How do I… Case/Person Maintenance

How Do I…?	Selections	Tips & Guidelines
View/Update Case	▪ From the Desktop, click the **Cases** expando, and choose the <u>case name</u> hyperlink. Maintain Case page opens with Participants tab displayed. ▪ Change the Case Name, Case Type, Family Structure, or Service Roles as appropriate. ▪ Select Relationships, Address, Professional/Other Contacts, or Closing History Tab to enter updated field information, if applicable. ▪ If applicable, click the **Options** dropdown and select the applicable option. Click **Go**. ▪ If Submit Case Closure is selected, select Reason from drop down list, enter Closure Summary text, and other field information, if applicable. Click **Save**, and then click **Close**. ▪ If *Delink Intake* is selected, enter appropriate information on the *Delink Access Report* page, and then click Save and then click Close. ▪ Once appropriate updates are entered, click **Save**. ▪ Click **Close** once all updates have been saved or to close the page without making updates.	
View/Update Case Participant	▪ From the Desktop, click the **Cases** expando, click on the <u>case name</u> hyperlink. Maintain Case page opens with Participants tab displayed. ▪ The Deactivate or Reactivate and Remove hyperlinks display for each participant. Use Remove to delete the participant from the case, and Re-Activate or De-Activate to change status. ▪ Only a supervisor can remove a participant. ▪ From the Participants tab, select the <u>participant name</u> hyperlink in the Participants group box. ▪ The Person Management page displays, on the Basic tab. Enter, edit and/or view the applicable data/values in appropriate fields on the Basic, Additional, AKA Names, Address, Relationship and Disability/AFCARS tabs field information. Click **Save** and **Close**. ▪ Once appropriate updates are entered, click **Save**. ▪ Click **Close** once all updates have been saved or to close the page without making updates.	*When the First Name or Last Name fields are updated, confirmation dialog box displays for you to confirm whether or not you want to create an AKA record for the previous name. Clicking 'Yes' will prompt FSFN to automatically create a row on the AKA tab.*
View/Update Participant Relationship	▪ From the Desktop **Cases** expando, click on the <u>case name</u> hyperlink. Maintain Case page opens with Participants tab displayed. ▪ Select *Relationship* tab. ▪ Click in the Subjects drop-down values to change the names. ▪ Click in the Relationships drop-down values to change the relationships. ▪ Click **Insert** to add Relationships, or select Delete hyperlink to remove a displayed relationship. ▪ Once appropriate updates are entered, click **Save**. ▪ Click **Close** after all updates have been saved or to close the page without making updates.	

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Add Case Participant	▪ From the Desktop **Cases** expando, click on the case name hyperlink. Maintain Case page opens with Participants tab displayed.
	▪ Click **Insert**.
	▪ From the Search Person page, enter the applicable data/values and click **Search**.
	  ▪ For a match: Click the Select hyperlink for the applicable person(s) and click **Continue**.
	  ▪ For no match: If displayed, click **Close** on the Validation Errors web page dialog box on the Search page. Click **Create** to access the Person Management page. Enter all applicable data/values for the new person.
	▪ Click **Save** and then **Close** on the Person Management page. On the Search Person page, click **Continue**.
		After completion of creating a new person, if potential person matches exist within the application, the Potential Person Match page will display a list of participants that appear to be an exact person match.
		To proceed with creating a new person without selecting a match from the list, click Close.

Update Case Address View/Update Participant Address	▪ From the Desktop **Cases** expando, click on the case name hyperlink. Maintain Case page opens with Participants tab displayed. ▪ Select the *Address* Tab, and then enter the applicable data/values. ▪ Click **Save** and then **Close**. If you want to apply the case address to all case participants, update appropriate fields, and then click **Update**. ▪ On the Participants tab, click on the participant's name hyperlink in the Participants group box. ▪ From the Person Management page, select the *Address* tab then click the Edit hyperlink to update address. ▪ If no address has been entered, click Insert and then click Yes to the message. ▪ Enter the applicable data/values on the Address Management page. ▪ Select either the Suggested Address or the User Entered Address radio button. ▪ Click **Continue**. ▪ **Save.**	*FSFN will store an unlimited number of addresses for a person.*

