



Ohio SACWIS Project
CM23 Create Supervisory Case
Conference Notes (UC321)
Version 1.4

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Revision Log

Version	Date	A/D/C (Add, Delete, Change)	Author	Document Section #	Description
1.0	08/12/2004		M. Stubbs		Initial version
1.1	08/14/2004	A/D/C	M. Stubbs	All	Amended version
1.2	8/16/04	A/D/C	T. Bendert	All	Revisions after U session
1.3	9/20/2004		C. Roy		Revision
1.4	10/15/2004		C. Roy		Revision prior to RRD
					RRD Session

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1 Description

This is a CRUD (Create, Read, Update, Delete) use case regarding the creation of supervisory case conference notes.

This use case describes the steps for recording Supervisory Case Conference Notes clearly related to worker's assignment and case management of a case. The Supervisory Case Conference Notes page will provide Supervisors the ability to record notes and comments specific to a case and/or worker. Although the worker(s) will not be able to access the Supervisory Case Conference Notes page, the system will generate a task list. (Case Management Supervisory only, this is not intended to be an HR/Personnel issue depository.)

2 Characteristic Information



Name	CM23 Create Supervisory Case Conference Notes (UC321)
Scope	 Business – Case Management
Level	 - Primary Task
Actor(s)	Supervisor
Stakeholders and Interests	<ol style="list-style-type: none"> 1. Worker 2. County Agencies 3. Private Agencies 4. IV-E Agencies 5. ODJFS
Pre-conditions	A worker and client/case record exists in SACWIS.
Post-conditions	Various notes and comments are documented and a task list is generated.
Trigger(s)	A Supervisor needs to document information specific to a worker and/or client(s) and case.
Requirements Addressed	RFP32

Figure 1 – Characteristic Information

3 Basic Flow

3.1 Usage Examples and Narratives

- Scenario 1: Supervisor creates a Supervisory Case Conference Note.
- Scenario 2: Supervisor views/updates existing Supervisory Case Conference Note(s).
- Scenario 3: Supervisor deletes a Supervisory Case Conference Note.

3.2 Main Success Scenarios

Scenario 1: Create Supervisory Case Conference Notes

1. The supervisor accesses the Supervisory Case Conference Notes page.
2. The supervisor enters Case search criteria and selects search command. *(MSS)*
3. The system retrieves results matching search criteria.
4. The supervisor enters worker search criteria and selects search command. *(MSS)*
5. The system retrieves results matching search criteria.
6. The supervisor records date of supervisory case conference. *(MSS)*
7. The supervisor selects category value 'Supervisory Case Conference'. *(MSS)*
8. The supervisor selects category type e.g. 'Worker/Supervisor Meeting', 'Case Plan'. *(MSS)*
9. The supervisor identifies Case Participant(s) to which the Case Conference Note applies. *(MSS)*
10. The supervisor records narrative information
11. The supervisor records task list information. CM 50 Create Supervisory Case Conference Task List (UC)
12. The supervisor requests the system to save Supervisor Case Conference Note information.

Scenario 2: View/Update Supervisory Case Conference Notes

1. The supervisor access Supervisory Case Conference log page of the system.
2. The supervisor enters search/sorting criteria and selects search command.
3. The system retrieves results matching search criteria.
4. The supervisor views log of all Case Conference Notes retrieved from search.
5. The supervisor optionally views details of each Case Conference Note and optionally prints one or all notes.

Scenario 3: Delete Supervisory Case Conference Notes

1. The supervisor accesses the Supervisory Case Conference Log page of the system.
2. The supervisor selects the case conference note he/she wishes to delete.
3. The delete button is disabled and the supervisor is unable to delete the case conference note.

Important and Required Fields

MSS or AF Step	Fields
MSS 1 Step 2	Last Name First Name Case ID Zip Code County Sound Like Archive Date Restricted Participant View Sort By – Alpha, Case Number, Status
MSS 1 Step 4	Last Name First Name Worker ID County Site/Department
MSS 1 Step 6	Date Time
MSS 1 Step 7	Supervisory Case Conference Note (category from pick list)
MSS 1 Step 8	<u>Category Type pick list</u> <ul style="list-style-type: none"> • Adoption • Safety Assessment • Case Plan • Case Review • Case Transfer • Case Assignment • Reunification Assessment • Court • Supplemental/Concurrent • Staffing Internal • Staffing External • Family Assessment • Emergency Meeting • Investigation • Ongoing Services • Semi-Annual Review • Placement Services • Safety Plan • Supervisor/Worker Meeting • Independent Living Services – Pre-emancipation • Independent Living Services – Post-emancipation

	<ul style="list-style-type: none"> • Other
MSS 1 Step 9	Last Name First Name

Figure 2 - Important Fields

4 Special Requirements

1. Business Rule: The supervisory case conference notes cannot be deleted and will be locked after saving.

5 Notes, Background Information, User Interface Ideas

Requirements allocated to this common use case	
RFP32	The system must have capacity for Supervisory Case Conference Notes to workers.
New Requirement	<i>8/16/04 case mgmt team:</i> The system must produce a task list of supervisory case notes based on tasks assigned to the worker by the supervisor.
New Requirement	<i>8/16/04 case mgmt team:</i> The system shall create a task list notification for supervisory case conference notes by multiple families/cases per task list per worker with the ability to prioritize by task with dates of tasks.

