

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

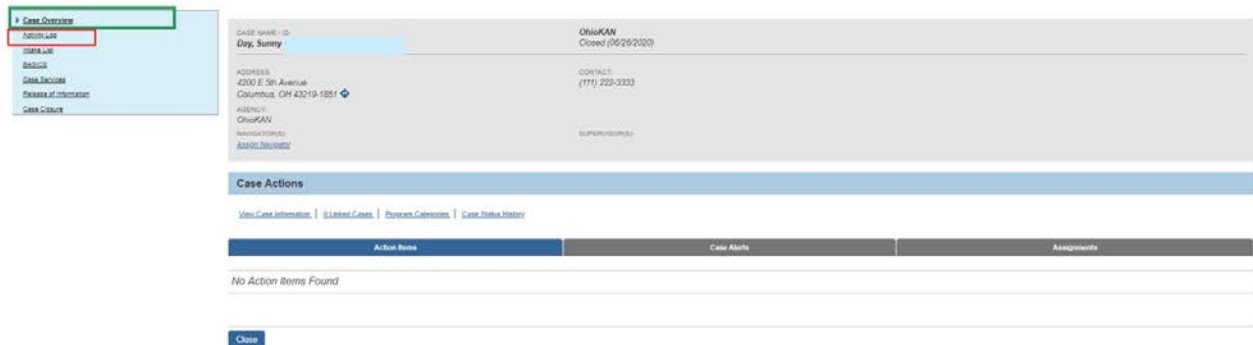
From the SACWIS Home screen

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**.

Closing an OhioKAN Case

Case Closure

Activity Log

Data List

BASIS

Case Actions

Release of Information

Case Contact

Case #1001 - 0: Day, Sunny

OhioKAN Closed (06/09/2020)

Activity Log Filter Criteria

Activity From Date: [] Activity To Date: []

Case Category: []

Contact Type: []

Category: []

Sub Category: []

Activity State: []

Agency: []

Advanced Search Criteria

Sort Results By: []

Current Entries View Historical

Filter Clear Form

Activity Log

Results: 1 of 1 (1 of 1) Page 1 of 1

Activity Date	Contact Type	Category	Sub Category	Created By	Activity State	Monitor
06/09/2020	General	Case Closure	Case Closure Summary	Test Subuser	Completed	ESCAL

Associated Participants: Name City - Sunny Day

Add Activity Generate Report

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 screenshot displays the 'Participants' tab in the OhioKAN system. At the top, there are three tabs: 'Activity Details', 'Participants' (highlighted with a red box), and 'Narrative'. Below the tabs, the case information is shown: 'CASE NAME / ID: Day, Sunny' and 'OhioKAN / Open (06/15/2020)'. The 'Activity Log ID: 0' and 'Activity Start Date: 06/26/2020' are also visible.

The 'Activity Details' section contains the following fields:

- Create Date: Jun 26, 2020 08:37:23 AM
- Created By: Supervisor, Test1
- Agency: OhioKAN
- Start Activity Date: * 06/26/2020 (calendar icon)
- End Activity Date: (calendar icon)
- Responsible Worker: * Supervisor, Test1 (dropdown menu)
- Contact Duration: (dropdown menu)
- High Priority:
- Originator Of Information: (dropdown menu)

The 'Contact Types' section is divided into two panes:

- Available Contact Types:** A list of contact types including Critical Safety Issue, Education, Email, Face-to-Face, Face-to-Face Visit with Provider(s), Fax, **General** (highlighted with a red box), and Interviews. An 'Add' button (highlighted with a red box) is located to the right of the list.
- Select Contact Types: *** An empty selection area with 'Remove' and 'Remove All' buttons and a search icon.

