

CAS 2.0 Quick Reference Guide

Add/Edit Resources to the CAS Resource Directory

The CAS 2.0 Resource Directory includes all resources nationwide. You will use it to document your regional resources. Always include enough specific information for each resource to limit the search to the right area.

Plan first so your region's workers can easily find resources useful for their local and regional clients.

See the [Recovery Seminars](#), for an overview of referrals.

Optional Method: One-Word Referral Search method

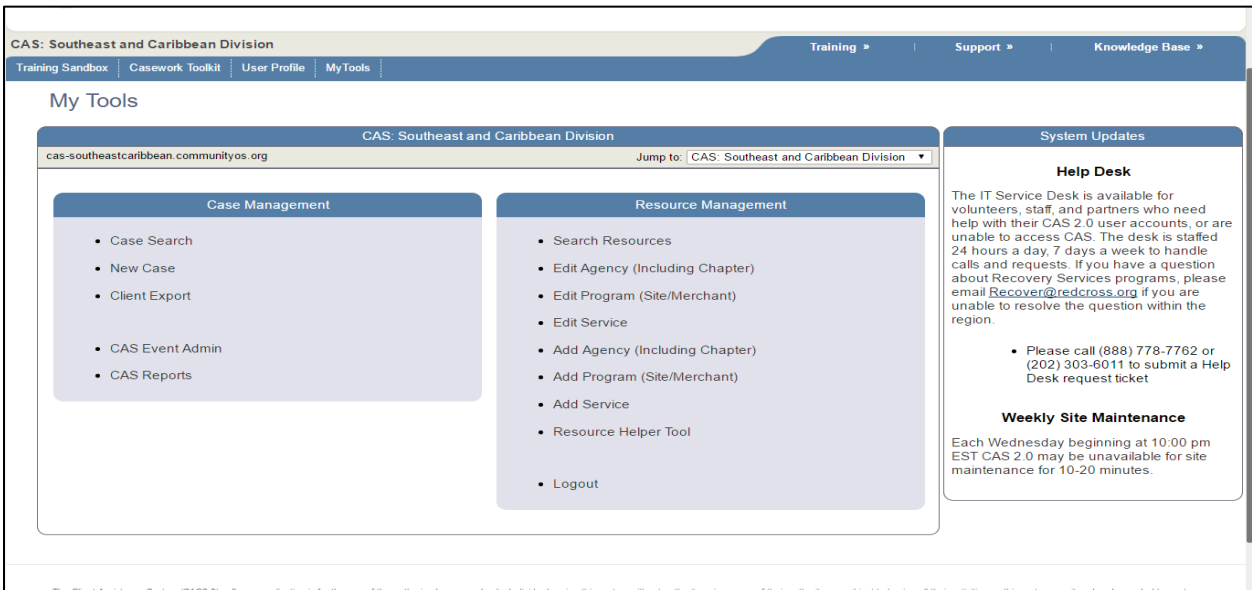
Core Concepts

- To use the **One-Word Referral Search method**, the **Service Area** is the most important information to place in the service organization's **Service Profile** entry in the CAS Resource Directory. It is placed into both the **Keywords** box and the **Area Served** box. This is the physical area served by the service organization whether expressed by counties served or by zip codes served. In a referral search, the client's zip code or county code will be matched with the service area of all the relevant service organizations.
 - To use this **One-Word Referral Search** method, your region must select a standard way to make up a code for the service area, by using either county boundaries or zip codes. Otherwise, resources which are not relevant will appear in your referral searches in the case.
- **By county:** a one word code made up of the county name affixed with the state code. Do not use abbreviations or punctuation in the code. This guarantees relevancy of the results.
 - **Example:** saintjohnthebaptistLA, for resources in Saint John the Baptist Parish, LA.
- **By zip or regional territory.** The code to use in the referral search must be evident from the client's case record.
 - Zip: When areas of service are routinely defined by the service organizations as zip codes, use those as the code. Enter the **client's zip code** from the case record into the **Keyword** box or the **Area Served** box. All the results would be relevant.
 - Zip and county: When an organization uses both the county boundaries and limits the service area to certain zip codes, use the zip codes within the Service Description of the Service Profile to define one of the eligibility requirements. The **county code** is used in the **Keyword** box or the **Area Served** box. **Example:** saintjohnthebaptistLA and the eligible zip codes are in the Service Description of the results. All the results would be relevant but some may exclude the client's zip code of residence.
 - Street names: When an organization brackets its service area to a set of street names, use those as eligibility requirements within the Service Description of the Service Profile. The **county code** is used in the **Keyword** box or the **Area Served** box.