Requirements Table

The following figure illustrates how Case Notes were generated and displayed in the Wisconsin SACWIS system. The screen shots do not represent the design of the Ohio SACWIS system. The Case Notes pages were consistent in design within the WiSACWIS system, but values and participant information was specific to the type of case note selected. In Ohio SACWIS, the same methodology could be used with Supervisory Case Conference Notes having a higher level of security. Only Supervisor and designated personnel should be able to view and create Supervisory Case Conference Notes. For all other users, access to create or view the Supervisory Case Conference Notes will be disabled.

Example A

EXAMPLE SCREEN SHOT

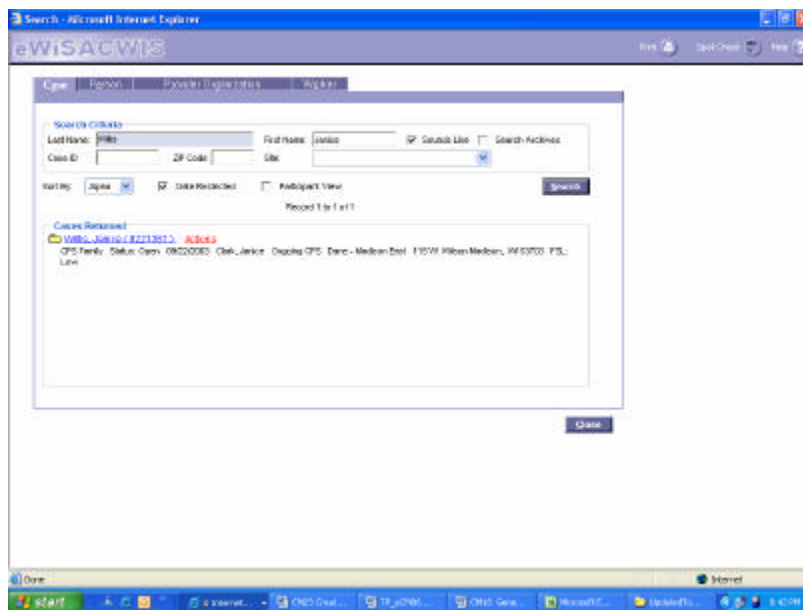


Figure 3 – Search Page

Example B

EXAMPLE SCREEN SHOT

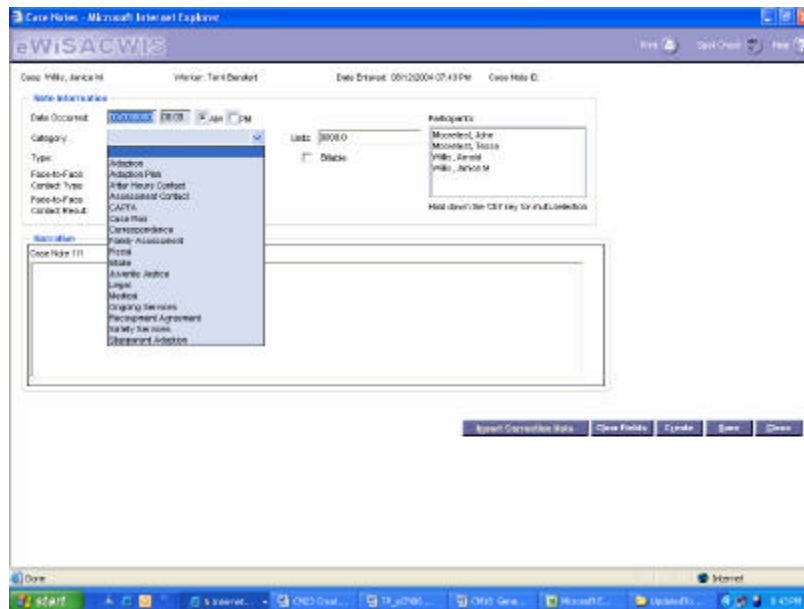


Figure 4 – Case Note Page

Example C

EXAMPLE SCREEN SHOT

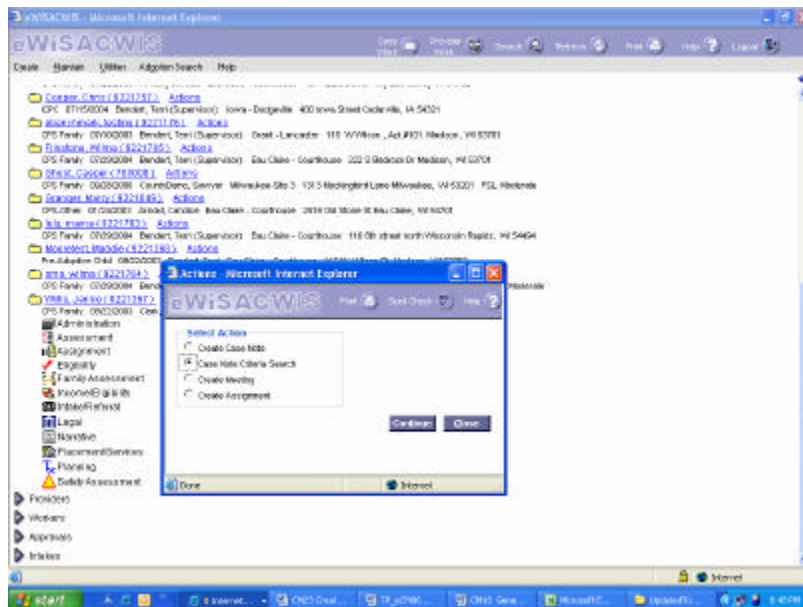


Figure 5 – View Case Note Criteria Search Page

Example D EXAMPLE SCREEN SHOT

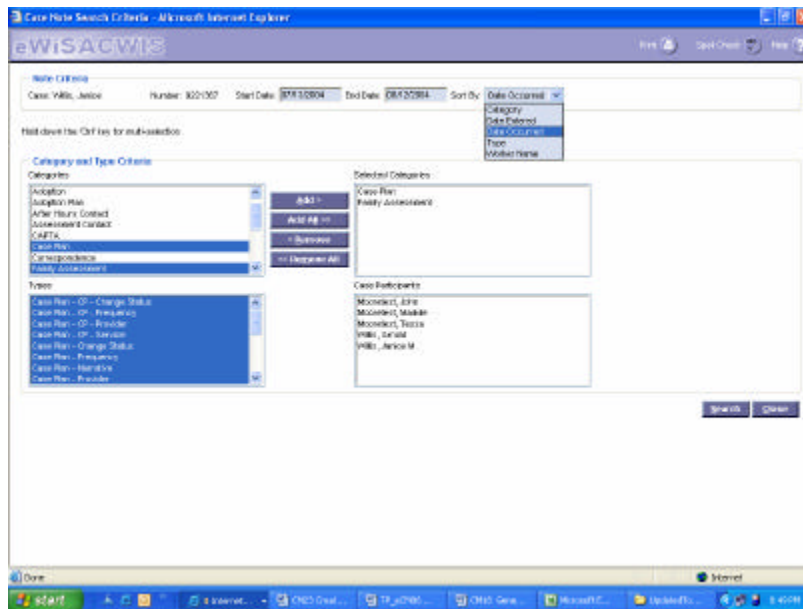


Figure 6 – Case Note Criteria Search Page

Example E

EXAMPLE SCREEN SHOT

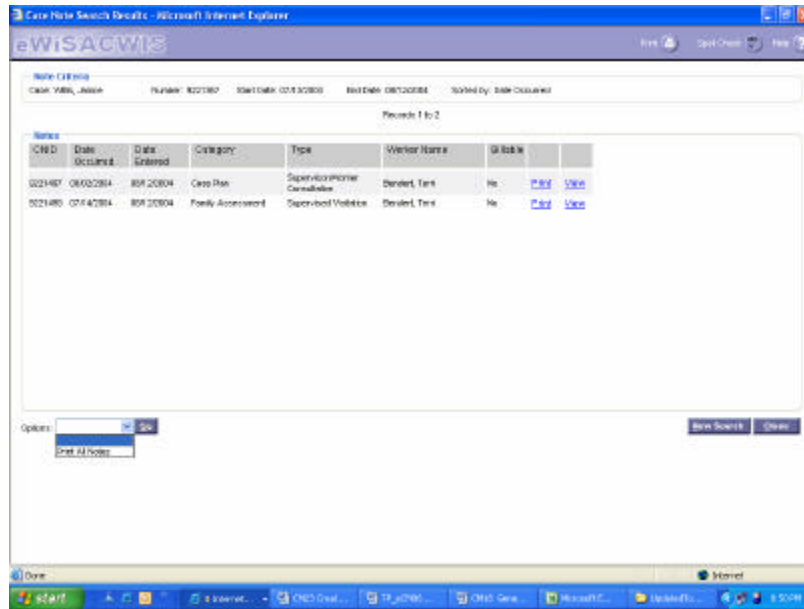


Figure 7 – Case Note Search Results Page