



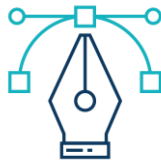
**FIVEPOINT**  
SOLUTIONS

# New Data Tools for CaseWorX

2022 CACJ Conference



LISTEN



DESIGN



DEVELOP



MAINTAIN



DELIVER

# Presentation Outline

- Repository Updates
  - New required data
  - MAT, Overdoses, If/Then fields
- Other CaseWorX Enhancements
  - Financial Registry: Bulk data entry
  - Participant Transfer
  - Dependents and Family Case Tracking
- New Ad Hoc Reporting Tool: Exago
  - How to build an Express Report
  - How to filter and organize a report
  - How to add graphics to a report
  - How to save a report
- Q&A

# Repository Updates

## REQUIRED for all participants:

- Participant Gender (new list values)
- Sex at Birth (new field)
- Participant Race (new list values)
- Ethnicity (new field)

## Required for all ACCEPTED participants:

- Entry Income Level
- Entry Employment Status

## Required for all EXITING participants:

- Exit Income Level
- Exit Employment Status

### Demographics and Identifying Information

Race:	Black/African American
Gender:	Male
Sex at Birth:	Male
Weight:	
Ethnicity:	

### Income Resource

Search... Widget Height

	Income Level Start Date	Primary Source Of Income	Annual Income Level	Income Level End Date
☰	08-01-2022	Salary/Wages	\$15,000-\$19,999	09-01-2022
☰	09-01-2022	Salary/Wages	\$20,000-\$24,999	

# MAT and Overdoses

Reporting data on both current MAT prescription and prior MAT.

MAT					
Referral Date	MAT Approved?	Type	Start Date	End Date	
01-01-2020	Yes	Methadone	02-01-2020	04-01-2020	
07-01-2022	Yes	Blend of Buprenorphine and Naloxone	08-03-2022		

MAT

MAT Referral: 07/01/2022	MAT Denial:	MAT Prescribed: Blend of Buprenorphine and Naloxone
MAT Start Date: 08/03/2022	MAT Delivery Method: Extended release injectable	MAT Compliance:
MAT End Date:	MAT Screened: No	MAT Completion:
Prior MAT: Yes		

[Restore](#)

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PRIOR MAT


Prior MAT	0 Record(s) Found	Prior MAT Prescribed Methadone	Prior MAT Duration 61	Prior MAT Completed No
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[Restore](#)


# Overdoses Widget

**Overdoses**


Overdose Date: 07-01-2022  









Overdose Substance: Prescription Opioids 

Overdose Location:

Naloxone Administered?: Yes 

Naloxone Type:



Overdose Death?: Select 

Notes: **B I U**  Normal     H1 H2   A 

**Add Overdose**

Search...

- SELECT** None
- SELECT** Alcohol
- SELECT** Amphetamines
- SELECT** Approved Meds
- SELECT** Crack/Cocaine
- SELECT** Crack/Cocaine
- SELECT** Ecstasy/MDMA
- SELECT** Hallucinogens

Rows per page: 25 1-20 of 20  

**CLOSE**

# Financial Registry: Bulk Data Entry

The screenshot displays the CaseWorx v3.5.0.1059 web application interface. The browser address bar shows the URL `accmtest.myfivepoint.com/CaseWorxQA/`. The application header includes the CaseWorx logo and navigation options: `ADD NEW CALENDAR EVENT`, `TODAY`, and `MONTH`. The main content area shows a calendar for September 2022, with the date `22` highlighted in a blue circle. The calendar grid is as follows:

SUN	MON	TUE	WED	THU	FRI	SAT
28	29	30	31	Sep 1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	Oct 1

The sidebar on the left contains the following navigation items: `Participant`, `Events`, `Program Management`, `Court Configuration`, `Reports`, `Administration`, `Document Library`, and `Team Meetings`. The `Court` dropdown menu is set to `14th Circuit`. A circular profile picture of Amanda Lewis is visible on the right side of the interface.

# Participant Transfer

The screenshot displays the CaseWorx v3.5.0.1059 web application interface. The browser address bar shows the URL `accmtest.myfivepoint.com/CaseWorxQA/`. The main content area features a calendar for September 2022, with the date 22nd highlighted. The sidebar on the left contains a navigation menu with the following items: Participant, Events, Program Management, Court Configuration, Reports, Administration, Document Library, and Team Meetings. The top right of the calendar area includes buttons for 'ADD NEW CALENDAR EVENT', 'TODAY', and a 'MONTH' dropdown menu. On the right side of the interface, there is a circular profile picture of Amanda Lewis.

# Dependents and Custody Tracking

**Dependents Case**

Search

First Name ▾ Last Name ▾ Gender ▾ DOB ▾

Baby Hickman Male 09-02-2022

**Dependent Custody Tracking**

Custodians Search... Widget Height

Status Category	Status Type	Custody Start Date	Custody End Date	Notes
Dependency	Family Preservation	09-05-2022		
Custody Status	Partial	09-05-2022		
Custody Type	Alternative care placement - other parent	09-01-2022		

**Dependent Custody Tracking**

Status Category Custody Type

Status Type

Custody Start Date

Custody End Date

Notes

- Living with parent
- Living with spouse
- Living with family
- No longer in home
- Alternative care placement - emergency
- Alternative care placement - foster care
- Alternative care placement - other parent

**Dependent Custody Tracking**

Status Category Custody Status

Status Type

Custody Start Date

- Full
- Partial
- Supervised visitation
- No contact



# Exago

The screenshot displays the CaseWorx v3.5.0.1059 web application interface. The browser address bar shows the URL `accmtest.myfivepoint.com/CaseWorxQA/`. The main content area features a calendar for September 2022, with the current date, the 22nd, highlighted in a blue circle. The calendar grid shows dates from 28th to 30th of September and 1st of October. A sidebar on the left contains navigation options: Court (1st Circuit), Participant, Events, Program Management, Court Configuration, Reports, Administration, Document Library, Team Meetings, and Transfer. A user profile for Amanda Lewis is visible on the right side of the interface.

# Questions

