

Managing Case Services



Knowledge Base Article

Ohio

Department of
Job and Family Services

Managing Case Services

This Knowledge Base Article presents new SACWIS system features for managing the various aspects of case services.

Table of Contents

Viewing Case Service Information	3
Viewing Current or Historical Case Services	4
Viewing the Case Member / Caregiver History	5
Adding a New Case Service	7
Adding Participation Frequency	9
Linking a Provider	11
Unlinking a Provider	16
Adding Service Goals	17
Applying Information to Other Case Members	18
Editing Individual Status Records	19
Adding a New Case Member Service Status	20
Adding a New Caregiver Service	22
Marking a Status Record as Created in Error	24
End-Dating a Case Service	26
End-Dating a Case Service Member Status Record	27
Completing a Service Review	29
Adding a Service Activity Record	32
Filtering Service Activity Records	35
Linking a Case Service to a Work Item	36
Case Closure	39
Case Services with a Status of Planned	39

Managing Case Services

Viewing Case Service Information

To view case service information, complete the following steps:

1. From the SACWIS **Home** screen, click the **Case** tab.
2. Click the **Workload** tab.
3. Select the appropriate **Case ID** link.

Note: If you know the **Case ID** number, you can also use the **Search** link at the top of the **Home** screen and navigate to the **Case Overview** screen.

4. On the **Case Overview** screen, click the **Case Services** link in the light-blue **Navigation** menu on the left.

The screenshot displays the SACWIS Case Overview interface. At the top, a navigation bar includes tabs for Home, Intake, Case, Provider, Financial, and Administration. The 'Case' tab is selected and circled in red. Below it, sub-tabs for Workload, Court Calendar, and Placement Requests are visible, with 'Workload' also circled in red. On the left, a light-blue navigation menu lists various case-related links, with 'Case Services' circled in red. The main content area shows case details: Case ID, Case Name, Case Status (Open (05/12/2011)), and Case Category (Adoption). It includes sections for Case Actions (View Member Details, Access Original Case), Case Ticklers (a list of red and green icons), and Case Assignment Information (a table with columns for Worker Name, Role, and Agency of Worker). Links for View Case Status History and View Assignment History are also present.

The **Case Services Filter Criteria** screen appears displaying the **Case Services** section beneath it.

Managing Case Services

Viewing Current or Historical Case Services

As shown below, the screen defaults with the **Current Case Episode** radio button selected and the **Case Services** section displaying all **current** case services.

Case Services Filter Criteria

From Effective Date: To Effective Date:

Case Member: Status:

Service Category: Service Type:

Service Goal: Service:

Sort Results By: Current Case Episode View Historical

Filter **Clear Form**

Case Services

Service: **Add Case Services**

Result(s) 1 to 15 of 25 Page 1 of 2

	Case Member Name (s)	Service Category / Type	Service Classification	Effective Dates	
edit			Case Member	07/09/2010 -	delete service end
Case Member / Caregiver History					
edit			Case Member	07/09/2010 -	delete service end
Case Member / Caregiver History					

To view **all case services** created during any open case episode (current and past), complete the following steps:

1. Click the **View Historical** radio button
2. Click the **Filter** button.

Service Goal: Service:

Sort Results By: Current Case Episode View Historical

Filter **Clear Form**

Case Services

Service: **Add Case Services**

Result(s) 1 to 15 of 34 Page 1 of 3

	Case Member Name (s)	Service Category / Type	Service Classification	Effective Dates	
edit			Case Member	07/09/2010 -	delete service end
Case Member / Caregiver History					
edit			Case Member	07/09/2010 -	delete service end

The **Case Services** section displays **all services** from the current and previous open case episodes.

Managing Case Services

Viewing the Case Member / Caregiver History

The **Case Services** section can display a history of the service(s) linked to a case member, along with the current status of those services.

Specifically, when expanded the **Case Member / Caregiver History** link displays the following information:

- All Case Members and Caregivers (if caregivers are applicable)
- Current Case Service Status
- Provider Name
- Service Description
- Status Begin Date / End Date

To view the history, complete the following steps:

1. In the **Case Services** section, locate the appropriate case service.
2. Click the **Case Member / Caregiver History** link to expand the case member's service status record.

The screenshot shows a web interface for managing case services. On the left is a sidebar with navigation links: Justification/Waiver, **Case Services** (circled in red), Court, Initial Removal, Placement Request, Placement, Visitation Plans, Independent Living, Case Plan, Case Review/SAR, Safety Reassessment, and Reunification Assessment. The main content area is titled 'Case Services' and includes a 'Service:' dropdown, an 'Add Case Services' button, and a table of results. The table has columns for Case Member Name (s), Service Category / Type, Service Classification, Effective Dates, and actions (delete, service_end). Two rows are visible: one for 'Smith, John' and one for 'Jones, Bea'. Below the table, there are expandable sections for 'Case Member / Caregiver History' (circled in red) for each member. The page is labeled 'Page 1 of 2'.

Case Member Name (s)	Service Category / Type	Service Classification	Effective Dates	Actions
edit Smith, John	Case Management/Mentoring Services	Case Member	07/09/2010 -	delete service_end
Case Member / Caregiver History				
edit Jones, Bea	Case Management/Case Planning	Case Member	07/09/2010 -	delete service_end
Case Member / Caregiver History				

Managing Case Services

Example Expanded Showing One Case Member:

Case Services

Service: [Add Case Services](#)

Result(s) 1 to 15 of 25 Page 1 of 2

	Case Member Name (s)	Service Category / Type	Service Classification	Effective Dates	
edit	Smith, John	Case Management/Mentoring Services	Case Member	07/09/2010 -	delete service_end

Case Member / Caregiver History

	Case Member	Status	Provider	Service Description	Status Begin Date/End Date
	Smith, John 06/01/2003	PROVIDED			07/09/2010 -

Example Expanded Showing Multiple Case Members:

Smith, John; Smith, Mary; Smith, Tim; Smith, Jane

[edit](#) Counseling/Individual counseling Case Member 07/09/2010 - [delete](#)
[service_end](#)

Case Member / Caregiver History

	Case Member	Status	Provider	Service Description	Status Begin Date/End Date
authorize	Smith, John;	SCHEDULED			07/09/2010 -
authorize	Smith, Mary;	SCHEDULED			07/09/2010 -
authorize	Smith, Tim;	SCHEDULED			07/09/2010 -
authorize	Smith, Jane	SCHEDULED			07/09/2010 - 08/15/2010

- To close the history, click the **Case Member / Caregiver History** link again.

Managing Case Services

Adding a New Case Service

Complete the following steps to add a new case service for a case member:

1. Navigate to the **Case Services** section.
2. In the **Service** field, select **Case Member** from the drop-down list.

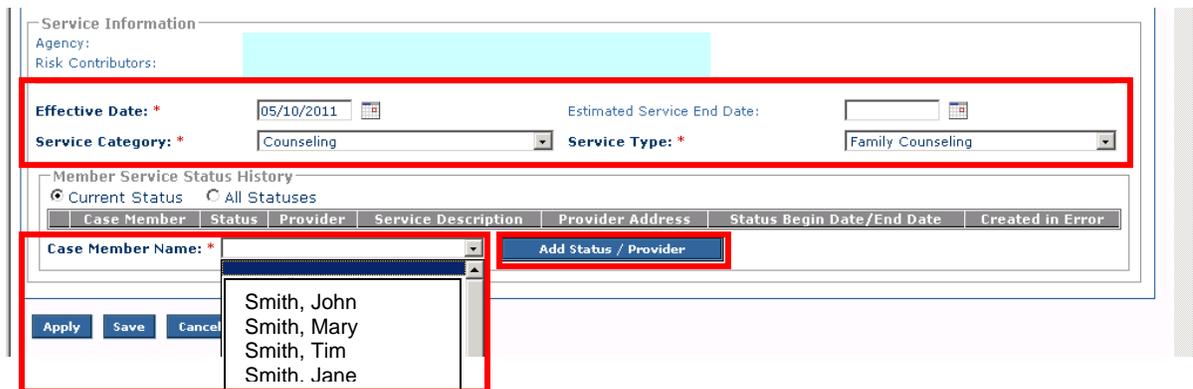
Important: You should only select **Caregiver** when one of the children is in placement. **To add a caregiver service, see Adding a New Caregiver Service** sub-section later in this Knowledge Base Article.

