

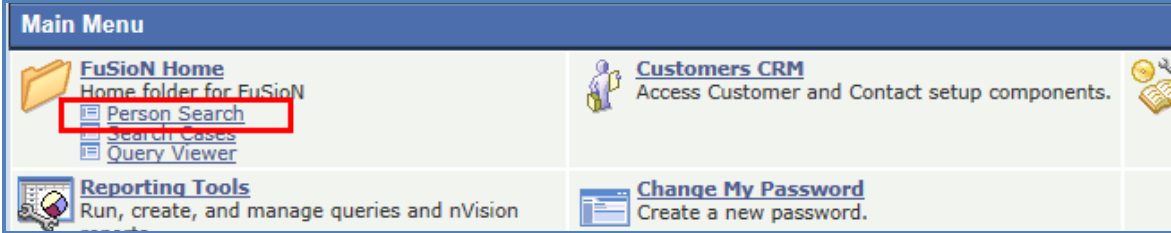

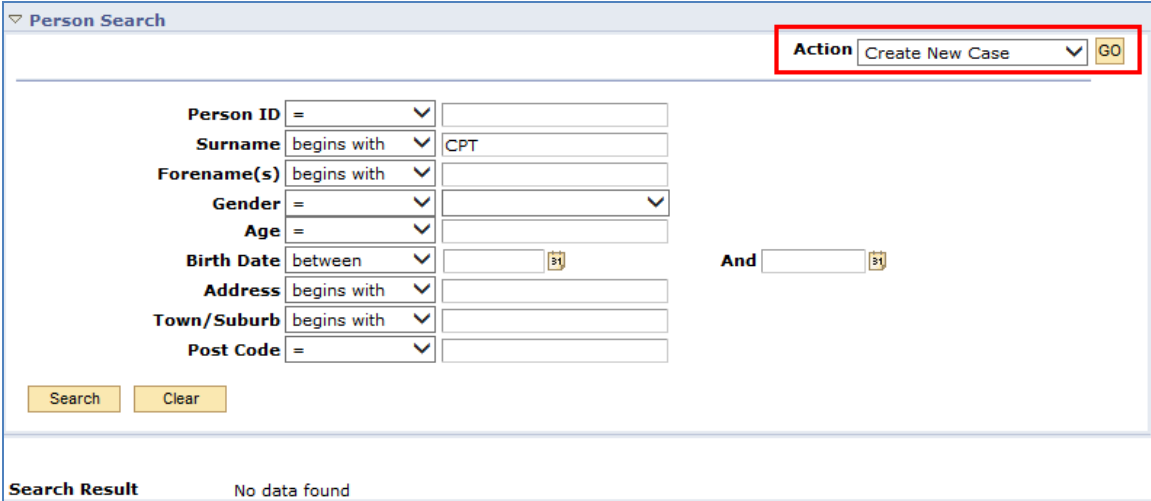


FuSioN User Guide

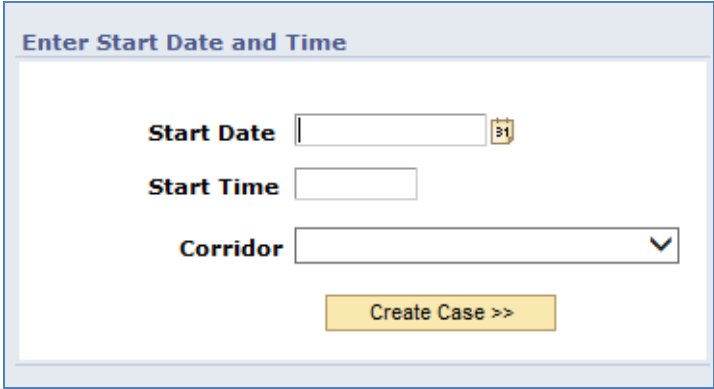
How to Create an Assessment and Coordination Case

Overview	This User Guide details how to create an Assessment and Coordination case within FuSioN.
Hints & Tips	A Case has successfully been saved when a Case Id displays at the top of the screen.

