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System Overview

MyAdptionPortal.com (**MAP** for short) has 21 modules designed to support adoption agencies and attorneys. These modules include managing the core data through assigning tasks and reporting. The modules were designed to work either standalone or together to provide a rich environment for the adoption agency or attorney and their clients to work on.

MyAdoptionPortal.com is an Internet-based product, which is hosted and maintained by CAIRS SOLUTIONS LLC.

MyAdoptionPortal Modules

MyAdoptionPortal.com is comprised of over 21 feature-rich modules that allow adoption agency or attorney the ability to create a fully customized and efficient environment to support their business and clients.

Core Case Data Module

The core data management module in MAP, manages all the information about the adoptive family or birthparents, their relationships, case notes, and other associated data.

Adoptive Family Portal

The adoptive family portal allows adoptive families to login into MAP and perform adoption related tasks such as filling out online forms, digitally signing documents, making a payments, registering for an event, downloading documents, uploading documents, taking surveys, messaging, and other tasks associated with the adoption process.

Birth Parent Portal

The birth parent portal like the adoptive family portal allows the birth parent to log into MAP and enter information into the system, take surveys, sign up for events upload and download documents, and message with their caseworker.

Process Module

The process module provides the ability for the adoption agency or attorney to customize the tasks the adoptive family or birth parent performs in the system. Tasks can be grouped and organized into phases. The type of tasks include:

- Filling out a form
- Digitally signing documents on-line
- Taking a survey
- Uploading or downloading documents

- Registering for an event
- Redirecting to another webpage
- Generating documents
- Declaring Reference

Document Merging Module

The document-merging capability allows the creation of documents with data that has been merged into the document. Documents such as government related forms can be mapped and created on the fly by the document merge module.

Casenote Module

The case worker records all relevant client information not covered elsewhere, in case notes, including conversation details, appointment schedules, observations regarding possible attributes of an adoptive couple or Birth Parent or health and emotional well-being of a child and the priority and intensity of services that may be required.

Messaging Module

The messaging module provides internal secure communication within the MAP system for adoptive families, birthparents, and caseworkers. All communications between adoptive parents and caseworkers or birthparents and caseworkers is recorded in case notes automatically.

Electronic Forms Module

The electronic forms module provides the ability to create custom multipage electronic forms that can be used to have the adoptive family or birth parents entered data directly in or by the caseworker to view and update data. Electronic forms module supports over 250 predefined fields and is capable of supporting an unlimited number of custom defined fields. Electronic forms can be single column, double column, multipage, and supports digital signing and acknowledgment.

Document Management Module

The document management module supports storing documents for adoptive families and birthparents. Documents can be uploaded into the document management module either by the adoptive family, birth parent, or caseworker. All documents uploaded to the system are connected to an individual or family in the system. Documents can be uploaded and made available to groups within MAP. All documents are classified through the use of a document tag categorization.

Caseworker Task Module

The caseworker task module is used to identify and track specific tasks that need to be completed by the caseworker to support adoptive family or birth parent. The caseworker is notified of tasks that are past due, due today, and due within the next several days. Tasks can be assigned sequentially or configured with predecessors.

Financial Module

The finance module tracks and manages the payments and expenses for an adoption including payments received from the adoptive family, invoicing to the adoptive family, and management of birthmother expenses. The finance module integrates with QuickBooks online and the standalone version of QuickBooks. The module is fully customizable for expenses and payments categorization.

Alerts Module

The alerts module monitors key dates (customer defined) in the client data and based on criteria will perform an action when the criteria are met. The alert module is capable of sending a individual message, message to a group or assigning tasks to caseworker.

Rules Module

The rules module allows the adoption agency or attorney to automate the specific tasks the adoptive family or birth parent must perform due to their situation or location. The rules module can support complex situations based on location, past relationships, county/state/federal requirements, and individual situations. The rules module plays a key role in calculating fees.

Fee Module

The fee module allows the agency or attorney to create both simple and complex fee structures/templates that can be applied or changed based on the situation of the adoptive family, the adoption situation, or birth parent requirements.

Resource Module

The resource module allows the adoption agency or attorney to post website links to users within the system. The module is useful for providing links to other informational websites based on the type of user in the system.

Payment Module

The payment module allows the adoption agency or attorney to receive payments from their clients online. The payments types supported are PayPal, credit cards through authorize.net, and CAIRS SOLUTIONS ECheck product.

Electronic Reference Module

The electronic reference module provides the adoption agency or attorney the ability to electronically receive references for adoptive families. The electronic reference module replaces the need to send and receive paper-based references. The results of electronic references are placed in the case notes of the adoptive family.

Survey Module

The survey module allows the adoption agency or an attorney to create electronic surveys that either the adoptive family references (recommendation provider) can take online. The results of the survey are stored in the adoptive family or birth parents case notes. Surveys are comprised of yes/no questions, multiple-choice, and text answers.

Event Management Module

The Event Management module enables the agency or attorney to schedule events both single and reoccurring and for your paid.   The event management system can be integrated into the agency or attorney's website or be viewed only by families or individuals that are logged into MAP.

Reporting Module

The reporting module is a drag-and-drop end-user tool that allows the adoption agency or attorney to report on any data within the system. Reports can be created on the fly and fully customized to meet the needs of the adoption agency or attorney. The module was designed with ease-of-use in mind.

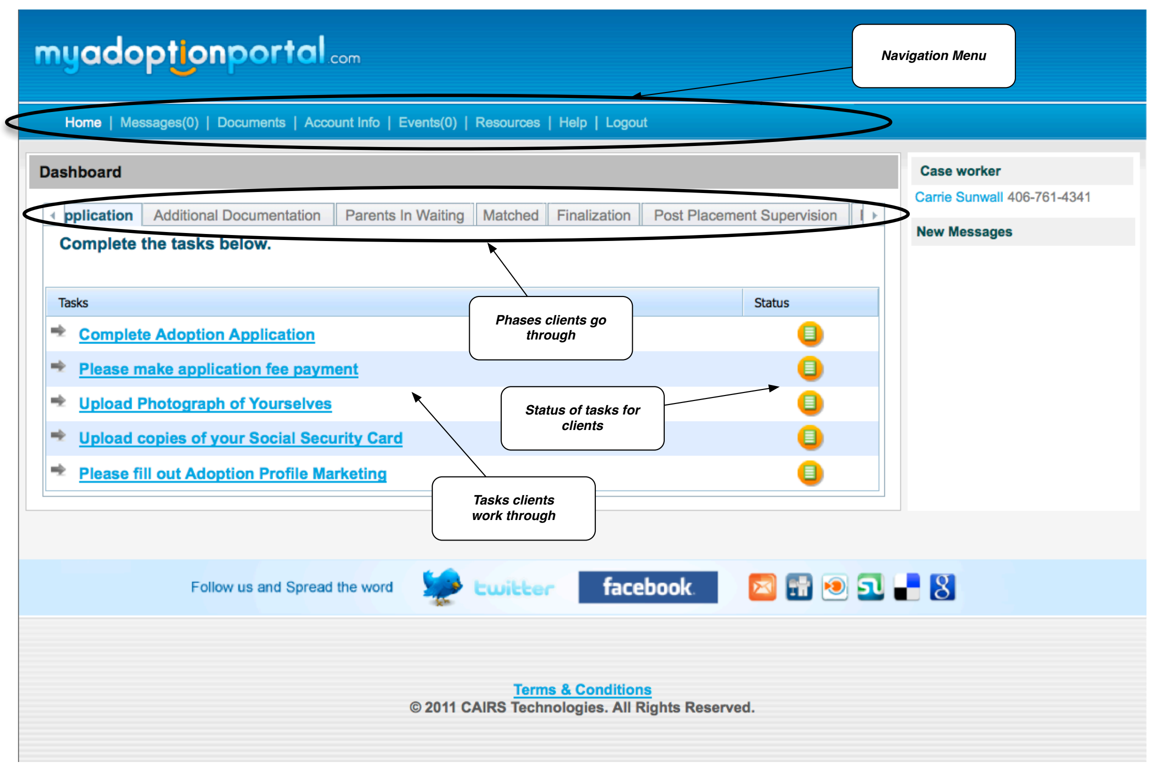
Adoptive Parent Navigation & Tasks

Introduction to client environment

The adoptive parent portal provides the family the ability to participate in the adoption process by providing their information, making payments, viewing status, and managing their information.

The following functions:

- Complete tasks and view their status
- View their caseworker information
- Message with caseworkers
- View and upload documents
- Update their account information and change passwords
- Register for events
- View and add resource links

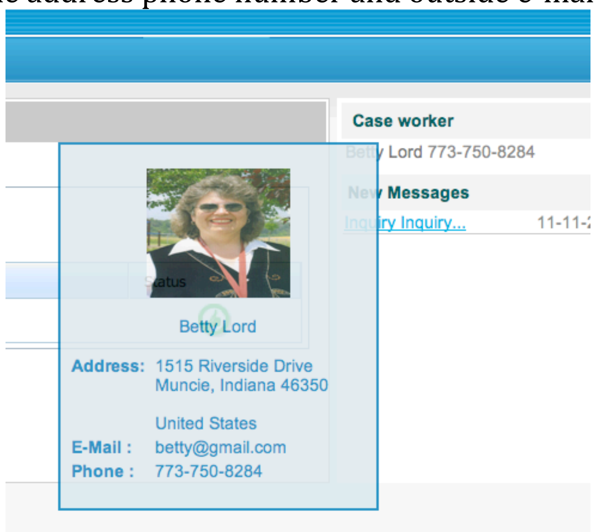


Function Navigation

To navigate to any of the various areas within the client screen, select the appropriate menu item in the navigation menu located at the top of the screen.

Task Navigation
To work on any task, click on the task name located the task box.

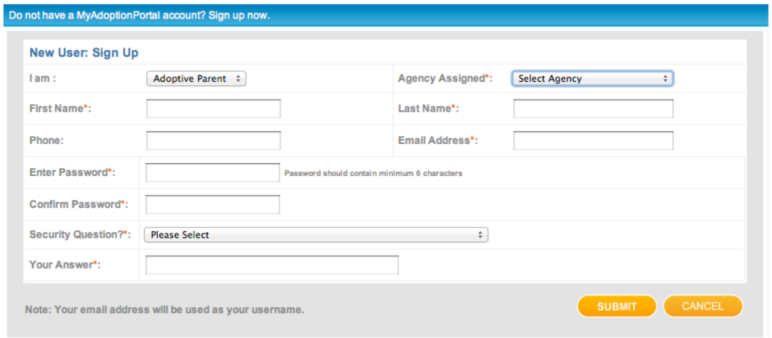
Casework Information
The caseworker information can be found by placing the cursor over the caseworker's name that is highlighted in blue.   A picture of the caseworker will appear along with the address phone number and outside e-mail.



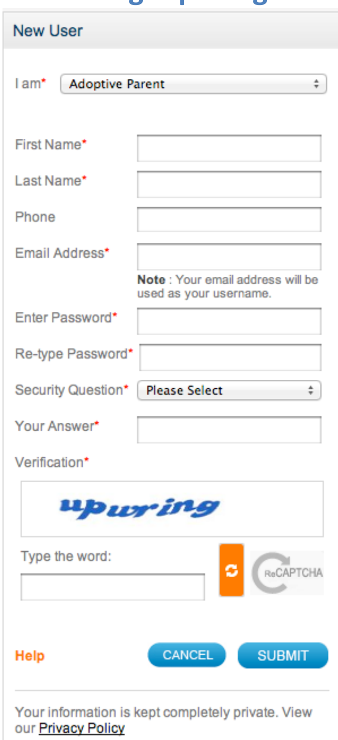
Signing up to work with the agency
MyAdoptionPortal.com provides three methods for a prospective adoptive family or birth parent to sign in and gain an account. The method selected will vary based on what you have decided. The three methods include:

- Default new user sign-up batch available in MyAdoptionPortal.com and hosted on your website.
- A custom form created for you on your website
- Through the main page located out www.myadoptionportal.com

MyAdoptionPortal.com signup



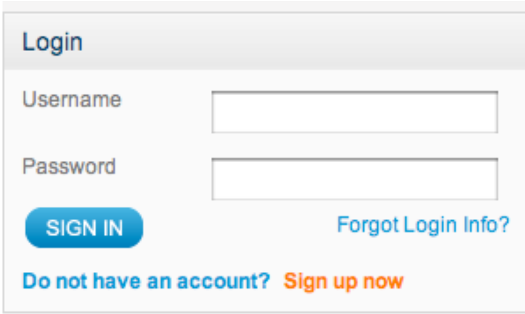
Default signup badge on agency website



Signing into MyAdoptionPortal.com

Signing intoMyAoptionPortal.com can be done through a badge on the agency or attorney's website or through www.myadoptionportal.com. MAP uses the clients e-mail address as their default username.

Login badge on agency or attorney website



Login at www.myadoptionportal.com

Adoptive family tasks

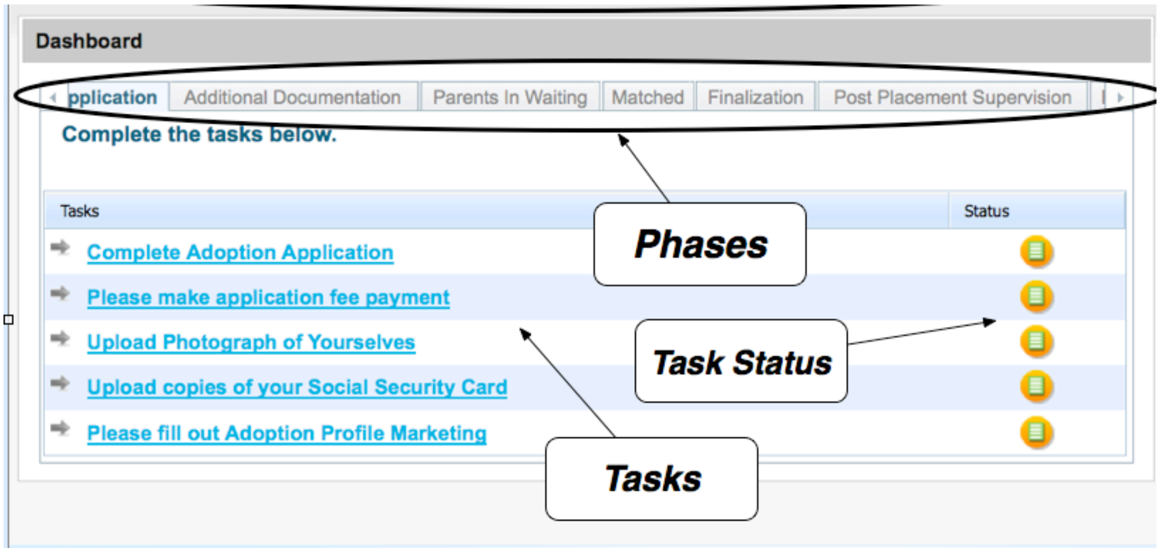
When the adoptive family logs in, they will see the phases, stages, and tasks relating to their adoption. As the family completes the tasks, MAP will change the status of the task from new through approved. Each of the task status types are identified below in the task status are below.