3. Click the **Add Case Services** button.



The **Service Information** screen appears.

4. In the **Effective Date** field, enter the appropriate date.
5. In the **Service Category** field, select the appropriate category from the drop-down list.
6. In the **Service Type** field, select the appropriate type from the drop-down list.
7. In the **Case Member Name** field, select the appropriate name from the drop-down list.
8. Click the **Add Status / Provider** button.



The **Status Details** screen appears.

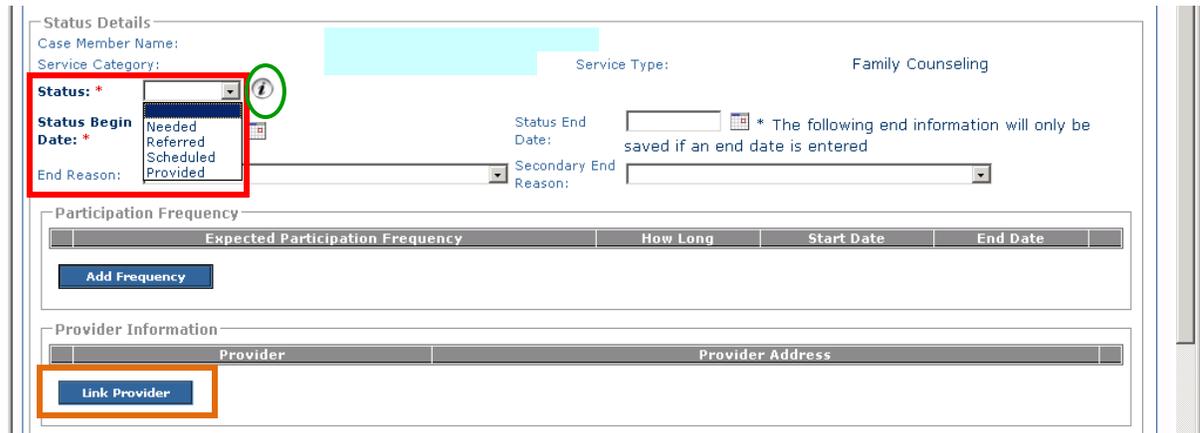
Managing Case Services

9. In the **Status** field, select the appropriate status from the drop-down list.

10. Select a date in the **Status Begin Date** field.

Important:

- The **Link Provider** button (shown in orange) will only be available (enabled) if the status types of **Referred**, **Scheduled**, **Provided** are selected.
- If you hover over the  icon (circled in green), the system displays definitions of the four status terms as shown below.



Status Details
Case Member Name: [Redacted]
Service Category: [Redacted] Service Type: Family Counseling

Status: * [Dropdown menu open with options: Needed, Referred, Scheduled, Provided] 

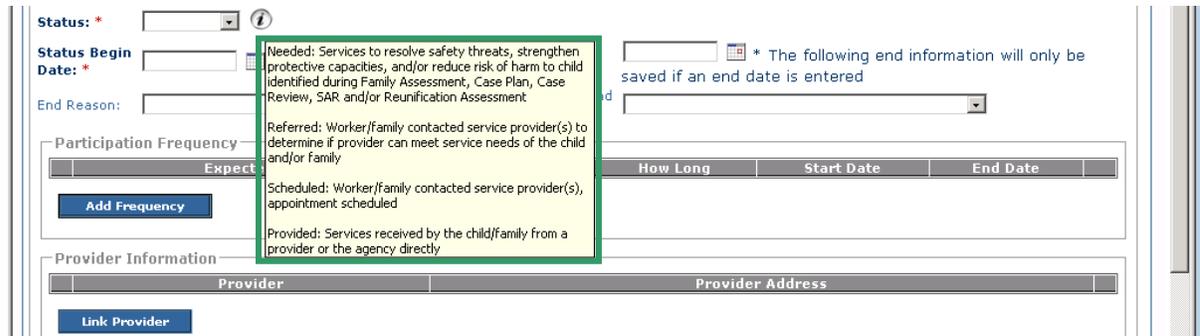
Status Begin Date: * [Date field]
End Reason: [Dropdown menu] Status End Date: [Date field] * The following end information will only be saved if an end date is entered
Secondary End Reason: [Dropdown menu]

Participation Frequency

Expected Participation Frequency	How Long	Start Date	End Date
Add Frequency			

Provider Information

Provider	Provider Address
Link Provider	



Status: * [Dropdown menu] 

Status Begin Date: * [Date field]
End Reason: [Dropdown menu] Status End Date: [Date field] * The following end information will only be saved if an end date is entered
Secondary End Reason: [Dropdown menu]

Participation Frequency

Expect	How Long	Start Date	End Date
Add Frequency			

Provider Information

Provider	Provider Address
Link Provider	

Needed: Services to resolve safety threats, strengthen protective capacities, and/or reduce risk of harm to child identified during Family Assessment, Case Plan, Case Review, SAR, and/or Reunification Assessment

Referred: Worker/family contacted service provider(s) to determine if provider can meet service needs of the child and/or family

Scheduled: Worker/family contacted service provider(s), appointment scheduled

Provided: Services received by the child/family from a provider or the agency directly

Status Term Definitions for Icon

Needed: Services to resolve safety threats, strengthen protective capacities, and/or reduce risk of harm to child identified during Family Assessment, Case Plan, Case Review, SAR, and/or Reunification Assessment

Referred: Worker/family contacted service provider(s) to determine if provider can meet service needs of the child and/or family

Scheduled: Worker/family contacted service provider(s) appointment scheduled

Provided: Services received by the child/family from a provider or the agency directly

Managing Case Services

Adding Participation Frequency

To add a case member's participation frequency, complete the following steps:

1. If applicable, click the **Add Frequency** button on the **Status Details** screen.

The screenshot shows the 'Status Details' form. The 'Status' is set to 'Provided'. The 'Status Begin Date' is 05/10/2011. The 'Service Type' is 'Family Counseling'. Below the status information is a table for 'Participation Frequency' with columns for 'Expected Participation Frequency', 'How Long', 'Start Date', and 'End Date'. A red box highlights the 'Add Frequency' button. Below the table is the 'Provider Information' section with a 'Link Provider' button.

The **Expected Frequency** screen appears.

2. In the **Expected Participation Frequency** field, enter the frequency into the **two** fields. In the second field, you will make a selection from the drop-down list.
3. In the **Start Date** field, enter the appropriate date.

The screenshot shows the 'Expected Frequency' form. The 'Expected Participation Frequency' field has '1 time' in the text box and 'Weekly' in the drop-down list. The 'Start Date' field is 05/05/2011. A green circle highlights the information icon next to the start date. A green box contains the message: 'The Expected Frequency Start Date should be the date of the first scheduled appointment.' There are 'OK' and 'Cancel' buttons at the bottom.

Note:

- The frequency participation date cannot be before the start date of the status record for a case member.
- If you hover over the  icon (circled in green), the **Start Date** definition appears with a message saying: The **Expected Frequency Start Date** should be the date of the first schedule appointment.
- If **One Time** is selected from the **Expected Participation Frequency** field drop-down list, the text box (to its left) is not available (disabled). If any other value is selected from the drop-down list, the text box must be populated. The text box accepts both alpha and numeric content.

Managing Case Services

4. If needed, complete the **Expected Duration** field.

Important:

- If needed, you can return to this screen and enter the **Expected Duration** date at a later time.
- The **Expected Duration** field's values are **Days, Weeks, Months, and Years**.
- The **Expected Duration** field can be future dated, but it must be on or after the **Expected Participation Frequency Start** date.

5. When complete, click the **OK** button.

Expected Frequency
Case Member Name: [redacted]
Expected Participation Frequency: * 1 time Weekly
Start Date: * 05/12/2011
DOB: [redacted]
Expected Duration: 6 Months
End Date: [redacted]
OK Cancel

The **Status Details** screen appears displaying the new content in the **Participation Frequency** section as shown below.

As shown in green below:

6. To edit this record, click the **Edit** link on the left. After editing the record, click the **OK** button again.
7. To delete this record, click the **Delete** link on the right. Then, click the **OK** button.
8. To add another frequency record, click the **Add Frequency** button again.

