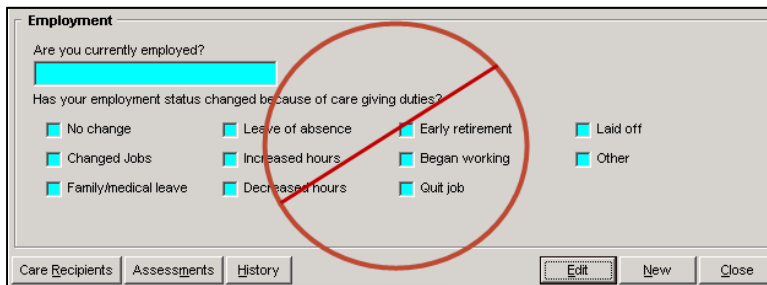


FCSP Queries and Tips

Issue: Finding Missing Caregiver Employment Data

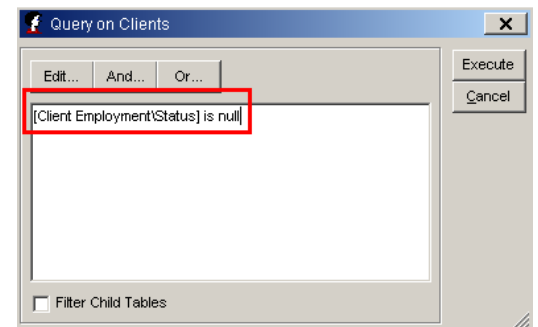
The Employment status in the Caregiver **Client** Record is a required element from the California Department of Aging (CDA).

Note: There are Employment questions in the Caregiver record, but this is NOT the employment data that's reported to the CDA.

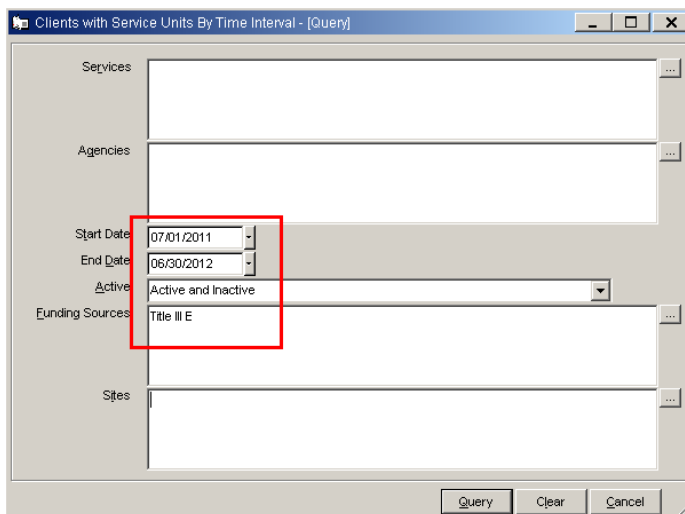


A simple Ad-hoc query will give you the list of Caregivers that are missing Employment Data.

1. Single-click on the query *Clients with Service Units By Time Interval*
2. Click on the Ad-hoc button
3. Enter the following information in the text box or copy and paste the following information:
[Client Employment\Status] is null
4. Click the Execute button



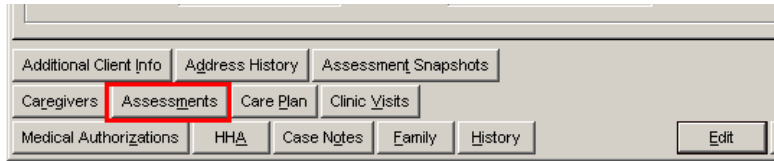
Enter info into the Agency, Start/End, Active and Funding source fields (example is for FY11-12). If your Agency doesn't automatically appear, enter this info.



The result is a list of Caregivers that are missing the Employment Status. Now you simply need to add the Employment Data for each Caregiver on your list.

