

Closing a Bridges Case



Knowledge Base Article

Closing a Bridges Case

Table of Contents

Overview	3
Creating the Activity Log	3
Adding a Case Closure	7
Processing for Approval	8

Closing a Bridges Case

Overview

This article provides step-by-step instruction for closing a Bridges case.

Important: Prior to closing a Bridges case, please be certain of the following:

- There are no Activity Logs in “Draft” status;
- The Bridges Legal Custody Episode has been end-dated;
- The Housing Record has been end-dated; and,
- Tier Level has been end-dated.

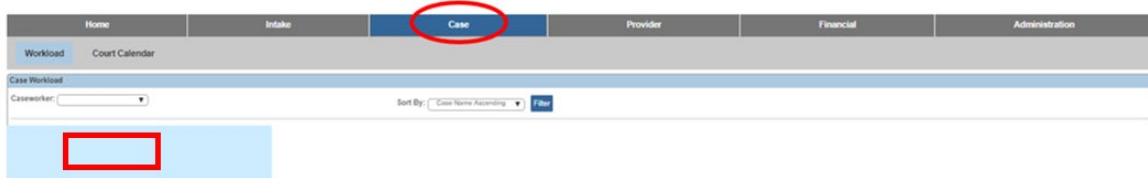
Important: An Activity Log for case closure must be completed prior to closing a case. Please see instructions below for completing an Activity Log.

From the Ohio SACWIS home screen:

1. Click the **Case** tab.
2. Click, **Workload**.
3. Click the name of the appropriate caseworker.

A list of cases appears.

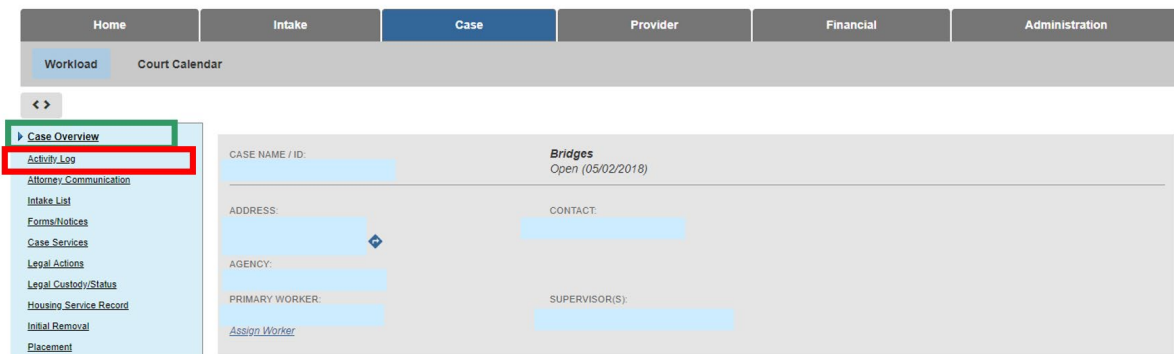
4. Click the appropriate case number.



The **Case Overview** screen appears.

Creating the Activity Log

1. Click, **Activity Log**, in the navigation pane.



Closing a Bridges Case

The **Activity Log** screen appears.

2. Click, **Add Activity**.

Case Overview
Activity Log
Attorney Communication
Intake List
Forms/Notices
Case Services
Legal Actions
Legal Custody/Status
Housing Service Record
Initial Removal
Placement
Independent Living
Bridges Application / VPA
Bridges Assessment
Bridges Plan
Bridges Review
Family Team Meeting
Case Conference Note
Case Closure
Agency Case Transfer

CASE NAME / ID: Bridges
Open (05/02/2018)

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 Episode View Historical

Filter Clear Form

Activity Log

Result(s) 1 to 5 of 5 / Page 1 of 1

Add Activity

Add Activity Generate Report

The **Activity Details** screen appears.

3. Make a selection from the list of **Available Contact Types** in the **Contact Types** grid (this will activate the **Add** feature).
4. Click, **Add** (this will place your selection in the **Select Contact Types** box).

Activity Details

CASE NAME / ID: Bridges / Open (05/02/2018)

Activity Log ID: 0 Activity Start Date: 05/24/2018

Activity Details

Create Date: May 24, 2018 09:55:05 AM Created By: [] Agency: []

Start Activity Date: * 05/24/2018 Time: [] AM

End Activity Date: [] Time: [] AM

Responsible Worker: * [] Originator Of Information: []

Contact Duration: [] High Priority

Contact Types

Available Contact Types:

Announced Home Visit
Collateral
Court
Critical Safety Issue
Education
Email
Face-to-Face
FACE-TO-FACE VISIT WITH PROVIDER(S)

Select Contact Types: *

Add

5. Select **Bridges** from the **Case Category** drop-down menu in the **Category Information** grid.
6. From the **Category** drop-down menu, select **Case Closure**.
7. Select, **Case Closure Summary** from the list of **Available Sub Categories**.
8. Click, **Add**.