How to Create an Assessment and Coordination Case

Step	Action
1.	<p>Navigate to the Person Search within the Main Menu on the home screen to search for the client.</p>  <p>The screenshot shows a 'Main Menu' with several options. A red box highlights the 'Person Search' option, which is part of a folder labeled 'FuSioN Home'. Other options include 'Reporting Tools', 'Customers CRM', and 'Change My Password'.</p>
2.	<p>Search for the client and navigate to the client's Person View from the Search Results. In the Action drop down list, select Create New Case and click Go</p>  <p>The screenshot shows the 'Person View' for a client with ID 455455. The 'Actions' dropdown menu is open, showing 'Add Case' selected. A red box highlights the 'Actions' dropdown and the 'Go' button.</p> <p>OR</p> <p>If incorrect or no results are displayed in the Person Search, select Create New Case in the Action drop down list and click Go.</p>  <p>The screenshot shows the 'Person Search' form. The 'Action' dropdown menu is set to 'Create New Case', and the 'GO' button is highlighted with a red box. The search criteria are: Person ID =, Surname begins with CPT, Forename(s) begins with, Gender =, Age =, Birth Date between, Address begins with, Town/Suburb begins with, and Post Code =.</p> <p>Search Result No data found</p>



How to Create an Assessment and Coordination Case

Step	Action
3.	<p>Record the appropriate Start Date.</p> <p>Start Time auto-populates to current time, however this can be updated manually.</p> <p>Select the relevant Corridor in which the user creating the case is working in.</p> <div data-bbox="301 674 1018 1061"></div> <p>Click Create Case.</p>

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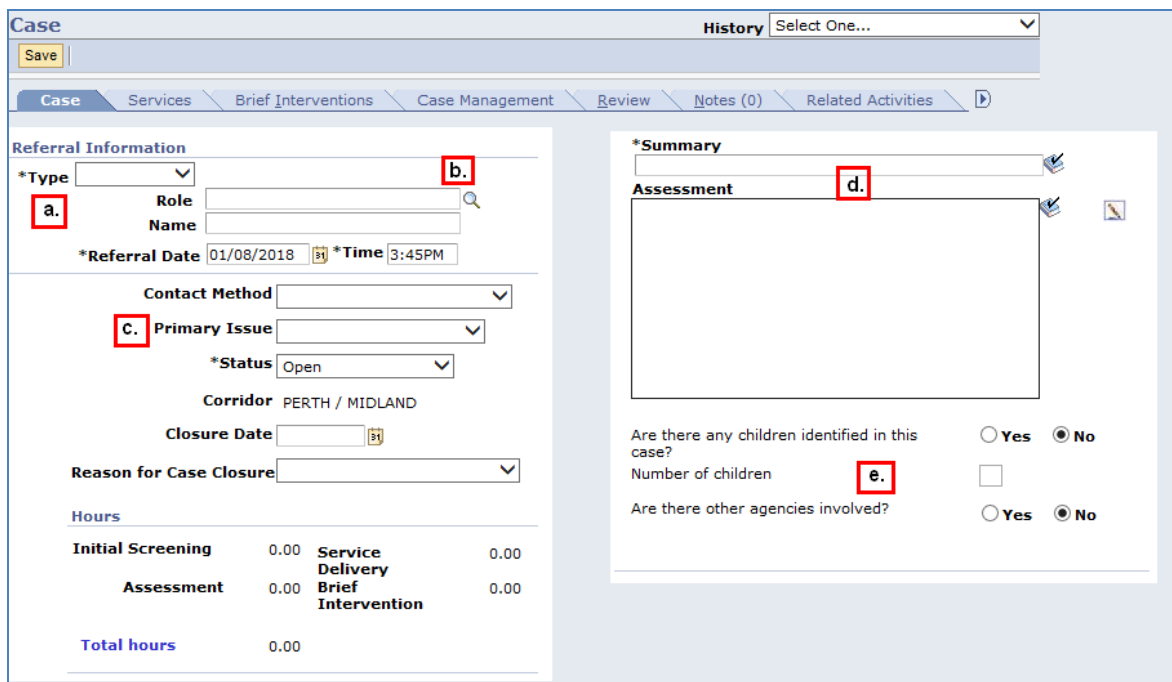
Step	Action
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Complete the following:

- Select **Referral** type; if Agency is the referrer, you will need to select the specific Agency using the search icon .
- Select the referral **Role**, . If Agency has been selected, the **Name** of the referrer will need to be recorded.
- Using the drop down list select a **Contact Method** and a **Primary Issue**.
- Summary** and **Assessment** are free text fields. Complete as required.
- Complete all fields.

