August 2010

SEARCH TOOLS

INDEX:

- A. Search for Resource ID# in Resource Search.
- **B.** Search for Client/Child in Person Search.
- C. Search for Placement and Payment of Care for Child.
- **D.** Search for Eligibility of Care for Child.
- E. Search for Legal Status
- **F.** Search for Citizenship
- G. Search for Foster Care/Relative/RBWO child when not found in Person Search.
- H. Search for Placement Resource when not found in Resource Search.
- I. Search for a Service Authorization.
- **J.** Search for a Contract.
- K. Search for Case Manager

Notes:

August 2010

A. Search for Resource ID

1. Click on Resource Tab \rightarrow Resource Search

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- 2. Enter last Name, first name, partial name, Resource ID or other criteria.
- 3. Click on SEARCH button and scroll down for Search Results.

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4. Click on Resource hyperlink \rightarrow Resource Detail Page

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Page 4

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5. Check for SMILE vendor ID under Address List.

SHINES FINANCIAL TRAINING SHINES Search Tools **B. Search for Client/Child**

August 2010

- 1. Click on SEARCH \rightarrow Person Search \rightarrow Person Search Page
 - a. Select from Person Information Search if using name
 - b. Can use Person ID, SSN, other criteria
 - c. Click Search Button

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d. Scroll down for Search Results

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e. Click on hyperlink Name \rightarrow Person Detail Page

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f. Use bar across bottom of screen and scroll over to find Client/Child's Person ID#

Page 7

1. Click on SEARCH \rightarrow Person Search \rightarrow Person Search Page

- 2. Complete Search for Client/Child (Section B, Steps 1-3)
- 3. Click on hyperlink Name \rightarrow Person Detail Page
 - a. Go to Current Stage Section
 - b. Click View Options drop down menu
 - c. Select View Placement Events

NOTE: If there is not Placement Events option, this is the wrong Person ID.

4. Click on Search

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5. View Placement of Child

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- 6. Check that the latest placement is approved (APRV).7. Click on last Placement hyperlink.

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8. Check Placement and Resource ID under Placement Name section.

NOTE: When trying to view a placement and a "System Error" appears on the screen, the problem is a "bug" in the system when a Person Merge was performed. Do the following:

- a. Go to Current Stage Section
- b. Click View Options drop down menu
- c. Select View Case List
- d. Click on the Case Id hyperlink
- e. Find the person name and should be in FCC stage
- f. The Placement and Eligibility tabs will be available for viewing.

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9. Click on Payment of Care tab.

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- 10. Check that the Payment of Care is Approved (APRV).
- 11. Click on latest Payment of Care hyperlink.

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* Start Date: 12/12/1912	
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- 12. Check that the Payment of Care Type agrees with paper invoice.
- 13. Check the start date cannot be after the days on the invoice.
- 14. Check rates against rate on paper invoice. This could change after the SMILE invoice was generated.
- 15. Check all information under Payment of Care Detail section.

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D. Search for Eligibility of Care for Child

- 1. Click on SEARCH \rightarrow Person Search \rightarrow Person Search Page
- 2. Complete Search for Client/Child (Section B, Steps 1-3)
- 3. Click on hyperlink Name \rightarrow Person Detail Page
- 4. Current Stage section → Placements Event List → Placement Detail Page
- 5. Click on Foster Care Eligibility tab

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- 6. Click on Foster care Eligibility hyperlink.
- 7. If Eligibility has not been updated or is blank, the child should be in initial funding.
- 8. Rev Max should enter the child's eligibility with 45 days, either IV-E or IV-B.

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Child Support Referra	al						
O Yes O No ↓	Is this child being referred to	child support					
Date of Referral:							
± Comments:					4		
							-
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This child has not had an eligibility determination completed on him.

