DEPARTMENT OF HUMAN SERVICES
ALLEGHENY COUNTY, PENNSYLVANIA

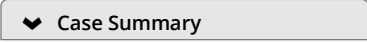Homeless
Services
& Supports

HOMELESS CASE MANAGEMENT

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 [❯ Case Summary] 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]

    a. **Assessments** with a status of: *Draft*, *In Progress*, or *Rejected*.
       [Assessments: FAST Job Aid]

    b. **Contacts** with a status of: *Draft*, *In Progress*, or *Rejected*.
    b. [Case Contacts Job Aid]

    c. **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 [❯ Case Summary] pane select selecting "Closed" from the *Case Status* drop-down and click [Save]. 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 [Save] to close the Case.

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

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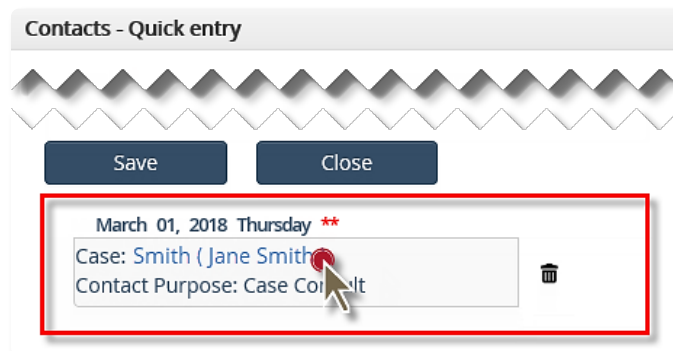
Preparing the Case for Closure

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.
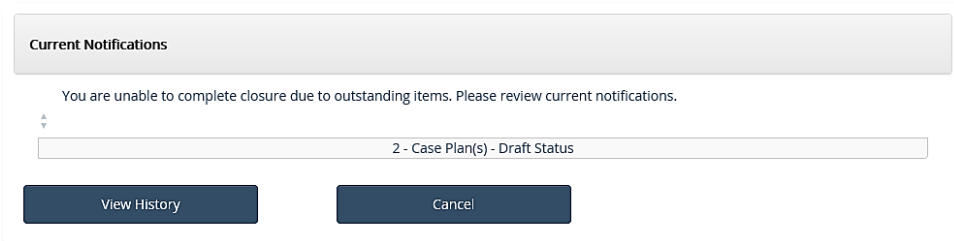
   a. Click [Cancel] to close the *Current Notifications* pop-up.
   b. Clicking [View History] will display the *Overrride History* for this Case.

4. The following unresolved items may prevent closure:
   a. **Case Plans** with a status of: *Draft*, *In Progress*, or *Rejected*.
      [Case Plan Job Aid]
   a. **Assessments** with a status of: *Draft*, *In Progress*, or *Rejected*.
      [Assessments: FAST Job Aid]
   b. **Contacts** with a status of: *Draft*, *In Progress*, or *Rejected*.
      [Case Contacts Job Aid]
   b. **Case Contact–Quick Entry** contact drafts that remain in the *Contacts Quick–Entry* pop-up.
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Closing the Case

1. Once all unresolved items have been completed, navigate to the **Summary** screen and close the Case.

2. Navigation:
   a. 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.
   b. From within the Case:
      Click on the **⌄ Case Information** tile. Then click on the **Summary ›** tile.

3. In the **⌄ Case Summary** pane select selecting "Closed" from the *Case Status* drop-down and click **Save**. Note: If there are still unresolved items the *Current Notifications* pop-up will appear instead of the *Case Closure Details* pop-up.

Case Summary

*Denotes Required Fields   **Denotes Half Mandatory Fields   *Ctrl + Click to Multi-Select and Deselect*
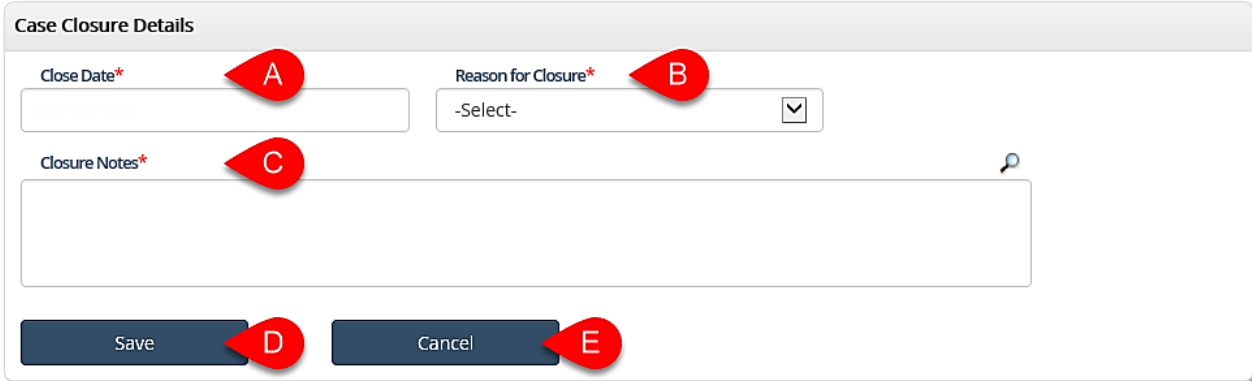
Program: Homeless Case Management

Case ID	Case Name *	Case Status *	Case Open Date	Assignment Category	Assigned Worker
		Open		-Select-	-Select-

Phone Number	Address		Monthly Income	Last Contact Date

Case Plan Date	Next Case Plan Date

Save   Consumer Summary

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

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

Case Closure Details

Close Date*   Ⓐ

Reason for Closure*   Ⓑ

-Select-

Closure Notes*   Ⓒ

[Save] Ⓓ   [Cancel] Ⓔ

    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.

    c. *Closure Notes*: Enter any relevant notes about the case closure.

    d. Clicking [Save] will close the Case.

    e. Clicking [Cancel] will close the *Case Closure Details* pop-up without closing the Case; information entered will not be saved.

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