Clients can only move into another phase when they have completed all of the tasks in the current phase and the tasks have been approved by the caseworker. The approval of tasks, reviewing those tasks, and approving or rejecting those tasks is outlined below in the task approval process outlined below.

Tasks within a current phase can be grouped together under stages. Your administrator controls the configuration of faces, stages, and tasks.

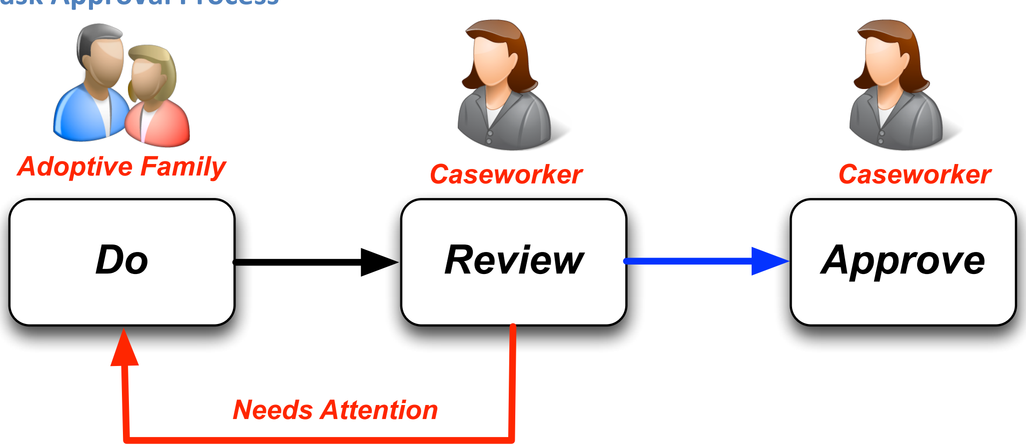
The caseworker is notified when the task has been completed so you can be reviewed. The caseworker can either approve or reject the task. If the task is approved the status on the client screen will change to approved or thumbs up. If the task is rejected, then the status and the client screen will change to thumbs down and the client will be notified additional work is required. The caseworker can send a message to the client when they are changing the status of a task.

Dashboard with Phases & Tasks



Task Status

Task Approval Process



Messaging

The messaging system within MAP provides the ability to communicate between the adoptive family and the caseworker. All communications between the caseworker and the adoptive family is placed into the adoptive families case notes.

To enter into the messaging system, select messages from the navigation menu at the top of the screen. The number of messages that have been unread will be displayed next the word messages and on the right-hand side of the screen called new messages.

Read a Message

To read a message click simply click on the subject of the message. Click on the subject will bring up the message in a new window. You can then you can type in a response to the message and send or select cancel. When replying to a message, you can also attach a file by selecting the attached file option.

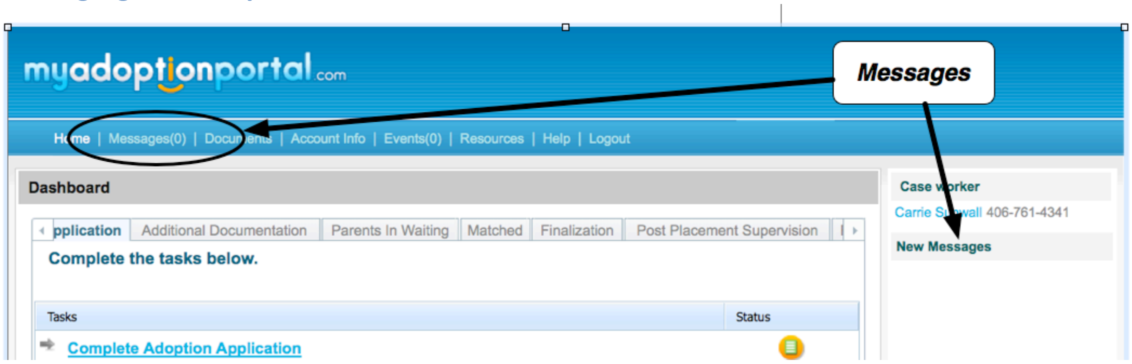
Create a Message

To create messages select the new message button from the main message area. Once you have selected the new message, you can add recipients by selecting the recipient book that is located on the right-hand side of the screen. A file can be attached to the message by selecting the attach a file option in the message (see Message Creation Screen)

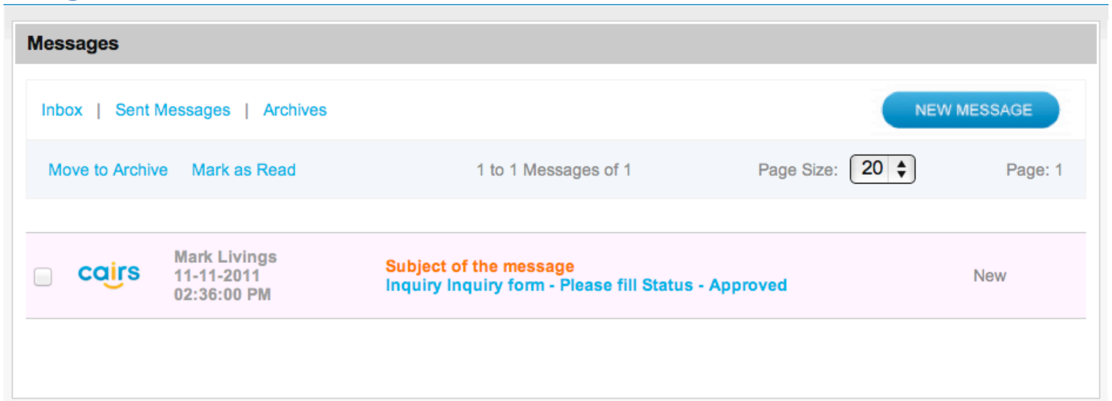
Moving a Message

Messages can be moved from the inbox or sent messages area to the archive area by selecting the move to archive option located on the main messaging screen. No message can be removed from the system.

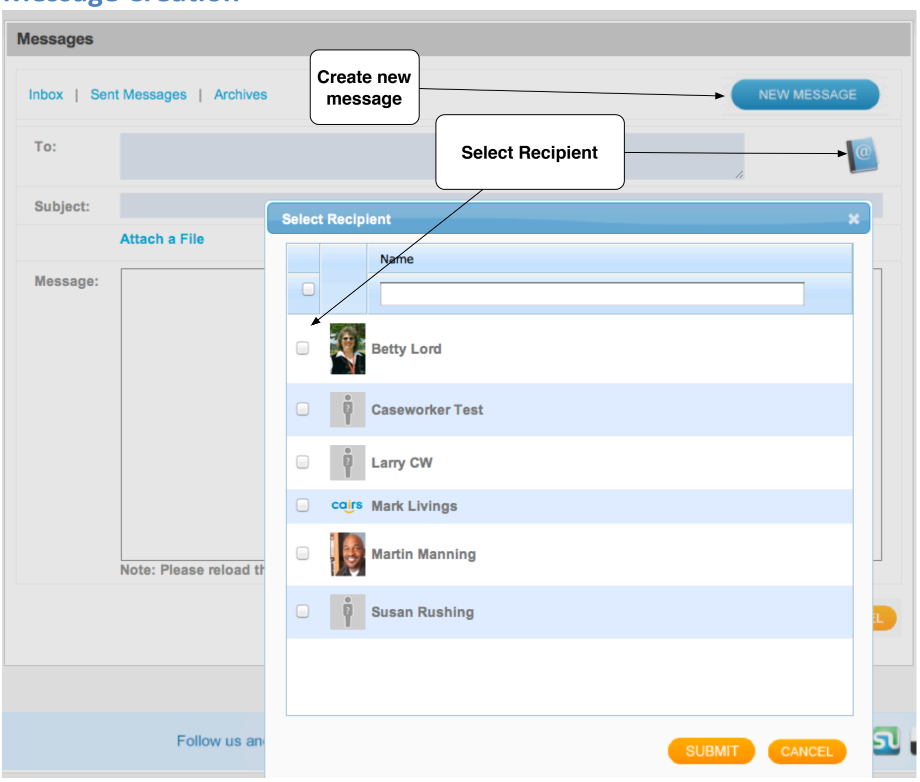
Messaging Menu Option



Message In-box



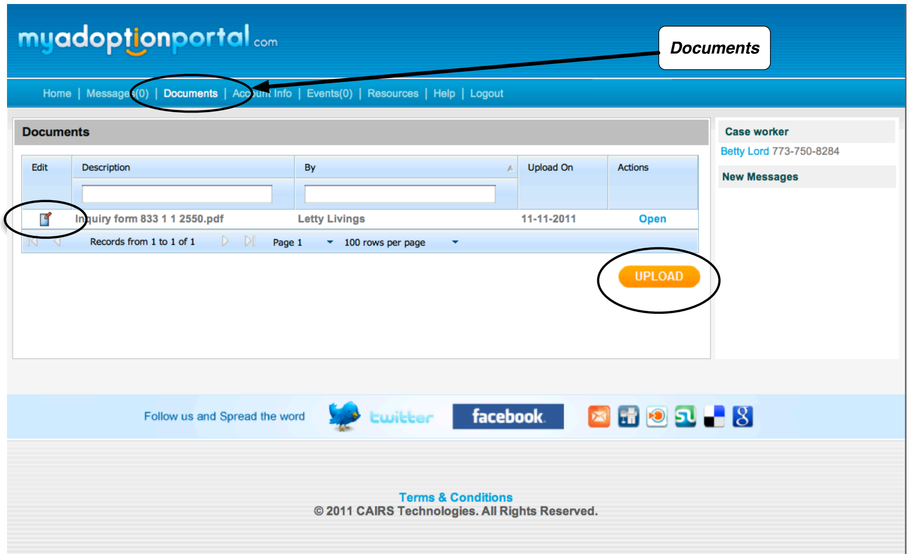
Message Creation



Documents

The documents area contains the documents that have been uploaded by the adoptive family or caseworker and all documents that have been signed or created by the adoptive family. All documents that are uploaded were generated in this area are also placed in the case notes under the adoptive family. The document system supports versions of documents, identification through file tags, and distribution of documents to multiple groups by the caseworkers.

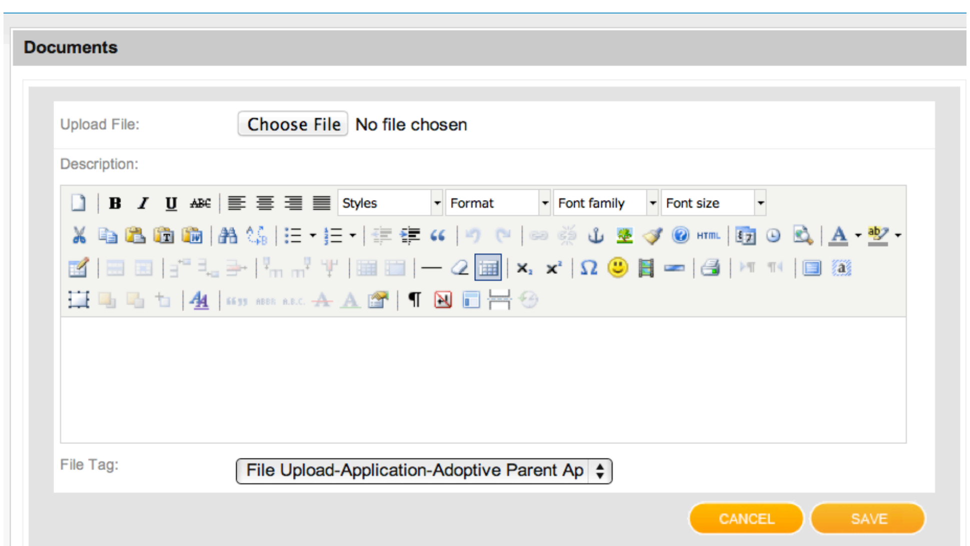
To enter into the documents area, select “Documents” from the main navigation menu in the client portal. When you enter the area you will see the description of the document, who uploaded the document, when they uploaded the document, and actions to open and edit the description of the document.



Upload a Document

To uploaded document, select upload from the main document screen. After you select uploaded document, you will be presented with the upload screen that allow you to:

- Choose a file
- Type and description,
- Set the file categorization profile tag

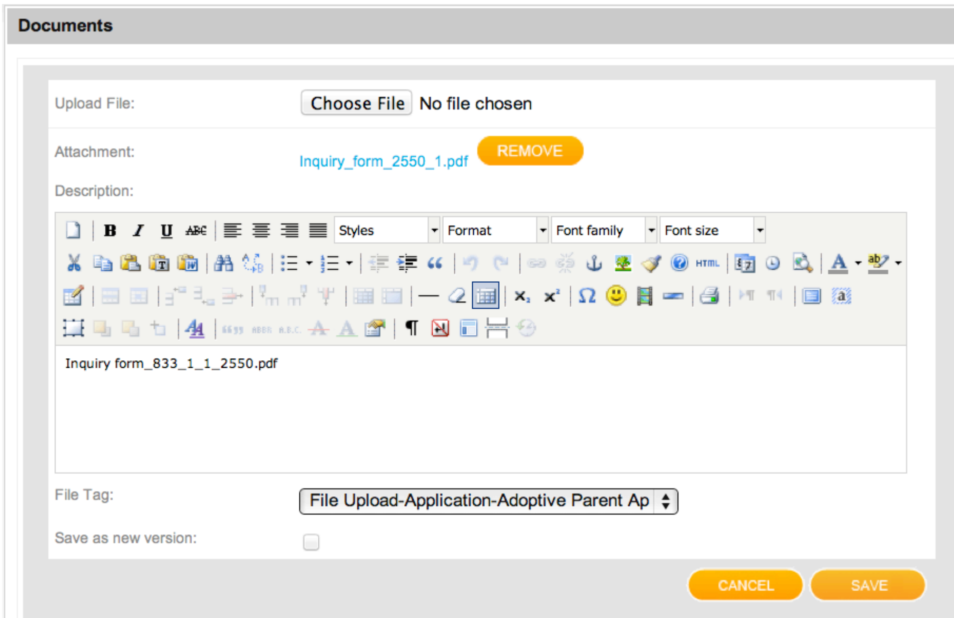


Edit a Document

The edit function under the documents area allows you to change the following:

- Description of the file,
- File tag
- Create a new version.

