CTS2 User Guide

Access CTS2:

1. navigate to https://apps.pacwilica.org/cts2
2. enter valid userid and password

NOTES:

- Initial page displayed is the 'HOME' page.
- Latest 5 bulletin board items are displayed.
- Main menu is at the top of all pages.

Add new call:

1. Click 'Calls' menu item
2. Click 'Add New Call'
3. Select call type based on call situation
4. Click 'continue'
5. Complete call with specific details.
6. Click 'Update Call'

List open calls:

1. Click 'Calls' menu item
2. Click 'My Calls'
3. Select specific call from listing
4. Make and save any updates.

List closed calls:

1. Click 'Calls' menu item
2. Click 'My Closed'
3. Select specific call from listing

NOTE: only administrators can update a closed call.

Close existing call:

1. Click 'Calls' menu item
2. Click 'Close A Call'
3. Select specific call from listing
4. Select value for time to resolve
5. Select an appropriate resolution
6. Add final comments
7. Click 'Close Call'

Fast close a call:

1. Click 'Calls menu item
2. Click 'My Open'
3. Select specific call from listing
4. Make and save any final updates
5. Click blue 'Fast Close' button
6. Provide appropriate closing information
7. Click 'Close Call'

List All Open Calls:

1. Click 'Calls' menu item
2. Click 'All Open'
3. Select specific call from listing
4. Make and save any updates

(NOTE: calls opened by another can not be closed.

Search all calls:

1. Click 'Calls' menu item
2. Click 'Search Calls'
3. Select 'Open' or 'Closed'
4. Enter target character string to search for
5. Select specific call from results or enter new target string

Send an case email to caller:

1. Open the appropriate call record
2. Make sure call record includes a valid email address
3. Click the blue envelope icon to open send email form
4. Review information about message at top of page
5. Enter subject of email into subject line
6. Select appropriate template or enter the message text.
7. If necessary, edit body text of message
8. Click 'Send'

NOTE: From address:'hotline@pacificwildlifecare.org

Check email in-box:

1. Click 'External' menu item
2. Click 'Hotline Email'
3. Review information at top of page
4. Click 'Email System' button
5. Enter documented user id and password
6. Review and maintain email message in in-box. Copy/paste relevant info back into call record.

NOTES:

- Response to ALL email sent in CTS2 will be listed in this in-box. Make sure to update appropriate call records info with replies if appropriate.
- In-box opens in a new tab.

Check case status in WRMD: 1. Click 'External' menu item 2. Click 'WRMD Case Mgment' 3. Click 'Sign In' of WRMD login page 4. Log in using documented user id and password 5. Click 'Search Patients' in Quick Links 6. Enter search criteria and click 'Search Records' 7. Make sure to note WRMD case number and update the call record with it. NOTE: WRMD opens in a new tab.	**Add/check Bulletin Board:** 1. Click 'BBoard' menu item 2. Click '+' in heading to add a new item 3. Edit/Delete/Print an item using icons 4. Type into Filter to list only items with target string. 5. Select specific item from results list. NOTE: you can only Edit/Delete your own bulletin board item(s).
Access Web Resources: 1. Click 'Resource Links' menu item 2. Click link of selected target NOTE: Linked resources open up in a new tab.	**Access Reference documentation:** 1. Click 'Forms & Docs' menu item 2. Type into Filter to list only items with target string OR 3. Click group button of target topic 4. Access document or form by clicking the name NOTE: Document or form opens in a new tab.
Reports 1. Click 'Reports' menu item 2. Select desired report from menu list NOTE: • All reports will open in a new tab. • All reports are self documented.	