CASEWORTHY PROFESSIONAL SERVICES ORDER FORM AND SOW

CaseWorthy Reference No.: NUECES092019
Order Form and Statement of Work for CaseWorthy Application(s) Professional Services

Between
CaseWorthy, Inc.
3995 South 700 East, Suite 420
Salt Lake City, UT 84107 ("CaseWorthy")
And
Nueces County
602 N Staples, Suite 180
Corpus Christi, TX 78401 ("Customer")

1. ORDER FORM AND AGREEMENT(S): This Order Form and Statement of Work (hereinafter "Order Form" and/or "SOW") as issued by CaseWorthy is an offer by CaseWorthy. When signed and returned to CaseWorthy by Customer on or prior to the offer expiration date, it becomes a binding agreement for the CaseWorthy Application(s) Professional Services listed in this Order Form and is effective on the date signed by Customer.

Offer Expiration Date: January 31, 2020

This Order Form is governed by and incorporates the agreement between CaseWorthy and Customer (hereinafter "Agreement") in effect as of May 31, 2017 and if any terms and conditions of any of the Agreement's documents conflict with the terms and conditions of this Order Form, this Order Form will control. Customer has had the opportunity to review the referenced and incorporated Agreement prior to executing this Order Form. All defined terms in the Agreement used in this Order Form have the meaning stated in the Agreement.

2. CASEWORTHY APPLICATION(S) PROFESSIONAL SERVICES

2.1 CASEWORTHY PROFESSIONAL SERVICES: The CaseWorthy Pricing Table in Section 2.2 herein shows the purchased Professional Services and fees. CaseWorthy will provide the Professional Services subject to the terms of this Order Form. CaseWorthy's obligation to provide the Professional Services will end upon expiration of Customer's current Subscription Term unless otherwise stated herein.

2.2 CASEWORTHY PRICING TABLE:

PROFESSIONAL SERVICES	QUANTITY	RATE	TOTAL COST
	HOURS		
Hours Overage To Date	44	$125	$5,500
Report Configuration[1]	61	$125	$7,625
Dashboard Configuration	15	$125	$1,875
Additional Roles Definition	16	$125	$2,000
Workflow Configuration	10	$125	$1,250
Portal Configuration	80	$125	$10,000

Project Management	20	$125	$2,500
Development[2]	13	$125	$1,625
Additional Configuration	40	$125	$5,000
Total of Additional Charges & Discounts	**299**	**$125**	**$37,375**
Total Cost			**$37,375**

TABLE KEY:
[1] = Report configuration includes the Pledge Report, Case Management Reports, EFSP Reports, Daily & Weekly Expense Reports, and the Monthly Expense Reports.
[2] = Pertains to issue 25315 and the email notification issue

3. PAYMENT AND INVOICES

3.1 FEES AND INVOICING: Unless this Order Form states otherwise, fees for the Professional Services will be invoiced by CaseWorthy and paid by Customer on a Net-10 payment schedule. Payment for Professional Services is only due upon completion and delivery of all work within the scope of the Order form. In the event CaseWorthhy requires more hours to complete the work within the scope of this Order Form, the hourly rate for each category will not increases. Customer purchase orders are for administrative convenience and not a condition of payment. Payment for annual Application(s) fees is not dependent upon completion of any Professional Services. Customer may not withhold any amounts due hereunder and CaseWorthy reserves the right to cease work without penalty if amounts are not paid when due. Any late payment will be subject to any costs of collection and will bear interest at the rate of one (1) percent per month or fraction thereof until paid. CaseWorthy may provide invoices to an email address provided by Customer. Pursuant to IRS guidelines, Customer will reimburse CaseWorthy for all pre-approved (by Customer) and appropriately-documented travel costs and related expenses incurred by CaseWorthy in performing any Professional Services for the Application(s). Onsite meetings will require reimbursement to CaseWorthy for its reasonable and necessary costs of travel, which is generally $1,500 (flat rate) for each visit, and out-of-pocket costs for photocopying, overnight courier, unusual long-distance telephone calls, and the like. All non-local trips must be approved by Customer before commencing. Any applicable sales tax is to be paid by Customer.