- Do not use a system that relies on the use of a document to translate the service area into a code, such as translating a zip code into a territory code.
- **Keyword:** The client's county or zip/territory code entered in the **keyword** box of a referral search will return only those results which contains those codes for the **service area** in the resource's **service profile and which match the client's zip code or county code**. The client's county of residence code may be **saintjohnthebaptistLA** and the organization's service area includes Saint John the Baptist parish in Louisiana. This match will result in a referral hit.

Steps to add new resources using the One-Word Referral Search system.

NOTE: The instructions on the CAS Training Tab are for another method. **Don't use both.**



CAS: Southeast and Caribbean Division

Training * | Support * | Knowledge Base *

Training Sandbox | Casework Toolkit | User Profile | My Tools

My Tools

CAS: Southeast and Caribbean Division

cas-southeastcaribbean.communityos.org | Jump to: CAS: Southeast and Caribbean Division

Case Management

- Case Search
- New Case
- Client Export
- CAS Event Admin
- CAS Reports

Resource Management

- Search Resources
- Edit Agency (Including Chapter)
- Edit Program (Site/Merchant)
- Edit Service
- Add Agency (Including Chapter)
- Add Program (Site/Merchant)
- Add Service
- Resource Helper Tool
- Logout

System Updates

Help Desk

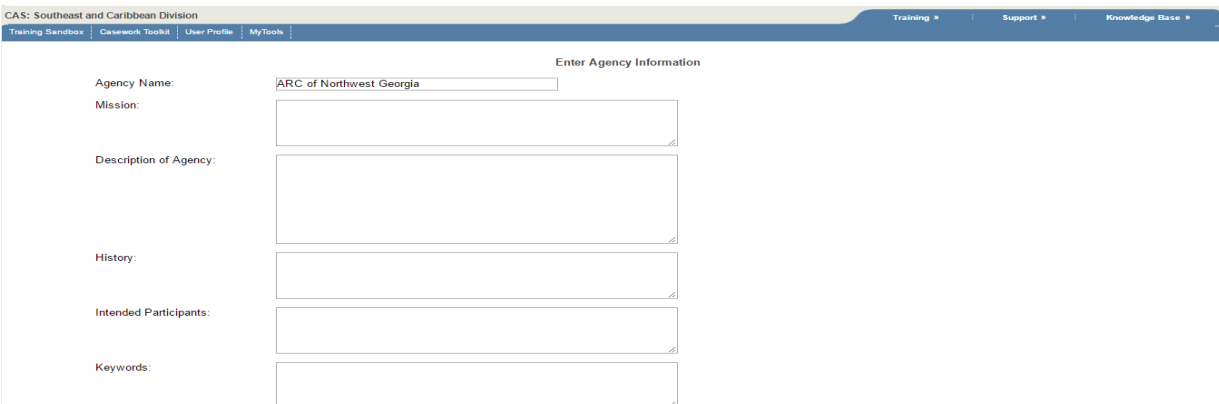
The IT Service Desk is available for volunteers, staff, and partners who need help with their CAS 2.0 user accounts, or are unable to access CAS. The desk is staffed 24 hours a day, 7 days a week to handle calls and requests. If you have a question about Recovery Services programs, please email Recover@redcross.org if you are unable to resolve the question within the region.

