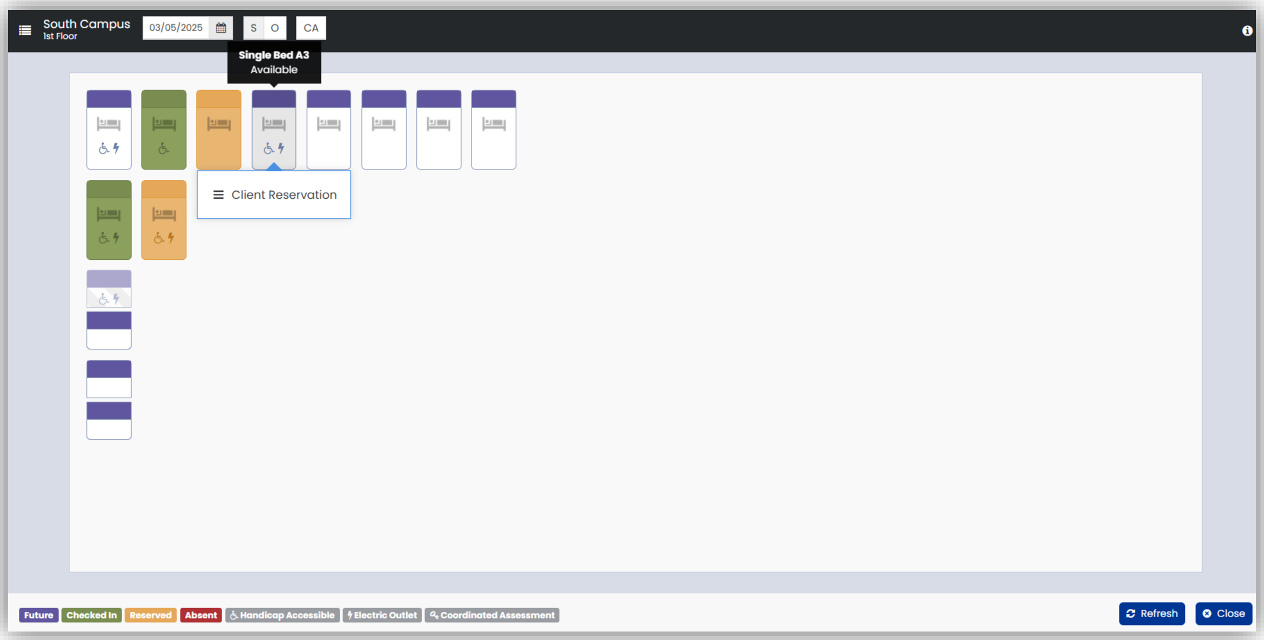
Slots that are reserved are highlighted in yellow.

Slots that are checked into are highlighted in green.

Slots that are available are highlighted with purple.

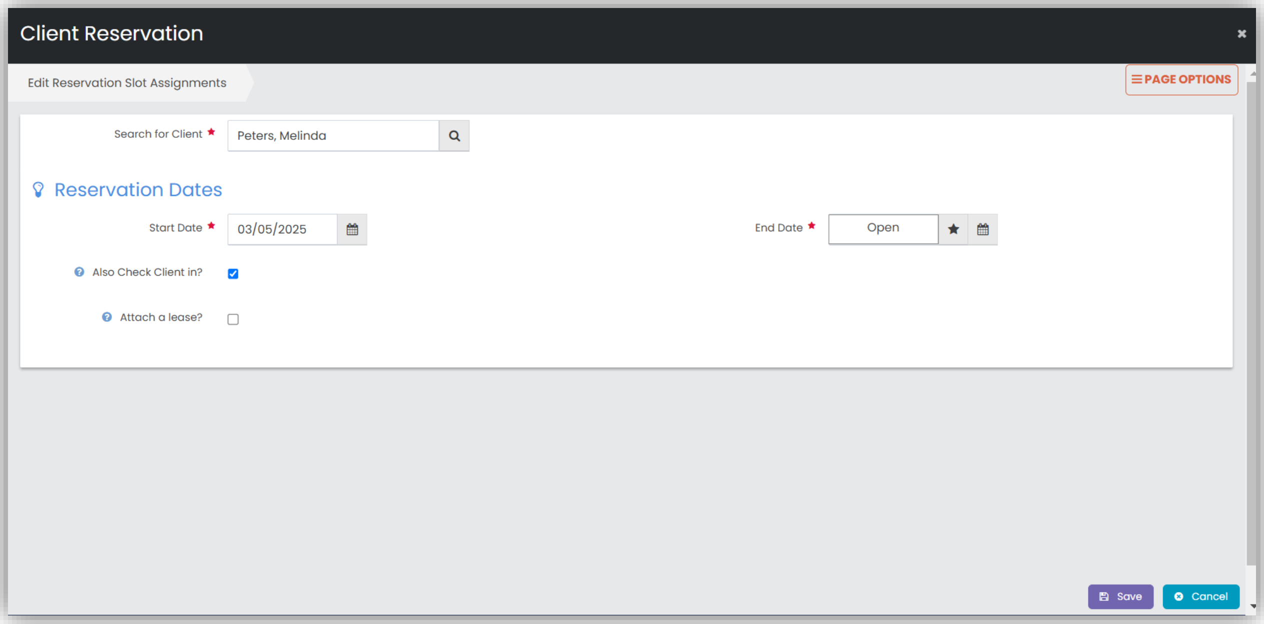
Also, notice that slots that are handicapped accessible or have an electrical outlet display images representing these features.

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



The *Client Reservation* window is displayed.

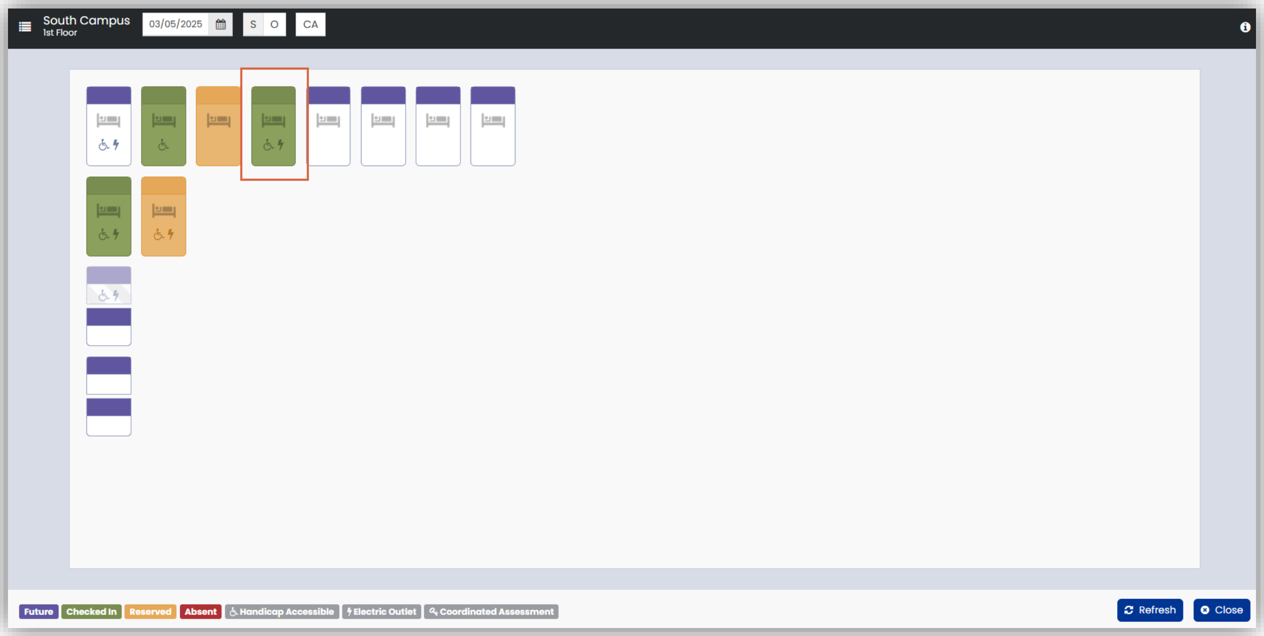
Click the lookup icon to search for a Client.



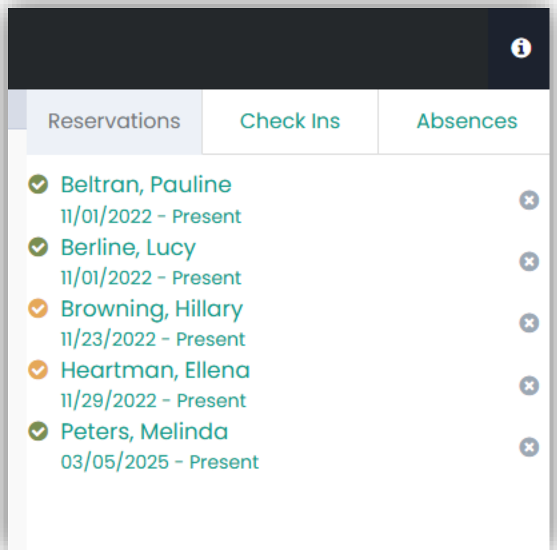
Enter the reservation dates, select to check the Client in, and attach a lease agreement if necessary.

SAVE the new reservation.

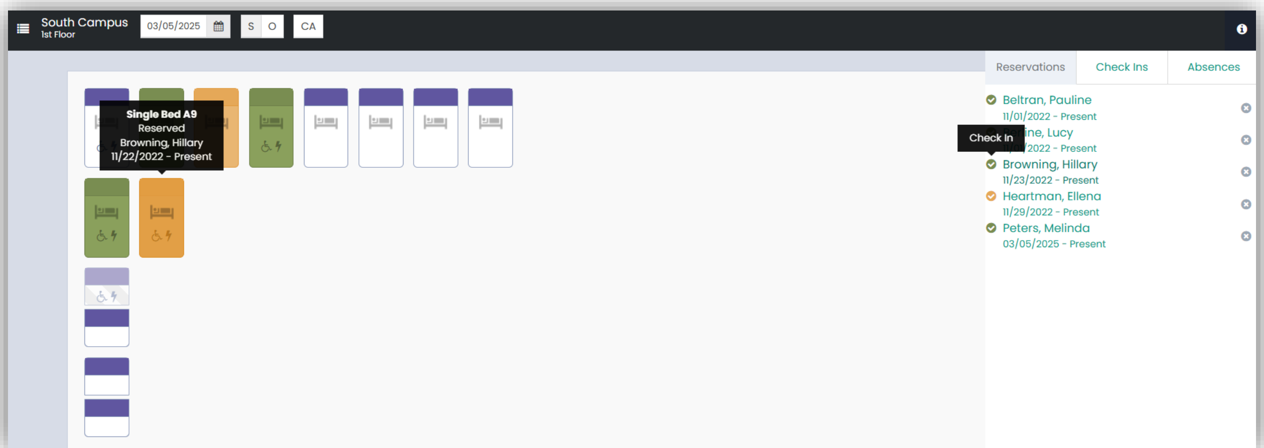
The slot turns green to indicate a Client is reserved and checked in.



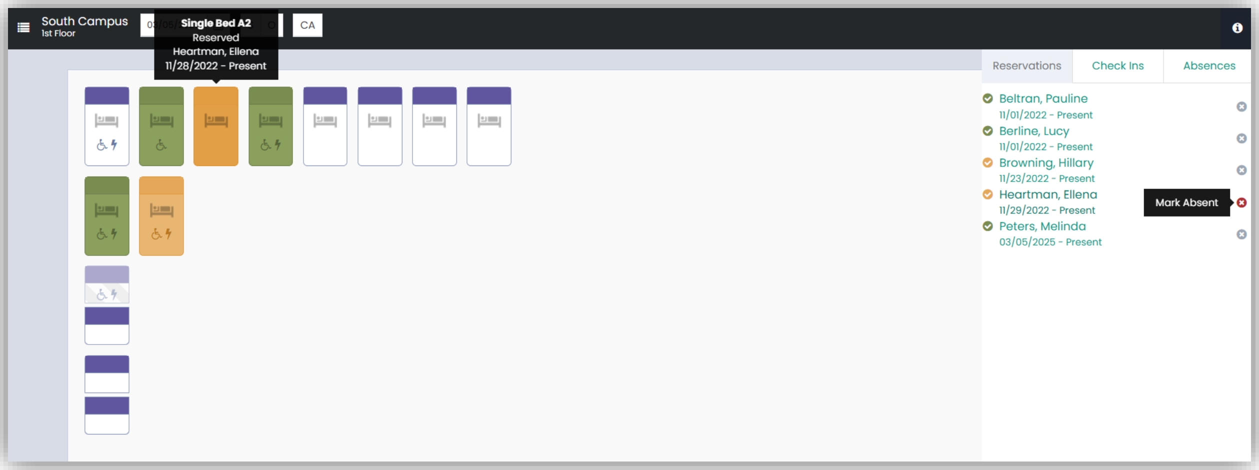
Use the information icon in the top right corner to open an additional window. There are three tabs that provide details about Clients and their reservation status.



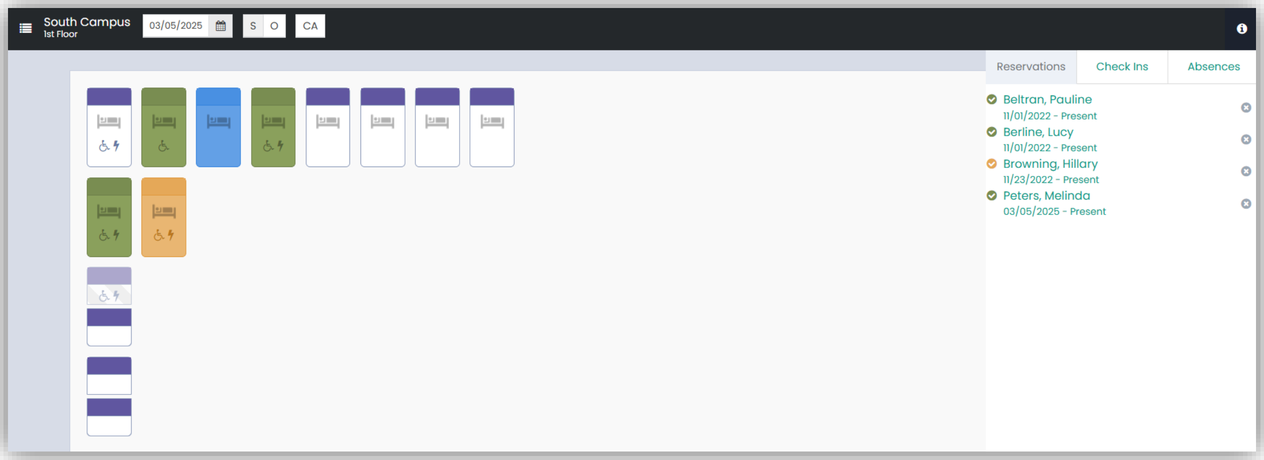
Clients with a reservation are listed on the Reservations tab. Select the checkmark to the left of the Client name to quickly check them into the Usage.



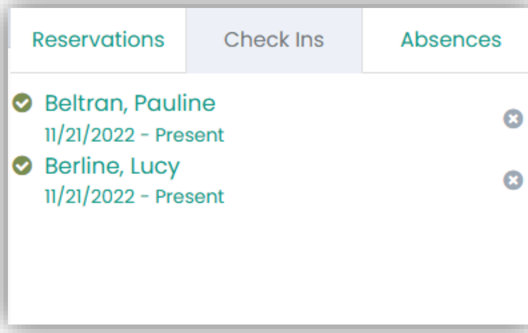
Or select the “X” to the right of the Client name to mark the Client as absent.



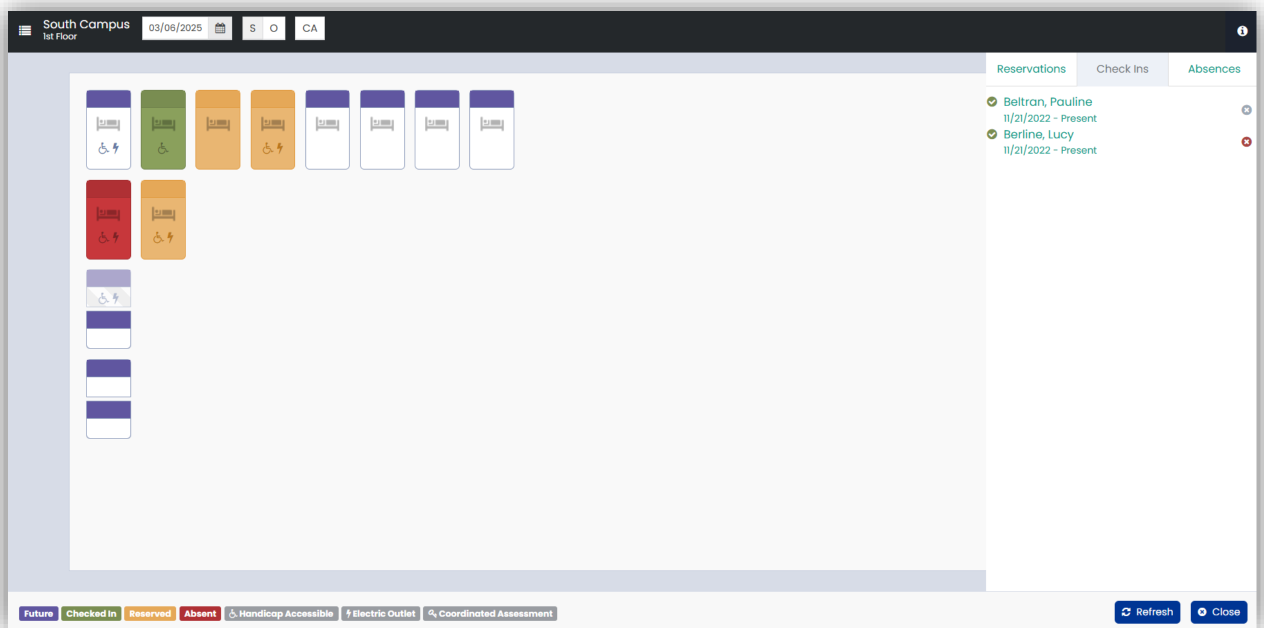
While the Client was marked absent for today, their slot is still held and reserved for the rest of their reservation. That is why it displays highlighted in blue, which represents a future reservation.



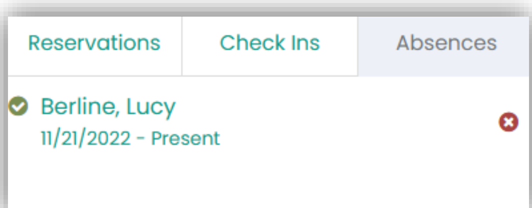
The next tab is Check Ins which displays Client who have checked in for the selected date.



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



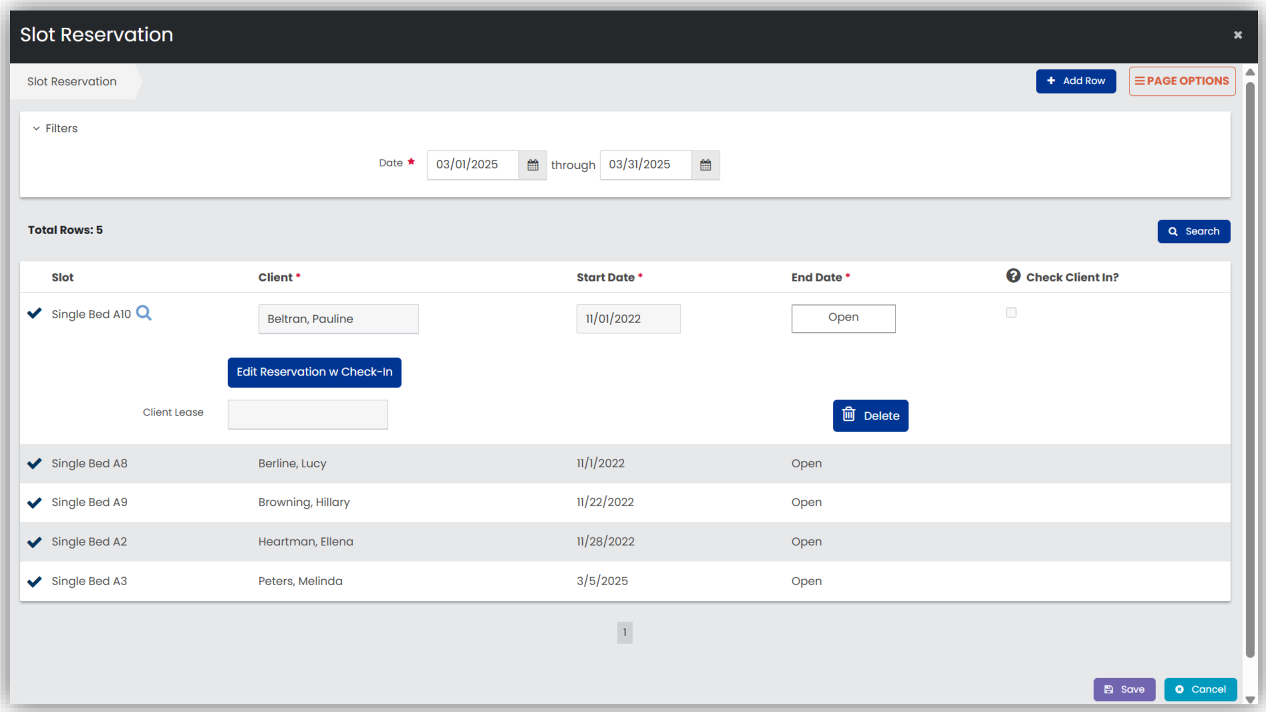
The Slot Check In Manager automatically updates based on your selections. The slots are highlighted with colors from the legend; green for reserved, red for absent, etc.

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.



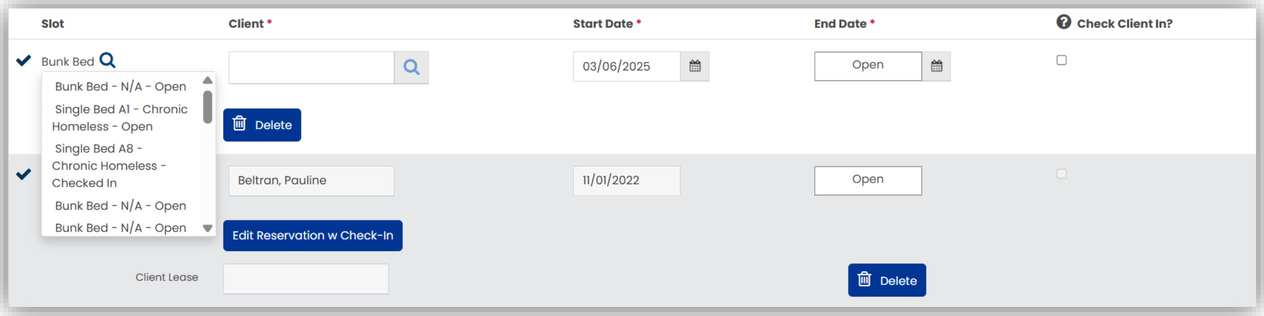
At the top of the form, the dates default to the current month. To view current reservations for the Usage, select the appropriate date range and click SEARCH.

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.

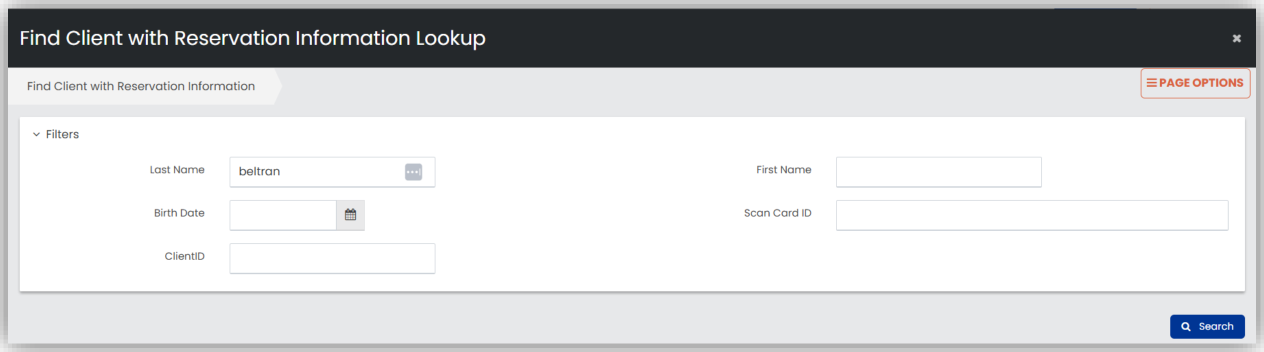
Select ADD ROW to create a new reservation.

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

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

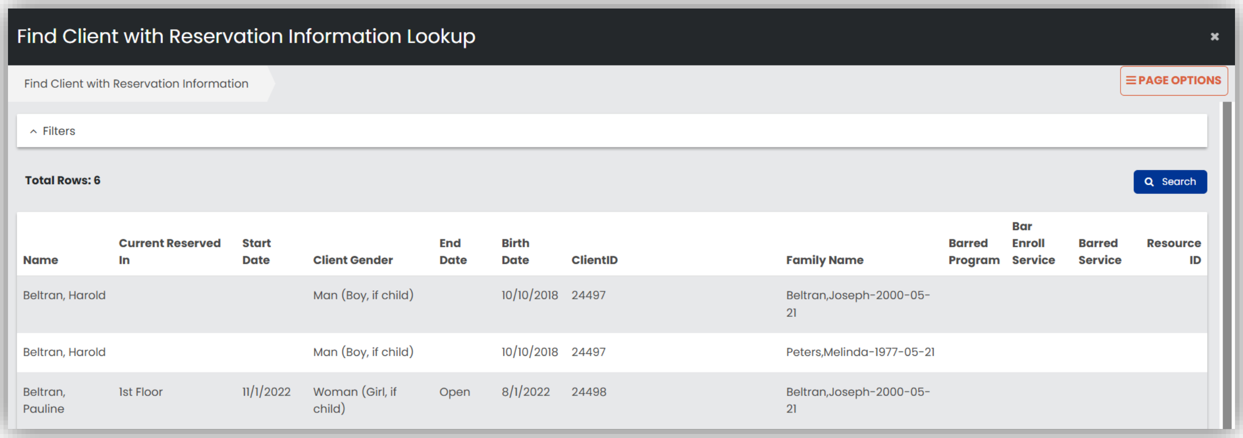


Then, click the lookup icon to search for the Client. You can search by last name, first name, birthdate, scan card ID, or Client ID.



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

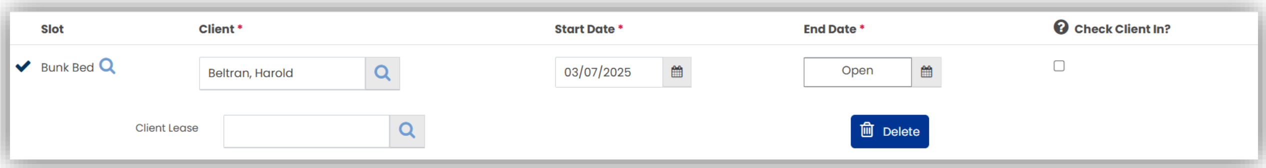
The list includes the Client name, if the Client already has a reservation, and if so, where, and when.



The 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 **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.

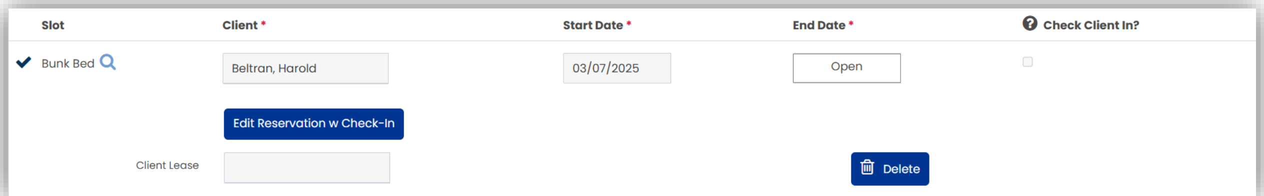
When entering reservations, the system will validate if the Client is allowed access to the Usage based on the Client's record and on the Usage's configuration. If they are not allowed, a message will display explaining the reasoning that prevents the reservations from being completed.

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.

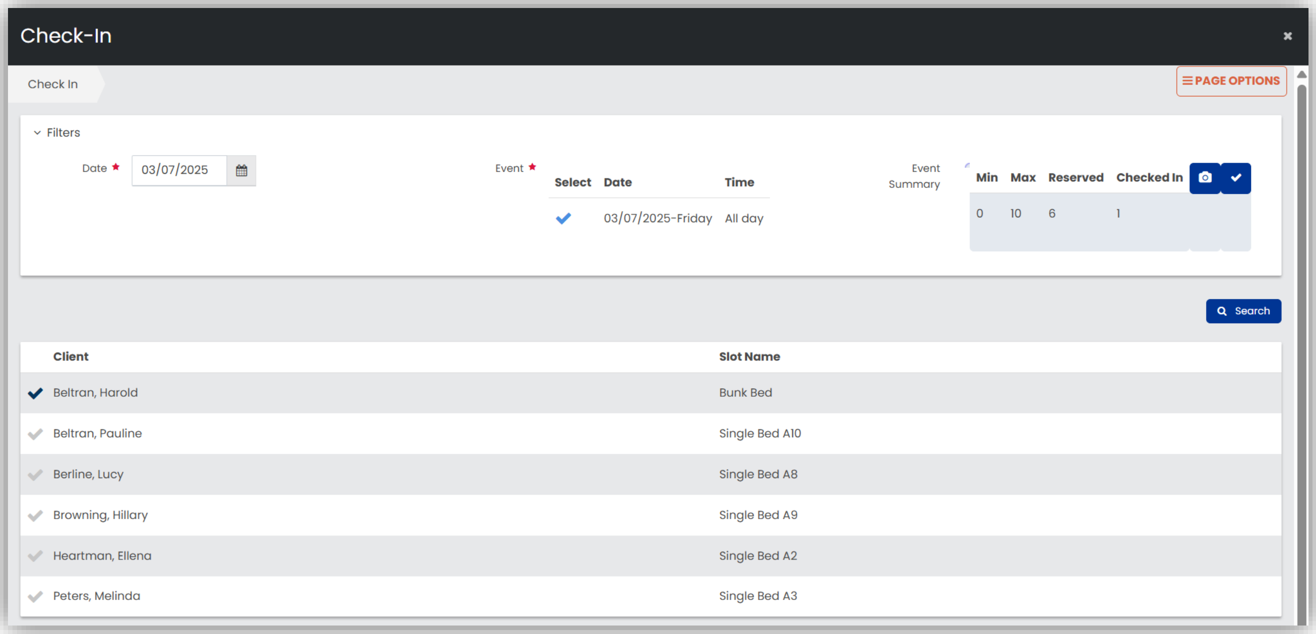
Check-in

Back on the Resource menu, select Check-in.

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

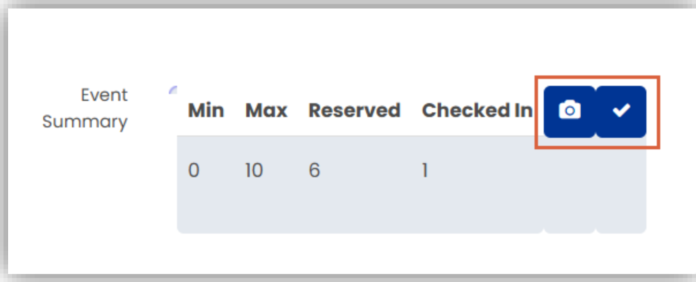
The **Date** defaults to today's date but can be changed. Select SEARCH to display the list of reservations for the selected date.

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**. Records that display a checkmark to the left of the Client’s name are already checked in to the reservation.

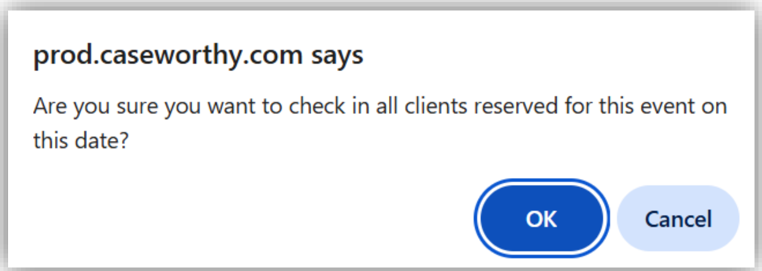
There are a couple of options for checking in any remaining reservations on this form.



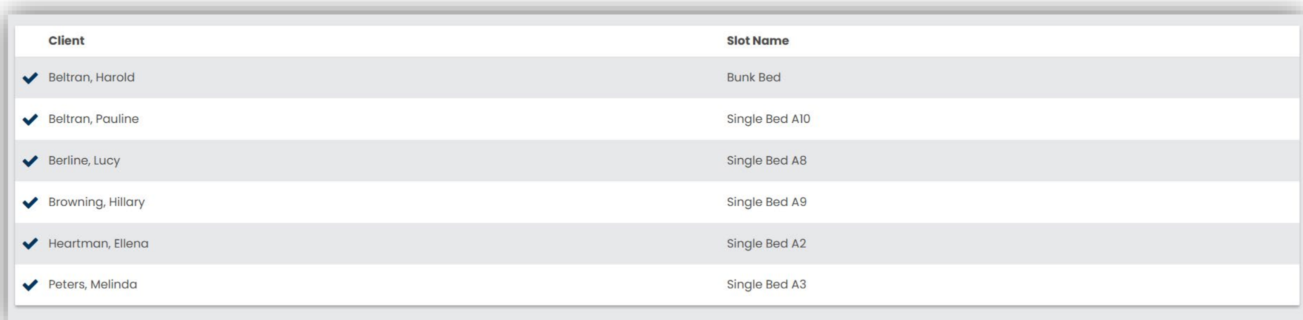
In the top right corner, the camera icon can be used to check Client’s in using scan cards. This will only work for single-service Usages.

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.

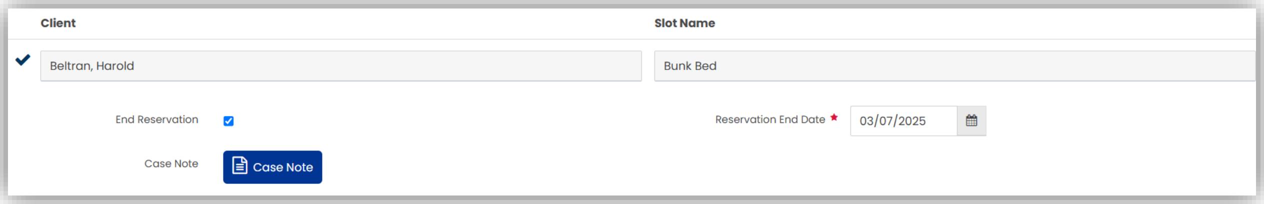


Select OK. All Clients are then checked in, which is represented with a checkmark to the left of each Client’s name.



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.

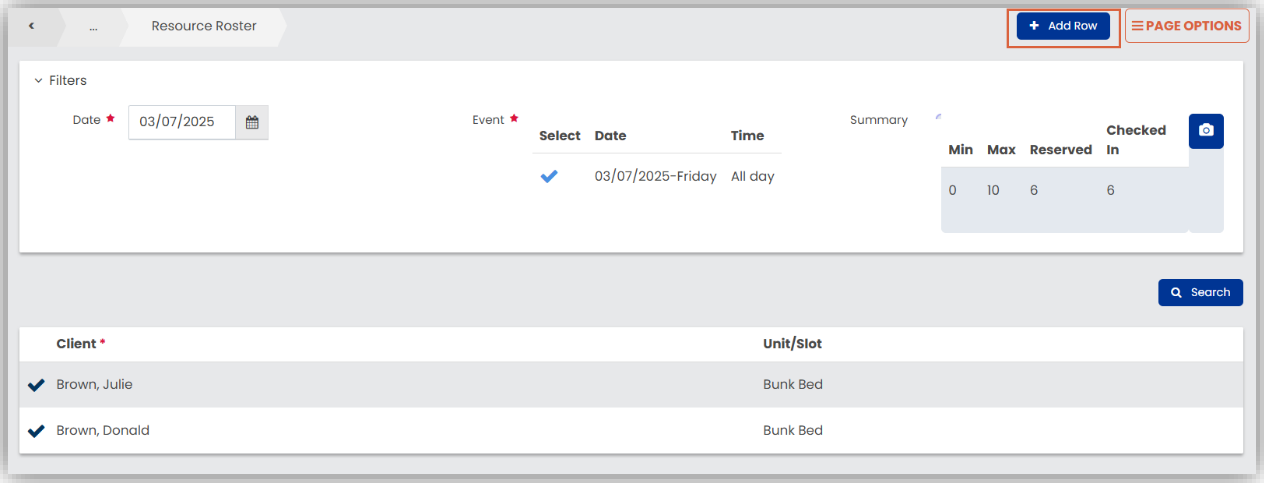
A CASE NOTE can be added to the reservation too.

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.

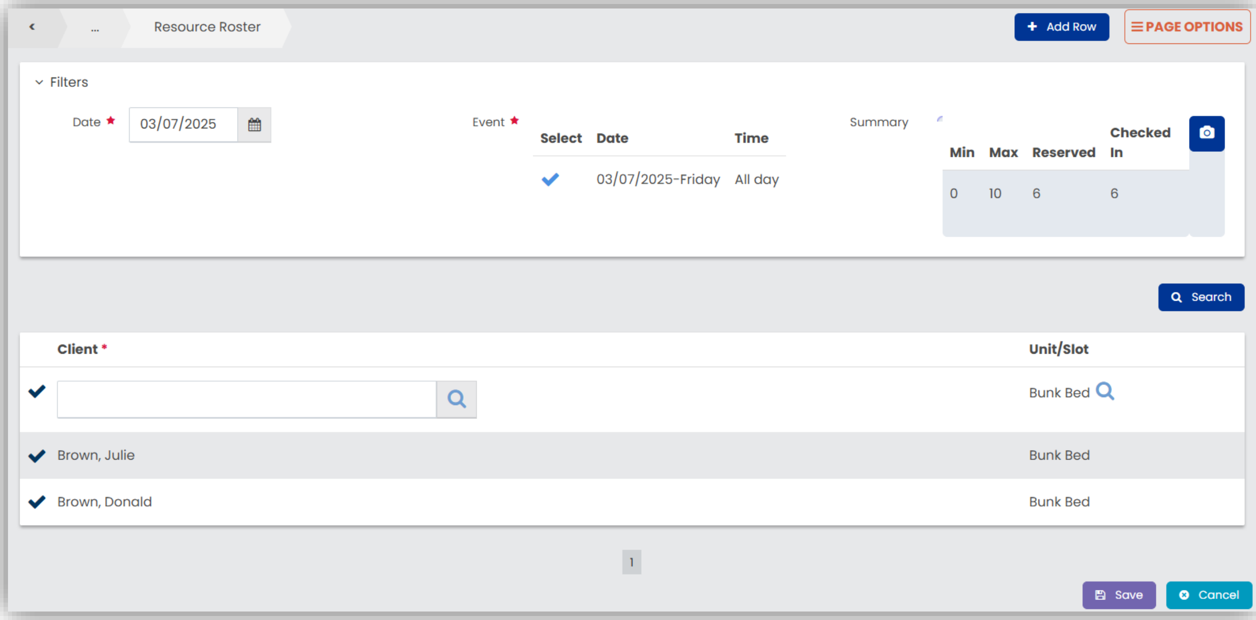
- This form displays Clients with reservations that have not yet checked in.
- You can add new reservations on this form.
- You can check-in Clients with scan card functionality only.
- You can edit each reservation listed, including the Client's name and the slot.



