Closing an OhioKAN Case

Knowledge Base Article

Closing an OhioKAN Case

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Closing an OhioKAN Case

Overview

This article describes the process for closing an OhioKAN Case service episode.

When the case is closed, all assignments are automatically ended, and the case no longer displays in the Navigator's workload. A case can be reopened in the future if needed, by linking a new intake.

Note: Before a case can be closed, all work items must be in a completed or approved status. There cannot be any in progress or pending work remaining in the case.

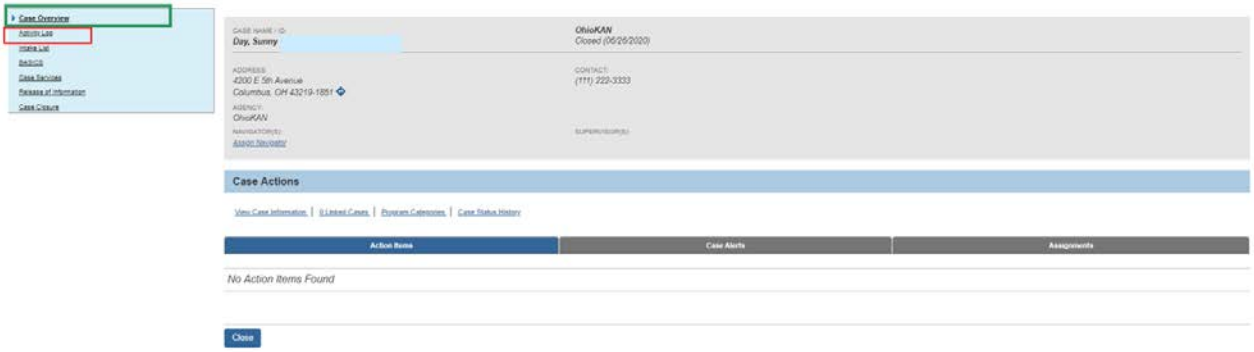
Recording the Closure Summary Activity Log

From the SACWIS Home screen

1. Click the **Case** tab.
2. Click, **Workload**.
3. Select the Case ID to navigate to the Case you wish to close.

The **Case Overview** screen appears.

4. In the navigation pane, click **Activity Log**.



The **Activity Log** screen appears.

5. Click, **Add Activity**.

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The **Activity Detail** page appears.

Note: The **Start Activity Date** defaults to the current date, but can be backdated, if needed. This will not affect the closure date, which will always be the date the Case Closure record is approved, as outlined later in this article.

1. If necessary, select the **Responsible Worker** from the drop-down menu.
2. In the **Contact Types** grid, select **General** from the **Available Contact Types** list; this will activate the **Add** button.
3. Click, **Add**, to move the value to the **Select Contact Types** list.
4. Select **Case Closure** from the **Category** drop-down menu.
5. Select **Case Closure Summary** from the **Available Sub Categories** list (this will activate the **Add** button).
6. Click, **Add**, to move the value to the **Select Sub Categories** list.
7. Click the **Participants** tab at the top of the page.