3.2 PRICE AND INVOICE SCHEDULE: The contract amount, pursuant to this Order Form is:

$37,375

As part of the contract process, Customer will supply CaseWorthy a copy of its sales and use tax exemption certificate, when applicable. Contract fees will be invoiced according to the following payment schedule:

Total due upon completion of both Primary Project and Portal Configuration: **$37,375**

- **3.3 REFUND POLICY:** If project outlined herein is not completed within subsection 5.2.1 timeline, CaseWorthy will refund Customer $70,824 within 90 days from the project completion due date. While CaseWorthy provides Professional Services to Customer, it may become necessary to amend this Statement of Work. Proposed amendments to this SOW are to be submitted in writing. Amendments require the approval of both parties, and become effective on the date of mutual approval unless the amendment states otherwise. Customer will actively test assigned items throughout the project implementation and sign off each item as outlined in section 5.3.

4. AUTHORIZED ADMINISTRATORS: Customer contacts for order confirmation and system notices are governed by the Agreement's terms and conditions. If the Agreement is silent with respect to Customer contacts, the Parties will establish the proper communication channels for system notices and order confirmations.

5. STATEMENT OF WORK FOR IN-SCOPE PROFESSIONAL SERVICES

5.1 SCOPE OF WORK PREAMBLE: This Section 5 provides the contracted project Professional Services for CaseWorthy products and associated project services that are in scope for Customer. For each of the Professional Services provided within Section 5.2 and its subsections, CaseWorthy has estimated a number of Professional Services hours. The total amount of Professional Services hours for the project may not be exceeded without a change order and its associated pricing (the form of which is provided within this Order Form) being mutually approved by the Parties. For each of the Professional Services provided, the hours may increase or decrease, based upon the requirements of the project engagement, but the total amount of hours quoted will not increase or decrease without a mutually-approved change order. When the total amount of hours for the project have been exhausted, CaseWorthy will cease all Professional Services work unless a mutually-approved change order is executed by the Parties for CaseWorthy to provide additional Professional Services. If CaseWorthy has satisfactorily completed all project tasks without exhausting the total amount of Professional Services hours for the project, Customer will receive a credit or refund (when applicable) for those remaining hours, or Customer will not be invoiced for those remaining hours.
CaseWorthy's Professional Services process may involve formal scoping and discovery work with Customer that may result in the drafting of a requirements document or project plan or both, which when mutually approved by the Parties, there may be a need to amend this Order Form to ensure consistency with a requirements document or project plan or both. The Professional Services to be delivered by CaseWorthy for this engagement are provided in Section 5.2 and its possible subsections herein.

5.2 SCOPE OF PROFESSIONAL SERVICES:

Existing Hours Overage: **44 Hours**

The overage hours include configuration and project management hours beyond the initial Statement of Work and completed prior to this Statement of Work, have been completed and approved but payment has not been received.

Development

- 25315 - Financial service request payment processing - in progress - Brandon Bird – **10 hours**
- Not Yet Assigned - Finalize email notification when client shows up for appointment - **3 hours**

Reports

- Pledge Report – **10 hours**
- Case Management Reports – Finalize search forms – **5 hours**
- EFSP Reports – **16 hours**

- Daily Weekly Expense Reports – **24 hours**
- Monthly Expense Reports – **6 hours**

Portal – **80 hours**

The Portal configuration scope includes the intake workflow and the ability for a client to login and view the status of their service requests.

Additional Configuration:

Dashboards: **15 hours**
Role Definition: **16 hours**
Workflows: **10 hours**
This configuration scope is defined in the Work To Be Completed Addendum herein.

Misc. Customizations/Project Management – **20 hours**

Additional Configuration, as needed, when assigned hours have been used: **40 hours**

Total Hours Needed: **299 Hours**

5.2.1 PROJECT TIMELINE:

All services within this scope of the Primary Project within this Statement of Work, excluding the Portal configuration (i.e. Configuration, reports, and development) to be completed within 60 days from contract execution. The Portal configuration services will then be completed 3 months from the completion of the configuration services outlined above. The below table includes estimated start and completion that are subject to change based on contract execution date.

