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FOLD Housing Association

Prototype Screenshots

CAMS - Case Management System

Date: 23/02/2006

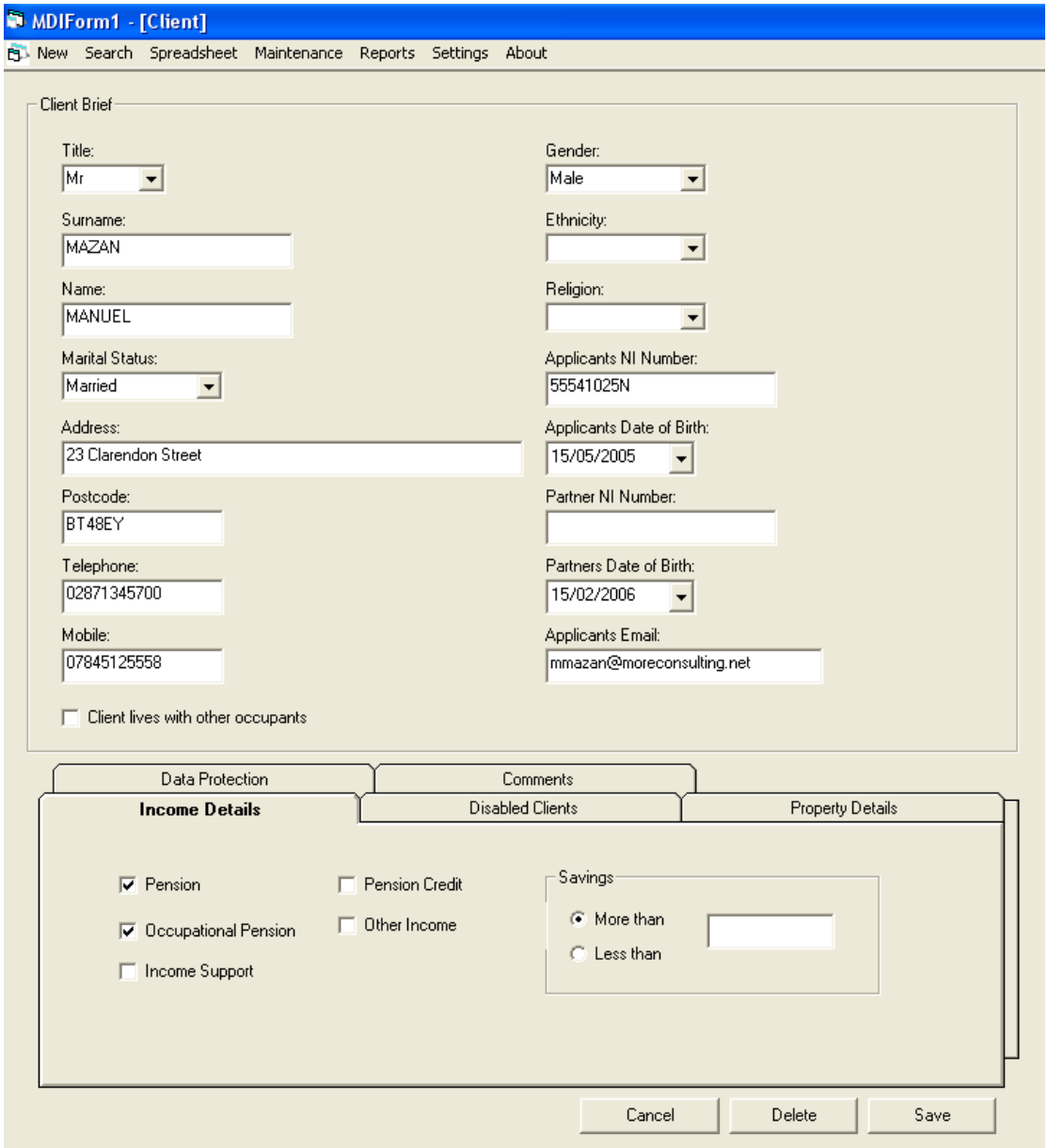
moreConsulting – www.moreConsulting.net - info@moreConsulting.net - (353) (0) 749120886
Director: Manuel Mazan (BSc, MBA)

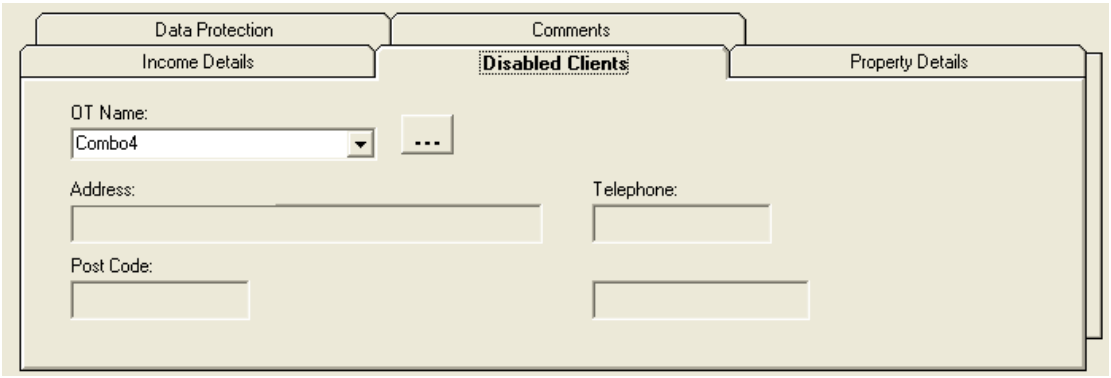
Change Summary

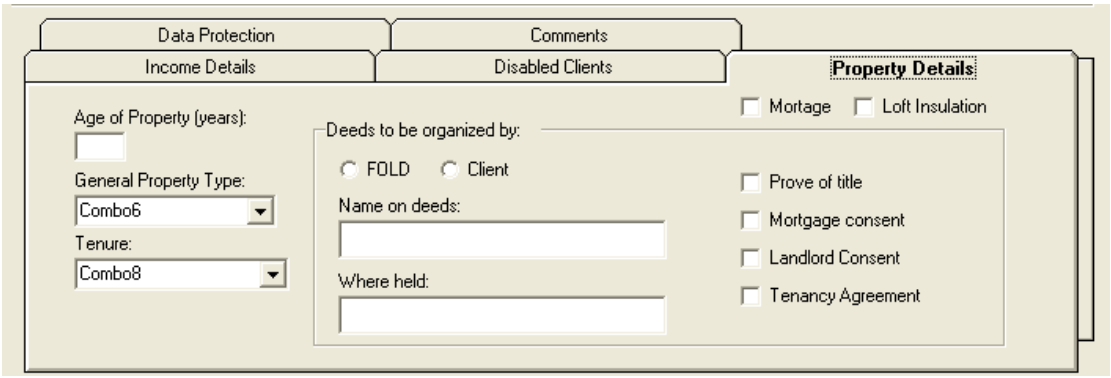
Version	Date	Affected Section(s)
1.0	17/02/2006	Initial Draft
1.1	23/02/2006	Changes according to walkthrough on 20/02/2006 and 21/02/2006
1.2	28/02/2006	Work Offline menu option added to the Spreadsheet menu (see Appendix) to generate the Excel structure.
1.3	01/03/2006	Baseline version – approved by FOLD

