
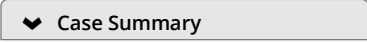
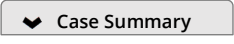






Quick Reference Guide: Case Closure


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. **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  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.

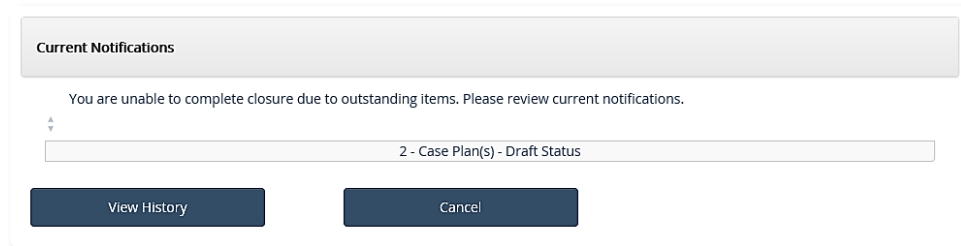
NOTE: If you are unable to resolve the items required for closure, contact your Application Specialist(s) for further assistance.

Preparing the Case for Closure

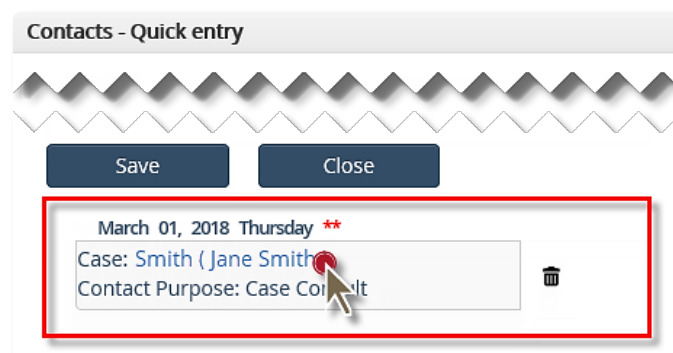
1. From the **Dashboard**: Locate the Case and click on the *Case ID* to bring the Case into focus.
2. Start the closure process by clicking on the Closure Validation Folder Icon [] above the **Case Summary** pane.



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

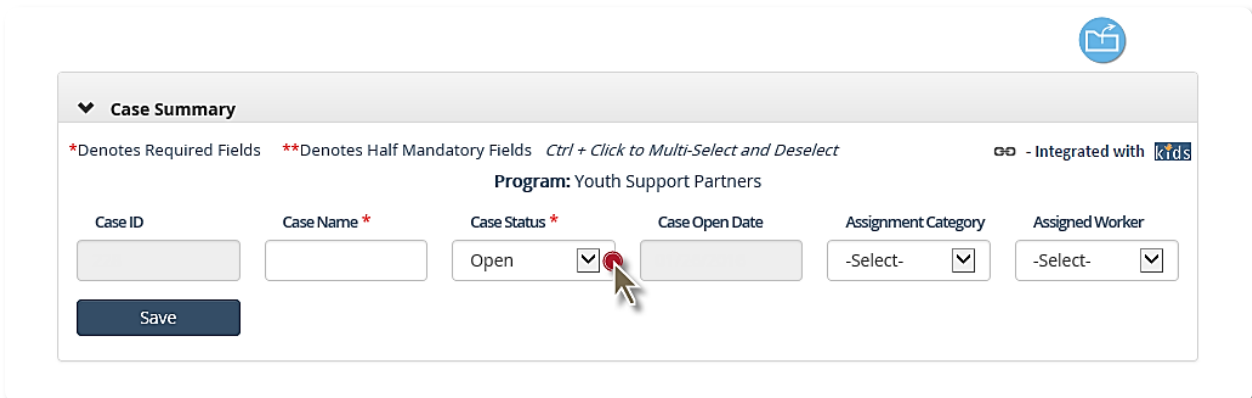


- a. Click **Cancel** to close the *Current Notifications* pop-up.
 - b. Clicking **View History** will display the *Override History* for this Case.
4. The following unresolved items may prevent closure:
 - a. **Case Plans** with a status of: *Draft, In Progress, or Rejected* [[Case Plan Job Aid](#)]
 - b. **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


- Once all unresolved items have been completed, navigate to the **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**. Note: If there are still unresolved items the *Current Notifications* pop-up will appear instead of the *Case Closure Details* pop-up.

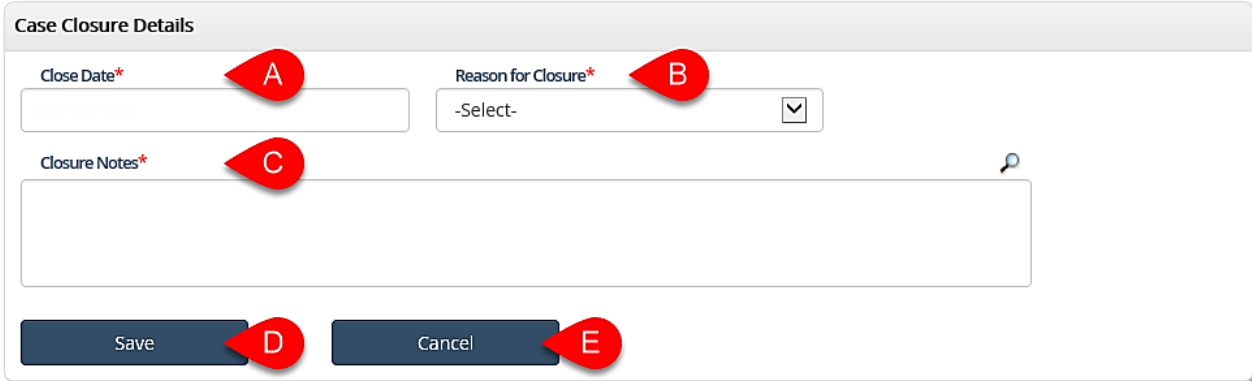


The screenshot shows the 'Case Summary' form. At the top, there is a header with a dropdown arrow and the text 'Case Summary'. Below this, there are instructions: '*Denotes Required Fields', '**Denotes Half Mandatory Fields', and 'Ctrl + Click to Multi-Select and Deselect'. To the right, it says 'Integrated with kids'. The form fields are: 'Case ID' (text input), 'Case Name *' (text input), 'Case Status *' (dropdown menu with 'Open' selected), 'Case Open Date' (text input), 'Assignment Category' (dropdown menu with '-Select-' selected), and 'Assigned Worker' (dropdown menu with '-Select-' selected). A 'Save' button is at the bottom left. A red arrow points to the 'Case Status' dropdown menu.



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 three main sections: 'Close Date*' with a text input field (labeled A), 'Reason for Closure*' with a dropdown menu (labeled B), and 'Closure Notes*' with a large text area (labeled C). At the bottom of the form, there are two buttons: 'Save' (labeled D) and 'Cancel' (labeled E). A magnifying glass icon is located to the right of the 'Closure Notes' text area.

- Close Date*: This date defaults to today's date but can be edited if necessary.
- Reason for Closure*: Select the *Reason for Closure* from the drop-down.
- Closure Notes*: Enter any relevant notes about the case closure.
- Clicking  will close the Case.
- Clicking  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>