Pre/Post Go Live Sprint Schedule	Estimated Start Date	Estimated Completion Date
Open Priority one Calendar Issues	01/23/2020	03/23/2020
Open Priority one Reports Issues	01/23/2020	03/23/2020
Open Priority one Processes & Workflow Issues	01/23/2020	03/23/2020
Open Priority one Child Services Issues	01/23/2020	03/23/2020
Project Go-Live		03/23/2020 or 60 days from contract execution.
Web Portal Configuration	01/23/2020	04/23/2020
Portal Project Go-Live		05/02/2020 or 90 days from primary project completion.
Priority two and three Issues	02/03/2020	04/03/2020
Post Go-Live Support with Remaining Hours	03/03/2020	05/02/2020

Project Completion and Go-Live Dates:
The project scoped herein has a Go-Live date not to exceed March 23rd, 2020.
The Web Portal project scoped herein has a Go-Live date not to exceed May 02, 2020.

5.2.2 PROJECT MANAGEMENT SCOPE:

PLANNING: CaseWorthy project management responsibilities shall include the following activities throughout the project life cycle:

- Fixed 1-hour weekly checkpoints with Project Manager. Both parties must be present and participate in the weekly check-ins and configuration reviews. The first checkpoint to occur not later than one week after execution of this Statement of Work.
- Full-application reviews, not to exceed 4 full reviews within the project timeline, with Project Manager. Both parties must be present and participate in the full-application reviews.
- Defining and clarifying project scope. Any clarified definitions and project scope are to be in writing.
- Creating a risk assessment strategy to identify project risks and their mitigation plans;
- Developing and managing the overall project plan;
- Identifying key milestones; and
- Establishing project governance structure to review project progress and channel escalations.

ORGANIZING: With Customer's structure in mind, CaseWorthy project management may organize the project by:

- Working with Customer to define the organizational structure of the project team;
- Identifying roles and responsibilities;
- Identifying services to be provided by external companies and vendors;
- Working with Customer to staff project positions; and
- Procuring sign-offs, including:
    - Configuration sign-off: CaseWorthy sign-off document required before final Customer-testing can begin;
    - Testing sign-off: CaseWorthy sign-off document required before CaseWorthy can migrate to *Production;* and
    - Production readiness sign-off.

LEADING: CaseWorthy project management will work with Customer's project team to provide clear and consistent communication, with activities to drive the project, which may include:

- Managing conflict resolution and triaging project escalations; and
- Setting team direction:
    - Coordinating activities across different organizational functions; and
    - Assigning resources appropriately.

CONSULTING: CaseWorthy project management will incorporate measuring, evaluating, and correcting project progress throughout the project timeline by:

- Developing weekly status reports to summarize progress, high-lighting risks and issues, and defining next steps and Customer action items;
- Conducting weekly status meetings to discuss action items and tasks scheduled for completion in the upcoming weeks;
- Conducting weekly configuration/functional calls that may be driven by a CaseWorthy Professional Services consultant with Customer's project manager (PM) receiving feedback on issues/risks/action items;
- Having internal stakeholder meetings that will be driven by Customer's PM with the CaseWorthy PM receiving feedback on the outcome of the meeting and status on action items/risks; and
- Ensuring that Customer's PM facilitate meetings with third-party vendors as needed.

5.2.3 DATA CONVERSION (EXTRACT, TRANSFORM, AND LOAD) SERVICES (when in scope):

1. It is Customer's responsibility to map the data from their source system to CaseWorthy's specifications. CaseWorthy will not fix, map, or modify any incoming data.
2. Customer will choose one of three formatting options for the incoming data (Excel, SQL staging, or SQL target). Once the Extract, Transform, and Load (ETL) process has begun, the format cannot be changed. Requests for format changes after the ETL process has begun may be subject to additional charges via a change order (the form of which is provided herein).
3. The task of validating the data is the responsibility of Customer. CaseWorthy will provide import results and guidance to assist with the validation, but the actual validation must be conducted by Customer.
4. Once Customer's system has gone live, CaseWorthy will consider the ETL to be complete. Any request for imports to occur after go-live may be subject to additional charges.
5. Customer should communicate with the ETL team via the project manager, who is primarily responsible for answering Customer questions and monitoring the time spent on the project overall.
6. Any scheduled meeting time specifically dedicated to the ETL project should be reserved for questions and/or troubleshooting that requires the attention of CaseWorthy's resources. Customer is responsible for having internal discussions, as much as possible, outside of these scheduled meeting times.

