



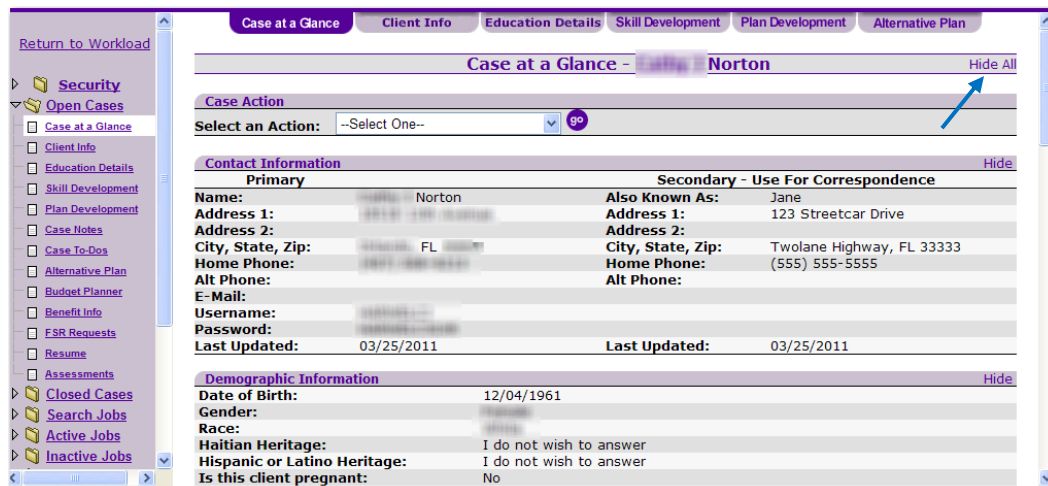
Case at a Glance

The Case at a Glance screen provides the case manager with a full view of the participant’s information on one page. The Case at a Glance screen is the first page the case manager sees once they have navigated to the participant’s case.

To access the Case at Glance screen, you must have an OSST account, User ID and password. If you do not have an account, user ID and password, you should contact your local Regional Security Office (RSO). If you are a RSO and you do not have a user account, please contact the Department of Economic Opportunity’s (DEOs) Internal Security Unit.

The Case at a Glance screen is mostly a display screen and edits usually cannot be made directly on the page. You have the ability to take some case actions on the case from the Case at a Glance screen but most of the page is view only.

1. Once you have navigated to the customer’s case, the Case at a Glance is the default page. To learn more about how to access a participant’s case, go to the [Navigating to a Case](#) step guide. Once you have navigated to the participant’s case, the screen will display; however, users have the ability to collapse the expanded sections on the page by selecting the “Hide All” link found on the upper right-hand corner of the page.



2. Selecting the “Hide All” hyperlink collapses the sections on the page (see illustration that follows). Notice that the wording in the upper right-hand corner of the page changes from “Hide All” to “Show All.”



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3. Now we will discuss the section of the screen where you can take action. Under the “*Case Action*” section of the page is a dropdown box that offers case action options. The dropdown shows the following options:
- Reassign to another case tracker – this selection allows you to reassign the case to another case manager in your unit;
 - Close this case – this selection starts the process for you to close the case if the case is open. If the case is closed, you will see the option to “*Open this case;*”
 - Change Status to Applicant – this selection allows you to change the case status to applicant. You will not see this option if the case is already an applicant;
 - Change Status to Transitional – this selection allows you to change the case status to transitional. You will not see this option if the case is already transitional.



Next, we will discuss the different sections of the Case at a Glance screen.

Contact Information

1. The “*Contact Information*” section of the screen contains basic information about the customer. This includes information such as name, address, phone number, and secondary contact information, if it exists. The Contact Information section also contains the customer’s One Stop Service Tracking (OSST) user ID and a field that indicates whether or not a password exists. If a password exists, it is not visible to system users. The section also has a “Last Updated” date that shows when the contact information was last updated. You also have the ability to hide this section and other individual sections of the screen.

Contact Information		Hide
Primary	Secondary - Use For Correspondence	
Name:	Norton	Also Known As: Jane
Address 1:		Address 1: 123 Streetcar Drive
Address 2:		Address 2:
City, State, Zip:	FL	City, State, Zip: Twolane Highway, FL 33333
Home Phone:		Home Phone: (555) 555-5555
Alt Phone:		Alt Phone:
E-Mail:		
Username:		
Password:		
Last Updated:	03/25/2011	Last Updated: 03/25/2011

In the next illustration, we selected hide for this section of the screen. The Contact Information section of the page displays in the collapsed view, however, the section directly beneath it is not hidden.

