


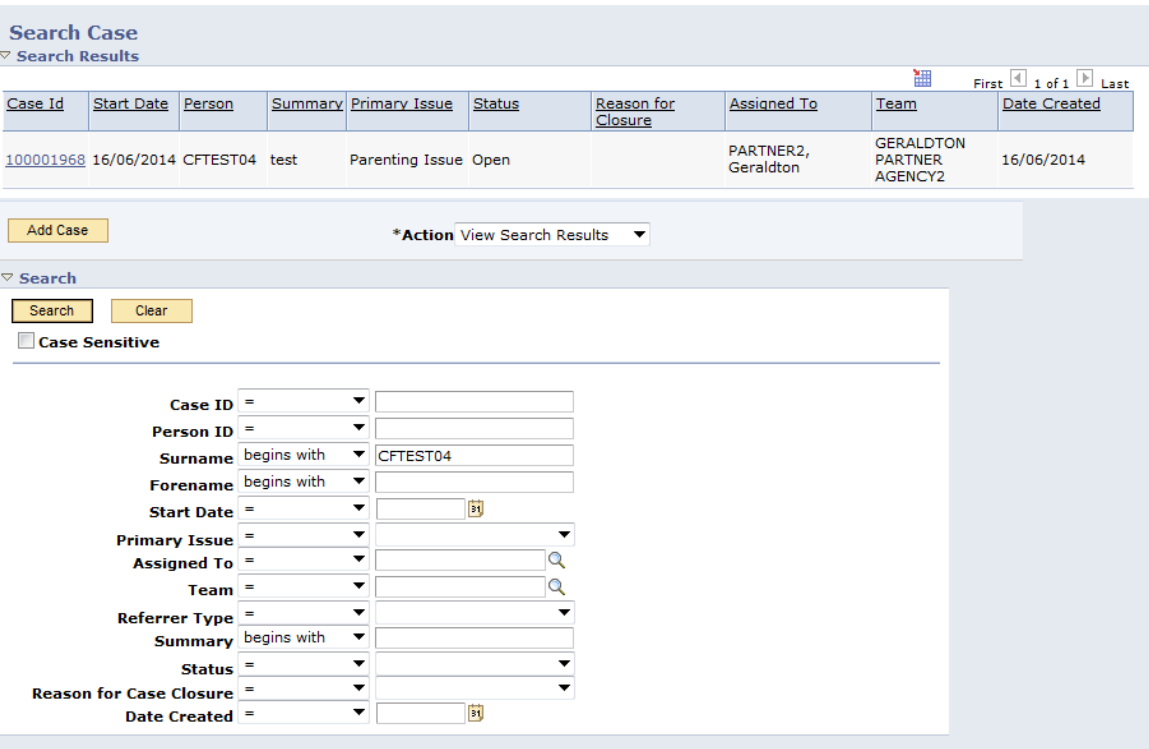


FuSioN User Guide

Assessment and Coordination - Create and Relate a Case

Overview	This User Guide details how to create and relate a case from an Assessment and Coordination case.
Hints & Tips	<p>Search for the appropriate Person IDs to ensure correct recording of information.</p> <p>The Create and Relate a Case function allows you to:</p> <ul style="list-style-type: none">• Create and Relate a New Case to a previous or existing FuSioN case• If appropriate, copy some pre-existing information from the completed case to the new case <p>The Create and Relate a Case function is only available in Assessment and Coordination cases; it is not available on Intensive Case Management cases.</p>

Create and Relate a Case

Step	Action																				
1.	<p>To search for an existing FuSioN case, navigate to Search Case, in the Main Menu on the homepage.</p>  <p>The screenshot shows the 'Main Menu' with several options. A red box highlights the 'Search Cases' option, which is part of a list including 'FuSioN Home', 'Person Search', 'Query Viewer', and 'My Reports'. Other menu items include 'Customers CRM', 'Reporting Tools', and 'Change My Password'.</p>																				
2.	<p>Complete a search for a case already recorded in FuSioN, and select the Case ID.</p>  <p>The screenshot displays the 'Search Case' interface. At the top, there is a 'Search Results' section with a table of results. Below this is an 'Add Case' button and an '*Action' dropdown menu set to 'View Search Results'. The 'Search' section includes a search bar with 'Search' and 'Clear' buttons, a 'Case Sensitive' checkbox, and a list of search filters with dropdown menus and input fields.</p> <table border="1" data-bbox="268 1115 1406 1211"> <thead> <tr> <th>Case Id</th> <th>Start Date</th> <th>Person</th> <th>Summary</th> <th>Primary Issue</th> <th>Status</th> <th>Reason for Closure</th> <th>Assigned To</th> <th>Team</th> <th>Date Created</th> </tr> </thead> <tbody> <tr> <td>100001968</td> <td>16/06/2014</td> <td>CFTEST04</td> <td>test</td> <td>Parenting Issue</td> <td>Open</td> <td></td> <td>PARTNER2, Geraldton</td> <td>GERALDTON PARTNER AGENCY2</td> <td>16/06/2014</td> </tr> </tbody> </table>	Case Id	Start Date	Person	Summary	Primary Issue	Status	Reason for Closure	Assigned To	Team	Date Created	100001968	16/06/2014	CFTEST04	test	Parenting Issue	Open		PARTNER2, Geraldton	GERALDTON PARTNER AGENCY2	16/06/2014
Case Id	Start Date	Person	Summary	Primary Issue	Status	Reason for Closure	Assigned To	Team	Date Created												
100001968	16/06/2014	CFTEST04	test	Parenting Issue	Open		PARTNER2, Geraldton	GERALDTON PARTNER AGENCY2	16/06/2014												