Choose the appropriate date and select SEARCH.

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

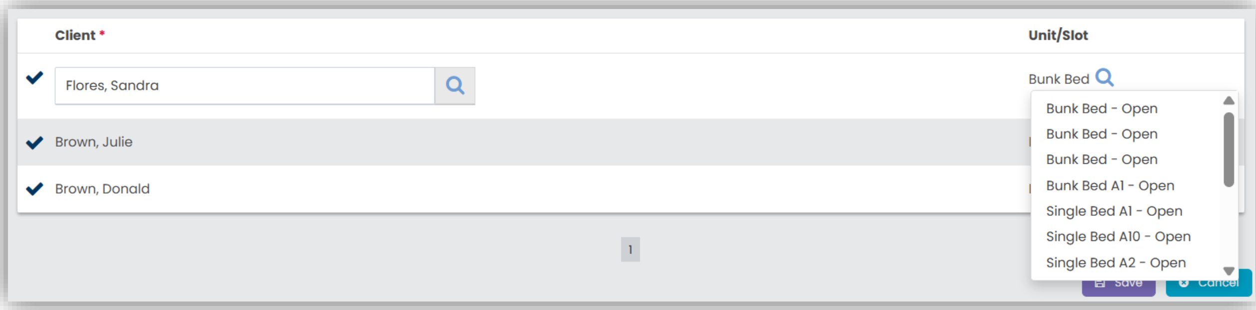
Use ADD ROW to record a new reservation.



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.



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

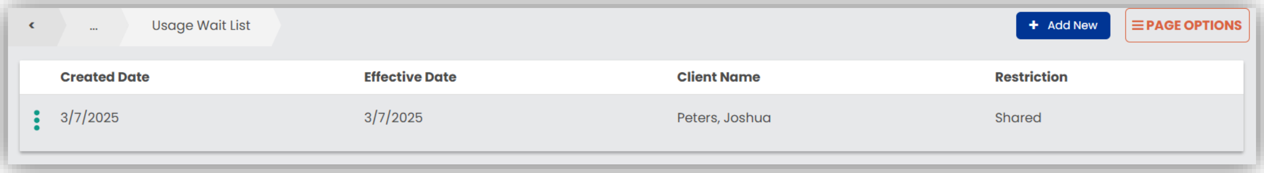
Once a Client is checked in to the reservation, they will no longer display on this form.

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.

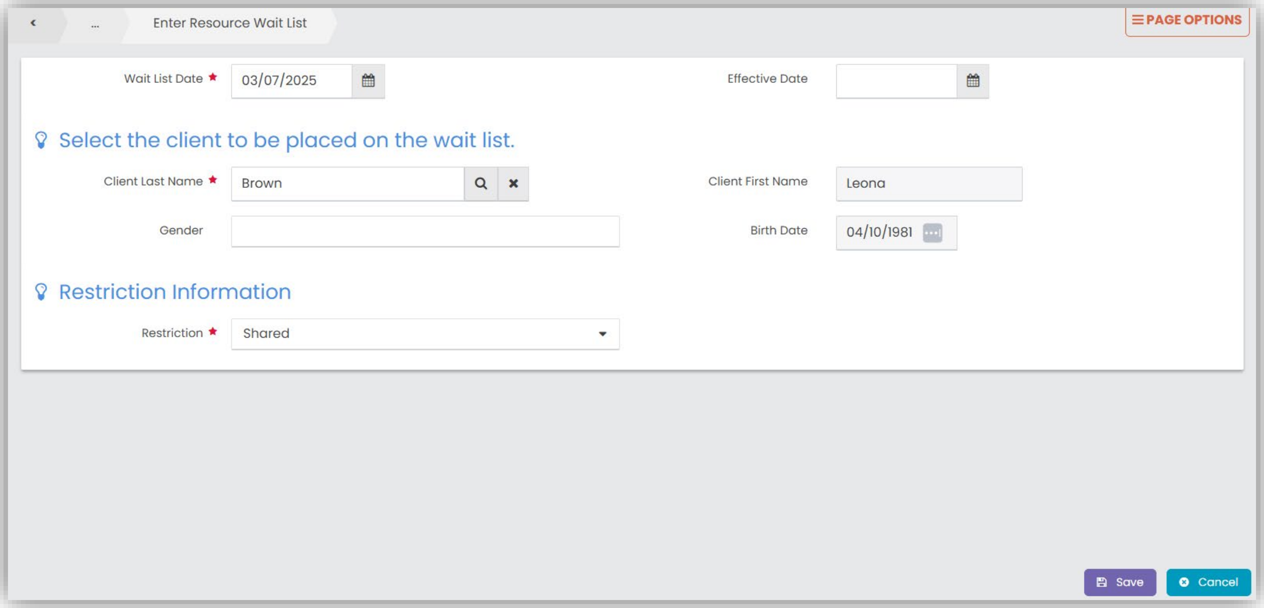


For example, if all beds are reserved for the month of December and you would like to maintain a record of Clients that would like to take over the reservation if one becomes available. This is used for reference purposes only and does not work with other functionality.

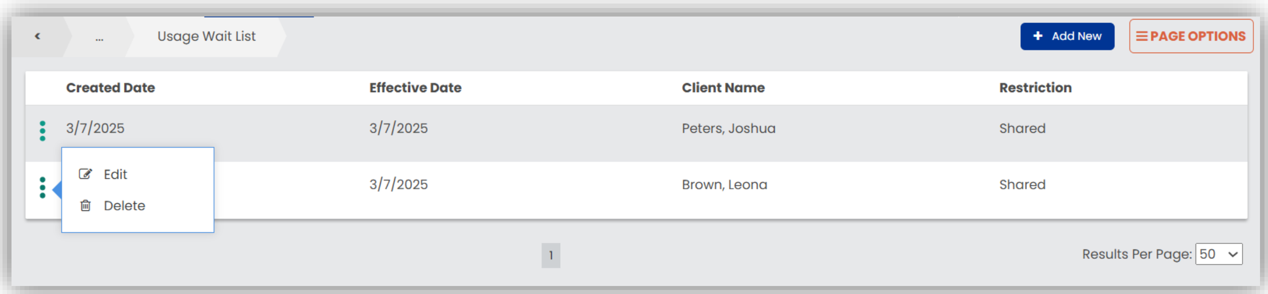
Use ADD NEW to include a Client on the waitlist.

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

Select SAVE when done.

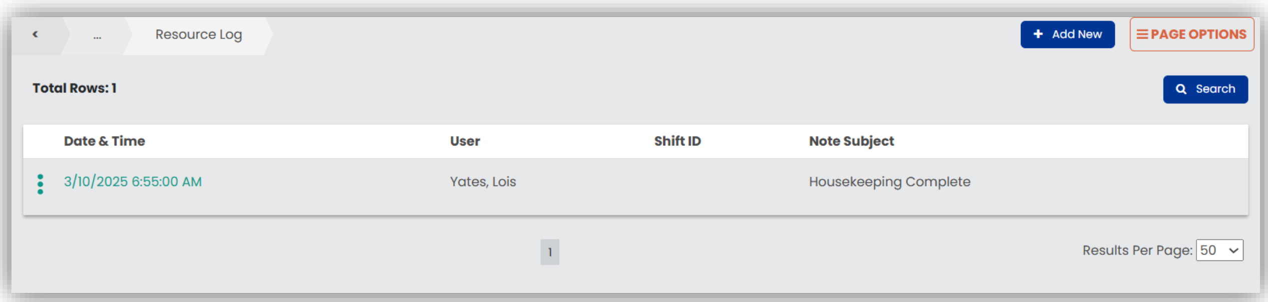


From the record's menu, select Edit to update the details of the request, or use Delete to remove the Client from the waiting list.



Resource Log

The next option on the Usage menu is Resource Log.

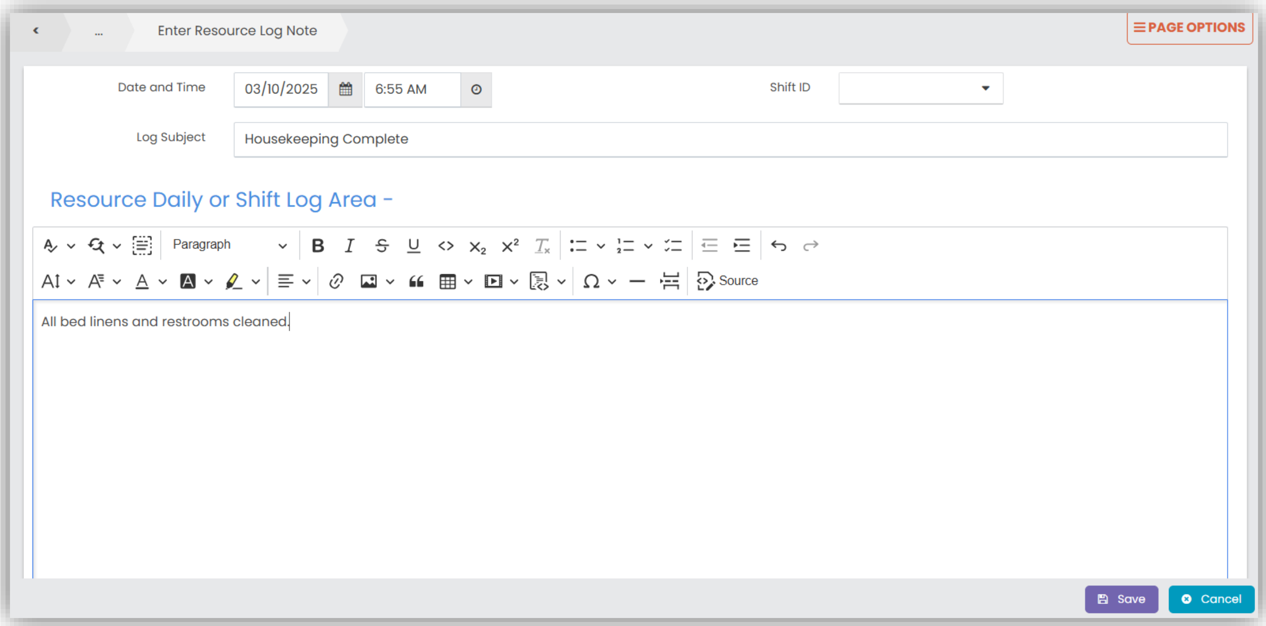


A list of existing notes is displayed.

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

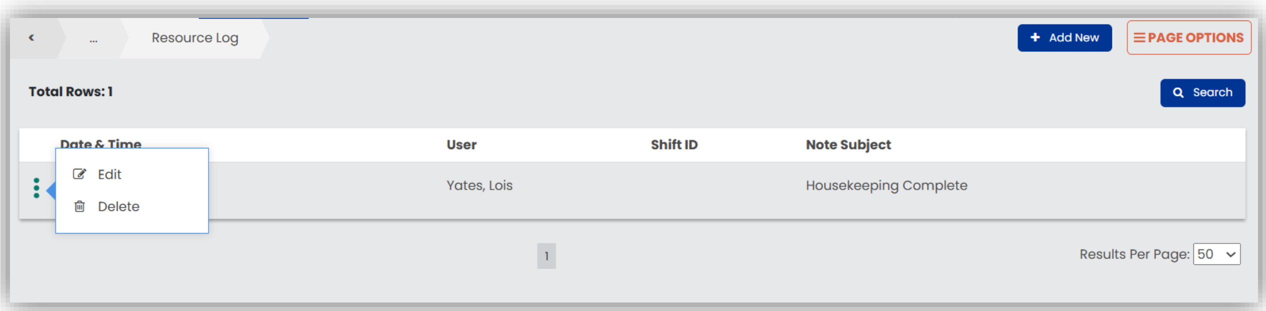
For example, this could be a place to maintain records of housekeeping or events that may have occurred.

Select ADD NEW to record a note.



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

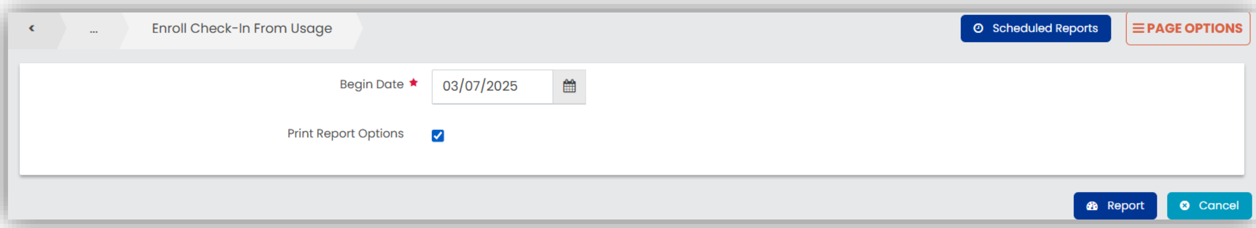
Off the note's menu, you have the option to Edit or Delete the record.



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.

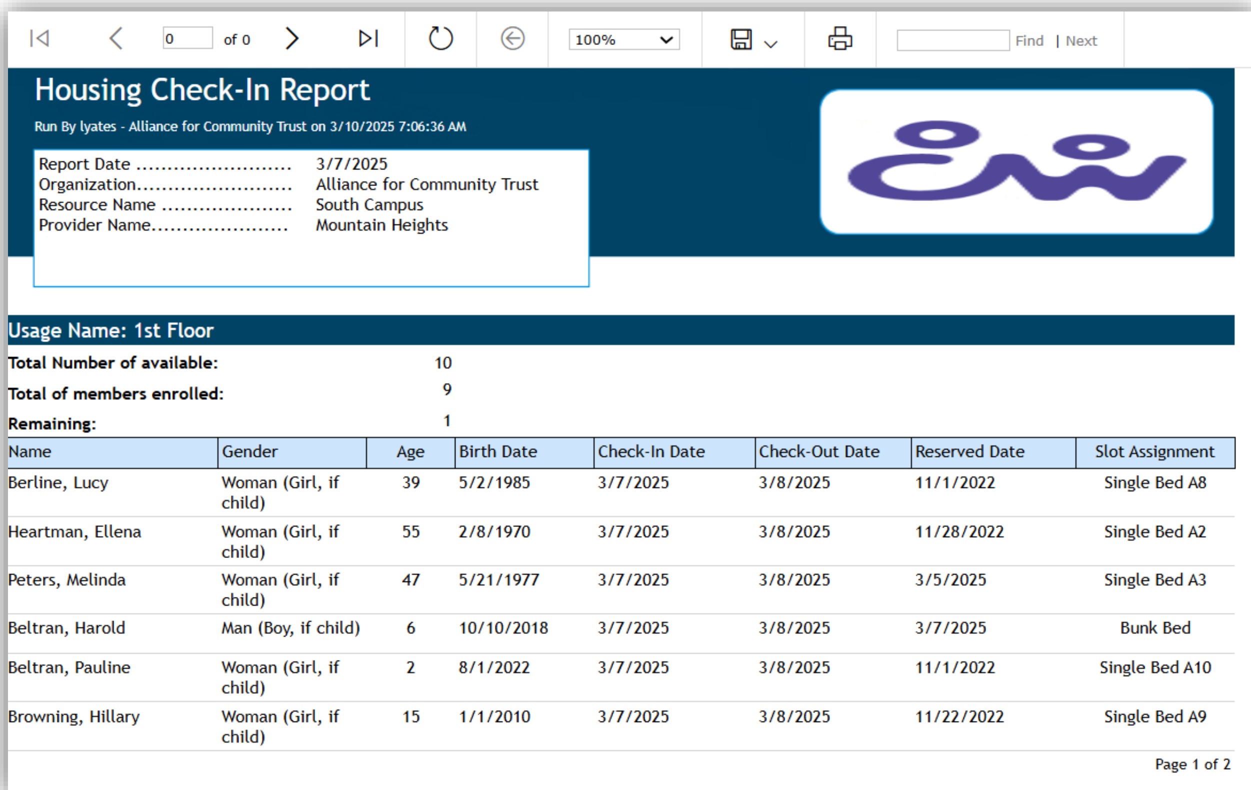
All the reports can be scheduled to automatically generate and to email to selected Users recurring on a set date and time.



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.


Housing Check-In Report

Run By lyates - Alliance for Community Trust on 3/10/2025 7:06:36 AM

Report Date	3/7/2025
Organization	Alliance for Community Trust
Resource Name	South Campus
Provider Name	Mountain Heights

Usage Name: 1st Floor

Total Number of available:	10
Total of members enrolled:	9
Remaining:	1

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

Page 1 of 2

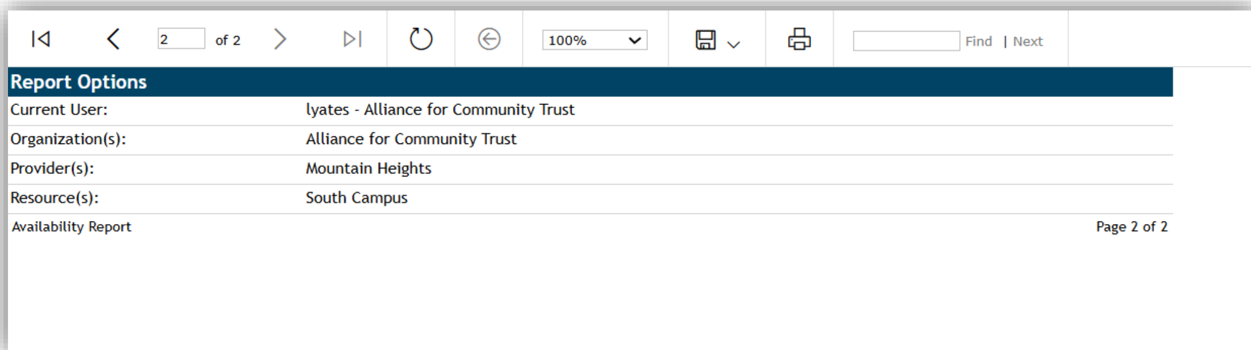
At the top of the report, the details about how the report was generated are displayed.

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.

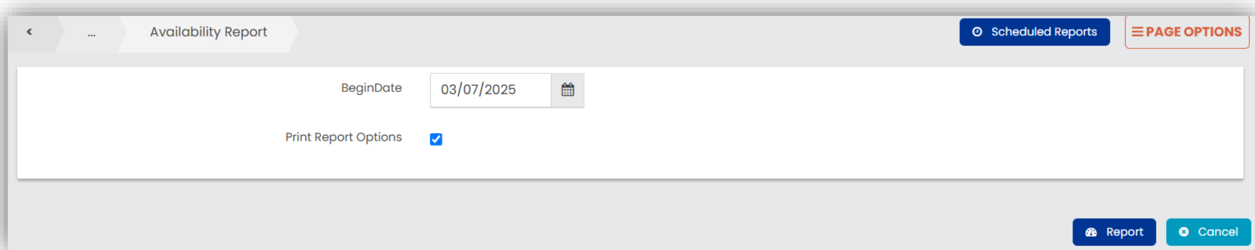
The second page displays the report options, including the current User, as well as the selected Organization, Provider, Resource, and Usage.



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

Availability Report

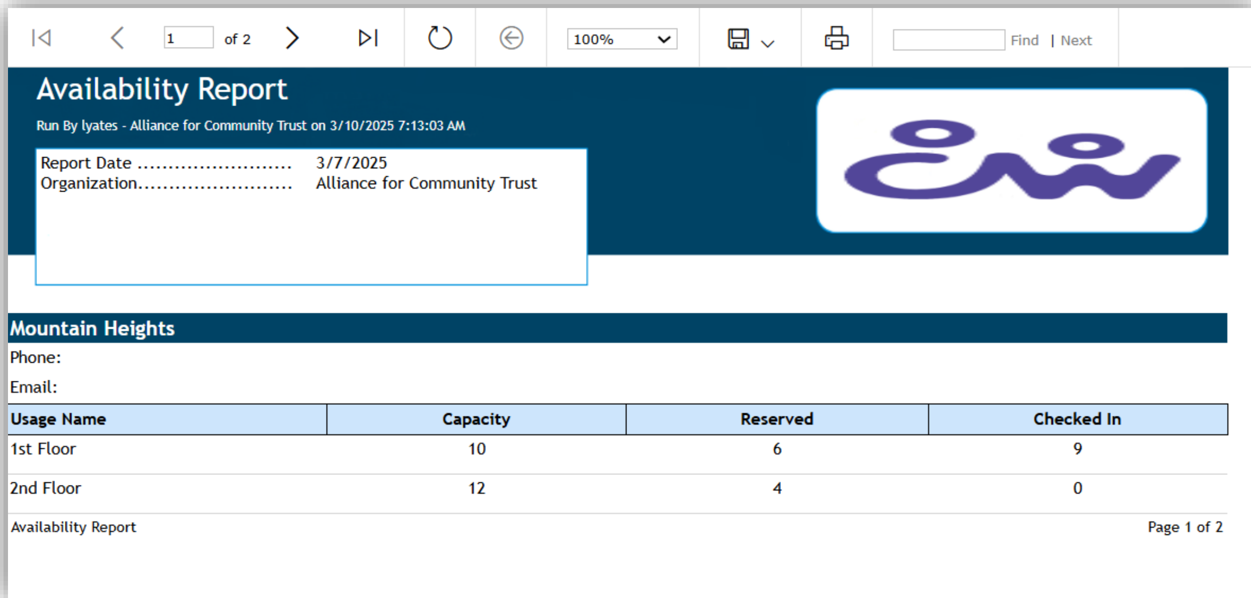
The next option on the Usage menu is Availability Report, which is another report. This option displays the Emergency Housing availability for ALL the Resource's Usages for a selected date.



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.

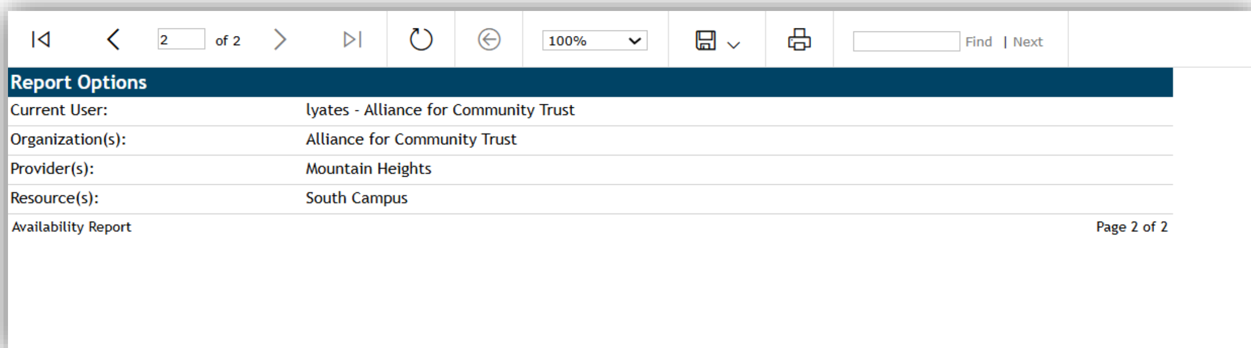
Then, run the report.



The 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.

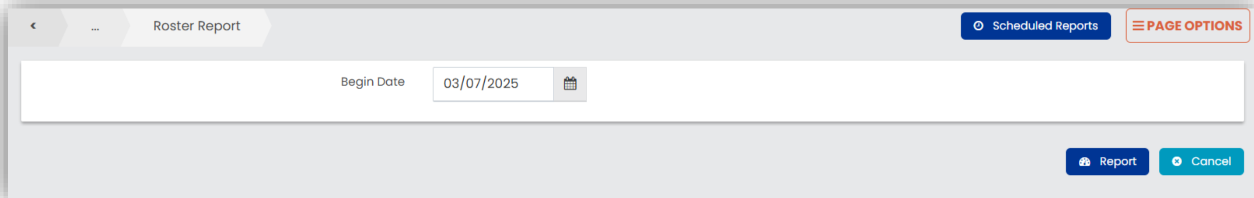
The second page displays the report options, including the current User, as well as the selected Organization, Provider, Resource, and Usage.



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

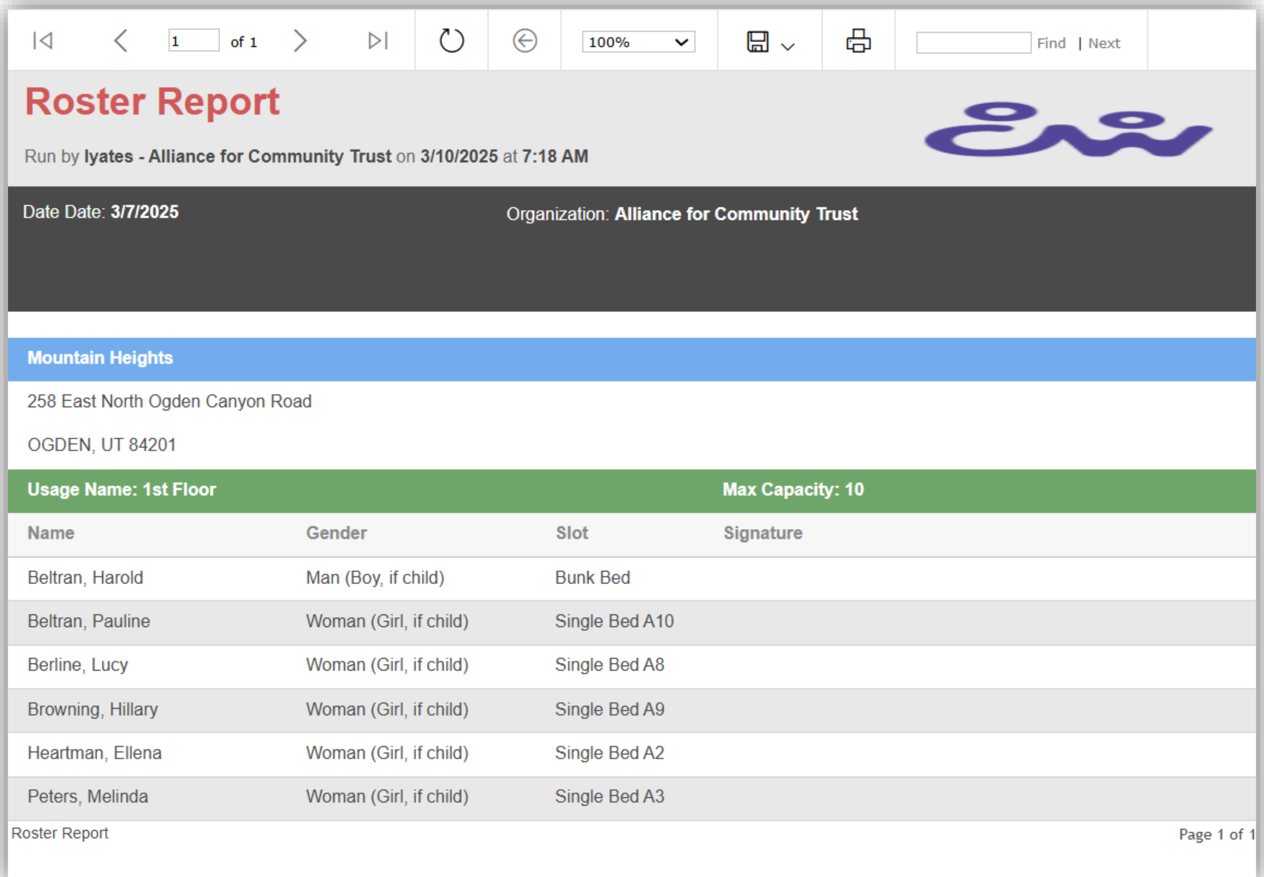
Check-In Roster Report

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.


1 of 1
100%
Find | Next

Roster Report

Run by lyates - Alliance for Community Trust on 3/10/2025 at 7:18 AM

Date Date: 3/7/2025

Organization: Alliance for Community Trust

Mountain Heights

258 East North Ogden Canyon Road

OGDEN, UT 84201

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	

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.

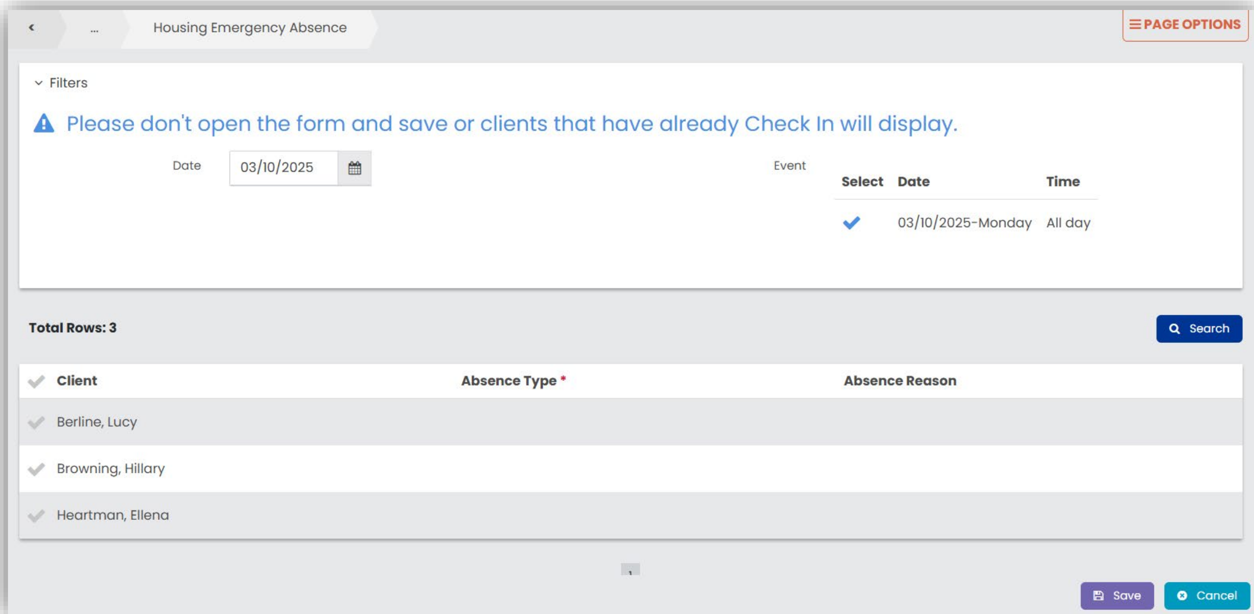
Details about the Usage are highlighted in green.

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.

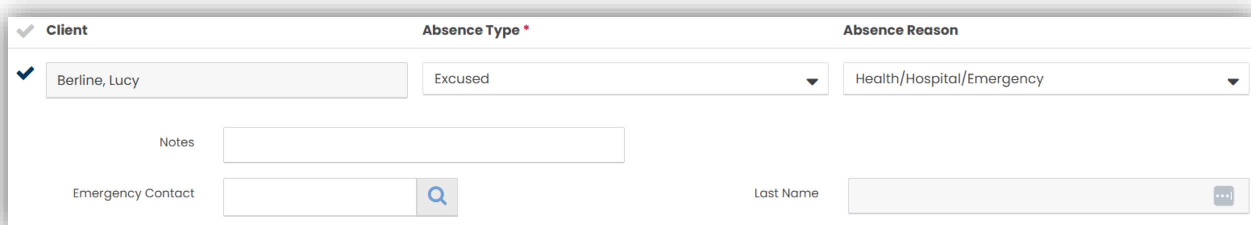
Housing Emergency Absence

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



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.



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.

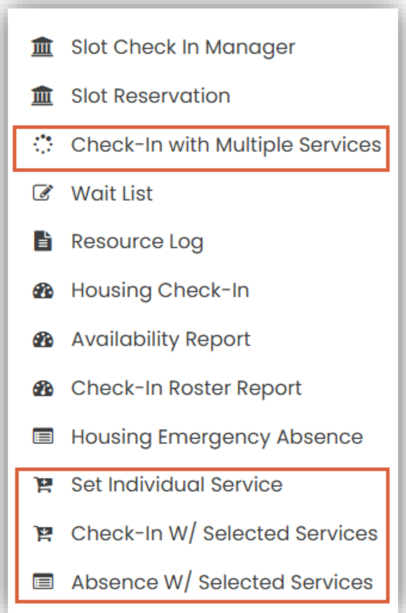
Enter additional notes and select an emergency contact, if needed, then SAVE your changes.

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

Multi-Service Usage

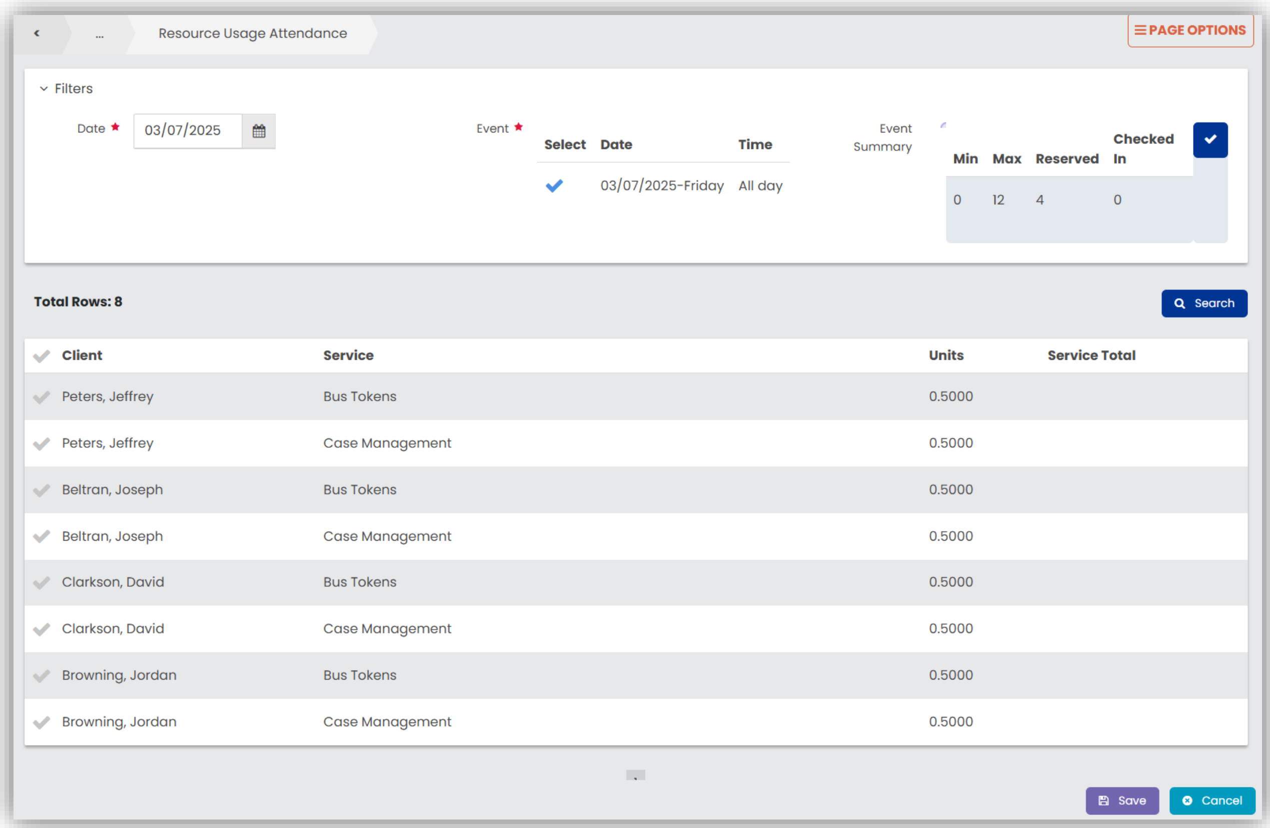
If a Usage is set to post to multiple services, the menu options appear a little different.

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.

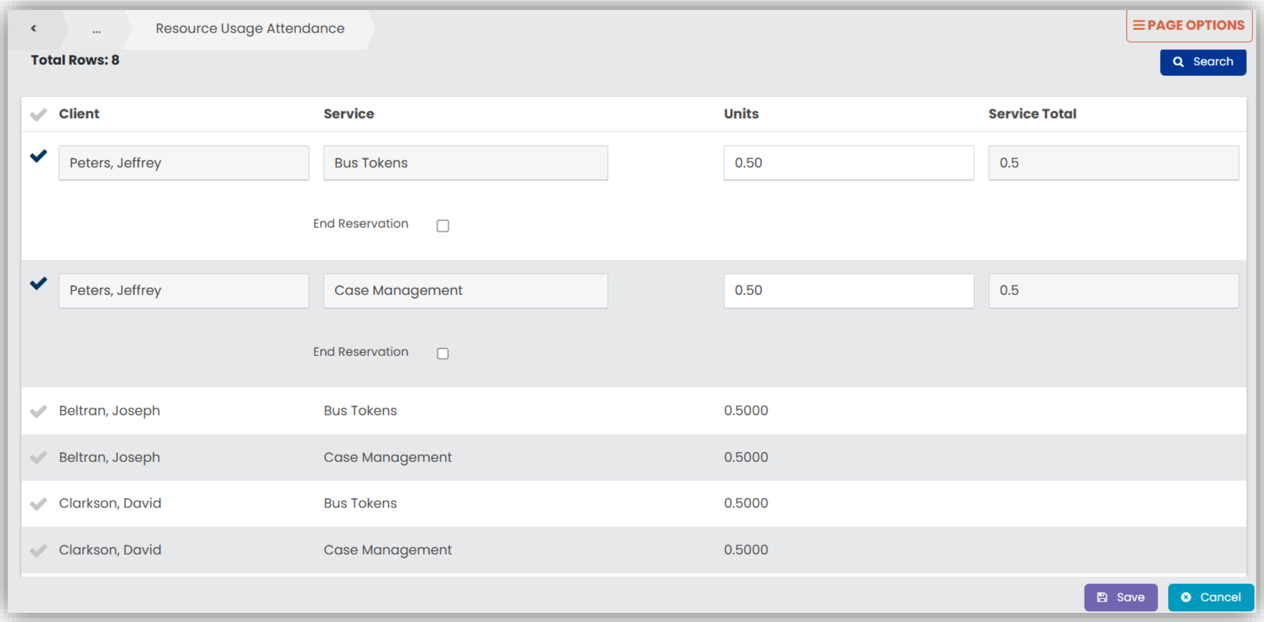


This form works the same as *Check In* which requires you to select a date to search for reservations, and you can click the checkmark in the top right corner to check all Clients in at one time.