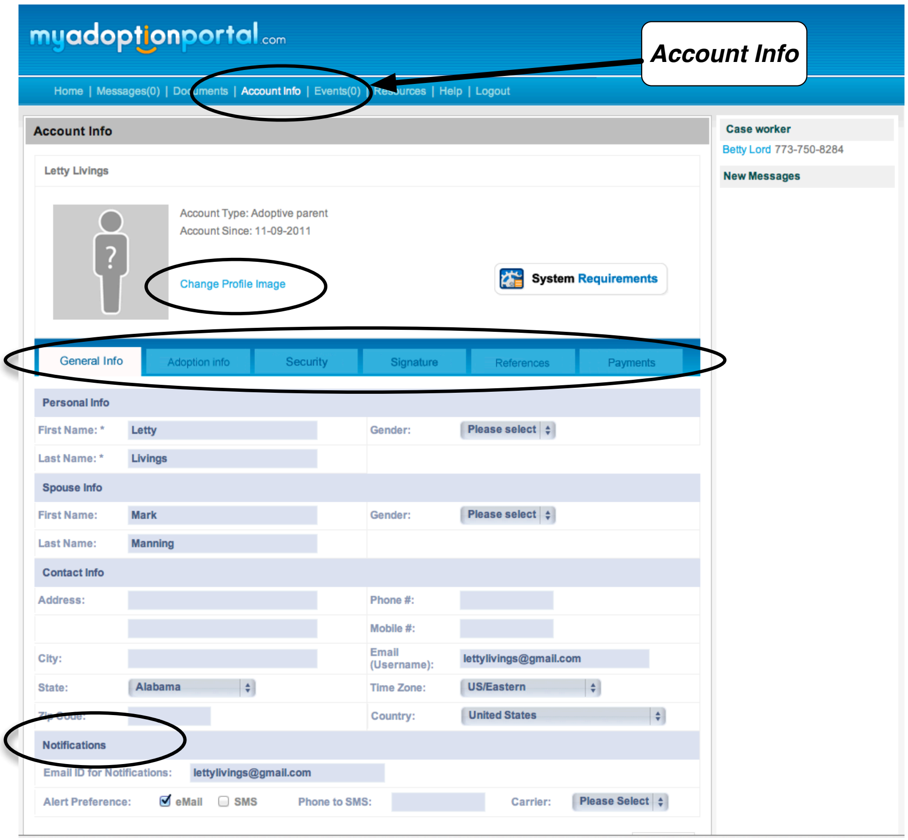
To edit the document select the edit icon, which is located on the main document screen.



Account Information and Administration

The account information contains all the functions necessary for the client to maintain their account.   This area allows the client to manage the following:

- Profile image
- Personal information
- Configure how the system notifies them
- Changing of passwords
- Update references
- View Payments and Expenses



Change Profile Photo

The photo representing the account can be changed by selecting the "Change Profile Image" link on the main account information screen. The user is prompted to select a local file that contains a photo and then uploaded to the system. Once the photo was uploaded to the system the caseworker will be able to view the client by their picture on their main screen and within the messaging system.

Entering Contract Information

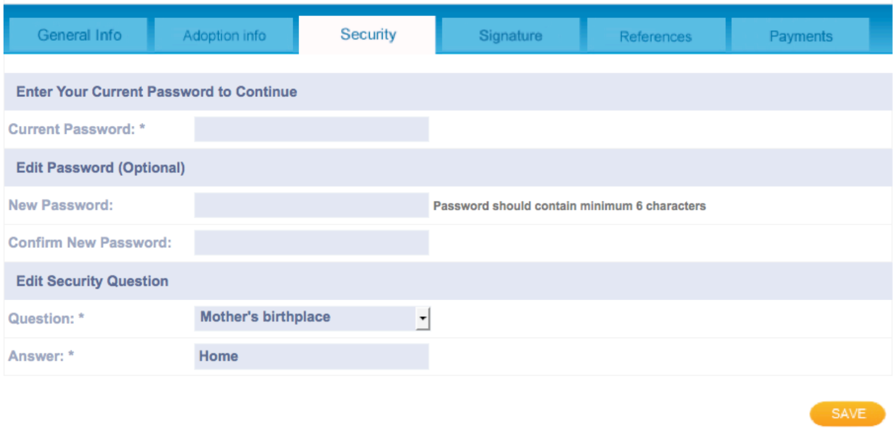
Contact information can be entered or updated in the personal information, spouse information, and contact information screens. Much of this information is captured during the application or other electronic forms that are filled out.

Enabling Notifications From MAP

The client can be notified by MAP when a message has been sent to them, a task status has changed, or text message is sent. To enable notifications, the type of notification should be selected and then configured. The email notification requires a valid email address. The text message notification requires a valid cell phone number and carrier selected.

Channing Passwords and Security Challenge

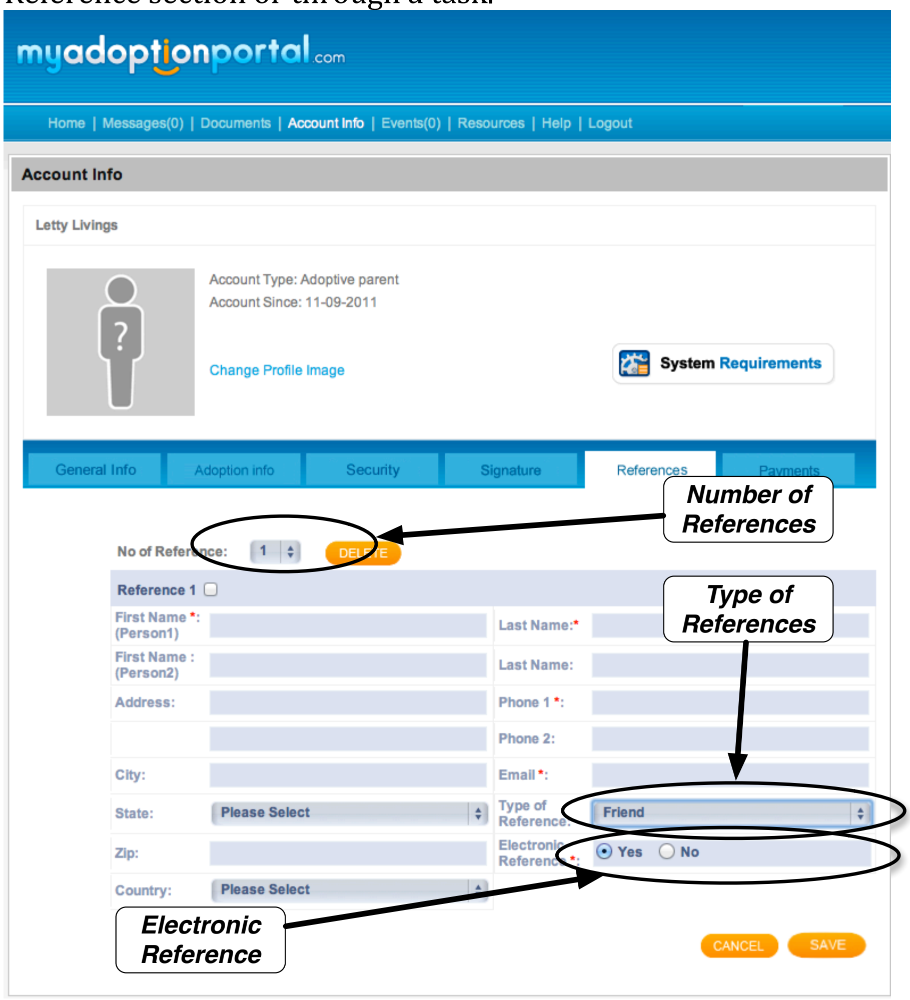
To change the password on the account, select the security tab and enter in the current password and the new password.   Passwords must be 6 characters long at a minimum.



References

The reference section provides adoptive parents an area where they can list all of their references for the adoption as required by the agency or attorney. The module is configurable and can support various types of reference types such as Employer, Friend, Church, and others. In addition to supporting the various types, the module also supports electronic references, which allows the person providing the reference to provide it on-line.

References can be entered in MAP either directly by going to the Account Info / Reference section or through a task.

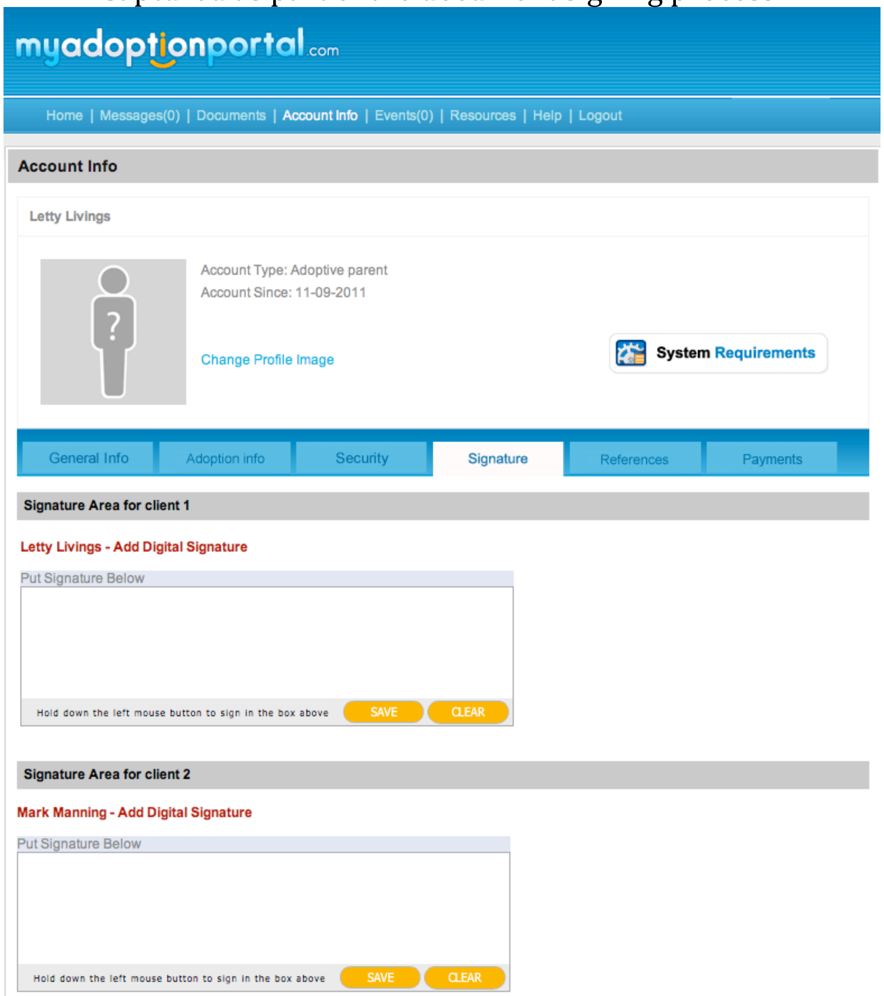


Digital Signature

The digital signature area contains the signatures of the adoptive family that will be applied to documents as defined as defined by the agency or attorney. The adoptive family is captured by:

- Going to the area and entering their signature using a mouse

- Captured as part of the document signing process



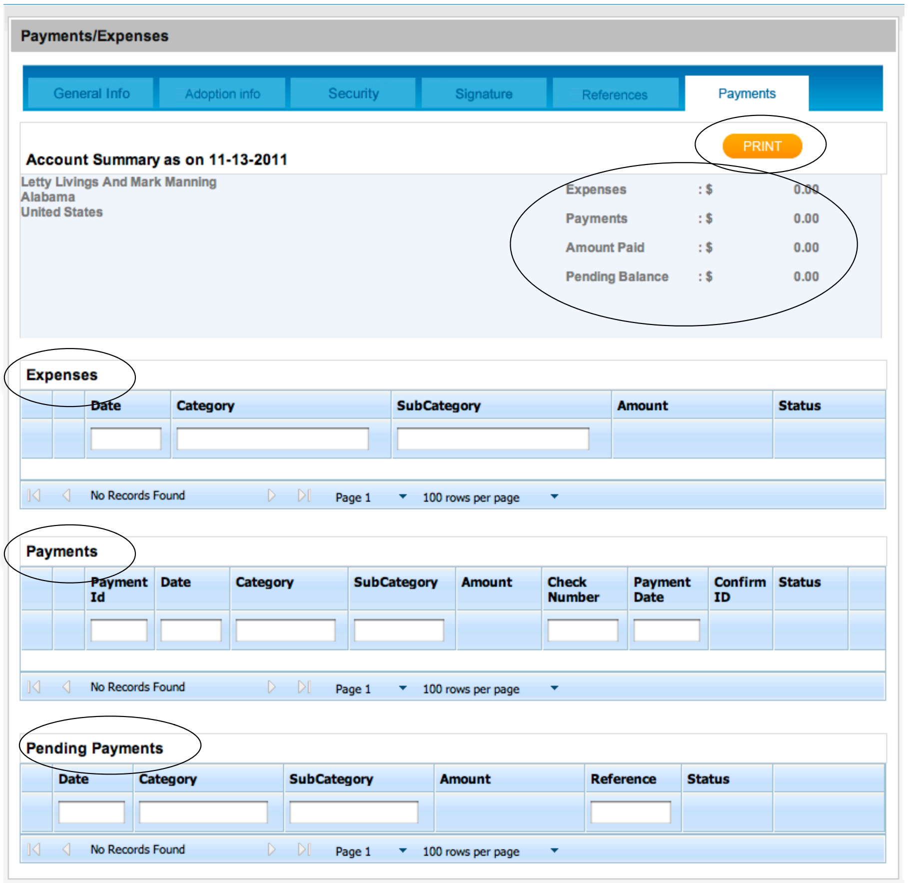
Payments

The payments section provides the adoptive family the ability to view all payments and expenses for the adoption including any payments that are pending. Printing is provided on an as needed basis.

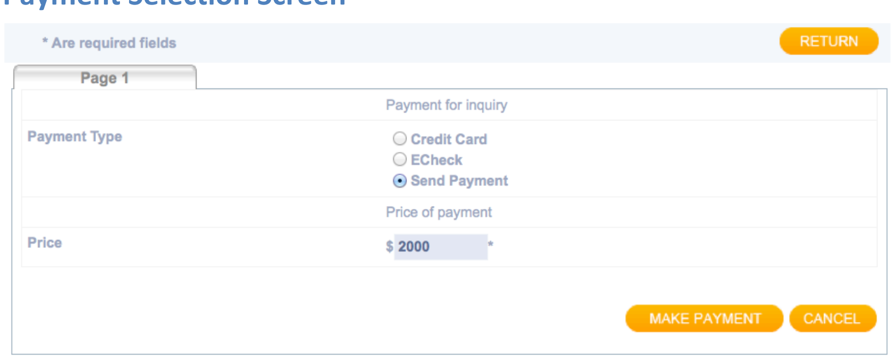
All payments made or recorded in the MAP system will produce and entry in the clients payments area along with placing a receipt in their notes area.