- Please call (888) 778-7762 or (202) 303-6011 to submit a Help Desk request ticket

Weekly Site Maintenance

Each Wednesday beginning at 10:00 pm EST CAS 2.0 may be unavailable for site maintenance for 10-20 minutes.

The Client Assistance System (CAS) software application is for the use of the authorized personnel only. Individuals using the system without authority or in excess of their authority are subject to discipline as their activities on this system monitored and recorded by system.



CAS: Southeast and Caribbean Division

Training * | Support * | Knowledge Base *

Training Sandbox | Casework Toolkit | User Profile | My Tools

Enter Agency Information

Agency Name:

Mission:

Description of Agency:

History:

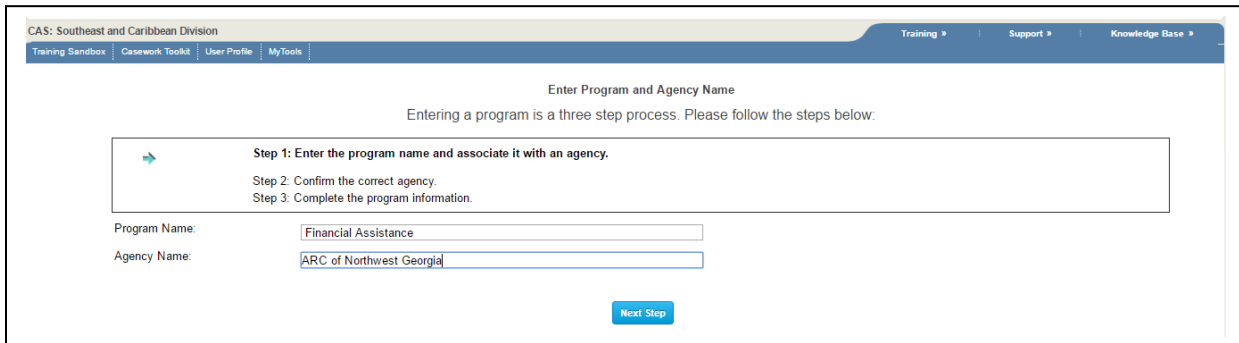
Intended Participants:

Keywords:

A. Add Agency: Enter Agency Profile:

1. **Agency Name:** a Chapter or Regional name in a standard form. Find your chapter's official name: it is next to "Restrict by My Agency Affiliation" near the bottom of the **Referral Search** box. That official name is locked, centrally set (through FOCIS) and resources attached to it can't be edited or deleted. Use instead a variation of that name such as ARC in place of American Red Cross. Create an agency name for resources that are local to the chapter, and one for resources that are considered Regional (i.e., ARC of Northwest Georgia & GA Regional Resources).
2. **Aliases:** Add the **chapter number** for the resource in the agency profile so a referral search using the chapter number as the **keyword** will find every resource in CAS that belongs to the chapter. It makes the process of discovering all the CAS resources in a chapter extremely simple using the Edit Service function. This supports a DRO situation where caseworkers are not familiar with local resources.
3. **Update cycle:** At least annual.
4. **Status:** Change to **Active**.
5. **Leave all the other fields blank.**
6. Select "**Save Agency,**" at the bottom.

B. Add Program: Enter Program Profile



CAS: Southeast and Caribbean Division

Training | Support | Knowledge Base

Training Sandbox | Casework Toolkit | User Profile | MyTools

Enter Program and Agency Name

Entering a program is a three step process. Please follow the steps below:

- Step 1: Enter the program name and associate it with an agency.
- Step 2: Confirm the correct agency.
- Step 3: Complete the program information.