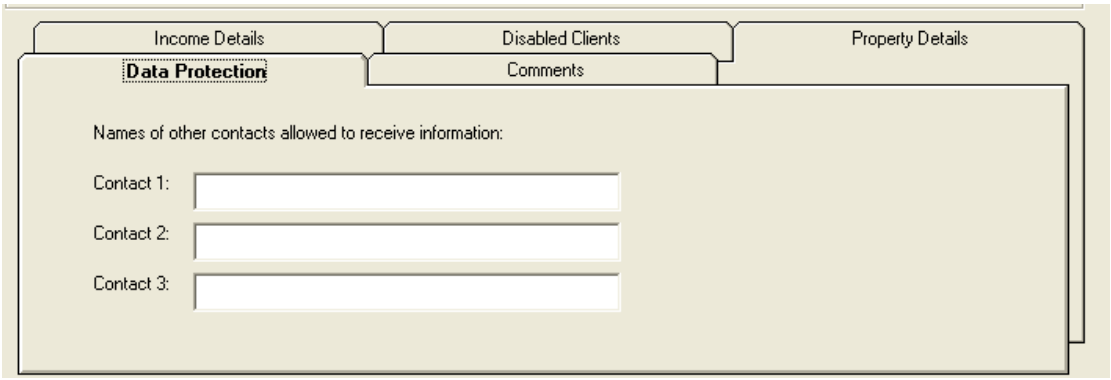
9.1. CMS01_R1601 Maintenance module

Client



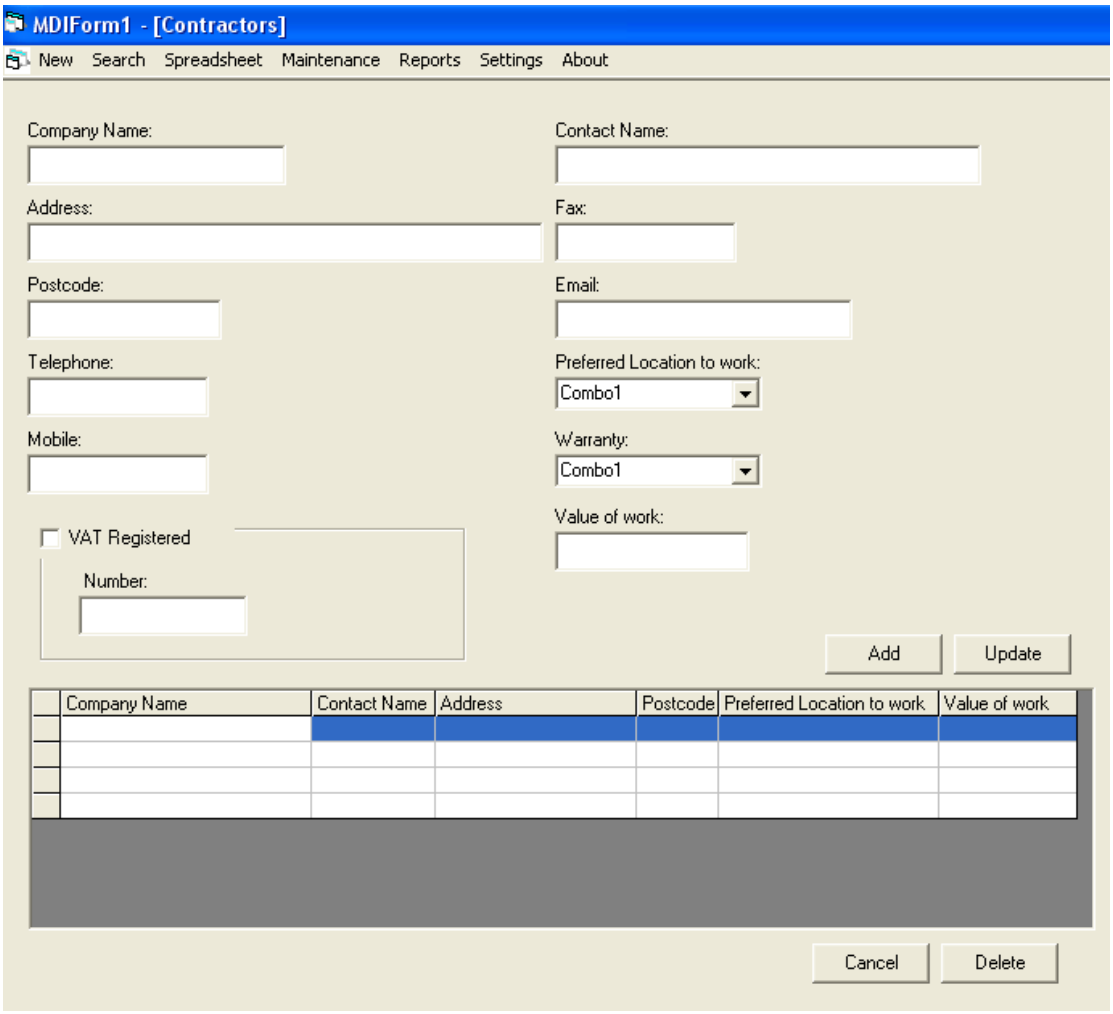

Data Protection
Comments
Income Details
Disabled Clients
Property Details
OT Name:
Combo4
...
Address:
Telephone:
Post Code:


Data Protection
Comments
Income Details
Disabled Clients
Property Details
Mortage
Loft Insulation
Age of Property (years):
Deeds to be organized by:
FOLD
Client
General Property Type:
Combo6
Name on deeds:
Prove of title
Mortgage consent
Tenure:
Combo8
Where held:
Landlord Consent
Tenancy Agreement

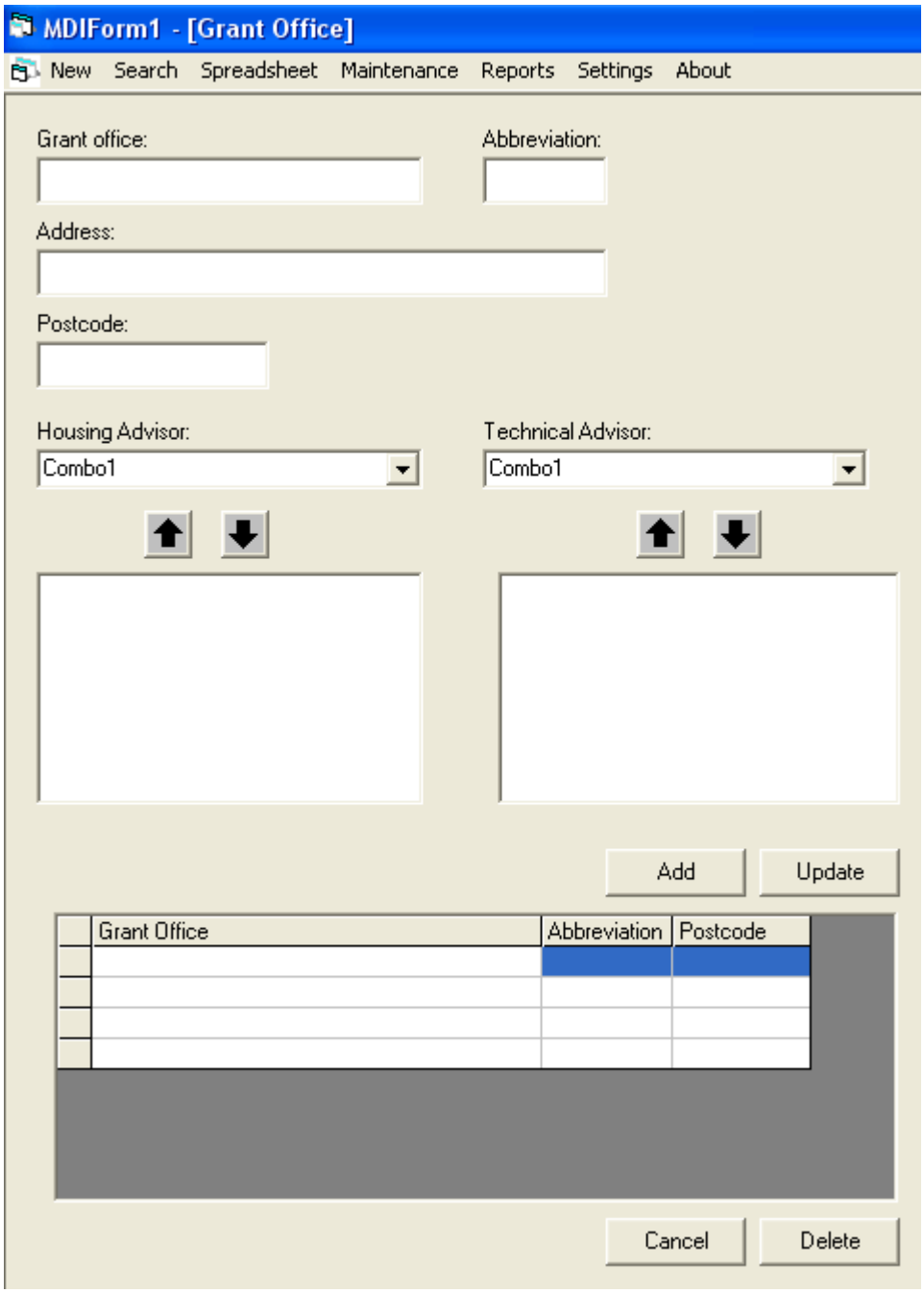

Income Details
Disabled Clients
Property Details
Data Protection
Comments
Names of other contacts allowed to receive information:
Contact 1:
Contact 2:
Contact 3:


Income Details
Disabled Clients
Property Details
Data Protection
Comments

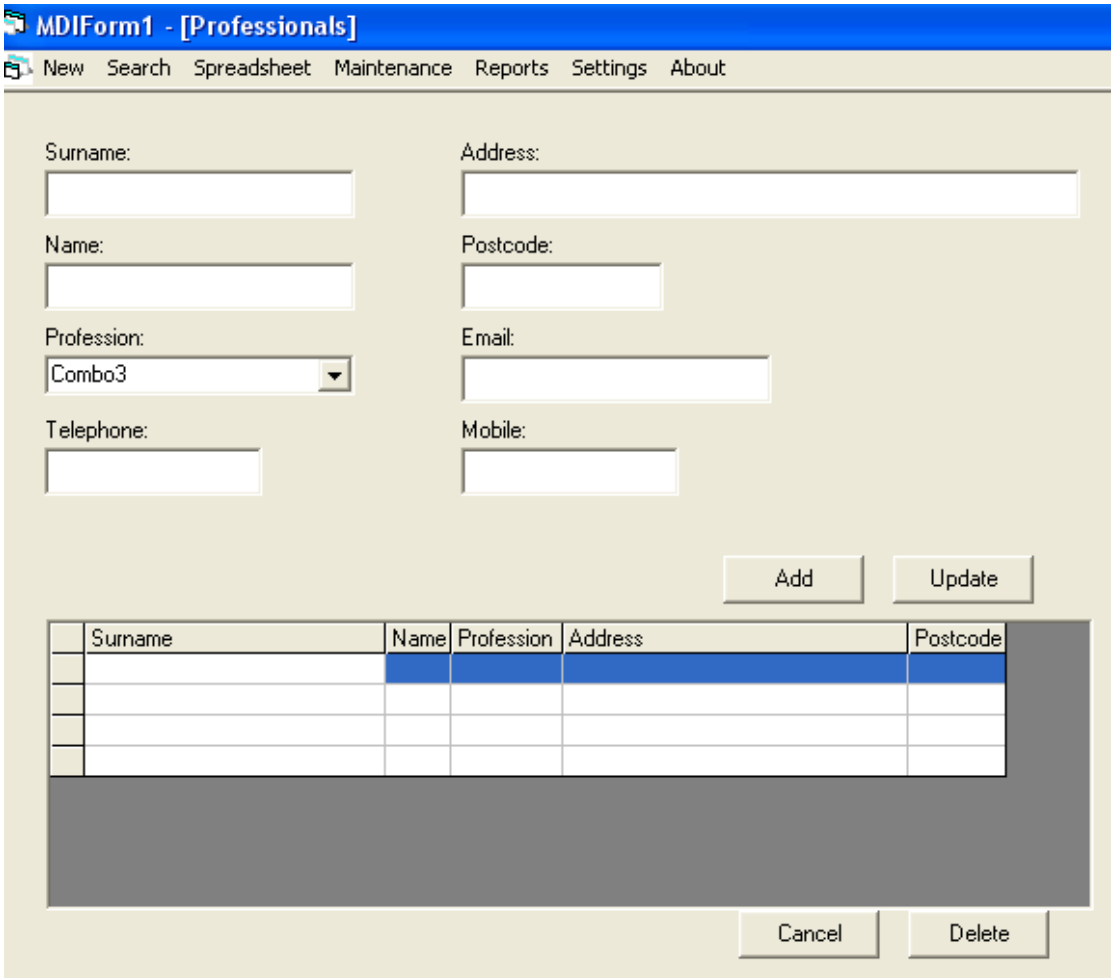
Contractors



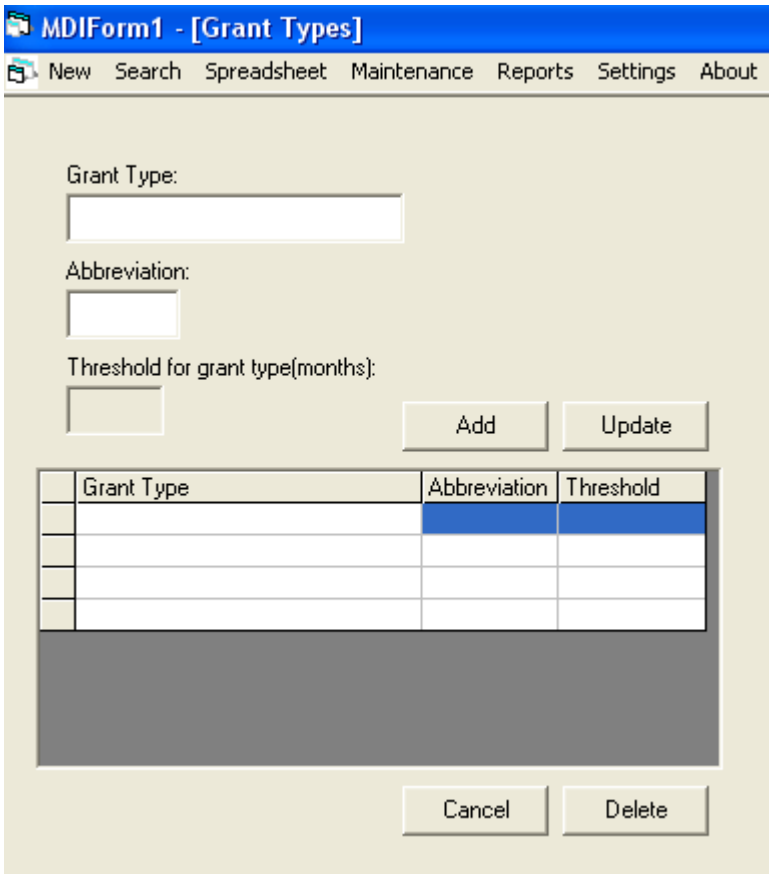
Grant Offices



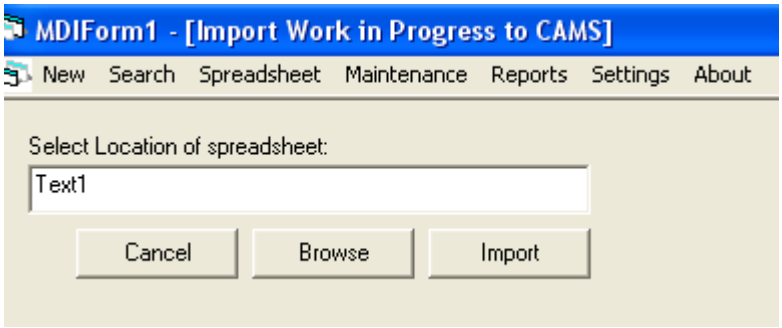
Professionals