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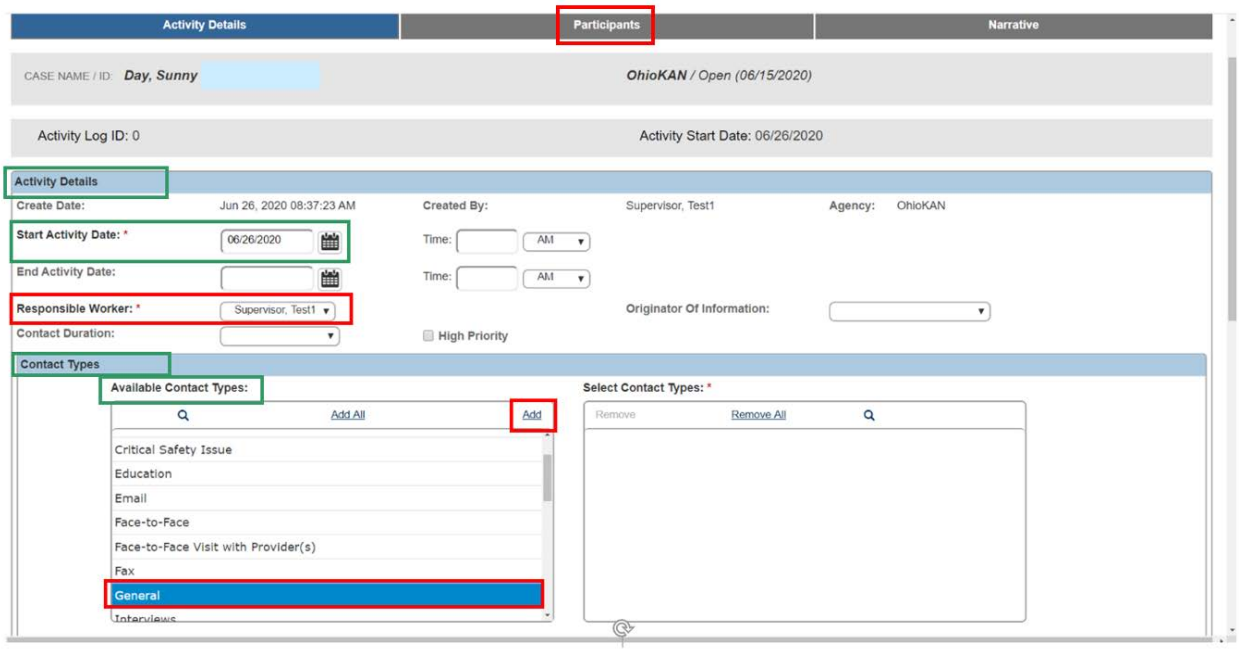

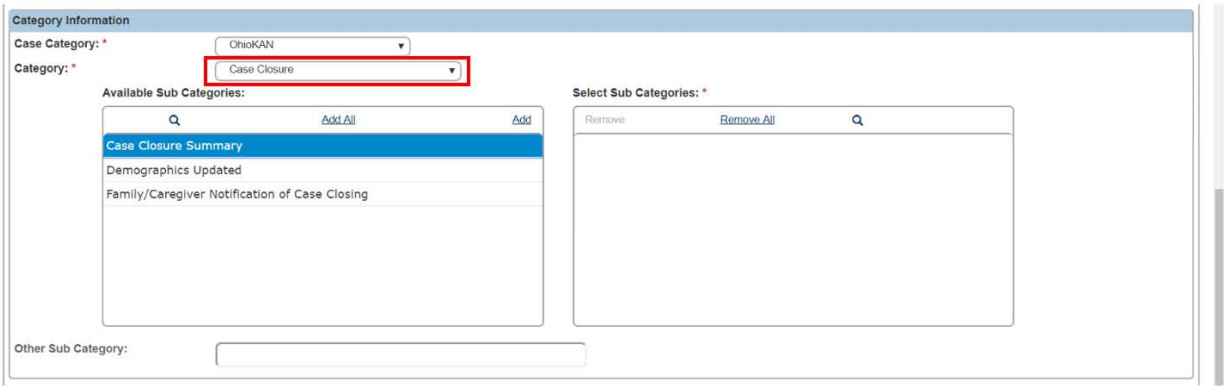

The **Participants** screen appears.

8. Select the relevant **Contact Status** radio button for each applicable Case Participant.
9. Click the **Narrative** tab at the top of the page.