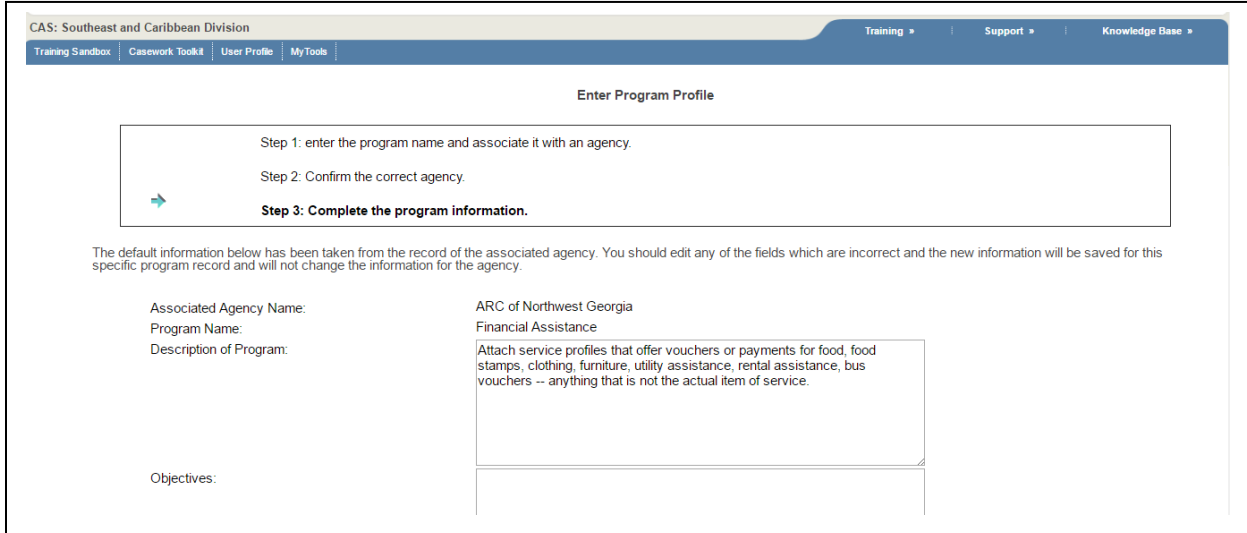
Program Name:

Agency Name:

[Next Step](#)

1. **Program Name:** The program names are similar to the Disaster Categories located in the Referral Search. Choose one for the Program Name box.
2. Enter the **Agency Name** chosen based on the resource being local to the chapter or regional and click **Next Step**.

3. Select the radio button for the Agency Name.



CAS: Southeast and Caribbean Division

Training ▾ | Support ▾ | Knowledge Base ▾

Training Sandbox | Casework Toolkit | User Profile | My Tools

Enter Program Profile

Step 1: enter the program name and associate it with an agency.
 Step 2: Confirm the correct agency.
 Step 3: **Complete the program information.**

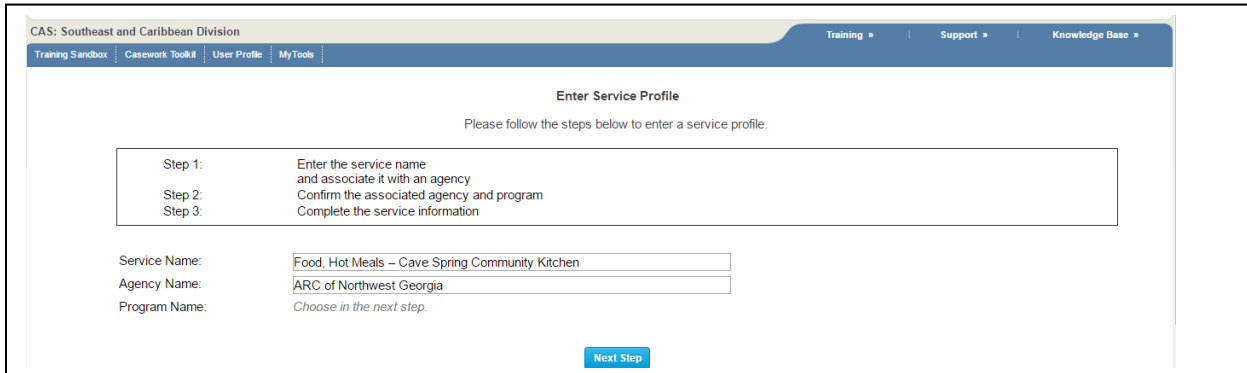
The default information below has been taken from the record of the associated agency. You should edit any of the fields which are incorrect and the new information will be saved for this specific program record and will not change the information for the agency.

