Creating 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.

NAVIGATION

A Case can be created from the **Search Cases** screen, from the **Person Search** screen or within the **Person View** screen.

1. CREATING A CASE:

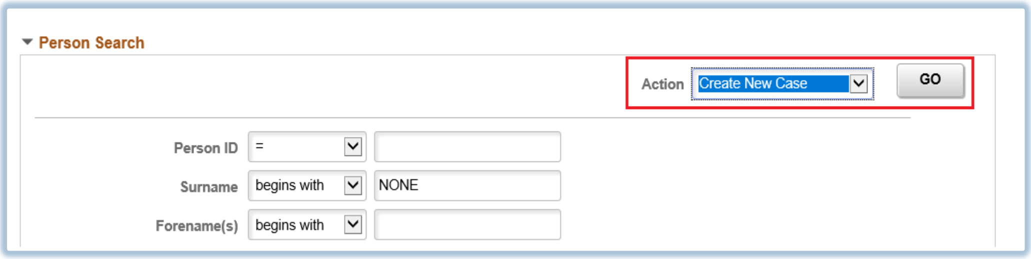
- To create a case directly from **Search Cases**, navigate to the **Search Cases** from home page and click on the **Add Case** button. Move to next step for further instructions.
- The following will explain creating a case directly from the **Person View** and from the **Person Search** (when the client doesn't exist).

a. Adding a Case when the Client doesn't exist

On the Home page, click on **Person Search** tile.

Search for the client.

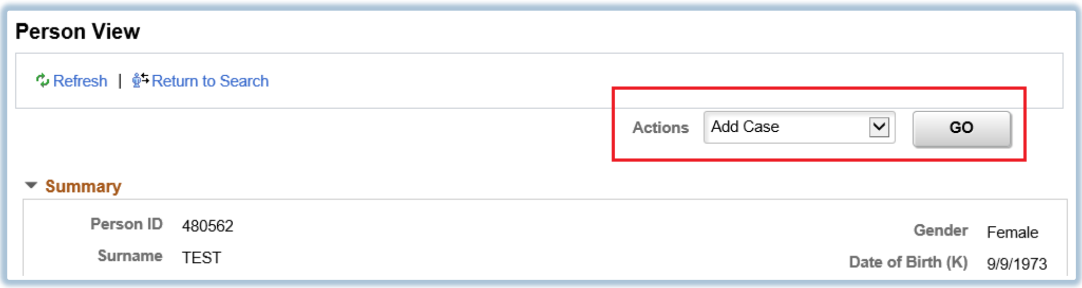
If incorrect or no results are displayed in the Person Search, select **Create New Case** in the Action drop down list and click **Go**.



b. Adding a Case to an Existing Client

Search for the client on **Person Search** and navigate to the client's **Person View** from the Search Results.

In the Action drop down list on **Person View**, select **Add Case** and click **Go**



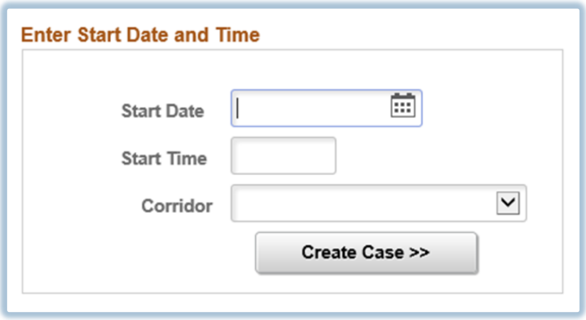
2. INITIAL DETAILS OF THE CASE:

Record the appropriate **Start Date.**

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

Select the relevant **Corridor** in which the user creating the case is working in.