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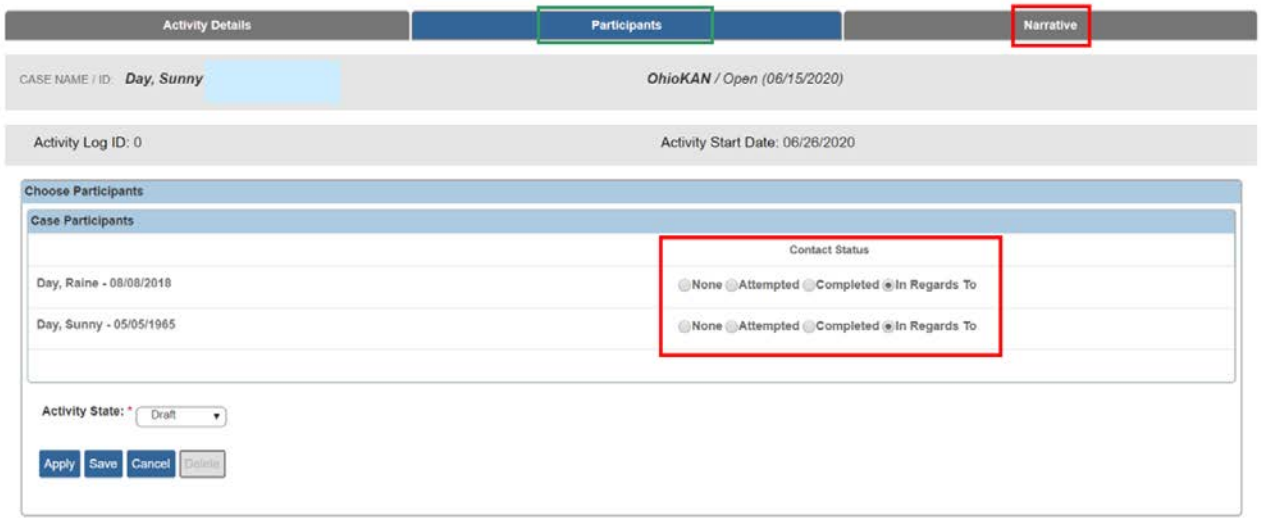
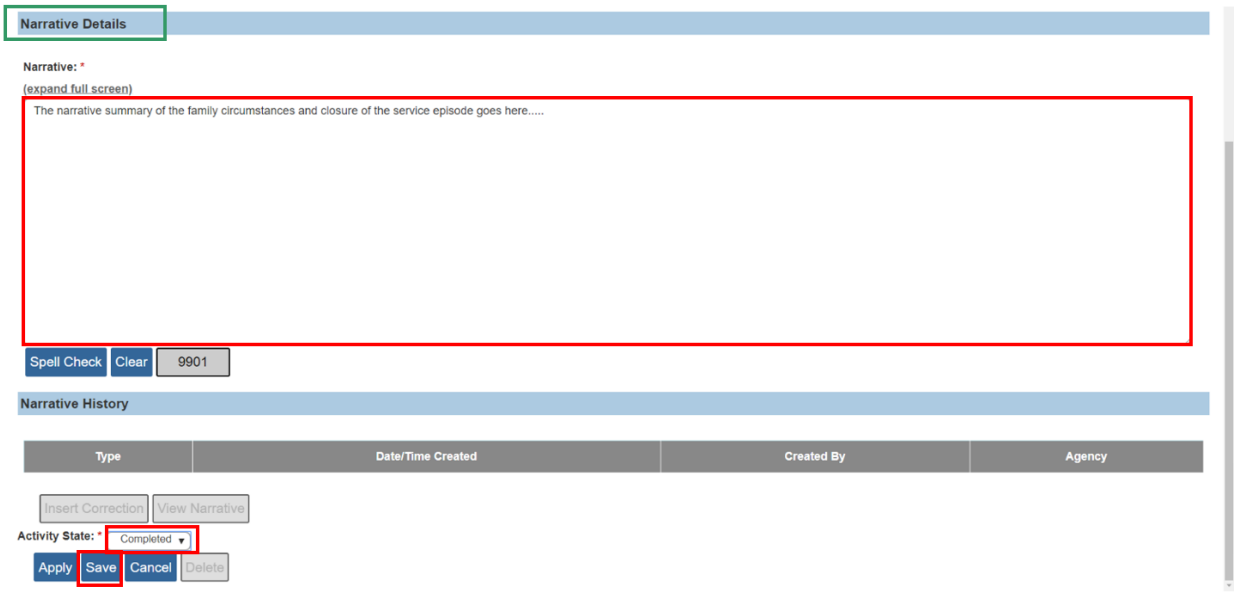


The **Narrative Details** screen appears.