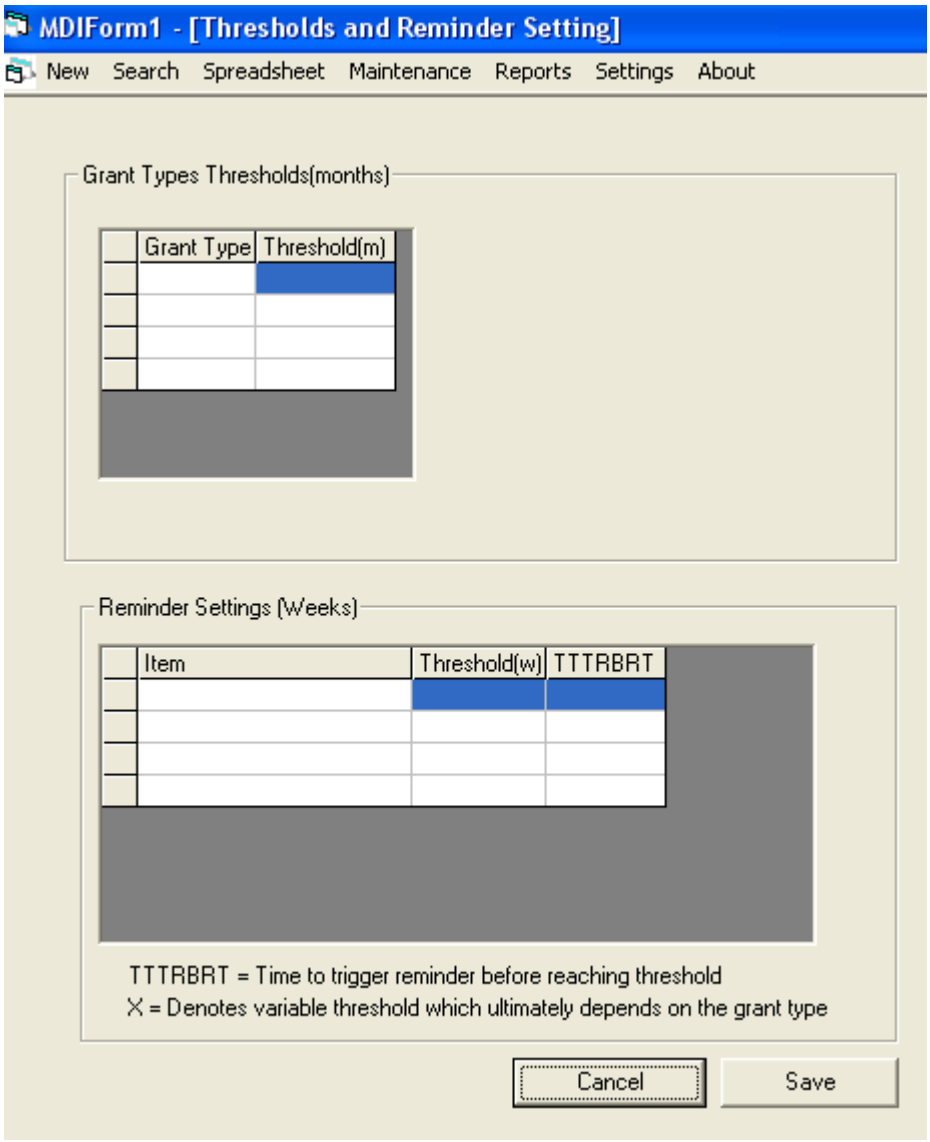
Grant Types



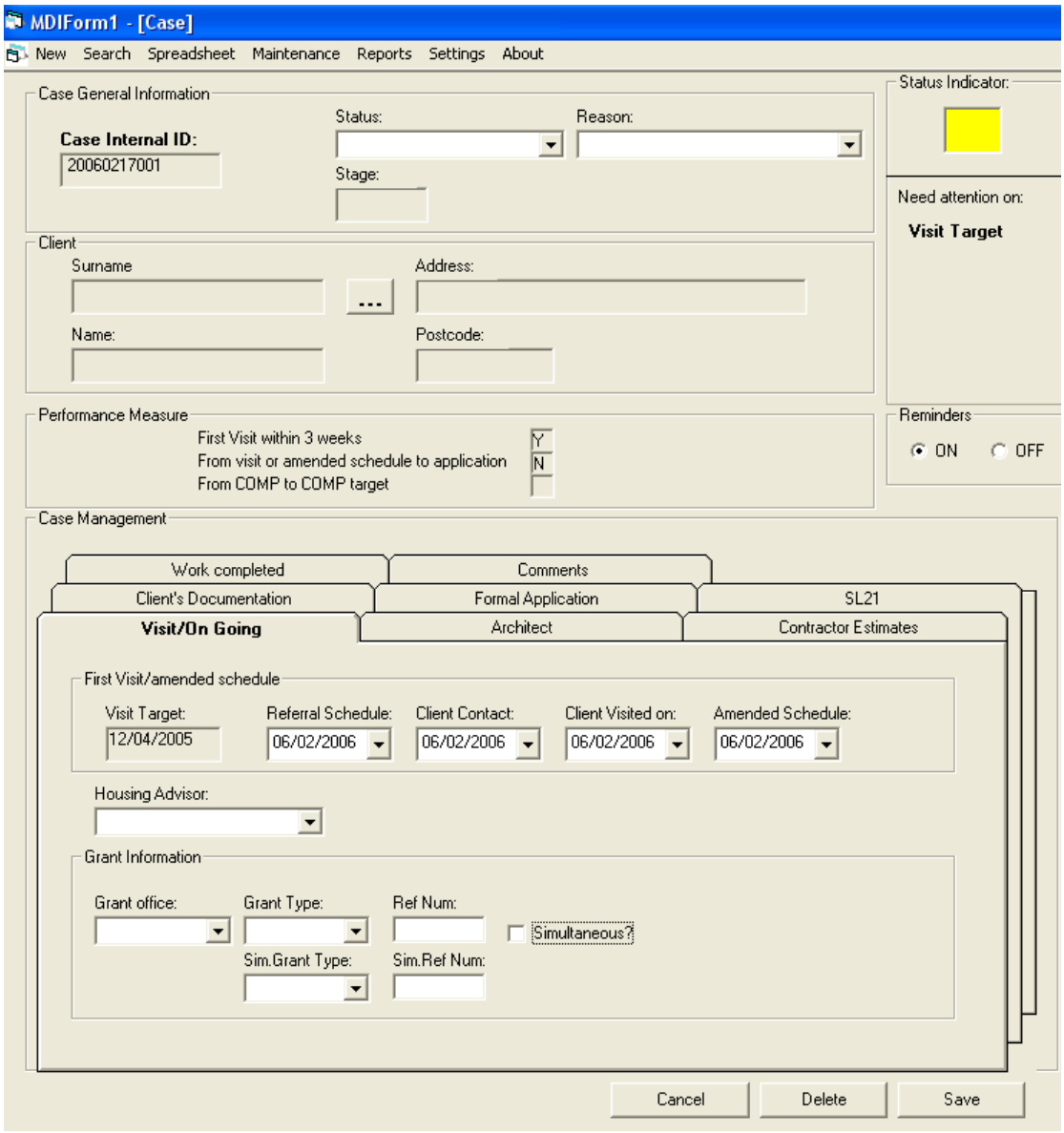
9.2. CMS01_RQ509 Initial load/Import

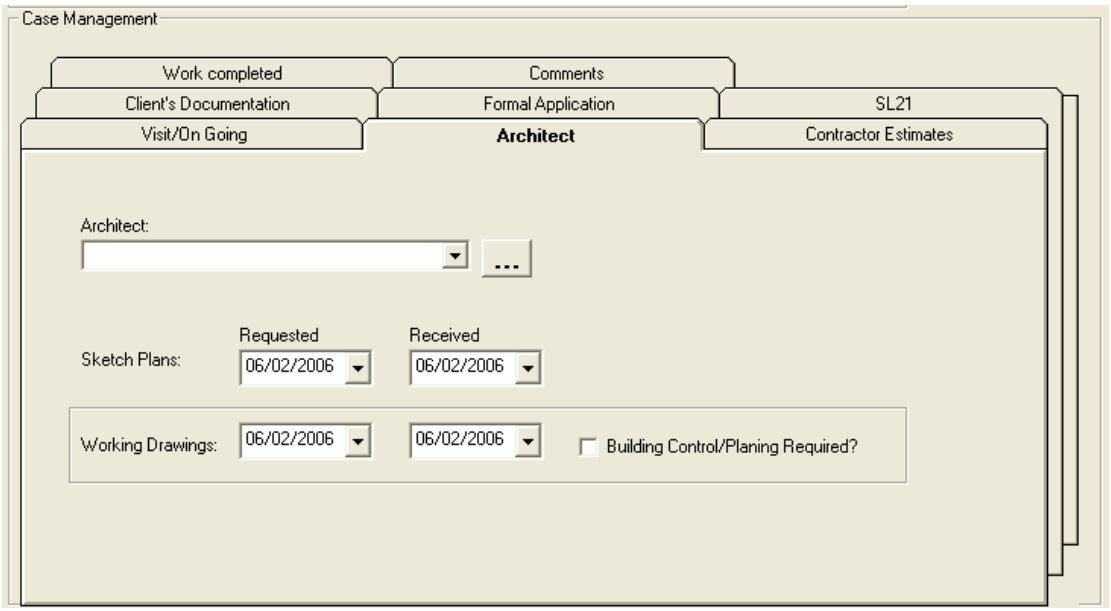


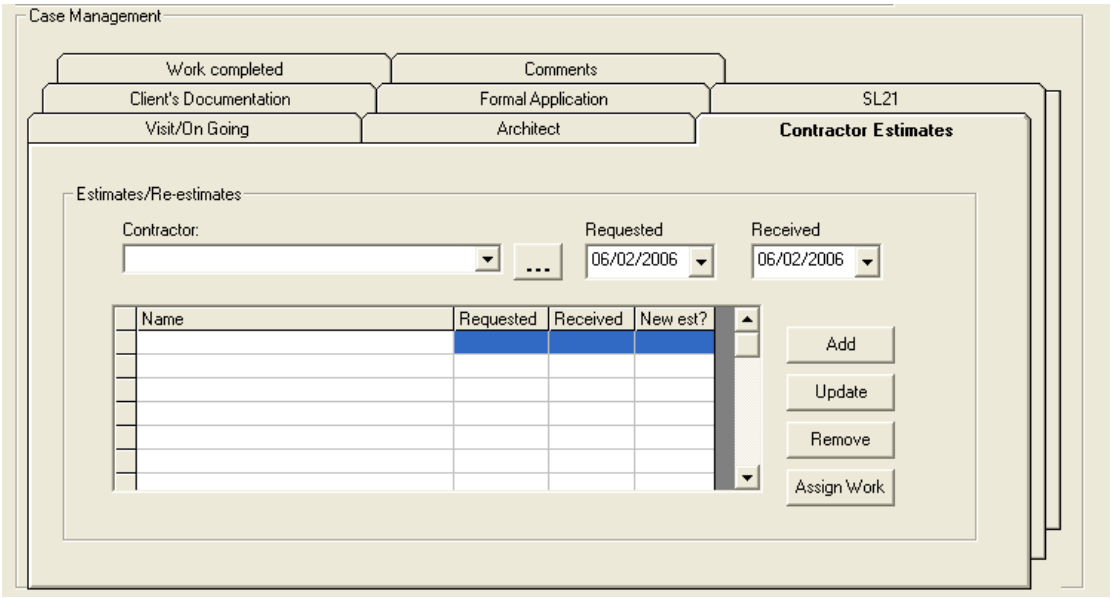
9.3. CMS01_RQ502 Threshold and Reminder Settings