Closing a Bridges Case

Category Information

Case Category: * Bridges

Category: * Case Closure

Available Sub Categories:

- Case Closure Summary
- Demographics Updated
- Family/Collateral Notification of Case Closing
- Kinship Support Plan
- RMS(Random Moment Sample)
- Safety Plan Monitoring Event/Task

Select Sub Categories: *

Remove Remove All

Other Sub Category:

9. From the top of the page, click the **Participants** tab.

Activity Details Intake Info **Participants** Narrative

CASE NAME / ID: Bridges / Open (05/02/2018)

Activity Log ID: 0 Activity Start Date: 05/24/2018

Activity Details

Create Date: May 24, 2018 09:55:08 AM Created By: Agency:

Start Activity Date: * 05/24/2018 Time: AM

End Activity Date: Time: AM

Responsible Worker: * Originator Of Information:

Contact Duration: High Priority

The **Participants** screen appears.

1. Make a selection from the available options under, **Contact Status**.
2. Click the **Narrative** tab.

Activity Details Intake Info **Participants** Narrative

CASE NAME / ID: Bridges / Open (05/02/2018)

Activity Log ID: 0 Activity Start Date: 05/24/2018

Associate Participants

Case Participants

Contact Status

None Attempted Completed In Regards To

Activity State: * Draft

Apply Save Cancel Delete Print

The **Narrative** screen appears.

1. Enter text in the **Narrative** text box in the **Narrative Details** grid.
2. Select, **Completed** from the **Activity State** drop-down menu.

Important: Prior to selecting Completed, be certain to carefully review the record; once you have selected Completed, you will not be able to edit the Narrative.

3. Click, **Save**.

Closing a Bridges Case

Activity Details Intake Info Participants **Narrative**

CASE NAME / ID: [redacted] *Bridges / Open (05/02/2018)*

Activity Log ID: [redacted] Activity Start Date: 05/24/2018

Associated Participants :

Narrative Information

Narrative Details

Narrative: *
(expand full screen)

test

Narrative History

Type	Date/Time Created	Created By	Agency
Original	05/24/2018 12:09 PM	[redacted]	[redacted]

Insert Correction View Narrative

Activity State: * Completed ▾

Apply **Save** Cancel Update Move

The **Activity Log** screen appears.

1. Select, **Case Closure**, from the navigation pane.

Case Overview

Activity Log

Attorney Communication

Intake List

Forms/Notices

Case Services

Legal Actions

Legal Custody/Status

Housing Service Record

Initial Removal

Placement

Independent Living

Bridges Application / VPA

Bridges Assessment

Bridges Plan

Bridges Review

Family Team Meeting

Case Conference Note

Case Closure

Agency Case Transfer

Your data has been saved

CASE NAME / ID: [redacted] *Bridges*
Open (05/02/2018)

Activity Log Filter Criteria

Activity From Date: [calendar icon] Activity To Date: [calendar icon]

Case Category: ▾

Contact Type: ▾

Category: ▾

Sub Category: ▾

Activity State: ▾

Agency: ▾

Advanced Search Criteria

Sort Results By: ▾

Current Episode View Historical

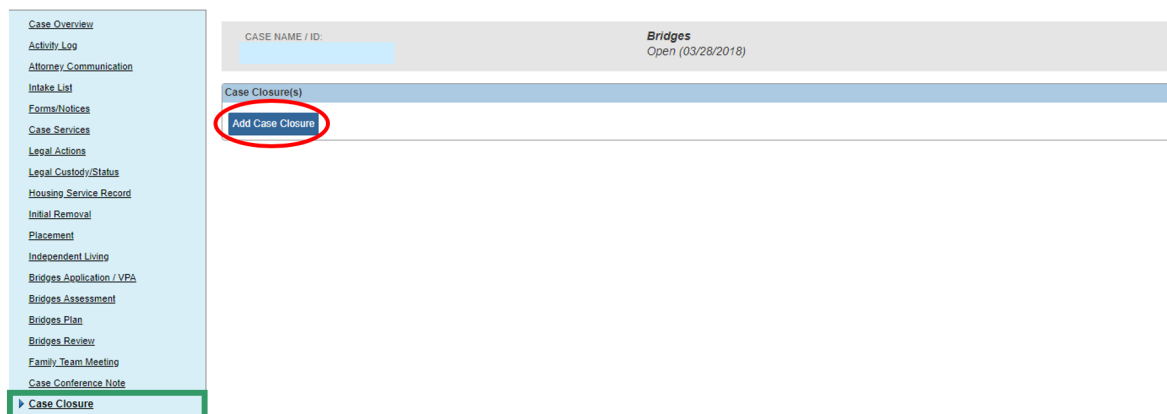
Filter Clear Form

Closing a Bridges Case

The **Case Closure** screen appears.