Associated Agency Name: ARC of Northwest Georgia
 Program Name: Financial Assistance
 Description of Program: Attach service profiles that offer vouchers or payments for food, food stamps, clothing, furniture, utility assistance, rental assistance, bus vouchers -- anything that is not the actual item of service.
 Objectives:

4. **Aliases** and the **Update Cycle** will be copied (or “cascade”) from the Agency profile.
5. **Description of Program:** the service type(s) attached to this program.
6. **Status:** Change to **Active**.
7. Leave all **other fields blank**.
8. Click **“Save Program”** at the bottom.

C. Add Service: Enter Service Profile

1. **Enter Service Name:**



CAS: Southeast and Caribbean Division

Training ▾ | Support ▾ | Knowledge Base ▾

Training Sandbox | Casework Toolkit | User Profile | My Tools

Enter Service Profile

Please follow the steps below to enter a service profile.

Step 1: Enter the service name and associate it with an agency.
 Step 2: Confirm the associated agency and program.
 Step 3: Complete the service information.

Service Name: Food, Hot Meals – Cave Spring Community Kitchen
 Agency Name: ARC of Northwest Georgia
 Program Name: Choose in the next step.

Next Step

- **Service Name** is the appropriate disaster category, from the list in the CAS Referral Search box (see page 8) plus the name of the organization separated by a hyphen. This format keeps all similar resources grouped together in alphabetical order, in Referral Search results.
 - **Example:** Food – Cave Spring Food Pantry).
- Or use the Program Name, second program name – the organization name. It can be useful to add information to the end of the Program Name in this step.

- **Example:** Food, Hot Meals – Cave Spring Community Kitchen).
2. **Enter Agency Name** for this service, and click *Next Step*.
 3. Select the radio button for the appropriate **Program Name**, and click *Next Step*.
 4. **Aliases** and the **Update Cycle** will be copied (or “cascade”) from the Agency profile.
 5. **Description of Service:** Include **what** service is provided, **where** it is provided, **when** it is provided, and the **eligibility requirements** for the client. (You can find this on the CAS 2.0 Resource Directory Update Request, if your region uses this optional worksheet.) Other information may be added as necessary.
 - **Limit this to 250 characters**, so the referral search result will show all the information necessary for the client.
 - If you must include **more than 250 characters**, click on the blue link in the Service Name column to open a new webpage for the rest of the information. Close the webpage when finished.
 6. **Keywords:** Only enter the **service area** codes of the organization, because this keyword allows the referral search in CAS to be completely relevant to the client being served. There is no need to repeat any word that is already in the Description of Service for that resource.
 7. **Disaster Category:** Choose the appropriate category, which is the same as the beginning of the Service Name.
 8. **Location:** Select the **state** where the physical site is located.
 9. **Geographic Area:** Copy the keywords into this box.
 10. **Contact’s Phone:** The phone number is placed in this box; it will show up in the Service Name column of the Referral Search in CAS.
 11. **Physical Site Address 1:** This allows a search filter, “**Sort by Distance From Zip Code:**” to work.
 12. **Physical Site City:**
 13. **Physical Site State:**
 14. **Physical Site Zip:**
 15. Hours & Days of Operation:
 16. **Status:** change to **Active**.

