

## Social Services Client Logic

### How SSE Pulls in Clients in the All Purpose Navigation

CaseWorks follows a set of steps to determine the primary participant. The updated logic includes improved considerations for:

- The middle name and middle initial
- Jr., Sr., and other suffixes
- If there is no match in the Description field for the last name (matches only based on the first name if no last name match is present)

### Troubleshooting Client is Not found in CaseWorks Search Results

If a case is not appearing in CaseWorks:

1. Ensure the client address(physical) has been entered in SSIS
2. Ensure there is a Case Manager assigned to the Case
3. Ensure that Unit assigned to the case is recognized/implemented in CaseWorks

If CaseWorks is not recognizing the correct client in the APN, the following steps can be taken to assist in identifying the primary participant:

1. Check how the client name has been entered in the Description field
2. Ensure the client has been assigned to the proper unit in SSIS
3. Check the Client's Agency of Service (this should be set to your county)
4. Contact CaseWorks Support

### SSIS Client Information

Person Information	Workgroup Information		
<b>Identification</b>			
Name:	Fred Flintstone DD Case Management 6/19/2007		
Description:	Fred Flintstone	SSIS Workgroup #:	154116134
Type:	Case Management	Agency Workgroup #:	
Program:	Developmental Disabilities	SSIS Case #:	154116133
		Agency Case Extension:	
<b>Status</b>			
Start Date / Time:	6/19/2007 12:00 AM	Status:	Open
Close Reason:			
Close Date / Time:		Destruction Date:	
<b>Security / Workers</b>			
Unit:	Adult Services	Primary Worker:	Robbin [REDACTED]
Access Restriction:	Department	Secondary Workers:	<No data to display>
Agency of Service:	XYZ County		
Agency of Financial Responsibility:	XYZ County		

### CaseWorks All Purpose Navigation

99999999 Fred Flintstone ( 01/01/2000 111-11-1111 Blake Pieper )	Navigate	Case File	✓	📄
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## Troubleshooting Client is Not found in CaseWorks Search Results - For Licensing Units

1. Ensure the client address(physical) has been entered in SSIS
2. Ensure there is a Case Manager assigned to the Case
3. Ensure that Unit assigned to the case is recognized/implemented in CaseWorks
4. If all the above is confirmed, assign the primary participant the Licensing Title "applicant"