Status Details
Case Member Name: [redacted]
Service Category: Counseling Service Type: Family Counseling
Status: * Provided
Status Begin Date: * 05/10/2011
Status End Date: * [redacted] * The following end information will only be saved if an end date is entered
Secondary End Reason: [redacted]
End Reason: [redacted]
Participation Frequency
edit time WEEKLY 6 MONTHS 05/12/2011 delete
Add Frequency

Managing Case Services

Linking a Provider

Linking a provider is **required** for the statuses of **Referred**, **Scheduled**, and **Provided** in order to save the record. To do so, complete the following steps:

1. On the **Status Details** screen in the **Provider Information** section, click the **Link Provider** button.

Important:

- The **Link Provider** button will only be available (enabled) when the status types of **Referred**, **Scheduled**, and **Provided** are selected in the **Status** field.
- For a **Referred** status, multiple providers can be linked. Refer to steps at the end of this sub-section to do so.

The screenshot shows the 'Status Details' form. At the top, 'Case Member Name' is redacted with a blue bar. 'Service Category' is 'Counseling' and 'Service Type' is 'Family Counseling'. The 'Status' dropdown is set to 'Provided'. 'Status Begin Date' is '05/10/2011'. 'Status End Date' is empty, with a note: '* The following end information will only be saved if an end date is entered'. 'End Reason' and 'Secondary End Reason' are empty dropdowns. Below is the 'Participation Frequency' table:

	Expected Participation Frequency	How Long	Start Date	End Date	
edit	1 time WEEKLY	6 MONTHS	05/12/2011		delete

An 'Add Frequency' button is below the table. The 'Provider Information' section has two columns: 'Provider' and 'Provider Address'. A 'Link Provider' button is located at the bottom of the 'Provider' column and is circled in red.

The **Provider Match Search Criteria** screen appears displaying the **Provider Information** section. Many fields are already pre-populated with data as shown below.

Managing Case Services

Important:

- In the **Provider Information** section, **unless you know that your agency is the recommending agency**, you will need to remove the default information from both the **Agency Type** field and **Agency Provider** field (shown in green).
- If you know the **Provider ID** number, you can click the **Additional Search Criteria** link (shown in orange) and search by the Provider ID.
- As agencies complete Non-ODJFS merges within SACWIS, the recommending agency for most provider types will switch to ODJFS. As a result, most Non-ODJFS providers will eventually appear showing ODJFS as the recommending agency.

2. Click the **Search** button.

Provider Match Search Criteria

Provider Information

Service Category: * Counseling Search Date: 05/10/2011

Service Type: * Family Counseling

Agency Type: Public Agency:

By Available Capacity

Available Counties: Adams, Allen, Ashland, Ashtabula, Athens

Selected and Nearby Counties:

OR School District:

[Additional Search Criteria](#)

Child Information

Gender: From Age: To Age: Language:

[Additional Search Criteria](#)

Sort Results By:

Search Clear Form Cancel

The **Provider Match Search Results** appears at the bottom of the screen.

Managing Case Services

3. To select a provider, click the **Select** link in the appropriate row.

Important:

- The list that appears in the **Agency** column of the **Provider Match Search Results** list (shown in green) refers to the agency that has entered the service on the provider. Be sure to select the service (shown in the **Services** column) that corresponds to your agency.
- If your agency has not yet entered a service for this provider, please contact your Services Administrator and have them set up the service you are trying to use.
- In order to save the record, the provider must have an **active service** as of the begin date and **active status** as of current system date.

Sort Results By:

[Search](#) [Clear Form](#) [Cancel](#)

Provider Match Search Results
Result(s) 1 - 15 of 36 Page 1 of 3

		Provider Name / ID	Provider Category	Provider Status	Current Primary Address	Current Vacancies	Services	Agency
select	view		NONODJFS	ACTIVE				
select	view		NONODJFS	ACTIVE				
select	view		NONODJFS	ACTIVE				

The **Status Details** screen appears displaying the **Provider Information** section now populated with information as shown below.

Managing Case Services

Status Details

Case Member Name: [REDACTED] Service Type: Family Counseling

Service Category: [REDACTED]

Status: * ⓘ

Status Begin Date: * ⓘ

Status End Date: ⓘ * The following end information will only be saved if an end date is entered

End Reason: ⓘ Secondary End Reason: ⓘ

Participation Frequency

	Expected Participation Frequency	How Long	Start Date	End Date	
edit	1 time WEEKLY	6 MONTHS	05/12/2011		delete

Provider Information

	Provider	Provider Address	
view	Helping Friends Professional Services	5566 Oak Street, Somewhere, OH 43267	unlink

Service Goal History

	Service Goal	Effective Date	
--	--------------	----------------	--

Managing Case Services

As mentioned above, for a **Referred** status, multiple providers can be linked. To do so, complete the following steps:

4. After linking the first provider, click the **Add Provider Status** button again.
5. On the **Status Details** screen, select **Referred** in the **Status** field.
6. Select the **Status Begin Date**. The system automatically default the previously selected provider in the **Provider Information** section.
7. Unlink that provider (using the steps in the sub-section below).
8. Link another provider (using the steps in this sub-section).
9. Click the **Save** button. The **Service Information** screen appears displaying the multiple providers as shown below.
10. Repeat these steps as many times as needed to show all providers for the **Referred** status.

Service Information

Agency:

Risk Contributors:

Effective Date: * Estimated Service End Date:

Service Category: * Service Type: *

Member Service Status History

Current Status All Statuses

	Case Member	Status	Provider	Service Description	Provider Address	Status Begin Date/End Date	Created in Error
edit		Referred				05/25/2011	
edit		Referred				05/19/2011	
edit authorize		Provided				07/09/2010 - 05/13/2011	

Managing Case Services

Unlinking a Provider

To unlink a provider, complete the following steps:

1. On the **Status Details** screen in the **Provider Information** section, locate the appropriate row.
2. Click the **Unlink** link on the right.

The screenshot shows a web interface with three main sections: Participation Frequency, Provider Information, and Service Goal History. The Participation Frequency section contains a table with the following data:

Expected Participation Frequency	How Long	Start Date	End Date
1 time WEEKLY	6 MONTHS	05/12/2011	

Below the table is an "Add Frequency" button. The Provider Information section contains a table with the following data:

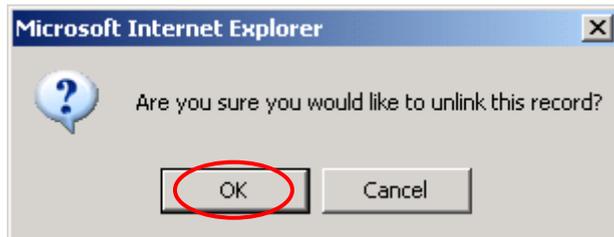
Provider	Provider Address
Helping Friends Professional Services	5566 Oak Street, Somewhere, OH 43267

Below the table is a "Link Provider" button. The Service Goal History section contains a table with the following data:

Service Goal	Effective Date
--------------	----------------

Below the table is an "Add Service Goal" button. The "Unlink" link in the Provider Information table is circled in red.

3. Click the **OK** button when the following warning message appears:



The **Provider Information** section appears displaying **no provider information**.

The screenshot shows the Provider Information section with an empty table:

Provider	Provider Address
----------	------------------

Below the table is a "Link Provider" button.

You can link a new provider following the steps in the **Linking a Provider** subsection.

Managing Case Services

Adding Service Goals

To add a service goal, complete the following steps:

1. On the **Status Details** screen, click the **Add Service Goal** button.

The screenshot shows the 'Status Details' screen with three main sections: 'Participation Frequency', 'Provider Information', and 'Service Goal History'. The 'Add Service Goal' button in the 'Service Goal History' section is circled in red.

Participation Frequency				
	Expected Participation Frequency	How Long	Start Date	End Date
edit	1 time WEEKLY	6 MONTHS	05/12/2011	delete

Add Frequency

Provider Information	
Provider	Provider Address
view Helping Friends Professional Services	5566 Oak Street, Somewhere, OH 43267 unlink

Link Provider

Service Goal History	
Service Goal	Effective Date
Add Service Goal	

The **Service Goal History Details** screen appears.

2. In the **Service Goal** field, select the appropriate goal from the drop-down list.
3. In the **Effective Date** field, enter the effective date. The case service effective date auto-populates, but it can be changed.
4. Click the **OK** button.

