



# 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.

## 1. SEARCH FOR THE CASE:

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
<a href="#">100021395</a>	28/07/2020	TESTERSUR	testtesttest		Open		THOMPSON, Jason	CENTRECARE (ARMADALE/CANNINGTON)	28/07/2020	A&C
<a href="#">100021381</a>	27/07/2020	HARVEY	Test 20		Open		FINNEGAN, Karen	BLACK SWAN HEALTH (Mirrabooka)	27/07/2020	A&C

## 2. WITHIN THE CASE:

Click on the **Case Management** tab.

Click on the **Add Case Manager** button

**Case : (100021381)** History

Network Agency	Stage	Assigned To	Role	Start Date
BLACK SWAN HEALTH (Mirrabooka)	Initial Screening	FINNEGAN, Karen	Case Manager	27/07/2020



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### 3. ADD IN THE DETAILS:

Record the following in the Case Manager Allocation section:

- Network Agency
- Stage
- Assigned To
- Role: select **Active Holding**
- Start Date

**Case Manager Allocation**

Network Agency	<input type="text"/>	Stage	<input type="text"/>
Assigned To	<input type="text"/>		
*Role	<input type="text"/>	Start Date	19/08/2020

Click **APPLY** (Case now displays as on Active Holding)

Case	Services	Brief Interventions	<b>Case Management</b>	Review	Outcomes	Notes (4)	Related Activities	Audit History
<b>Responsibility</b>	Audit	▶						
<b>Network Agency</b>	<b>Stage</b>	<b>Assigned To</b>		<b>Role</b>	<b>Start Date</b>	<b>End Date</b>	<b>Hours</b>	
BLACK SWAN HEALTH (Mirrabooka)	Initial Screening	CARTER, Claire		Active Holding	14/08/2020			
BLACK SWAN HEALTH (Mirrabooka)	Initial Screening	FINNEGAN, Karen		Case Manager	27/07/2020	14/08/2020	1.00	
<input type="button" value="Add Case Manager"/>		<input type="button" value="Update Case Manager"/>						



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## 4. CASE WILL DISPLAY IN THE CASES ON ACTIVE HOLDING:

The case will now be displayed in **My Case & Service List** under the **Cases with Active Holding**.

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

The screenshot shows the 'My Case & Service List' interface. On the left is a navigation menu with options: 'My FuSioN A&C Cases', 'My FuSioN ICM Cases', 'My FuSioN Services', and 'Cases with Active Holding' (which is highlighted). The main area shows a dropdown for '\*Team ID' set to 'BLACK SWAN HEALTH (Mirrabooka)'. Below this is a search bar and a table with columns: Case ID, Start Date, Name, Primary Issue, and Days. The table contains one entry with Case ID 100021381, Start Date 27/07/2020, and Name HARVEY, Test. There are also tabs for 'My Held Cases' and 'Additional Data'.

Case ID	Start Date	Name	Primary Issue	Days
<a href="#">100021381</a>	27/07/2020	HARVEY, Test		



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## 5. HOW TO TAKE A CASE OFF ACTIVE HOLDING:

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

Click on the **Add Case Manager** button.

b. Record the following in the Case Manager Allocation section:

- Network Agency
- Stage
- Assigned To
- Role: select **Case Manager**
- Start Date

The 'Case Manager Allocation' form contains the following fields: 'Network Agency' (dropdown), 'Stage' (dropdown), 'Assigned To' (text input with search icon), '\*Role' (dropdown), and 'Start Date' (calendar icon). Below the form are 'Apply' and 'Cancel' buttons.

Click **APPLY** (Case no longer displays as on Active Holding)

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

The screenshot shows the 'Case Management' tab selected in a navigation bar. Below it is a table with columns: Network Agency, Stage, Assigned To, Role, Start Date, End Date, and Hours. The 'End Date' for the 'Active Holding' entry is highlighted with a red box.

Network Agency	Stage	Assigned To	Role	Start Date	End Date	Hours
BLACK SWAN HEALTH (Mirrabooka)	Initial Screening	BLACK, Chris	Case Manager	14/08/2020		
BLACK SWAN HEALTH (Mirrabooka)	Initial Screening	CARTER, Claire	Active Holding	14/08/2020	14/08/2020	
BLACK SWAN HEALTH (Mirrabooka)	Initial Screening	FINNEGAN, Karen	Case Manager	27/07/2020	14/08/2020	1.00