MAP supports three different types of payment types, which can be configured by the agency or attorney. The three payment types include:

- Requesting payment is sent through mail
- PayPal and/or credit cards
- CAIRS SOLUTIONS ECheck product

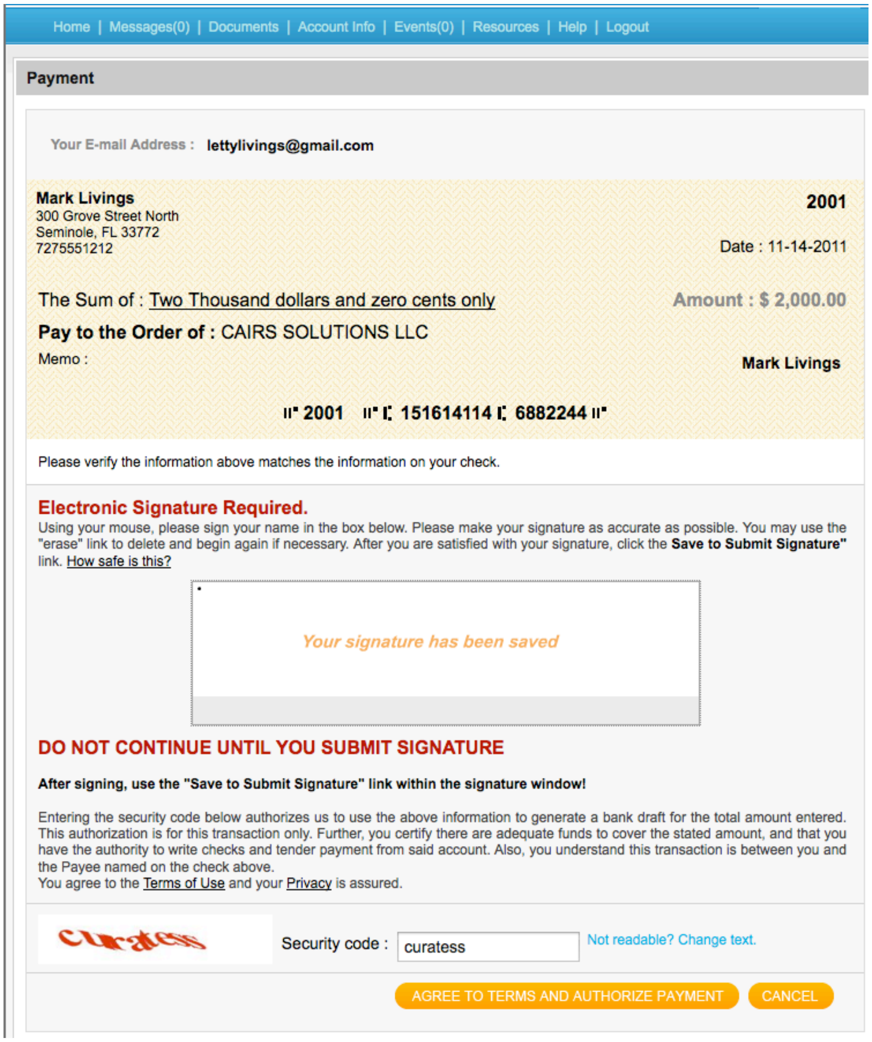


Payment Selection Screen



ECheck Payment Screen

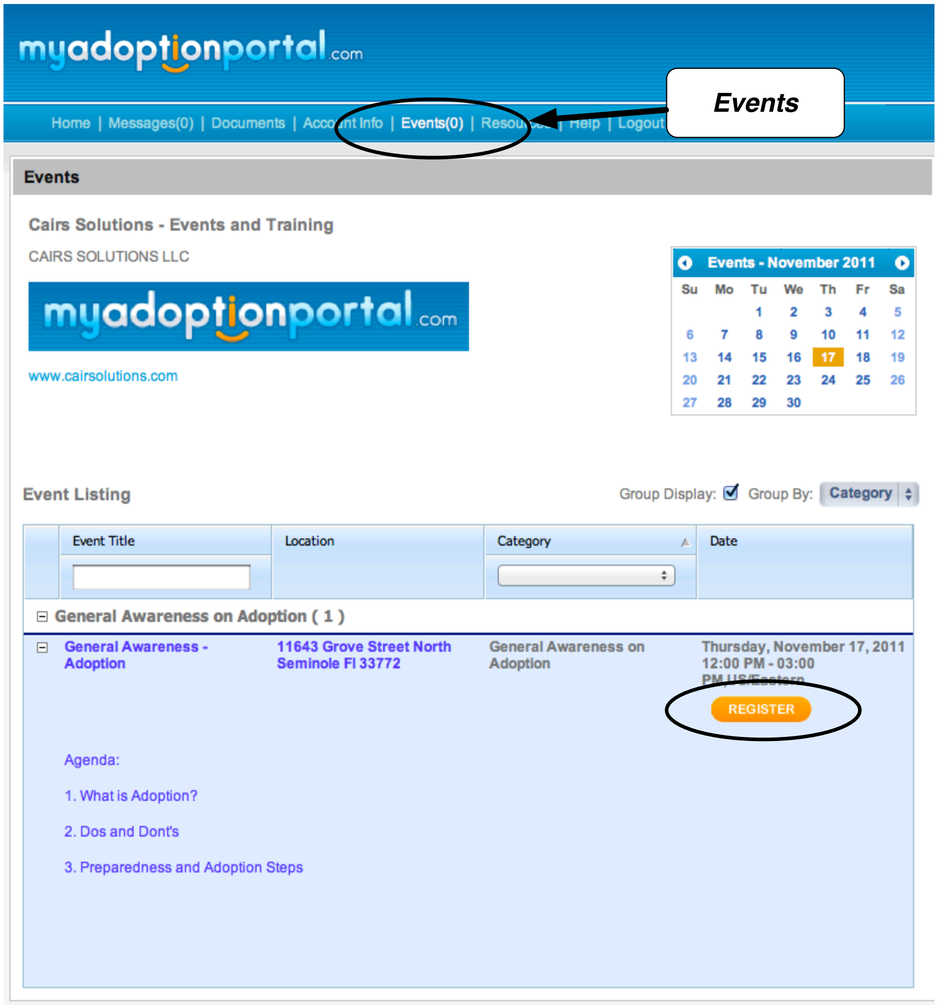
The ECheck payment option allows parents the ability to make a payment to the agency or attorney by creating an on-line check. The adoptive parent provides their bank routing and account number along with signing the check with their mouse. Once the information has been received and the signature has been captured the agency or attorney can print the check out locally and deposit in their bank account.



Events

The events module allows the agency or attorney to manage events that families can register for. The events can be tailored to a specific group, internally, externally, paid, and non-paid. Families for example in the domestic adoption program would not see events that are for families that are interested in other programs such as international.

Families can signup for events by selecting the “Register” button on the events screen or by being directed by a particular rule.


myadoptionportal.com
Events
Home | Messages(0) | Documents | Account Info | Events(0) | Resources | Help | Logout
Events
Cairs Solutions - Events and Training
CAIRS SOLUTIONS LLC
myadoptionportal.com
www.cairsolutions.com
Events - November 2011
Su Mo Tu We Th Fr Sa
1 2 3 4 5
6 7 8 9 10 11 12
13 14 15 16 17 18 19
20 21 22 23 24 25 26
27 28 29 30
Event Listing
Group Display:
Group By: Category
Event Title
Location
Category
Date
General Awareness on Adoption (1)
General Awareness - Adoption
11643 Grove Street North Seminole Fl 33772
General Awareness on Adoption
Thursday, November 17, 2011 12:00 PM - 03:00 PM US/Eastern
REGISTER
Agenda:
1. What is Adoption?
2. Dos and Dont's
3. Preparedness and Adoption Steps

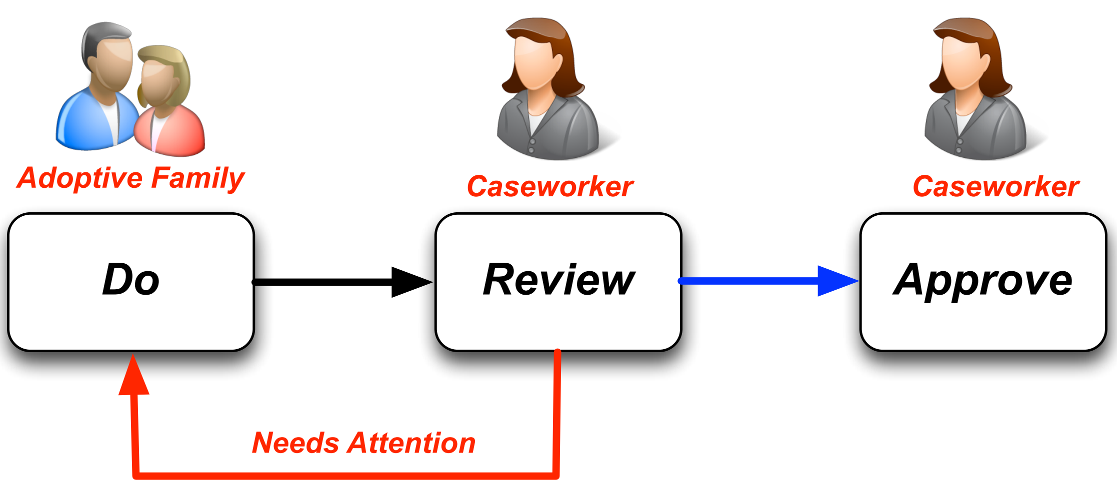
Caseworker Navigation & Functions

Overview of environment

The caseworker environment provides access to the necessary tools and information to manage clients who are registered in the MAP system. The process of managing adoptive families or birth parents includes:

- Entering and tracking information
- Reviewing tasks and providing feedback
- Producing necessary documents
- Communicating with clients
- Assigning clients to caseworkers and groups

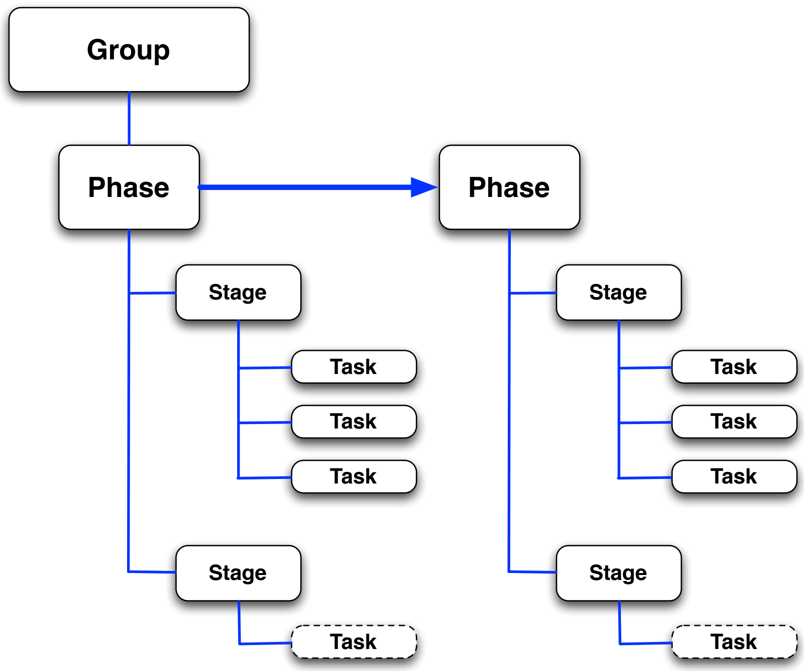
The MAP system is designed to work with the adoptive family or birth parents throughout the adoption or home study process. The family completes a number of tasks, which the caseworker reviews. While reviewing the task the caseworker determines if the family has successfully completed the task OR can send back a status to the adoptive family that additional work is required. When the tasks are completed the adoptive family or birth parent can continue to work on the other open tasks or proceed to the next phase of their journey.



Groups, Phases, Stages, and Tasks

MAP provides the agency or attorney the ability to break down their adoption process in to groups, phases, stages, and tasks. The most basic work unit is the task. Tasks are combined together under a stage. Stages are combined together and rollup to a phase. A single or multiple phases rollup under a single group type. Each group is defined to be either one of three types:

- Inquiry type
- Adoptive Parent
- Birth Parent



Groups

Groups are the highest unit support by MAP. The group is sometimes referred to as the program within an agency or attorney's office. Clients are assigned to a single group or multiple groups which then in turn define the role they are playing (inquiry, adoptive parent, or birth parent) AND the workflow they need to follow. Groups can have any name and are defined at system configuration time. Example groups include:

- Domestic Adoption
- Homestudy
- Birth Parent

Groups can send out notifications when all of the tasks have been completed and the client is moving on to the next phase.

Phases

Phases are a grouping of stages. The phase name, description, and notification capability is created during system configuration. A phase must be completed before a client can move to the next phase. The adoptive family must complete all the tasks in the phase AND have them approved by a caseworker before they are allowed to move forward. In a full adoption there can be anywhere from 3 – 7 phases that makeup a single group. For a Homstudy only there is only one phase normally called "Homestudy".

Stages

Stages are logical groupings of tasks that need to be completed prior to moving on to other tasks within a stage. At a minimum, a single stage must exist in a phase. MAP can be configured to send out a message to a single person or group when the tasks associated with the stage are completed.

Tasks

Tasks are the most basic work unit. Individual task can be made visible or invisible by the caseworker as required. MAP's rules module can be used to make tasks visible or invisible based on the data entered by a client or caseworker.

Tasks can be configured to be manually approved by the caseworker or auto approved when the client completes them. In addition, a notification can be configured at the task level to notify a person or message group of the task being completed.