Page 13

August 2010

E. Search for Legal Status

1. Click – Search Tab \rightarrow Person Search

My Tasks Case Searc	n Intake	Financial	Reports	Resources
Person Resource F/A Home Staff Contract C	n-Call Case			
	Person Sea	ch	‡ co	onditionally required field
Person Information				
Person Information Search: Phonetic	*			
‡ Last:	First		Middle:	
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Address				
Address Search				
‡ Street:			County:	~
City:	State:	Georgia 👻	Zip:	-
Additional Parameters				
Additional Parameters Search				
± SSN:	‡ Person ID:		‡ Phone:	
‡ CRS or Medicaid/MHN Number:	‡ Intake Report ID:			
				Search
				1

- 2. Type PID #
- 3. Click Search

	Person Search										
Person Inform	nation										
Person Informa	tion Search: F	honetic	~								
‡ Last:			First					Middle:			
‡ Date of Birth:		•	Age:					Gender:		~	
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Additional Pa	rameters										
Additional F	Parameters Search	1									
‡ SSN:]	‡ Per	son ID:	ŀ	10422753		‡ Phone:			
‡ CRS or Medicaid/MHN Number:			‡ Inta	ke Repoi	t ID:						
									I	Search	
								S	croll for more i	nformation>	
Match	Match Name	Alert	Score	Mrg	Age	Gender	Race/E	thnicity		Person ID	
PARA	Brown, Gregory V		100	~	18	М	Black (n	on-Hispani	ic)	10422753	

- 4. Click hyperlink name \rightarrow Person Detail Page
- 5. Go to Current Stage Section

Demographics	10015			August 20
* Gender:	Male 🗸	± Marital:	Single, Never Married 🗸	
Title:	~	Maiden Name:		
± DOB:	01/14/1992	Age:	18 Approximate	
Language:	Enalish 🗸	- Living Arrangement:	Group Home/Institution-under DFCS Supervision	
Occupation:		Religion:	×	
‡ DOD:		‡ Reason For Death	n:	
Additional Comments:				
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Type:	~	Role: Relation	nship:	
Reporter Legal C	ustodian 🔲 Safety R	esource 🔲 Member o	of Resource's Household 🔲 Paternity Established 🗌 Verified	t
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c. Click on search \rightarrow Event List

6. Check the latest hyperlink Legal Status the following details will be shown

		# Subr	nitted Events			
					Scroll for more info	ormation>
Date Entered	Status	Туре	Description	Stage	Stage Name	Cas
01/27/2010	COMP	Legal Status	Temporary Voluntary 01/14/2010	FCC	Brown, Gregory V	104
07/20/2009	COMP	Legal Status	Temporary Court 07/16/2009	FCC	Brown, Gregory V	104

- a. Legal Status = Temporary Voluntary 01/14/2010
- b. Legal County
- c. Status Effective date
- d. Court Order Expiration Date of Order

F. Search for Citizenship

August 2010

7. Click – Search Tab \rightarrow Person Search

My Tasks Case	Search	Intake	Financial	Reports	Resources
Person Resource F/A Home St	aff Contract On-Call	Case			
	I	^p erson Search		:	conditionally required fie
Person Information					
Person Information Search: Pho	netic 🗸 🗸				
‡ Last:	First			Middle:	
‡ Date of Birth:	Age:			Gender:	*
Address					
Address Search					
‡ Street:				County:	*
City:	State:	Geo	orgia	V Zip:	-
Additional Parameters					
Additional Parameters Search					
‡ SSN:	‡ Pers	ion ID:		‡ Phone:	
‡ CRS or Medicaid/MHN Number:	‡ Intak	e Report ID:			
					Search

- 8. Type PID #
- 9. Click Search \rightarrow Person Detail Page

	Person Search									‡ conditionally required field
Person Inform	nation									
Person Informa	ation Search:	Phonetic		~						
‡ Last:				First:		[Middle:	
‡ Date of Birth:				Age:		[Gender:	~
Address										
Address S	earch									
‡ Street:									County:	*
City:				State:		[Georgia	*	Zip:	-
Additional Pa	arameters									
Additional	Parameters Sea	arch								
‡ SSN:				‡ Perso	on ID:	-	10422753		‡ Phone:	
‡ CRS or Medicaid/MHN Number:				‡ Intake	e Report	ID:				
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									s	croll for more information>
Match	Match Name	A	Alert S	Score	Mrg	Age	Gender	Race/Et	thnicity	Person ID
PARA	Brown, Gregory	V	1	00	•	18	М	Black (n	on-Hispani	c) 10422753

