



Assessment and Coordination – Case Management Allocation

OVERVIEW

This User Guide details how to record a case management allocation in an Assessment and Coordination case.

Case management allocation is required to allocate a case between agencies or team members.

HINTS & TIPS

As part of an Allocation meeting, the case may be required to be allocated to a relevant agency.

1. ALLOCATING A CASE:

Navigate to the Assessment and Coordination Case.

Click on the **Case Management** tab.

Case : (100021476)

Save

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

Responsibility Audit ||

Network Agency	Stage	Assigned To	Role	Start Date	End Date	Hours
LIFELINE WA (ARMADALE)	Initial Screening	WEIR, Naomi	Case Manager	05/08/2020		<input type="text"/>



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2. ENTER IN THE HOURS:

On the **Case Management** tab, enter **hours** against the current allocation if it has an Hours field before adding the new allocation to the case.

Case : (100021476) History Select One... ▼

Save

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

Responsibility Audit ||▶

Network Agency	Stage	Assigned To	Role	Start Date	End Date	Hours
LIFELINE WA (ARMADALE)	Initial Screening	WEIR, Naomi	Case Manager	05/08/2020		<input type="text"/>

Note:

- The Hours field is only displayed against the Initial Screening and Assessment allocations; it is not displayed against Case Management and Case Closure allocations.
- The hours recorded against applicable allocations stages remain editable until the case is closed.
- On the **Case** tab, a summary of the hours recorded is displayed for the relevant stage (if entered).

Hours

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



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3. ADDING NEW CASE MANAGEMENT:

On the **Case Management** tab, select the **Add Case Manager** button.

The screenshot displays the 'Case Management' tab in a software interface. At the top, there are several tabs: 'Case', 'Services', 'Brief Interventions', 'Case Management' (which is active and highlighted in green), 'Review', 'Outcomes', 'Notes (0)', 'Related Activities', and 'Audit History'. Below these tabs, there are two sub-sections. The first sub-section is titled 'Responsibility' and contains a table with the following data:

Network Agency	Stage	Assigned To	Role	Start Date	End Date	Hours
LIFELINE WA (ARMADALE)	Initial Screening	WEIR, Naomi	Case Manager	05/08/2020		1.50

Below the table, there are two buttons: 'Add Case Manager' (highlighted with a red box) and 'Update Case Manager'. The second sub-section is titled 'Co-Worker Details' and contains a table with the following data:



Network Agency	Stage	Assigned To	Role	Start Date	End Date		
<input type="text"/>	<input type="text"/>	<input type="text"/>	Co-Worker	15/08/2020	<input type="text"/>	<input type="text"/>	<input type="text"/>



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4. ENTERING IN CASE MANAGEMENT DETAILS:

Complete the following details:

- **Network Agency:** select the relevant Agency from the list.
- **Stage:** select the appropriate Stage (for example: Assessment).
- **Assigned To:** select the appropriate person through the look up function 
- **Role:** select an appropriate Role (for example: Case Manager).
- **Start Date:** auto-populates to Current Date. To change the date, use the calendar icon 

Case Manager Allocation

Network Agency	<input type="text"/>	Stage	<input type="text"/>
Assigned To	<input type="text"/>	Start Date	<input type="text" value="15/08/2020"/>
*Role	<input type="text"/>		

Select **Apply**.

The previous allocation will now be end-dated. The newly added allocation is now the case's current allocation.

Case Management Allocation							
Network Agency	Stage	Assigned To	Role	Start Date	End Date	Hours	
COMMUNICARE (ARMADALE)	Assessment	WOLF, Tashi	Case Manager	15/08/2020			<input type="text"/>
LIFELINE WA (ARMADALE)	Initial Screening	WEIR, Naomi	Case Manager	05/08/2020	15/08/2020	1.50	<input type="text" value="1.50"/>