Case at a Glance - Norton		Hide All
Case Action		
Select an Action:	--Select One--	go
Contact Information		Show
Demographic Information		Hide
Date of Birth:	12/04/1961	
Gender:		
Race:		
Haitian Heritage:	I do not wish to answer	
Hispanic or Latino Heritage:	I do not wish to answer	
Is this client pregnant:	No	
Pregnancy Due Date:		
Customer a Refugee:	No	
Customer an ABAWD:	No	
Citizenship:		

Demographic Information

2. The “*Demographic Information*” section contains the customer’s date of birth, gender, race, heritage, pregnancy status and due date (if applicable), refugee status, *Able Bodied Adult without*



Dependents (ABAWD)¹ status and citizenship status. Most of the information comes over in the interface between OSST and the Department of Children and Families (DCF) system, FLORIDA. However, if you are creating a case in OSST, you will enter the information that displays on the Case at a Glance screen. As with the Contact Information section and other section of this screen, you have the ability to hide this section.

Demographic Information		Hide
Date of Birth:	12/04/1961	
Gender:		
Race:		
Haitian Heritage:	I do not wish to answer	
Hispanic or Latino Heritage:	I do not wish to answer	
Is this client pregnant:	No	
Pregnancy Due Date:		
Customer a Refugee:	No	
Customer an ABAWD:	No	
Citizenship:		

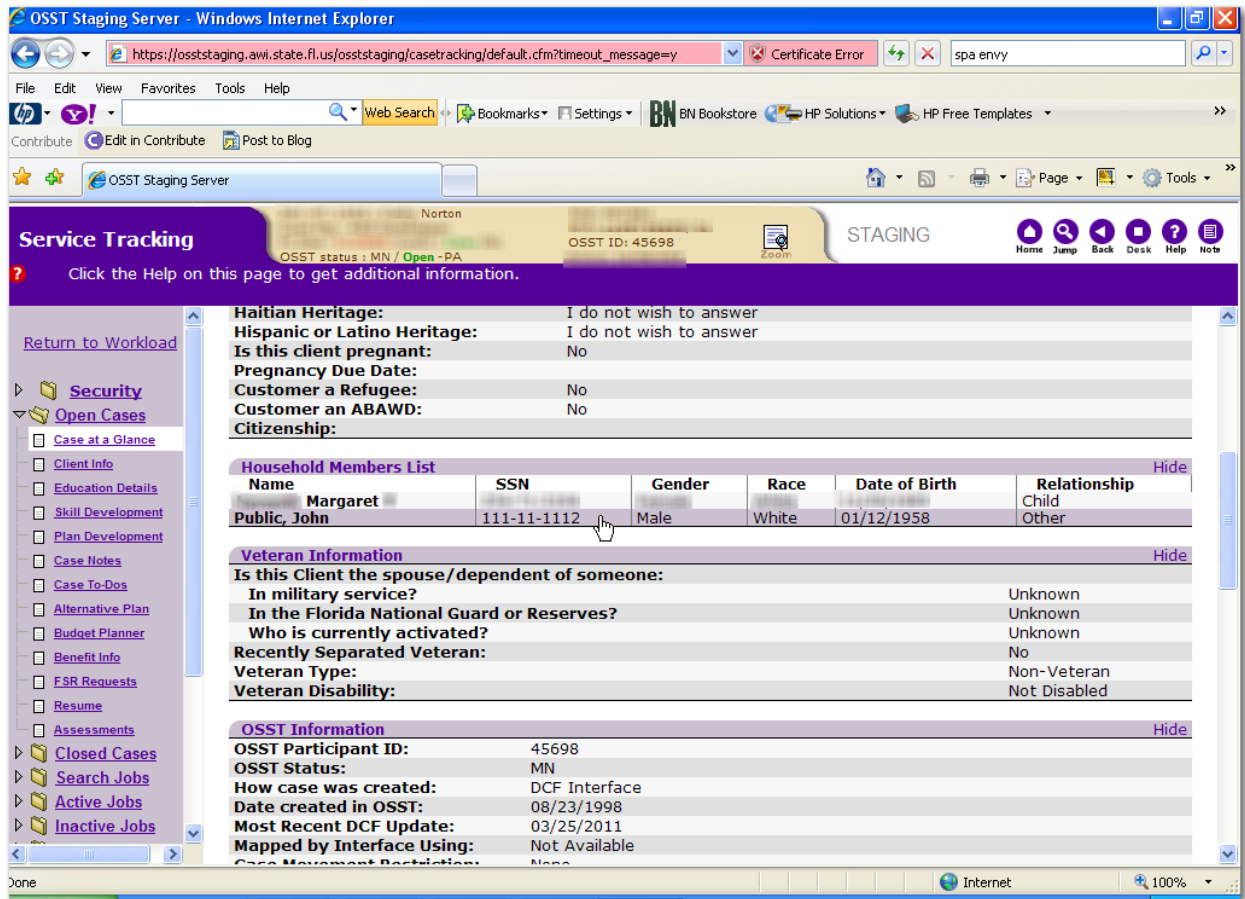
Household Member List

- The “*Household Member List*” section of the screen contains information about other people in the customer’s household. This information will come from the FLORIDA system during the FLORIDA to OSST when the case is created or updated by the nightly interface. If you are creating the case in OSST, you will complete this information. The household member list includes the member’s name, social security number (SSN), gender, date of birth, and relationship to the customer.