Tasks can be configured to support any of the following actions:

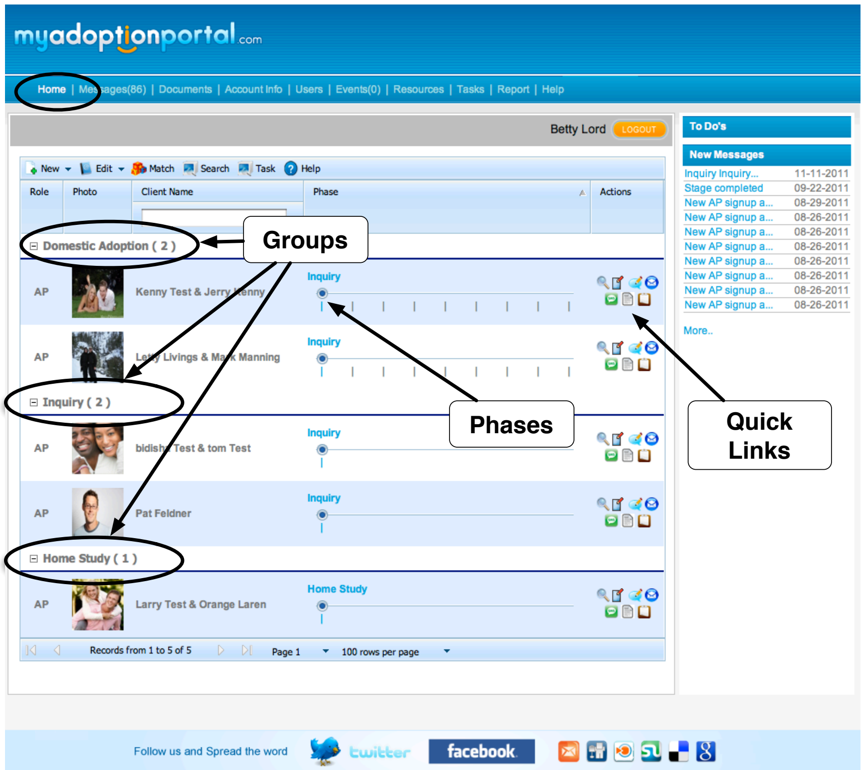
- Fill out an electronic form. Electronic forms can be configured to support more actions including:
    - Gathering information
    - Uploading files
    - Taking a payment
- Re-direct to a specific page
- Upload a document
- Take a survey
- Register for an event
- Generate a form

Caseworker Home Screen

The caseworker home screen provides a visual view of all the groups, families in the groups, and where they are at in their process. From the caseworker home screen the caseworker can perform the following:

- View quick facts by placing cursor over the picture of the family
- View the status of a family by looking at the phase progress bar
- Select a quick action button and perform the following:
    - View / approve / reject client tasks
    - View / change client login information
    - View / change the groups and caseworker(s) the client belongs to
    - Post a casenote
    - Send a message with or without a template

- Send a text message to the client
- Produce a document
- View client detail



Client On-boarding

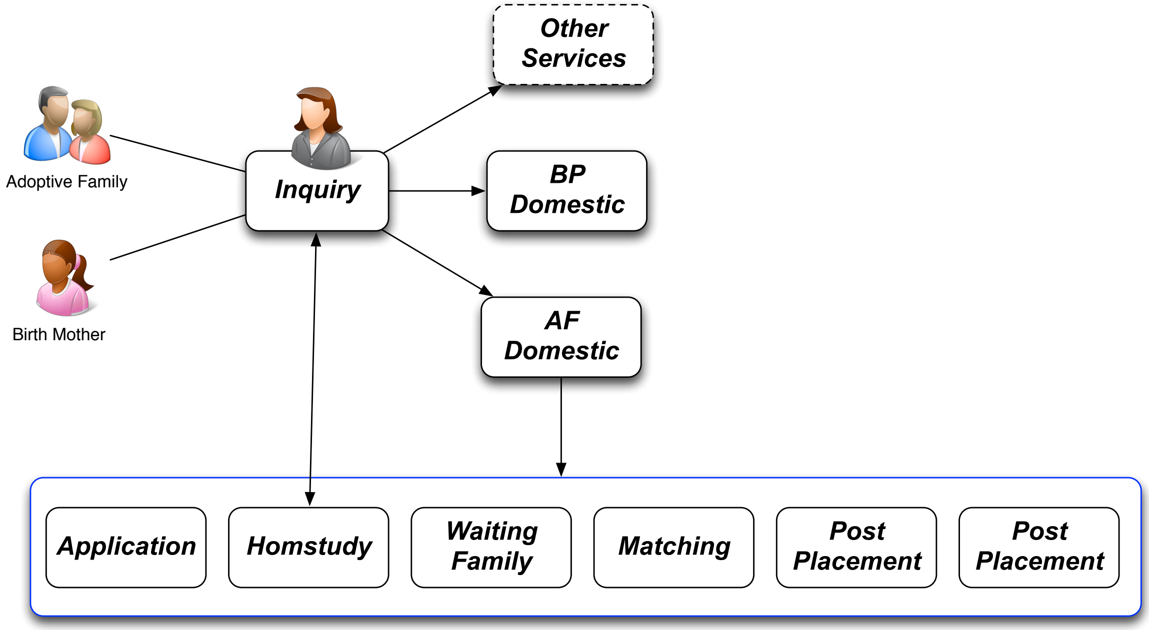
There are various approaches to start working with an adoptive family or birth parent in the MAP system. The first step to work with the client is to determine the services they require and route them to the correct caseworker and group. The clients can enter MAP through one of the following methods:

- Web based inquiry screen
- By attending an external event at the agency or attorneys office and receiving a login
- Direct entry by a caseworker

The MAP system can be configured to support the following on-boarding processes:

- **Automated** – No caseworker involvement is required. MAP will assign the client automatically to the appropriate group and caseworker.
- **Centralized** – All clients come into a standard inquiry group and then a caseworker is assigned to review each case and manually move then to another group / caseworker.
- **Decentralized** – Clients are routed to a specific group and caseworker depending on specific criteria such as zip code, county, or state.

- **Hybrid** – Combination of a centralized and decentralized model



Caseworker Functions

MAP provides the caseworkers the core functions required to support adoptive families and birth parents throughout their adoption. Information about the adoption can be entered, updated, and reported on throughout the entire adoption process.

Caseworker tasks include:

- Creating new users
- Entering and managing information about the adoptive parent or birth parent (clients)
- Assigning users to groups and caseworkers
- Creating and updating casenotes
- Messaging between the caseworker and their clients
- Reviewing, approving, and rejecting adoptive family tasks
- Changing the visibility for a particular task for a client
- Sending a message with a template
- Another others !

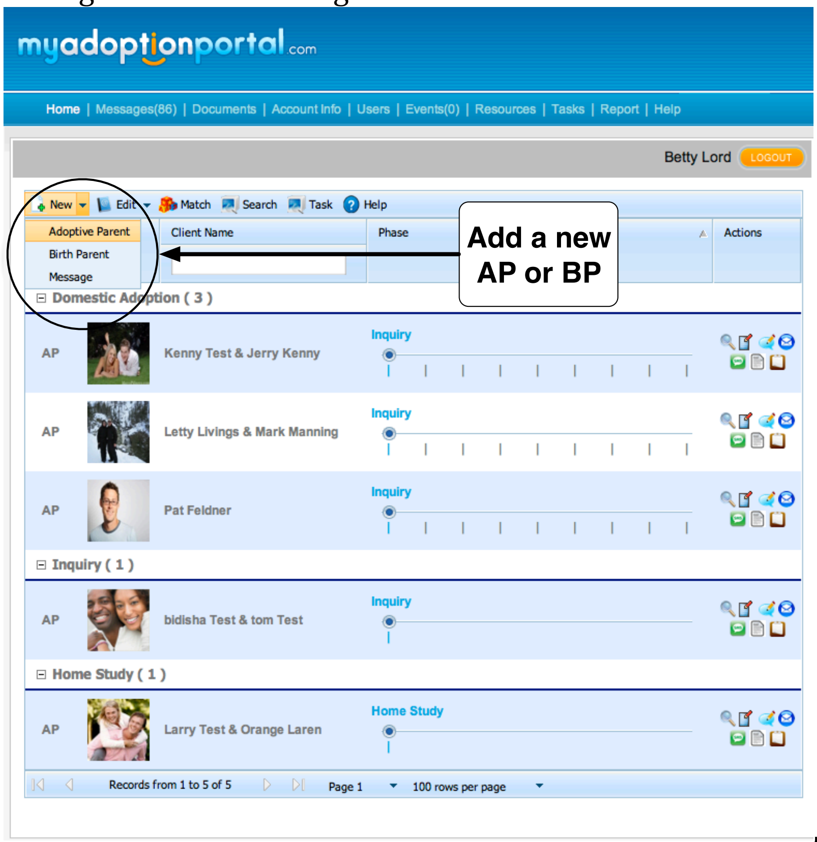
Adding a client (adoptive family or caseworker)

Adding a client to MAP is accomplished by:

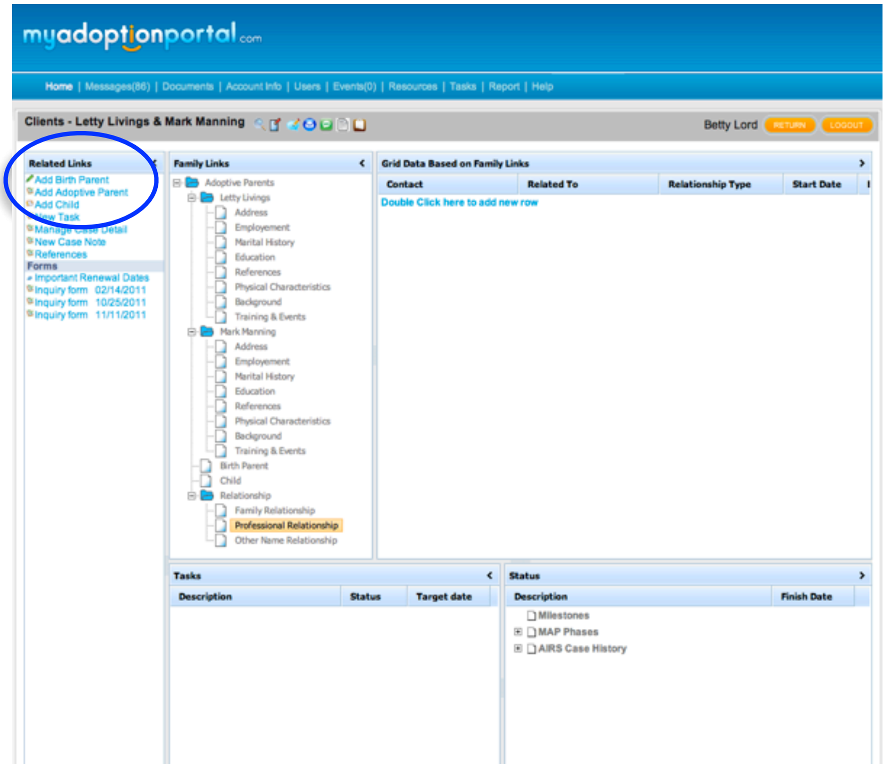
- On the caseworker home screen select New -> Adoptive Parent or New -> Birth Parent

- On the 6 panel data screen select “Add Birth Parent” or “Add Adoptive Parent”

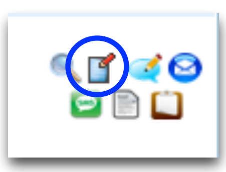
Adding a new user through the caseworker Home screen.



Adding a new user through the 6 panel screen



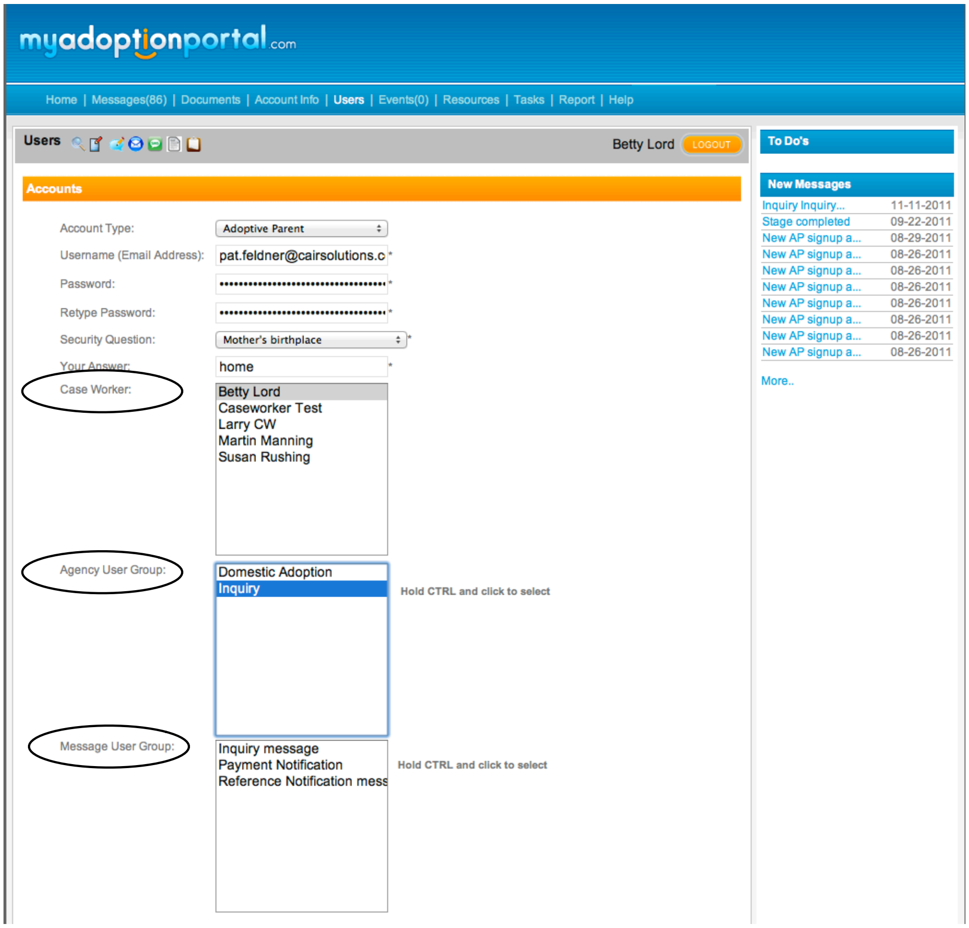
Assigning a client to a caseworker and moving client from one group to another



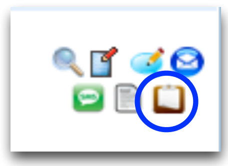
Assigning a client to a caseworker or group is accomplished through the user screen. The user screen can be accessed through the quick menu icons by selecting the user from the caseworker screen and selecting the circled icon identified above.

When the individual user screen is presented the caseworker(s), group(s), and message group(s) can be selected.