The screenshot shows the 'Service Goal History Details' screen. The 'Service Goal' field is set to 'In Home Group' and the 'Effective Date' field is set to '05/05/2011'. Both fields are highlighted with a red box. The 'OK' button is also circled in red.

Service Category: Counseling Service Type: Family Counseling

Service Goal: * In Home Group **Effective Date:** * 05/05/2011

OK Cancel

The **Status Details** screen appears displaying the now populated **Service Goal History** section as shown below.

The screenshot shows the 'Status Details' screen with the 'Service Goal History' section updated. The 'Add Service Goal' button is now circled in green.

Service Goal History	
Service Goal	Effective Date
edit In Home Group delete	05/05/2011

Add Service Goal

Managing Case Services

5. To edit this record, click the **Edit** link on the left (as shown in green above). After editing the record, click the **OK** button again.
6. To delete this record, click the **Delete** link on the right. Then, click the **OK** button.
7. To add another service goal record, click the **Add Service Goal** button again.

Applying Information to Other Case Members

To apply this same information to other case members, complete the following steps:

1. On the **Status Details** screen, scroll down to the **Apply to Other Members** section.
2. Enter a check mark in the box of the applicable case member(s).

Important: If you click the **check box in the header** (circled in green below), the system will select **all of the case members** in the list.

3. Click the **Save** button at the bottom of the screen.

<input type="checkbox"/>	Case Member	Status	Provider	Status Begin Date/End Date
<input checked="" type="checkbox"/>	Smith, John			
<input checked="" type="checkbox"/>	Smith, Mary			
<input checked="" type="checkbox"/>	Smith, Tim			
<input checked="" type="checkbox"/>	Smith, Jane			

The **Service Information** screen appears displaying all of the selected case members as shown below.

	Case Member	Status	Provider	Service Description	Provider Address	Status Begin Date/End Date	Created in Error
edit authorize	Smith, John	Provided				05/12/2011	
edit authorize	Smith, Mary	Provided				05/12/2011	
edit authorize	Smith, Tim	Provided				05/12/2011	
edit authorize	Smith, Jane	Provided				05/12/2011	

Managing Case Services

Editing Individual Status Records

You can edit many aspects of a status record, such as:

- Adding, editing, or deleting a case member's participation frequency
- Unlinking a provider and linking a new provider in the current record
- Linking multiple providers to a record which has a status of Referred
- Adding, editing, or deleting new service goals
- End-dating a case status

To edit a status record, complete the following steps:

1. Navigate to the case member's **Service Information** screen.
2. Click the **Edit** link next to the appropriate case member record.

The screenshot shows the 'Service Information' screen. It includes fields for Agency, Risk Contributors, Effective Date (07/09/2010), Estimated Service End Date, Service Category (Case Management), and Service Type (Case Planning). Below these is the 'Member Service Status History' section, which has tabs for 'Current Status' and 'All Statuses'. A table displays the status history with columns: Case Member, Status, Provider, Service Description, Provider Address, Status Begin Date/End Date, and Created in Error. The table contains two rows, both with a status of 'Provided'. The 'edit' link in the first row is circled in red.

Case Member	Status	Provider	Service Description	Provider Address	Status Begin Date/End Date	Created in Error
edit authorize	Provided					
edit authorize	Provided					

The **Status Details** screen for that record appears.

3. To edit any of the items listed above, refer to the applicable sub-section in this Knowledge Base Article. See the Table of Contents to locate a specific topic.
4. When complete, click the **Save** button at the bottom of the screen.



The **Service Information** screen appears.

Managing Case Services

Adding a New Case Member Service Status

To add a new case member service status record, complete the following steps:

1. Navigate to the **Case Services** section for that case member.
2. In the appropriate row, click the **Edit** link (on the left).

Justification/Waiver
Case Services
Court
Initial Removal
Placement Request
Placement
Visitation Plans
Independent Living
Case Plan
Case Review/SAR
Safety Reassessment
Reunification Assessment

Case Services
Service: [dropdown] **Add Case Services**
Result(s) 1 to 15 of 25 Page 1 of 2

	Case Member Name (s)	Service Category / Type	Service Classification	Effective Dates	
edit	[redacted]	Case Management/Mentoring Services	Case Member	07/09/2010 -	delete service_end
[-] Case Member / Caregiver History					
edit	[redacted]	Case Management/Case Planning	Case Member	07/09/2010 -	delete service_end
[-] Case Member / Caregiver History					

The **Service Information** screen appears.

3. In the **Case Member Name** field (near the bottom), select the appropriate name.
4. Click the **Add Status / Provider** button.

Member Service Status History
Current Status All Statuses

Case Member	Status	Provider	Service Description	Provider Address	Status Begin Date/End Date	Created in Error
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	05/05/2011	[redacted]

Case Member Name: [dropdown]
Smith, John
Smith, Mary
Smith, Tim
Smith, Jane

Add Status / Provider

Apply Save Cancel

HOME | HELP & TRAINING | AGENCY SEARCH | UAT version 1.108.0

The **Status Details** screen appears.

5. In the **Status** field, select the new case status from the drop-down list (as shown below).

Note: You can have multiple **Referred** statuses at the same time.

Managing Case Services

6. In the **Status Begin Date** field, enter the appropriate date.
7. To link a provider, follow the steps in the **Linking a Provider** sub-section of this Knowledge Base Article.

The screenshot shows the 'Status Details' form. The 'Status' dropdown is set to 'Provided' and the 'Status Begin Date' is '05/17/2011'. The 'Link Provider' button is highlighted with a red box. The form also includes fields for 'Service Category', 'Service Type', 'End Reason', and 'Secondary End Reason'. Below the form is a table for 'Participation Frequency' and a table for 'Provider Information'.

8. On the **Status Details** screen, update the following sections (as needed) using the steps previously discussed in this Knowledge Base Article:
 - Participation Frequency (**Adding Participation Frequency** sub-section)
 - Service Goal History (**Adding Service Goals** sub-section)
 - Apply to Other Members (**Applying Information to Other Case Members** sub-section)
9. When complete, click the **Save** button at the bottom of the screen. The **Service Information** screen appears.

Important: Upon save, the system populates the status end date of the previous non-end dated status record using the status begin date (shown in green below).

10. On the **Member Service Status History** screen, if you click the **All Statuses** radio button, you will see all status records for the case service.

The screenshot shows the 'Member Service Status History' screen. The 'All Statuses' radio button is selected. The table below shows two status records:

Case Member	Status	Provider	Service Description	Provider Address	Status Begin Date/End Date	Created in Error
edit	Referred				05/10/2011	
view	Needed				05/05/2011 - 05/10/2011	

Managing Case Services

Adding a New Caregiver Service

You should only select **Caregiver** when one of the children is in placement. To add a new caregiver service, complete the following steps:

1. Navigate to the **Case Services** section for that case member.
2. In the **Service** field, select **Caregiver** from the drop-down list.
3. Click the **Add Case Services** button.



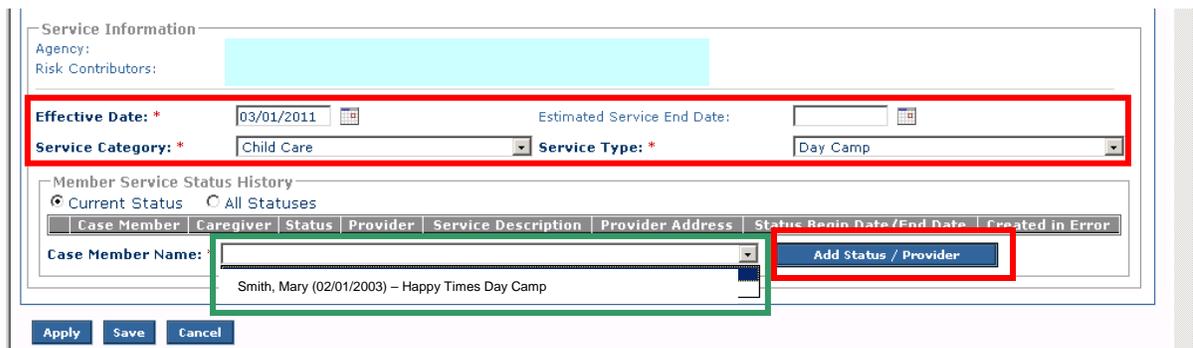
The screenshot shows the 'Case Services' section of a web application. On the left is a navigation menu with links: Case Services, Court, Initial Removal, Placement Request, Placement, Visitation Plans, Independent Living, and Case Plan. The main area is titled '- Case Services' and contains a 'Service:' dropdown menu with 'Caregiver' selected. Below it is a table with columns: 'Result(s)', 'Service Category / Type', 'Service Classification', and 'Effective Dates'. The table has one row with a highlighted green cell in the 'Result(s)' column. To the right of the table are links for 'edit', 'delete', and 'service_end'. At the bottom, there is a button labeled 'Add Case Services' and a link for 'Case Member / Caregiver History'.