Add Professional/Other Contact	▪ From the Maintain Case page, select *Professional/Other Contacts* tab.
	▪ From the Professional Contacts group box, click **Insert**.
	▪ On the Search Person page, enter the applicable data/values, and then click **Search**.
	  ▪ For a match: Click the *Select* hyperlink for the applicable person(s) and click **Continue**.
	  ▪ For no match: click **Close** on the Validation Errors pop up, and then click **Create** to access the Person Management page.
	  ▪ Enter all applicable data/values for the new person.
	  ▪ Click **Save** and then **Close** on the Person Management page.
	▪ On the Search Person page, click **Continue**, and then click **Save**.
	▪ From the Other Contacts group box, click **Insert.**
	▪ Enter *Name, Role,* and *Phone* information.
	▪ Click **Save.**
		The Professional/Other Contacts will add the person to the FSFN database. It is meant for recurring contacts such as attorneys, physicians, guardian ad litems, etc.
		After completing the Person Management page to create the record for new Professional Contact for whom there was no match, you will be returned to the Search Person page to complete the search in order to add the Professional Contact to the case.
		
		To delete a Professional Contact, select the Delete hyperlink for the applicable Professional Contact.
		
		The Other Contacts is free text, not searchable and not added to the FSFN database.
		To delete a contact, click Delete hyperlink for the applicable contact.

How Do I…?	Selections	Tips & Guidelines

Create Case Closure	▪ From the Desktop **Cases** expando, click the case name hyperlink.
	▪ From the Maintain Case page, click the **Closing History** tab.
	▪ From the Options dropdown, select *Submit Case Closure Request* and then click **Go**.
	▪ From the Case Closure page, select the *Request for Closure* checkbox.
	▪ Select the Reason. If you select the reason *Adoption Finalized*, select the *Adopted By* value.
	▪ Enter the Closure Summary in the Closure Summary narrative text box..
	▪ If a completed checklist is required to request the case closure:
	    ▪ From the Closing Checklist dropdown, select *Ongoing Case Closure Checklist*.
	    ▪ From the Options dropdown, select *Checklist*, and then click **Go**.
	    ▪ From the Ongoing Case Closure Checklist page, complete the checklist. After it is complete, select the *Checklist Complete?* checkbox.
	    ▪ Click **Save** and then **Close**.
	▪ If a completed checklist is not applicable, select *Check Here If Case Closing Checklist is Not Applicable*.
	▪ From the Case Closure page click **Save**, and then **Close**.
		Except for Pre-Adoptive cases, FSFN allows users to open, close, and re-open cases several times. To ensure that workers have access to historical information, the Closing History tab displays information about each case closing.
		
		The Case History group box contains a record for every case closure. Each record displays the open and closed dates, and the reason for closure.

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- From the Desktop Outliner **Cases** expando, click the case name hyperlink.
- From the Maintain Case page, click the **Closing History** tab.
- From the Closing History tab, select case closure status hyperlink if applicable.
- If case closure request is accepted, click on the Accepted hyperlink:
  - From the Options dropdown, select *Approval*, and then click Go.
  - From the Approval History page, select *Approve*,* and then click **Continue**.
  - Click **Save**.

*If default supervisor is incorrect, reroute the approval.

  - From the On the Closing History tab, click **Close.**

- If case closure request is denied:
  - Expand the Closure Denial Messages section on the Case Closure page or refer to the Closure Denial Report for information regarding issues that need to be resolved before the case closure request can be accepted.
  - From the Options dropdown, select *Closure Denial* Report, and then click **Go**.
  - Review and correct incomplete or missing work.
  - Re-submit the case closure request.

Note: For case closure requests that have been denied, you may have incomplete work or you may be missing work, which requires you to create new work to address the case closure denial reason.

  - If the case closure request was denied due to incomplete work, after you finish any incomplete work, FSFN automatically processes the pending case closure request again. There is no need to re-submit the case closure request. However, you must complete the case closure request following the steps outlined above to ensure the request is approved and the case subsequently closed.

  - If the case closure was denied due to missing work, which requires new work to be created, select *Not Approve* for the closure request. Selecting *Not Approve* will end the request process allowing you to create new work for the case. You must then re-submit the case closure request.

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If a case is undergoing a closure, you will not be able to request a new case closure for the case.

The closure status will remain pending until the closure batch is run, which prepares and verifies the closure request.
Case closure status (Pending, Not Requested, Requested, Denied, Accepted, Historical) is updated by the FSFN batch program that checks to determine whether the case work is completed and the case can be closed.

A value of Accepted activates the Approvals button.

The request for case closure may be denied if any of the following items is not completed:

- *Open Living Arrangement,*
- *Intake not linked to an Investigation,*
- *PS Reports without completed Initial Assessments,*
- *Open Placement, Medicaid Certifications Not Complete,*
- *Pending or Ongoing Plans,*
- *Participants in Protective Custody or Approval Processing Not Complete.*

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