When selecting a caseworker only the groups that the caseworker belongs to will be displayed.


myadoptionportal.com
Home | Messages(86) | Documents | Account Info | Users | Events(0) | Resources | Tasks | Report | Help
Users
Betty Lord
LOGOUT
Accounts
Account Type:
Adoptive Parent
Username (Email Address):
pat.feldner@cairsolutions.c
Password:
Retype Password:
Security Question:
Mother's birthplace
Your Answer:
home
Case Worker:
Betty Lord
Caseworker Test
Larry CW
Martin Manning
Susan Rushing
Agency User Group:
Domestic Adoption
Inquiry
Hold CTRL and click to select
Message User Group:
Inquiry message
Payment Notification
Reference Notification mess
Hold CTRL and click to select
To Do's
New Messages
Inquiry Inquiry... 11-11-2011
Stage completed 09-22-2011
New AP signup a... 08-29-2011
New AP signup a... 08-26-2011
New AP signup a... 08-26-2011
New AP signup a... 08-26-2011
New AP signup a... 08-26-2011
New AP signup a... 08-26-2011
New AP signup a... 08-26-2011
New AP signup a... 08-26-2011
More..

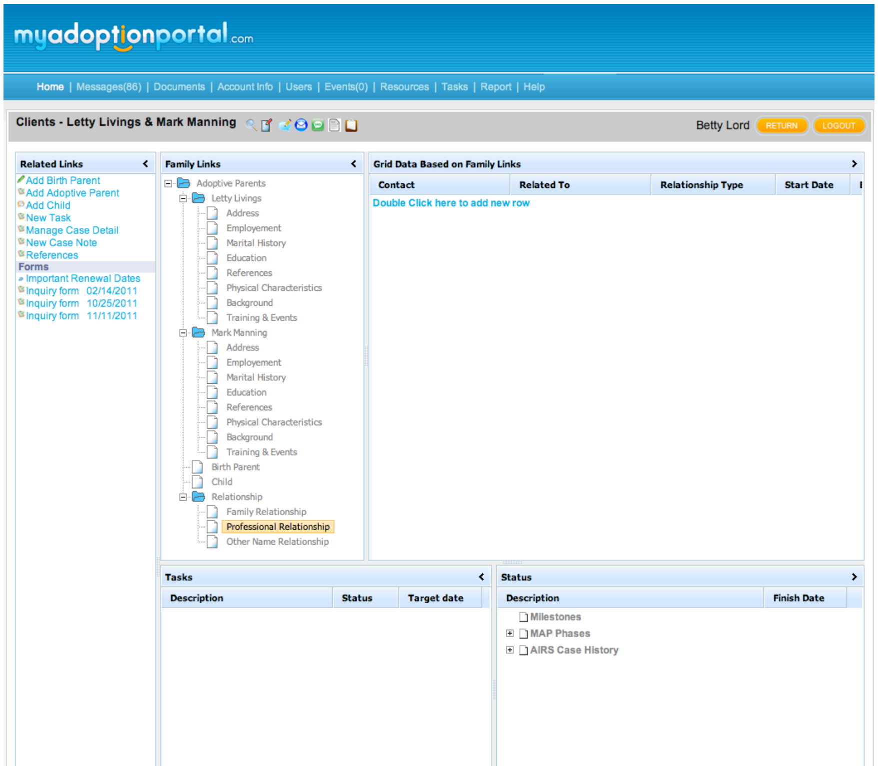
Viewing and updating client data (6 panel)



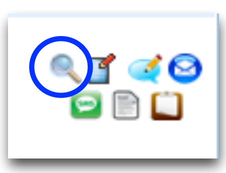
Access a client detail data screen can be accomplished through selecting the icon circled above for the client you want to access. When you select the icon the data panel for the specified client will be presented.

The client data screen is comprised of the following 6 sections:

- Related links – The related links section enables you to add new users, tasks, view references, and other functions.
- Family links – The family links section contains the clients, their data categories, birth parents they are matched with (if they have been matched), the child being placed, and relationships.
- Forms - The forms section contains any custom data forms specific for the agency AND completed forms the family has filled out.
- Grid Data – The grid data section contains the actual data of the section selected under the family link area. Data can be entered directly into this area by click on “Add Data” on the bottom of each grid.
- Tasks – The task section contains the caseworker tasks for this adoption and the % complete.
- Status Area – Shows the phases for the client and AIRS tasks associated with this client. The AIRS tasks are specifically for customers who used AIRS prior.
- Casenotes – The casenote section contains the casenotes and files for the client.

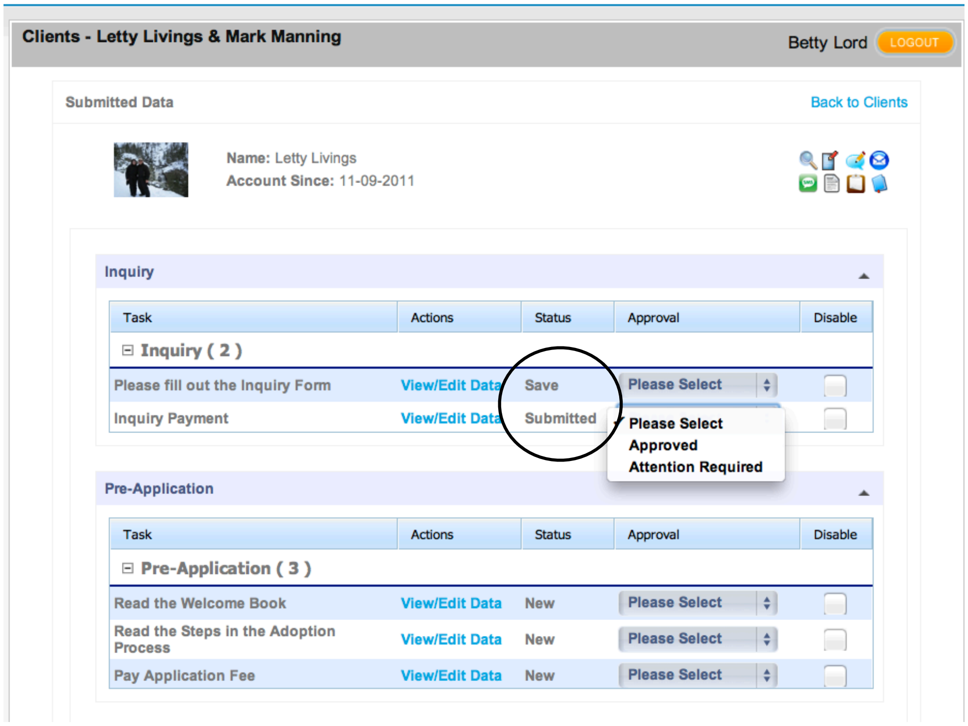


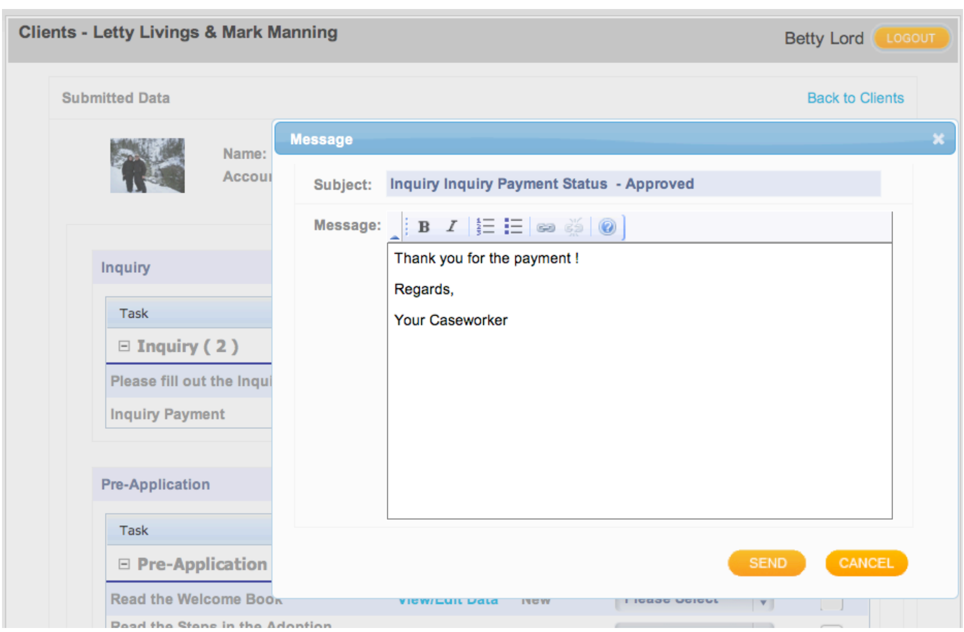
Viewing and approve or rejecting clients tasks



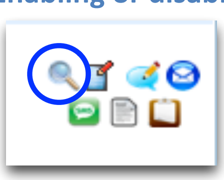
Client tasks can be viewed, approved, or rejected by selecting the circled icon for the client you want to access. Upon selecting the icon, the client's phases, stages, and tasks are presented. The screen will show the actual task, status, approval status, and switch to turn on/off the task for the client.

To review a specific task, select "View/Edit Data" on the task that you want to view. You will see the results of what the client has submitted. Upon viewing, you have the option to approve or reject the clients submission. Either selection (approve or reject) will present a window that gives you the opportunity to send a message to the client.



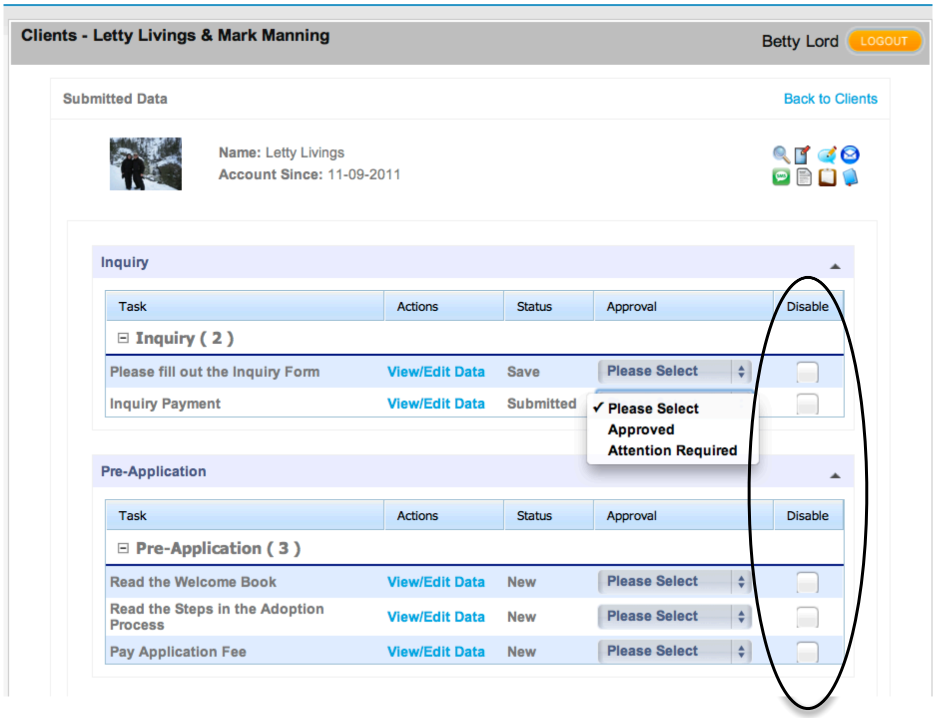


Enabling or disabling a client task



All client tasks by default are enabled. Tasks can be disabled either manually or through use of the rules engine. To enable or disable a task select the circled icon identified to the left to enter in to the clients phase / stage / task list.

Each individual task has a checkable disable box located to the right of each task. Toe disable as task select the box. Once selected the client will not longer see the task. To re-enable the task check the box a second time.



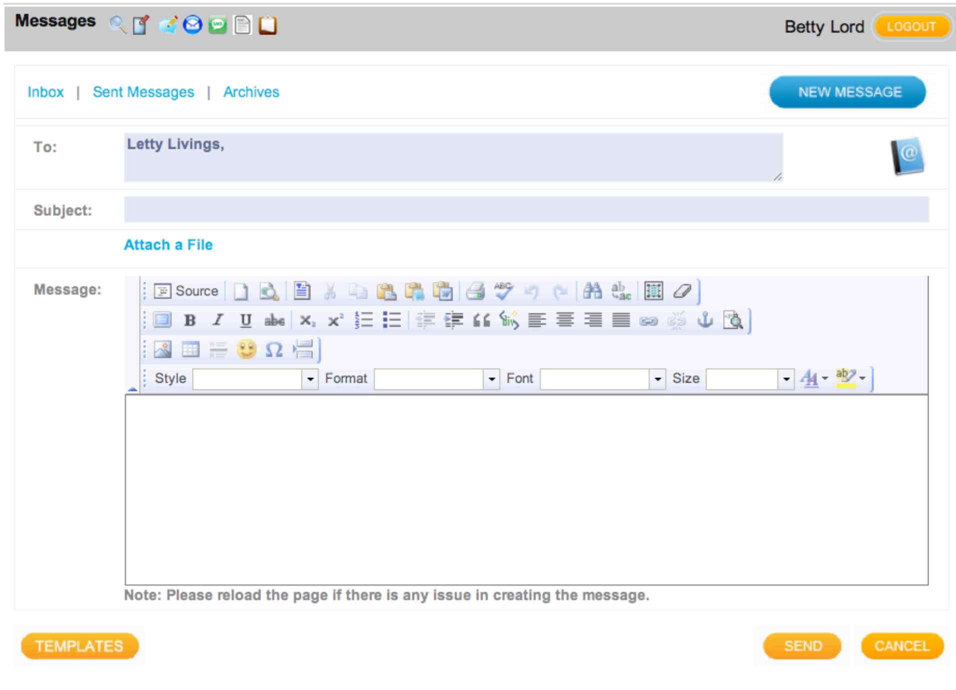
Sending message and adding a template

Send a message to the client with or without a template can be accomplished by selecting the blue envelope on the quick links menu (icon circled on the left). Templates are designed to include the clients information in the message. As an example, a template could have "Dear App1Fname" which when sent would replace the variable "App1Fname" with information of the client.

