



**Clients Case Management Training**  
**St. Louis, Missouri**  
**June 8 - 11, 2009**  
**Preliminary Agenda & Syllabus**

**MONDAY, JUNE 8**

TIME	GROUP SESSION	
9:00 - 9:15 AM	Setup & Introduction	
9:15 - 10:00 AM	1. A PRIME Overview - What it does, where it's stored and interactions with Access & SQL	
	THE ESSENTIALS	BEYOND THE ESSENTIALS
10:00 - 11:30 AM	2. Add Data to Case Management - What information do you need to store and where do you put it?	6. Track Customizations - Record your recent changes and figure out what was changed in the past
11:30 - 12:30 PM	<b>LUNCH</b>	
1:00 - 2:00 PM	Add Data to Case Management Cont.	7. SQL Server Engine - The workings and maintenance requirements of the database that drives the PRIME SQL version
2:00 - 2:45 PM	3. Search - Find what you added	8. Get Information In and Out - Have PRIME talk to Word, Excel, Web and XML
2:45 - 3:00 PM	<b>BREAK</b>	
3:00 - 4:00 PM	4. Intro to Reporting - Turn your Data into Useful Information	9. New Features Save Time - What the new PRIME holds and what can be added to your version without a total upgrade
4:00 - 5:00 PM	5. Basic Document Management - Letters, Intake Sheets, Calendar Schedules, Time Sheets, Brief Banks, etc. need to be organized	10. Advanced Document Management - Attach Documents to your Case while automatically creating a Brief Bank

**TUESDAY, JUNE 9**

TIME	SELECT A SESSION	
9:00 - 10:30 AM	11. PBI - Use Volunteer Attorneys & Track Their Work	16. Centralized/Coordinated Intake – Proper integration with case management is essential to make it work properly
10:30 - 11:30 AM	12. Call Back & Eligibility - Before an Applicant becomes a Client, the features of Callback and Eligibility.	17. Error Checking - Regular error checking can avoid the year-end rush. What should you check?
11:30 - 12:30 PM	<b>LUNCH</b>	
1:00 - 2:30 PM	13. Special Programs – A way to gather data funders demand and provide for custom program needs.	18. Canned Notes – Not only record what you told the client, but provide question lists, opening memos, etc.
2:30 - 2:45 PM	<b>BREAK</b>	
2:45 - 4:00 PM	14. A Day in the Life of Case Management - How PRIME fits into a typical work day	19. Upkeep - Personalize the System to fit the needs of your Office
4:00 - 5:00 PM	15. Bring Your Own Project – Wanted! A custom report or feature you need help adding to PRIME.	20. Internal/Case Collaborative Messaging – Send and store pop up messages about cases, grants, or anything else you need.

**WEDNESDAY, JUNE 10**

TIME	THE ESSENTIALS	BEYOND THE ESSENTIALS
9:00 - 11:30 AM	21. Queries - Turn Data into Knowledge	23. Queries - Queries based on Queries, Grouping, Immediate IF Statements, Cross Tab Queries, etc.
11:30 - 12:30 PM	<b>LUNCH</b>	
1:00 - 1:30 PM	Queries Cont.	Queries Cont.
1:30 - 3:00 PM	22. Reports - Make the Data Look Good	24. Reports - Grouping, Totals, Labels, and Basing Reports on Queries, etc.

3:00 - 3:15 PM	<b>BREAK</b>	
3:15 - 5:00 PM	Reports Cont.	Reports Cont.

## THURSDAY, JUNE 11

TIME	GROUP SESSION
9:00 - 10:30 AM	25. Time Keeping & Calendar Advanced
10:30 - 11:30 AM	26. Form Letters - Create, Modify, Customize, Letterheads, Generate & Schedule
11:30 - 12:30 PM	<b>LUNCH</b>
1:00 - 2:45 PM	27. The Today Screen - What's Happening in the System
2:45 - 3:00 PM	<b>BREAK</b>
3:00 - 5:00 PM	28. Over 120 Things to Understand About PRIME

### Introduction

The opening session serves as a brief introduction to the training.

#### **1. A PRIME Overview - What it does, where it's stored and interactions with Access & SQL**

From A - Agency Referrals to Z - Special Program Tables, Clients has an enormous number of features and functions. It's possible to not know a function exists or forget that it's there in the first place. This session lays out the functions and components of Clients, explains what they do, and their associated primary tables. It also covers how Access, SQL and PRIME relate to each other. The CFW User Group and the Advisory Group will also be covered.

#### **2. Add Data to Case Management - What information do you need to store and where do you put it**

Case Management gathers a large amount of information. This session will show the different ways that this information is gathered. Learn how to add information and use the features on the intake sheets. Learn how to manage your cases, time, and schedule events.

#### **3. Search - Find what you added**

Search Screens are the most used feature in Clients Case Management. Learn how to use these screens to find a client, a group of clients, a time slip or any other record you need. The Search screens have become so powerful that they also act as mini-report writers.

#### **4. Intro to Reporting - Turn your Data into Useful Information**

Raw lists of clients aren't of much use. Learn about the vast number of ways you can change the data into information that you can use to manage your caseload.

#### **5. Basic Document Management - Letters, Intake Sheets, Calendar Schedules, Time Sheets, Brief Banks, etc. need to be organized**

Generating form letters and document tracking are both possible inside case management. Learn where and how to perform these functions.

#### **6. Track Customizations - Record your recent changes and figure out what was changed in the past**

Often we fail to document the changes or don't know the best way to document them. This session shows how to document changes AND how to figure out what changes have already been made and not documented.

