
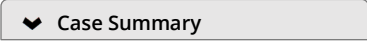







Quick Reference Guide: Case Closure

In order to close a Case, the assigned worker must address unapproved or rejected items. All of the items requiring attention will be listed in the *Current Notifications* pop-up.


Quick Overview:

1. Start the closure process by clicking on the Closure Validation Folder Icon [] above the  pane.
2. Make note of all items listed in the *Current Notifications* pop-up that must be resolved before closure can occur.
3. The following unresolved items may prevent closure:
 - a. **Case Plans** with a status of: *Draft, In Progress, or Rejected*.
[[Case Plan Job Aid](#)]
 - b. **Assessments** with a status of: *Draft, In Progress, or Rejected*.
[[Assessments: FAST Job Aid](#)]
 - c. **Contacts** with a status of: *Draft, In Progress, or Rejected*.
[[Contacts Job Aid](#)]
 - d. **Case Contact–Quick Entry** contact drafts that remain in the *Contacts Quick–Entry* pop-up.
[[Case Contact–Quick Entry Job Aid](#)]
4. Once all unresolved items have been completed, navigate to the Case Summary screen and close the Case.
 - a. In the  pane select selecting “Closed” from the *Case Status* drop-down and click . Note: If there are still unresolved items the *Current Notifications* pop-up will appear instead of the *Case Closure Details* pop-up.
 - b. Complete the *Case Closure Details* pop-up and click  to close the Case.

NOTE: If you are unable to resolve the items required for closure, contact your Application Specialist(s) for further assistance.

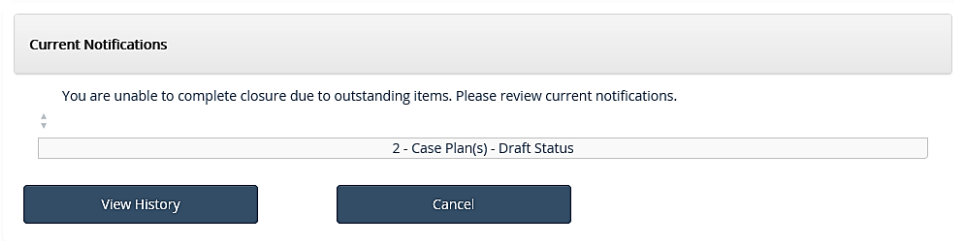


Preparing the Case for Closure

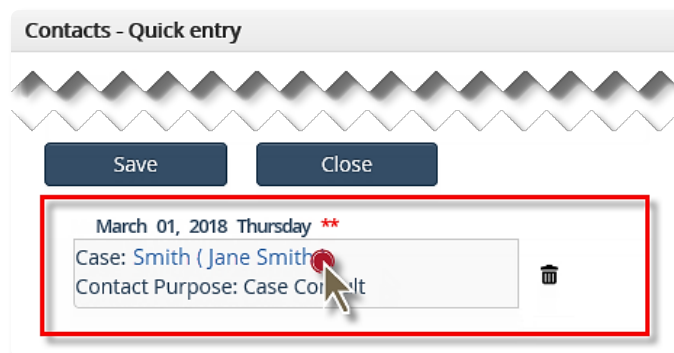
1. From the **Dashboard**: Locate the Case and click on the *Case ID* to bring the Case into focus.
2. Start the closure process by clicking on the Closure Validation Folder Icon [] above the **Case Summary** pane.



3. Make note of all items listed in the *Current Notifications* pop-up that must be resolved before closure can occur.



- a. Click **Cancel** to close the *Current Notifications* pop-up.
 - b. Clicking **View History** will display the *Override History* for this Case.
4. The following unresolved items may prevent closure:
 - a. **Case Plans** with a status of: *Draft, In Progress, or Rejected*.
[[Case Plan Job Aid](#)]
 - b. **Assessments** with a status of: *Draft, In Progress, or Rejected*.
[[Assessments: FAST Job Aid](#)]
 - c. **Contacts** with a status of: *Draft, In Progress, or Rejected*.
[[Contacts Job Aid](#)]
 - d. **Case Contact-Quick Entry** contact drafts that remain in the *Contacts Quick-Entry* pop-up.
[[Case Contact-Quick Entry Job Aid](#)]





Closing the Case

- Once all unresolved items have been completed, navigate to the Case Summary screen and close the Case.
- Navigation:
 - From the **Dashboard** :
Locate the desired Case and click on the *Case ID* to bring the Case into focus; the **Summary** tile will open automatically.
 - From within the Case:
Click on the **Case Information** tile. Then click on the **Summary** tile.
- In the **Case Summary** pane select selecting "Closed" from the *Case Status* drop-down and click **Save**. If there are still unresolved items the *Current Notifications* pop-up will appear instead of the *Case Closure Details* pop-up.
Reminder: The Case cannot be closed unless the *Home Visiting Status* is either "Closed" or "Not Interested".