Please Note: If a person is required to be selected as the referrer, and they do not appear in the search, they will need to be created in the system.

4.



The screenshot displays the 'Case' management interface. The 'Referral Information' section includes the following fields:

- *Type**: Dropdown menu (highlighted with 'a.').
- Role**: Dropdown menu (highlighted with 'b.').
- Name**: Text input field with a search icon.
- *Referral Date**: Date picker (01/08/2018).
- *Time**: Time picker (3:45PM).
- Contact Method**: Dropdown menu.
- Primary Issue**: Dropdown menu (highlighted with 'c.').
- *Status**: Dropdown menu (Open).
- Corridor**: Text field (PERTH / MIDLAND).
- Closure Date**: Date picker.
- Reason for Case Closure**: Dropdown menu.


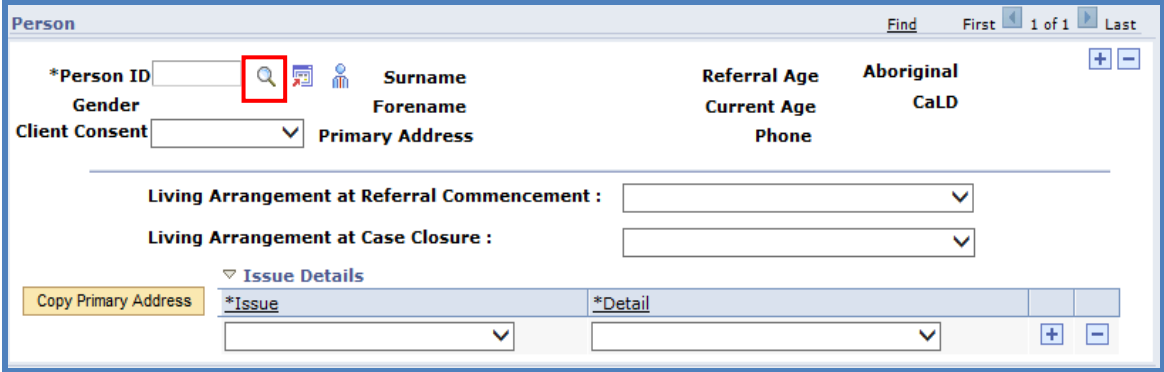
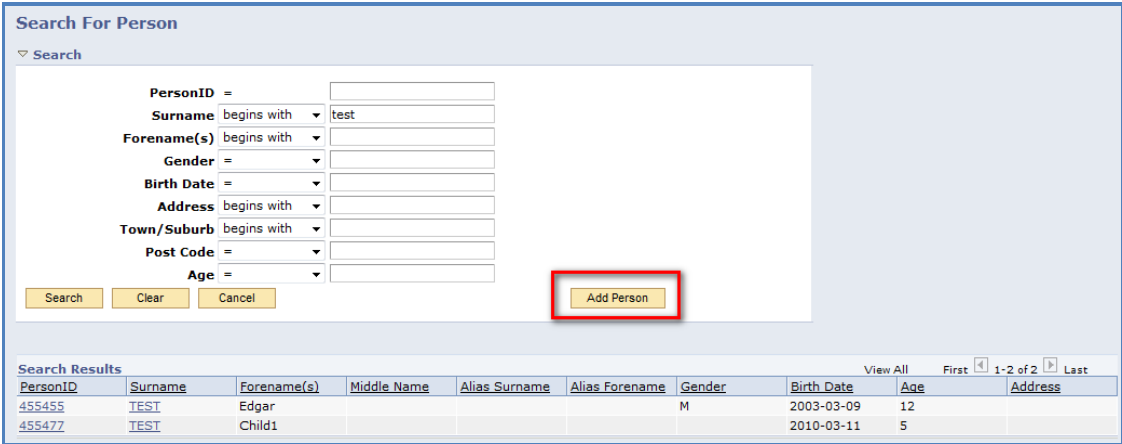
The 'Summary' section includes:

- *Summary**: Text input field (highlighted with 'd.').
- Assessment**: Large text area (highlighted with 'd.').
- Are there any children identified in this case?**: Radio buttons for Yes and No (No is selected).
- Number of children**: Text input field (highlighted with 'e.').
- Are there other agencies involved?**: Radio buttons for Yes and No (No is selected).



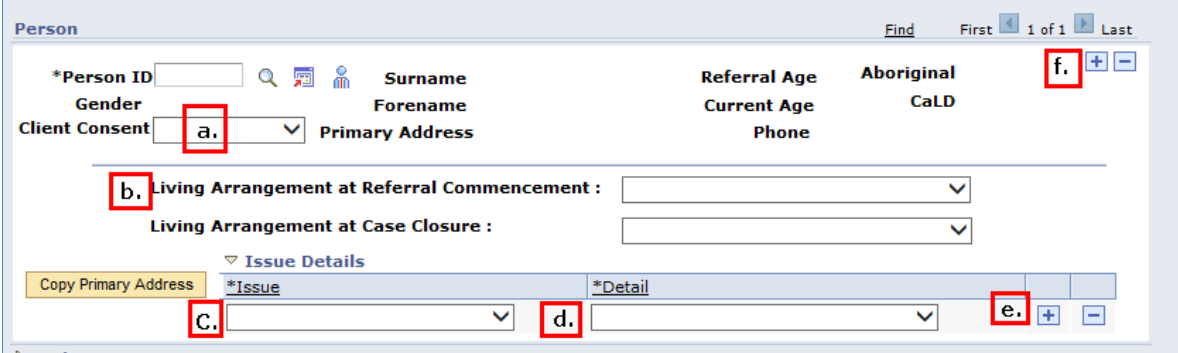
At the bottom, there is an 'Hours' table:

Hours			
Initial Screening	0.00	Service Delivery	0.00
Assessment	0.00	Brief Intervention	0.00
Total hours	0.00		

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Step	Action																														
5.	<p>Scroll down to record the Persons' attached to the case.</p> <p>Select the search icon  to search for the Person.</p> 																														
6.	<p>If the name returned in your search is correct select the hyperlink to continue.</p> <p>If your search does not return the correct person select the Add Person button and refer to the relevant user guide to record a Person's details.</p>  <table border="1" data-bbox="288 1630 1415 1709"> <thead> <tr> <th>PersonID</th> <th>Surname</th> <th>Forename(s)</th> <th>Middle Name</th> <th>Alias Surname</th> <th>Alias Forename</th> <th>Gender</th> <th>Birth Date</th> <th>Age</th> <th>Address</th> </tr> </thead> <tbody> <tr> <td>455455</td> <td>TEST</td> <td>Edgar</td> <td></td> <td></td> <td></td> <td>M</td> <td>2003-03-09</td> <td>12</td> <td></td> </tr> <tr> <td>455477</td> <td>TEST</td> <td>Child1</td> <td></td> <td></td> <td></td> <td></td> <td>2010-03-11</td> <td>5</td> <td></td> </tr> </tbody> </table>	PersonID	Surname	Forename(s)	Middle Name	Alias Surname	Alias Forename	Gender	Birth Date	Age	Address	455455	TEST	Edgar				M	2003-03-09	12		455477	TEST	Child1					2010-03-11	5	
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Step	Action
8.	<p>Complete the Person details:</p> <ul style="list-style-type: none"> a. Client Consent. b. Living Arrangement at Referral Comencement c. Issue d. Detail. e. To add or remove Issues, use  f. To add or remove Persons, use  
9.	Click Save to save the Assessment and Coordination case.