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.

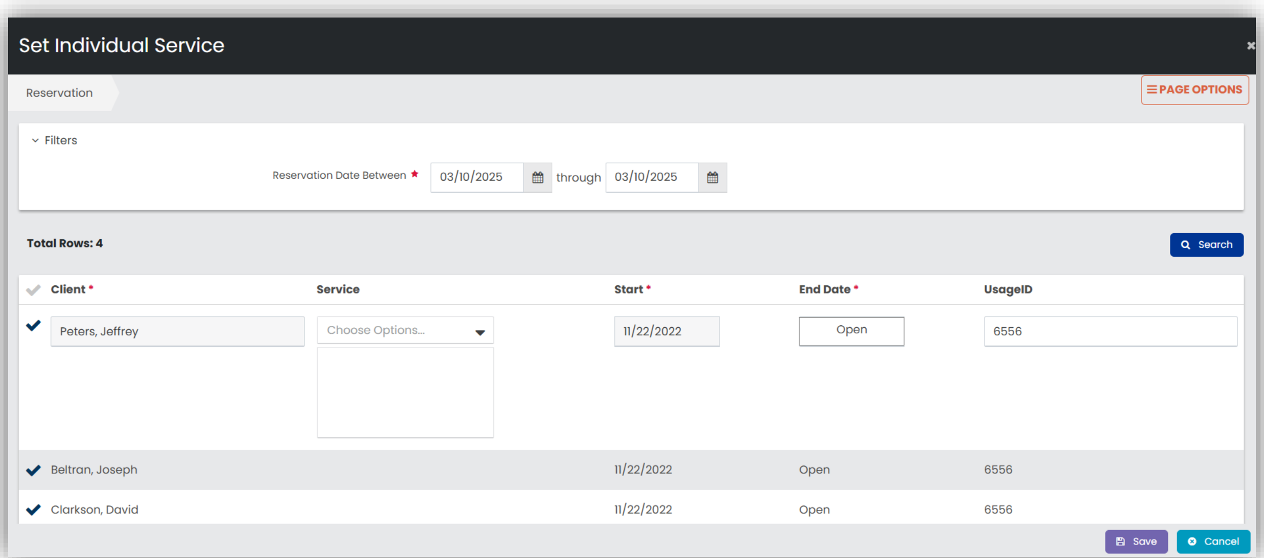
Select the services they received and update the units, if necessary.



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

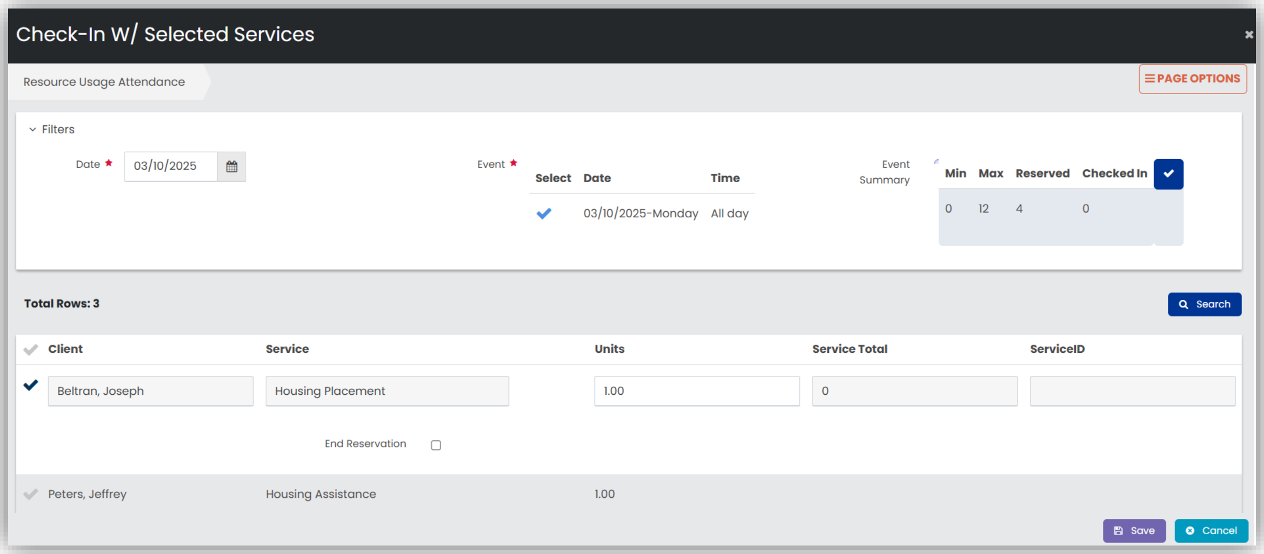
Each Client with a reservation for the selected date range displays, including their name and reservation period.

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.

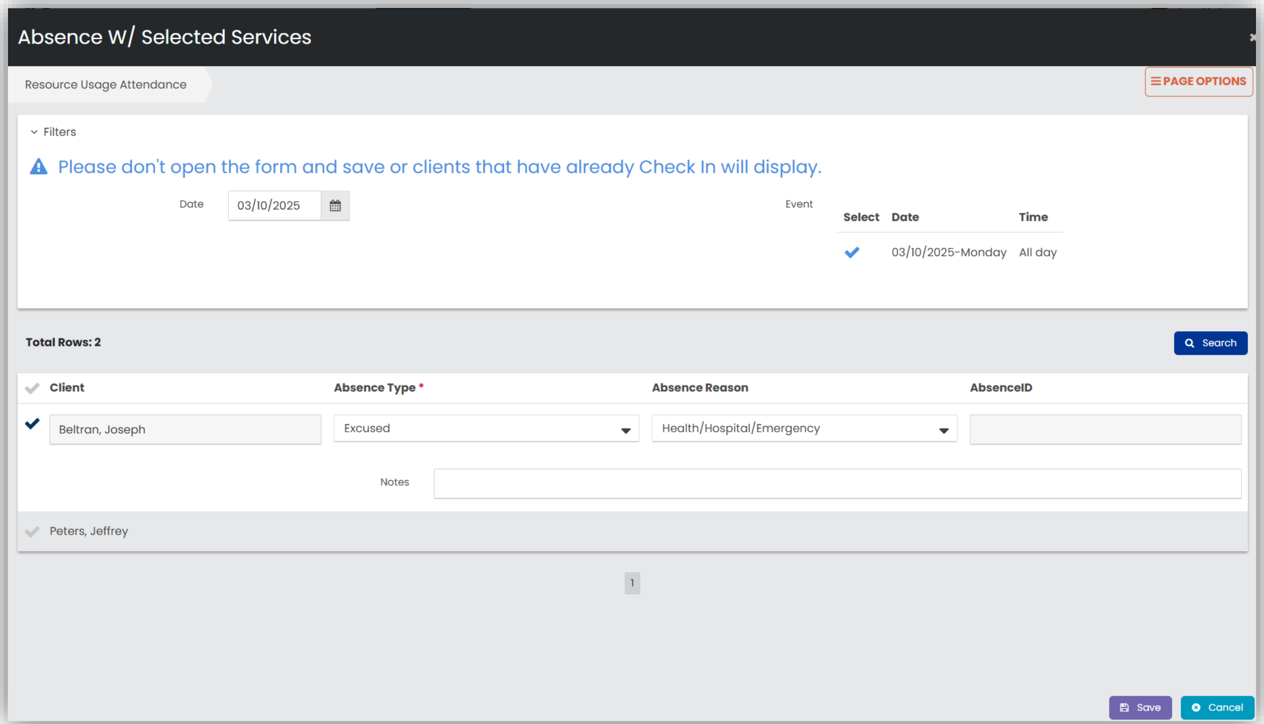


This form is like the *Check In with Multiple Services* form and provides you with the opportunity to easily check-in all Clients at one time by selecting the checkmark in the top right corner.

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.



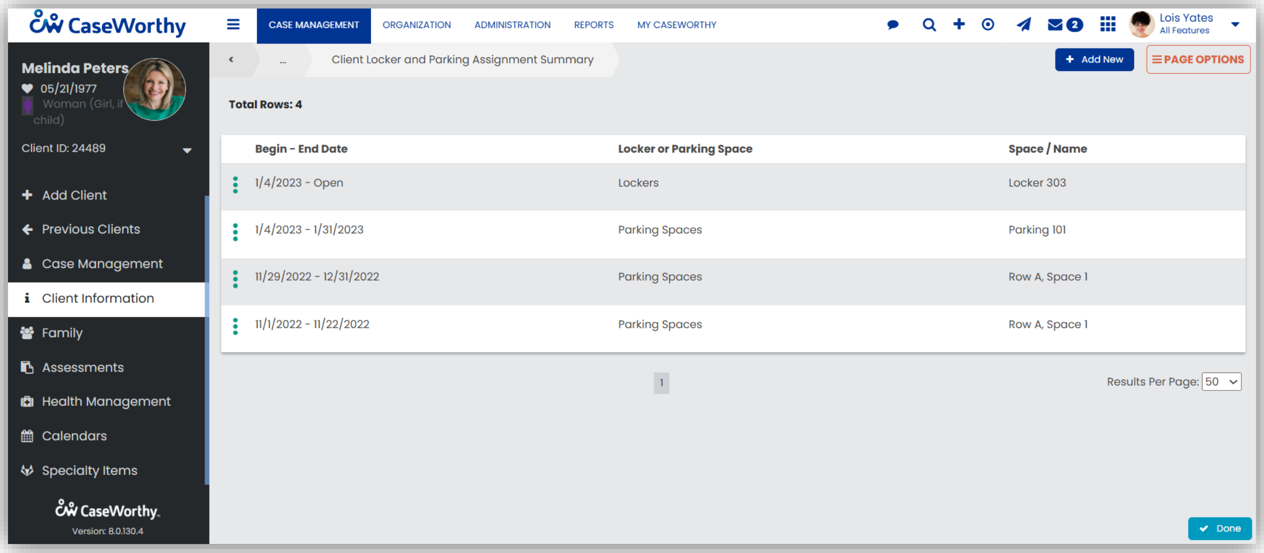
Select the Client who is absent. Then, select the **Absence Type** and the **Absence Reason**.

Enter additional notes as needed and then SAVE the form.

Assigning Lockers and Parking Spots

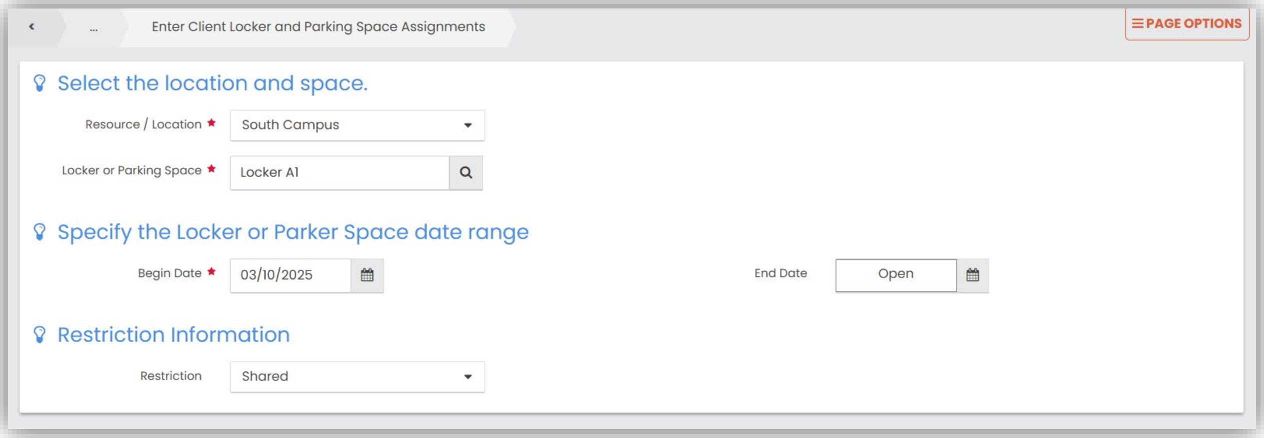
During Resource setup, lockers and parking spaces were added. Every Provider Resource can include these amenities, which are then assigned to Client's individually on the Case Management tab.

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



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

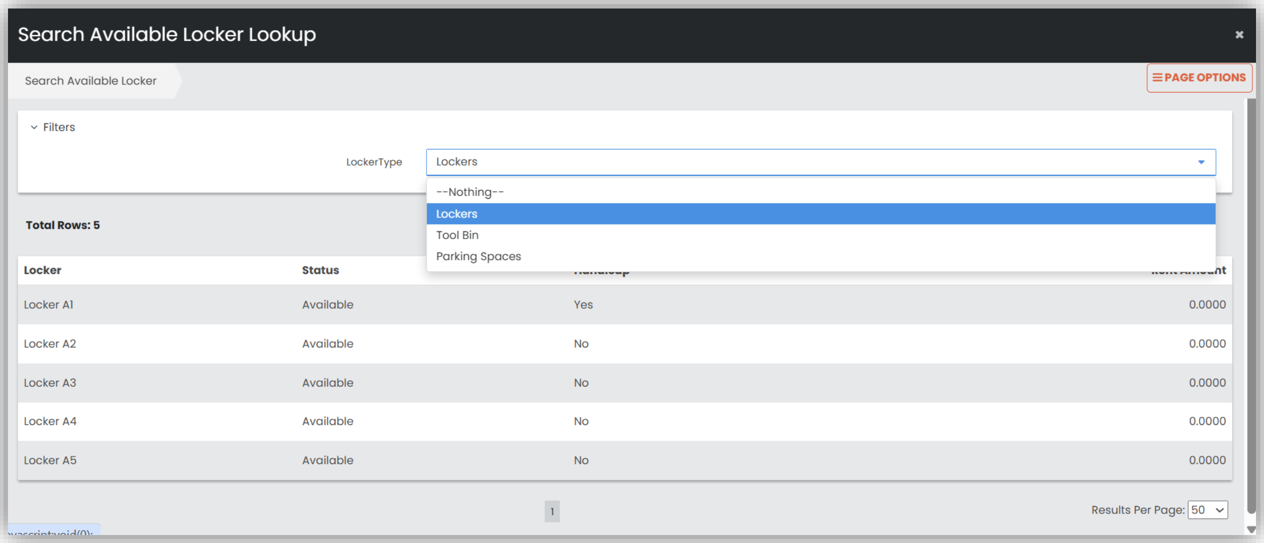
Select ADD NEW to add a new locker or parking space assignment.



Start by selecting the **Resource**.

All the Provider's Resources are listed.

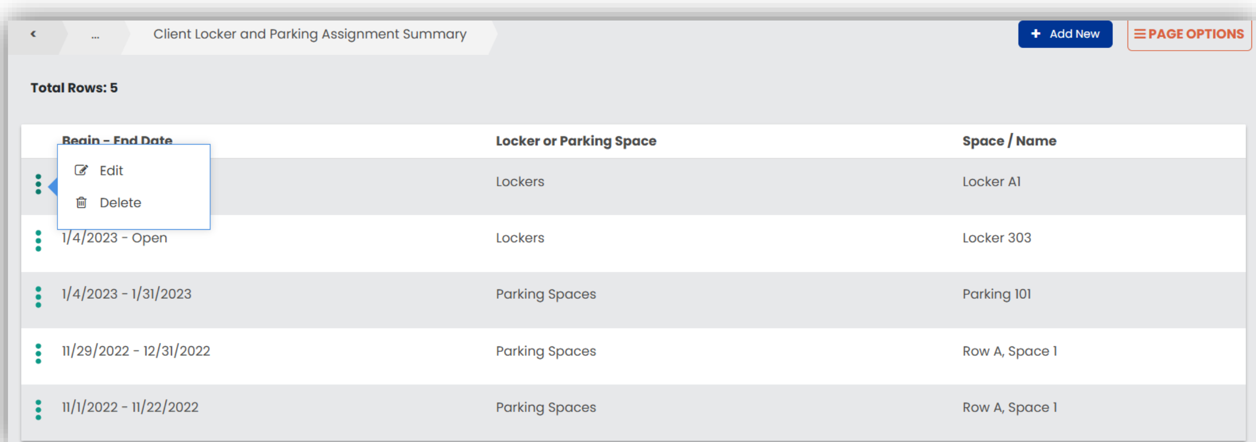
Click the lookup icon to select from a list of available lockers or parking spaces for the selected Resource. The search form defaults to available “Lockers” but can also be changed to view a list of available “Parking Spaces”.



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.



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.

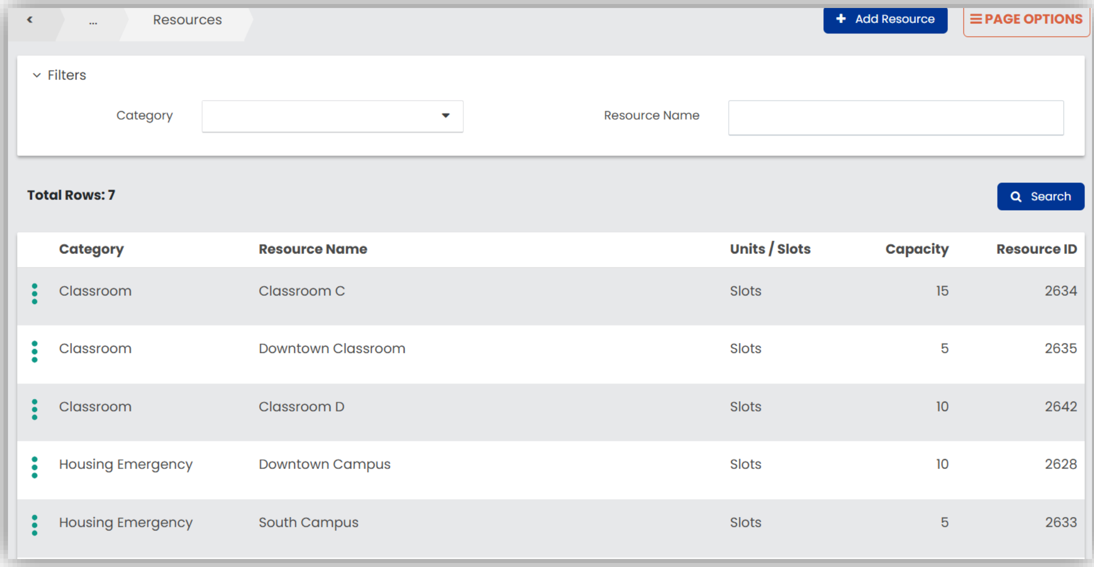
In this example, we will create a Classroom Resource with two locations, which are referred to as Usages. Since these Usages include desks, they will be configured with a Usage Type of "Slots".

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

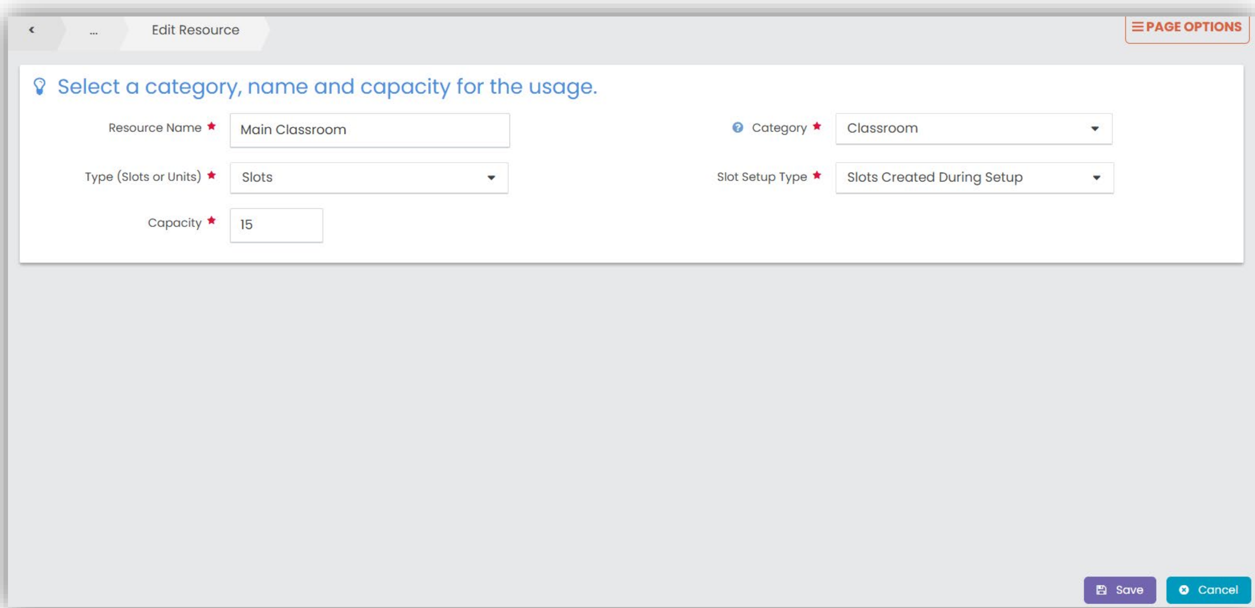


Each Resource includes its assigned **Category**, identifying name, Resource type, which is either “Units” or “Slots”, and its Resource capacity.

Add a Resource

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

Select ADD RESOURCE.



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.

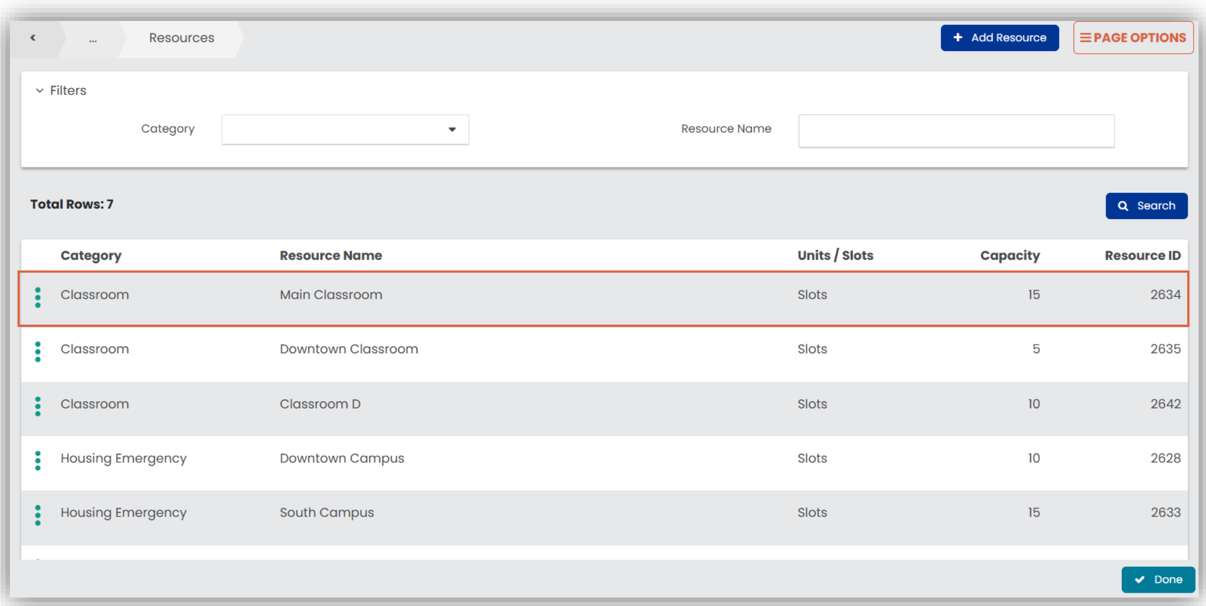
- “Units” are typically used when there is one Resource used by multiple Clients at one time, like an apartment.
- “Slots” are typically one slot per Client. For example, desks in a Classroom. We will select “Slots” in this example.

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.

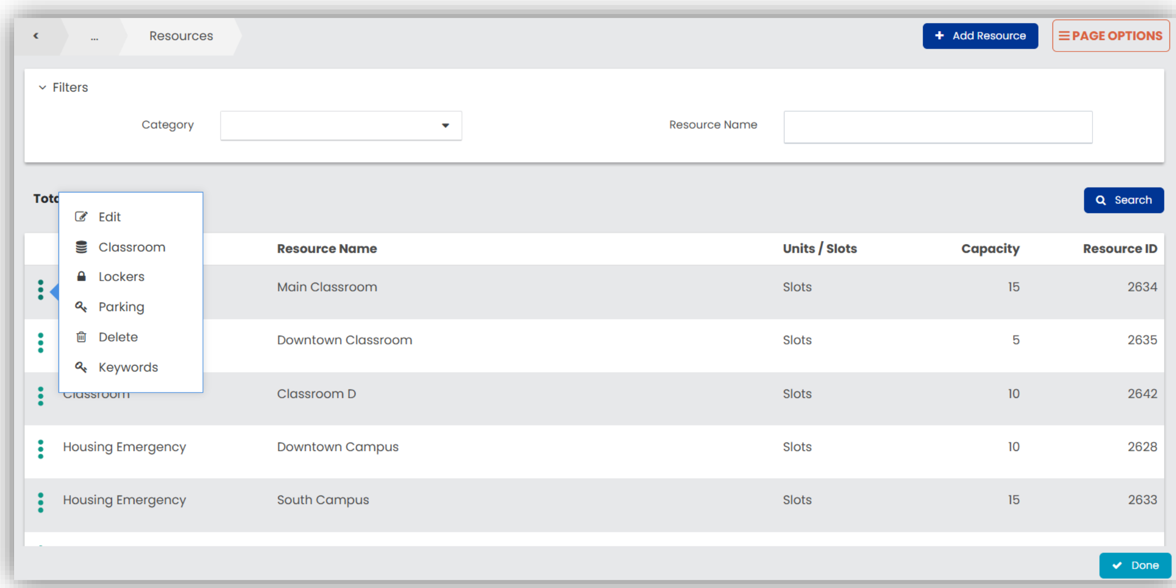
Select SAVE.

The new Resource is now displayed on the summary form.



Resource Menu

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



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.

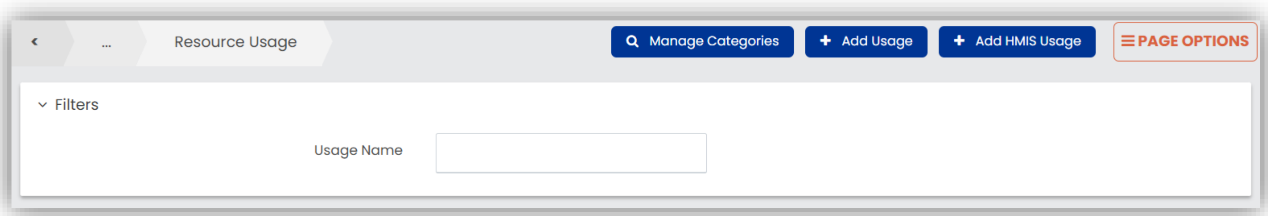
Edit

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.

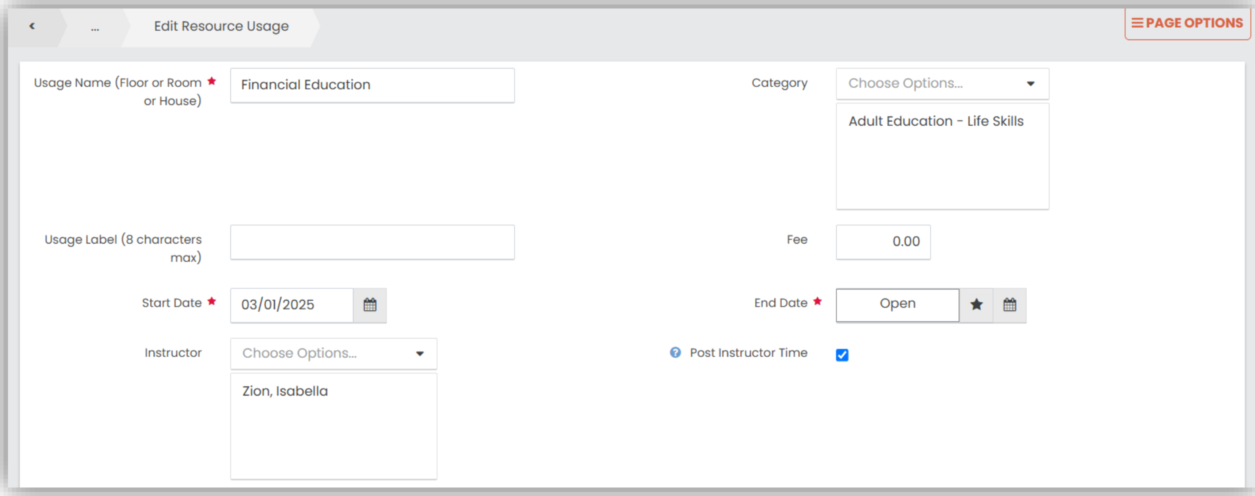


The MANAGE CATEGORIES button at the top allows you to manage the list of available categories that can be assigned to a Usage. A category is not required, but it can be useful for filtering search results.

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 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 or 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.

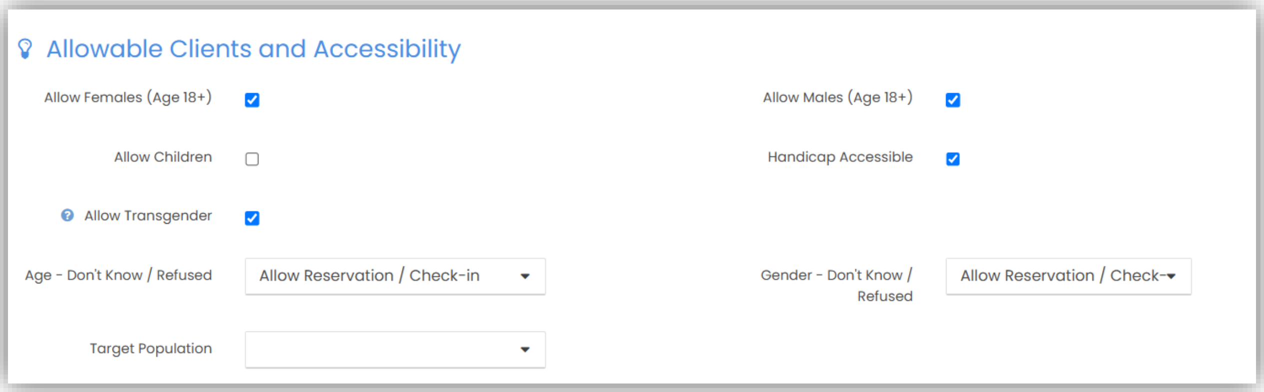
For a User to appear for selection as an “Instructor”, they must have an assigned User category of “Instructor” on the *Organization’s User Add/Edit* form.

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.



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

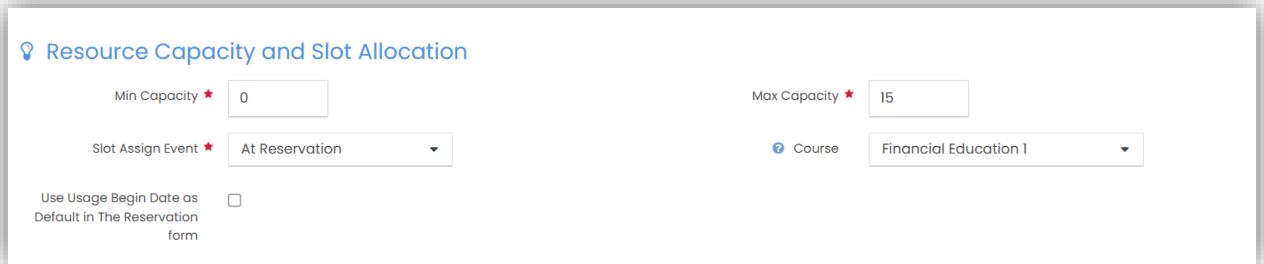
If you select **Allow Children**, an additional field is displayed allowing you to specify the child’s age group. Select “Younger than 18” to allow every child access to this Usage.

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. 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.

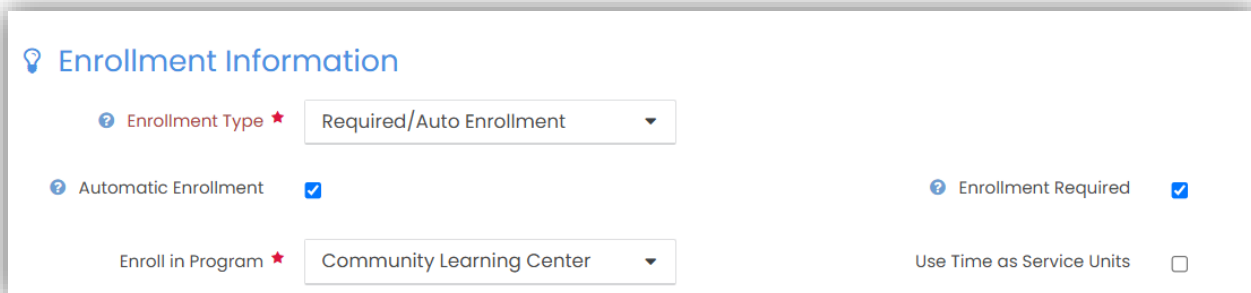
The Contact Preferences section is used to configure when confirmation and reminder emails are sent to the Client about their reservations for the Usage.

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.

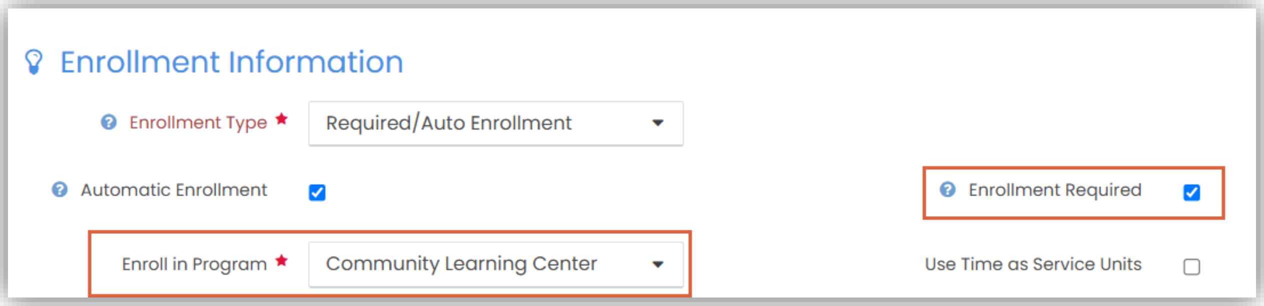


Enrollment Type defines how a program enrollment is managed. Options include “Required/Auto Enrollment”, “Enter Enrollment”, “Enter Enrollment Optional”, and “No Action Required”.

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.

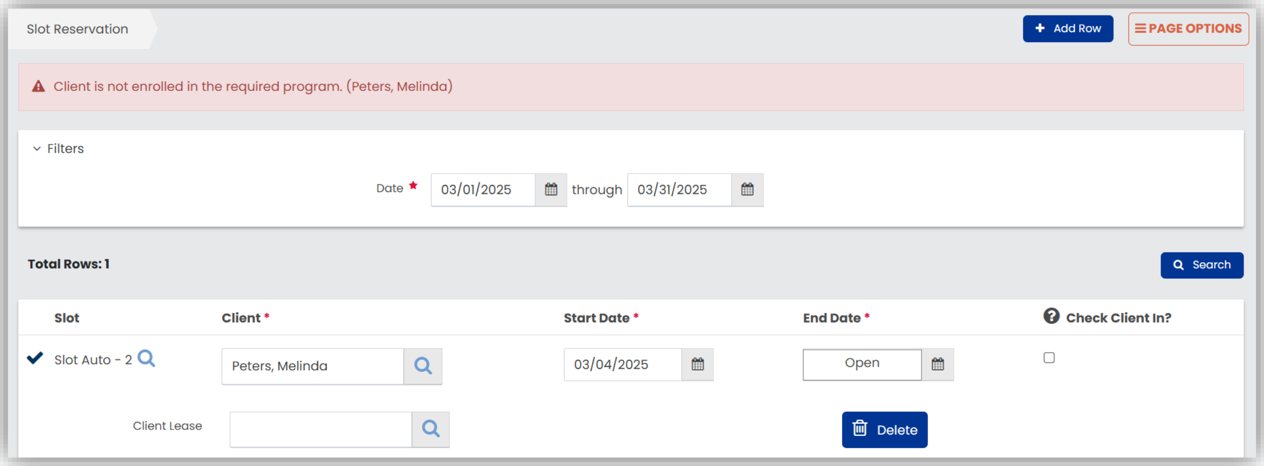


Select **Enrollment Required** if the Client must be enrolled in the specified program to access this Usage.

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:

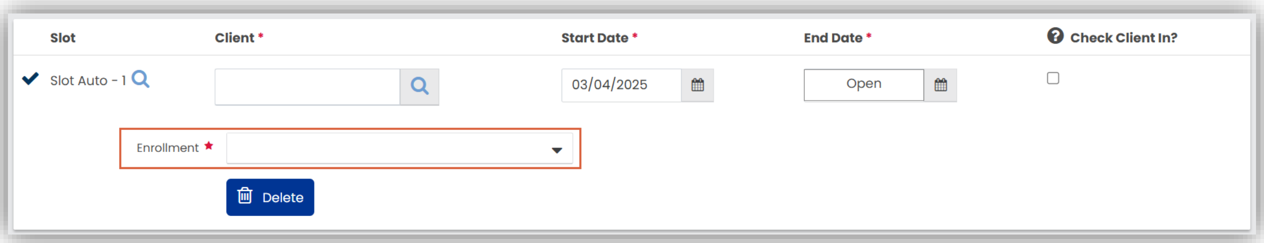
- When **Enrollment Required** is selected, the Client will not be allowed access to this Usage if they are not already enrolled in the program identified in **Enroll in Program**.



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

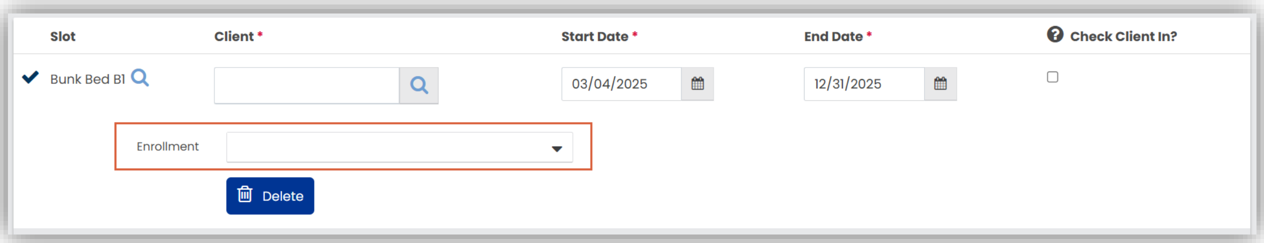
Enter Enrollment

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



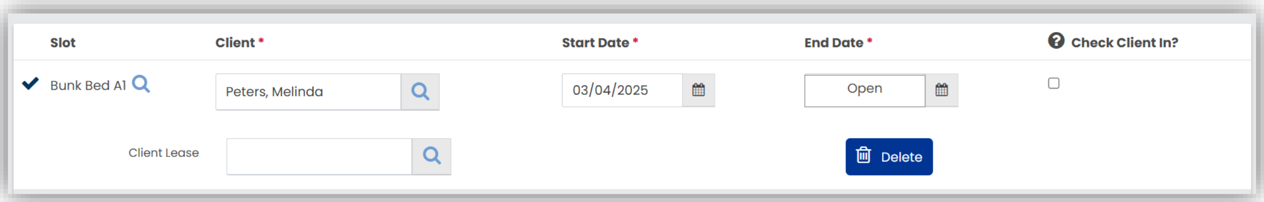
Enter Enrollment Optional

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.



