

Community Action Results Database System (CARDS)

Standard Operating Procedures Manual

Rev 10/2023

Household	<p>Click Household in the left nav.</p> <p>Click "New" to create a new household.</p> <p>Enter all the required fields.</p> <p>Save</p>
Household	<p>Click Household in the left nav.</p> <p>Click "New" to create a new household.</p> <p>Enter the same Street Address 1, City, State, Zip Code as a previously entered household.</p> <p>Save</p>
Household	<p>Within a household</p> <p>Change Mailing Address Same from Yes to No</p>
Household	<p>Within a household</p> <p>Change Mailing Address Same from No to Yes</p>

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Applicant	<p>Click on Applicant in the left nav and click New for a new applicant.</p> <p>Enter/select the newly created household from the look up field.</p> <p>Enter all the required fields.</p> <p>Save</p>
Applicant	<p>Click on Applicant in the left nav and click New for a new applicant.</p> <p>Enter/select the newly created household from the look up field.</p> <p>For SSN, enter the same value as a previously entered Applicant. Enter all the other required fields.</p> <p>Save</p>
CM Event	<p>From an Applicant, click on the CM Event tab (not the left nav)</p> <p>Click "+ New CM Event"</p>
CM Event	<p>With a new CM Event, fill out the required fields and save.</p>
CM Event	<p>From an existing waitlisted CM Event, assign a Case Worker. Save.</p>

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CM Event	From an existing pending CM Event, fill in the Acceptance Date. Save.
CM Event	From an existing waitlisted CM Event, select a Refusal State Code and Refusal Date. Save.
CM Event	From an existing In Program CM Event, select a Discharge State Code and Discharge Date
Family	From an existing CM Event that is either Waitlisted, Pending or In Program, click on the Family tab.
Family	From an existing CM Event that is either Waitlisted, Pending or In Program, add New Applicant or add existing Applicants to increase the number of people in the family
Financials and Benefits	From a CM Event, click on the Financials and Benefits tab, click on New Financials and Benefits. Fill in required fields and Save.
Financials and Benefits	Close the entered Financials and Benefits, and refresh the CM Event
Form and Income Eligibility Calculation	Login to the new system and click the Applicants tab. Find desired Applicant in the list and select. Click on "CM Event" and select desired Event. Click on "Budget" Income Eligibility is an automated calculation based on income in the poverty table. It appears as a notification in top tool bar.

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Budgets (related to CM Event only)	From a CM Event, click on the Budget tab. Click + New Budget Give the Budget a name. Enter optional fields. Save.
Savings	Login to the new system and click the Applicants tab. Find desired Applicant in the list and select. Click on "CM Event" and select desired Event. Click on "Savings" then "+ New Savings" Enter all required and optional fields. Click the Save button.
Threshold	From a CM Event, click on ROMA tab. Select + New Threshold Enter optional fields and save

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<p>Services</p>	<p>Login to the new system and click the Applicants tab.</p> <p>Find desired Applicant in the list and select.</p> <p>Click on "CM Event".</p> <p>Click on "Related" then "Services" in the dropdown menu.</p> <p>Click on "+New Service(Custom)"</p> <p>Enter all required and optional fields</p> <p>Click the Save button.</p>
<p>Referral</p>	<p>Login to the new system and click the Applicants tab.</p> <p>Find desired Applicant in the list and select.</p> <p>Click on "CM Event" then select desired Event</p> <p>Click on "Related" and find "Referrals" in dropdown field.</p> <p>Select "Referral" and click on "+New Referral"</p> <p>Enter all required and optional fields.</p> <p>Click the Save button.</p>
<p>Action Plan</p>	<p>Login to the new system and click the Applicants tab.</p> <p>Find desired Applicant in the list and select.</p> <p>Click on "Action Plan" then "+ New Action Plan"</p> <p>Enter all required and optional fields.</p> <p>Click the Save button.</p>

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Contact and Case Notes	<p>Login to the new system and click the Applicants tab.</p> <p>Find desired Applicant in the list and select.</p> <p>Click on "CM Event" then select desired Event</p> <p>Click on "Related" and find "Contact and Case Notes" in dropdown field.</p> <p>Select "Contact and Case Notes" and create new.</p> <p>Enter all required and optional fields.</p> <p>Click the Save button.</p>
Supplemental Notes	<p>Login to the new system and click the Applicants tab.</p> <p>Find desired Applicant in the list and select.</p> <p>Click on "CM Event" then select desired Event</p> <p>Select "Related" and find "Supplemental Notes" in the dropdown field.</p> <p>Select "Supplemental Notes" and "New Supplemental Note"</p> <p>Enter all required and optional fields.</p> <p>Click the Save button.</p>

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Assessments	<p>Login to the new system and click the Applicants tab.</p> <p>Find desired Applicant in the list and select.</p> <p>Click on "CM Event" then select desired Event</p> <p>Select "Related" and find "Assessments" in the dropdown field.</p> <p>Select "Assessments" and "New Assessment"</p> <p>Enter all required and optional fields.</p> <p>Click the Save button.</p>
School Assessment	<p>Login to the new system and click the Applicants tab.</p> <p>Find desired Applicant in the list and select.</p> <p>Click on "CM Event" then select desired Event</p> <p>Select "Related" and find "School Assessment" in the dropdown field.</p> <p>Select "School Assessment" and "New School Assessment"</p> <p>Enter all required and optional fields.</p> <p>Click the Save button.</p>