5.3 HIGH-LEVEL PROJECT ATTRIBUTES AND ASSUMPTIONS:

- Application will be deployed in U.S. English only.
- Customer will identify a small number of system administrators to support the software service after the project described in this SOW is complete. They will be responsible for ongoing employee data uploads and general user support questions. CaseWorthy recommends a minimum of two (2) system administrators; one as the primary and one as a backup.
- When necessary, Customer's PM will work with CaseWorthy to establish a project plan and manage issues and action items throughout the project.
- Customer will ensure its staff has the appropriate skills and experience to complete assigned project tasks. If any Customer personnel fail to perform as required, Customer will provide suitable additional or alternative staff.
- Customer and CaseWorthy are responsible for communicating the status of the assigned action items with the Project Manager and to escalate to the Customer Project Manager and/or the Project Management Supervisor, as needed.
- Customer and CaseWorthy are responsible for communicating any at-risk issues and to work together towards resolution.
- Customer will actively test assigned items and sign off each item within 5 business days (unless agreed upon, in writing, in advance by both parties). Sign off indicates the submitted items contain the content requested and is functioning as agreed upon prior to submittal. Sign-offs include but are not limited to:
    - Agreed upon resolution of Priority One Issues
    - Projection completion
    - Portal configuration
    - Resolution of Priority 2 and 3 Issues

  "Actively test" is defined as reviewing the baseline and/or custom functionality configured within CaseWorthy software and insuring the items meet all business rules defined in the requirements.
- Unless otherwise stated within this SOW, for any Professional Services work that involves field-mapping for reports, whether reports customizations or configurations or SSRS MS report training within the CaseWorthy solution, Customer is responsible for that field-mapping. If Customer is incapable or unwilling to perform the field-mapping, Customer has the option to engage CaseWorthy to perform the

field-mapping or provide training to Customer to enable Customer to perform the field-mapping, which will be billed accordingly.

- Customer is responsible for all decommissioning activities to legacy applications and services.
- Customer will be responsible for communicating the vision, goals, and business case of the program to applicable employees; CaseWorthy does not provide change management services.
- This Order Form is based on current application features only; configuration of future enhancements or enhancements released during the duration of the project are not included.

5.4 MUTUAL COOPERATION: Customer acknowledges that its timely provision of and access to office accommodations, facilities, equipment, assistance, cooperation, complete and accurate information and data from its officers, agents, and employees, and suitably configured computer products (collectively, "Cooperation") are essential to performance of these Professional Services, and that CaseWorthy shall not be liable for any deficiency in performing said Professional Services if such deficiency results from Customer's failure to provide full Cooperation. Customer has notified CaseWorthy that Customer IT team will not be involved in the completion of this project. In the event of a suspension of this project, Customer will have the option to engage CaseWorthy to complete the project upon the execution of a mutually-approved SOW subject to CaseWorthy's current Professional Services rates.

5.5 PROJECT CHANGE CONTROL: Throughout this project, new information may surface that may necessitate a change in business requirements or a change in the technical environment. These changes may result in a change in project scope and therefore affect the estimated level of effort, project timeline, or software service features. Any such changes will require a change order, which either Customer or a CaseWorthy team member will complete. Change orders may result in additional fees. CaseWorthy may also charge for the time required to scope complex requests. CaseWorthy will advise Customer of the price estimate if a charge will apply.

If a change order is needed, either Customer or CaseWorthy may use its change order form, provided the other Party approves of said form, the approval of which shall not be unreasonably withheld by either Party. If Customer initiates a change order request, Customer is required to complete the change order request and submit said change order request to CaseWorthy for review. CaseWorthy will not be responsible for drafting change order requests if Customer's employees, contractors, or agents orally communicate a change order request to CaseWorthy.