No Action Required

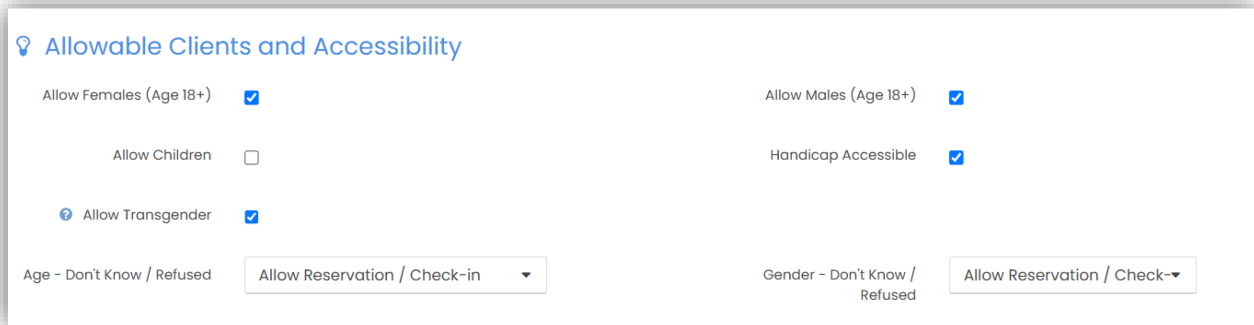
When “No Action Required” is selected, the User entering the reservation or during check-in will not be presented with an option to select a program enrollment. If this option is selected, the Usage will not be reportable in association with a program.

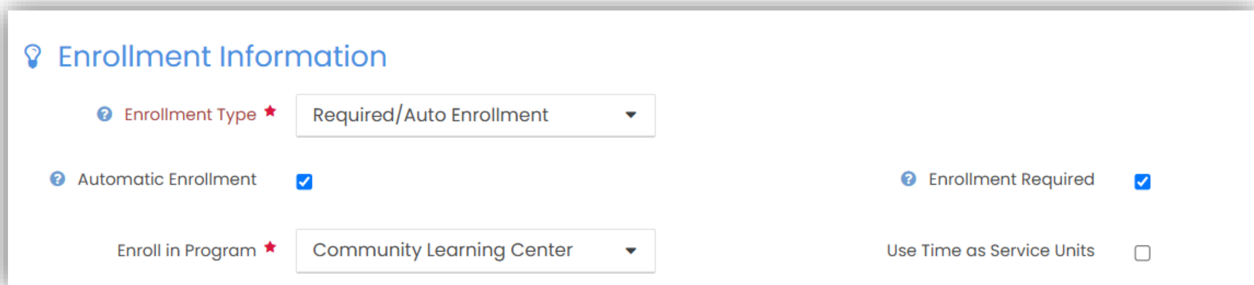


For this example, select “Required/Auto Enrollment” as the **Enrollment Type**. Also select both **Automatic Enrollment** and **Enrollment Required**. Also select an appropriate service for **Enroll in Program**.

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.





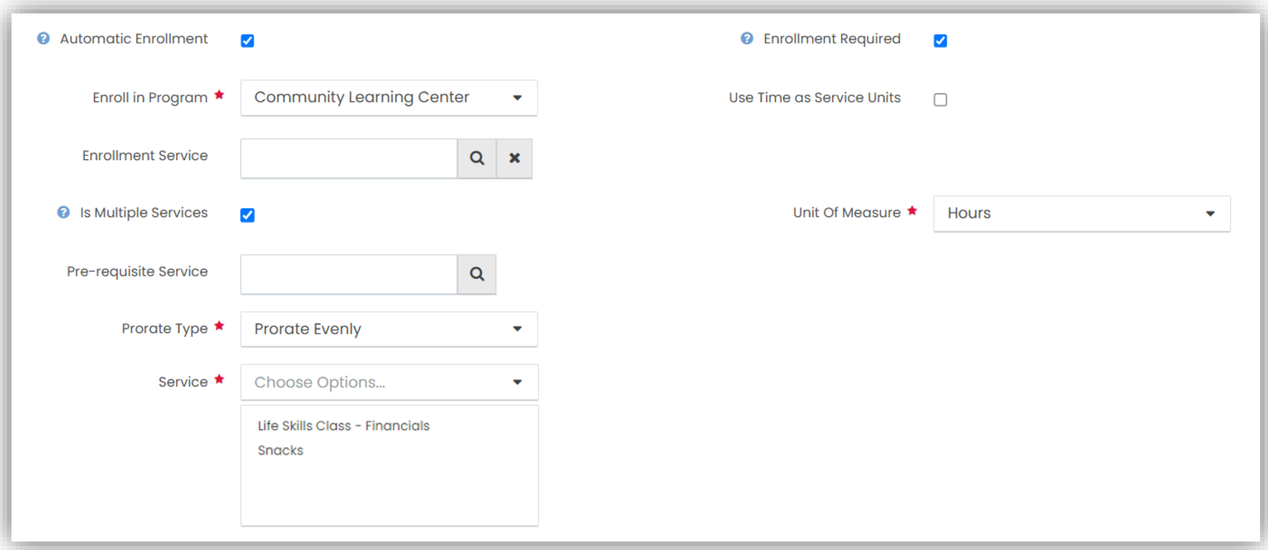
Next is **Use Time as Service Units**. When selected, the unit of time will be used rather than the unit configured for the service. This field is not required.

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.

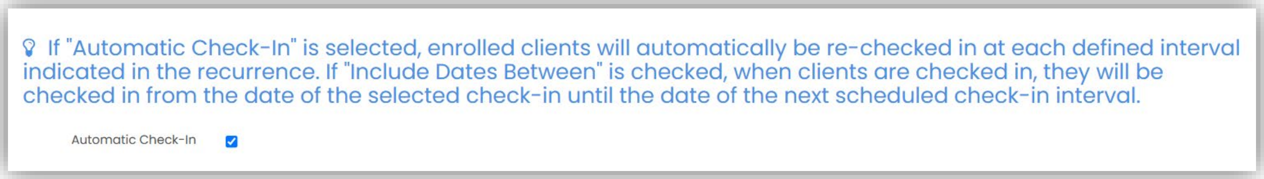
Options include:

- “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.

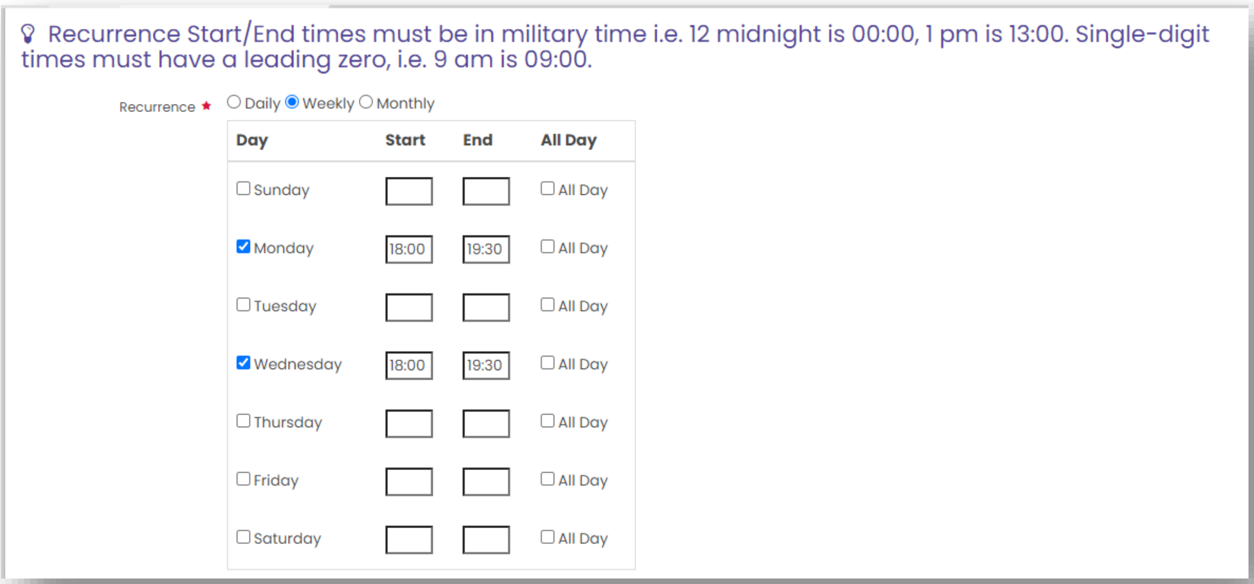
When selected, an automatic batch process will run overnight to check the Client in for each night of their reservation. This keeps the User from having to record the check-ins manually each day.



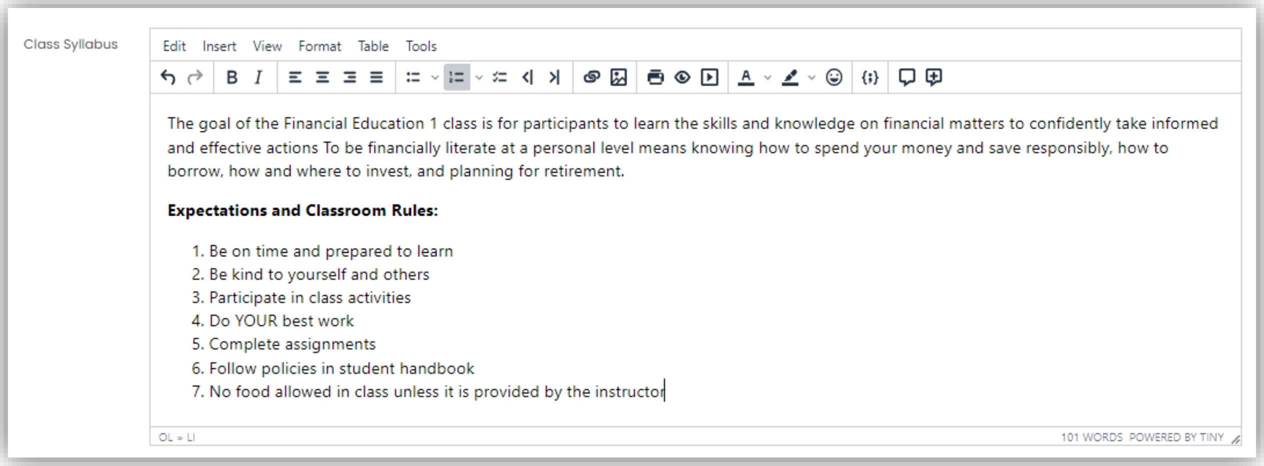
Recurrence sets when the Usage is available.

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.



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.



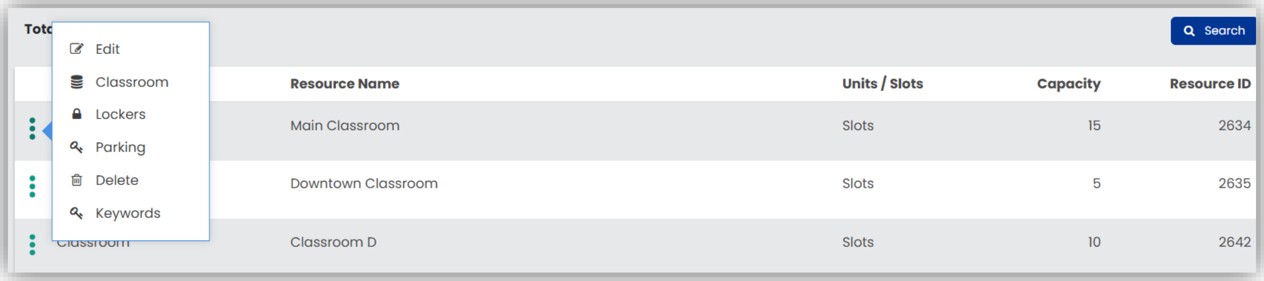
SAVE the new Resource Usage.

Lockers

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

Let's start with lockers.

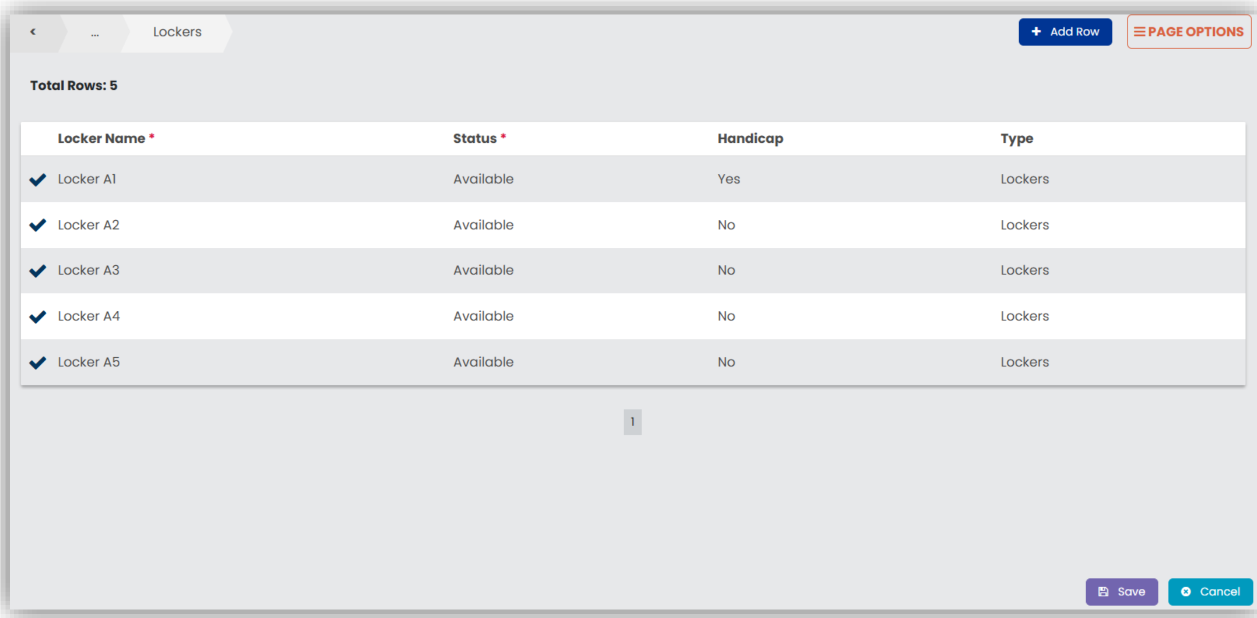
Once lockers are created, they can be associated with specific Usage slots or assigned to Clients.



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.



Give the locker a name.

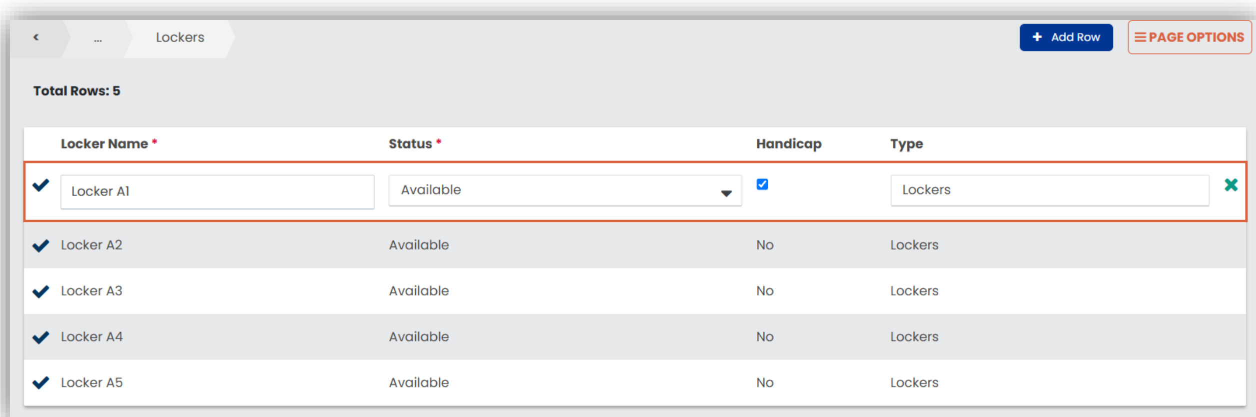
Select the **Status** of the locker, which is essentially its availability. Options include "Assigned", "Available", "In Development", and "Under Repair".

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.



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.

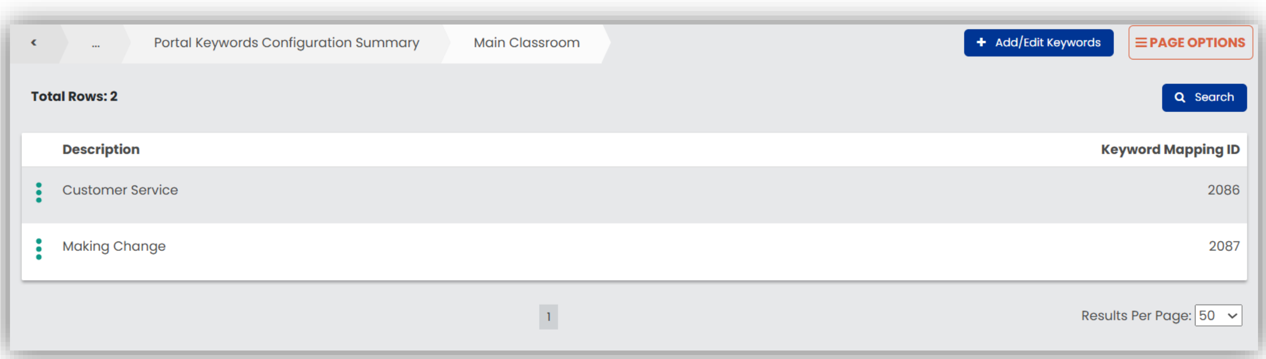
Off the Resource menu, select Parking.

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

Keywords

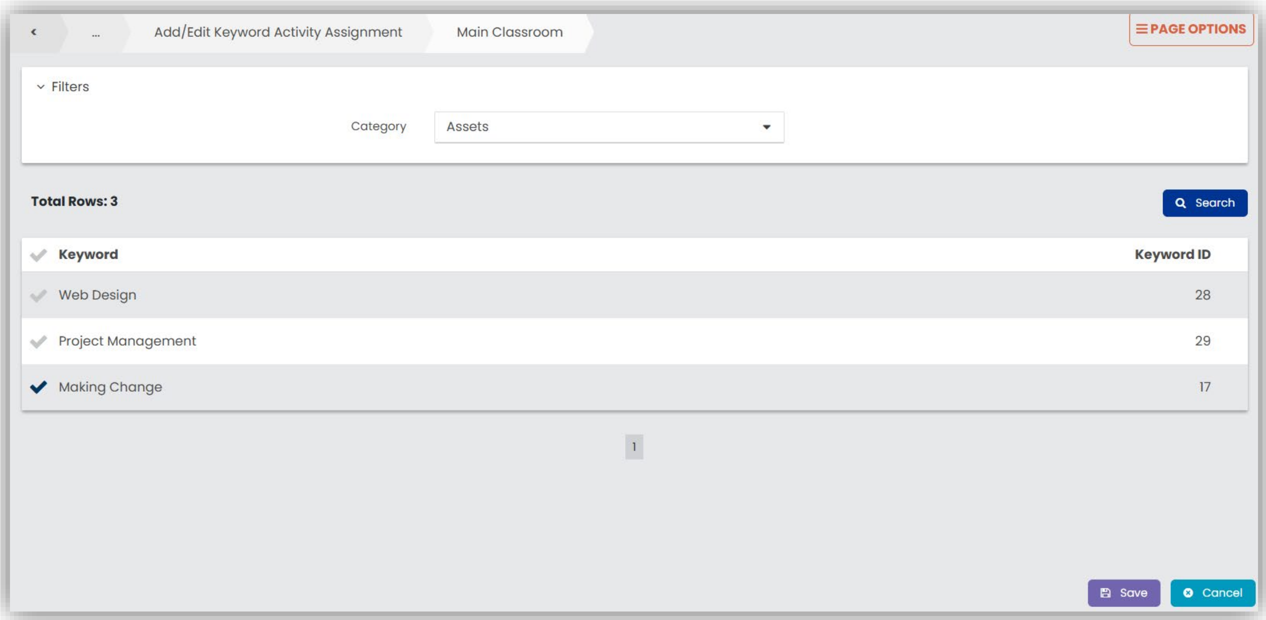
Keywords can be assigned to a Classroom Usage, which allow for filtering and ease of searching for a specific class.

Keywords are managed in Codes and Categories.



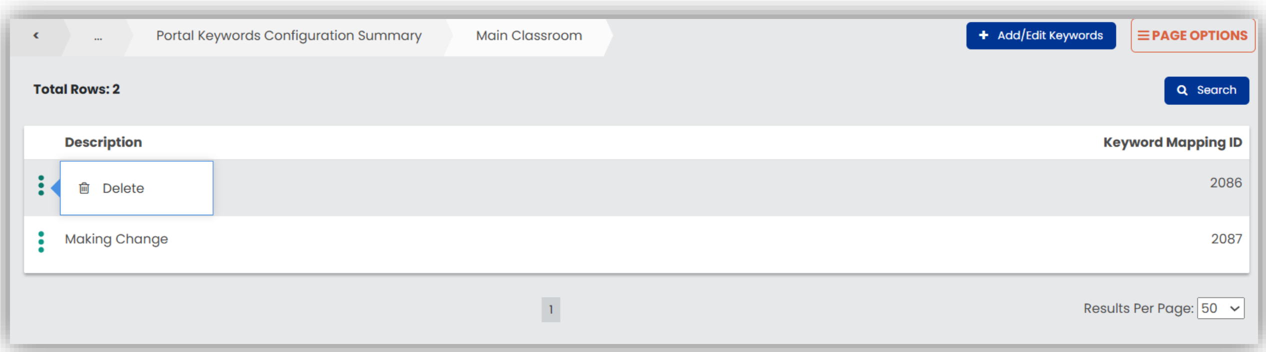
Select ADD/EDIT KEYWORDS.

Use **Category** to filter the list.



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.

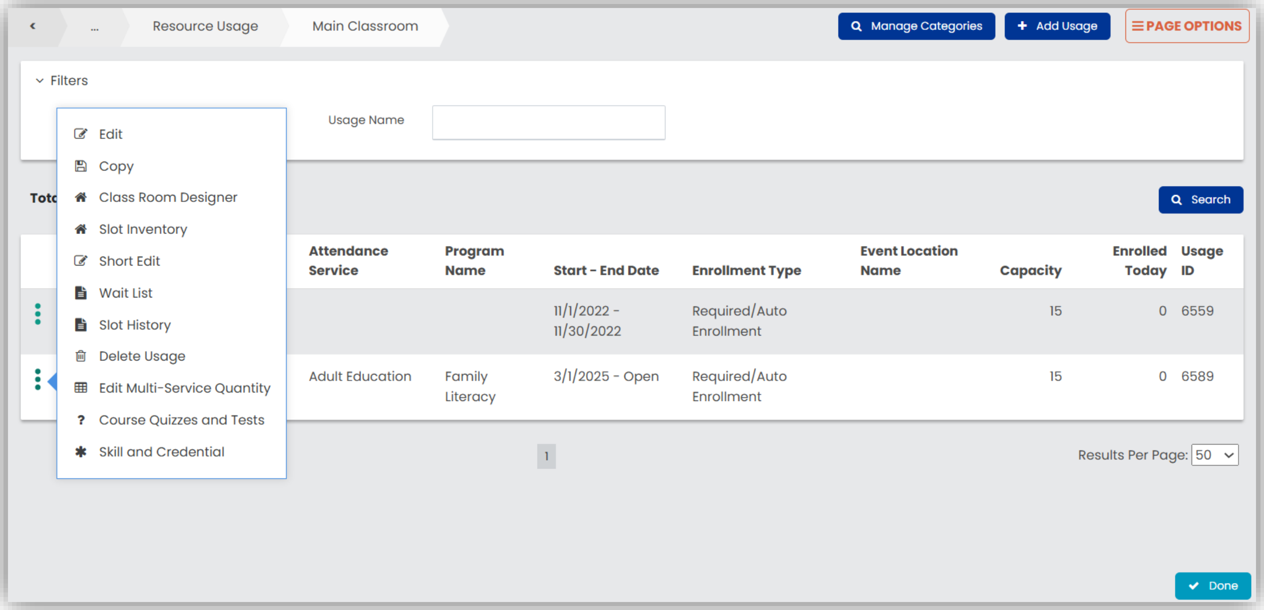


Select Delete off the record’s menu to remove the keyword from the Usage.

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.



Slot Inventory

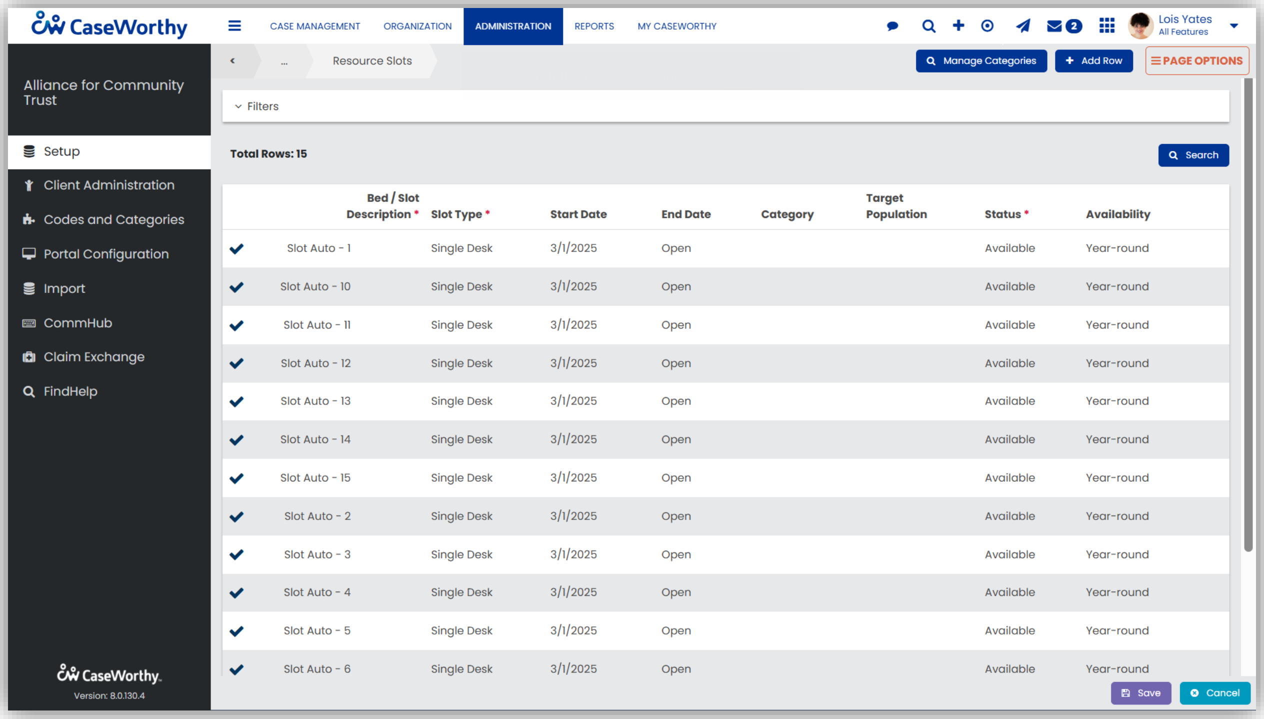
The next most logical step is to set up the Usage's slots. Slots can be created and managed using either Slot Inventory or the Class Room Designer. We will explore Slot Inventory in this example.

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.



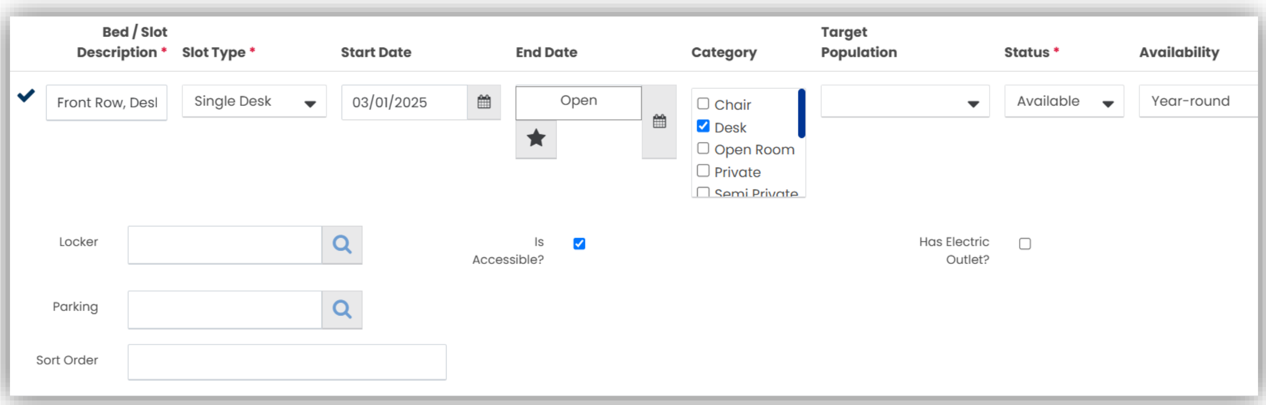
Each automatically generated slot for this Usage displays, including the identifying description, type, availability, and status based on our selections.

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.



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.

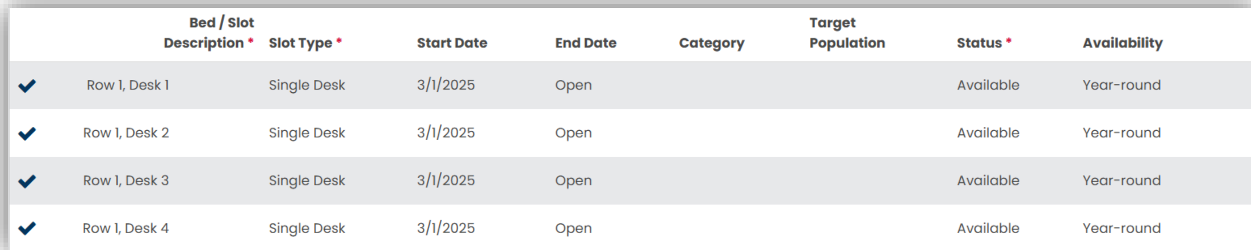
Availability is used to identify if the slot is open all year, is just used for overflow, or is offered seasonally. It is set to “Year-round” by default but can be changed.

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.

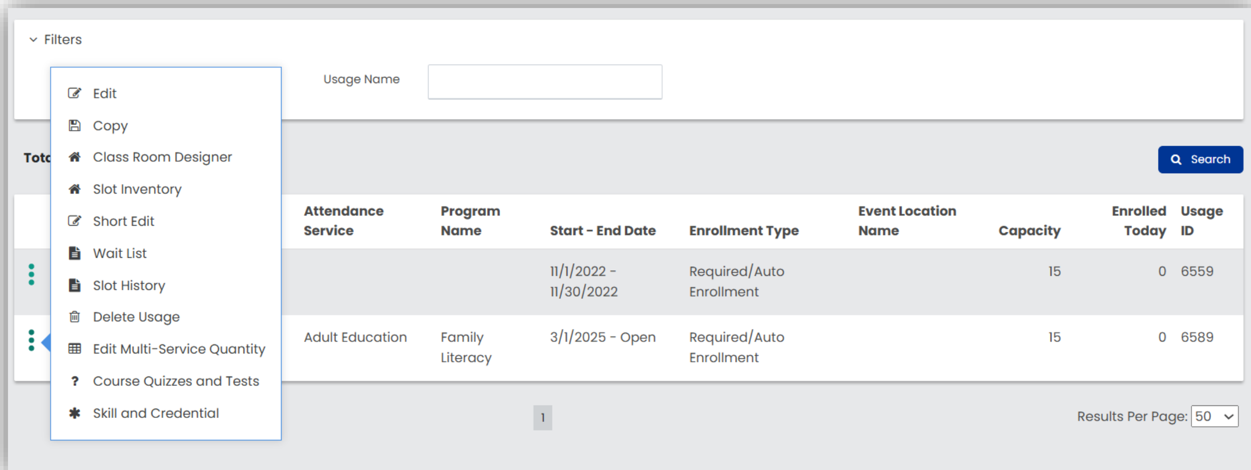


	Bed / Slot Description *	Slot Type *	Start Date	End Date	Category	Target Population	Status *	Availability
✔	Row 1, Desk 1	Single Desk	3/1/2025	Open			Available	Year-round
✔	Row 1, Desk 2	Single Desk	3/1/2025	Open			Available	Year-round
✔	Row 1, Desk 3	Single Desk	3/1/2025	Open			Available	Year-round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

When all slots are configured appropriately, SAVE the form.

Edit

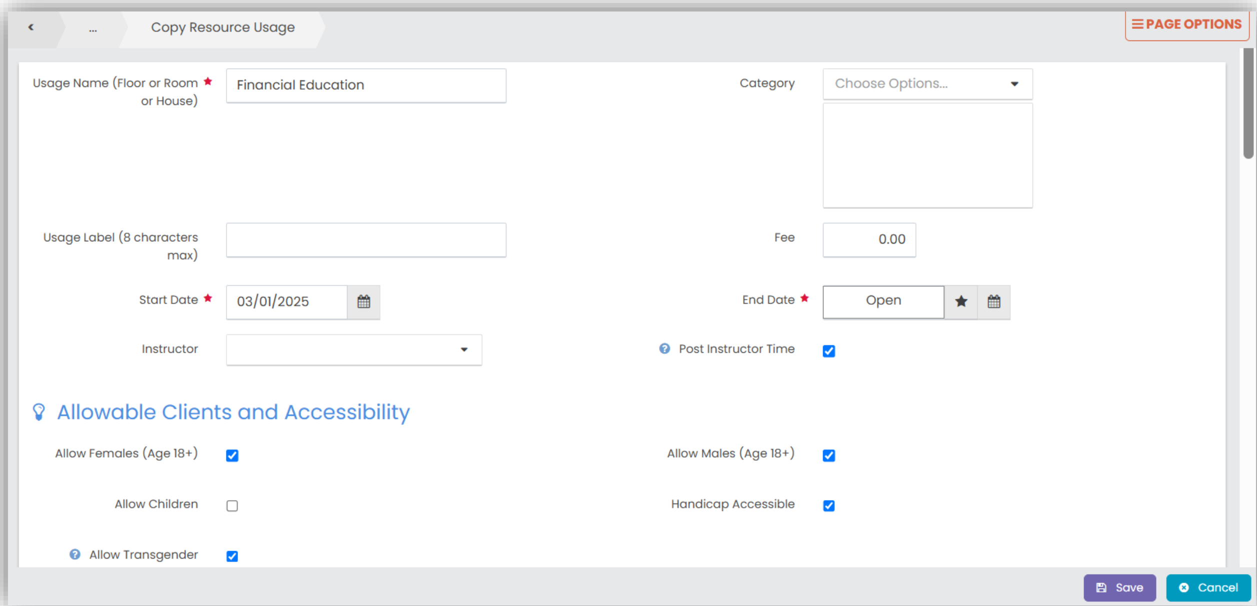
Let’s open the Usage menu again and review the other options available, starting at the top.



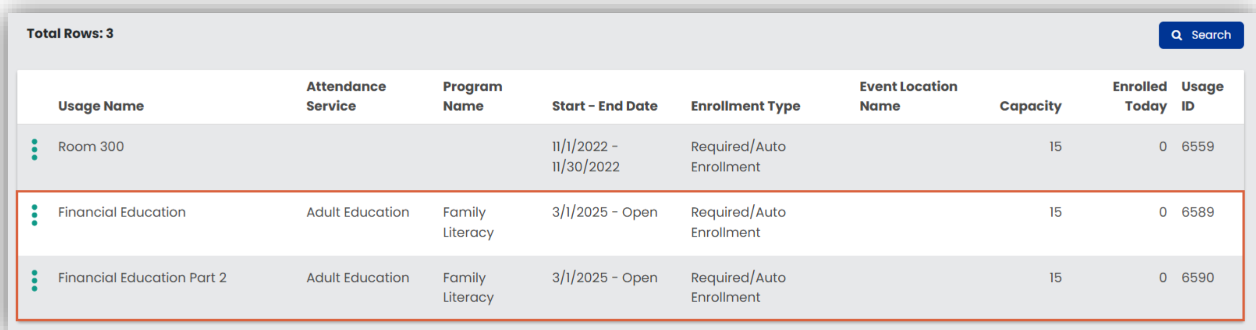
Use Edit to change details about the initial Usage setup, including the name, effective dates, and capacity.

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.



Make revisions as needed and then SAVE.