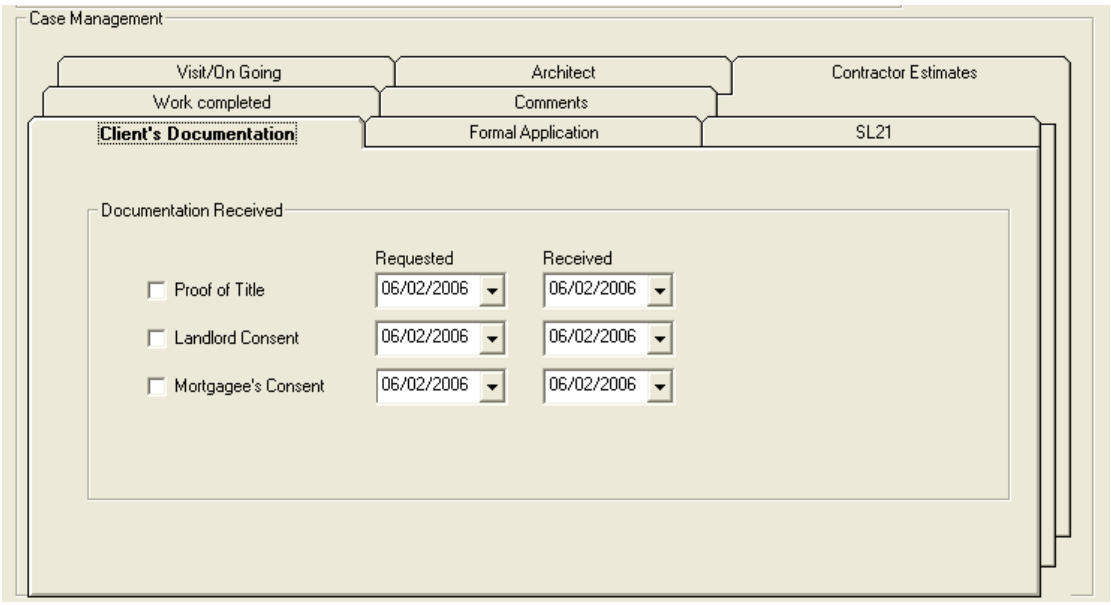


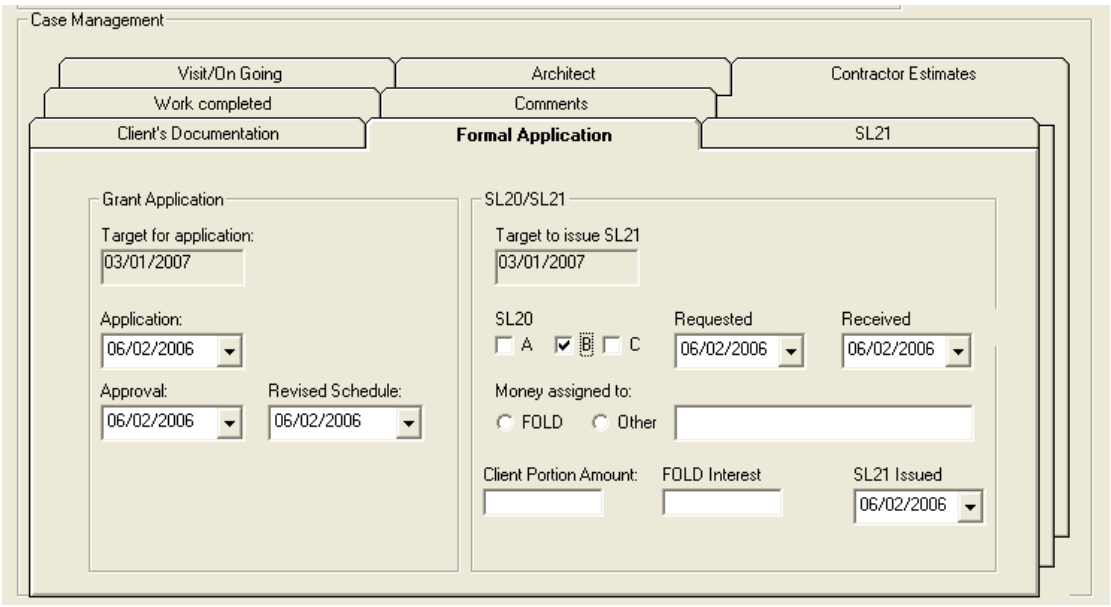
9.4. CMS01_RQ501 Case Management

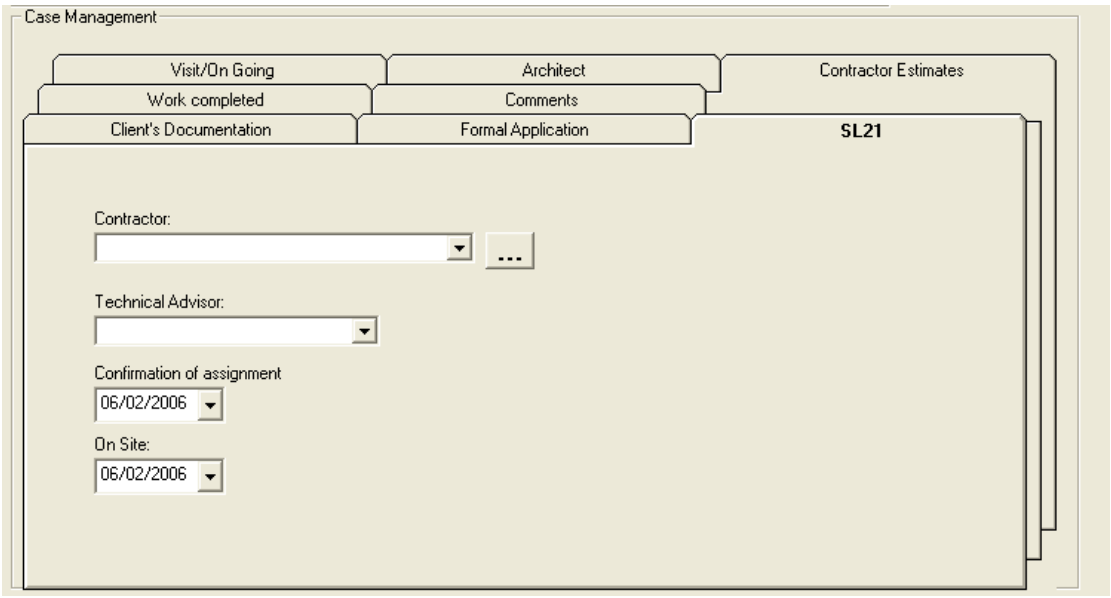


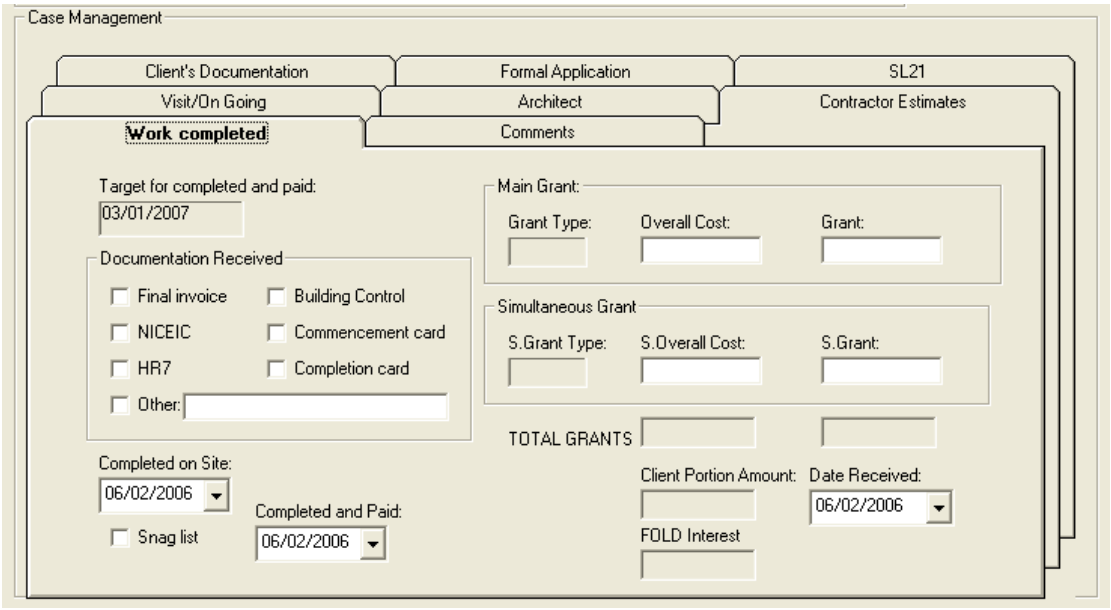

Case Management
Work completed
Comments
Client's Documentation
Formal Application
SL21
Visit/On Going
Architect
Contractor Estimates
Architect:
...
Requested
Received
Sketch Plans:
06/02/2006
06/02/2006
Working Drawings:
06/02/2006
06/02/2006
Building Control/Planing Required?

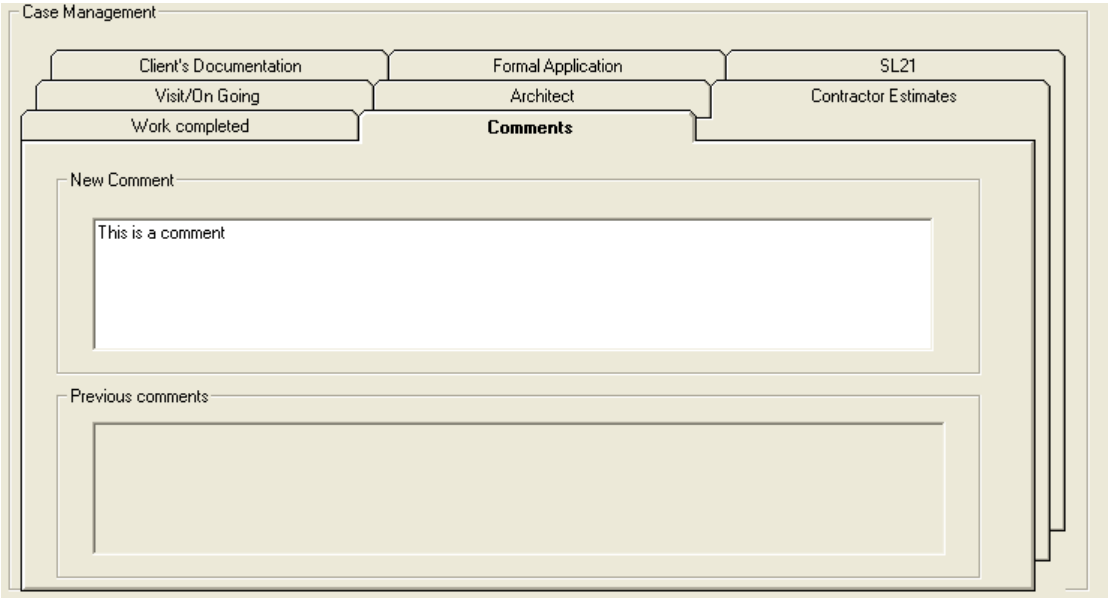

Case Management
Work completed
Comments
Client's Documentation
Formal Application
SL21
Visit/On Going
Architect
Contractor Estimates
Estimates/Re-estimates
Contractor:
...
Requested
Received
06/02/2006
06/02/2006
Name
Requested
Received
New est?
Add
Update
Remove
Assign Work


Case Management
Visit/On Going
Architect
Contractor Estimates
Work completed
Comments
Client's Documentation
Formal Application
SL21
Documentation Received
Requested
Received
Proof of Title
06/02/2006
06/02/2006
Landlord Consent
06/02/2006
06/02/2006
Mortgagee's Consent
06/02/2006
06/02/2006

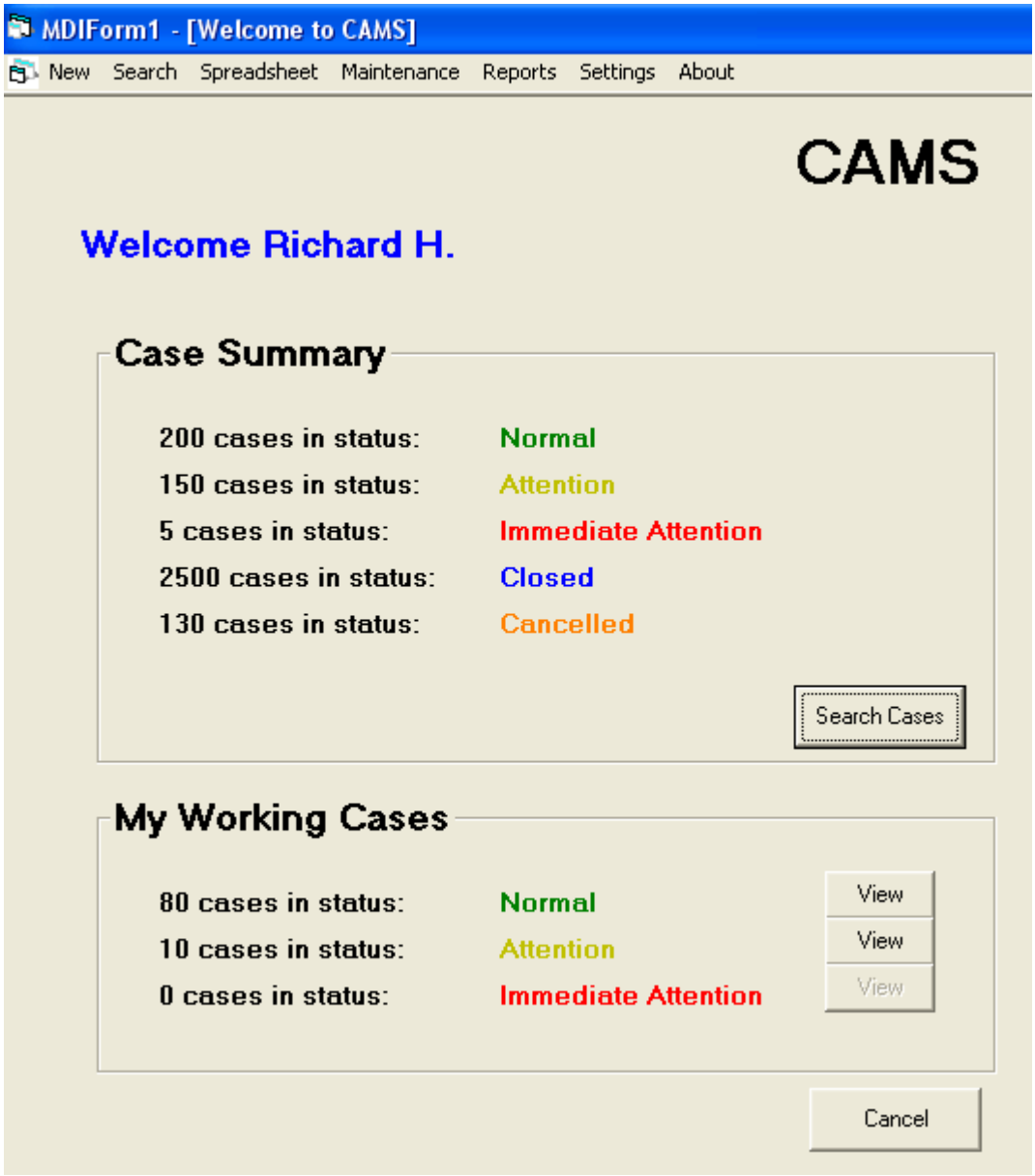

Case Management
Visit/On Going
Architect
Contractor Estimates
Work completed
Comments
Client's Documentation
Formal Application
SL21
Grant Application
Target for application:
03/01/2007
Application:
06/02/2006
Approval:
06/02/2006
Revised Schedule:
06/02/2006
SL20/SL21
Target to issue SL21
03/01/2007
SL20
A
B
C
Requested
06/02/2006
Received
06/02/2006
Money assigned to:
FOLD
Other
Client Portion Amount:
FOLD Interest
SL21 Issued
06/02/2006