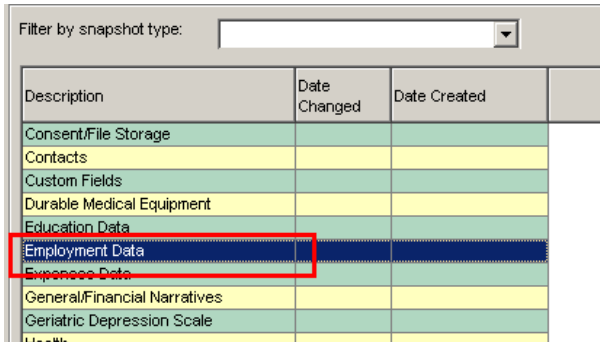
Employment Data Assessment

1. Open each client individually (double clicking on their name).
2. Click on the Assessments button.



A screenshot of a software interface with a tabbed menu. The tabs include 'Additional Client Info', 'Address History', 'Assessment Snapshots', 'Caregivers', 'Assessments', 'Care Plan', 'Clinic Visits', 'Medical Authorizations', 'HHA', 'Case Notes', 'Family', 'History', and an 'Edit' button. The 'Assessments' tab is highlighted with a red box.

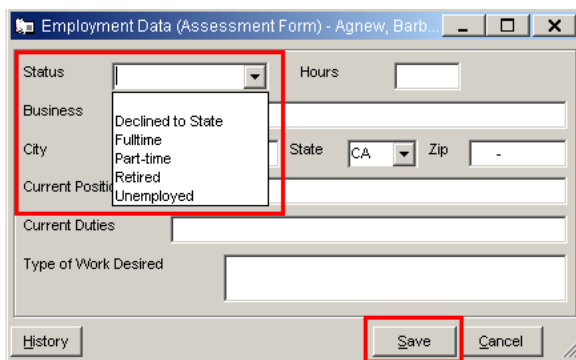
3. Double click on the Employment Data Assessment.



A screenshot of a table with a filter dropdown at the top. The table has columns for 'Description', 'Date Changed', and 'Date Created'. The 'Employment Data' row is highlighted with a red box.

Description	Date Changed	Date Created
Consent/File Storage		
Contacts		
Custom Fields		
Durable Medical Equipment		
Education Data		
Employment Data		
Expense Data		
General/Financial Narratives		
Geriatric Depression Scale		
Health		

4. Click on the Edit button and then enter the correct status and then click on the Save button.



A screenshot of a dialog box titled 'Employment Data (Assessment Form) - Agnew, Barb...'. It contains fields for 'Status' (a dropdown menu), 'Hours', 'Business', 'City', 'Current Position', 'Current Duties', and 'Type of Work Desired'. The 'Status' dropdown is open, showing options: 'Declined to State', 'Fulltime', 'Part-time', 'Retired', and 'Unemployed'. The 'Save' button at the bottom is highlighted with a red box.

5. Continue until you have completed this information for all caregivers in your list.

Issue: Does Caregiver have a Client Record AND a Caregiver Record and is it synchronized?

Query: Service Units in a Date Range

1. Paste or enter the following information into the Ad-hoc entry area:

[Client\Caregiver (Synchronized)\Client (Synchronized)\Name] is null

2. Click the Execute button.
3. Ensure the query has your Agency selected, Title OR Services and Start and End date (usually beginning of fiscal year to current date or end of the previous quarter).

The screenshot shows a window titled "Service Units in a Date Range - [Query]". The window contains a text area at the top with the text: "This report shows all services unit quantities, together with their costs, that have been entered, and fall within a given date range". Below this are several input fields: "Agency" (Sourcewise), "Funding Sources" (Title III E), "Services" (empty), "Start Date" (07/01/2018), "End Date" (05/28/2019), and "Sites" (empty). At the bottom of the window are three buttons: "Query", "Clear", and "Cancel". The "Query" button is highlighted with a red box.

The resulting list displays caregivers that are missing the Caregiver record and/or may not have the caregiver and client records synchronized.

Search Caregivers and if no name appears, you must create a Caregiver record, synchronize the Client and Caregiver records, then link the Caregiver record to the Care Recipient's Client Record (steps 3-5 in the *Caregiver Quick Reference* document).