Total Rows: 3

Search

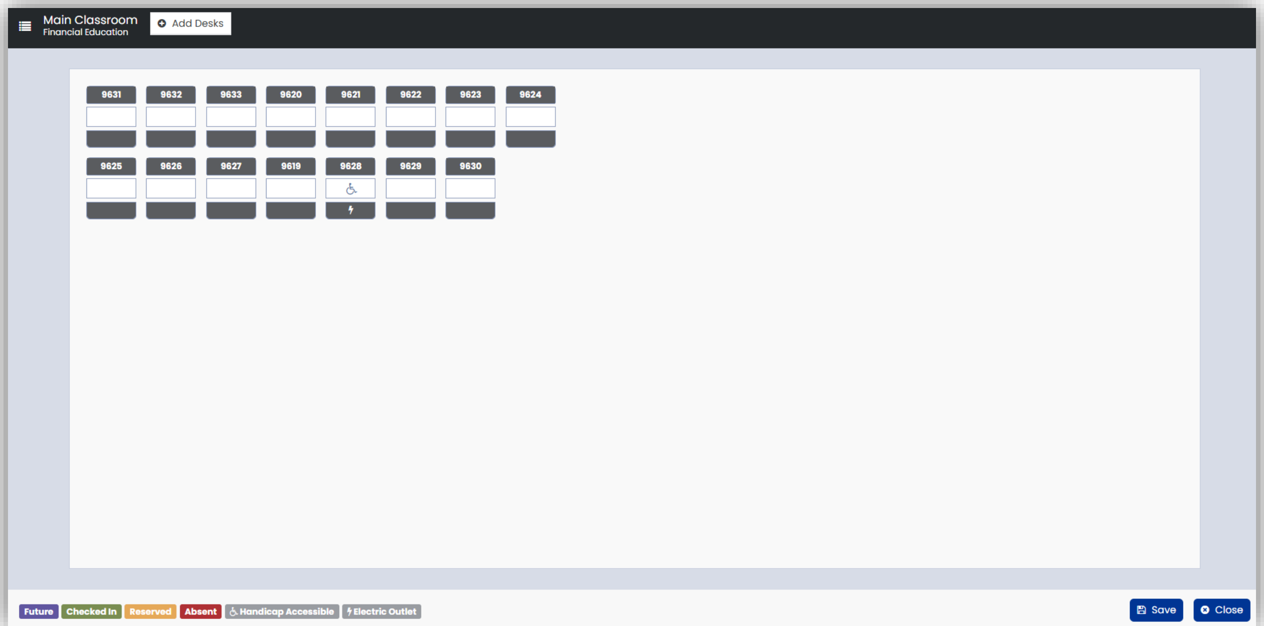
	Usage Name	Attendance Service	Program Name	Start - End Date	Enrollment Type	Event Location Name	Capacity	Enrolled Today	Usage ID
	Room 300			11/1/2022 - 11/30/2022	Required/Auto Enrollment		15	0	6559
	Financial Education	Adult Education	Family Literacy	3/1/2025 - Open	Required/Auto Enrollment		15	0	6589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

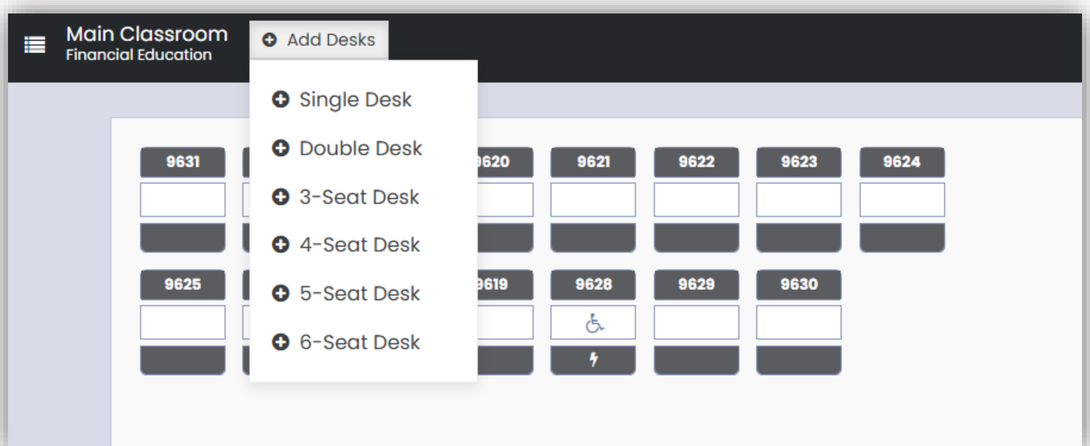
Class Room Designer

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.

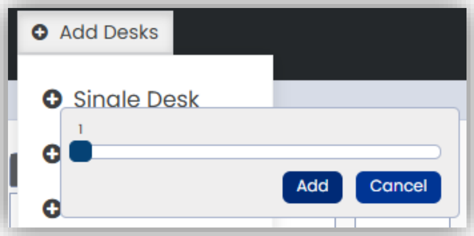


The slots displayed here were automatically generated based on the Usage capacity entered during setup.

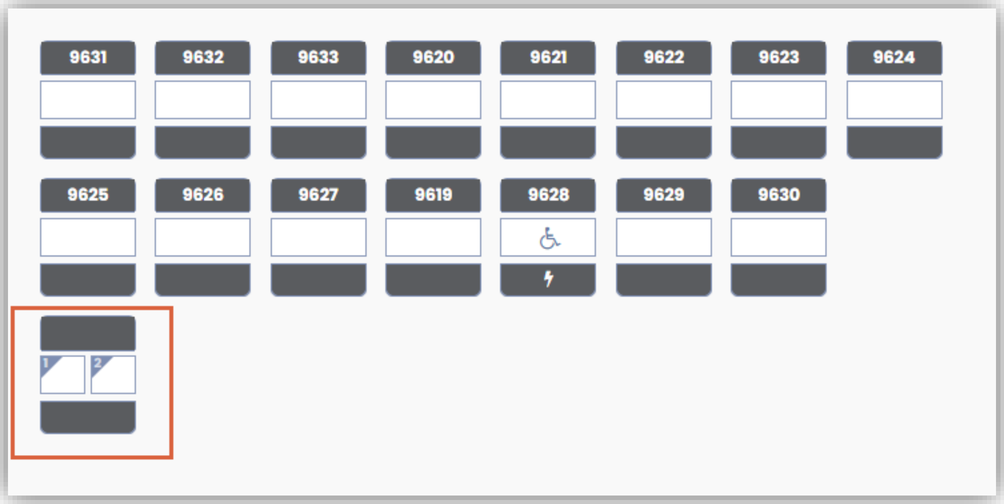
Use ADD DESKS to add slots within the Room Designer, including single desks, double desks, and more.



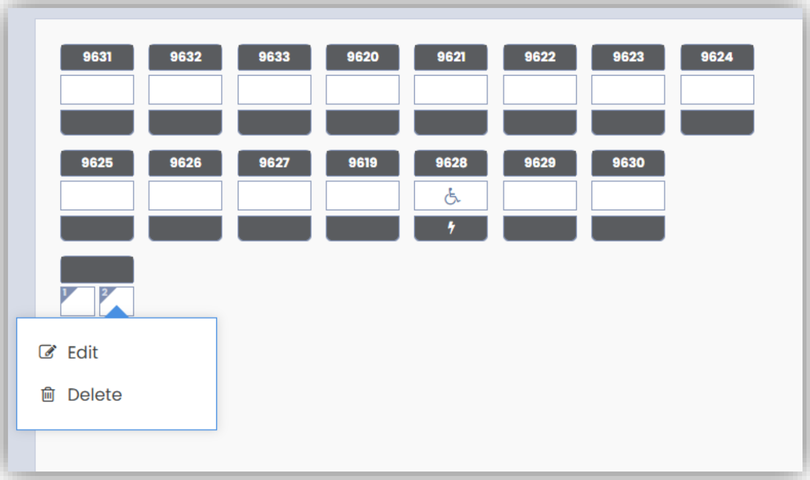
When you select the desk option, you are then prompted to select how many desks to add. Use the slider, and then select ADD.



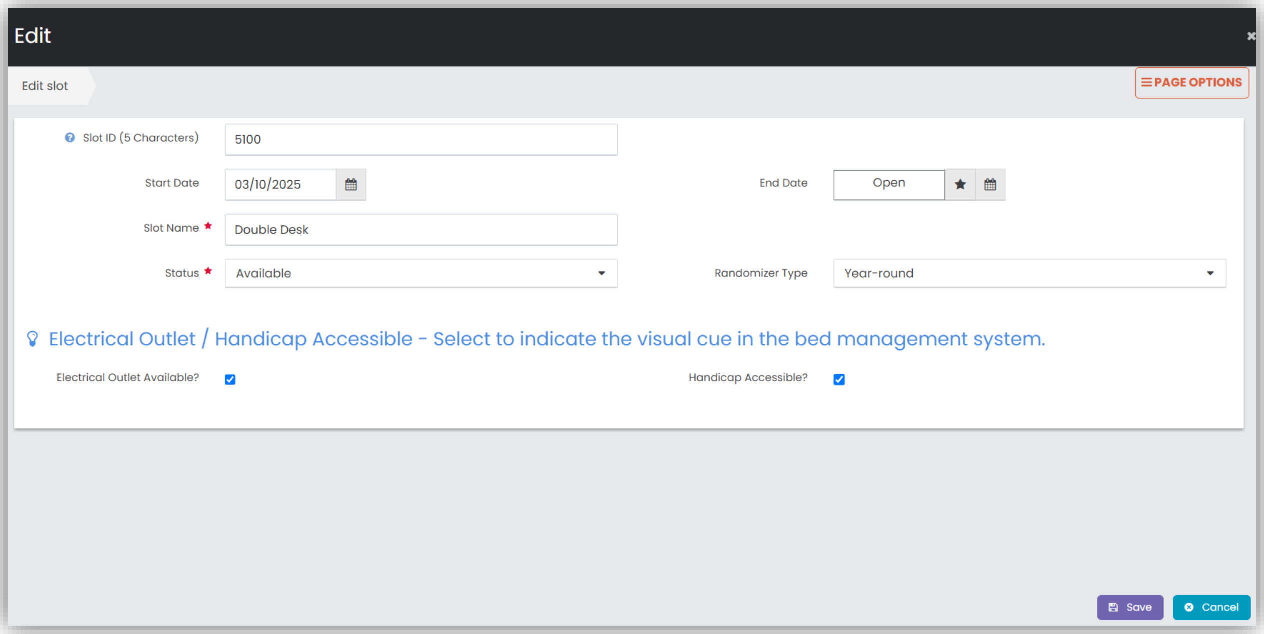
The Class Room Designer then updates to reflect the initial inventory plus the newly added slot. The double desk option creates two slots that will appear together.



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

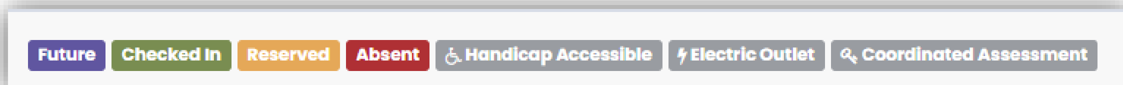


In the *Edit* window, you can update the slot's availability, name, status, accessibility, and more.

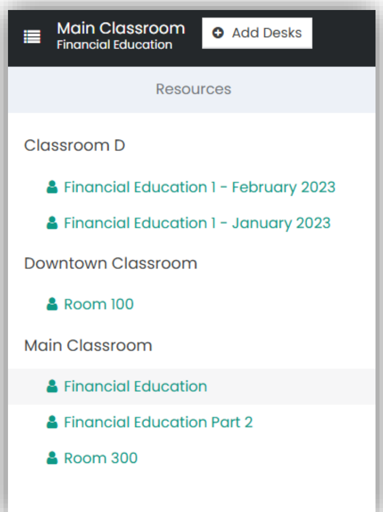


Notice now, the slot ID has been updated to “5100” and the slot also displays icons indicating it is handicap accessible and has an electrical outlet.

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.



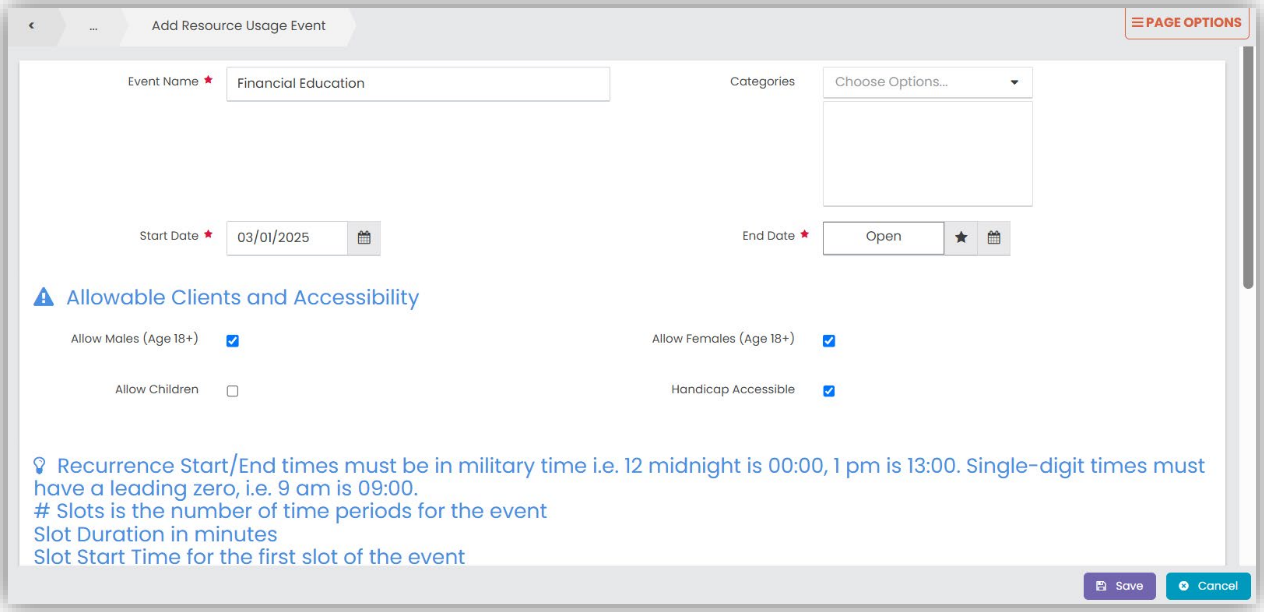
The View Resources menu in the top left corner allows you to quickly access the Class Room Designer for the Provider’s other Resources.



Select SAVE to record the slot inventory changes.

Short Edit

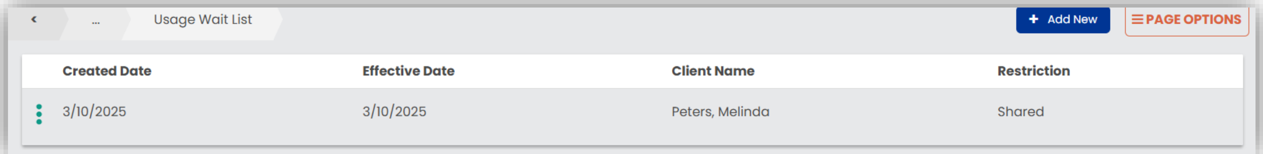
Short Edit allows for quickly editing key details about the Usage, including the Usage name, category, dates, allowable Clients, accessibility, and recurrence.



Wait List

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

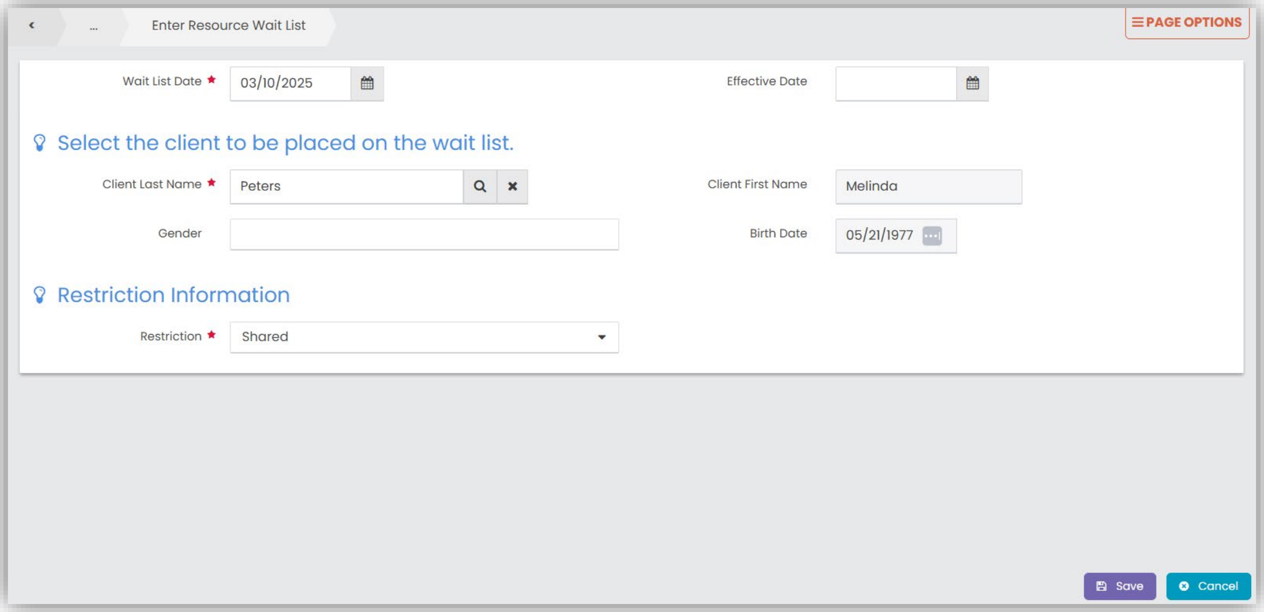
This list displays all Clients waiting for a reservation and can be accessed at any time.



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.

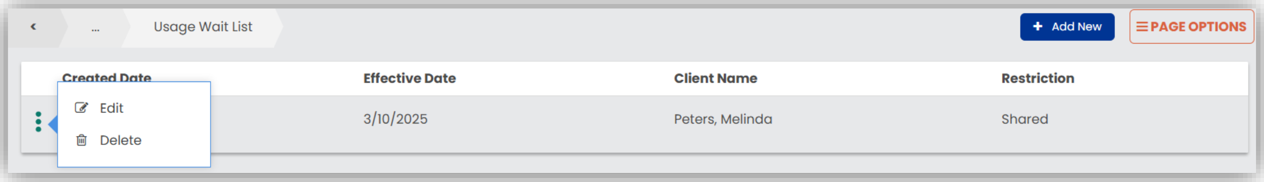
Use ADD NEW to include a Client on the waitlist.

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



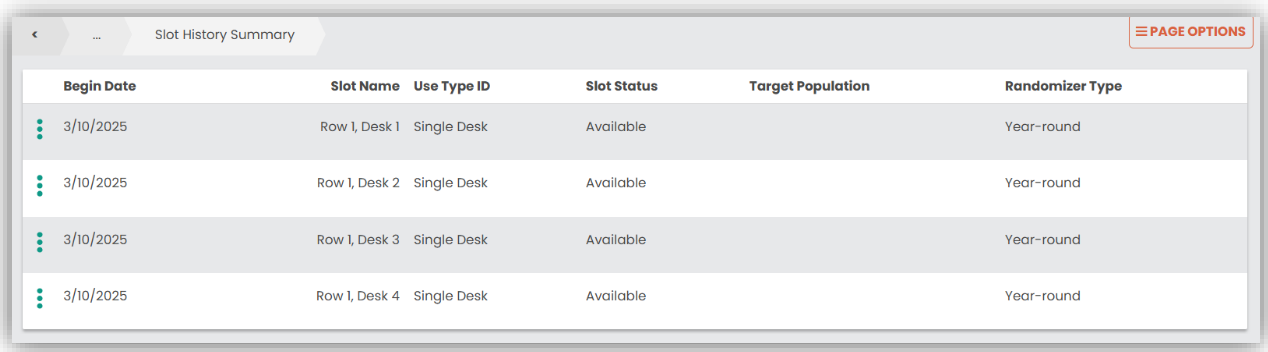
Select SAVE when done.

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.



Slot History

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



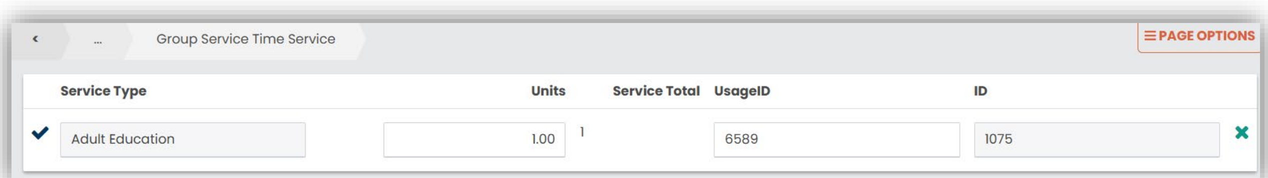
The details for each slot are displayed, and each slot can be edited or deleted from its menu as needed.

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.



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.

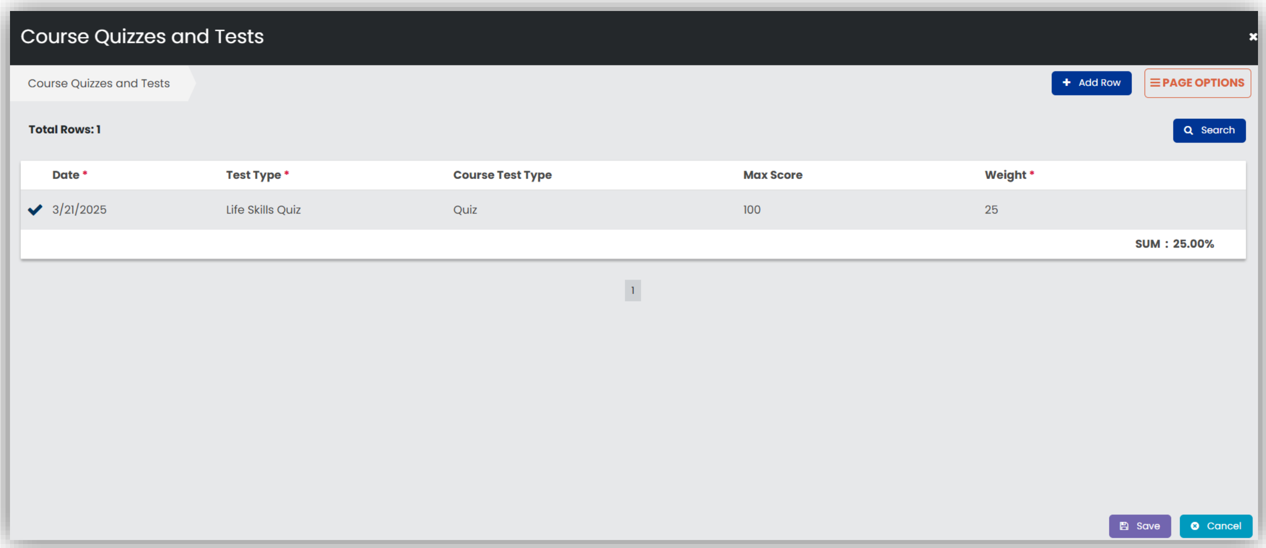
Select a record to change the number of service **Units** that will be recorded for the Client. Or use the X to delete the service. If deleted, the service will no longer be posted to the Client's record for this Resource Usage. It will remain on the other Usages for this Resource.

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.

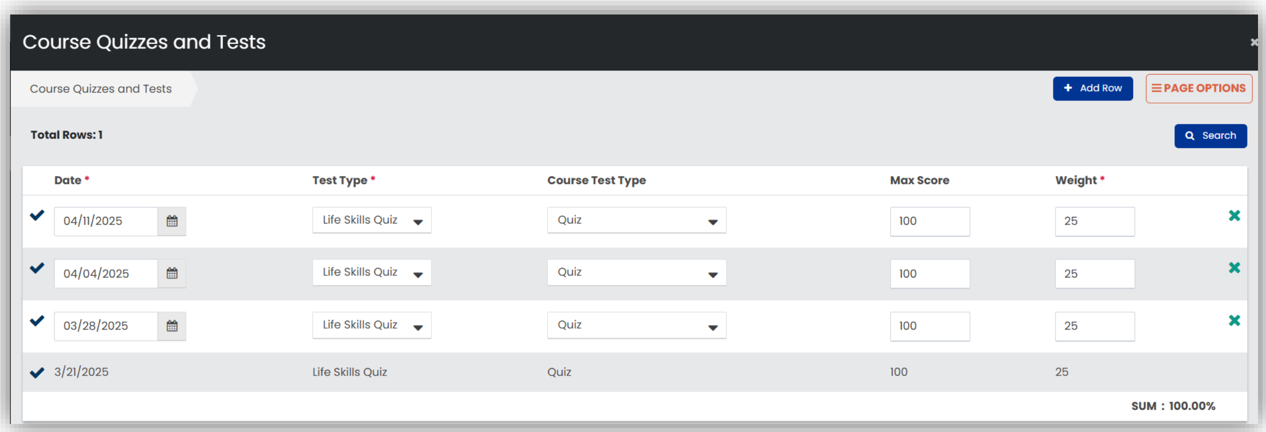
Click ADD ROW to create a new one.



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

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

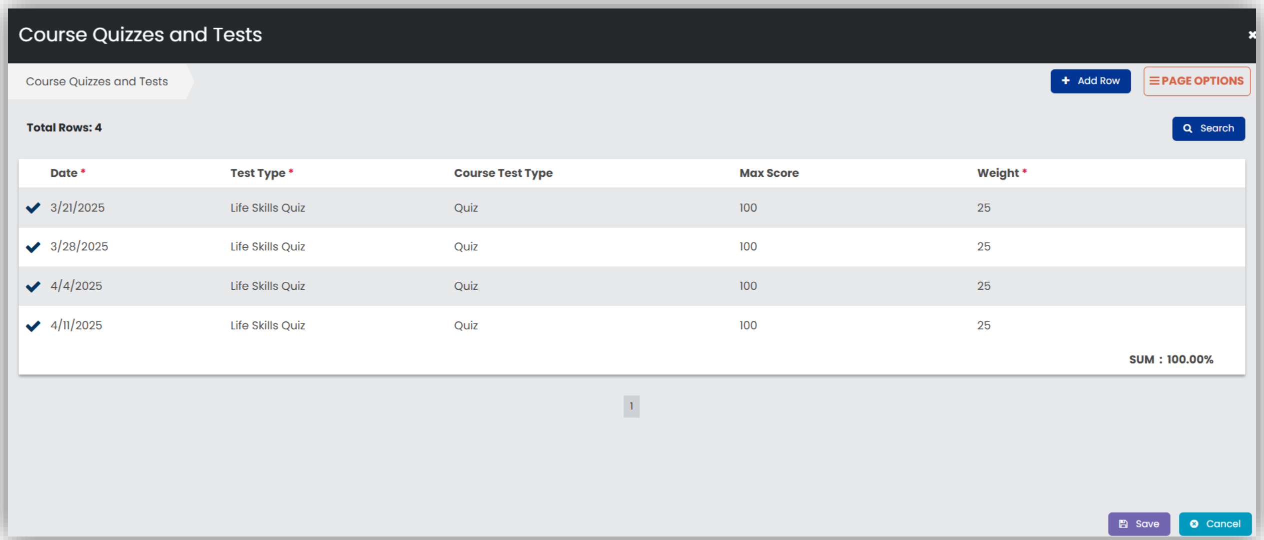
Options can include a specific subject like Math or History but can also include other items such as Job Search and Interview Skills. The test types displayed are set in Codes and Categories.



Course 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”.



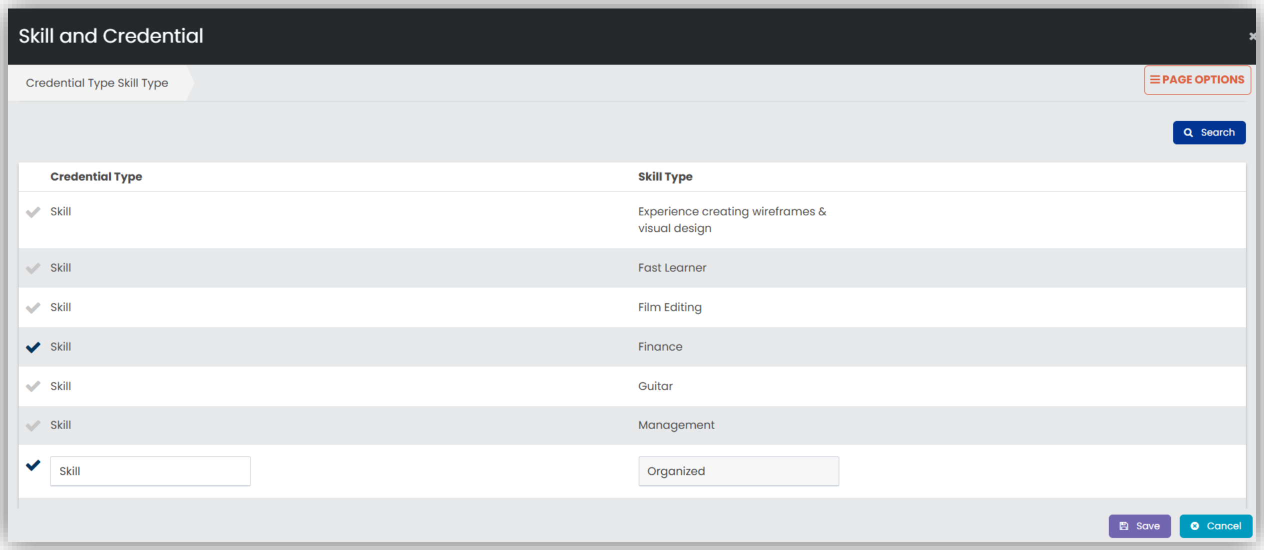
Add all applicable tests and be mindful of the **Weight** total not exceeding 100%.

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.



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.

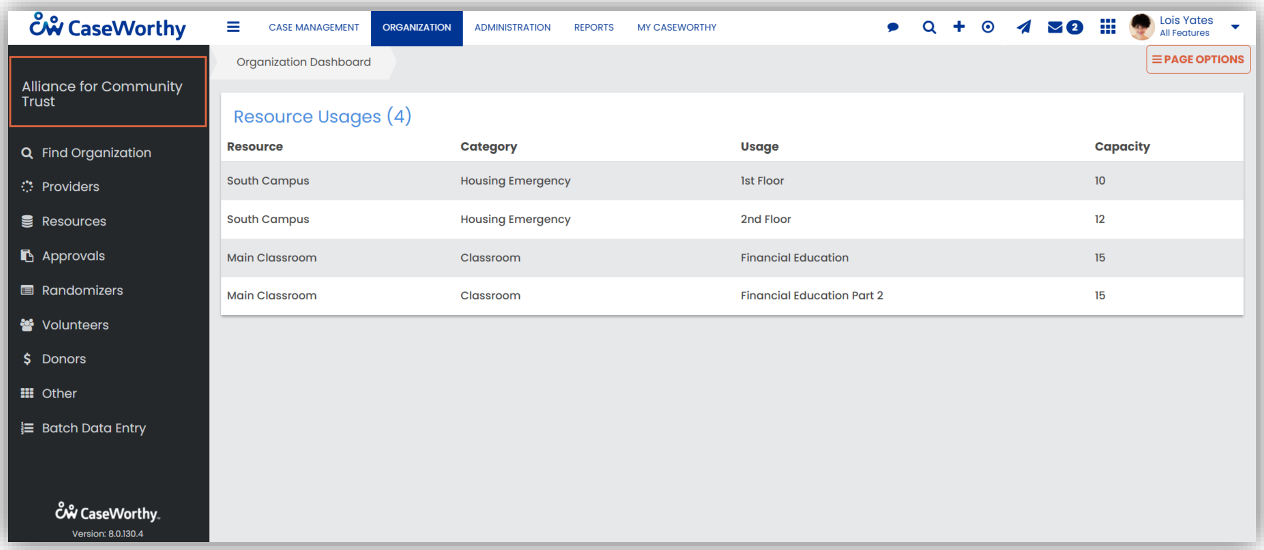
The Case Management tab also provides access to the Resource for any Client within the selected Organization but also allows you to view and manage a Client's classwork, assign lockers and parking spaces to the Client, view the Client's appointment calendar, view a list of suggested classes for the Client,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

Let's begin by exploring the Organization tab.

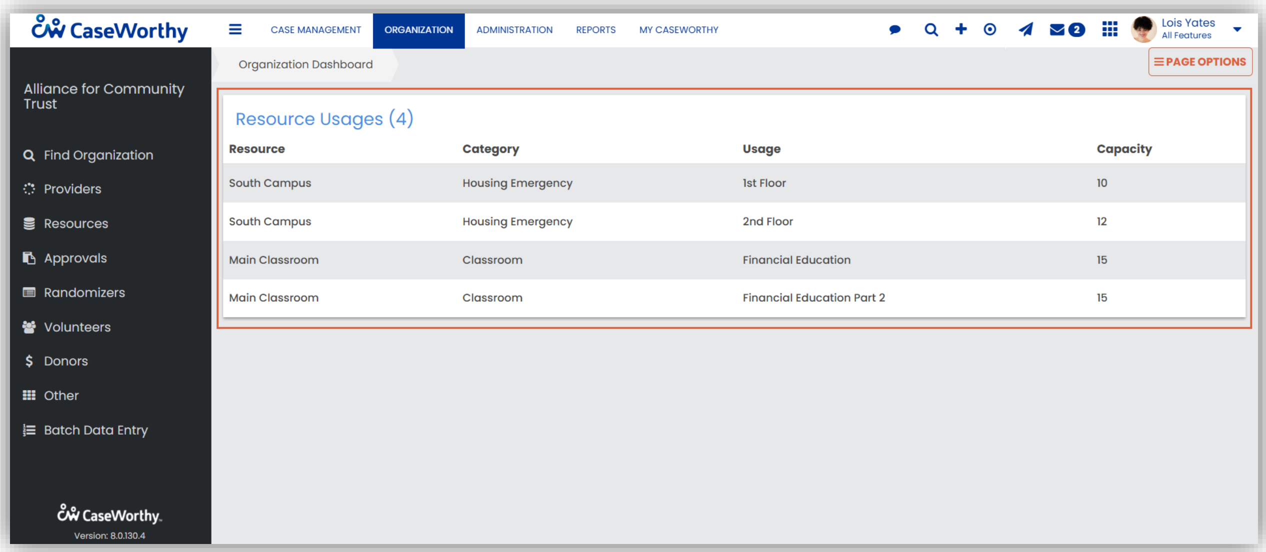
Organization Tab

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 *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.

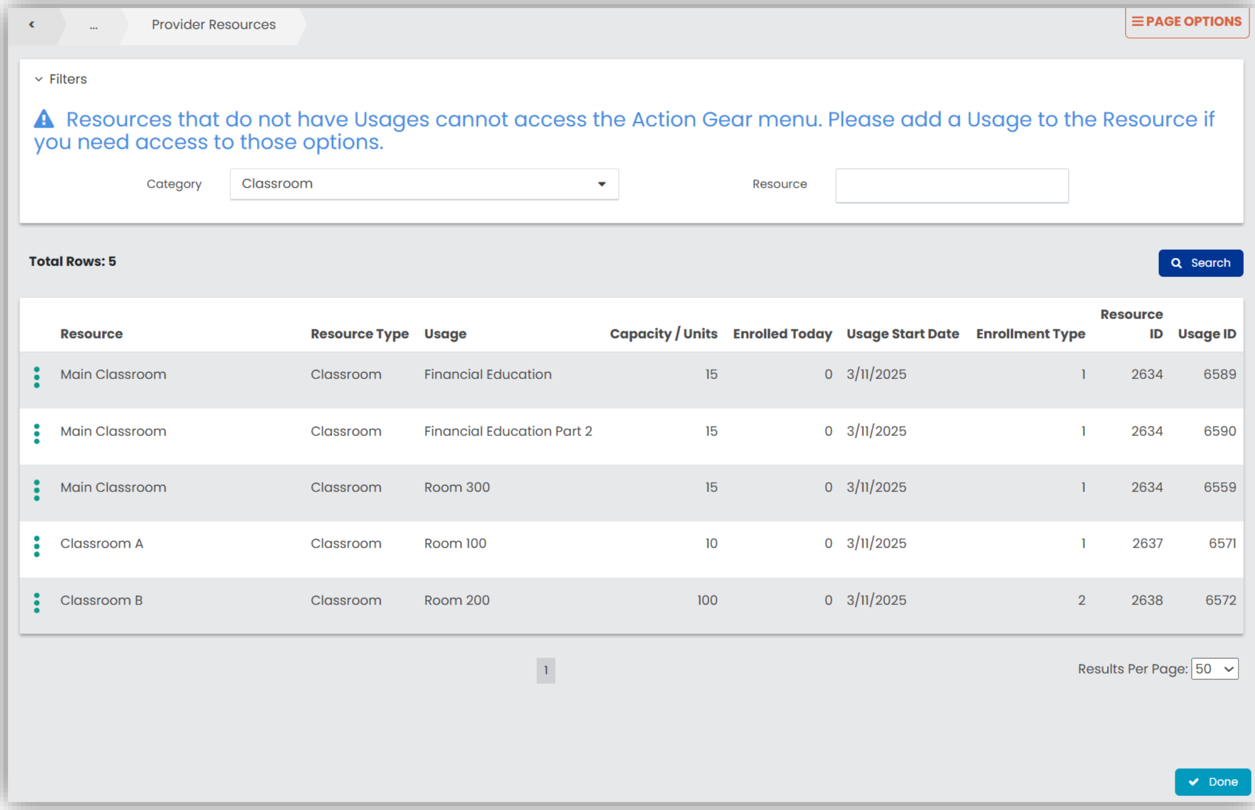


Notice the new Classroom Resource includes two Usages, the original Usage created from the example, and the Copy we created for part 2 of the course.

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.



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.

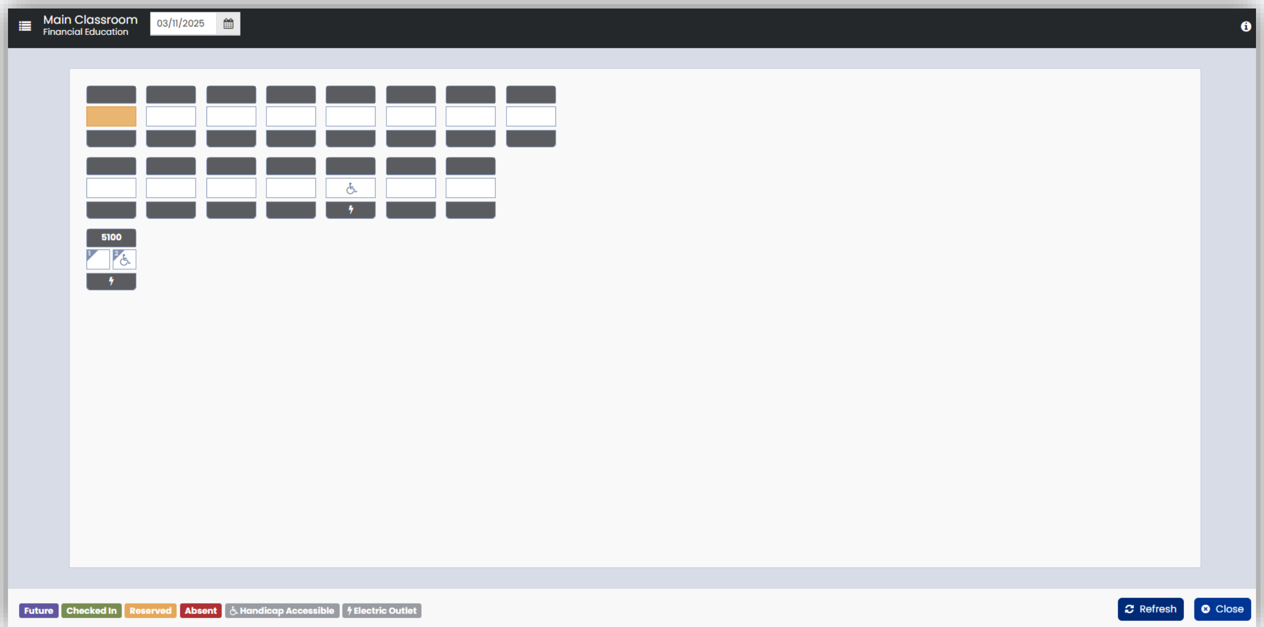
Resource Menu

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

Slot Check in Manager

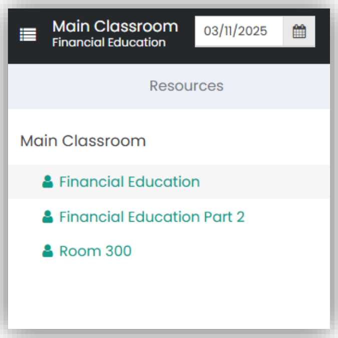
Off the Usage menu, select Slot Check In Manager.