A completed change order form includes the requested change, the impact on the current engagement, and the estimated resources, time, and fees to implement the change order. A Party will submit the completed change order form to the other Party for review and approval. Change order estimates will remain valid for a period of ten (10) business days from the date of submission. If CaseWorthy submits a change order to Customer and Customer does not approve the change order form within the ten (10) business days, the change order will automatically expire unless CaseWorthy has extended the period of validity in writing. Upon receipt of written approval, the CaseWorthy team will begin work on the requested change according to the agreed-upon schedule. In addition to Appendix A, CaseWorthy's Change Order form, the Customer Acceptance and Sign-Off Form is provided in Appendix B.

5.6 ISSUE MANAGEMENT: The goal of issue management is to prevent issues from having an adverse effect on the project. The resolution of an issue could affect any aspect of the project including scope, costs, benefits, risks, project organization, and schedule. It is critical to identify and document issues as early as possible, assign ownership, define follow-up dates, and track issue resolution. CaseWorthy will track issues using a project issues log. High-impact issues could have an adverse impact on project schedule and overall success. The team should track high-impact issues closely. If an issue is categorized as high impact, the team should escalate it within the project structure so that it is visible to executive management and every effort is made to resolve it.

6.0 DEFINITIONS:

- Subscription Term: Duration for which CaseWorthy grants Customer license to execute CaseWorthy's Application, detailed in the Agreement.
- Project Manager: Individual designated by Customer to be the primary contact with CaseWorthy and facilitate Customer's responsibilities under this SOW.
- Primary Project: Collection of customizations for CaseWorthy's Application.
- Portal: Internet-based community access involving the Application available 24/7 (excluding scheduled maintenance and enhancements times), allowing self-service; Nueces County online programs and services, including intakes and applications.

SIGNATURES

The Parties agree that a facsimile of this Order Form shall be considered as the original, and that such facsimile, when counter-signed by the other Party, and any copy thereof, shall be as legally binding as the original.

CASEWORTHY, INC.	CUSTOMER
By: ________________________________	By: ________________________________
Name: ______________________________	Name: ______________________________
Title: ______________________________	Title: ______________________________
Date: ______________________________	Date: ______________________________
CaseWorthy, Inc. 3995 South 700 East, Suite 420 Salt Lake City, Utah 84107	Nueces County 602 N Staples, Suite 180 Corpus Christi, TX 78401

ADDENDUM
Work To Be Completed

All items listed below are Priority One items and to be completed within Phase 1 of this Statement of Work.

Calendar Functionality:

Calendar
Allow direct time entry for 1/4 hour increments if needed
Time picker should be enabled on multi-user calendar
Multi-use Calendar load time: Lag time with scheduling an appointment
Availability vs. Unavailability
How appointments are moved and/or rescheduled? When an attendance is recorded can the event stay on the record? Option to reschedule?
"Save" button on Record Attendance needs to be redirected
Recording Attendance: Where is information stored and how is it reporting? Form needs to be corrected to keep the event.
Drag and drop error - app errored out when trying to reschedule client 1 hour later or 1 hour before appointment
Record Attendance - attendance calendar - app errors out
Do not know how to manage No Shows, Reschedules, etc.
Hard code resource and usage on calendar
During scheduling an appointment, the client is scheduled with a case manager. Can the case manager assigned be assigned as the case manager on the case?
Drag and drop and appointment from one time slot to another time slot.
When the Front Desk "checks in" a client will/can an email be sent to the Case Manager notifying them of the arrival?
Date display not visible if three or more users
Client is not automatically listed as an attendee on their own calendars.
Case Worker should be automatically assigned once appt is made. This is not occurring.

Appointment - Attendees list needs to be filtered.
Time displayed on multi-use calendar: Displays time twice. This was previously seen 3 x.
Enter time directly vs time picker
Record Attendance - remove entity ID, appointment ID and case manager ID
Lidia Rodriguez is now on the calendar but not automatically assigned as case worker when the appt. is in her name.
The Timepicker: the hours/minutes/am/pm change while hovering, without clicking.
Clean up view with only name showing in appointment slot. Remove time above client.

