





Case Management

- Case Management Activities
- **Referrals to Services**
- Services Attended

This set of tip sheets explains how to document and monitor various types of case management services, including case management activities, referrals, and attendance. Total Pages: 2

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Case Management/ Entering Case Management Activities Documentation of case management related services and activities is a pivotal part of monitoring a participant's progress. Please reference the PS Court SMART Training Manual and the SMART PS Court Case Manager's Guide to ensure required fields are completed accurately.

- 1. <u>Entry Steps</u>: Login, Select Facility (if applicable), Client List, Client Profile, Intake, Activity List, PS Court, Case Management.
- 2. Click <u>Add New</u> to make a case management entry.
- 3. Enter the **Event Date** (Note: This will automatically enable the Event Type field.)
- 4. Click on the drop down arrow, and select an **Event Type** (Case Management, Referral to Services, or Services). Note: The Event field options will be associated with the Event Type that is selected.)
- 5. Go to the **Outcome** field, and select the appropriate outcome.
- 6. Go to the **Type of Contact** field, and select the appropriate contact.
- 7. Go to the **Duration** field, and indicate the time allocated to the case management services. For example, a hour session would be documented as 01:00.
- 8. Go to the **Location** field, and select the location of the service. Note: The Location field is required for all 'Face to Face' contacts.
- 9. Signed/Unsigned Notes: This screen contains a Signed/Unsigned note function. To make an editable note, enter the note in the Unsigned Note field and click Save or Finish. To electronically sign the note, enter the note in the Unsigned Note field and click Sign Note. Note: Signing a note will certify its content and preclude further editing. However, if the signed note contains erroneous information or additional data needs to be entered, simply enter the new information in the Unsigned Note box and click Sign Note
- 10. Click **Save** and **Finish**.

Note: To document a case management summary note that will appear on the Client Progress Report, select **Case Management Activities** as the Event Type and choose **Summary Note** as the event. Only signed notes for Summary Notes will appear on the Client Progress Report. The lower section of the screen provides a historical list of Case Management events for a participant's' case. To review an existing record, go to the Actions column, hover over the icon that resembles a pencil, and click **Review**.

User: Gibbs, Sharon 🔻 Location: MBC Trea	atment Center (Tra	ining Agen, Santa Ana 🖋			Genera	ite Report 📔 👁
4	& Client: Pig, P	orky M0601640987PI 1 O Clear Client				
Home Page C	ase Managemen	It Search				
Agency	Event	• Facili	ty			
Group List	Event Type	- Outcom	ne 🗸 🗸	Click	Generate Reno	rt to
Authorization Dashboard	Type of Contact	¥		Cherk	Cenerate Repo	
Client List	Start Date 9/1	5/2015 End Da	te 9/14/2016	print		
Client Profile			Clear Go			
Linked Consents Non-Episode Contact	Case Manageme	ant: Related Services for Pig, Porky Export				Ā
	tions Date	Event	Event Type	Type of Contact	Location	Outcome
- Activity List Ac		Case Management Planning	Case Management Activities	Face to Face	Problem Solving Court Office	Attended
Activity List Court Monitoring	9/14/2016	Case Management Flamming	ouse management ristinges			
Activity List Court Monitoring Judicial Cont Care	 9/14/2016 4/15/2016 	Summary Note	Case Management Activities	Written/Email		N/A
Activity List Court Monitoring Judicial Cont Care Intake	 9/14/2016 4/15/2016 4/11/2016 	Case Management Fraining Summary Note	Case Management Activities	Written/Email	Problem Solving Court Office	N/A Attended
Activity List Court Monitoring Judicial Cont Care Intake Lab/Radiology	 9/14/2016 4/15/2016 4/11/2016 	Case waringenterin i taniming Summary Note Case Management Review	Case Management Activities	Written/Email Face to Face	Problem Solving Court Office	N/A Attended
Activity List Court Monitoring Judicial Cont Care Intake Lab/Radiology Fee Determination	 9/14/2016 4/15/2016 4/11/2016 4/11/2016 	Case was agreened to an internet Summary Note Case Management Review Community Service and Volunteer Projects	Case Management Activities Case Management Activities Services	Written/Email Face to Face Phone Contact	Problem Solving Court Office	N/A Attended Attended

Choosing an Event Type will automatically populate the Event drop down menu, and enable the Type of Contact field.

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User: Gibbs, Sharon 💌 🕴 Location	v MBC Treatment Center (Training Agen, Santa Ana 🖋	 Snapshot
	Lear Client: Pig, Porky M0601640987PI 1 O Clear Client	
Home Page	Case Management: Related Services	
 Agency 	Event Date 9/14/2016 🚔 Staff Name Glibbs, Sharon 🗸	
 Group List 	Event Type Case Management Activities v Event Case Management Planning v	
	Outcome Attended v Type of Contact Face to Face v	
✓ Client List	Duration (HH:MM) 01.00 Location Problem Solving Court Office 💌	
 Client Profile 	Unsigned Note (Work in Progress) Signed Note	
	document your note. (Appended 9/14/2015 10:30:55 AM (Sibbs, Sharon) MBC Treatment Center (Training Agen)	
	Sign Mate	
		Oursel One Circlet
Wait List		Cancel Save Finish
Tx Team		
Screening		

Select Case Management activities as the Event Type and Summary Note as the Event to ensure the Summary Note appears on the Client Progress Report. Notes must be signed in order to appear on the Client Progress Report.