The **Service Information** screen appears.

4. In the **Effective Date** field, enter the appropriate date.
5. In the **Service Category** field, select the appropriate category from the drop-down list.
6. In the **Service Type** field, select the appropriate type from the drop-down list.
7. In the **Case Member Name** field, select the appropriate name from the drop-down list.

Important: The case member displays along with his / her current provider (shown in green below) and **will only display** if the child is / was in placement on the effective date of the service.

8. Click the **Add Status / Provider** button.



The screenshot shows the 'Service Information' screen. It has a form with fields for 'Effective Date: *' (03/01/2011), 'Estimated Service End Date:', 'Service Category: *' (Child Care), and 'Service Type: *' (Day Camp). Below this is a 'Member Service Status History' section with radio buttons for 'Current Status' and 'All Statuses'. A table with columns: 'Case Member', 'Caregiver', 'Status', 'Provider', 'Service Description', 'Provider Address', 'Status Begin Date / End Date', and 'Created in Error'. The table has one row with a highlighted green cell in the 'Case Member' column. To the right of the table is a button labeled 'Add Status / Provider'. At the bottom are buttons for 'Apply', 'Save', and 'Cancel'.

The **Status Details** screen appears.

Managing Case Services

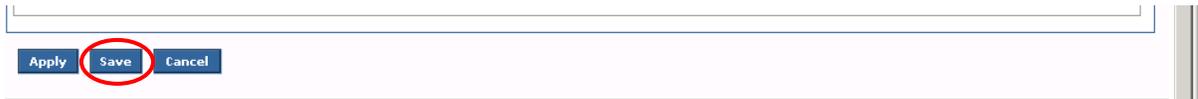
9. To finish adding a caregiver service, complete the steps as discussed in the **Adding a New Case Service** sub-section. Begin with the step where the **Status Details** screen appears. (The steps for adding a case member or a caregiver are the same from that point on.)

10. Next, complete the steps in the following sub-sections as previously discussed in this Knowledge Base Article:

- **Linking a Provider** (required for **Referred**, **Scheduled**, and **Provided** statuses)
- **Adding Participation Frequency** (if needed)
- **Adding Service Goals** (if needed)
- **Applying Information to Other Members** (children in placement) (if needed)

11. When complete, click the **Save** button at the bottom of the **Status Details** screen. The **Service Information** screen appears.

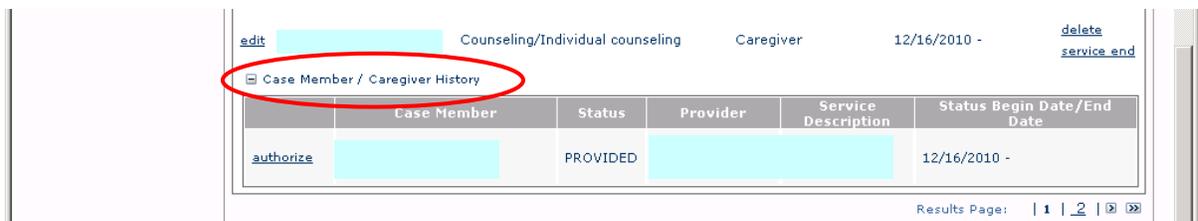
12. Click the **Save** button again.



The **Case Services** screen appears displaying the new caregiver record as shown here.



13. If needed, click the **Case Member / Caregiver History** link for that row to expand the box and view historical details.



Managing Case Services

Marking a Status Record as Created in Error

To mark a status record as created in error, complete the following steps:

1. On the **Case Services** screen for that case member, click the **Edit** link in the appropriate row.

Justification/Waiver
Case Services
Court
Initial Removal
Placement Request
Placement
Visitation Plans
Independent Living
Case Plan

Case Services
Service: [dropdown] **Add Case Services**

Result(s) 1 to 15 of 25 Page 1 of 2

Case Member Name (s)	Service Category / Type	Service Classification	Effective Dates	
[redacted]	Case Management/Mentoring Services	Case Member	07/09/2010 -	delete service_end

Case Member / Caregiver History

The **Service Information** screen appears.

2. In the **Member Service Status History** section, click the appropriate **Edit** link.

Service Information
Agency: [redacted]
Risk Contributors: [redacted]

Effective Date: * 07/09/2010 Estimated Service End Date: [calendar icon]
Service Category: * Case Management Service Type: * Case Planning

Member Service Status History
 Current Status All Statuses

	Case Member	Status	Provider	Service Description	Provider Address	Status Begin Date/End Date	Created in Error
edit	[redacted]	Provided	[redacted]	[redacted]	[redacted]	05/12/2011	
authorize	[redacted]	Provided	[redacted]	[redacted]	[redacted]	05/12/2011	
edit	[redacted]	Provided	[redacted]	[redacted]	[redacted]	05/12/2011	
authorize	[redacted]	Provided	[redacted]	[redacted]	[redacted]	05/12/2011	

Case Member Name: * [dropdown] **Add Status / Provider**

The **Status Details** screen appears.

3. Scroll down and click the **Created in Error** check box (located below the **Comments** field).

Comments: [text area]

Spell Check **Clear** 4000

Created in Error

Managing Case Services

4. Click the **Save** button at the bottom of the screen.

The **Service Information** screen appears with that record removed from the **Member Service Status History** section.

The **Current Status** radio button (shown in green below) defaults to show only the current status for all case members created in that service.

Service Information

Agency: [Redacted]
Risk Contributors: [Redacted]

Effective Date: * 07/09/2010 Estimated Service End Date: [] []
Service Category: * Case Management Service Type: * Case Planning

Member Service Status History

Current Status All Statuses

	Case Member	Status	Provider	Service Description	Provider Address	Status Begin Date/End Date	Created in Error
edit authorize	[Redacted]	Provided	[Redacted]	[Redacted]	[Redacted]	[Redacted]	
edit authorize	[Redacted]	Provided	[Redacted]	[Redacted]	[Redacted]	[Redacted]	
edit authorize	[Redacted]	Provided	[Redacted]	[Redacted]	[Redacted]	[Redacted]	

Case Member Name: * [] [Add Status / Provider](#)

[Apply](#) [Save](#) [Cancel](#)

5. To see all “created in error” entries, click the **All Statuses** radio button.

Member Service Status History

Current Status All Statuses

	Case Member	Status	Provider	Service Description	Provider Address	Status Begin Date/End Date	Created in Error
edit authorize	[Redacted]	Provided	[Redacted]	[Redacted]	[Redacted]	[Redacted]	
edit authorize	[Redacted]	Provided	[Redacted]	[Redacted]	[Redacted]	[Redacted]	
view authorize	[Redacted]	Provided	[Redacted]	[Redacted]	[Redacted]	[Redacted]	
view authorize	[Redacted]	Provided	[Redacted]	[Redacted]	[Redacted]	[Redacted]	Yes
edit authorize	[Redacted]	Provided	[Redacted]	[Redacted]	[Redacted]	[Redacted]	

Case Member Name: * [] [Add Status / Provider](#)

All of the case members appear in the **Member Service Status History** section. The “created in error” entries for that service have a **Yes** in the **Created in Error** column (shown in green above).

Managing Case Services

End-Dating a Case Service

To end date a case service, complete the following steps:

1. On the **Case Services** screen for the case member, locate the appropriate row.
2. Click the **Service End** link (on the right).