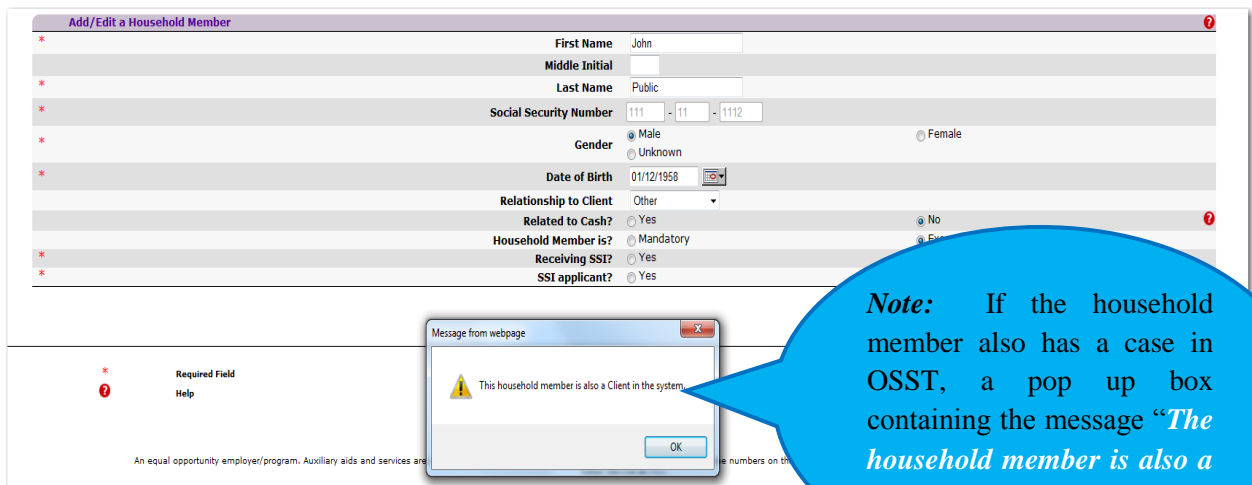
Household Members List						Hide
Name	SSN	Gender	Race	Date of Birth	Relationship	
Margaret		Female			Child	
Public, John	111-11-1112	Male		01/12/1958	Other	

- The Household Member List section of the page is partially interactive. If you click on a household member name from the Case at a Glance screen, you will be directed to the screen to edit information for a household member. See the following steps.

¹ Able-Bodied Adult without Dependents or **ABAWD** is an individual who is required to participate in Supplemental Nutrition Assistance Program (SNAP) Employment and Training program when it is mandatory.



Clicking the household members name directs you to the screen that displays information about that particular household member.



Note: If the household member also has a case in OSST, a pop up box containing the message "The household member is also a Client in the system"



Household member’s information includes.

- Name
- Social Security Number
- Gender
- Birth date
- Relationship to the Client – is the relationship status of the household member to the customer on the case.
- Related to Cash –tells the user whether or not the household member is part of the cash assistance group.
- Household Member Is – tells the user if the household member is a mandatory participant or if they are exempt from program participation.
- Receiving SSI – tells the user whether or not the household member is receiving SSI.
- SSI Applicant – tells the user whether or not the household member has applied for SSI.

**Note: Household member information including questions with yes or no responses is automatically populated when the case is created via the FLORIDA to OSST interface. If the user is adding the household member, all of the information must be entered manually.

Veteran Information

This section provides veteran information for the customer and asks the following questions:

Is this Client the spouse/dependent of someone:

- In Military Service?
- In the Florida National Guard or Reserves?
- Who is currently activated?

*These questions specifically address whether the customer a spouse or dependent. The next two questions are specific to whether the customer is:

- A recently separated veteran
- Veteran type
- Veteran Disability

Veteran Information		Hide
Is this Client the spouse/dependent of someone:		
In military service?		Unknown
In the Florida National Guard or Reserves?		Unknown
Who is currently activated?		Unknown
Recently Separated Veteran:		No
Veteran Type:		Non-Veteran
Veteran Disability:		Not Disabled



Unlike household member information, Veteran information is not automatically generated if the case was created via the FLORIDA to OSST interface. The information WILL NOT automatically populate since DCF does not require this type of information in their system for determining benefits. All answers will default to “unknown” until the information is edited by staff during work registration in OSST or when the information is updated on the Client Info screen.