Create and Relate a Case

Step	Action
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3.

Navigate to **Related Activities** 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	0.00	Service Delivery	3.00
Assessment	0.00	Brief Intervention	0.00
Total hours	3.00		

***Summary**
 Test
Assessment

Are there any children identified in this case? Yes No
 Number of children
 Are there other agencies involved? Yes No

4.

Select the **Create and Relate** button.

Case : (100001968) History Select One...

Save

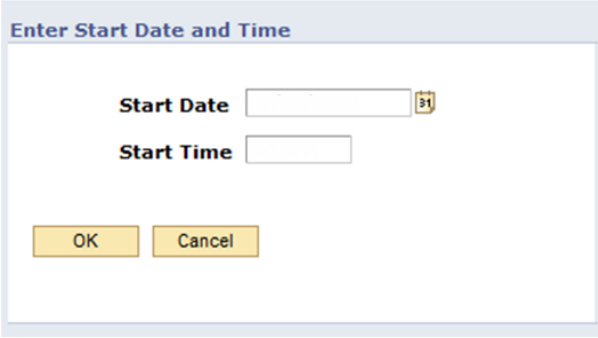
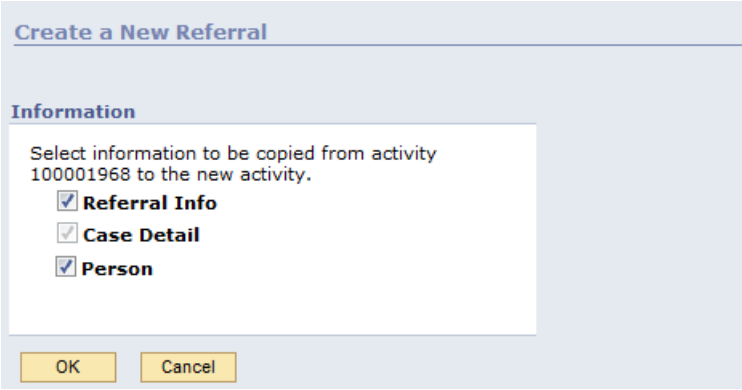
Case Management Review Outcome Notes (1) **Related Activities** Audit History

Related Activities

Activity Type	Activity ID	Activity Date	Summary	Status	Assigned To	Date Added	
Case	100001971	16/06/2014	test	Open	FENECH,Camille	16/06/2014 10:47AM AWST	Delete
FSN Activity	100001969	16/06/2014	FSN Activity	Open	PARTNER2, Geraldton	16/06/2014 10:28AM AWST	Delete

Relate an Existing Case **Create and Relate a New Case**

Create and Relate a Case

Step	Action
5.	<p>Record the Start Date.</p> <p>Start Time auto-populates to current time, however this can be updated manually.</p>  <p>The screenshot shows a dialog box titled "Enter Start Date and Time". It contains two input fields: "Start Date" with a calendar icon to its right, and "Start Time". Below the fields are two buttons: "OK" and "Cancel".</p> <p>Select the OK button.</p>
6.	<p>Select the information to be copied over to the New Case:</p> <ul style="list-style-type: none">• Un-tick the Referral Info if the referrer is different for this case• Leave Person ticked if the same persons are required to be attached to the new case.  <p>The screenshot shows a dialog box titled "Create a New Referral". It has a section titled "Information" with the text "Select information to be copied from activity 100001968 to the new activity." Below this text are three checked checkboxes: "Referral Info", "Case Detail", and "Person". At the bottom are "OK" and "Cancel" buttons.</p> <p>Select OK.</p>

Create and Relate a Case

Step	Action
7.	<p>The newly created case will now appear in the Related Activities tab.</p> <p>Then select the Activity ID hyperlink to transfer to the case.</p>