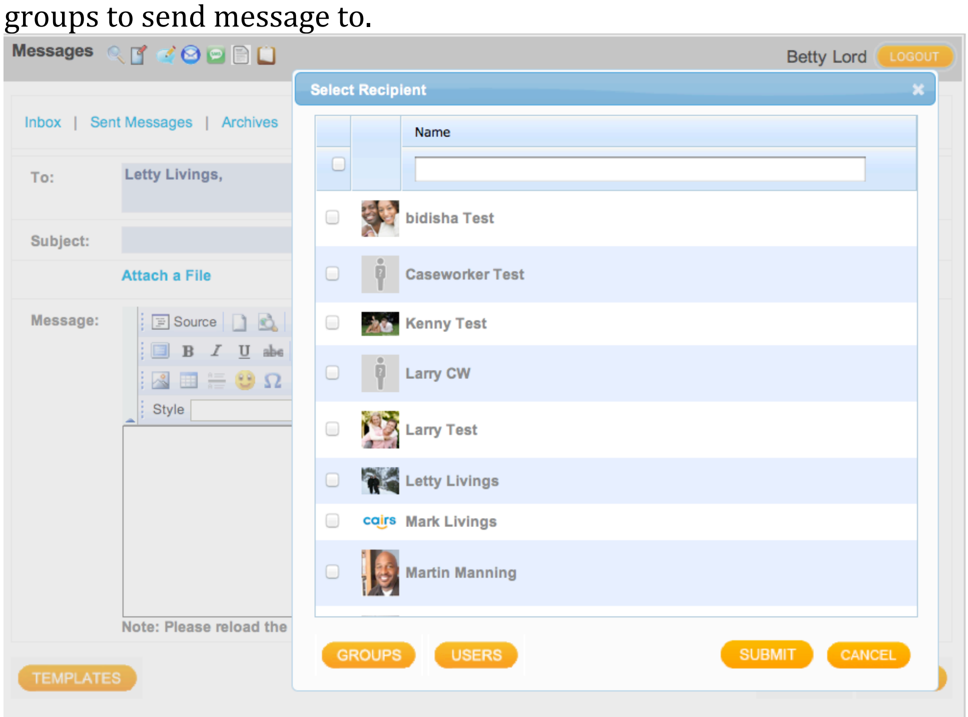
Upon selecting the blue envelope a message screen will be displayed with the clients name in the "To:" field. To add additional people to the message select the blue notebook icon located to the right of the "To:" field.

To compose messages with a template follow the steps below:

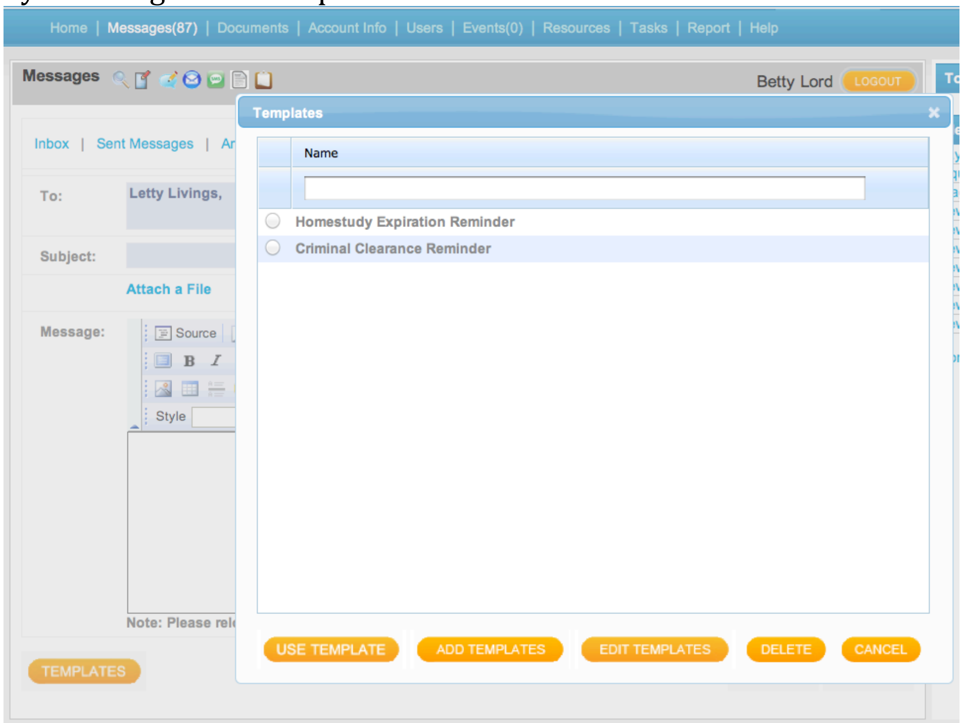
1. Select the orange template button located at the bottom left hand corner of the message window. Once selected you will be presented with the template menu of pre-defined templates.
2. Select the template you wish to use and select the orange submit button at the bottom right hand corner of the screen OR to create a new template select the create template orange button to define a new template.

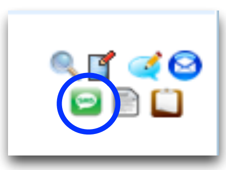


Selecting additional users to send the message to. You can select individual users or groups to send message to.



Template window to select the type of template you require or to create a new one by selecting create template.





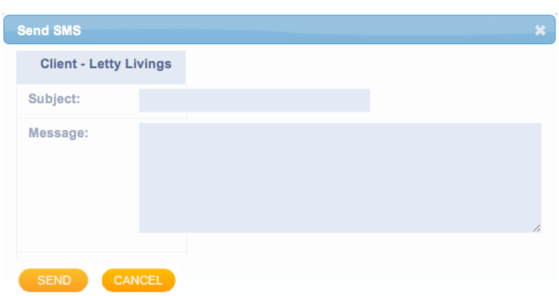
Sending a text message

Sending a text message through MAP can be accomplished by selecting the green SMS icon on the quick menu (icon circled to the left). All text messages sent through MAP will be included in casenotes for the client.

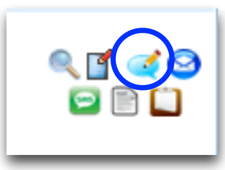
In order to send a text message, the client must have been configured with the following:

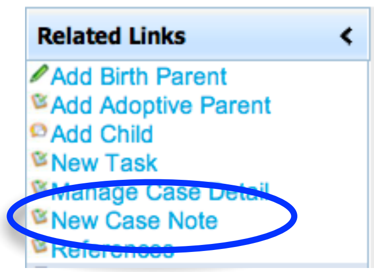
1. Enabled the SMS option in their user record
2. Entered a valid mobile number
3. Selected the correct carrier

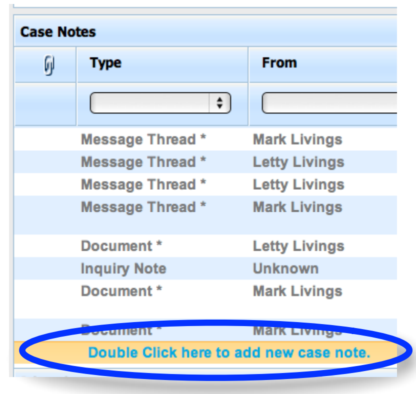
Upon selecting the green SMS icon a window is displayed to gather a subject and data you wish to send to the client. Upon sending the text message, a copy will be placed in the clients casenote section.



Creating a casenote





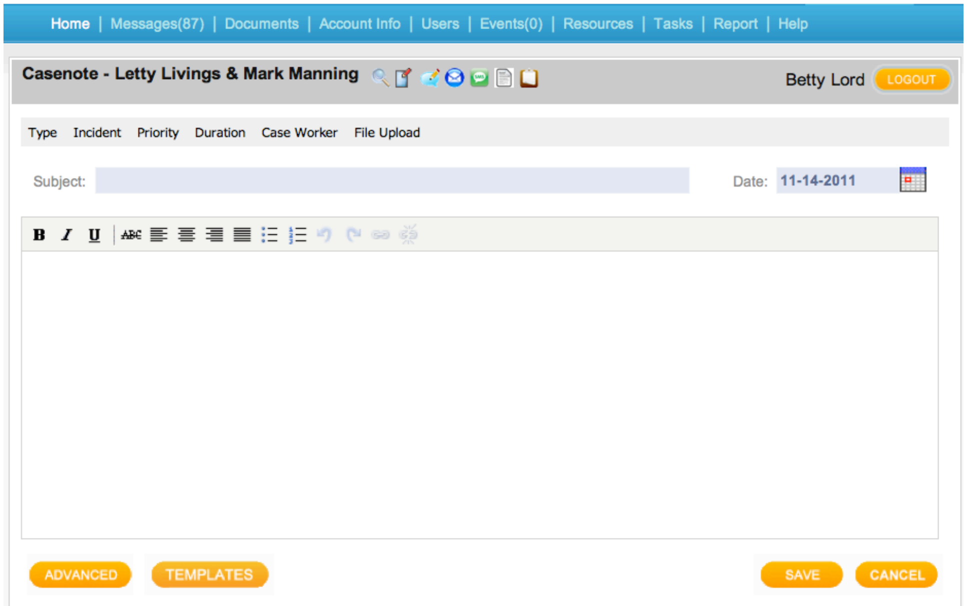


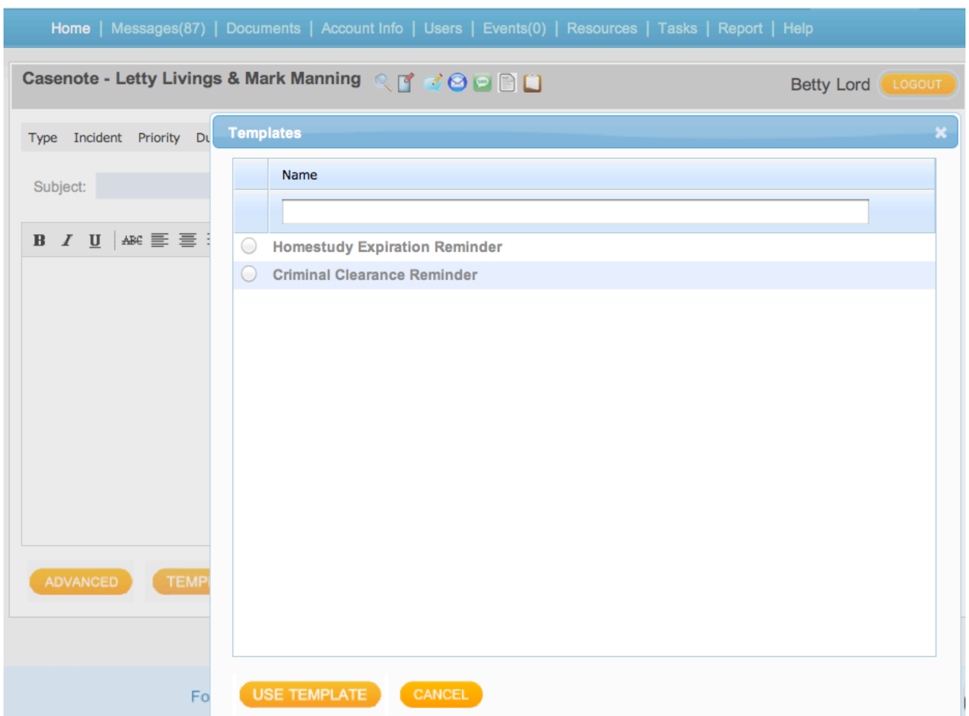
Creating a case note in MAP can be done in 3 different location including:

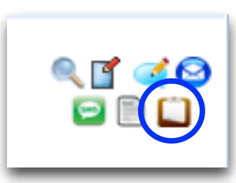
- Quick menu area
- Related links area in the clients data screen
- In the case notes section

After selecting one of case note options, a case note entry screen will be presented. The case note entry screen supports setting the following categories for the type of casenote that is being entered:

- Type of casenote
- Incident identification
- Priority
- Duration
- Caseworker
- File upload
- Standard template used for the casenote





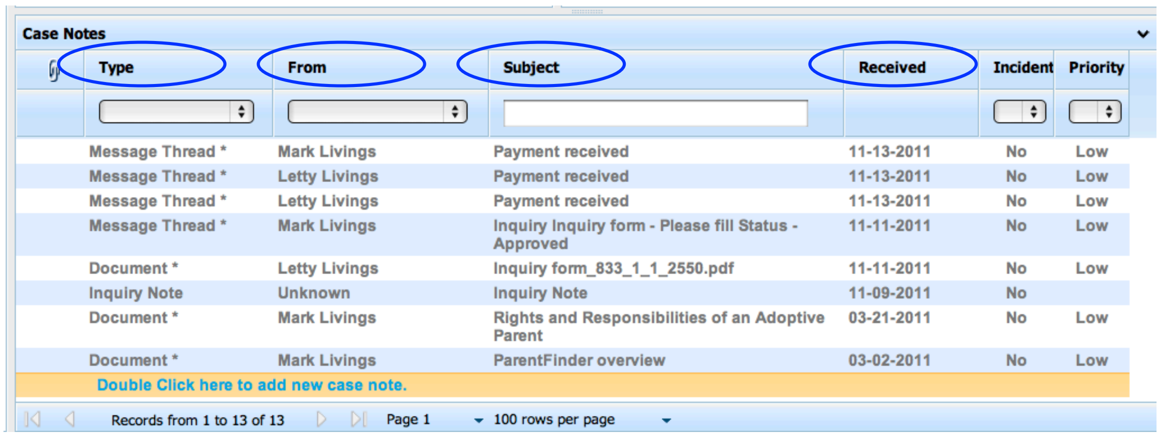


Viewing casenotes

To view a single or multiple casenotes, select the notebook icon on the quick links menu (icon circled to the left). Once the icon has been selected, the client data screen will be displayed. The casenotes are located on the bottom of the client data screen.

Casenotes can be sorted, grouped, or filtered by using the following column options:

- Type – If selected, will only show the type of casenote that has been selected
- From – If selected, will show only casenotes that are published by a specific person.
- Subject – By entering in key words, only casenotes with those keywords will be displayed.
- Received – This column can be sorted to show ascending or descending data order of casenotes.


Case Notes

Type	From	Subject	Received	Incident	Priority
Message Thread *	Mark Livings	Payment received	11-13-2011	No	Low
Message Thread *	Letty Livings	Payment received	11-13-2011	No	Low
Message Thread *	Letty Livings	Payment received	11-13-2011	No	Low
Message Thread *	Mark Livings	Inquiry Inquiry form - Please fill Status - Approved	11-11-2011	No	Low
Document *	Letty Livings	Inquiry form_833_1_1_2550.pdf	11-11-2011	No	Low
Inquiry Note	Unknown	Inquiry Note	11-09-2011	No	
Document *	Mark Livings	Rights and Responsibilities of an Adoptive Parent	03-21-2011	No	Low
Document *	Mark Livings	ParentFinder overview	03-02-2011	No	Low

Double Click here to add new case note.