- 10. Click hyperlink name
- 11. Go to Current Stage Section

1h

NES Search	Tools			August 20
Demographics				
* Gender:	Male 😽	‡ Marital:	Single, Never Married 🐱	
Title:	~	Maiden Name:		
‡ DOB:	01/14/1992	Age:	18 Approximate	
Language:	English 🗸	Living Arrangement:	Group Home/Institution-under DFCS Supervision 💌	
Occupation:		Religion:	×	
‡ DOD:		‡ Reason For Death:	~	
Additional Comments:				
Current Stage				
Туре:	~	Role: Relations	hip:	
Reporter Legal	Custodian 🔲 Safety Re	source 🔲 Member of F	Resource's Household 🔲 Paternity Established 🔲 Verified	
View Options:			Search	
Caregiver/Parental R	elationship Informatio	n for Child		
Putative Eather:			v	

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- a. Click View Options drop down menu
- b. Select View Placement Events

Demographics			
* Gender:	Male 🗸	‡ Marital:	Single, Never Married 🐱
Title:	*	Maiden Name:	
‡ DOB:	01/14/1992	Age:	18 Approximate
Language:	English 🗸	Living Arrangement:	Group Home/Institution-under DFCS Supervision 👻
Occupation:		Religion:	×
‡ DOD:		‡ Reason For Death:	~
Additional Comments:			< ×
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Туре:	\sim	Role: Relationsh	nip: 🗸 🗸
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View Options:	View Placement Events		Search
Caregiver/Parental R	elationship Information	n for Child	
vii			

c. Click on search \rightarrow Event List

			# Subr	nitted Events		
					Scroll for more info	ormation>
Date Entered	Status	Туре	Description	Stage	Stage Name	Case
06/08/2010	COMP	Placement	Start Date05/21/2010 Chris Kids - S CCI	FCC	Brown, Gregory V	104(
09/16/2009	APRV	Placement	Start Date09/16/2009 End Date 05/21/2010 Chris Kids - D GRH	FCC	Brown,Gregory V	104(
08/21/2009	APRV	<u>Placement</u>	Start Date07/16/2009 End Date 09/16/2009 Athens-Clarke OTR	FCC	Brown, Gregory V	104(

d. Click Hyperlink for current placement \rightarrow Placement Information

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SHINES FINANCIAL TRAINING

earch Too	ols				
Case	Search	Intake	Financial	Reports	Resources
Contacts/ Service Summaries	ice orization Legal F	Child Placement	History Foster Care Eligibility	e Case Management	
cements for Case	Payment of Care	Relative Care Assess	ment		
own,Gregory V 403255	Ρ	lacement Informat	ion	‡ cor	* required field iditionally required field
				Expa	and All Collapse All
05/21/2010	* Time:	03:00 PM	× Actual/Attemp	ted:	Actual 🗸
Child Care Institu	tion 🗸				
Gill,Amanda		* Method:	Announced Fa	ce to Face	~
Temporary Placen	nent Type:			\checkmark	
	earch Too Case	case Search Case Search Contacts/ Summaries Service Authorization Legal ¢ cements for Case Payment of Care own,Gregory V P 05/21/2010 * Time: Child Care Institution Image: Child Care Institution Gill,Amanda Temporary Placement Type: Image: Child Care Institution Image: Child Care Institution	Case Search Intake Contacts/ Summaries Service Authorization Legal Child Placement cements for Case Payment of Care Relative Care Assess own,Gregory V 403255 Placement Informat 05/21/2010 * Time: 03:00 PM Child Care Institution Image: Child Care Institution * Method: Temporary Placement Type: Image: Care Care Care Care Care Care Care Care	Case Search Intake Financial Contacts/ Summaries Service Authorization Legal Child Plans Placement History Foster Care Eligibility cements for Case Payment of Care Relative Care Assessment own,Gregory V Placement Information 05/21/2010 * Time: 03:00 PM v * Actual/Attemp Child Care Institution v Gill,Amanda * Method: Announced Fa Temporary Placement Type: v v V	Case Search Intake Financial Reports Contacts/ Summaries Service Authorization Legal Child Plans Placement History Foster Care Eligibility Case Management cements for Case Payment of Care Relative Care Assessment Management own,Gregory V Placement Information ‡ cor 05/21/2010 * Time: 03:00 PM © * Actual/Attempted: Child Care Institution © Gill,Amanda * Method: Announced Face to Face Temporary Placement Type: Imagement Type: Imagement Type: Imagement Type: Imagement Type:

2. Go to second level Tabs click on Person \rightarrow Person List

se Name: Favors, age Name: Brown,	Latracie E Gregory V				Perso	n List			# Rep
Name	Merge	Search	Age	Gender	Туре	Role	Rel/Int	Special Rel	Person ID
Brown, Gregory V	Y	۷	18	М	PRN	PC	Self		10422753
Favors,Rodariou	Ν	۷	17	М	PRN	NO	Other Non-Related Person		10400176
Roberts,Arthur	N	V	35	М	PRN	NO	Aunt/uncle		16899566
Favors,Latracie E	Ν	۷	42	F	PRN	NO	Primary Caretaker		10400485
Brown,Gregory V	N	V	45	М	PRN	NO	Legal Father		11302320
Roberts,Brenda G	Ν	۷	49	F	PRN	NO	Absent Parent		11302338
Baker Ebony	N	V		F	COL	NO	Case Manager		17065501

a. Click Hyperlink for child's name \rightarrow Person List

Summary Person S	contacts/ Service summaries Authorization	Legal Child Placem	ent History Foster Care Case Eligibility Manage	ment
Person Detail Records	Check Citizenship and Ide	entity Health Log Child	fren 1st Diligent Search Youth Def	ail Restricted Funds
Name: Brown Person ID: 104227	,Gregory V 53	Person Deta	ail	* required field ‡ conditionally required field
				Expand All Collapse All
Person Name				
‡ First: Gregory	Middle: Von	‡ Last	Brown	Suffix: Junior 🔽
Demographics				
* Gender:	Male 🗸	‡ Marital:	Single, Never Married 😪	
Title:	*	Maiden Name:		
‡ DOB:	01/14/1992	Age:	18 Approximate	
Language:	English 🗸	Living Arrangement:	Group Home/Institution-under DFC	S Supervision 😽
Occupation:		Religion:	~	

3. Click on 3^{rd} Level Tabs \rightarrow Citizenship and Identity

SHINES S	Search Tools				
Summary 1	' Summaries ' Authoriza	tion ' T ? ' Plans ' ' ' Plans '	Eligibility	' Management	
Person Detail Rec	ords Check Citizenship ar	d Identity Health Log Chil	dren 1st Diligent Search	Youth Detail Restric	ted Funds
Name: B Person ID: 1	rown,Gregory V 0422753	Citizenship and	Identity	‡ condit	* required field onally required field
Birth Information	I				
‡ US Birth State:	Georgia	🔺 ‡ Birth County:	Clarke	~	
‡ Birth City:		‡ Out of State Co	unty:		
* Citizenship/Alien Status:	US Citizen	Birth Country:	United Sta Born	ates 🗸 🗸	Non-US
‡ Entry Date into the	e US:	‡ Mother Married Birth:	at Child's Unknown	~	
DOB:	01/14/1992	Age:	18		
Method of Age V	erification				
US Birth Cert	ificate		Hospital Certificate		
Baptismal Ce	ertificate		Naturalization/Citizenship	Certificate	
Birth Certifica	ate (Foreign)		Permanent Resident Car	d	
Evaluative Co	onclusion		Passport (US)		
Method of Citize	nshin Verification				

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- a. Birth State & City & County
- b. Citizenship/Alien Status
- c. Method of Age Verification
- d. Method of Citizenship Verification
- e. Identity Verification (Adult)
- f. Identity Verification (Under 16 Only)
- g. Permanent Resident/Refugee
- h. Other Qualified Alien
- i. Undetermined / Other Status