Justification/Waiver
Case Services
Court
Initial Removal
Placement Request
Placement
Visitation Plans
Independent Living
Case Plan

Case Services
Service: [dropdown] **Add Case Services**

Result(s) 1 to 15 of 25 Page 1 of 2

	Case Member Name (s)	Service Category / Type	Service Classification	Effective Dates	
edit	[redacted]	Case Management/Mentoring Services	Case Member	07/09/2010 -	delete service end

Case Member / Caregiver History

The **Service End Details** screen appears.

3. Enter a date in the **End Date** field.

Important: If **multiple case members** are on a service, the system will end date the case service, as well as the current status record for all case members (if it has no existing end date).

4. Select a reason from the **End Reason** field drop-down list.
5. Click the **Save** button at the bottom of the screen.

Service End Details
Service Category: Case Management Service Type: Mentoring Services

End Date: 05/04/2011
End Reason: Client Schedule Conflict
Secondary End Reason: [dropdown]

As shown below, the **Case Services** screen appears displaying the record with an end date in the **Effective Dates** column. Additionally, the system displays a **View** link on the left, rather than the **Edit** link that previously appeared.

Initial Removal
Placement Request
Placement
Visitation Plans
Independent Living
Case Plan
Case Review/SAR
Case Services

Case Services
Service: [dropdown] **Add Case Services**

Result(s) 1 to 15 of 29 Page 1 of 2

	Case Member Name (s)	Service Category / Type	Service Classification	Effective Dates	
view	[redacted]	Case Management/Mentoring Services	Case Member	07/09/2010 - 05/04/2011	delete service end

Case Member / Caregiver History

Managing Case Services

End-Dating a Case Service Member Status Record

To end date a case service member status record, complete the following steps:

Note: When you end date a case service, SACWIS automatically end dates the case service member status record (if it has no existing end date) for all case members. The steps in this sub-section assume that the case service is still continuing and only the case service member status is ending.

1. On the **Case Services** screen for the case member, locate the appropriate row.
2. Click the **Edit** link (on the left).

Justification/Waiver
▶ **Case Services**
Court
Initial Removal
Placement Request
Placement
Visitation Plans
Independent Living
Case Plan
Case Review/SAR
Safety Reassessment
Reunification Assessment

Case Services
Service: [dropdown] **Add Case Services**

Result(s) 1 to 15 of 25 Page 1 of 2

	Case Member Name (s)	Service Category / Type	Service Classification	Effective Dates	
edit	[redacted]	Case Management/Mentoring Services	Case Member	07/09/2010 -	delete service_end
[-] Case Member / Caregiver History					
edit	[redacted]	Case Management/Case Planning	Case Member	07/09/2010 -	delete service_end
[-] Case Member / Caregiver History					

The **Service Information** screen appears.

3. Click the appropriate **Edit** link in the **Member Service Status History** section.

Service Information
Agency: [redacted]
Risk Contributors: [redacted]

Effective Date: * 07/09/2010 **Estimated Service End Date:** [calendar icon]
Service Category: * Case Management **Service Type:** * Case Planning

Member Service Status History
 Current Status All Statuses

	Case Member	Status	Provider	Service Description	Provider Address	Status Begin Date/End Date	Created in Error
edit authorize	[redacted]					07/09/2010	

Case Member Name: * [dropdown] **Add Status / Provider**

Apply **Save** **Cancel**

The **Status Details** screen appears.

Managing Case Services

4. In the **Status End Date** field, enter the status end date.
5. In the **End Reason** field, select an end reason from the drop-down list.
6. Click the **Save** button at the bottom of the screen.

Case ID: [redacted] Case Status: Open (06/28/2010)
Case Name: [redacted] Case Category: Ongoing

Status Details
Case Member Name: [redacted]
Service Category: [redacted] Service Type: Case Planning

Status: * Provided ⓘ
Status Begin Date: * 07/09/2010
Status End Date: * 05/04/2011 ⓘ The following end information will only be saved if an end date is entered
End Reason: Client Schedule Conflict ⓘ Secondary End Reason: [redacted]

Participation Frequency

Expected Participation Frequency	How Long	Start Date	End Date
Add Frequency			

[Save](#) [Cancel](#)

The **Service Information** screen appears displaying the end date in the **Status Begin Date / End Date** column (as shown in green below).

7. Click the **Save** button again to save the record.

Service Information | Service Review | Service Activity

Case ID: [redacted] Case Status: Open (06/28/2010)
Case Name: [redacted] Case Category: Ongoing

Service Information
Agency: [redacted]
Risk Contributors: [redacted]

Effective Date: * 07/09/2010 Estimated Service End Date: [redacted] ⓘ
Service Category: * Case Management Service Type: * Case Planning ⓘ

Member Service Status History
 Current Status All Statuses

Case Member	Status	Provider	Service Description	Provider Address	Status Begin Date/End Date	Created in Error
edit	[redacted]	[redacted]	[redacted]	[redacted]	07/09/2010 - 05/04/2011	
authorize	[redacted]	[redacted]	[redacted]	[redacted]		

Case Member Name: * [redacted] [Add Status / Provider](#)

[Apply](#) [Save](#) [Cancel](#)

The **Case Services** screen appears.

Managing Case Services

Completing a Service Review

This sub-section discusses completing a service review that is done outside of a case review.

1. On the **Case Services** screen for the case member, locate the appropriate row.
2. Click the **Edit** link (on the left).

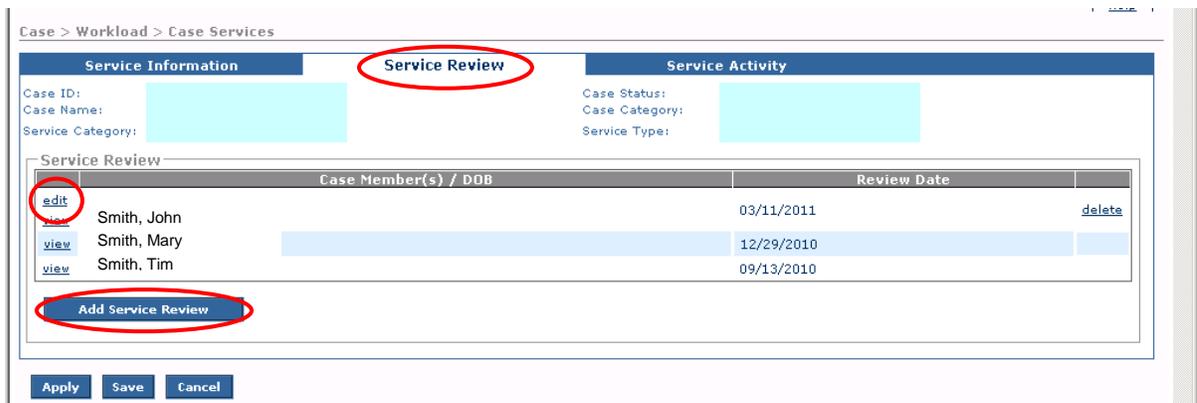


The **Service Information** screen appears.

3. Click the **Service Review** tab.

Important: From this tab, you can **edit a current** service review or **add a new** service review.

4. To edit an existing service review, click the **Edit** link in the appropriate row.
5. To add a service review, click the **Add Service Review** button.



The **Service / Activity Review Details** screen appears.

Managing Case Services

6. In the **Review Date** field, select the appropriate date. This field defaults to the current date.
7. Select the check box next to the appropriate case member(s) name as shown in orange below.

Important:

- If all of the case members need to be selected, click the check box in the header to select all.
 - More than one case member can be selected.
8. In the **Service Recommendation** column, choose from the drop-down list. The choices are **Continue**, **Modify**, or **Terminate**.
 9. In the **Barrier Type** column, select the appropriate barrier.
 10. If needed, type a recommendation into the **Recommendation Comments** field (shown in green below). **If barriers exist, this field is required.**
 11. Click the **Save** button.

Service/Activity Review Details

Review Information
Review Date: * 05/18/2011

<input type="checkbox"/>	Case Member(s) / DOB	Service Recommendation	Barrier Type
<input checked="" type="checkbox"/>	Smith, John	Continue	<ul style="list-style-type: none">Child CareTIMEFRAME TOO SHORTTOO EXPENSIVENOT FREQUENT ENOUGHSRVNOTMEET NEEDNO SLOTS AVAILABLEINCONVENIENT PLACEChild care needs prevent use of servicesClient RefusalClient Schedule Conflict

Recommendation Comments:

Barrier Comments:

Save Cancel

Managing Case Services

The **Service Review** screen appears displaying the new record.