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.

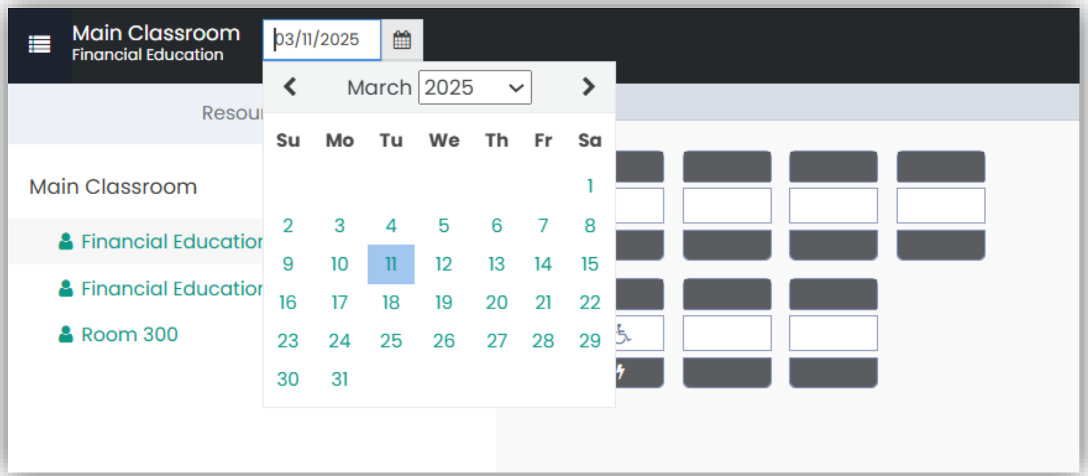


At the top, there are multiple options available.

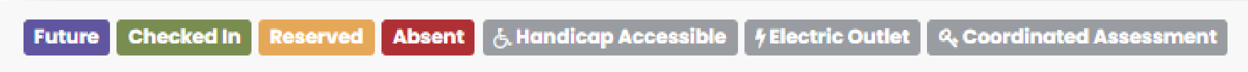
The View Resources menu in the top left corner allows you to quickly access the Slot Room Manager for the Organization's other Resources.



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.

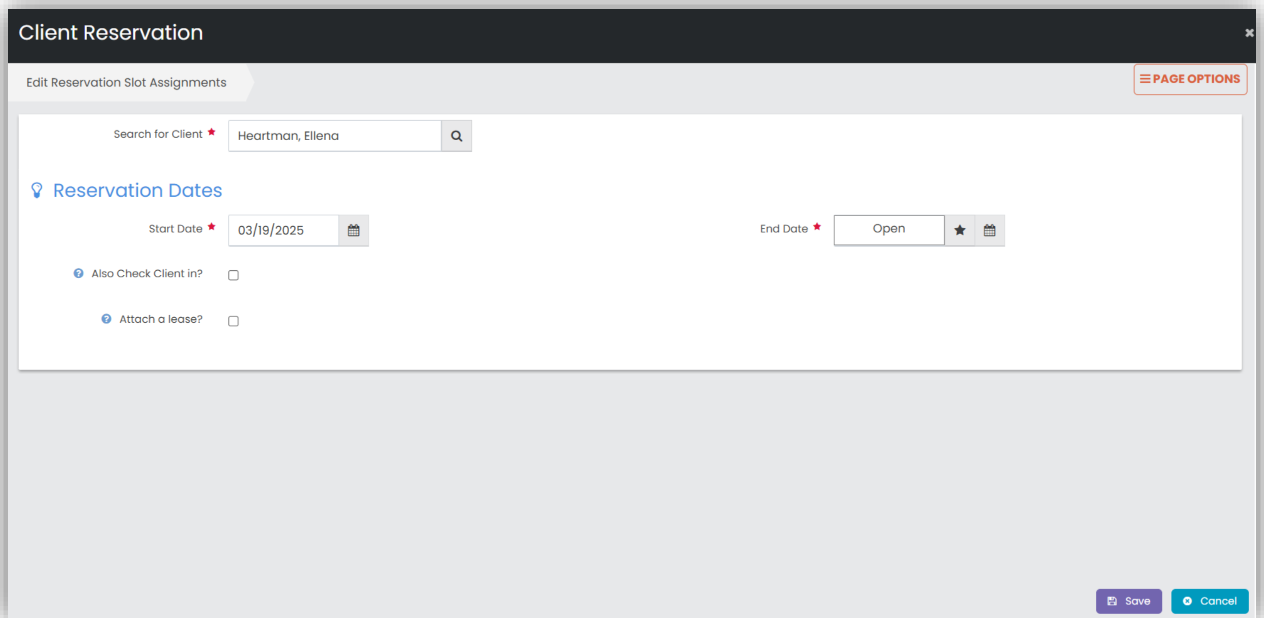
Slots that are available are highlighted with purple.

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.

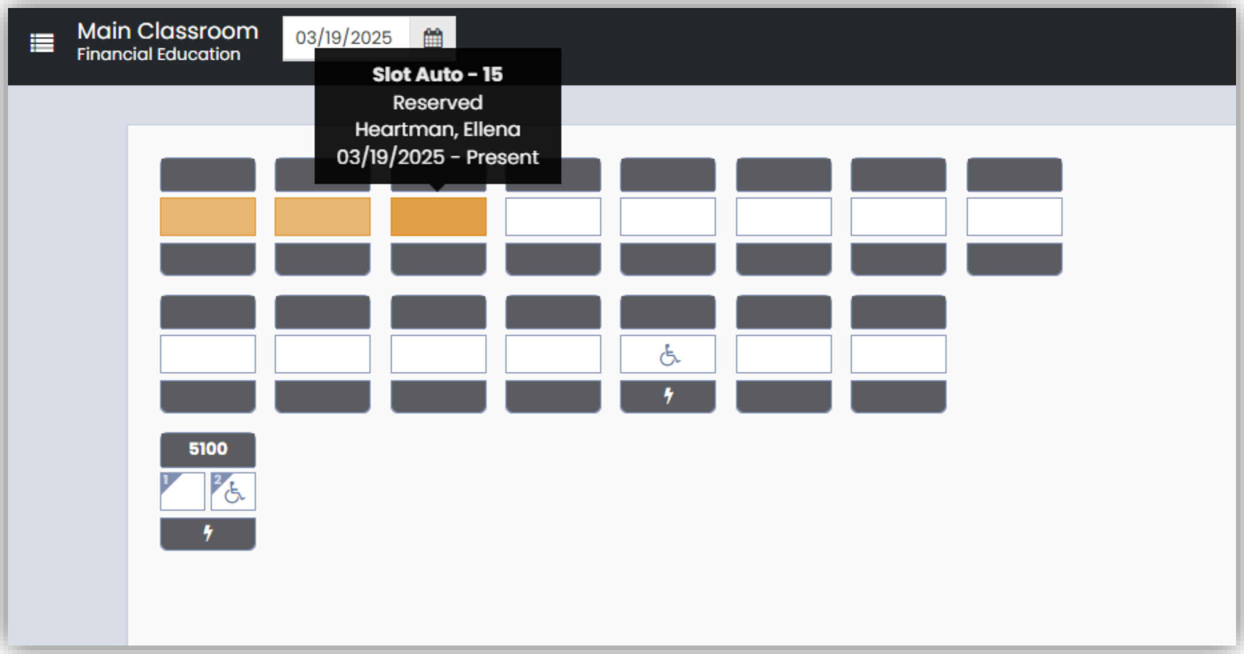
Click the lookup icon to search for a Client.



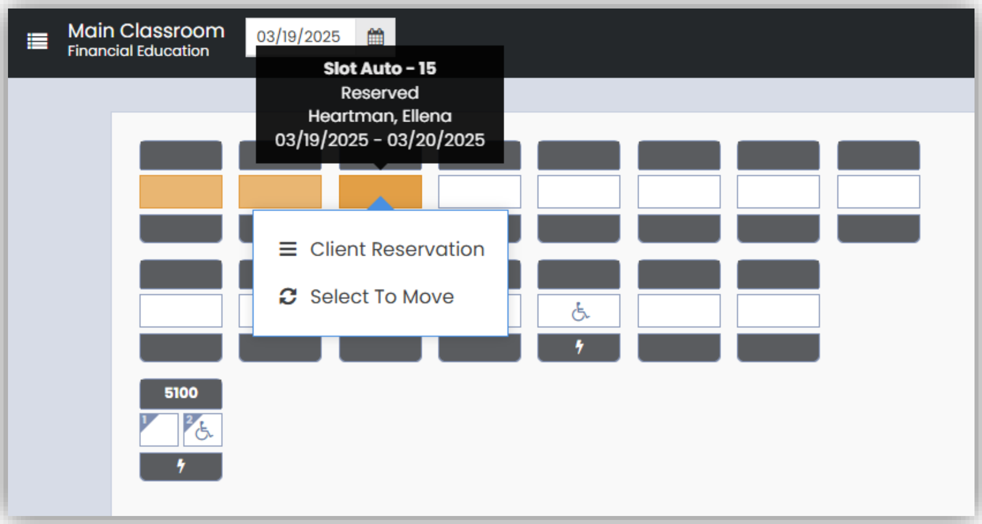
Enter the reservation dates and attach a lease agreement if necessary.

SAVE the new reservation.

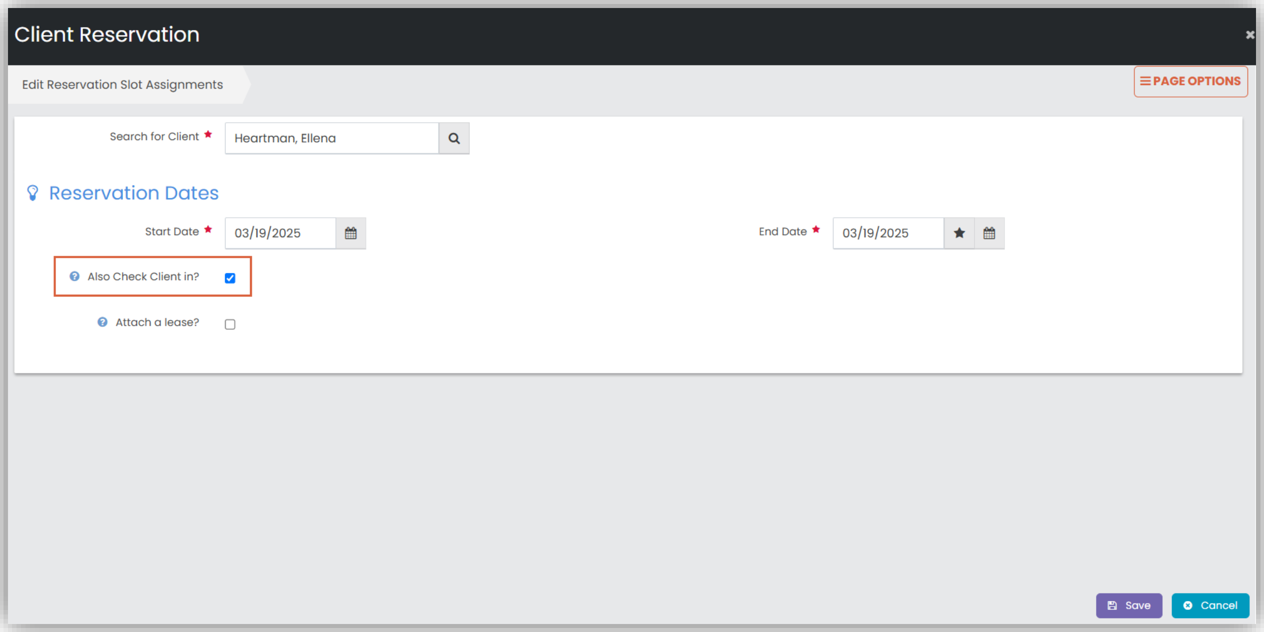
Once saved, the slot displays highlighted in yellow because the Client is reserved into the slot but is not yet checked in.



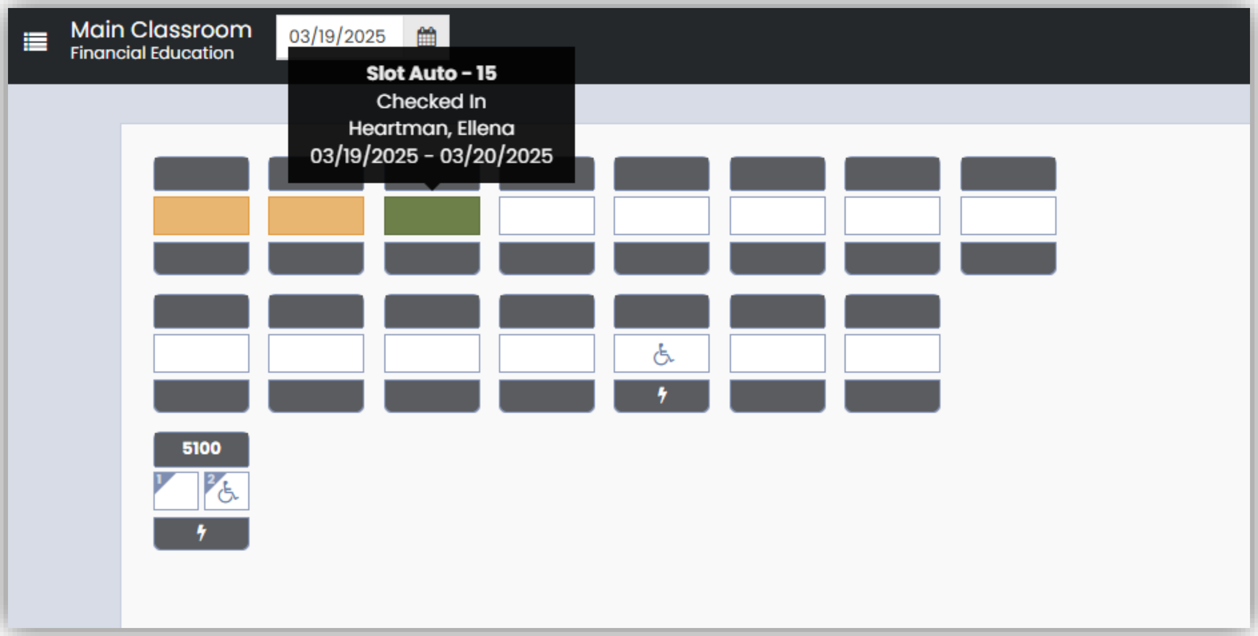
To check the Client in to the slot, select Client Reservation from the slot's menu.



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

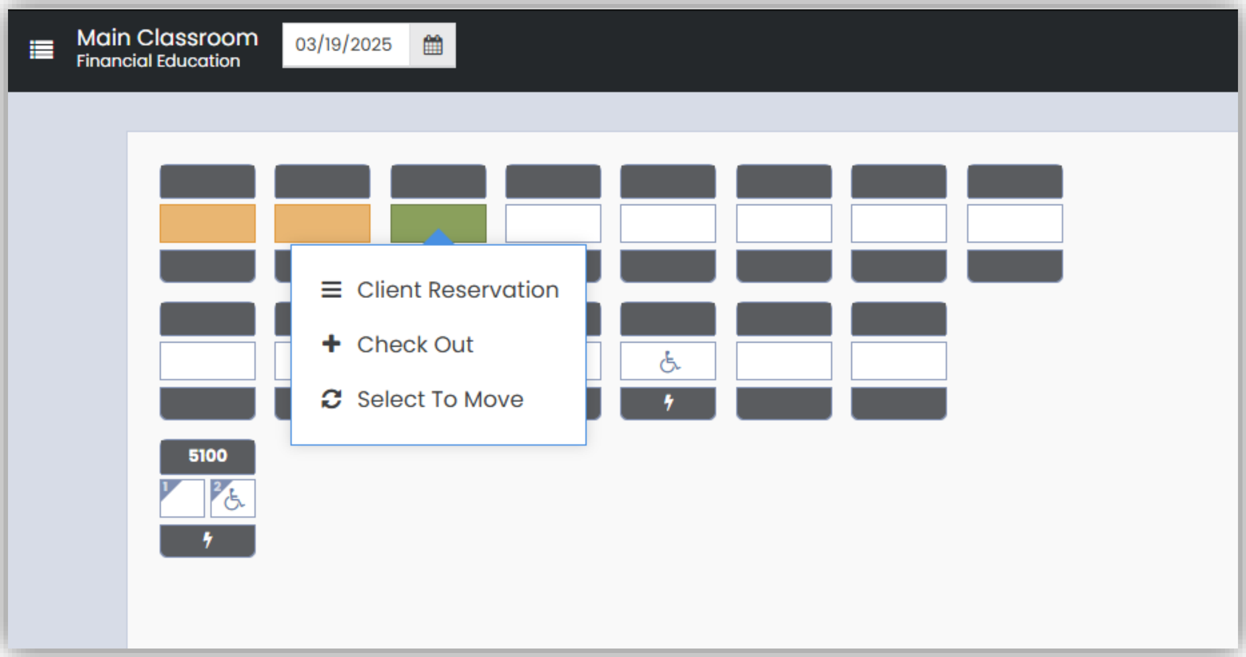


The slot is now highlighted in green to represent the Client has checked in.

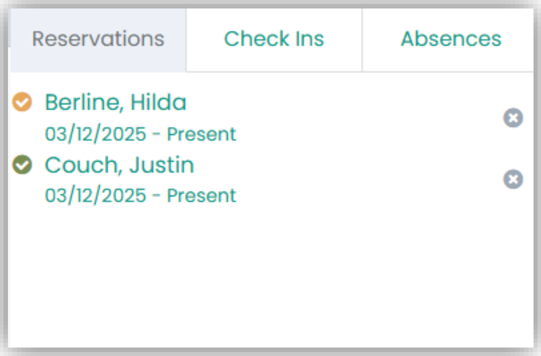


Each checked in slot (when highlighted in green) allows you to:

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



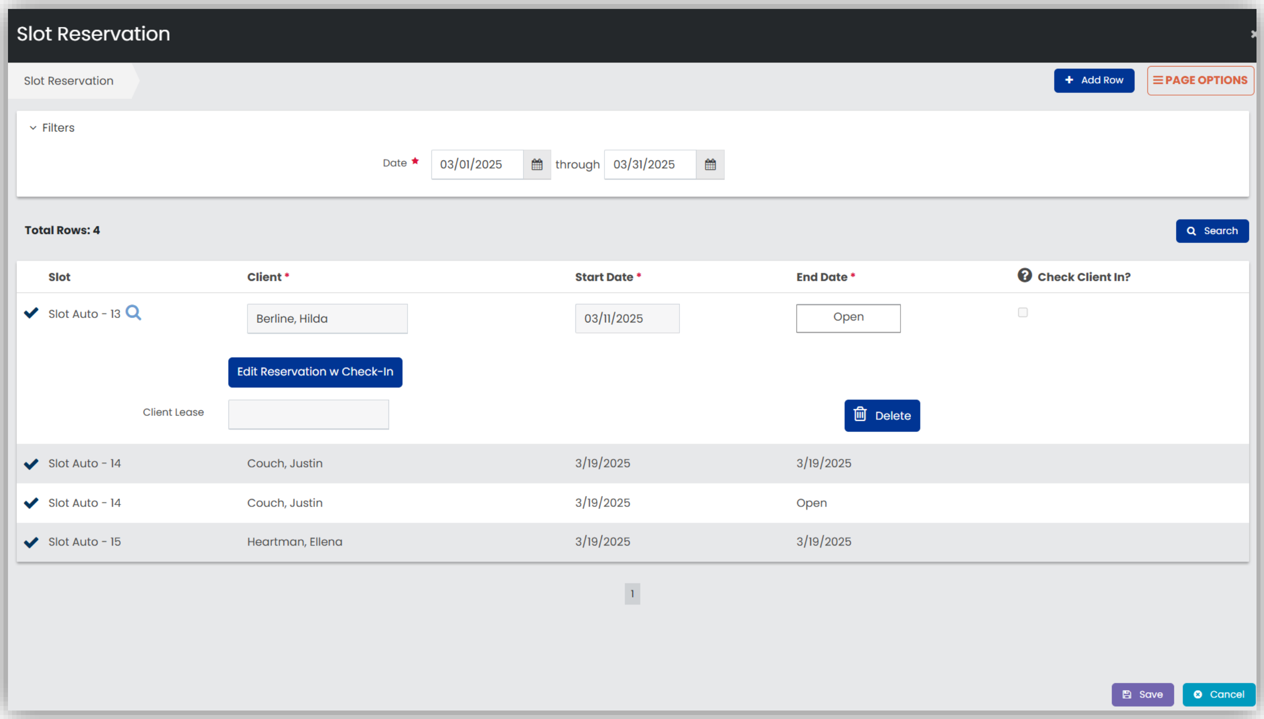
Use the information icon in the top right corner to open an additional window. There are three tabs that provide details about Client reservations, check ins, and absences. Use the checkmark and X icons to add and remove the Client accordingly.



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.



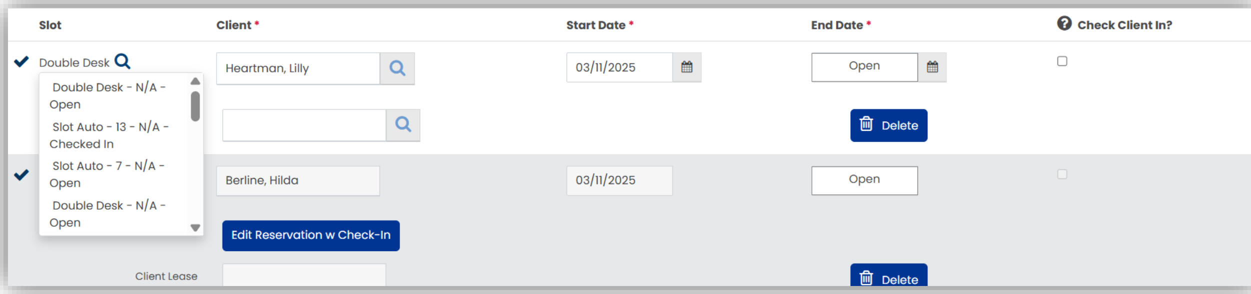
At the top of the form, the dates default to the current month. To view current reservations for the Usage, select the appropriate date range and click SEARCH.

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.

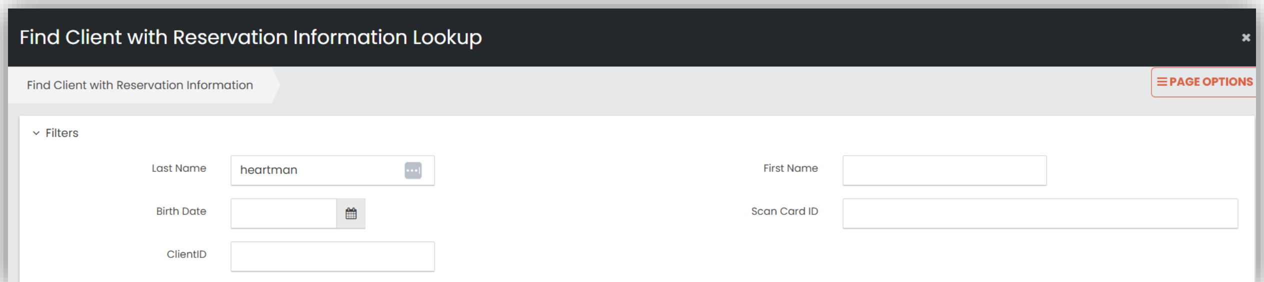
Select ADD ROW to create a new reservation.

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

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

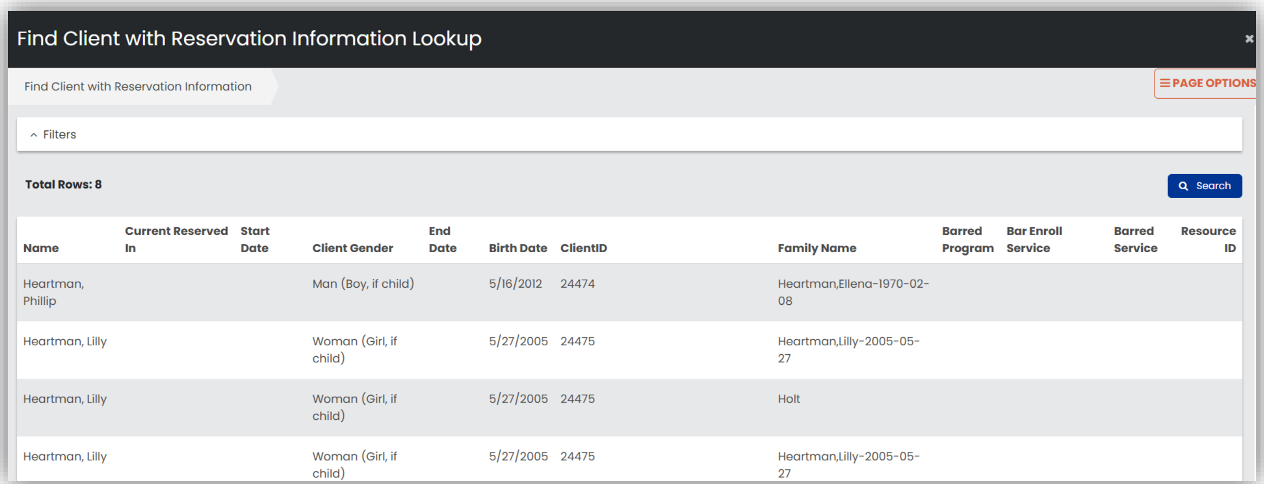


Then, click the lookup icon to search for the Client. You can search by last name, first name, birthdate, scan card ID, or Client ID.



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

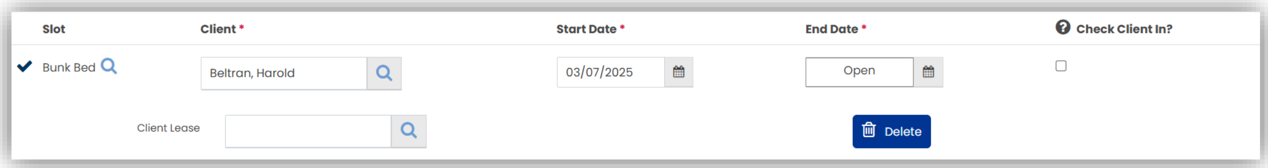
The list includes the Client name, if the Client already has a reservation, and if so, where, and when.



The 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 **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.

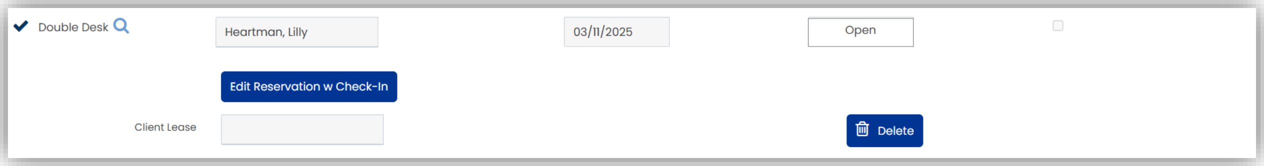
When entering reservations, the system will validate if the Client is allowed access to the Usage based on the Client's record and on the Usage's configuration. If they are not allowed, a message will display explaining the reasoning that prevents the reservations from being completed.

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.

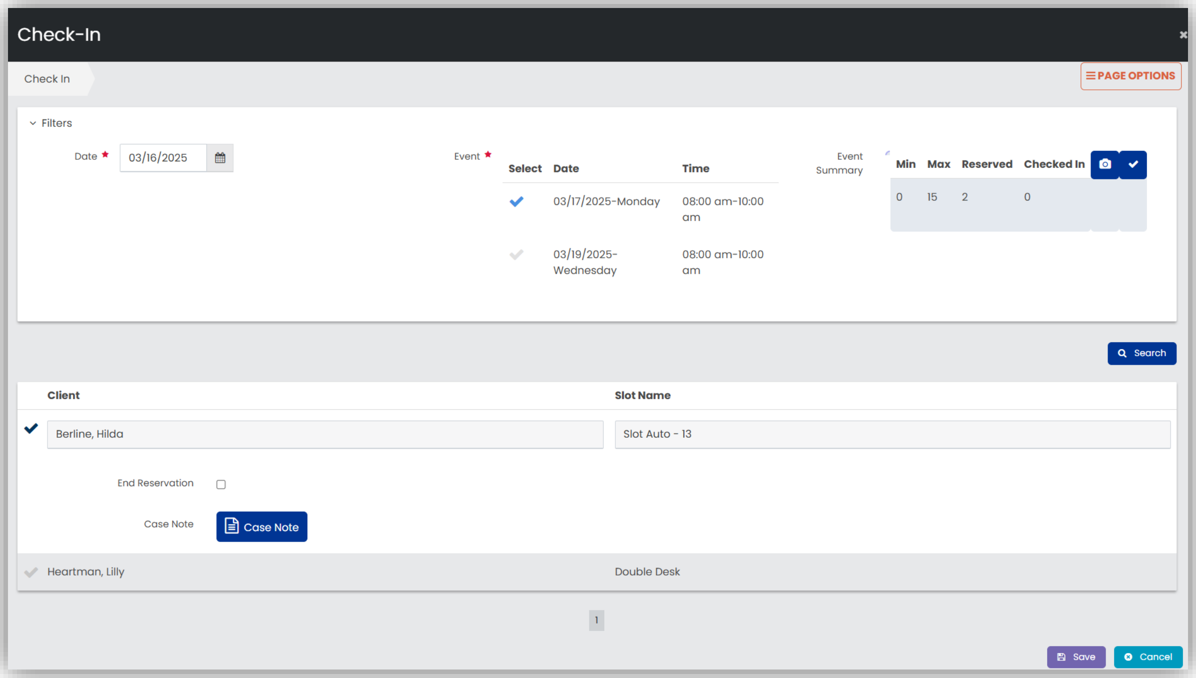
DELETE allows you to permanently remove the reservation, and all associated services, from the system.

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.



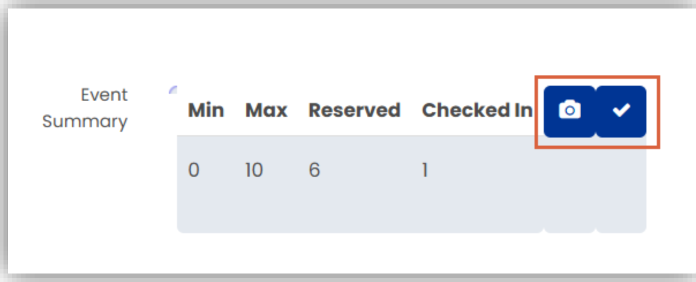
The *Check-In* form allows you to view a list of all reserved Clients for a selected date.

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.

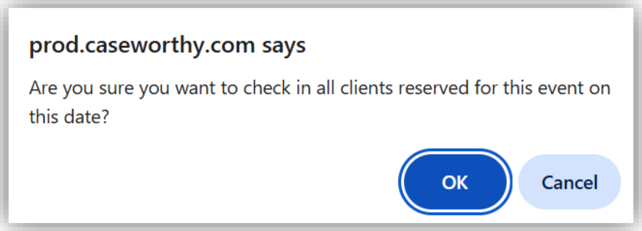
There are a couple of options for checking in any remaining reservations on this form.



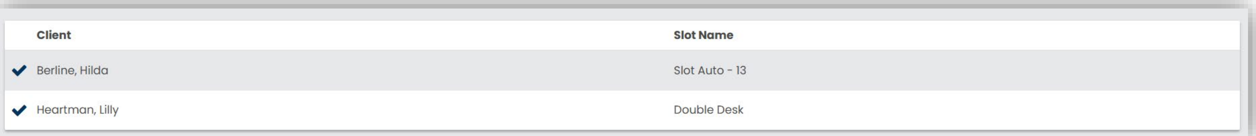
In the top right corner, the camera icon can be used to check Client's in using scan cards. This will only work for single-service Usages.

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

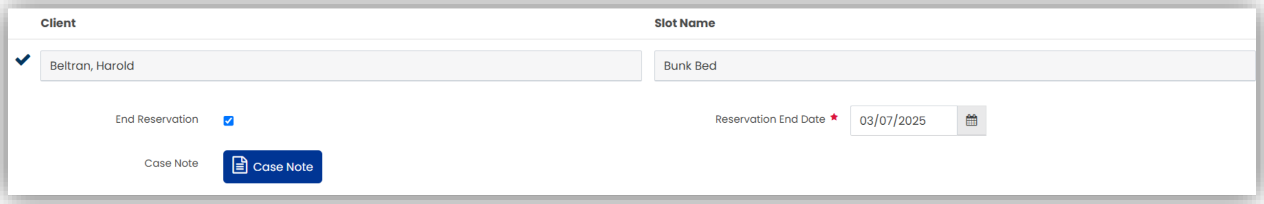
- A message displays prompting you to confirm the action.



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



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.

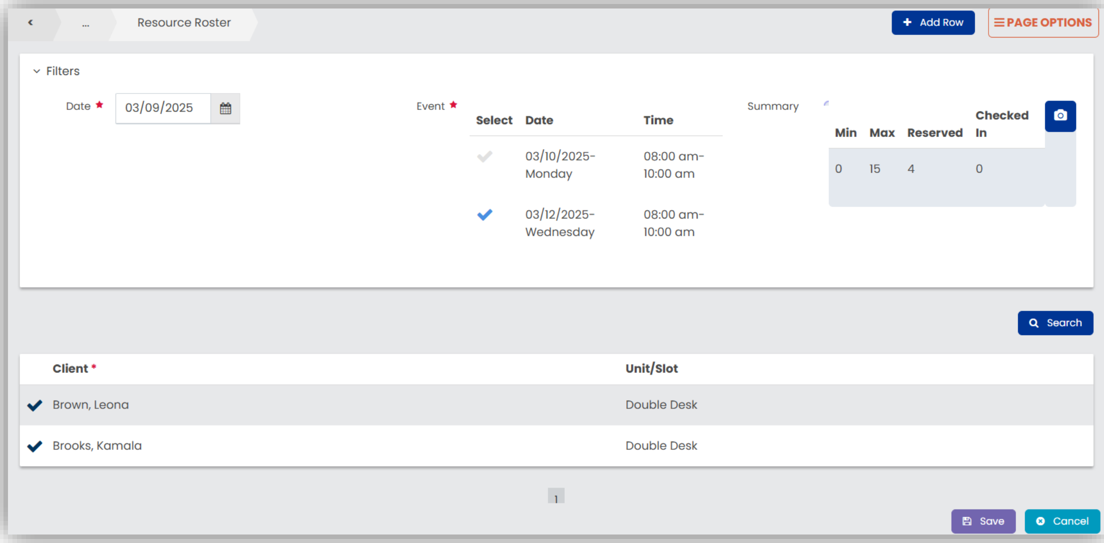
A CASE NOTE can be added to the reservation too.

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 similar to the Check-In menu option, but there are some notable differences.

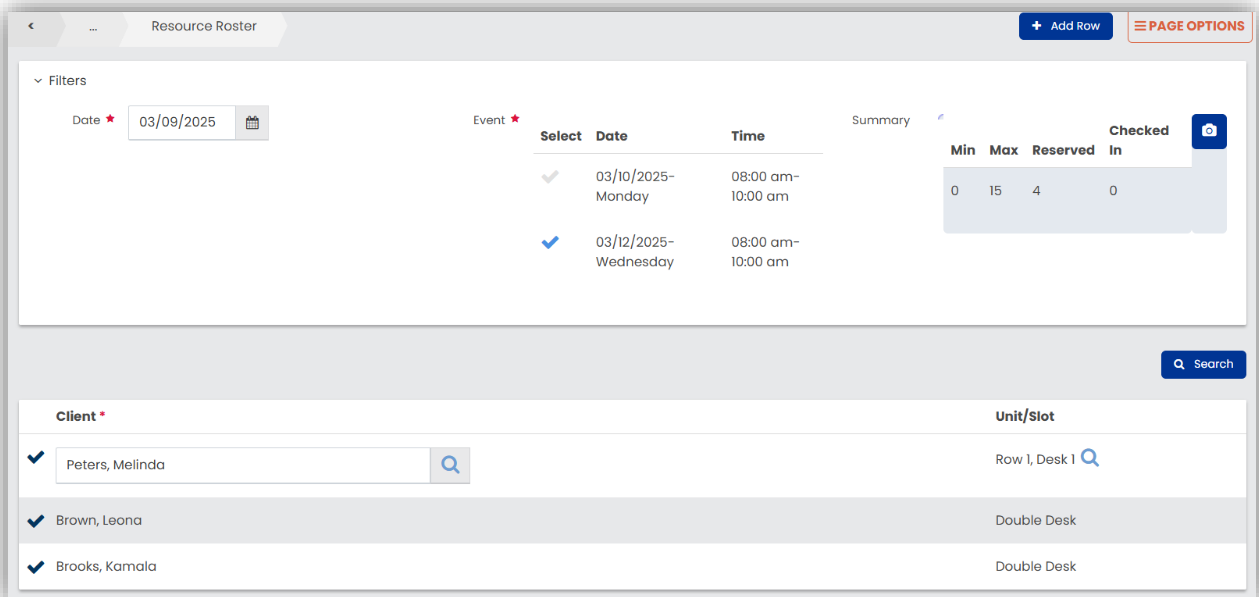
- This form displays Clients with reservations that have not yet checked in.
- You can add new reservations on this form.
- You can check-in Clients with scan card functionality only.
- You can edit each reservation listed, including the Client's name and the slot.



Choose the appropriate date and select SEARCH.

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

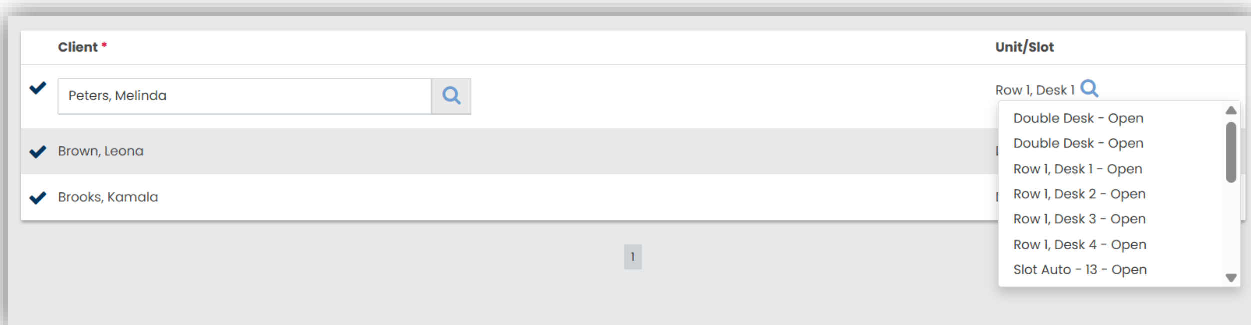
Use ADD ROW to record a new reservation.



