

NAVIGATION EXERCISE

Basic Navigation, My Caseload, To Do List, and Assessment Lists

LINKS PANEL

1. Click the **P&P manual** icon () in the User panel and expand the Reunification link in the left panel.

How many subcategories are available? _____

2. Close the tab. Open the document library from the **Links** panel. Open the icon legend. What do each of these icons mean?

	
	
	
	
	

Close the tab before continuing.

MY CASELOAD

3. Return to My Caseload. What was the date of Maria Conseco's referral? _____

4. How many cases/referrals have an incomplete assessment? _____

5. How many cases/referrals have an overdue assessment? _____

TO DO LIST

6. Which assessment is due next, and for whose case/referral? What is the due date?

Assessment: _____

Case/Referral: _____

Date: _____

7. Click the **Name** toggle. Which case/referral has the most overdue assessments?

ASSESSMENT LISTS

8. Open Adam Harding's assessment list and look at the information panel. What is his case type? How many relatives also have cases?

Case type: _____

Relatives: _____

9. Open Adam's case timeline. Filter to Service Component. When did Adam's most recent service component start?

10. Select All Events from the Events Filter. What was the allegation associated with Adam's removal?

11. Look again at Adam's information panel. From the Related Clients section, open Nelson's assessment list. What is the date of the initiating referral for Nelson?

12. Open Ann's assessment list. (Her name is a link next to Initiating Referral.) Does she have any overdue assessments? What was the allegation? Was it substantiated?

Overdue? _____

Allegation: _____

Substantiated? _____