The screenshot shows a web application interface with three tabs: Service Information, Service Review, and Service Activity. The Service Review tab is active, displaying a table with columns for Case Member(s) / DOP and Review Date. The first row is highlighted in green, and its 'delete' link is also highlighted in green. Below the table is an 'Add Service Review' button.

	Case Member(s) / DOP	Review Date	
edit view	Smith, John	05/18/2011	delete
edit view	Smith, Mary	03/11/2011	delete
view		12/29/2010	
view	Smith, Tim	09/13/2010	

[Add Service Review](#)

12. If needed, click the **Delete** link to delete the current record (shown in green above).

13. When this warning message appears, click the **OK** button.



14. If needed, click the **View** or **Edit** links to view or further edit the content (shown in green above on the left).

15. Click the **Save** button at the bottom of the screen.

The screenshot shows the bottom of the web application interface with three buttons: 'Apply', 'Save', and 'Cancel'.

The **Case Services** screen appears.

Managing Case Services

Adding a Service Activity Record

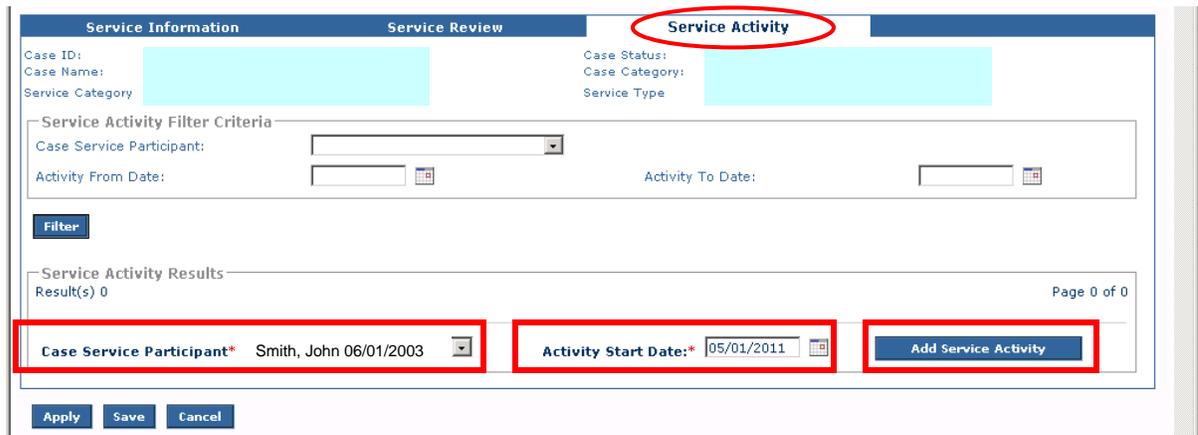
At a minimum, a **service activity (participation status)** is required to be added **once during every case review period**. To do so, complete the following steps:

1. On the **Case Services** screen for the case member, locate the appropriate row.
2. Click the **Edit** link (on the left).



The **Service Information** screen appears.

3. Click the **Service Activity** tab. The **Service Activity Filter Criteria** screen appears displaying the **Service Activity Results** section below.
4. In the **Case Service Participant** field (near the bottom), select the appropriate name from the drop-down list (only available for **Scheduled** or **Provided** status records).
5. In the **Activity Start Date** field, enter the appropriate date.
6. Click the **Add Service Activity** button.



The **Add Service Activity** screen appears displaying a calendar as shown below.

Important: Since May 1st was selected in the **Activity Start Date** field on the previous screen, the calendar only displays from that start date to the current date as shown below (in light blue). The other dates are grayed out. The calendar only displays a maximum of 90 days.

Managing Case Services

7. In the **Participation Status** field, select the appropriate choice from the drop-down list. The choices are **Attended All**, **Partial Attendance**, and **Not Attended**.

Important:

- The participation status must be added once during every case review period.
 - Completing the **Participation Status** field is required to save the record; completing the calendar is not.
8. If needed, for each enabled calendar day in the **Calendar** section, select **Attended** or **Not Attended** from the drop-down list. An example for May 1st is shown in green below.

Add Service Activity

Case Service Participant: [Redacted] Participation Status: * Attended All

Activity Start Date: 05/01/2011 Activity End Date: []

Comments: []

Spell Check Clear 2000

Sun	Mon	Tue	Wed	Thur	Fri	Sat
1 Attended	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Important: You can also apply this information to other case members within that service by completing these steps:

9. Scroll to the **Apply Other Members** section (below the calendar).
10. Select the appropriate case member check box(es).
11. Click the **Save** button.

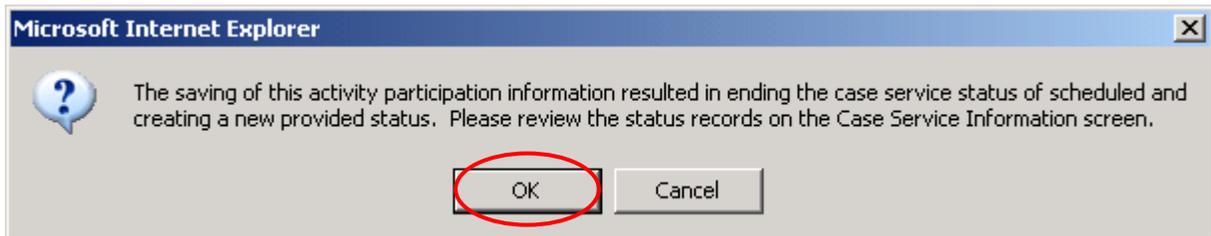
Apply to Other Members

<input type="checkbox"/>	Case Service Member / DOB
<input type="checkbox"/>	Smith, John
<input checked="" type="checkbox"/>	Smith, Mary
<input checked="" type="checkbox"/>	Smith, Tim

Apply Save Cancel

Managing Case Services

12. If the following warning message appears, click the **OK** button. Clicking OK saves and end dates the scheduled status record, as well as creates provided status records for all selected members.



The **Service Activity Filter Criteria** screen appears displaying the **Service Activity Results** section below it. The selected case member(s) now have a new service activity record as shown below.

Service Information Service Review Service Activity

Case ID: Case Name: Service Category: Case Status: Case Category: Service Type:

Service Activity Filter Criteria

Case Service Participant: Activity From Date: Activity To Date:

Filter

Service Activity Results

Result(s) 1 to 3 of 3 Page 1 of 1

	Activity Start Date	Activity End Date	Case Service Participant	Participation Status	
edit	05/01/2011		Smith, John	Attended All	delete
edit	05/01/2011		Smith, Mary	Attended All	delete
edit	05/01/2011		Smith, Tim	Attended All	delete

Case Service Participant* Activity Start Date* Add Service Activity

Apply Save Cancel

From this screen:

13. To edit a record, click the **Edit** link on the left (shown in green). After editing the record, click the **OK** button again.
14. To delete a record, click the **Delete** link on the right. Then, click the **OK** button.

Managing Case Services

Filtering Service Activity Records

To filter the service activity records by **case member** or **activity from and to date**, complete the following steps:

1. Navigate to the **Service Activity** tab (steps discussed previously).
2. At the top of the screen, select the case member's name from the **Case Service Participant** field drop-down list.
3. In the **Activity From Date** field, enter the appropriate date.
4. In the **Activity To Date** field, enter the appropriate date.
5. Click the **Filter** button.

The screenshot shows the 'Service Activity' tab selected. The 'Service Activity Filter Criteria' section is highlighted with a red border and contains the following fields:

- Case Service Participant: Smith, John 06/01/2003
- Activity From Date: 05/01/2011
- Activity To Date: 05/18/2011

The 'Filter' button is circled in red. Below the filter criteria, the 'Service Activity Results' section is highlighted with a green border and contains the following table:

Activity Start Date	Activity End Date	Case Service Participant	Participation Status
05/01/2011		Smith, John 06/01/2003	Attended All

Below the table, there are fields for 'Case Service Participant*' and 'Activity Start Date*', and an 'Add Service Activity' button. At the bottom of the page are 'Apply', 'Save', and 'Cancel' buttons.

The filtered results appear in the **Service Activity Results** section as shown in green above.