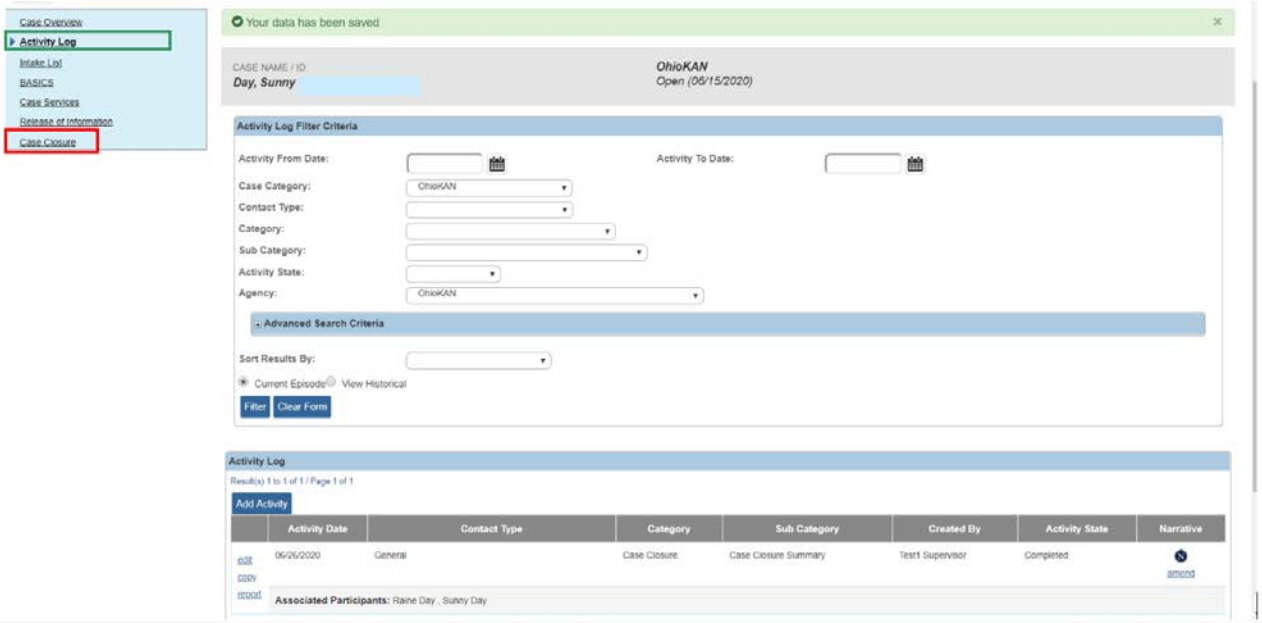
10. In the **Narrative** field, type a brief summary based on OhioKAN business practice about closing the service episode.
11. Select **Completed** in the **Activity State** drop-down menu.
12. Click **Save**.



The **Activity Log** list page appears, showing the Closure Summary.

Recording the Case Closure

1. In the navigation pane, click **Case Closure**.



The **Case Closure** list page appears.

2. Click **Add Case Closure**.

The **Case Closure Details** screen appears.

3. Select all applicable options from the **Available Case Closure Reasons** list.
4. Click **Add** to move the selection(s) to the **Selected Case Closure Reasons** grid.

Note: If **Other** is selected, narrative is required in the **If Other Reason, Explain** field.