G. Search for a Foster Care/Relative/RBWO child when not found in Person Search.

9. Click on Resource Tab \rightarrow Resource Search

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Resource Search			
	Resource Search	‡ conditionally required field	
Resource Details			
When conducting a resource search, one of the follow	ing must be entered: Resource Type, Resource N	eme, Identification Number, or Service.	
‡ Resource Type:	💌 🛨 🛨 🛨 🛨		
‡ Identification Number:	Program:	*	
Category:	the service:	×	
Location/Area Served			
● Location ○ Area Served ○ Proximity	‡ Proximity Rang	je(miles): 30 💌	
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A W Smith Sporting Goods	125774	Active	0.0	Provider						
A.W. Smith Sporting Goods	144376	Active	0.0	Provider						
City Of Smithville	121897	Active	0.0	Provider						
Davis, Marilyn Or Smith, Alcav	127169	Active	0.0	Provider						
Early Locksmith Service	122390	Active	0.0	Provider						
Eula B Smith	129408	Active	0.0	Provider						
Georgia Smith	118305	Active	0.0	Provider						
Hazel Smith	130553	Active	0.0	Provider						_
Jacob G. Smith Elementary	116149	Active	0.0	School			-			
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- 11. Click on Resource hyperlink \rightarrow Resource Detail Page.
- 12. Click on Placement Provider Detail tab.
- 13. Click on Placement Log tab.
- 14. Search for child and Person ID in list of children placed with provider.

E. Search for Placement Resource when the resource is not found in Resource Search.

- 1. Click on SEARCH \rightarrow Person Search \rightarrow Person Search Page
- 2. Complete Search for Client/Child
- 3. Click on hyperlink Name \rightarrow Person Detail Page
 - a. Go to Current Stage Section
 - b. Click View Options drop down menu
 - c. Select View Placement Events

NOTE: If there is not Placement Events option, this is the wrong Person ID.

4. Click on Search

SHINES Sear	ch Tools	August 2010
🚰 Person Detail - Microso	ft Internet Explorer	X
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Occupation:	Religion:	<u> </u>
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Additional Comments:	×	
Current Stage		
Туре:	Role: Relationship:	
□ Reporter □ Legal Custodian	Safety Resource Household Paternity Certified Resource Member Established	
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Other Relationship Inf	formation	
Secondary Caregiver:	×	
Putative Father:		
Legal Father:	Y	
Biological Father:	Y	
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Date Entered	Status	Туре	Description	Stage	Stage Name	Cas		
06/13/2007	APRV	<u>Placement</u>	Start Date 06/13/2007 Kids Of The King GRH	FCC	Ferguson,Daevon	850		
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- 5. Click on Placement hyperlink.
- 6. Check that the latest placement is approved (APRV).
- 7. Click on last Placement hyperlink.

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Placement Information - Mi	icrosoft Internet Explorer					_ 8 ×
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Case Person Contacts Summary Person Summar	s/ Service ries Authorization Legal Chi Pla	ld Placement Hist	_{ory} Foster Care Case Eligibility Managem	ent		
Placement Info Placements f	or Case Payment of Care Re	ative Care Assessmen	t			
Stage Name: Ferguson,Dae Case ID: 8501165	evon Plac	ement Information		* required field ‡ conditionally required field		
				Expand All Collapse All		
Placement Detail						
* Start Date/Attempted 06/13/20 Date:	007 * Time:	12:00 AM 💌	* Actual/Attempted:	Actual		
* Placement Type: Group H	Home 💌					
Contacted By: User,Co	nversi	* Method:	PHN	~		
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5. Check Placement and Resource ID under Placement Name section.

L. Search for Service Authorization

- 1. Click on SEARCH \rightarrow Person Search \rightarrow Person Search Page
 - b. Select from Person Information Search if using name
 - c. Can use Person ID, SSN, other criteria
 - d. Click Search Button

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e. Scroll down for Search Results

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f. Click on hyperlink Name \rightarrow Person Detail Page

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* Gender: Female 💌	t Marital: Married		
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‡ DOB: 04/19/1964	Age: 43	Approximate	
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g. Use bar across bottom of screen and scroll over to note Client/Child's Person ID#.