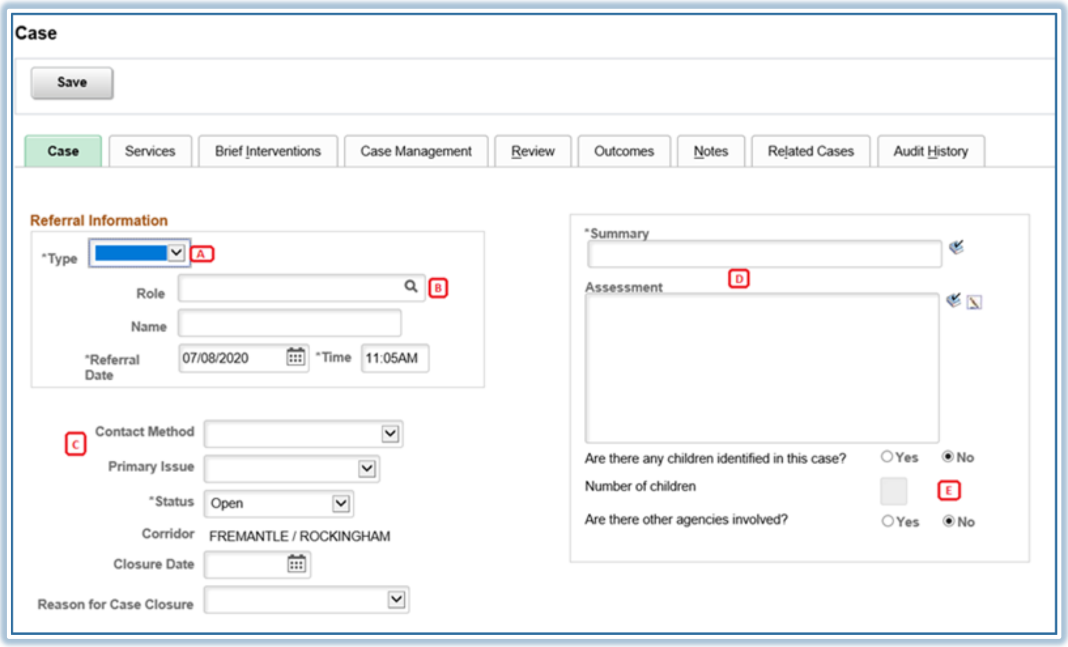
Click on **Create Case**



3. COMPLETE THE REFERRAL INFORMATION:

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

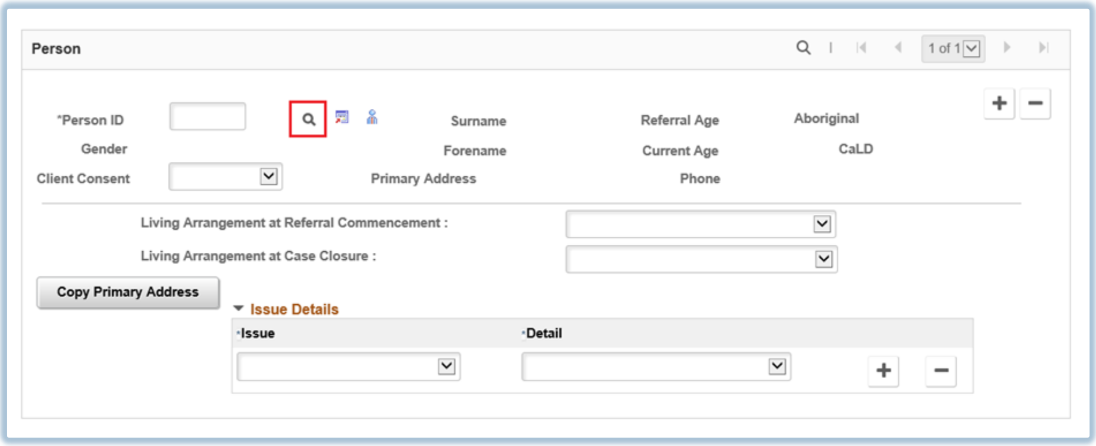
Please Note: If a person is required to be selected as the referrer, and they do not appear in the search, they will need to be created in the system.



4. ADDING A CLIENT:

a. Search for the Client:

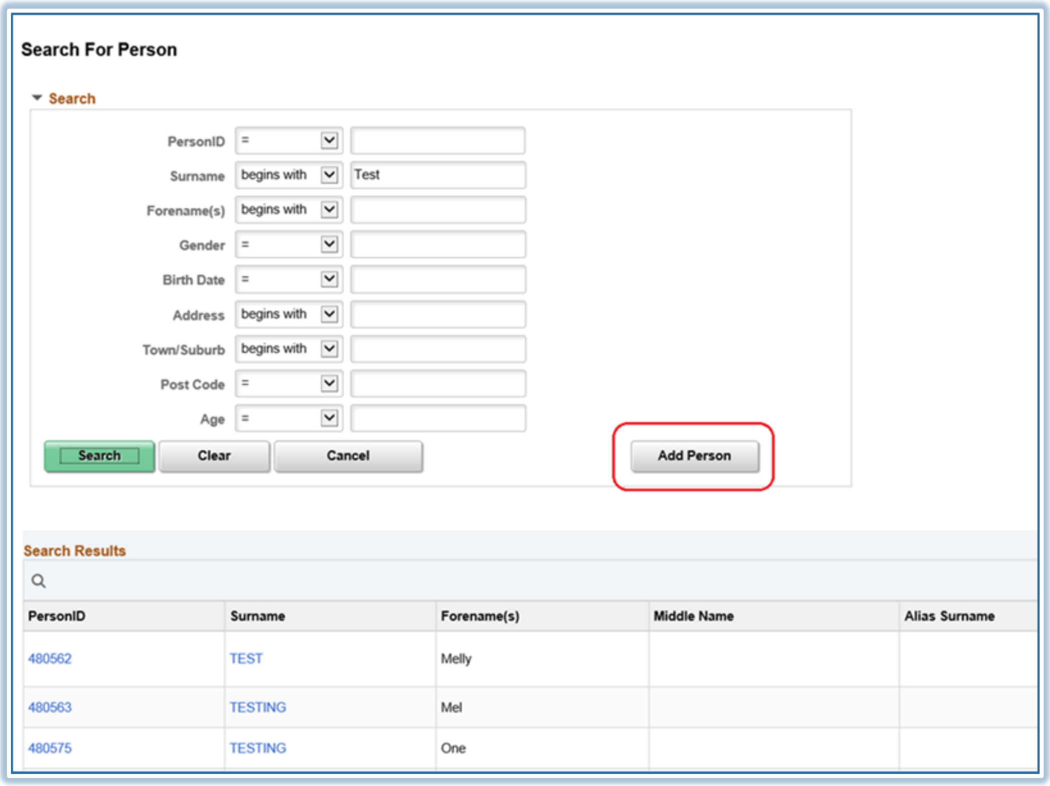
- Scroll down to record the Persons attached to the case.
- Select the search icon to search for the Person.



b. Selecting the Client:

If the name returned in your search is correct select the hyperlink to continue.

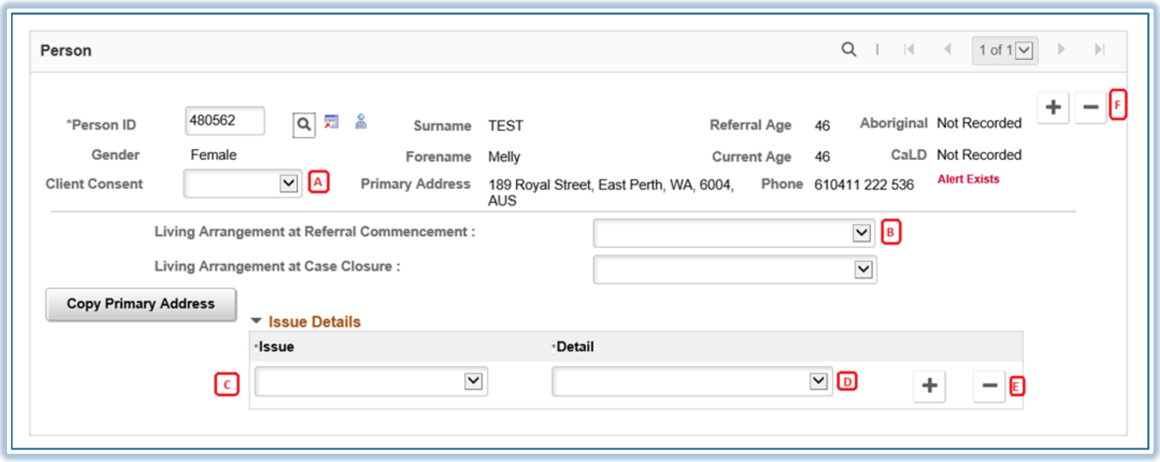
If your search does not return the correct person select the Add Person button and refer to the relevant user guide to record a Person's details.



5. ENTERING IN CLIENT INFORMATION:

Complete the Person details:

a. **Client Consent.**
b. **Living Arrangement at Referral Commencement**
c. **Issue**
d. **Detail.**
e. To add or remove **Issues**, use + −
f. To add or remove **Persons**, use + −



6. SAVING THE CASE:

Click on **Save** to save the case.

Refer to the individual user guides for further information on the other tabs within an Assessment and Coordination Case to enter.