



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

Search for the appropriate Person IDs to ensure correct recording of information.

The Create and Relate a Case function allows you to:

- 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

The Create and Relate a Case function is only available in Assessment and Coordination cases; it is not available on Intensive Case Management cases.

1. SEARCH FOR EXISTING CASE:

To search for an existing FuSioN case, navigate to **Search Cases**, in the Main Menu on the homepage.

Complete a search for a case already recorded in FuSioN, and select the **Case ID**.

Case : (100021399)

Save

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

Referral Information

*Type Unknown

*Referral Date 28/07/2020 *Time 11:06AM

Contact Method 01-Email

Primary Issue Child Development

*Status Open

Corridor FREMANTLE / ROCKINGHAM

Closure Date

Reason for Case Closure

***Summary**
testing create and relate cases

Assessment
test

Are there any children identified in this case? Yes No

Number of children

Are there other agencies involved? Yes No



Assessment and Coordination – Create and Relate a Case

2. CREATING RELATED ACTIVITY:

Click on the **Related Activities** tab.

Select the **Create and Relate a New Case** button.

Case : (100021399)

Save

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

Related Activities

Q 1-1 of 1 View All

Activity Type	Activity ID	Activity Date	Summary	Status	Assigned To	Date Added	Case Type	
FSN Activity	100021511	16/08/2020	FSN Activity	Open	GRACE, Tim	16/08/2020 9:17AM AWST		Delete

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

3. CREATING THE CASE DETAILS:

Record the **Start Date**.

Start Time auto-populates to current time, however this can be updated manually.

Enter the **Corridor**.

Select the **OK** button.

Enter Start Date and Time

Start Date

Start Time

Corridor

OK Cancel

4. SELECTING INFORMATION TO COPY TO NEW CASE:

Select the information to be copied over to the New Case:

- **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.

Select **OK**.

Create a New Referral

Information

Select information to be copied from activity 100021399 to the new activity.

Referral Info

Case Detail

Person

OK Cancel



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4. NEW RELATED CASE CREATED:

The newly created case will now appear in the **Related Activities** tab.

Select the **Activity ID** hyperlink to transfer to the case.

Case : (100021399)

Save

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

Related Activities

Q 1-2 of 2

Activity Type	Activity ID	Activity Date	Summary	Status	Assigned To	Date Added	Case Type
FSN Activity	100021511	16/08/2020	FSN Activity	Open	GRACE, Tim	16/08/2020 9:17AM AWST	
Case	100021513	16/08/2020	testing create and relate cases	Open	Reda, Wintana	16/08/2020 9:31AM AWST	A&C