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.



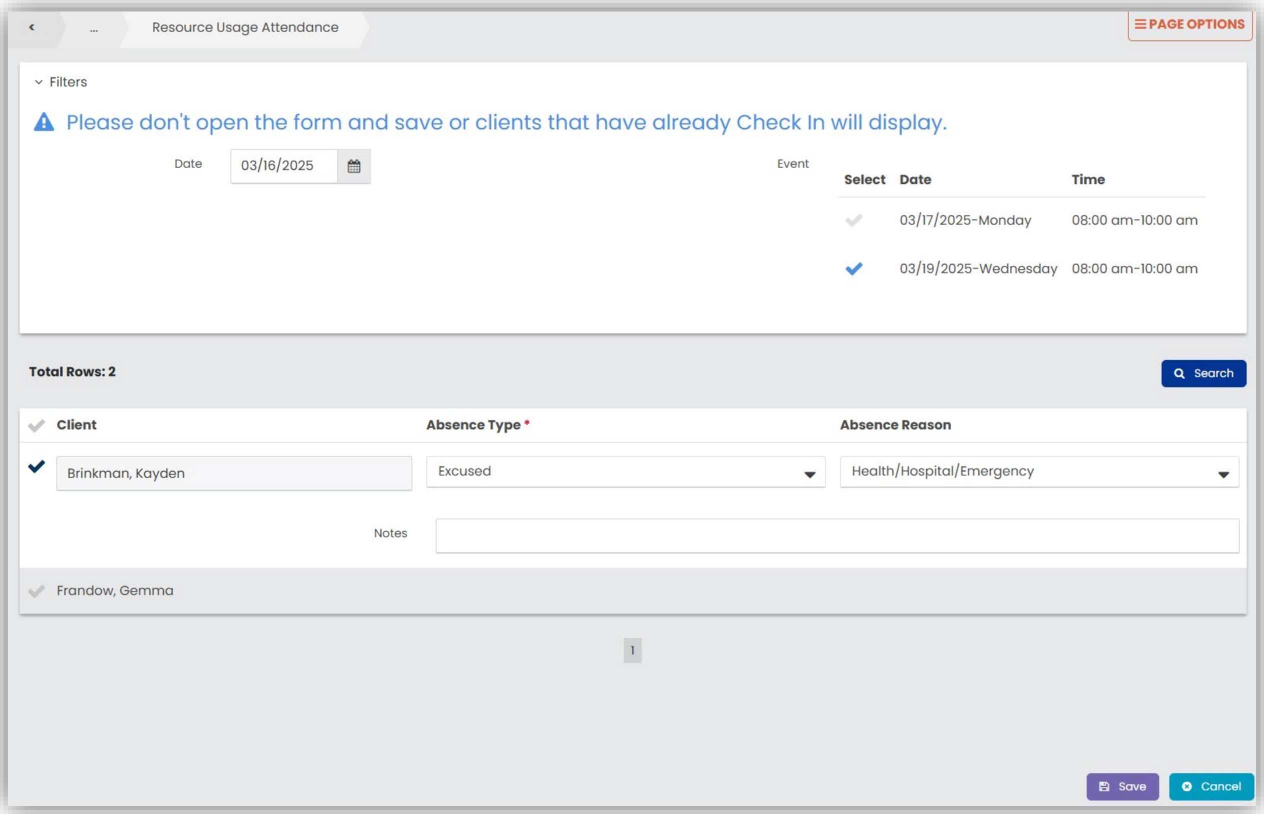
You can continue to edit each reservation on this form until the Client is checked in.

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.



Select the date of the class.

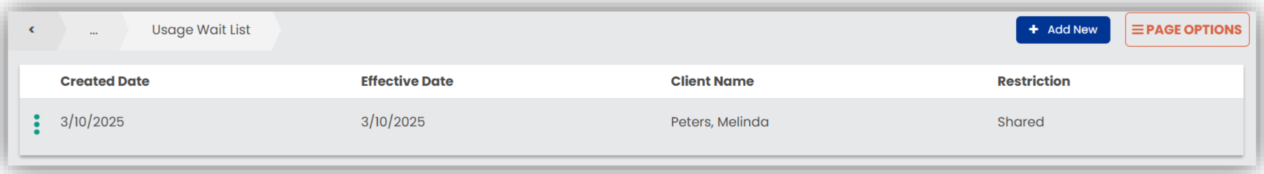
Select the Client to choose an **Absence Type** and a **Reason**.

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.

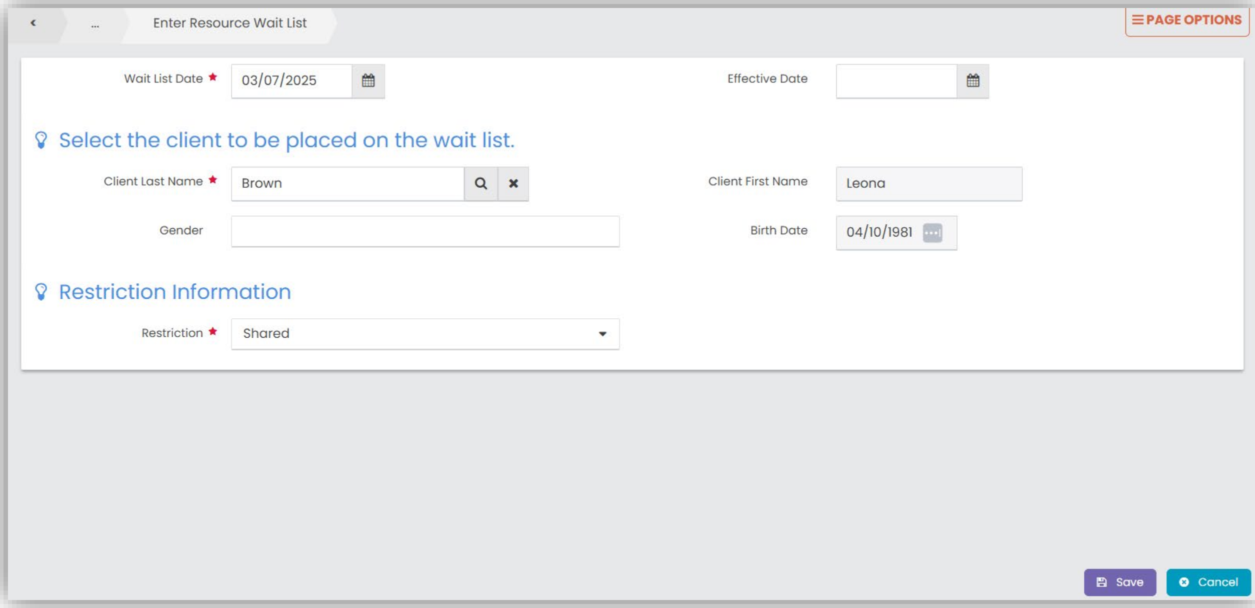


For example, if all seats are reserved for the month of December and you would like to maintain a record of Clients that would like to take over the reservation if one becomes available. This is used for reference purposes only and does not work with other functionality.

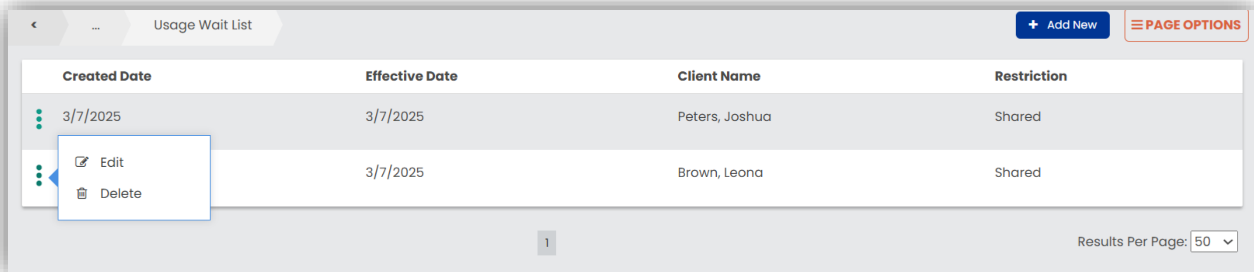
Use ADD NEW to include a Client on the waitlist.

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

Select SAVE when done.



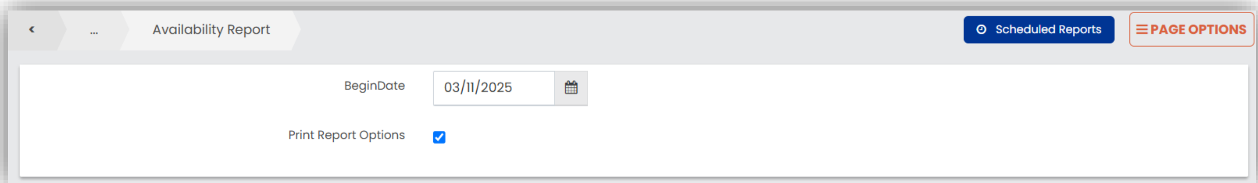
From the record's menu, select Edit to update the details of the request, or use Delete to remove the Client from the waiting list.



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.

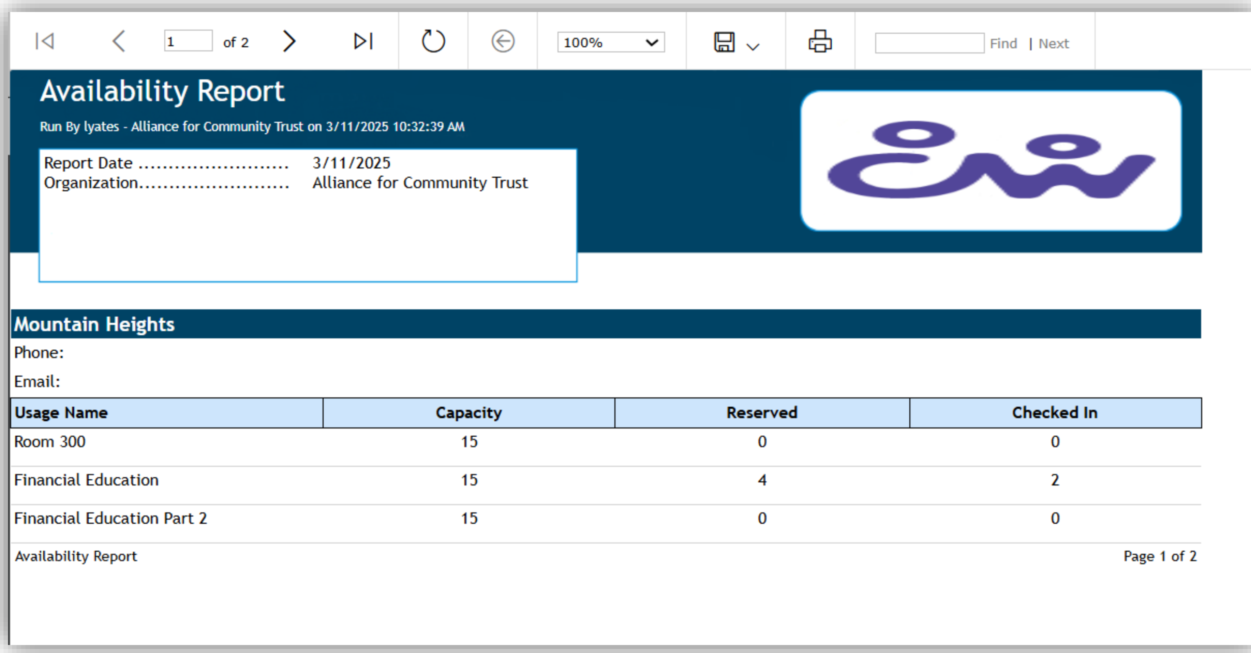
All the reports can be scheduled to automatically generate and to email to selected Users recurring on a set date and time.



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.

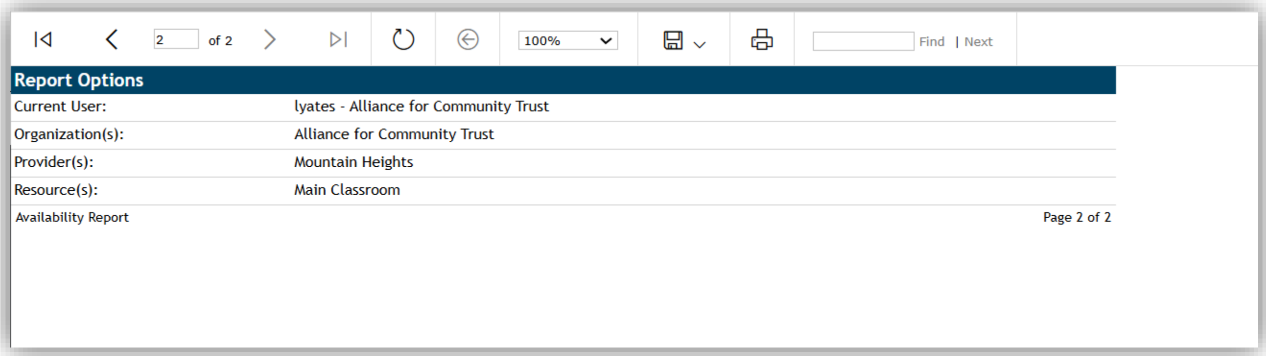
Select REPORT to run the report.



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.

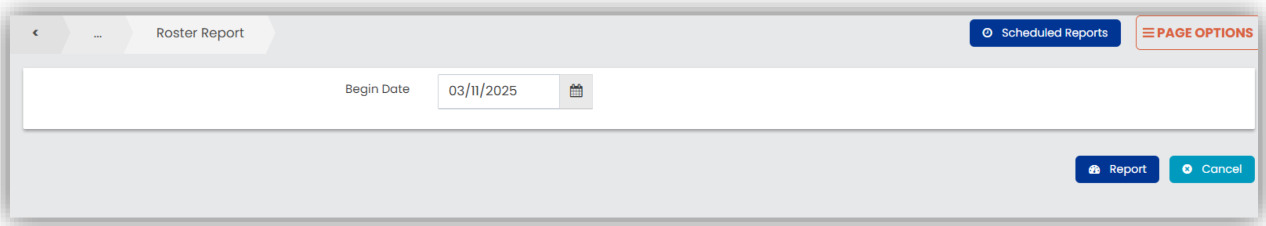
The second page displays the report options, including the current User, as well as the selected Organization, Provider, Resource, and Usage.



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

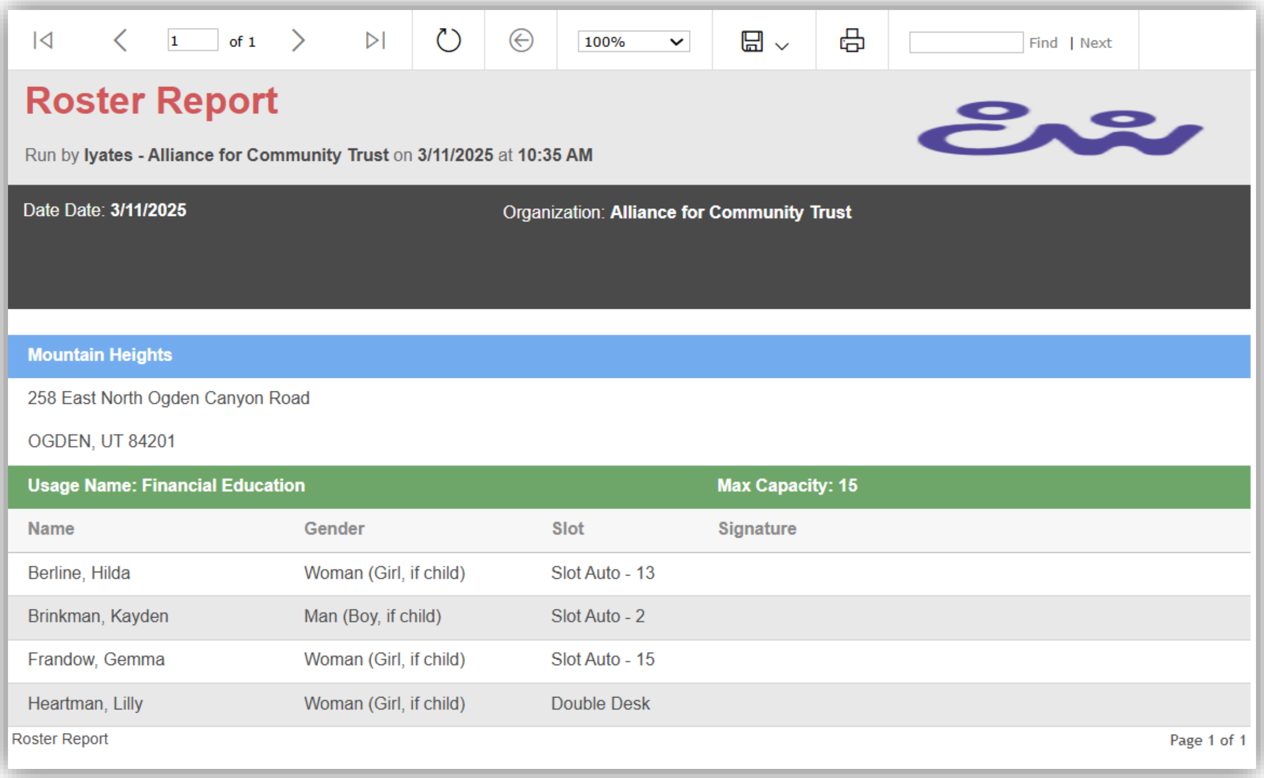
Check-In Roster Report

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.


1 of 1 100% Find | Next

Roster Report

Run by **lyates - 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.

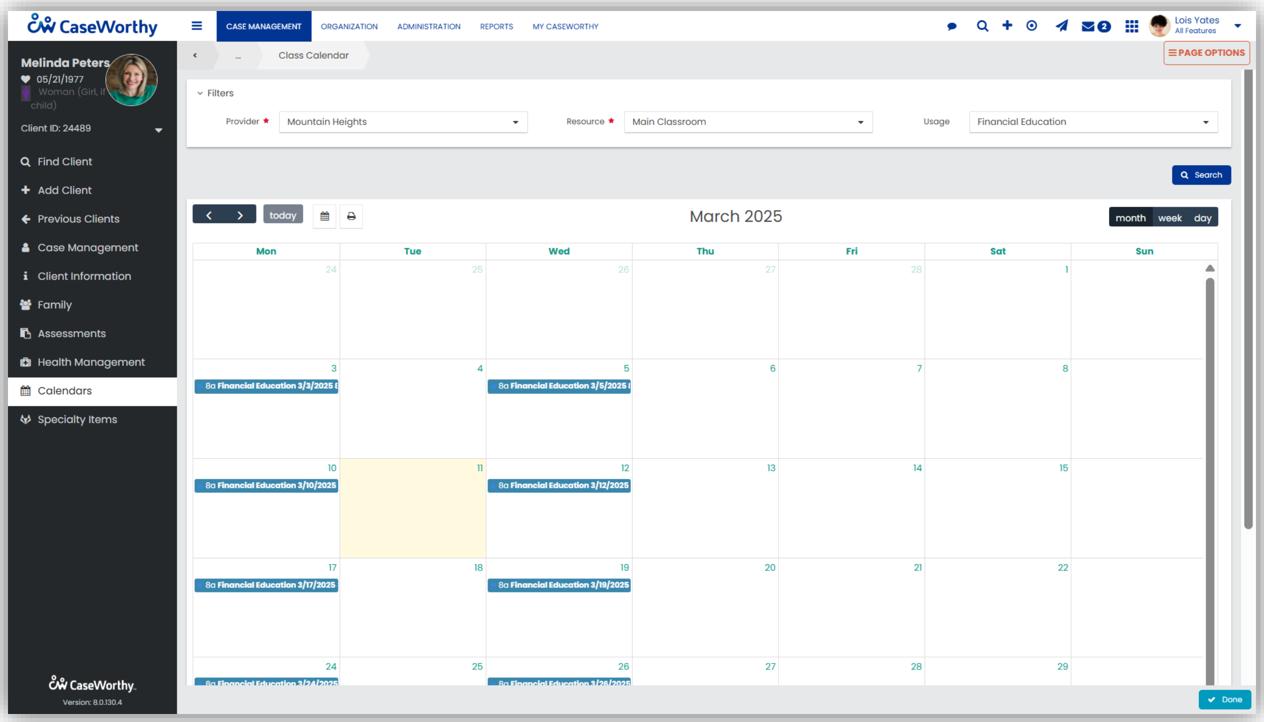
Class Calendar

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

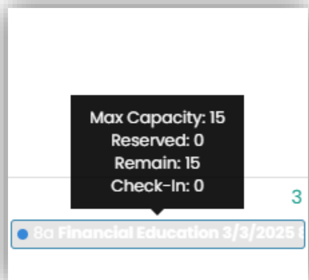
The *Class Calendar* form displays.

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

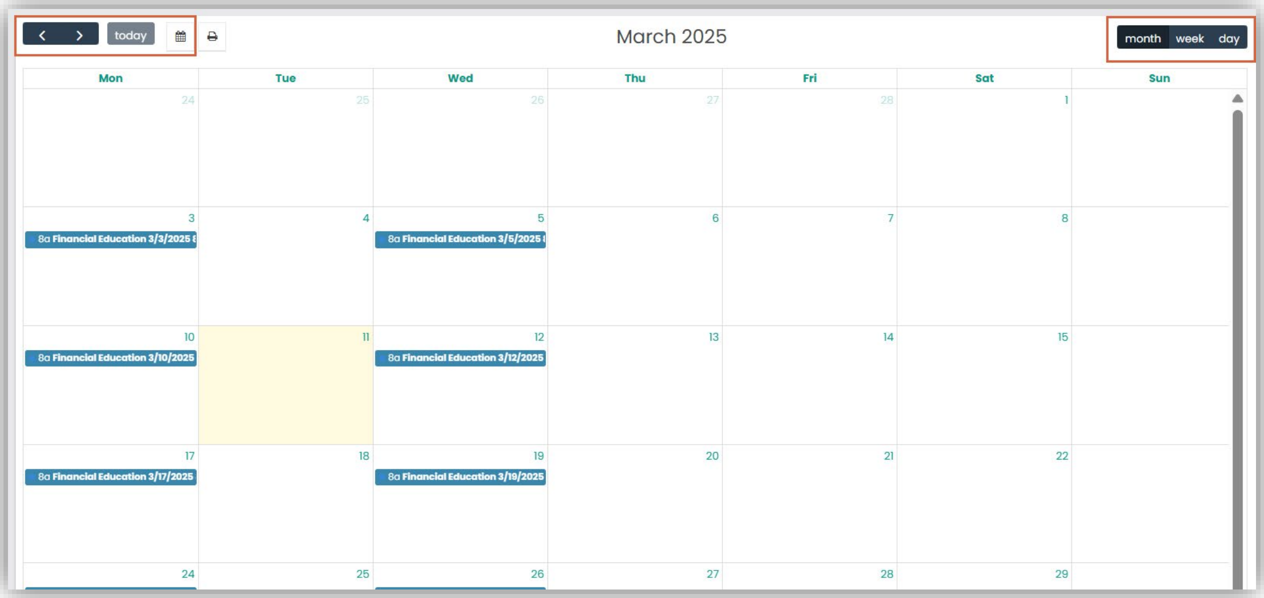


All available classes display according to their set schedule. For example, Financial Education on Mondays and Wednesdays at 8:00 a.m.

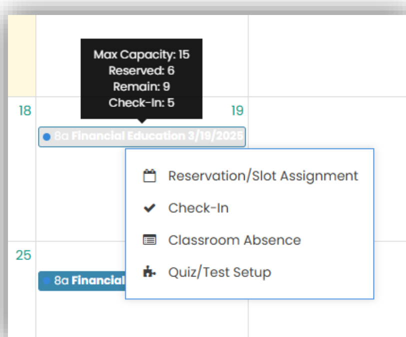
Hovering over a class displays its maximum capacity, number of seats reserved, remaining spots, and number of Clients already checked in.



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.

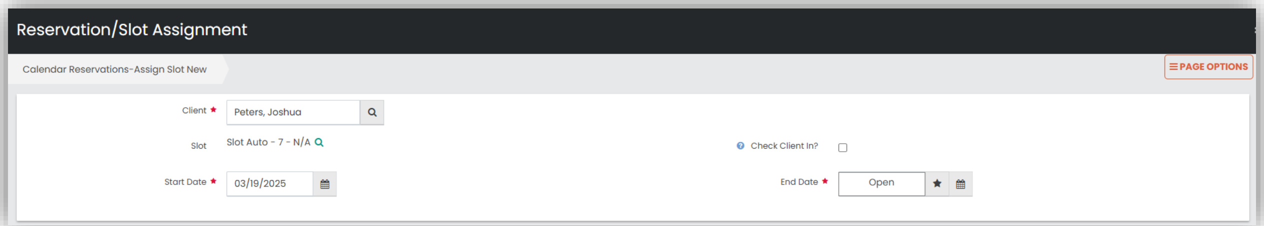


Select a class to display additional options.



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.



Select the Client.

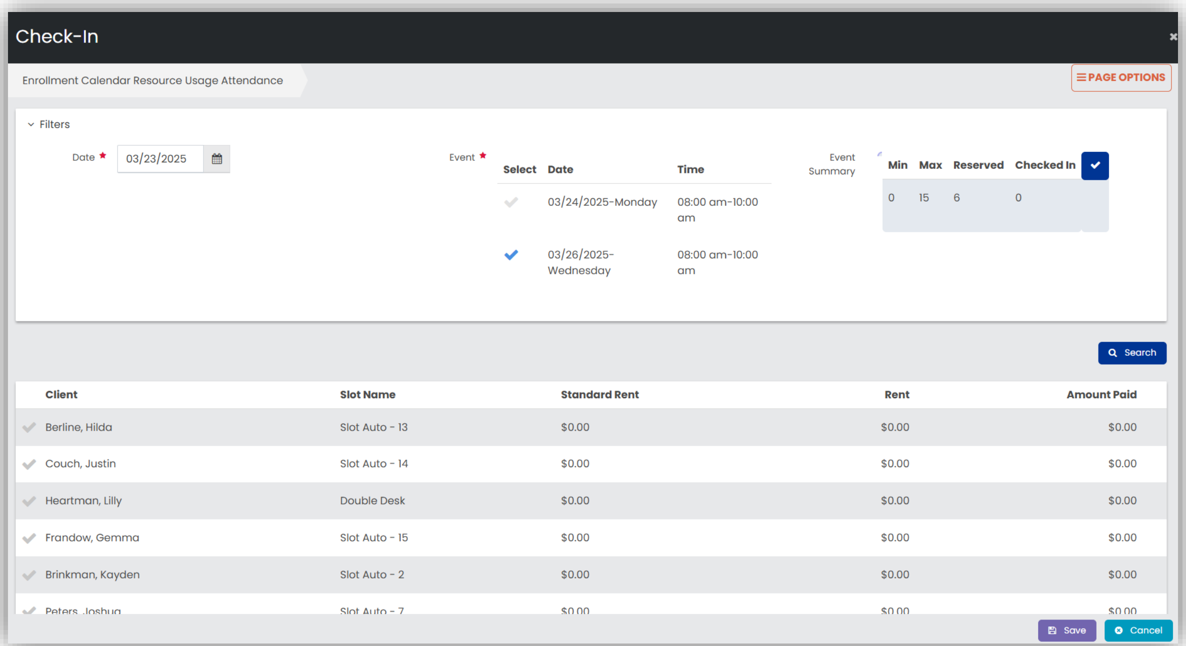
Then, select an available slot.

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.



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.

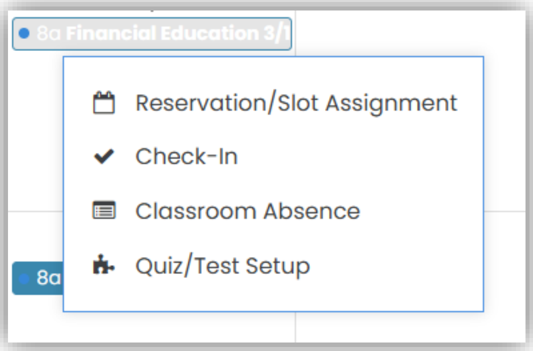
The *Check-in Reservations* form is used to check a Client in to the reservation as well but also includes options to mark if the Client was tardy or left class early.

This option will display only if the following is true:

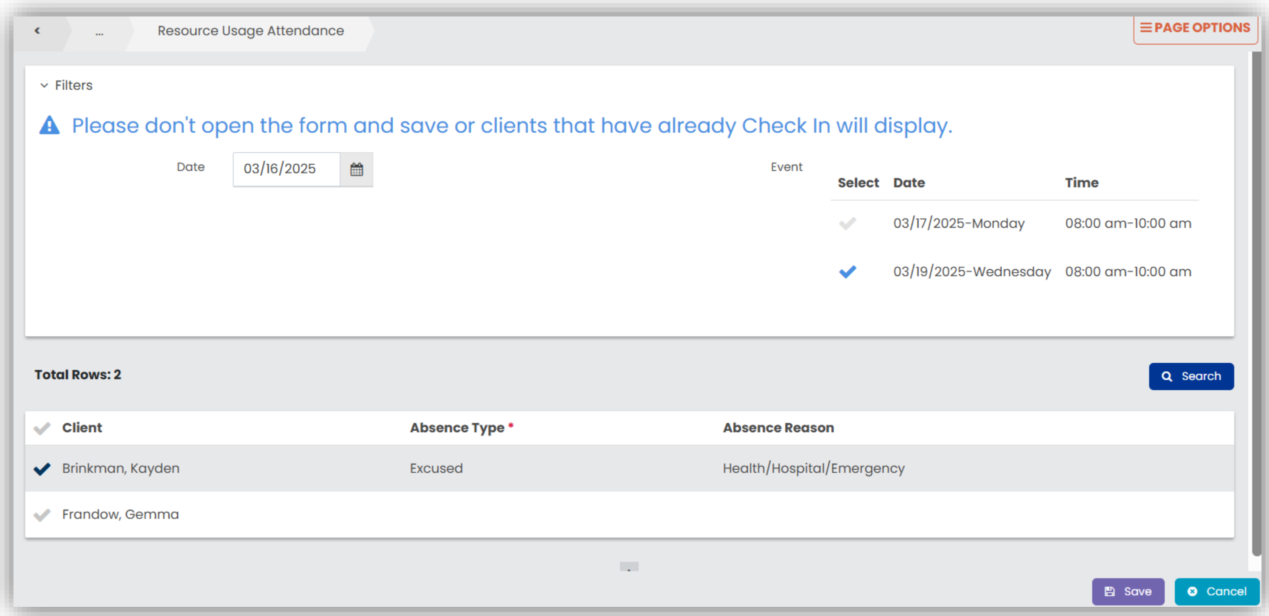
- The Resource is configured to create slots during check-in.
- The Usage is set to:
  - assign slots at check in.
  - only provide a single attendance service.

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

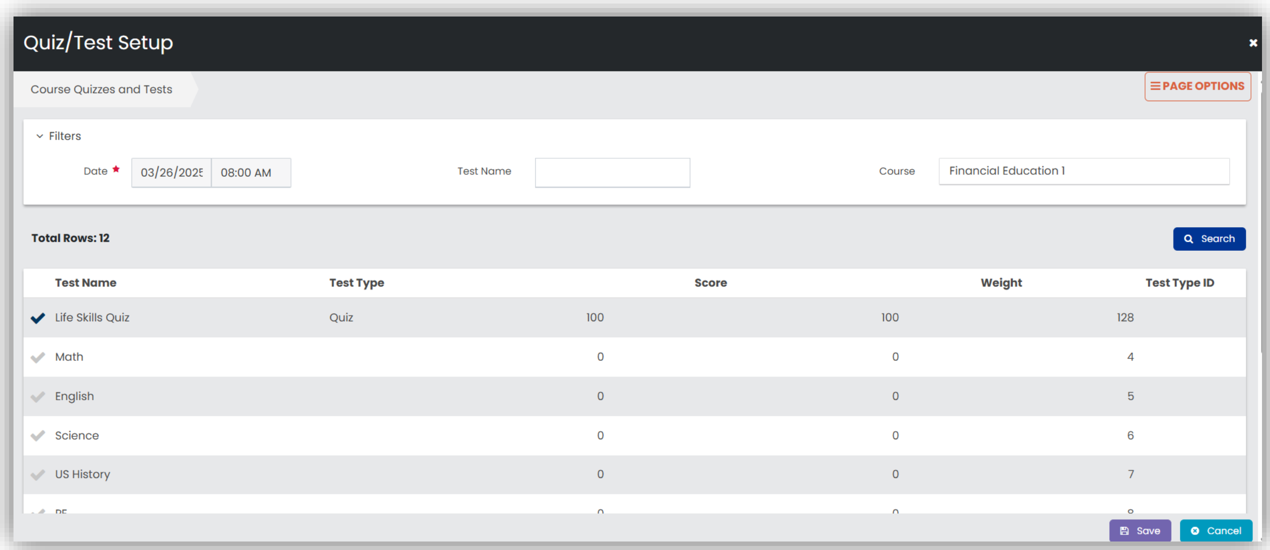
The next option is Classroom Absence, which is the Absence form also found on the Provider's menu.



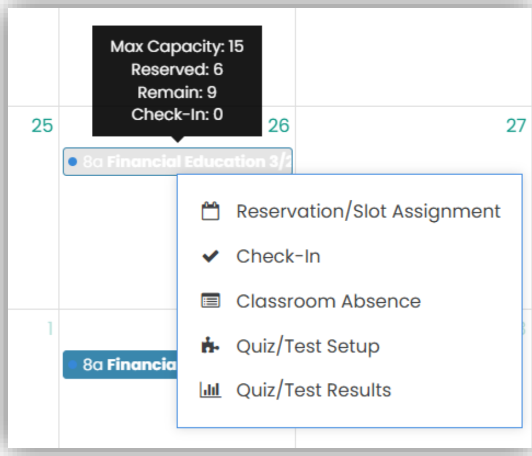
The *Resource/Usage Attendance* form allows you to mark a Client absent from a reservation, as well as view a list of Clients that were previously noted as absent. This form will only display Clients who are not yet checked in.



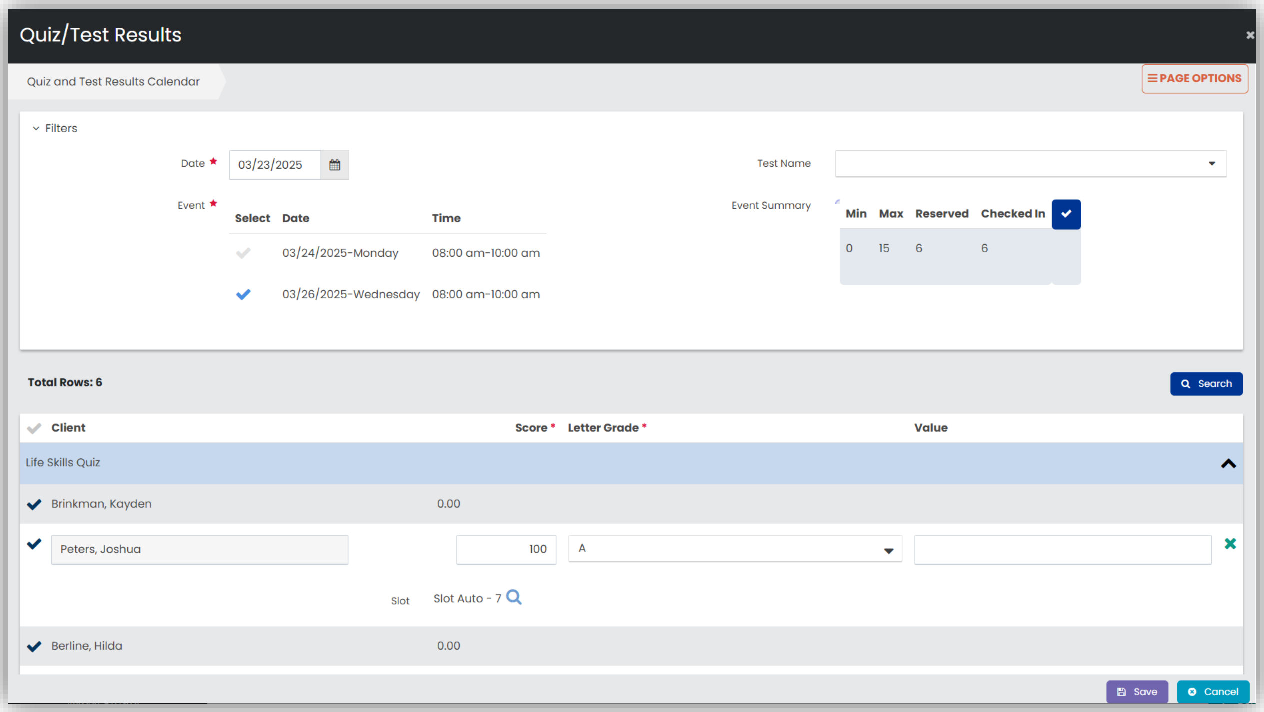
Quiz/Test Setup is used to indicate that a test or quiz is offered for the selected date, and to add details about the test or quiz. Tests that are available on the form are managed in Codes and Categories.



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.



Enter a score and letter grade for each Client.

When done, SAVE the form.

