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]

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

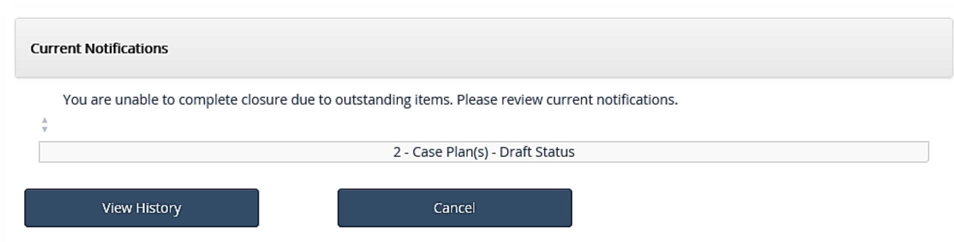
NOTE: *If you are unable to resolve the items required for closure, contact your Application Specialist(s) for further assistance.*

Preparing the Case for Closure

1. From the **Dashboard**: Locate the Case and click on the *Case ID* to bring the Case into focus.

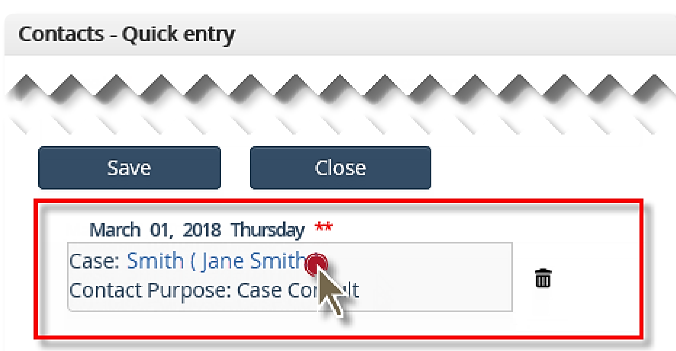
2. Start the closure process by clicking on the Closure Validation Folder Icon **[** **]** above the **Case Summary** pane.

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



Closing the Case

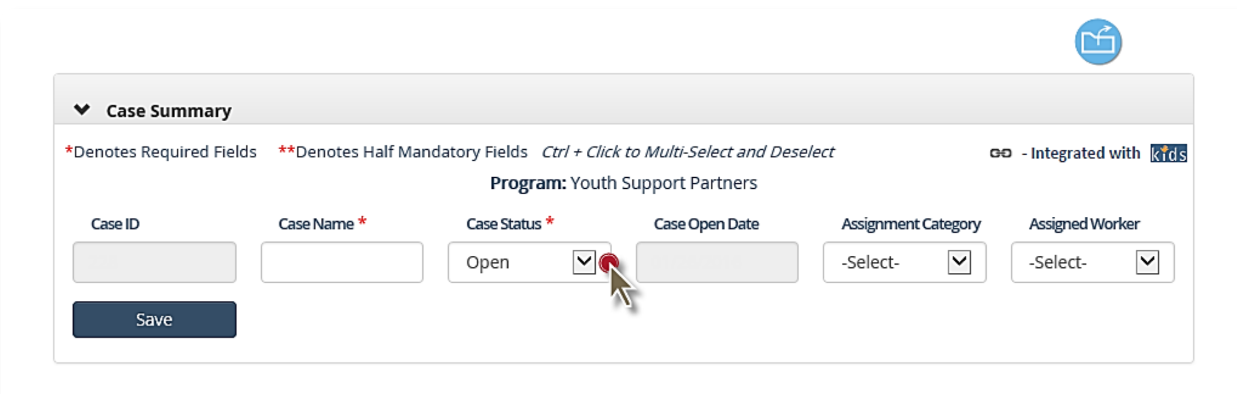
1. Once all unresolved items have been completed, navigate to the **Summary** screen and close the Case.

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.

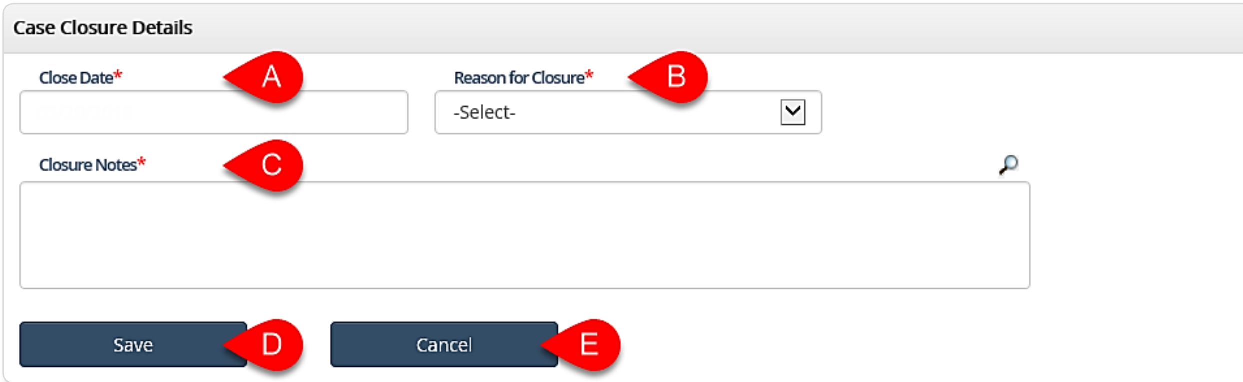
   b. From within the Case:
   Click on the ⌄ Case Information tile. Then click on the Summary › tile.

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.



***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 **Save** to close the Case.



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