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- h. Scroll down the Person Detail Page to the Current Stage section.
- i. Click on View Options drop down menu.

🖓 Person Detail - Microsoft Internet	t Explorer	_ 8 ×
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- j. Select View Case List.
- k. Click Search.
- l. View Case List page.
- m. Click on Case ID hyperlink.
- n. View Case Summary page
- o. Click radio button next to the name that has Service Authorization.
- p. Click the Select Stage button
- q. On the Case Summary page reloaded, click the Service Authorization tab on second level.
- r. View the Service Authorization List page.
- s. Click on Service Authorization hyperlink listing the provider authorized for services.
- t. On the Service Authorization, check the Services Detail List for more information on the services authorization.

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Tip A Service Authorization can be for many persons in the same case for multiple services with the one (1) provider. An invoice will be generated for each person on the SA.

If Service Authorization is not shown for person in the search, click on Service Authorization for Case. Will show all Service Authorizations for everyone that is part of the case/

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M. Search for Contract and Contract Services

- 1. Financial tab \rightarrow Contracts tab
- 2. Contract Search Page

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- 3. Enter Resource ID
- 4. Click Search
- 5. On Search Results, click on Resource Name
- 6. IF more than one contract, view each one.

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7. View Contract Header page.

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- 1. Click on Contract Period List section.
- 2. Review the dates of the Period, look for future dates or early ending dates.
- 3. Click on last period's radio button.
- 4. Click Select Period button.
- 5. Go to Contract Version Section.
- 6. Review the dates of the Version, look for future dates or early ending dates.
- 7. Click the radio button next to the 1st version on list. (This is the last version added.)
- 8. Click the Services button.
- 9. This will show the Contract Services list.
- 10. At the Contract Header page, click the radio button next to the new version.
- 11.Click the Services button.
- 12. This shows all services that have been added to this contract.
- 13. To find which regions are included to use the contract, click on the number next to the services, such as:

<u>1</u> 5001

- 14. This will show the Contract Service Detail for that service.
- 15. Counties shown should include counties already in the contract with a checkmark. All counties should have a check mark; if not then it needs to be added in a Contract Revision.
- 16. Continue for all services listed.
- 17. Check the rates

K. Search for Caseworker in SHINES

- 1. Go to SHINES
- 2. Click On Search Tab
- 3. Click on the Person Search Tab

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- 4. Enter the Client ID
- 5. Click on Search \rightarrow Person Search

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PARA <u>Myers,Deondre</u> 100 16 M Black (non-Hispanic)								

6. Click on Hyperlink of Child's Name \rightarrow Person Detail

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				Expand All Collapse All			
Person Name							
‡ First: Deondre	Middle:	‡ Last:	Myers	Suffix:			
Demographics							
* Gender:	Male 😽	‡ Marital:	Single, Never Married 🐱				
Title:	*	Maiden Name:					
‡ DOB:	02/28/1994	Age:	16 Approximate				
Language:	English 🗸	Living Arrangement:	DFCS Family Foster Home	*			
Occupation:		Religion:	~				
‡ DOD:		‡ Reason For Death:	~				
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View Options:			Search				
Caregiver/Parental Relationship Information for Child							

- 7. Scroll down to Current Stage Field
- 8. Go to View Options
- 9. Using the Drop Down Box Choose Case List

Attention:

SHINES FINANCIAL TRAINING **SHINES Search Tools**

August 2010



Copy ! UTC Case ID Case Name Mrg Status Date 🔻 Stage 🔻 County Region Case Mgr 🔻 16886247 Whitehead,Deonna OPN 06/16/2010 Foster Care Family Cherokee Region 17 Phillips,Marissa

- 11. On this page you can see the:
 - a. Case ID
 - b. Case Name
 - c. Case Status
 - d. Case Stage
 - e. Case County
 - f. Case Region
 - g. Case Manager

12. This gives you the case manager's name to whom you need to contact.