



# Assessment and Coordination – Closing a Case

## OVERVIEW

This User Guide details how to close an Assessment and Coordination case.

## HINTS & TIPS

Ensure all case information and requirements have been completed and that closure is supported/approved within your agency.

Prior to completing closure of a case:

- all Services will need to be closed;
- Living Arrangement at Case closure in Person detail section (Case tab) must have been entered;
- All the questions on the Outcomes tab must have been completed.

## 1. COMPLETING ANY SERVICES:

In the Assessment and Coordination Case, navigate to the **Services** tab to ensure that all services have been closed.

Refer to the **Close a Service Provision** user guide for further information on how to close a service.

Case : (100021253)

Save

Case **Services** Brief Interventions Case Management Review Outcomes Notes (9) Related Activities Audit History

Service Provision

Service Type	Status	External	Start Date	End Date	
Other	Unmet Demand	<input checked="" type="checkbox"/>	02/08/2020	14/08/2020	Delete
Housing Support	Allocated	<input type="checkbox"/>	01/08/2020	15/08/2020	Delete

Add Service



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## 2. REVIEW DETAILS:

A review is required before closing the Case if there is a Service on the Case.

Navigate to the **Review** tab and if required enter in the review details.

Refer to the **A&C – Review** user guide for further information on how to complete a review.

Case : (100021253)

Save

Case Services Brief Interventions Case Management **Review** Outcomes Notes (9) Related Activities Audit History

Main Audit II>

Review Type	Review Date	Review Outcome	Details		
Scheduled Review of Progress <input type="checkbox"/>	15/08/2020 <input type="text"/>	Other <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

## 3. ENTER IN THE OUTCOMES:

Navigate to **Outcomes** tab.

Ensure the following items have been completed:

- Case Plan Goals** (all columns as per age of the case)

Case : (100021253)

Save

Case Services Brief Interventions Case Management Review **Outcomes** Notes (9) Related Activities Audit History

Case Plan Goals II>

Case Plan Goal	Up to 1 month	Up to 4 months	Up to 8 months	Up to 12 months	more than 12 months
1 Total number of Case Plan goals	<input type="text"/>				
2 How many case plan goals are progressing?	<input type="text"/>				
3 How many case plan goals have been completed?	<input type="text"/>				



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## b. Case Manager questions

Case Manager Questions Client Exit Interview

Entry Questions Audit Details ||▶

Questions	Response
1 What is the family's ability to provide a parenting role to children in the family group?	<input type="text"/>
2 What is the family's ability to establish and maintain a safe and stable family environment and household routines?	<input type="text"/>
3 What is the family's ability to access community support services?	<input type="text"/>

Exit Questions Audit Details ||▶

Questions	Response
1 What is the family's ability to provide a parenting role to children in the family group?	<input type="text"/>
2 What is the family's ability to establish and maintain a safe and stable family environment and household routines?	<input type="text"/>
3 What is the family's ability to access community support services?	<input type="text"/>
4 What is the family's view on whether they received a service from the Lead agency that aligned with their cultural views and expectations?	<input type="text"/>
5 What is the family's view on whether they received a service from the Partner agency that aligned with their cultural views and expectations?	<input type="text"/>

## c. Client Exit Interview questions

Case Manager Questions Client Exit Interview

Exit Questions Audit Details ||▶

Questions	Response
1 Were you involved in planning your case?	<input type="text"/>
2 As a family, what is your confidence in setting up and keeping routines to support as stable family environment?	<input type="text"/>
3 Were these questions answered by the client?	<input type="text"/>
4 How many times did you have to explain your story?	<input type="text"/>
5 Do you think the worker identified all of your needs at the beginning?	<input type="text"/>
6 Were you given a case manager?	<input type="text"/>
7 Do you think your case manager co-ordinated support for all of your needs?	<input type="text"/>
8 Do you think you increased your network of friends, family or community that you are comfortable calling on in times of need?	<input type="text"/>
9 Do you feel safe and secure in your identity and culture?	<input type="text"/>



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## 4. COMPLETING THE CASE DETAILS REGARDING THE CLIENTS:

Navigate to the **Case** tab.

Record the **Living Arrangement at Case Closure** for each person included in the case.

*Person ID	480562	Surname	TEST	Referral Age	46	Aboriginal	Not Recorded
Gender	Female	Forename	Melly	Current Age	46	CaLD	Not Recorded
Client Consent	No	Primary Address	189 Royal Street, East Perth, WA, 6004, AUS	Phone	610411 222 536	Alert Exists	

Living Arrangement at Referral Commencement : Child in shared care

Living Arrangement at Case Closure :

Issue Details	
Issue	Detail
Financial Assistance	Expenditure
Family Domestic Violence	Financial

## 5. UPDATING THE CASE DETAILS TO COMPLETE:

On the **Case** tab, complete the following details:

- A. Change the **Status** to Completed.
- B. Record a **Closure Date**.
- C. Select a **Reason For Closure**.

Click **Save**.

Case : (100021253)

Save

Case Services Brief Interventions Case Management Review Outcomes Notes (9) Related Activities Audit History

**Referral Information**

\*Type Unknown

\*Referral Date 17/07/2020 \*Time 4:47PM

Contact Method 01-Email

Primary Issue Child Protection

\*Status Open

Corridor MIRRABOOKA / JOONDALUP

Closure Date

Reason for Case Closure

\*Summary test

Assessment

Are there any children identified in this case? Yes No

Number of children

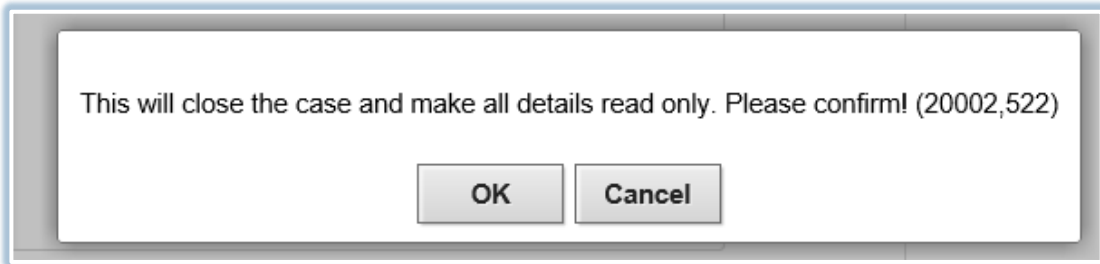
Are there other agencies involved? Yes No



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## 6. CONFIRMING CASE CLOSURE:

The following message will appear:



If further changes are required, select **Cancel**.  
To complete the closure, select **OK**.

## 7. CASE COMPLETED:

The case will now be closed and read-only.

<b>Case</b>	Services	Brief Interventions	Case Management	Review	Outcomes	Notes (9)	Related Activities	Audit History
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**Referral Information**

*Type	Unknown		
Referral Date	17/07/2020	*Time	4:47PM
Contact Method	01-Email		
Primary Issue	Child Protection		
*Status	Completed		
Corridor	MIRRABOOKA / JOONDALUP		
Closure Date	15/08/2020		
Reason for Case Closure	Case Completed		

**Hours**

Initial Screening	1.00	Service Delivery	3.00
Assessment	0.00	Brief Intervention	2.00
<b>Total hours</b>	<b>6.00</b>		

**Summary**

test  
Assessment  
testing

Are there any children identified in this case?  Yes  No

Number of children

Are there other agencies involved?  Yes  No