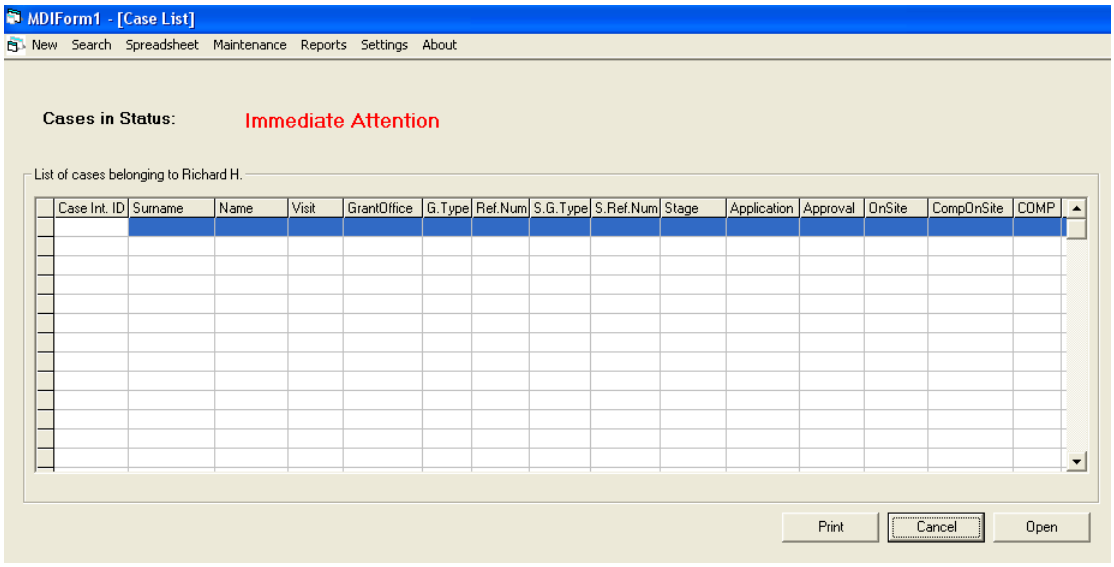

Case Management
Visit/On Going
Architect
Contractor Estimates
Work completed
Comments
Client's Documentation
Formal Application
SL21
Contractor:
...
Technical Advisor:
Confirmation of assignment
06/02/2006
On Site:
06/02/2006


Case Management
Client's Documentation
Formal Application
SL21
Visit/On Going
Architect
Contractor Estimates
Work completed
Comments
Target for completed and paid:
03/01/2007
Documentation Received
Final invoice
Building Control
NICEIC
Commencement card
HR7
Completion card
Other:
Completed on Site:
06/02/2006
Snag list
Completed and Paid:
06/02/2006
Main Grant:
Grant Type:
Overall Cost:
Grant:
Simultaneous Grant
S.Grant Type:
S.Overall Cost:
S.Grant:
TOTAL GRANTS
Client Portion Amount:
Date Received:
06/02/2006
FOLD Interest

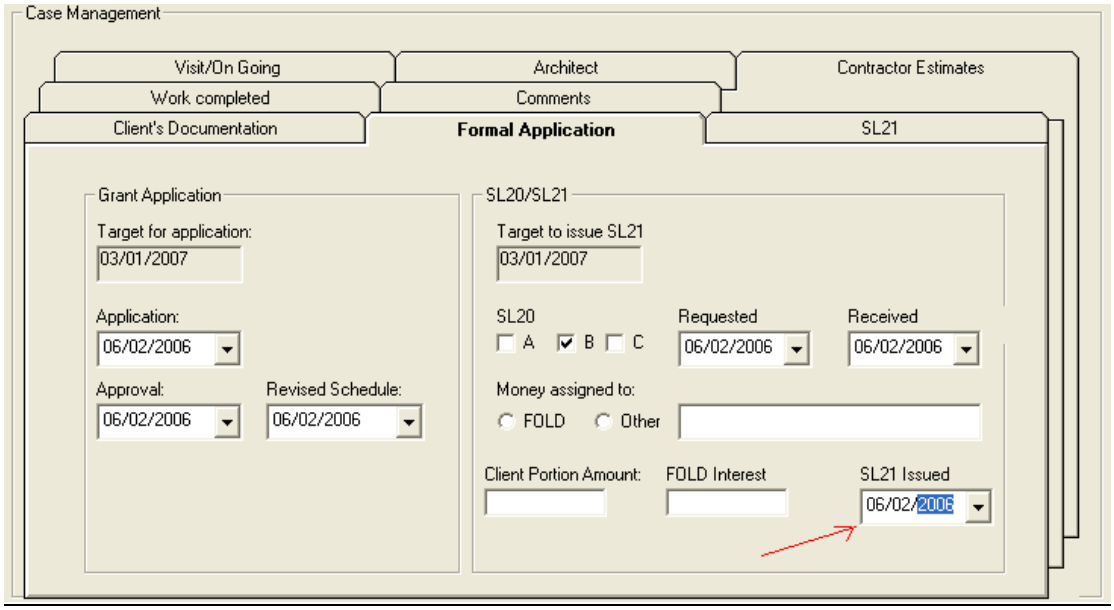

Case Management
Client's Documentation
Formal Application
SL21
Visit/On Going
Architect
Contractor Estimates
Work completed
Comments
New Comment
This is a comment
Previous comments