Records from 1 to 13 of 13 Page 1 100 rows per page

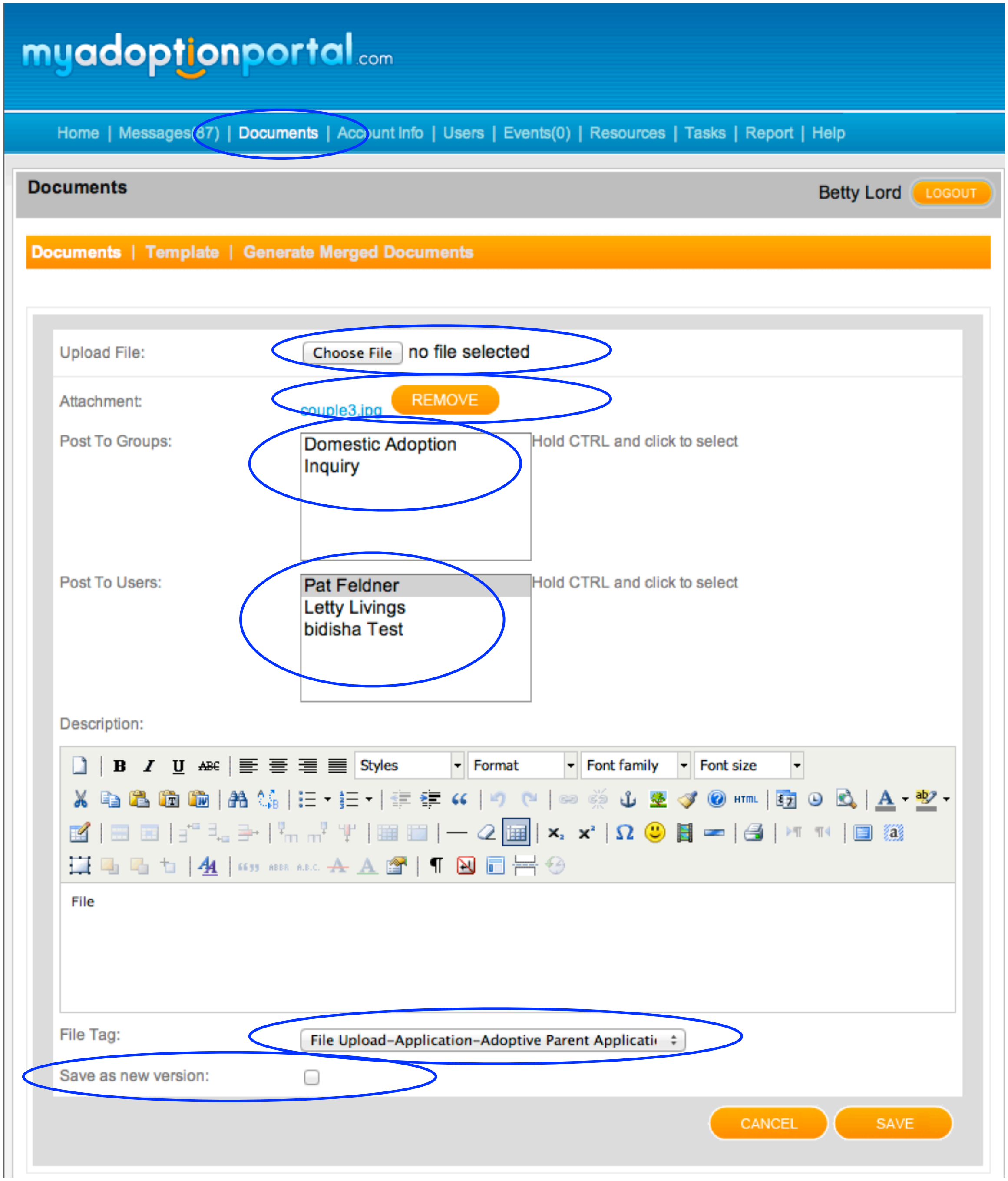
Uploading a file or document and posting a document to a single user

Uploading a document to MAP for an individual or group can be accomplished through the documents menu option. Uploading to a specific clients document area will automatically place the document in the client's casenotes.

Document can be uploaded to a group of users OR to an individual person. The file is identified / classified by the file tag located at the bottom of the file upload window. Multiple versions of documents are supported, by selecting save as new version located on the bottom of the upload screen.

To upload a document, follow the steps below:

1. Select the documents menu item
2. Select the orange upload button
3. Choose the file you are uploading
4. Select either the group or the individual you are sending the document to
5. Enter in a description for the document
6. Select if this document is a new version (optional)
7. Select the orange save button located at the bottom right of the screen



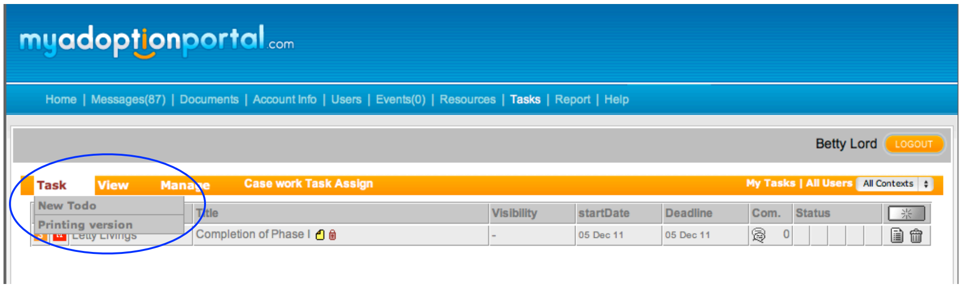
Creating a caseworker task

Creating a task for a caseworker can be accomplished through the caseworker task module. The tasks in the caseworker task system are tied directly to a client and will be displayed both in the caseworker task system and the client's data panel.

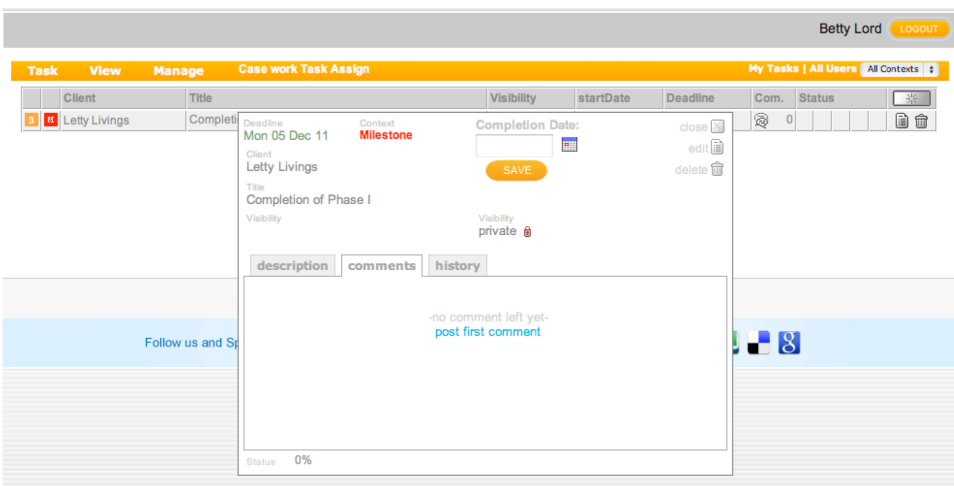
To enter task follow the steps below:

1. Select task from the top caseworker menu
2. From the task screen select Task -> New Task
3. A blank task will be shown

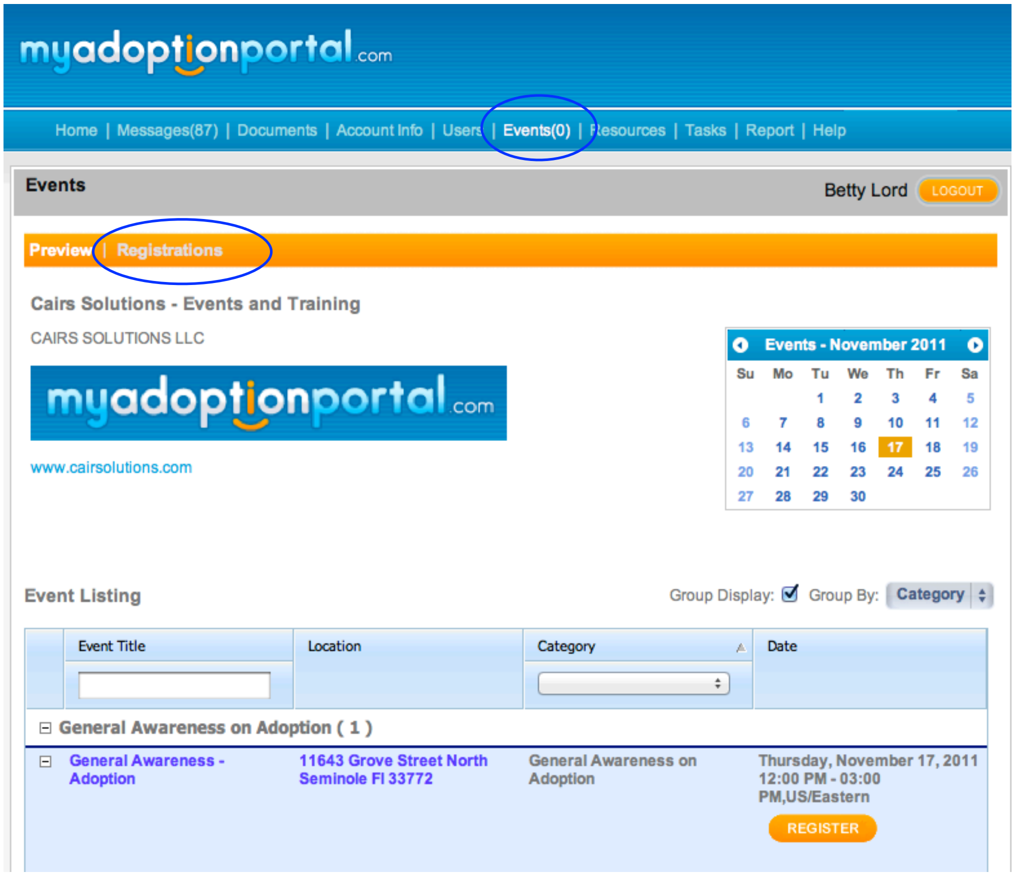
4. Enter in the information for the task including start date, end date, description, client name, priority, and type.
5. Select save

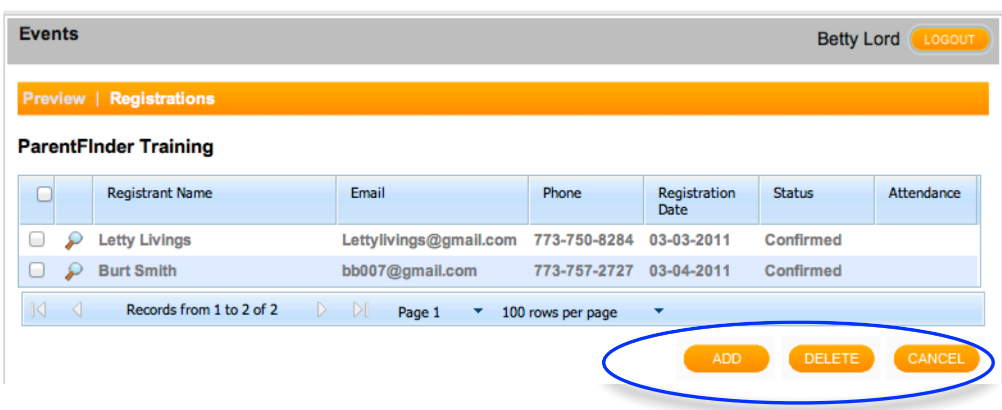


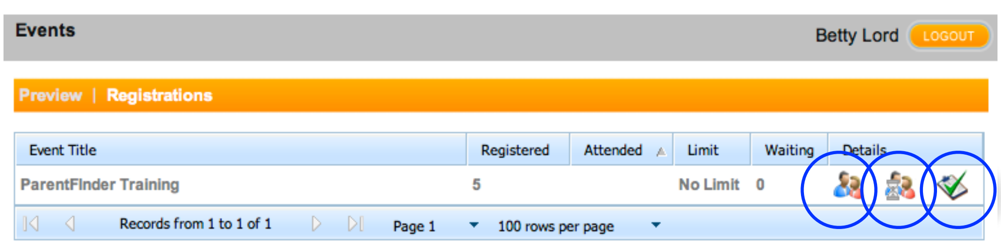
Updating caseworker tasks

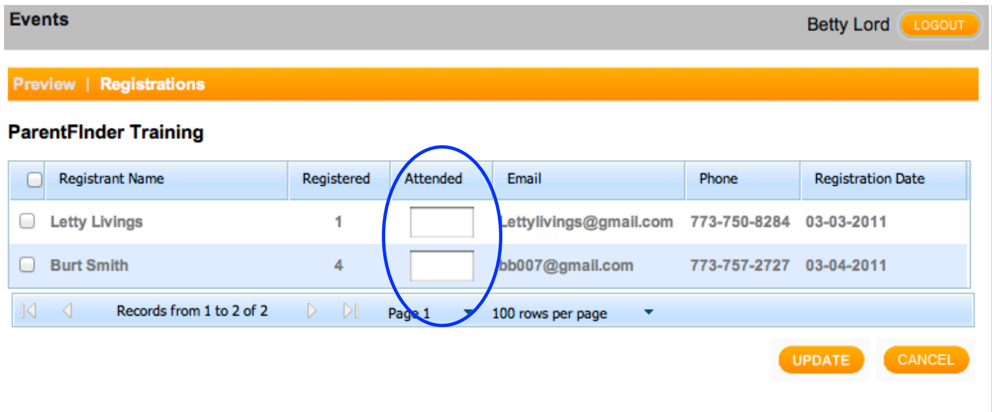


Event registrations


myadoptionportal.com
Home | Messages(87) | Documents | Account Info | Users | Events(0) | Resources | Tasks | Report | Help
Events
Betty Lord LOGOUT
Preview | Registrations
Cairs Solutions - Events and Training
CAIRS SOLUTIONS LLC
myadoptionportal.com
www.cairsolutions.com
Events - November 2011
Su Mo Tu We Th Fr Sa
1 2 3 4 5
6 7 8 9 10 11 12
13 14 15 16 17 18 19
20 21 22 23 24 25 26
27 28 29 30
Event Listing
Group Display: Group By: Category
Event Title
Location
Category
Date
General Awareness on Adoption (1)
General Awareness - Adoption
11643 Grove Street North Seminole Fl 33772
General Awareness on Adoption
Thursday, November 17, 2011 12:00 PM - 03:00 PM,US/Eastern
REGISTER


Events
Betty Lord LOGOUT
Preview | Registrations
ParentFInder Training
Registrant Name
Email
Phone
Registration Date
Status
Attendance
Letty Livings Lettylivings@gmail.com 773-750-8284 03-03-2011 Confirmed
Burt Smith bb007@gmail.com 773-757-2727 03-04-2011 Confirmed
Records from 1 to 2 of 2
Page 1
100 rows per page
ADD
DELETE
CANCEL


Events
Betty Lord LOGOUT
Preview | Registrations
Event Title
Registered
Attended
Limit
Waiting
Details
ParentFInder Training 5 No Limit 0
Records from 1 to 1 of 1
Page 1
100 rows per page



Reviewing references