5. Select the **Primary Closure Reason** from the drop-down menu, which contains all the reasons selected above.

Note: The **Case Closure Summary Information** grid displays the most recent Case Closure Activity Log, which is automatically linked to the Case Closure record. If the Activity Log linked is incorrect, click **unlink** to remove it, then click **Link Activity** to select another one.

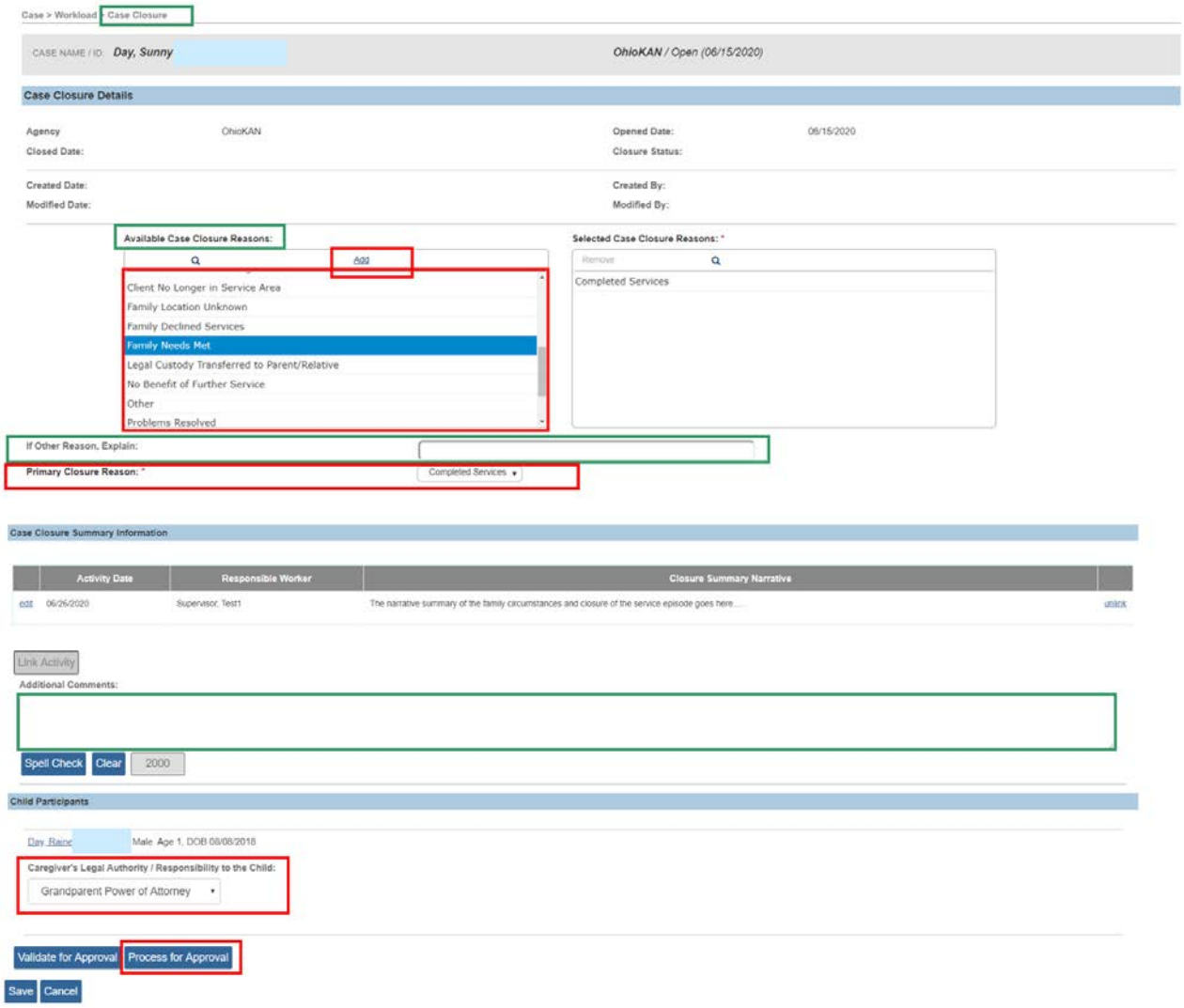
A Case Closure Activity Log is required to process the Case Closure.

