

QUICK START GUIDE FOR RECORDING A CASE SERVICE AND COMPLETING A SERVICE REVIEW WITHIN A CASE REVIEW

RECORDING A CASE SERVICE

Navigate to the case

1. Click the Case Service link in the navigation menu
2. Select Case Member or Caregiver/Caretaker from the Service dropdown box and click the Add Case Services Button. (The Caregiver/Caretaker selection can only be made if at least one child is in an out of home placement)
3. The Service Information page is displayed. Enter the Effective Date, Service Category and Service Type. Select the Case Member Name from the dropdown and click the Add Status/Provider button
4. Record the Status and Status Begin Date. You can also add frequency, provider and service goal. To add a frequency, click the Add Frequency button. (If you are not adding a frequency, skip #5. If you are not adding a service goal skip #10 and #11)
5. Record the Expected Frequency information. The Expected

Frequency Start Date should be the date of the first scheduled appointment. Once the information is recorded, click the OK button

6. Record a provider by clicking the Link Provider button (services with a status of referred, scheduled and provided must have a provided linked)
7. Click the Search button
8. Click the select link next to the provider you want to link to this services. (If the provider cannot be found, the provider may need to be added to SACWIS.)
9. The provider is now linked to the service
10. Record a service goal by clicking the Add Service Goal button
11. Select a Service Goal and enter the Effective Date then click OK
12. The service goal is now added
13. Apply to other Members can be done by selecting the box next to the case member name or if you would like to apply to all case members select the box in the header and click save
14. Click Save
15. The Case Service has been recorded

COMPLETING A SERVICE REVIEW WITHIN A CASE REVIEW

Navigate to the Case

1. Click the Case Review/SAR link in the navigation menu
2. Click the edit link next to the "In Progress" Case Review
3. Click the Service Review link
4. Click the Services Link
5. Click the edit link next to the service you are going to review
6. Click the Service Review tab
7. Click the Add Service Review button
8. Complete the necessary information. Enter the Review Date, select the Case Members, Service Recommendation and Participation Status. If Barriers exist, enter the Barrier Type. Complete the necessary narrative text boxes. Select Save.
9. Click the Save button
10. Service Review has been completed. Continue these same steps for all services. When all services have been reviewed, click the Close button.