#### **7. SQL Server Engine - The workings and maintenance requirements of the database that drives the PRIME SQL version**

The industrial strength Edition of Clients uses Microsoft SQL Client Server Database. Learn how to maintain, manage, and modify SQL in both the SQL and ASP/SQL Editions.

#### **8. Get Information In and Out - Have PRIME talk to Word, Excel, Web and XML**

There is an increasing need to get information out of Case Management and into other formats. This will explore some of those needs and the solutions.

#### **9. New Features Save Time - What the new PRIME holds and what can be added to your version without a total upgrade**

Conflict PopUp, Report Criteria Save, Report Preview, One Step Six Calendar Slips, Closing Form, Pop Up Eligibility Notes on Search, Search Modification PopUp, Batch Time Case Time Update, etc. There are many new

changes in the latest version of PRIME. *Many of these changes can be added to existing systems without a total upgrade.* This session explores those changes.

**10. Advanced Document Management - Attach Documents to your Case while automatically creating a Brief Bank**

People want to attach documents, photos, scans, etc. to their cases. They also want to have a brief bank. This session shows how PRIME accomplishes this.

**11. PBI - Use Volunteer Attorneys & Track Their Work**

Coordinating both low fee and free panels of private attorneys can be a handful. Learn how to use case management to track the cases of volunteer and paid (judicare) lawyers. See how the system will keep track of bills from compensated lawyers and payments made to them.

**12. Call Back & Eligibility - Before an Applicant becomes a Client, the features of Callback and Eligibility**

Before a person becomes a client, they go through the Callback and Eligibility slips. Often people don't understand the uses or possibilities of each form. The LSC requirement to track *Unable to Serve or Unable to Serve Fully* will also be covered.

**13. Special Programs – A way to gather data funders demand and provide for custom program needs.**

One of the most powerful features in the system is the ability to develop your own custom intake sheets to gather information you need and report on it. Get the extra data you need.

**14. A Day in the Life of Case Management - How PRIME fits into a typical work day**

How does Clients actually work in an office? How and what do programs use on a day-to-day basis? Are there features and functions that you aren't using that can improve the quality and quantity of representation provided to our clients? Are there ways to use these features that are more efficient and effective? Learn in one hour how to best use the system during a normal workday.

**15. Bring Your Own Project – Wanted! A custom report or feature you need help adding to PRIME.**

Bring a project, report or problem from your office and get help on it.

**16. Centralized/Coordinated Intake – Proper integration with case management is essential to make it work properly**

Centralized /coordinated intake means that the person doing the initial contact with the client will probably not be the one handling the case. Learn how to use PRIME to transfer cases and track who has responsibility for the case. Internal / Case Collaborative messaging becomes even more important.

**17. Error Checking - Regular error checking can avoid the year-end rush. What should you check?**

Information is only as good as the data it comes from. Insure that your case management reflects reality. Learn how the person responsible for case management can check accuracy and run error-checking reports to find the errors in data. Duplicate Cases, Nth Case Selections and CSR Changes will also be covered.

**18. Canned Notes – Not only record what you told the client, but provide question lists, opening memos, etc.**

Canned notes can be used to track what you told the client, provide a simple interview system and provide program-required information. This session will cover their uses.

**19. Upkeep - Personalize the System to fit the needs of your Office**

The Upkeep Tab is where many modifications and changes to the system are made. These changes include adding records, such as funding codes, controlling security, such as passwords, and setting many options in the program.

**20. Internal/Case Collaborative Messaging – Send and store pop up messages about cases, grants, or anything else you need.**

Being able to communicate about cases and have that information stored with the case is greatly appreciated by staff. Messages that pop up and let you know that you've got something are also useful. This session shows how to use these features.

## **21. Queries - Turn Data into Knowledge**

Use Queries to turn data into information you can act on.

## **22. Reports - Make the Data Look Good**

One of the main differences between organizations is the reports that are needed. Learn how reports differentiate from queries and how to create the ones your organization needs.

## **23. Queries - Queries based on Queries, Grouping, Immediate IF Statements, Cross Tab Queries, etc.**

Use Queries to turn data into information you can act on. Action queries, such as Append and Update, are extremely powerful tools. Queries based on queries allow the creation of very complex reports. 'Make Table' Queries can preserve information or combine it for other applications or uses. The 'Immediate IF' function can create reports that otherwise seem impossible.

## **24. Reports - Grouping, Totals, Labels, and Basing Reports on Queries, etc.**

In this advanced session, you will spend more time on the presentation of your basic report, along with tricks you can utilize from within Access.

## **25. Time Keeping & Calendar Advanced**

Time Keeping is required for LSC Programs. Are you aware of the four different forms that allow this information to be gathered? Do you know what reports on time can be easily generated. The calendar schedules what you do. Do you know how to use it and the multiple places it can be modified? How does it relate to the critical date field and the To Do List?

## **26. Form Letters - Create, Modify, Customize, Letterheads, Generate & Schedule**

People want to not only send letters, but also modify how they look and the letterhead. This explores how to make these changes.

## **27. The Today Screen - What's Happening in the System**

The Today Screen is almost a separate interface to your data, allowing you to quickly get to the things you need. It has many functions built in, such as open cases, an Outlook view of the Calendar, frequent reports, a quick way to get to project management, and the tickle system.

## **28. Over 120 Things to Understand About PRIME120**

The article, "Things You Didn't Know You Could Do with Case Management", is an extremely detailed look at the functions in the system. By using the article as a roadmap, we can cover areas of interest not otherwise covered in the training and review the areas that were covered.