17. Click “Save Service” **button**.

Associated Agency Name:	ARC of Northwest Georgia	Reassign Agency
Associated Program Name:	Clothing	Reassign Program
Service Name:	Thrift Shop.Clothing - Community Church Shop	
Service ID:	S1833671	
Description of Service:	Community Church Shop-Used clothes and small household goods, Monday through Friday from 10 a.m. to noon and Saturdays from 9:30 to 11:30 a.m. - 21 W. Main St. Cartersville, 770-382-8445	
Urgent Services Provided:		
Keywords:	Bartowga	
Service Class:	(select) ▼	
Disaster Category:	Clothing ▼	
	<input type="checkbox"/> Red Cross Resource	
Aliases:	11468	

Search tips:

- Filters:** When the resource’s **service area code** is placed in *both* the **Keyword** box and the **Geographic Area** box of the **Service Profile**, you build a powerful search method with filters.

 - Example:** a caseworker searching for baby clothes and baby formula for a client would place the client's **county code** into the Area Served box of the referral search. The **Keyword** box then becomes the filter.

Enter **baby** into the Keyword box and clicking Search to produce results from *every* resource within the geographic area that has **baby** in its Service Name, Program Name, Agency Name, Service Description, Related Concepts, Use Reference, Aliases, and Keywords.

They will be ordered by the number of times the word baby appears in the resource.

(Note: the word **infant** will **not** substitute since it isn’t in the Service Description. Be consist with the use of words that may be used for this **free text searching** style.)
- Search for all chapter resources:** In **MyTools**, use **Edit Service** to create a spreadsheet copy of all the resources in the chapter.

 - Type the chapter number into the Aliases box.
 - Click Show Profiles. All of the associated resources will show.
 - Copy and paste into a spreadsheet to sort and print.
- Search for all regional resources:**

 - Type the Agency name associated with the regional resources into the Associated Agency Name box.
 - Copy and paste into a spreadsheet to sort and print.
 - Example:** GA Region Resources (the agency associated with services available region- wide.

D. To edit or change a resource entry:

Why: a standard format makes searching easy for new or remote caseworkers.

1. Locate the resource.
2. You can edit a resource that is already created, and reassign a program or agency. Notice the zip code use here in the keywords field.
3. Then follow the same steps as before, completing **Service Area, Keyword, and Disaster Category** in a standard manner. Add other useful information.
4. Be sure **the resource status is active.**

Associated Agency Name:	Los Angeles Homeless Services Authority (LAHSA)	Reassign Agency
Associated Program Name:	Los Angeles Homeless Services Authority (LAHSA)	Reassign Program

Service Name:

Service ID:

Description of Service:

Urgent Services Provided:

Keywords:

Service Class:

Disaster Category:

Red Cross Resource

Aliases:

Location:

Geographic Area:

Later Resource Edits or Deletions in the Referral History of a case

Changing the Agency and Program of a Service will not affect the Referral History of cases except to rename the Agency shown in the case referral history. The procedure is simple and just requires creating the new Agency and its Programs before attempting the change.

Reference: Disaster Categories in the CAS Referral Search box

Child Care/Youth Services	Financial Assistance	Mass Care- Feeding
Clean-up & Debris Removal	Financial counseling	Mass Care- Shelter
Clothing	Food	Medical Assistance
Construction Services	Functional Needs	Pet Services
Damage Assessment	Funeral Assistance	Phone/Internet
Direct Services	General Social Services	Resiliency
Disaster Case Management	Government Assistance - Federal	Translation Services
Disaster Casework	Government Assistance - State/local	Transportation
Donations Mgmt. /Warehousing	Hazard Mitigation/Mold	Veteran Services
Education/Job Training	Hotel/Temporary Housing	Volunteer Coordination
Elder Care	Household Goods – Furniture	
Emergency Food/Water	Household Goods - Other	
Emotional/Spiritual Care	Housing	
Employment	Legal Aid	
Finance/Loan Support/Counsel	Mass Care- Bulk Distribution	