9.5 CMS01_RQ503 Case attention based on reminders

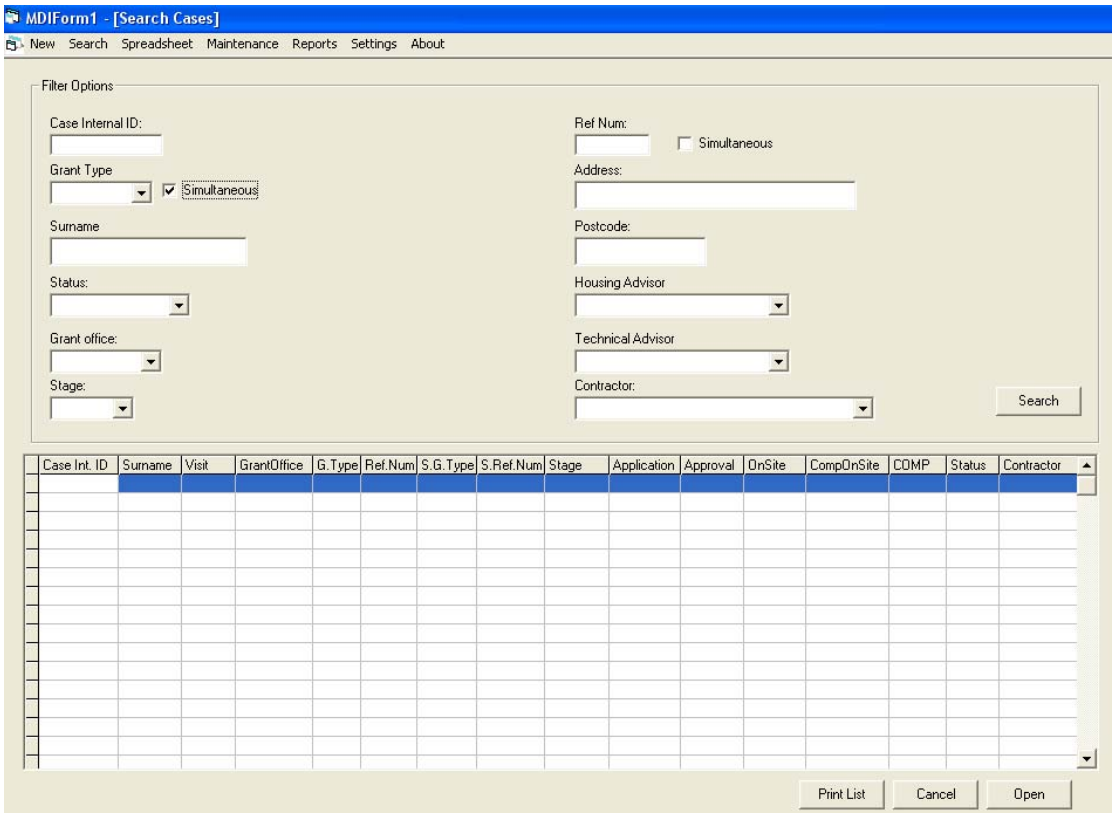


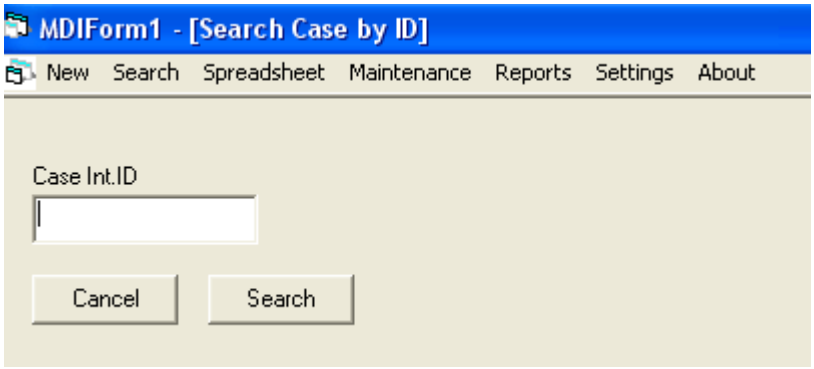


9.6 CMS01_RQ504 Automatic notification delivery

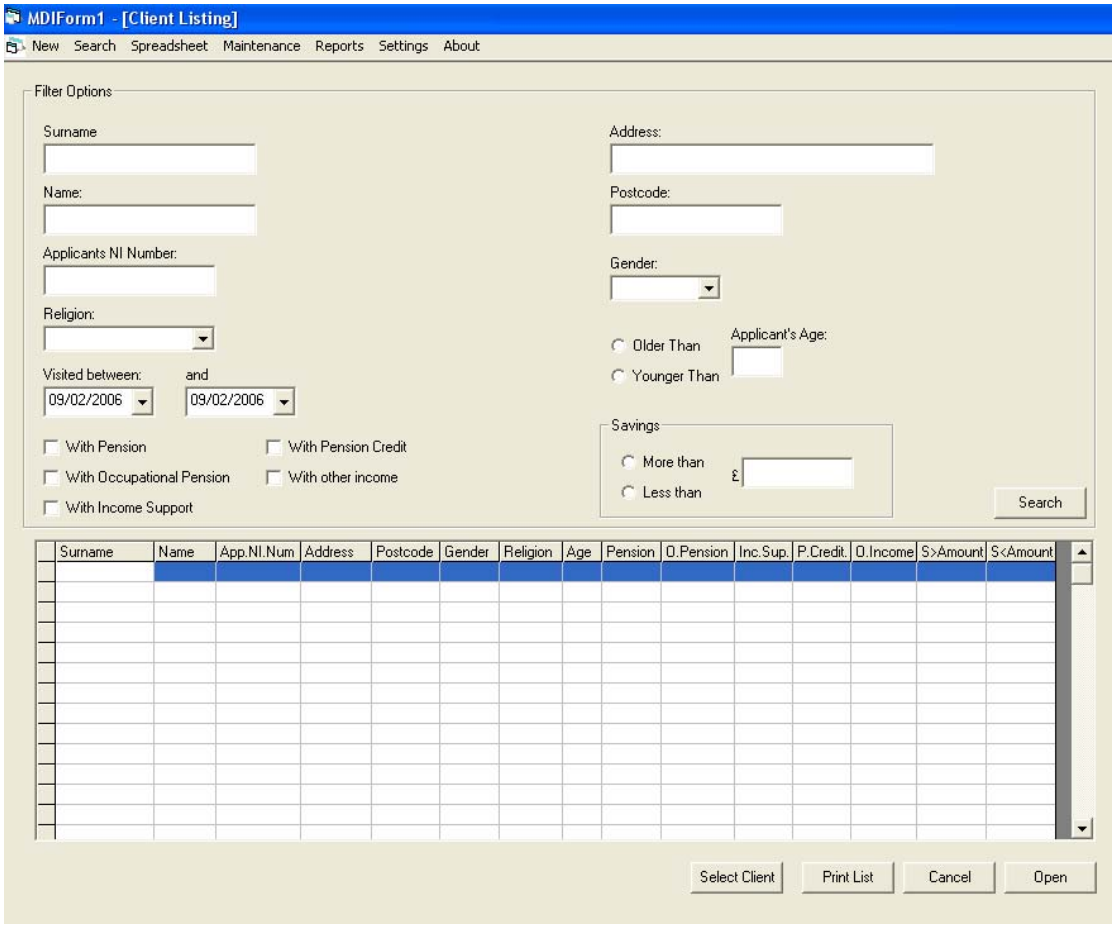


9.7 CMS01_RQ505 Case Searching capabilities

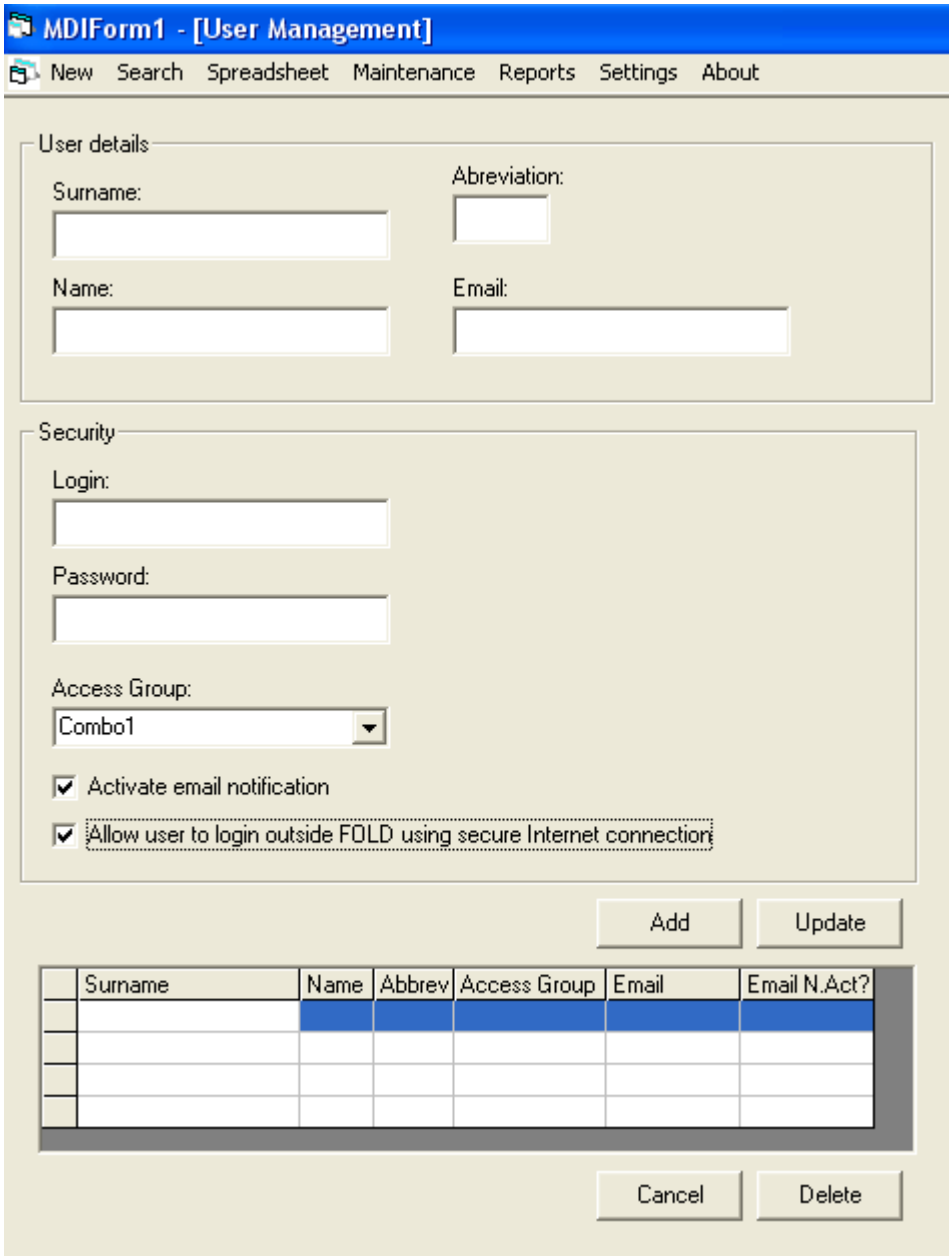




9.8 CMS01_RQ602 Client searching & listing

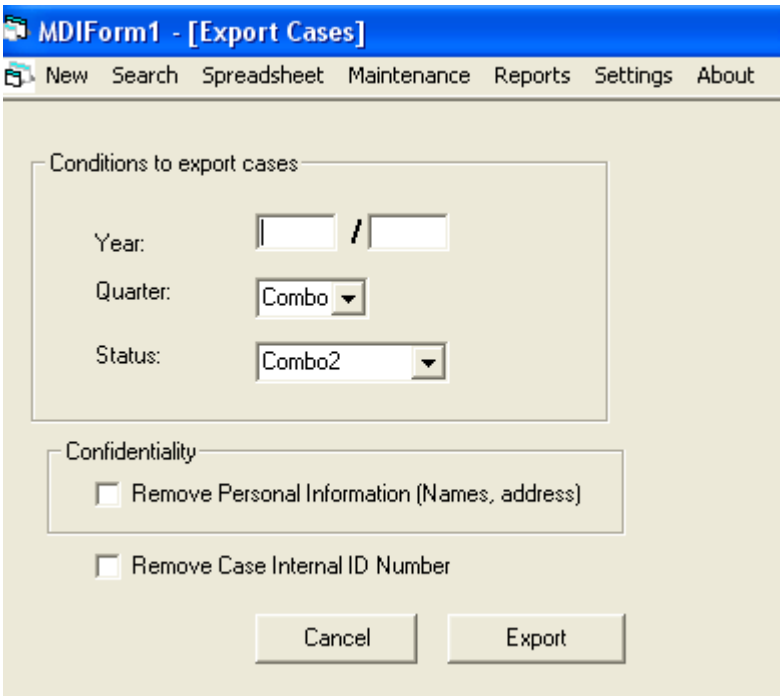


9.9 CMS01_RQ506 User management & security

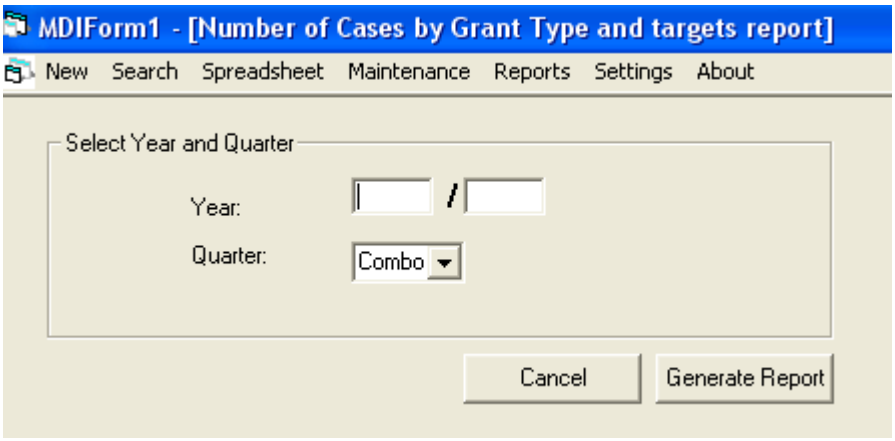



CAMS - Login
User:
rharper
Password:
****
Exit
Logon

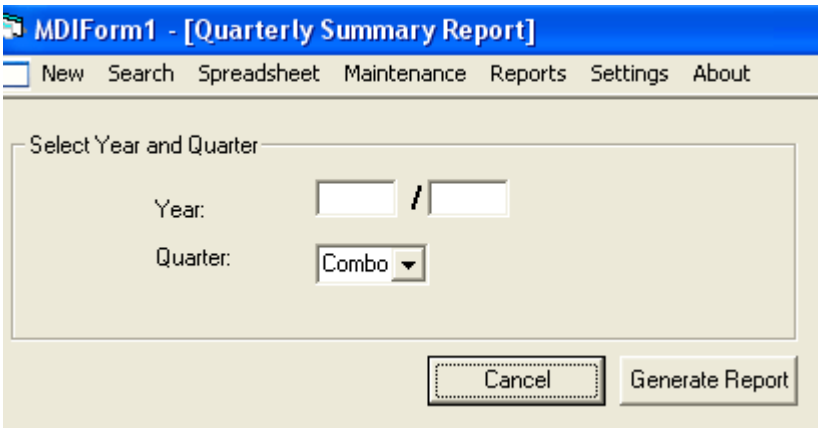
9.13 CMS01_RQ510 Export to excel



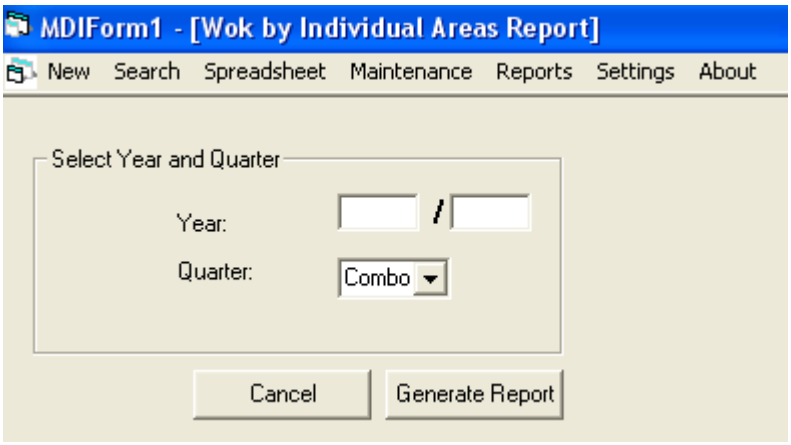
9.14 CMS01_RQ512_1 - Number of cases with target met/not met per grant type report