Reports:

Reports
Caseload Report
Worker Detailed Report
Expenditures
Credit Card Daily Payment Confirmation
Daily-Weekly Expense Report for all Funding Programs
Pledge Payment Form for HEB Food-Household Vouchers
Pledge Payment Form for city CC Pledge
Pledge Payment Form for Greyhound Bus Ticket
Monthly Report
Monthly Expense Spreadsheet
Daily Expense Log
Monthly Expenses Spreadsheet
Burial Report
Disability Report
Check Deposits for all Funding Programs
Demographic Report

Outcome Report
Appointment Report
Client Sign-In Report
Burial Breakdown by Vendor and Services

Child Services

Child Services
Needs to be separated into a different program or organization from Social Services
Vouchers do not have templates. Also, there is a Void After field on the voucher form that does not auto-populate on the Voucher form in application
Can't search by impact ID
Vouchers need to auto populate address and be editable.
Add client form - was this already configured for C.S. and is broke now?
Where is the address history stored?
Quick add client needs to have placement type selections. Kindship vs. Foster placement. Also, needs date of placement
Current placement information need to be updated with foster parent last, first name
How do we attach documents for Child Services?
Current placement information did not save for this child.
Use a separate "Find Client" form
State and Zip do not auto-populate on the Quick Add Client form
Where is the placement history stored at?
Change Contact Information section to Social Worker information on Add Client Contact form
Hide client ID and replace with impact ID in ALL areas referring to client ID.
Edit client takes you to the quick add client page. Is this where we modify the Impact ID?
Global change of any reference of "client" to "child"
Vouchers need to state service type instead of clothing type.

Workflows

Impact ID is from Child Services. This should not be in the Social Services area. This may be cosmetic, but we need to ensure that the two programs do NOT interact.
Reference Date has the wrong time.
Red Wheel next to the HOH name: when you click on it, the options are unclear.
Remove and exit family members. How does this show up in the exit or discharge data if a family member is removed? No info can be added or changed.
Would you like to exit the client from another enrollment? I'm not even sure what a 2nd enrollment would be. If she's only part of one open case, how can this even be an option? You cannot get through this workflow
So, if i exit the first enrollment, the client automatically becomes a client and a new case is opened for them?
Why aren't all family members displayed when doing a search?
Are all types of attendance captured for reporting?
And, for this one for Dean, I clicked Void and it disappeared. When I go back in through services requests, it says Turned Away. Those 2 things are not the same thing. So will the void not be part of the history? And what is the referral date as Description of Event?
If I try to find the previous one under denied, it is not there.
Elayne is trying to approve this case plan, which says pending. If we go to case note approval, it isn't there. If we go to case note approval, it isn't there.
Client appt. history from dashboard vs. the client appt. history page data does not match. Does not show cancelled appt. when changing filter on client appt. history page.
Not only are the FSRs showing up 2x on the supervisor's approval, but if you approve one, they both are removed from the queue.
Pending notes show up on Administrator role, but supervisor's queue is blank.
Does not have an option to submit a case note for approval.
Add new external - the refer to field lookup has no agencies and gets an error.
Monthly" interval is set to default and it is not
need some explanation/clarification/training on services other than financial specifically in CW role, Indirect Services, Inventory Service Summary and Gift Cards
If a client is re-enrolled within the 30-day window, is there history where you can see the opened/exited and re-enrolled data on a form?