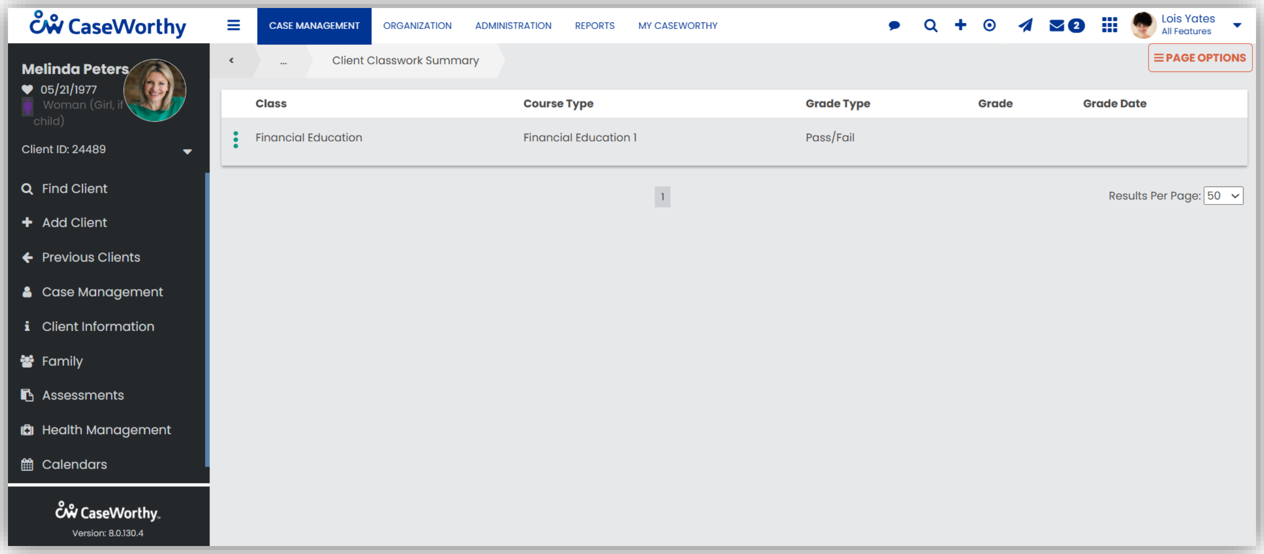
Classwork

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.



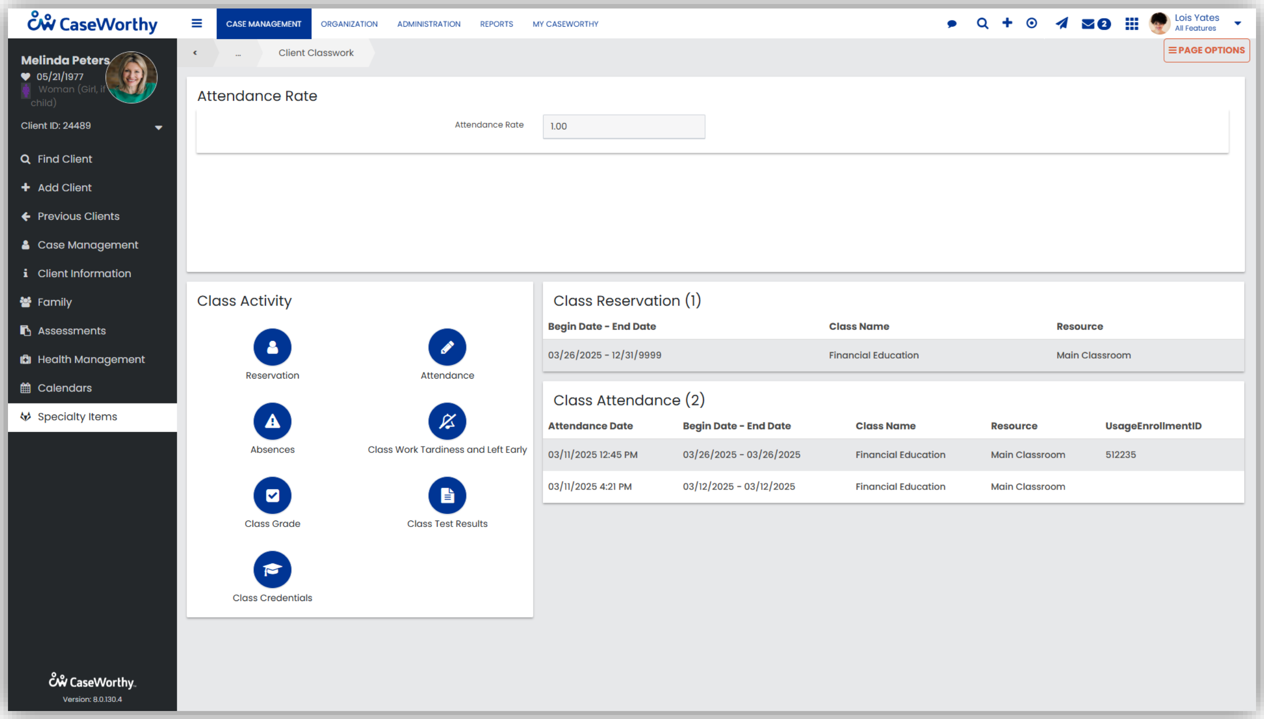
For a course to display, the Client must have a reservation, and the class Usage must have a course selected.

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.

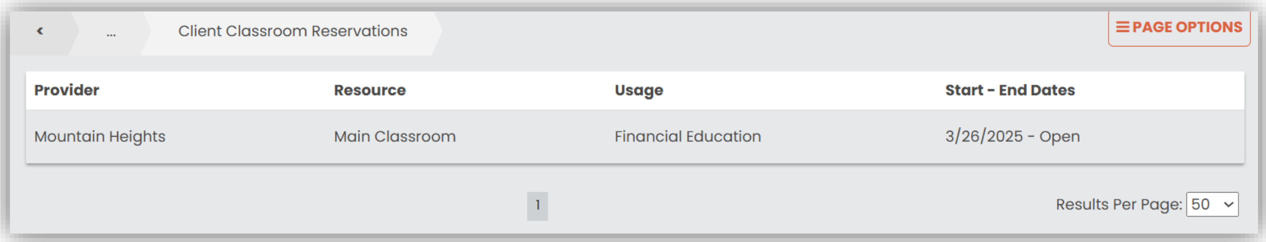


Attendance Rate

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%.

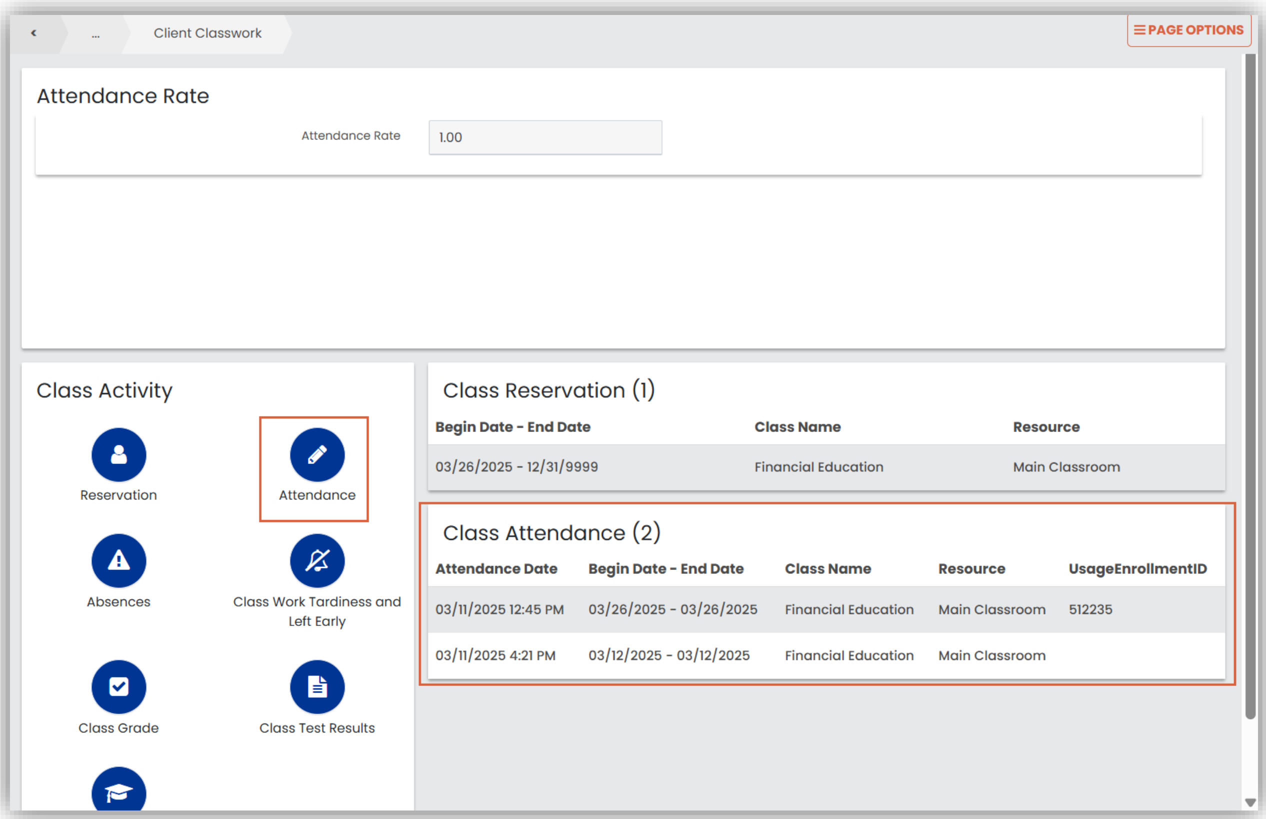
Class Reservation

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



Class Attendance

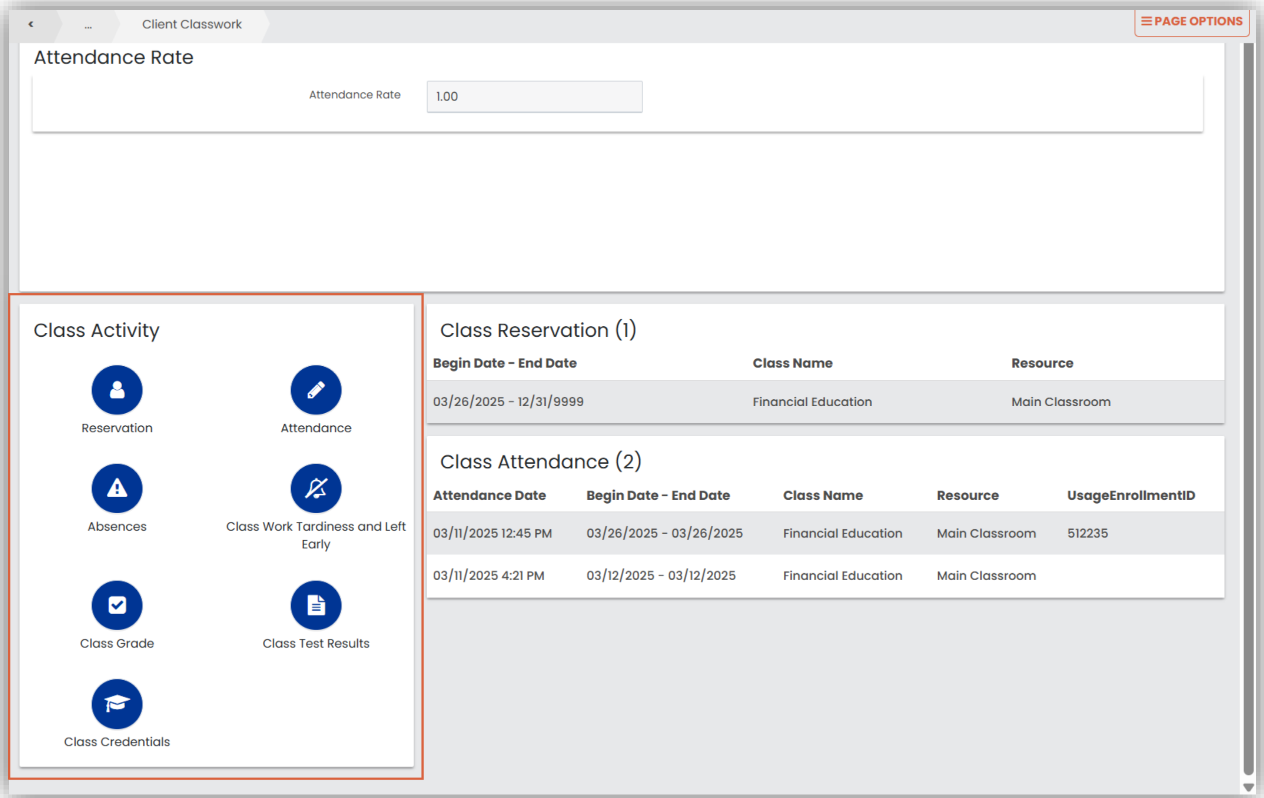
The Class Attendance query widget displays the history of the Client's attendance for the current class and will include the most recent five check-ins.



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

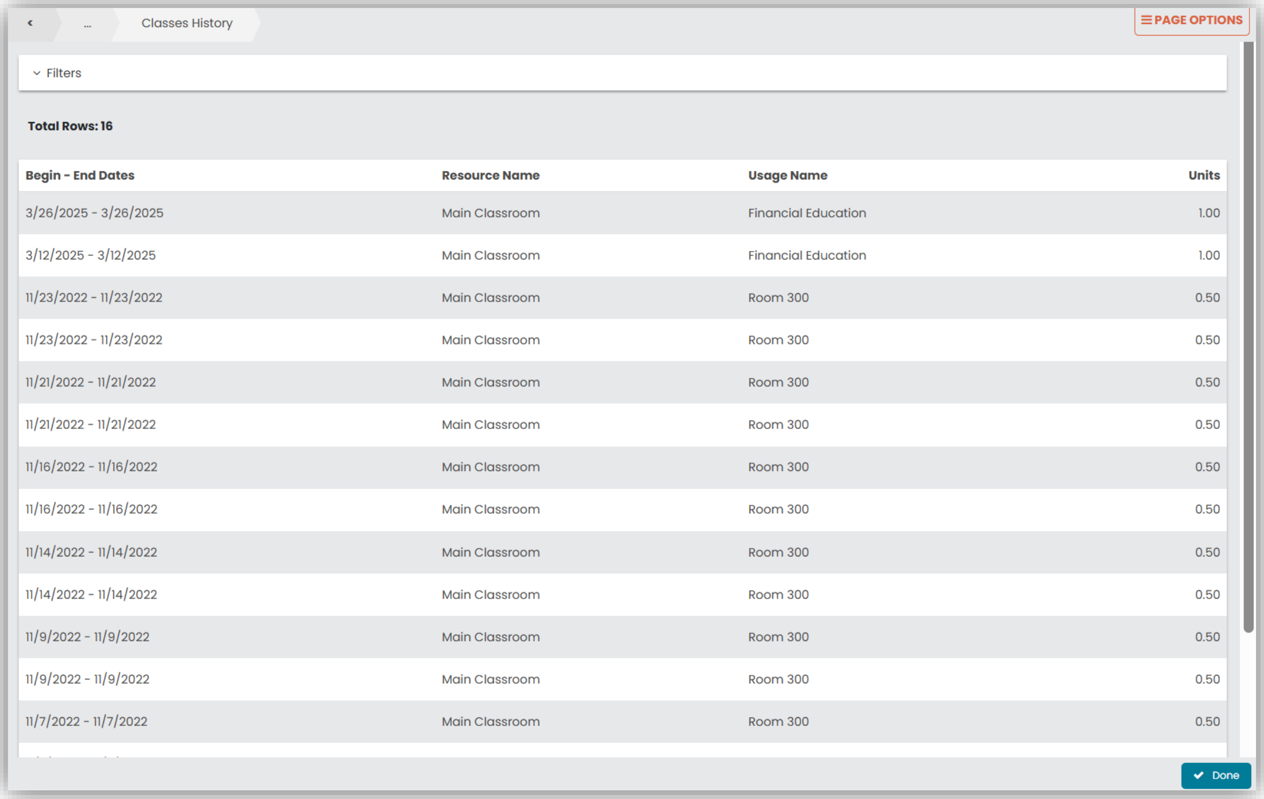
The Class Activity menu links allows you to review details about the Client's progress in classes for which they have reservations.



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

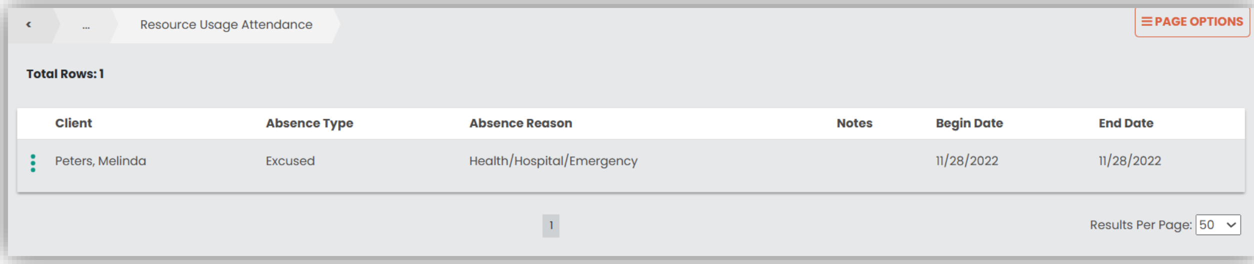
Attendance displays a historical record of all the classes the Client has checked in to, including the date, the class location, and the number of service units posted.

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



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.

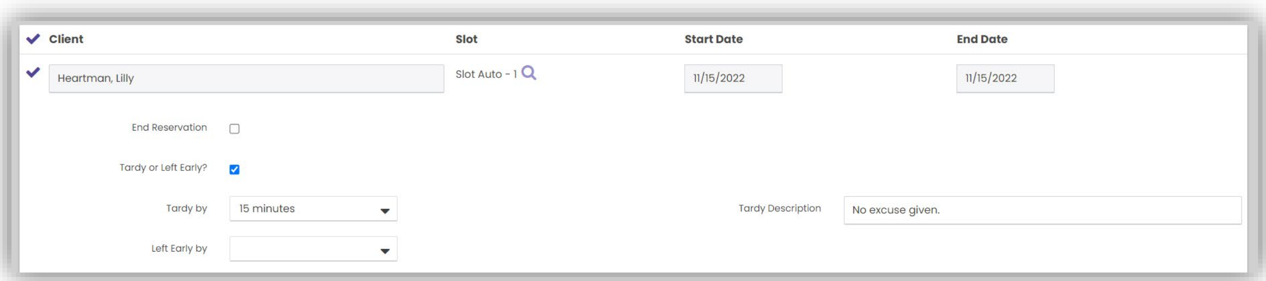


Client	Absence Type	Absence Reason	Notes	Begin Date	End Date
Peters, Melinda	Excused	Health/Hospital/Emergency		11/28/2022	11/28/2022

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

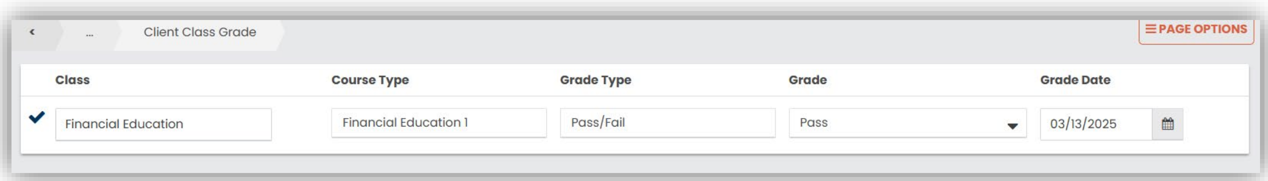
Class Work Tardiness and Left Early displays a record of each time the Client was marked as tardy or left class early. This feature is only available for Usages that record multiple services.

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.



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.



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", "DD, etc.

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

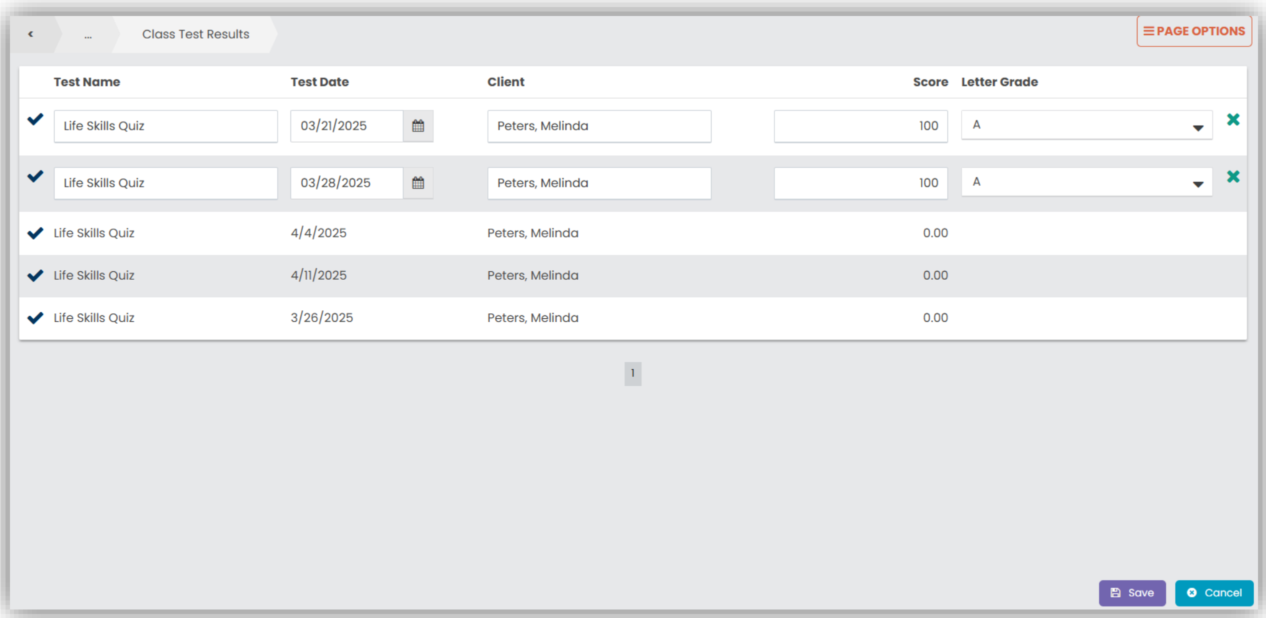
Lastly, enter the date the grade was recorded.

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.



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	

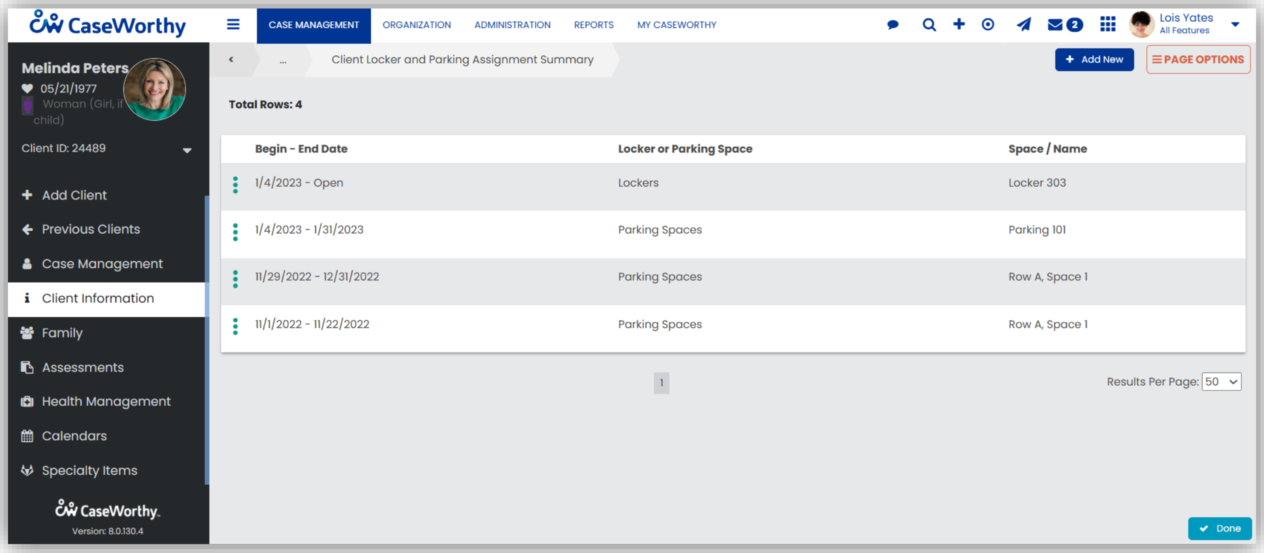
Skills and credentials are posted to the Client's record through a nightly batch process. Once posted, the skills and credentials are displayed on this form, as well as viewable on the *Employment & Retention* Dashboard.

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

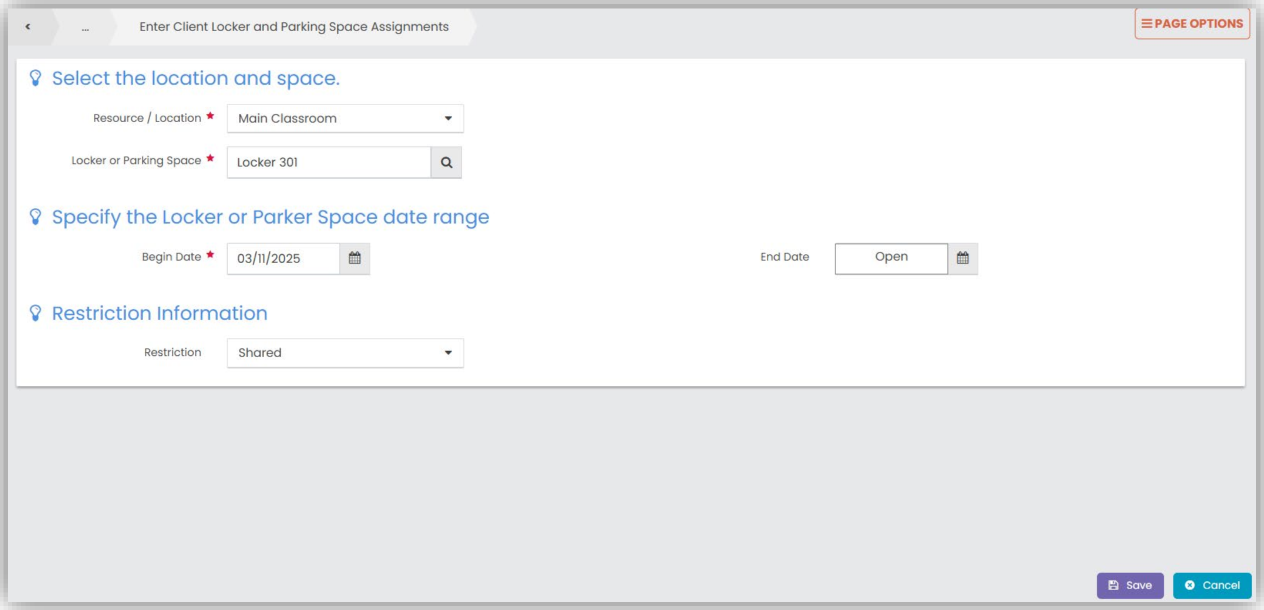
During Resource setup, lockers and parking spaces were added. Every Provider Resource can include these amenities, which are then assigned to Client's individually on the Case Management tab.

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



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

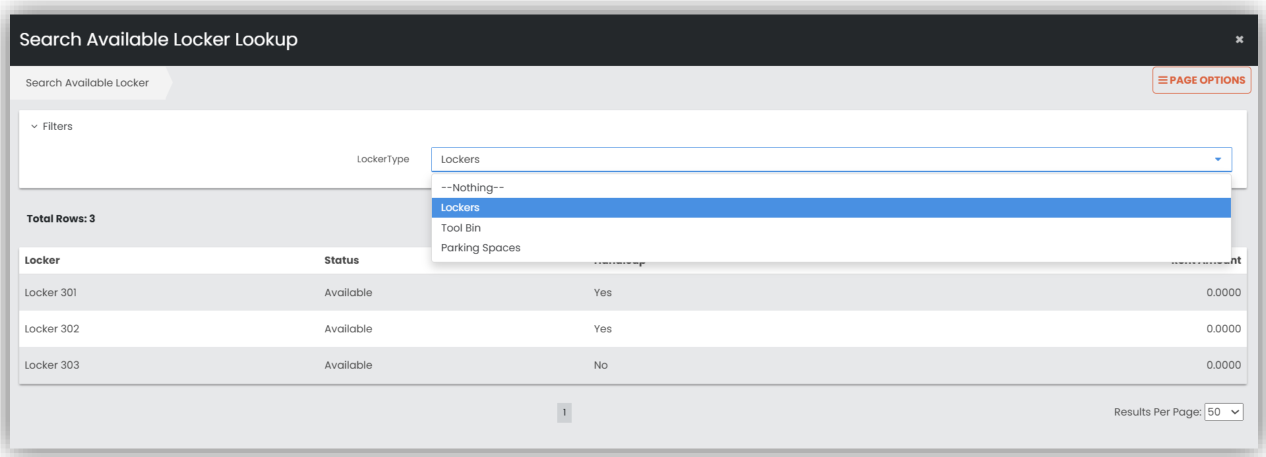
Select ADD NEW to add a new locker or parking space assignment.



Start by selecting the **Resource**.

All the Provider's Resources are listed.

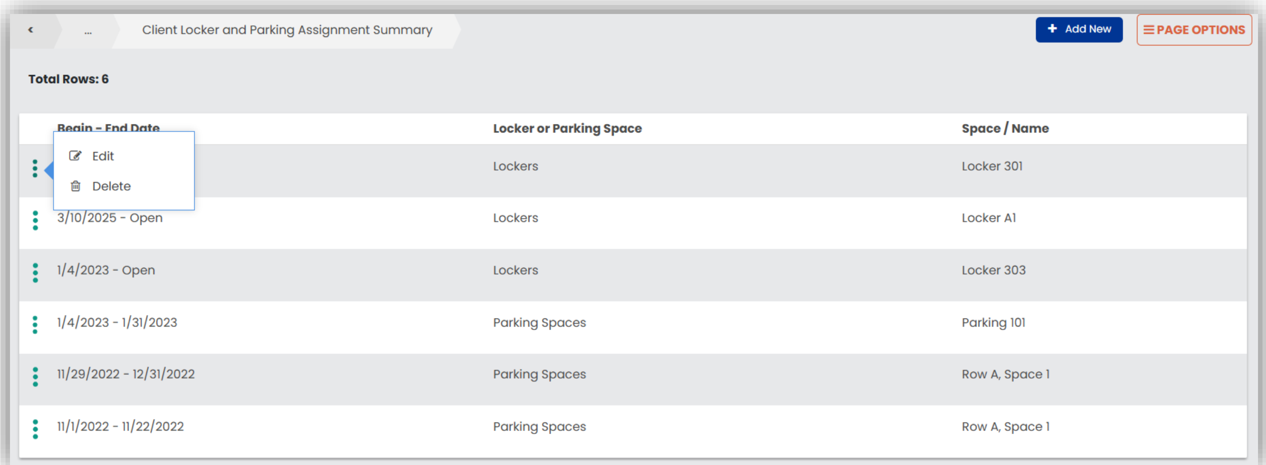
Click the lookup icon to select from a list of available lockers or parking spaces for the selected Resource. The search form defaults to available "Lockers" but can also be changed to view a list of available "Parking Spaces".



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.

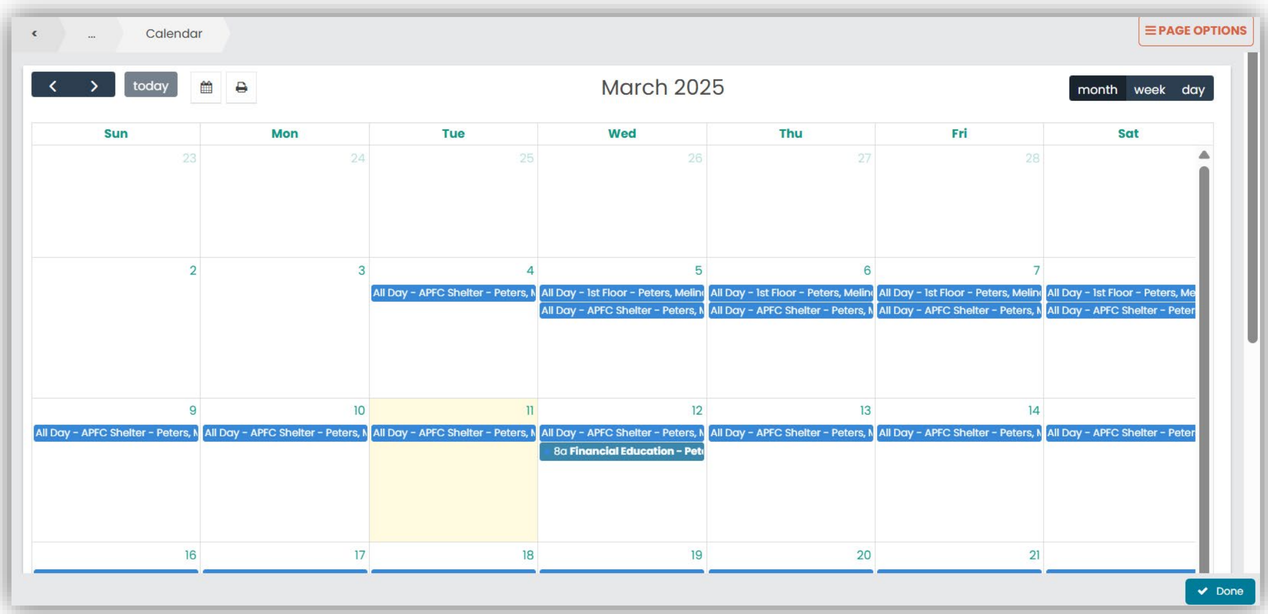
Each assignment can also be edited or deleted off the record's menu.



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.

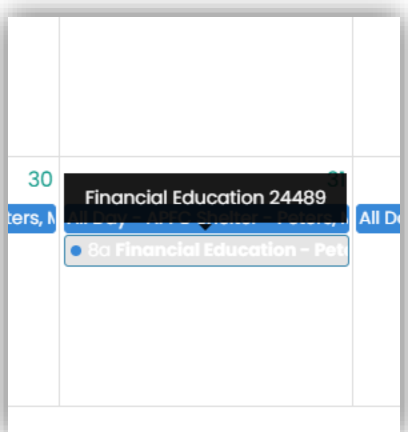
Navigation Case Management tab: Case Management > Client Calendar



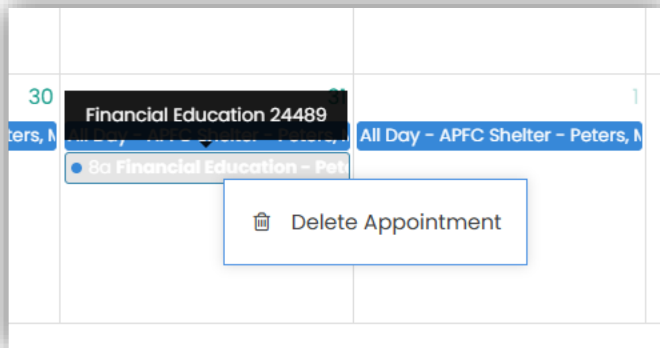
The calendar displays the current month by default. The view can be changed by using the options at the top.

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.



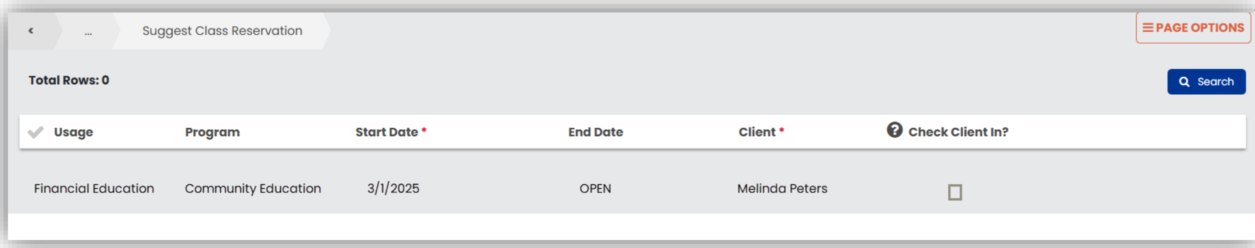
Or click the appointment and select Delete to remove the appointment or reservation from the Client's calendar.



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



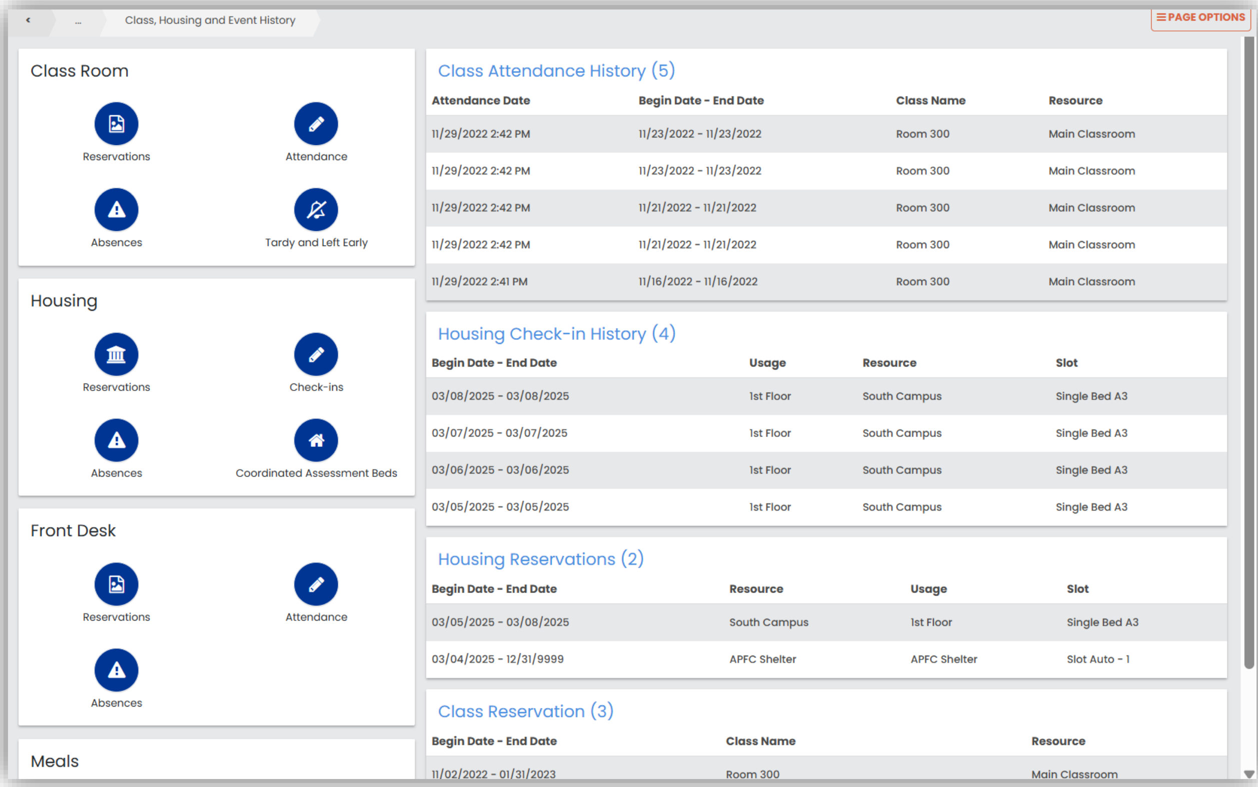
The Client can be reserved and checked in directly on this form.

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.



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	A healthcare setting where medical or mental health services are provided to Clients. Health Management Functionality	Scheduling medical appointments, tracking health services, and recording treatment plans.	No	No calendar	No	No