6. Record any **Additional Comments**, if desired.

7. For each Child Participant, select the option that best describes the **Caregiver's Legal Authority / Responsibility to the Child** at the time of the service episode closure.

Note: All children who have been listed as participants in an OhioKAN BASICS during the case episode will display in the list, even if they are no longer active members of the case.

8. Click **Process for Approval**.



The **Process Approval** screen appears.

Routing the Case Closure for Approval

1. Select the approval **Action** from the drop-down menu.
    - If you are a Navigator, select **Route** and select the name of the Supervisor from the **Reviewer/Approvers** drop-down menu.

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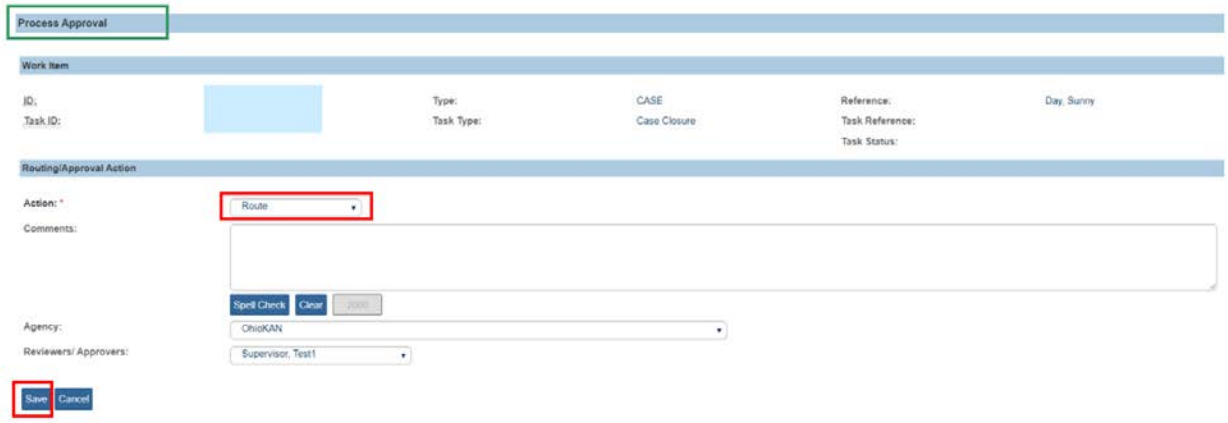
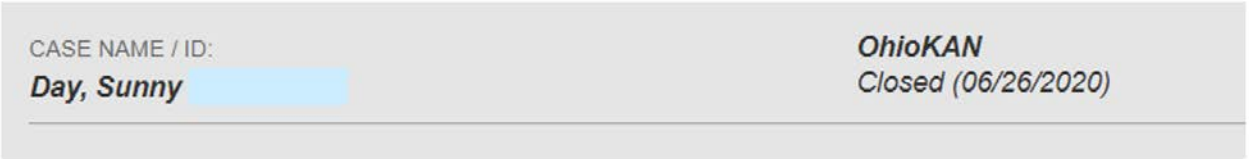
- If you are a Supervisor, select **Approved-Final** to close the case.
- Or, select **Declined for re-work** to return it to the Navigator for corrections.

Note: If you are a Supervisor, and the **Case Closure** has been routed to you for approval, you may access the Case Closure from the Home page, **Approvals** tab.

2. Click **Save**.



On approval of the **Case Closure** record, the case status is updated to **Closed**.



If you need additional information or assistance, please contact the SACWIS Help Desk at 614-466-0978, select option #3, then #5.