OSST Information

Information specific to the participant’s OSST case displays under the OSST information section.

OSST Information		Hide
OSST Participant ID:	45698	
OSST Status:	MN	
How case was created:	DCF Interface	
Date created in OSST:	08/23/1998	
Most Recent DCF Update:	02/07/2013	
Mapped by Interface Using:	Not Available	
Case Movement Restriction:	None	
Client authorized to use OSST?	No	

- **OSST Participant ID** – is an identifier unique to the participant. The OSST Participant ID is randomly assigned by OSST when a case is created.
- **OSST Status** – is the participant’s current OSST case status. In the example, the status is MN which stands for mandatory. This means that the customer is a mandatory participant. Other case statuses include: **AP** – applicant and **TS** – transitional
- **How case was created** – tells the user whether the case was created by manually by work registration or through the DCF Interface. Cases created via the interface will display **DCF Interface**, whereas cases created manually will display **OSST Work Registration**.
- **Date Created in OSST** – displays the date of when the case was originally created.
- **Most Recent DCF Update** – displays the date of the last time the OSST record was updated by the DCF Interface
- **Mapped by Interface Using** – displays the zip code that was used in determining what region, county and unit (R/C/U) to send the case to based on the region’s mapping request. Cases that have not been updated via the interface since the Case at a Glance screen has been updated will display “Not Available” in this field. Similarly, cases that are created by OSST Work Registration where no update has occurred on the case from DCF will display “Not Available” for the case until there is an interface record.
- **Case Movement Restriction** – gives the user the ability to determine if a specific case, regardless of zip code mapping, should go to a unit other than the designated unit based on the region’s zip code mapping. For example, a case manager with a special population such as those with medical limitations may work those cases in 1/37/9999 and every medial case in the region is placed in this unit. By selecting to restrict the case movement, the user is instructing the system to make sure the case returns to 1/37/9999 every time it reopens from being closed even if the customer’s zip code has them mapped to a 1/37/400. To set the case restriction, the user will update it on the Client Info page.



Other Important Information

The two questions under this section address whether customer is registered with **Selective Service** and asks the user to provide the **Selective Service Registration Number**.

Other Important Information Hide	
Registered with Selective Service:	
Selective Service Registration Number:	

Remember: Case-at-a Glance is a display page. This information may be updated by visiting the participant’s Client Info page and making the applicable changes.

Cash Assistance Time Limit Information

The *Cash Assistance Time Limit Information* section provides information about the participants Temporary Cash Assistance (TCA) time limits, if applicable. This information comes from FLORIDA, but can be edited by Regional Workforce Board (RWB) staff. The information that comes over from FLORIDA is information from the system’s ARCA screen, where information about time limits is housed. Since the DCF worker must update this information, the data that comes over from FLORIDA is based on the last update made by the DCF Economic Self-Sufficiency Specialist or ESS. If the information is available, the ARCA update date, time limit, number of months used and through date will be populated.

Cash Assistance Time Limit Information Hide	
Date ARCA was updated	<input type="text"/>
* Time Limit	Months in Track: <input type="text"/> Remaining: <input type="text"/>
Number of Months Used	<input type="text"/>
* Through Date	<input type="text"/>

Remember: RWB staff may edit this information in OSST. However, this information should be used to guide case managers to provide program services to customers based on their goals, skills, education level and the estimated number of months the customer has left in their 48 month time-limited assistance. To update this section, staff is encouraged to review the information on FLORIDA’s ARCA screen. To learn more about how to update the cash assistance time limit information, please review the Client Information guide.

Employment Information

- The last section on the Client Info page is the *Employment Information* section. This section focuses on the participant’s employment status including: has the participant received a notice of layoff or separated from the military, is the participant looking for work, is the participant receiving reemployment assistance, is the participant a migrant seasonal farm worker, or is the participant a



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ⁱdisadvantaged worker. To edit this information, the user will go to the participant's Client Info page. To learn more about updating employment information, please review the Client Information guide.

Employment Information		Hide
Current Employment Status:	Full-Time	
Recently received a notice of termination or layoff from your job or received documentation that you are separating from the military:	No	
Date of Layoff or Military Separation:		
Currently looking for work:	Unknown	
Receiving Unemployment Insurance:	Unknown	
Migrant Seasonal Farm Worker:	Unknown	
Disadvantaged Worker:	Unknown	

ⁱ The term disadvantaged worker is used to describe individuals with varying obstacles that may make finding or obtaining employment more difficult than those who don't have the same obstacles or barriers. Someone without a high school diploma or lacks formal education can be considered disadvantaged.