6. If needed, click the **Cancel** button to return to the **Case Services** screen.

Managing Case Services

Linking a Case Service to a Work Item

You can link a case service to a work item in SACWIS. Although case service functionality in some parts of the system have changed, **the current steps for linking a case service are still the same as they were in previous versions of SACWIS.**

You can also link a case service for one member or many members as shown below.

Example 1: If you navigate to the **Case Services** screen through a work item to link case services, you can select every case member for this service by selecting the appropriate check box(es).

The screenshot displays the 'Case Services Filter Criteria' section with various dropdown menus and date pickers. Below this is a table titled 'Case Services' with the following columns: Case Member Name(s), Service Category / Type, Service Classification, and Effective Dates. The table contains 15 rows of data, all with 'Case Member' as the service classification and '07/09/2010 -' as the effective dates. A red box highlights the checkboxes in the first column of the table rows.

Case Member Name(s)	Service Category / Type	Service Classification	Effective Dates
<input type="checkbox"/>		Case Member	07/09/2010 -
<input type="checkbox"/>		Case Member	07/09/2010 -
<input type="checkbox"/>		Case Member	07/09/2010 -
<input type="checkbox"/>		Case Member	07/09/2010 -
<input type="checkbox"/>		Case Member	07/09/2010 -
<input type="checkbox"/>		Case Member	07/09/2010 -
<input type="checkbox"/>		Case Member	07/09/2010 -
<input type="checkbox"/>		Case Member	07/09/2010 -
<input type="checkbox"/>		Case Member	07/09/2010 -
<input type="checkbox"/>		Case Member	07/09/2010 -
<input type="checkbox"/>		Case Member	07/09/2010 -
<input type="checkbox"/>		Case Member	07/09/2010 -
<input type="checkbox"/>		Case Member	07/09/2010 -
<input type="checkbox"/>		Case Member	07/09/2010 -
<input type="checkbox"/>		Case Member	07/09/2010 -

Managing Case Services

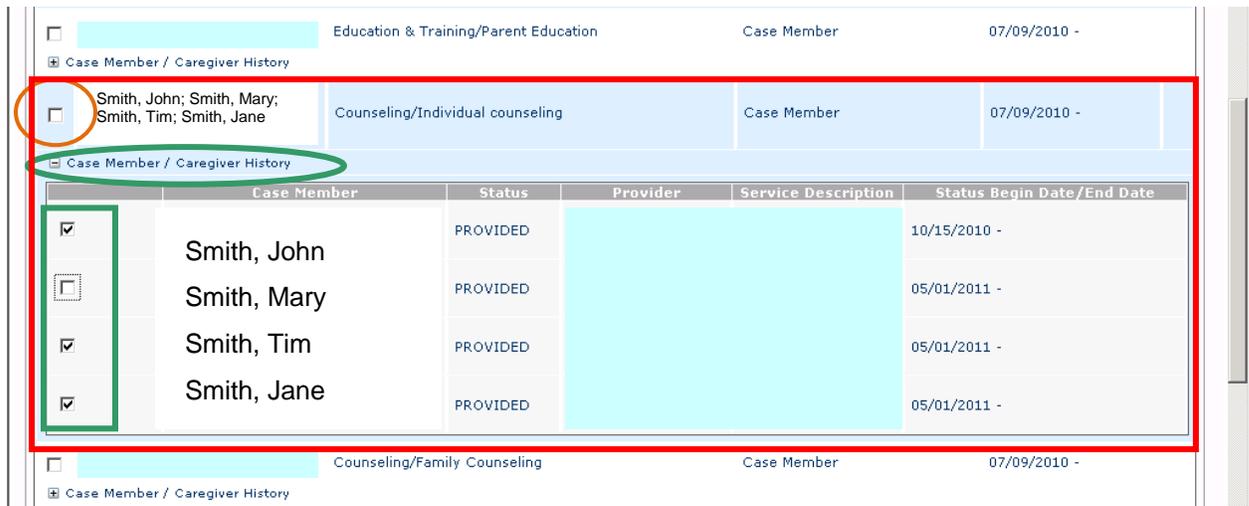
Example 2: If multiple case members appear in one row, you can click that check box to select all of the names.



<input type="checkbox"/>	[Redacted]	Education & Training/Parent Education	Case Member	07/09/2010 -
Case Member / Caregiver History				
<input checked="" type="checkbox"/>	Smith, John; Smith, Mary; Smith, Tim; Smith, Jane	Counseling/Individual counseling	Case Member	07/09/2010 -
Case Member / Caregiver History				
<input type="checkbox"/>	[Redacted]	Counseling/Family Counseling	Case Member	07/09/2010 -
Case Member / Caregiver History				

Example 3: If multiple case members appear in one row but you only want to select some of them, you can:

1. Click the **Case Member / Caregiver History** link to expand the names.
2. Click the check boxes for only the case members you want to select.
3. To select all case members, click the row's main check box (circled in orange).



<input type="checkbox"/>	[Redacted]	Education & Training/Parent Education	Case Member	07/09/2010 -	
Case Member / Caregiver History					
<input checked="" type="checkbox"/>	Smith, John; Smith, Mary; Smith, Tim; Smith, Jane	Counseling/Individual counseling	Case Member	07/09/2010 -	
Case Member / Caregiver History					
	Case Member	Status	Provider	Service Description	Status Begin Date /End Date
<input checked="" type="checkbox"/>	Smith, John	PROVIDED	[Redacted]	[Redacted]	10/15/2010 -
<input type="checkbox"/>	Smith, Mary	PROVIDED	[Redacted]	[Redacted]	05/01/2011 -
<input checked="" type="checkbox"/>	Smith, Tim	PROVIDED	[Redacted]	[Redacted]	05/01/2011 -
<input checked="" type="checkbox"/>	Smith, Jane	PROVIDED	[Redacted]	[Redacted]	05/01/2011 -
<input type="checkbox"/>	[Redacted]	Counseling/Family Counseling	Case Member	07/09/2010 -	
Case Member / Caregiver History					

4. Click the **OK** button at the bottom of the screen.



The **Service Details** screen appears.

Managing Case Services

As shown in this example, the screen still displays **all of the case members**.

Service Details
Case Plan Participant: [Redacted]
Risk Contributors: [Redacted]

Case Member Name(s)	Service Category / Type	Service Classification	Effective Dates	
Smith, John; Smith, Mary; Smith, Tim; Smith, Jane	Counseling/Individual counseling	Case Member	07/09/2010 -	unlink

Case Member / Caregiver History

[Link Service](#)

However, if you expand the **Case Member / Caregiver History** link, the screen now displays only the selected member (or members) as shown below:

Service Details
Case Plan Participant: [Redacted]
Risk Contributors: [Redacted]

Case Member Name(s)	Service Category / Type	Service Classification	Effective Dates	
Smith, John; Smith, Mary; Smith, Tim; Smith, Jane	Counseling/Individual counseling	Case Member	07/09/2010 -	unlink

Case Member / Caregiver History

Case Member	Status	Provider	Service Description	Status Begin Date/End Date	
Smith, John 06/01/2003		[Redacted]		05/01/2011 -	unlink

[Link Service](#)

Or, the selected multiple members as shown below:

Service Details
Case Plan Participant: [Redacted]
Risk Contributors: [Redacted]

Case Member Name(s)	Service Category / Type	Service Classification	Effective Dates	
Smith, John; Smith, Mary; Smith, Tim; Smith, Jane	Counseling/Individual counseling	Case Member	07/09/2010 -	unlink

Case Member / Caregiver History

Case Member	Status	Provider	Service Description	Status Begin Date/End Date	
Smith, John 06/01/2003	PROVIDED	[Redacted]		10/15/2010 -	unlink
Smith, Mary 11/25/1997	PROVIDED	[Redacted]		05/01/2011 -	unlink
Smith, Tim 04/02/1955	PROVIDED	[Redacted]		05/01/2011 -	unlink

[Link Service](#)

Managing Case Services

Case Closure

When closing a case, you must end date all paid case services. The system will automatically end date all non-paid case services with the case closure date. This is the same functionality that currently exists in SACWIS.

Case Services with a Status of Planned

For case services on closed cases or previously opened episodes that have a case member service status record of **Planned**, the case member service status record will remain as **Planned** in the system.

For case services on open cases that have a case member service status record of **Planned**, the case member service status record will be changed to **Referred** in the system.