



FuSioN User Guide

Assessment and Coordination – Active Holding

Overview

This User Guide details how to place an assessment and coordination case on active holding, and how to take a case off active holding.

Assessment and Coordination - Active Holding

Step	Action
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1.

HOW TO PLACE A CASE ON ACTIVE HOLDING

From the **Home Page**, navigate to the **Search Cases** screen and search for the case being placed on Active Hold.

- Select the case from the Search Results by clicking on the Case ID hyperlink

Search Case
 Search Results

Case Id	Start Date	Person	Summary	Primary Issue	Status	Reason for Closure	Assigned To	Team	Date Created	Case Type
100014873	13/08/2018	TEST	test	Family Support	Open		WORKER, PERPA1	Perth Partner Agency 1	22/08/2018	A&C
100014890	01/08/2018	TEST	Test	Child Protection	Open		CHELIAH, Anita	CENTRECARE (PERTH/MIDLAND)	24/08/2018	A&C

*Action View Search Results

Search

Case Sensitive

Case ID =

Person ID =

Surname begins with

Forename begins with

Start Date =

2.

Click on the Case Management tab.

Case : (100014890) History Select One...

Save

Case Services Brief Interventions **Case Management** Review Notes (0) Related Activities

Referral Information

*Type Unknown Referral Date 01/08/2018 *Time 8:06AM

Contact Method 06-Telephone

Primary Issue Family Support

*Status Open

Corridor PERTH / MIDLAND

Closure Date

Reason for Case Closure

Hours

Initial Screening	1.00	Service Delivery	3.00
Assessment	1.00	Brief Intervention	0.00
Total hours	5.00		

***Summary**

Test

Assessment

Are there any children identified in this case? Yes No

Number of children

Are there other agencies involved? Yes No

Assessment and Coordination - Active Holding

Step	Action
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3.

Click on the Add Case Manager button.

Network Agency	Stage	Assigned To	Role	Start Date	End Date	Hours
CENTRECARE (PERTH/MIDLAND)	Assessment	WORKER, FICM1	Case Manager	03/08/2018		1.00
CENTRECARE (PERTH/MIDLAND)	Initial Screening	CHELIAH, Anita	Case Manager	01/08/2018	03/08/2018	1.00

4.

Record the following in the Case Manager Allocation section:

- Network Agency
- Stage
- Assigned To
- Role: select **Active Holding**
- Start Date
- Click **APPLY** (Case now displays as on Active Holding)

Case Manager Allocation

Network Agency: [Dropdown] Stage: [Dropdown]

Assigned To: [Dropdown] Start Date: 24/08/2018

Apply Cancel

Network Agency	Stage	Assigned To	Role	Start Date	End Date	Hours
CPFS-Perth/Midland (A&C)	Assessment	POH, Dixee	Active Holding	06/08/2018		
CENTRECARE (PERTH/MIDLAND)	Assessment	WORKER, FICM1	Case Manager	03/08/2018	06/08/2018	1.00
CENTRECARE (PERTH/MIDLAND)	Initial Screening	CHELIAH, Anita	Case Manager	01/08/2018	03/08/2018	1.00

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The case will now be displayed on the Home page in the Cases with Active Holding pagelet.

- Click on the Case ID hyperlink to navigate into the active holding case.

5.

Case ID	Start Date	Name	Primary Issue	Days	Team	Assigned To	Status	Referrer Type	Referrer Name
100014890	01/08/2018	TEST, Person1	Family Support	18	CPFS-Perth/Midland (A&C)	POH, Dixee	OPEN	Unknown	-

HOW TO TAKE A CASE OFF ACTIVE HOLDING

Navigate to the case to be taken off Active Holding and click on its Case Management tab.

Click on the Add Case Manager button.

6.

Network Agency	Stage	Assigned To	Role	Start Date	End Date	Hours
CPFS-Perth/Midland (A&C)	Assessment	POH, Dixee	Active Holding	06/08/2018		
CENTRECARE (PERTH/MIDLAND)	Assessment	WORKER, FICM1	Case Manager	03/08/2018	06/08/2018	1.00
CENTRECARE (PERTH/MIDLAND)	Initial Screening	CHELIAH, Anita	Case Manager	01/08/2018	03/08/2018	1.00

Add Case Manager | Update Case Manager

*Network Agency	*Stage	*Assigned To	Role	*Start Date	End Date
			Co-Worker	24/08/2018	

Assessment and Coordination - Active Holding

Step	Action
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Record the following in the Case Manager Allocation section:

- Network Agency
- Stage
- Assigned To
- Role: select **Case Manager**
- Start Date
- Click **APPLY** (Case no longer displays as on Active Holding)

7.

Case : (100014890) History Select One...

Save

Case Services Brief Interventions **Case Management** Review Notes (0) Related Activities D

Find First 1-4 of 4 Last

Network Agency	Stage	Assigned To	Role	Start Date	End Date	Hours
CPFS-Perth/Midland (A&C)	Assessment	POH, Dixee	Active Holding	06/08/2018		
CENTRECARE (PERTH/MIDLAND)	Assessment	WORKER, FICM1	Case Manager	03/08/2018	06/08/2018	1.00
CENTRECARE (PERTH/MIDLAND)	Initial Screening	CHELIAH, Anita	Case Manager	01/08/2018	03/08/2018	1.00

Add Case Manager Update Case Manager

Case Manager Allocation

Network Agency Stage

Assigned To *Role Start Date 24/08/2018

Apply Cancel

On the Case Management tab, the Active Holding entry now displays as end dated.

8.

Case : (100014890) History Select One...

Save

Case Services Brief Interventions **Case Management** Review Notes (0) Related Activities D

Find First 1-4 of 4 Last

Network Agency	Stage	Assigned To	Role	Start Date	End Date	Hours
CENTRECARE (PERTH/MIDLAND)	Assessment	WORKER, FICM1	Case Manager	24/08/2018		
CPFS-Perth/Midland (A&C)	Assessment	POH, Dixee	Active Holding	06/08/2018	24/08/2018	
CENTRECARE (PERTH/MIDLAND)	Assessment	WORKER, FICM1	Case Manager	03/08/2018	06/08/2018	1.00
CENTRECARE (PERTH/MIDLAND)	Initial Screening	CHELIAH, Anita	Case Manager	01/08/2018	03/08/2018	1.00

Add Case Manager Update Case Manager

Co-Worker Details

Find First 1 of 1 Last

*Network Agency	*Stage	*Assigned To	Role	*Start Date	End Date
<input type="text"/>	<input type="text"/>	<input type="text"/>	Co-Worker	24/08/2018	<input type="text"/>

Audit History

Save Top of Page