The 'Category Information' section includes:

- Case Category: * OhioKAN (dropdown menu)
- Category: * Case Closure (dropdown menu, highlighted with a red box)
- Available Sub Categories:** A list of sub-categories including Case Closure Summary (highlighted with a blue box), Demographics Updated, and Family/Caregiver Notification of Case Closing. 'Add All' and 'Add' buttons are present.
- Select Sub Categories: *** An empty selection area with 'Remove' and 'Remove All' buttons and a search icon.
- Other Sub Category: (text input field)

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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Activity Details | **Participants** | Narrative

CASE NAME / ID: Day, Sunny OhioKAN / Open (06/15/2020)

Activity Log ID: 0 Activity Start Date: 06/26/2020

Choose Participants

Case Participants

	Contact Status
Day, Raine - 08/08/2018	<input type="radio"/> None <input type="radio"/> Attempted <input type="radio"/> Completed <input checked="" type="radio"/> In Regards To
Day, Sunny - 05/05/1965	<input type="radio"/> None <input type="radio"/> Attempted <input type="radio"/> Completed <input checked="" type="radio"/> In Regards To

Activity State: * Draft

Apply Save Cancel Delete

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**.

Narrative Details

Narrative: *
(expand full screen)

The narrative summary of the family circumstances and closure of the service episode goes here.....

Spell Check Clear 9901

Narrative History

Type	Date/Time Created	Created By	Agency
------	-------------------	------------	--------

Insert Correction View Narratives

Activity State: * Completed

Apply Save Cancel Delete

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

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Recording the Case Closure

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

Your data has been saved

CASE NAME / ID: OhioKAN
Day, Sunny Open (06/15/2020)

Activity Log Filter Criteria

Activity From Date: [] Activity To Date: []

Case Category: OhioKAN

Contact Type: []

Category: []

Sub Category: []

Activity State: []

Agency: OhioKAN

Advanced Search Criteria

Sort Results By: []

Current Episode View Historical

Filter Clear Form

Activity Log

Results: 1 to 1 of 1 / Page 1 of 1

Add Activity

Activity Date	Contact Type	Category	Sub Category	Created By	Activity State	Narrative
06/06/2020	General	Case Closure	Case Closure Summary	Terril Supervisor	Completed	unlink

Associated Participants: Raine Day, Sunny Day

The **Case Closure** list page appears.

2. Click **Add Case Closure**.

< >

CASE NAME / ID: OhioKAN
Day, Sunny Open (06/15/2020)

Case Closure(s)

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.

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- 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.

- Click **Process for Approval**.

Case > Workload > Case Closure

CASE NAME / ID: Day, Sunny OhioKAN / Open (06/15/2020)

Case Closure Details

Agency: OhioKAN Opened Date: 06/15/2020
Closed Date: Closure Status:
Created Date: Created By:
Modified Date: Modified By:

Available Case Closure Reasons:

- Client No Longer in Service Area
- Family Location Unknown
- Family Declined Services
- Family Needs Met**
- Legal Custody Transferred to Parent/Relative
- No Benefit of Further Service
- Other
- Problems Resolved

Selected Case Closure Reasons: *

- Completed Services

If Other Reason, Explain:

Primary Closure Reason: * Completed Services

Case Closure Summary Information

Activity Date	Responsible Worker	Closure Summary Narrative
06/26/2020	Supervisor, Test	The narrative summary of the family circumstances and closure of the service episode goes here...

Link Activity

Additional Comments:

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Child Participants

Day, Rain Male Age 1, DOB 08/08/2018

Caregiver's Legal Authority / Responsibility to the Child:
Grandparent Power of Attorney

Validate for Approval **Process for Approval**

Save Cancel

The **Process Approval** screen appears.

Routing the Case Closure for Approval

- 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**.

The screenshot shows a web form for routing an approval. At the top, there is a 'Process Approval' tab. Below it is a 'Work Item' section with fields for ID, Task ID, Type (CASE), Task Type (Case Closure), Reference, and Day (Sunny). The 'Routing/Approval Action' section contains an 'Action' dropdown menu with 'Route' selected, a 'Comments' text area, and an 'Agency' dropdown menu with 'OhioKAN' selected. Below the agency dropdown is a 'Reviewers/ Approvers' dropdown menu with 'Supervisor, Test1' selected. At the bottom left of the form, there are 'Save' and 'Cancel' buttons.

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

The screenshot shows a summary of the case status. On the left, it displays 'CASE NAME / ID:' followed by 'Day, Sunny' and a redacted ID. On the right, it displays 'OhioKAN' and 'Closed (06/26/2020)'.

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