Can list be separated by location (Corpus Christi/Robstown) of the user that creates the client account? Add location field. Remove DOB and SSN.
Deletes the information if you try to save without every field populated.
Does this show the entire history or only the current enrollment?
This has an override but does not have another factor for authentication
Add location so we can sort by location. Supervisor role will need multi-location selection.
Cancelled appt. do not appear on the history.
Need the questions with the answers available and not disappear after the questionnaire is complete.
How do we manage inventory? Bus passes, etc. Which role will be responsible?
Since the inception of the new calendar, the Appointment Sheet Case Notes have not worked.
Configure the "Case Plan Review" template for emailing Case Manager that queries the Client's Name, DOB, Date
Does Reverse Approval not work at all?
Not every note for approval was listed as pending on the client dashboard
supervisor does not have a list of pending case notes for approval process.
We need the option to have Case Note as a blank free form note added to the case in the Add New Case Note for Approval page.
I need assistance with Ken in the background configuration of the added 2"d document on an FSR
Before FSR is approved, need to be able to edit amount or account
Loops aren't completed or we don't know how, such as case notes or FSR on hold
Service request summary/history does not tell you anything.
Remove "General" from funding list.
Configure 2nd document addition on the FSR
Can't change locations on the service request approvals
Document missing after approved not paid status update
Appointment Sheet Template. Issue with Template Parameters
Make templates ADA compliant for all hand-outs to clients
Review all the templates to see what is missing. Templates change from role to role, too.
Improved printing compatibility and capability; many screens not printable.

If supervisor approves a case plan, you are sent back to the main page and have to click back into Approvals.
Need alerts moved to top of dashboard.
This dashboard should match no matter what role you are in.
I know the screener completed the screen—qualifying emergency completed. But when I go to the Screener Questionnaire to review it (edit), nothing is saved.
Assessment on financial assessment summary does not change to the new date after it is copied and updated.
Employment History has an option of "Salary/Fixed" income and was set to produce a "Monthly Total" due to applicant not having a normal salary job Ken stated that a ticket was placed with an analyst and would be corrected.
Salary/Fixed income not displaying on work history summary page
We need the ability to re-opening a case file. How do we re-open the case file without re-enrolling?
You can't print appt. sheet.
How do you add and delete household members? Review Quick Add family member vs. Add & Enroll Family Member.
I would really like these case notes to be in time order. There could be 10 different case notes for one day.
Still need configuration and column of person who approves the case note
Service request summary - delete option is not available
Case Plan Review Template for emailing Case Manager
I am in the Case Worker role, but under enrollment it says “Case Manager”. Consistent language throughout.
Middle name for HOH is “Child Middle Name”. Correct this to “Middle Name”.
Update all HHM button should default to being checked, not unchecked.
Screening question on whether the screen is in person, by phone or completed by supervisor is out of place under Demographics.
Household will always be (1). Why put the “(1)” here?
How will workers use the hh ID?
HH has zero income. Why are the boxes for HH Poverty Income and % of Poverty blank?
Red Label says “Client Families” Change to “Household”. “Family Name” change to “Household Name”. Consistent language needed. We have said from the very beginning that we look at households, not families.
Could we have Primary Language default to English?
Step 2: Add new member (this is exactly the same as the first option. Maybe because there is only one hhm? What does this look like if there are more hhm to edit?

Drop down list of caseworkers should include only caseworkers and social workers, not agencies, or companies or clerical staff.
We would like the ability to send an email to caseworker.
Error when caseworker did not attend and tried to substitute another worker. Do we need the worker 's availability recorded, and if so, does this data go anywhere?
Attendees field includes all clients. Should be just workers.
Reorder My CaseWorthy button as the first selection after selecting a client.
Lookup displays all doc types
Header is in the middle of the page once the page is moved
Hide household name
Relabel Work history to Employment history
Manager assignment - hide mentor team and relabel mentor provider
Rename role from Case Manager to Case worker and in any reference in the application.
Hide client ID
Remove dependent checkbox. Can the font size be bigger?
Do not need a Description column if I'm using the File Label which above is called File Name and Document Type. We were told we could not have "files" so we should have Document Type and Document Description, not File Label.
Yes or No option for "verified" on financial spreadsheet
Default to Social Services
Add appt. date and interview date fields
Household members - desired column format is Name, Age, Relationship, and Income
Client family page: you get an error if you try to add a family member using the wheel next to the family name.
Location is now defaulting to Robstown. It was reported that CC was the default in the past.
Filter Email Templates to only display those set to Nueces as Organization. Templates are set to Organization Nueces and still all templates are selectable.
Edit case note
When viewing the "Documents" button on the FSR, we want to only see the documents scanned and attached to the FSR and not the list of all client documents
email on FSR approval has CW terminology/choices (sharing/indiv or family).
Filter Email Templates by Org Setup