Summary

*Denotes Required Fields ** Denotes Half Mandatory Fields Ctrl + Click to Multi-Select and Deselect


Provider * Facility *

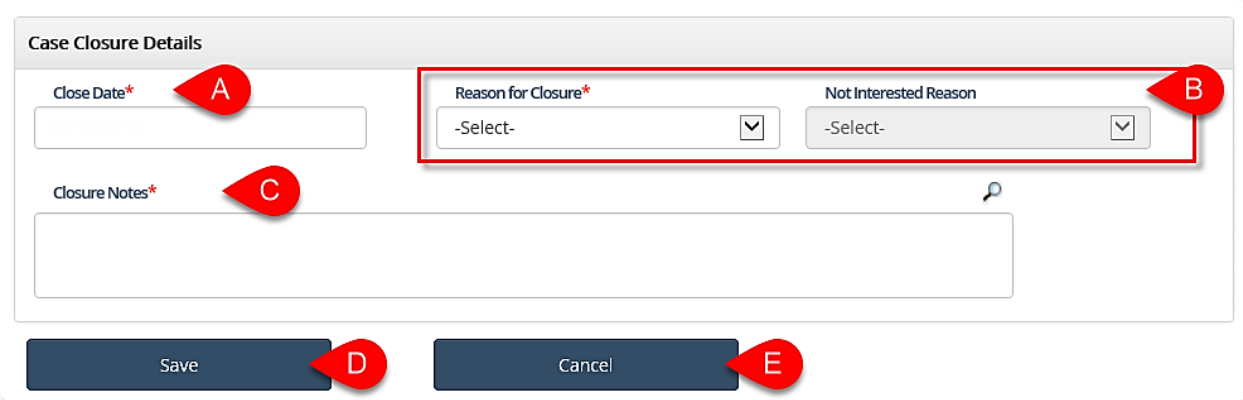
Case Name * Enrollment Status * Assigned Worker Home Visiting Status

Case ID Status Date * Assignment Date Home Visiting Date



Save Snapshot Report

NOTE: If you are unable to resolve the items required for closure, contact your Application Specialist(s) for further assistance.

4. Complete the *Case Closure Details* pop-up and click  to close the Case.



The image shows a 'Case Closure Details' pop-up form. It has a title bar at the top. Below the title bar, there are four main sections: 1. 'Close Date*' with a text input field and a red callout bubble 'A' pointing to it. 2. 'Reason for Closure*' with a dropdown menu showing '-Select-' and a red callout bubble 'B' pointing to it. 3. 'Not Interested Reason' with a dropdown menu showing '-Select-' and a red callout bubble 'B' pointing to it. 4. 'Closure Notes*' with a large text area and a red callout bubble 'C' pointing to it. At the bottom of the form, there are two buttons: 'Save' with a red callout bubble 'D' pointing to it, and 'Cancel' with a red callout bubble 'E' pointing to it.

- a. *Close Date*: This date defaults to today's date but can be edited if necessary.
- b. *Reason for Closure*: Select the *Reason for Closure* from the drop-down.
OR
Not Interested Reason: If the Case has not yet been accepted it can be closed with an *Enrollment Status* of "Not Interested". If the *Enrollment Status* is "Not Interested", select the *Not Interested Reason* from the drop-down.
- c. *Closure Notes*: Enter any relevant notes about the case closure.
- d. Clicking  will close the Case.
- e. Clicking  will close the *Case Closure Details* pop-up without closing the Case; information entered will not be saved.

NOTE: If the Home Visiting Status is being updated at the same time as the Enrollment Status, then the Home Visiting Closure Details will be included in the pop-up along with the Case Closure Details.

For more information...

For assistance, please contact the Allegheny County Service Desk at ServiceDesk@AlleghenyCounty.US or call 412-350-HELP (4357). Select Option 2 for the DHS Service Desk.

To access iService, go to: <https://servicedesk.alleghenycounty.us>

This and other Job Aids can be found at: <http://s3.amazonaws.com/dhs-application-support/index.htm>