UNIVERSITY OF MARYLAND
INSTITUTE FOR GOVERNMENTAL SERVICE & RESEARCH

SMART Tip Sheets
Case Management

Office of Problem Solving Courts
ADMINISTRATIVE OFFICE OF THE COURTS

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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MARYLAND DEPARTMENT OF HEALTH AND MENTAL HYGIENE

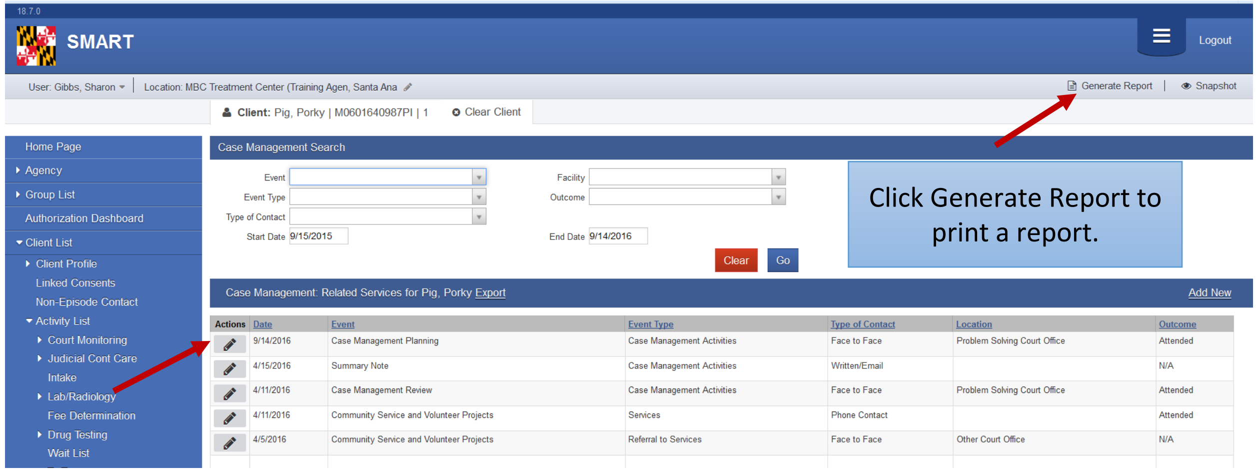
Case Management/ *Entering Case Management Activities*

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.

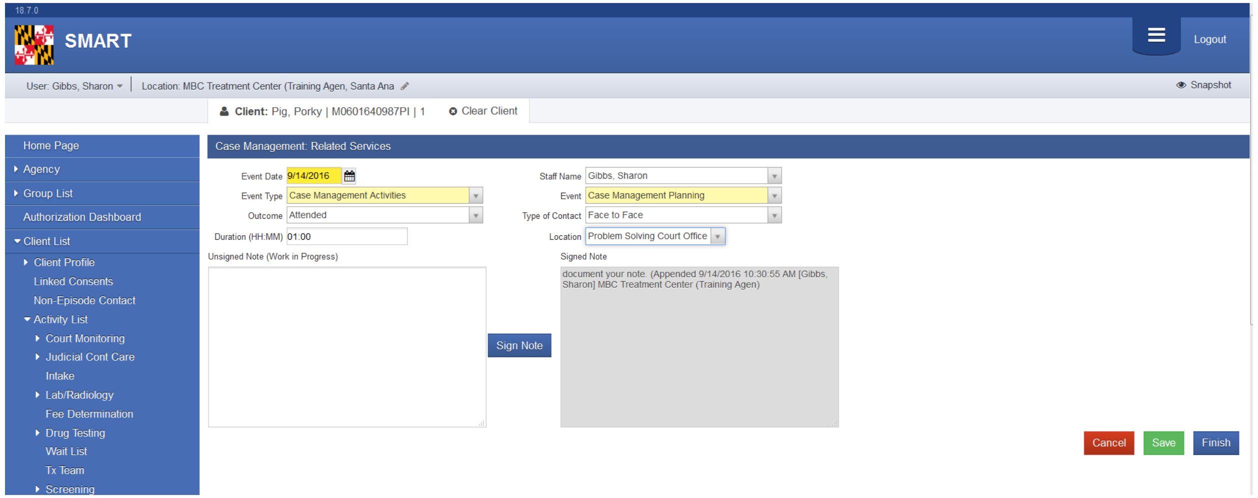
1. Entry Steps: Login, Select Facility (if applicable), Client List, Client Profile, Intake, Activity List, PS Court, Case Management.
2. Click **Add New** to make a case management entry.
3. Enter the **Event Date** (Note: This will automatically enable the Event Type field.)
4. Click on the drop down 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** again.
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**.



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



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.