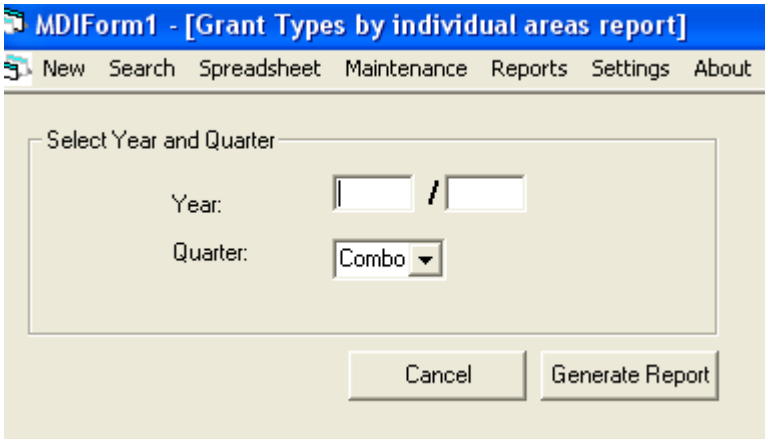
9.15 CMS01_RQ512_2 - Quarterly summary report



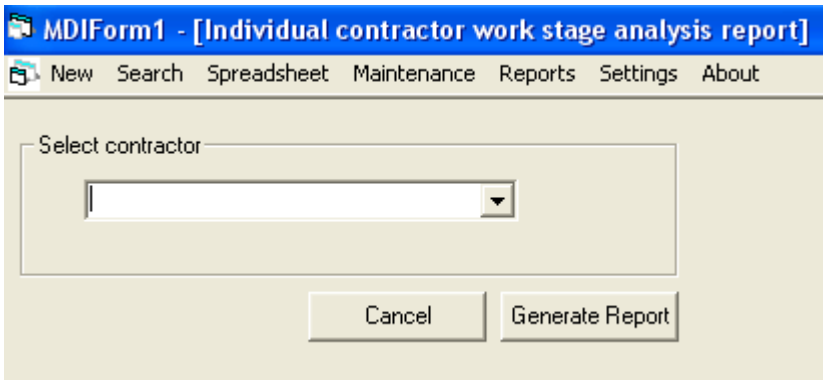
9.16 CMS01_RQ512_3 - Work by individual areas report



9.17 CMS01_RQ512_4 - Grant types by individual areas report

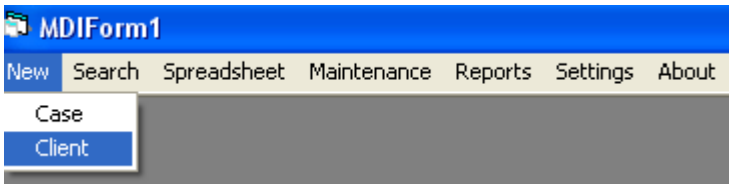


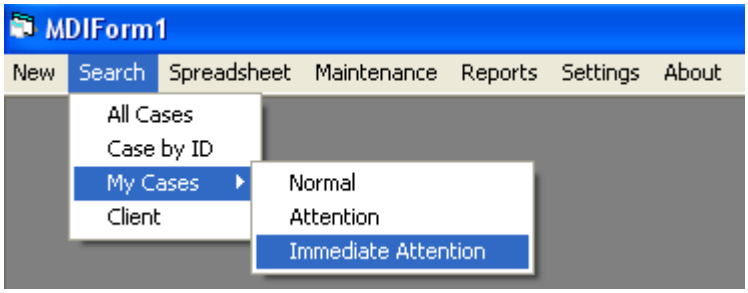
9.19 CMS01_RQ512_6 - Individual contractor work stage analysis report

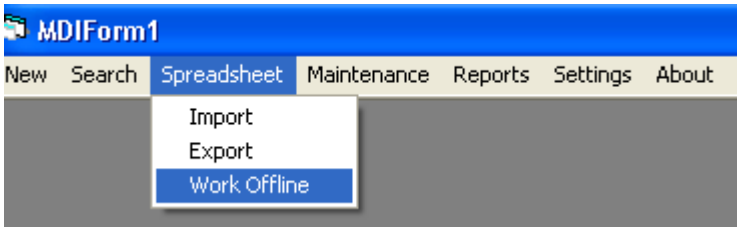


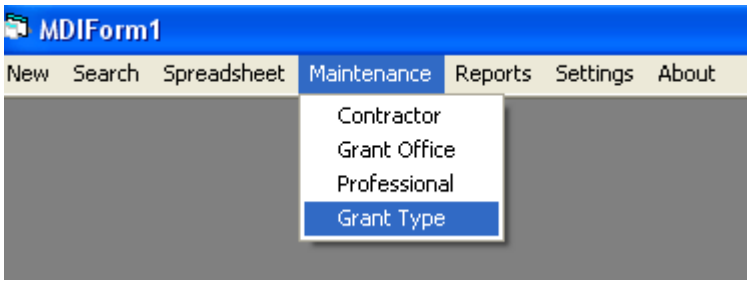
APPENDIX

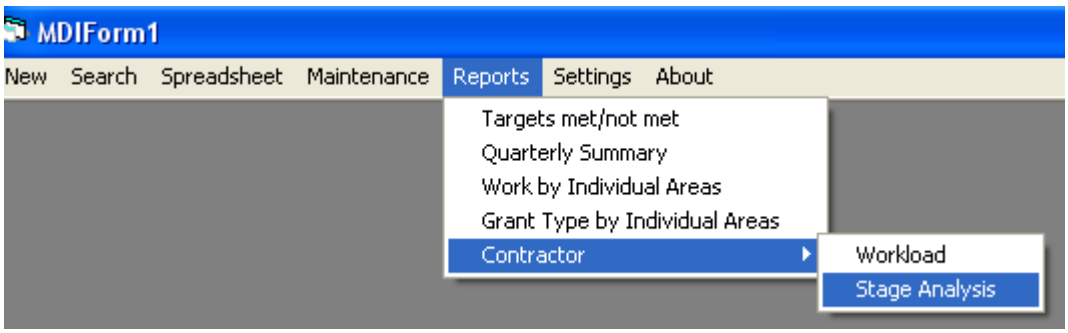
Menu Tree

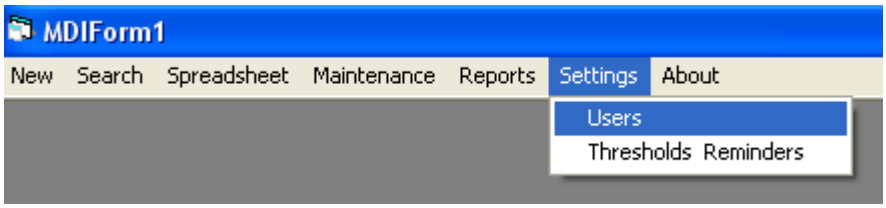











MDIForm1
New
Search
Spreadsheet
Maintenance
Reports
Settings
About
Users
Thresholds
Reminders