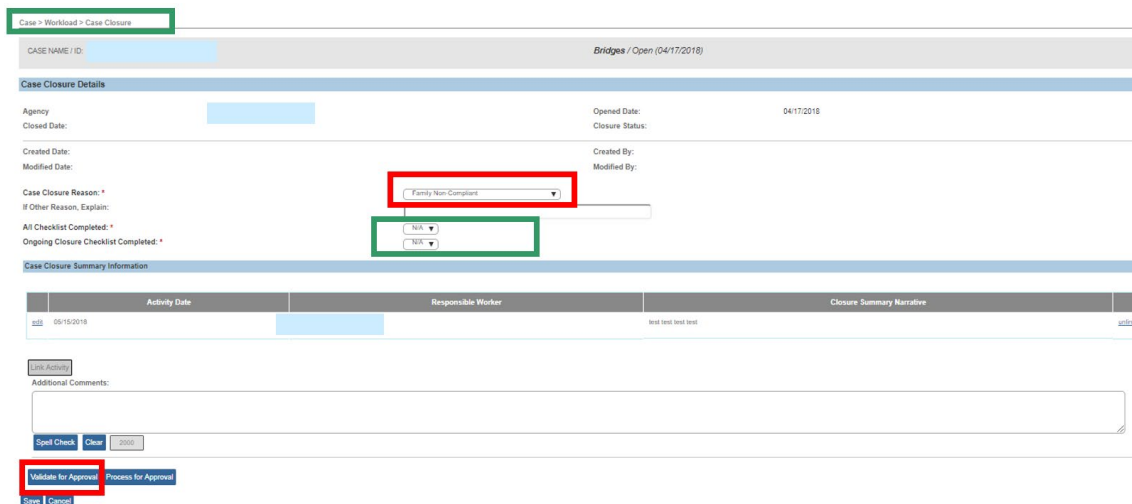
Adding a Case Closure

1. Click, **Add Case Closure**.



The **Case Closure** screen appears.

2. Make a selection from the **Case Closure Reason** drop-down menu.
3. The **AI Checklist Completed** and the **Ongoing Closure Checklist Completed** responses will remain as **N/A**.
4. Click, **Validate for Approval**.



The **Case Closure Details** screen appears. If there are unresolved issues that would prevent the Bridges case from being closed, the **Unresolved Items for Closure** grid will appear (see graphic below), providing the location of the item(s) (**Location** tab), as well as the specifics of the issue(s) (**Message** tab). You will need to click the hyperlink(s) in the Location grid to resolve the issue(s).

Closing a Bridges Case

Case > Workload > Case Closure **Case Closure Details**

CASE NAME / ID: [redacted] *Bridges / Open (03/28/2018)*

Unresolved Items for Closure

Location	Message
Bridges Service Tier	This Young Adult has a non-end dated Service Tier record.
Legal Custody Episode	has a current legal custody episode.

Close

If there are no unresolved issues, the Unresolved Items for Closure grid will still appear, but it will be empty. When there are no unresolved issues:

5. Click, **Close**.

Case > Workload > Case Closure > Case Closure Details

CASE NAME / ID: [redacted] *Bridges / Open (05/02/2018)*

Unresolved Items for Closure

Location	Message
----------	---------

Close

The **Case Closure** screen appears.

Processing for Approval

1. Click, **Process for Approval**.

Case > Workload > Case Closure

CASE NAME / ID: [redacted] *Bridges / Open (04/17/2018)*

Case Closure Details

Agency: [redacted] Opened Date: 04/17/2018
Closed Date: [redacted] Closure Status: [redacted]
Created Date: 05/17/2018 03:14:19 PM Created By: [redacted]
Modified Date: 05/17/2018 03:14:19 PM Modified By: [redacted]

Case Closure Reason: *
If Other Reason, Explain:
All Checklist Completed: *
Ongoing Closure Checklist Completed: *

Case Closure Summary Information

Activity Date	Responsible Worker	Closure Summary Narrative
05/17/2018	[redacted]	test test / test test unlink

[Link Activity](#)

Additional Comments:

The **Process Approval** screen appears.

2. Make a selection from the **Action** drop-down menu. (supervisor can just final approve).
3. Make a selection from the **Reviewers/Approvers** drop-down menu.
4. Click, **Save**.

Closing a Bridges Case

The screenshot displays the 'Process Approval' step in the Bridges Case system. The navigation bar includes Home, Intake, Case, Provider, Financial, and Administration. The 'Approvals' tab is active, showing 'Alerts', 'Action Items', 'Approvals', and 'Assignments'. The 'Process Approval' section is highlighted with a green box. Below this, the 'Work Item' section shows fields for ID, Task ID, Type (CASE), Task Type (Case Closure), Reference, Task Reference, and Task Status. The 'Routing/Approval Action' section contains an 'Action:' dropdown menu (highlighted with a red box) and a 'Comments:' text area. Below the comments area are 'Spell Check' and 'Clear' buttons. The 'Agency:' dropdown is visible, and the 'Reviewers/ Approver:' dropdown (highlighted with a red box) is at the bottom. A 'Save' button is circled in red.

If you need additional information or assistance, please contact the OFC Automated Systems Help Desk at SACWIS_HELP_DESK@jfs.ohio.gov.