

**Ohio SACWIS Project**  
**CM23 Create Supervisor Case**  
**Conference Notes (UC321)**  
**Version 2.0**

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Prepared for:



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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
1.5	10/29/2004		C. Roy		RRD Session
2.0	11/15/2004		Caroline Roy		RRD Final Version

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## 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 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.)

## Characteristic Information



<b>Name</b>	<b>CM23 Create Supervisor Case Conference Notes (UC321)</b>
<b>Scope</b>	 Business – Case Management
<b>Level</b>	 - Primary Task
<b>Actor(s)</b>	Supervisor
<b>Stakeholders and Interests</b>	<ol style="list-style-type: none"> <li>1. Worker</li> <li>2. County Agencies</li> <li>3. Private Agencies</li> <li>4. IV-E Agencies</li> <li>5. ODJFS</li> <li>6. State ICPC worker</li> </ol>
<b>Pre-conditions</b>	A worker and client/case record exists in SACWIS.
<b>Post-conditions</b>	Various notes and comments are documented and a task list is generated.
<b>Trigger(s)</b>	A Supervisor needs to document information specific to a worker and/or client(s) and case.
<b>Requirements Addressed</b>	RFP32

Figure 1 – Characteristic Information

## Basic Flow

## **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.

## **Main Success Scenarios**

### **Scenario 1: Create Supervisor Case Conference Notes**

1. The supervisor accesses the Supervisory Case Conference Notes page.
2. The supervisor enters worker search criteria and selects search command. *(MSS)*
3. The supervisor accesses the worker's workload which displays case assignments. Find a Workload (UC)
4. The supervisor selects the Case.
5. The supervisor chooses to create a new Case Conference Note
6. The system displays Case Conference Notes page.
7. The system displays case participants.
8. The supervisor identifies Case Participant(s) to which the Case Conference Note applies (optional). *(MSS)*
9. The supervisor records date of supervisory case conference. *(MSS)*
10. The supervisor selects category type e.g. 'Worker/Supervisor Meeting', 'Case Plan'. *(MSS)*
11. The supervisor records Case Conference details.
12. The supervisor finalized the conference task list information.
13. The supervisor records target date for the task.
14. The supervisor optionally records the priority status for the task. *(MSS)*
15. The supervisor optionally records the status for the task. *(MSS)*
16. The supervisor select task list indicator that the selected case conference note will be routed to the Case Conference Task List Template.
17. The supervisor requests the system to save Supervisor Case Conference Note information including task list information.
18. The supervisor records narrative information.
19. The supervisor records task list information. CM 50 Create Supervisory Case Conference Task List (UC)
20. The supervisor requests the system to save Supervisor Case Conference Note information.

21. The system autofills task list items to the Supervisory Case Conference Task List.
22. The supervisor records his/her name and date after finalizing the case conference notes.
23. The system locks the case conference notes and makes them non-editable.

**Scenario 2: Read(View) Supervisory Case Conference Notes**

1. The supervisor/worker 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 worker/supervisor views log of all Case Conference Notes retrieved from search.
5. The worker/supervisor optionally views details of each Case Conference Note and optionally prints one or all notes.

**Scenario 3: Update Supervisory Case Conference Notes**

6. The supervisor access Supervisory Case Conference log page of the system.
7. The supervisor enters search/sorting criteria and selects search command.
8. The system retrieves results matching search criteria.
9. The supervisor updates Case Conference Notes retrieved from search and save the changes.
10. The system saves the changes.

**Scenario 4: 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 Worker Search Criteria	Last Name First Name Worker ID County Site/Department
MSS 1 Step 9 Date of Case Conference	Date Time
MSS 1 Step 10  Category Type	<u>Category Type pick list</u> <ul style="list-style-type: none"> <li>• Adoption</li> <li>• Safety Assessment</li> <li>• Case Plan</li> <li>• Case Review</li> <li>• Case Transfer</li> <li>• Case Assignment</li> <li>• Reunification Assessment</li> <li>• Court</li> <li>• Supplemental/Concurrent</li> <li>• Staffing Internal</li> <li>• Staffing External</li> <li>• Family Assessment</li> <li>• Emergency Meeting</li> <li>• Investigation</li> <li>• Ongoing Services</li> <li>• Semi-Annual Review</li> <li>• Placement Services</li> <li>• Safety Plan</li> <li>• Supervisor/Worker Meeting</li> <li>• Independent Living Services – Pre-emancipation</li> <li>• Independent Living Services – Post-emancipation</li> <li>• Other</li> </ul>
MSS 1 Step 14 Priority Status	Priority <ul style="list-style-type: none"> <li>▪ High</li> <li>▪ Medium</li> <li>▪ Low</li> <li>▪ None (blank) Default</li> </ul>
MSS 1 Step 15 Status of Task	Status <ul style="list-style-type: none"> <li>▪ Completed</li> <li>▪ Work in Progress</li> </ul>

**Figure 2 - Important Fields**

## Special Requirements

1. The supervisory case conference notes cannot be deleted and will be locked after saving.
2. The case conference notes are created and updated by a supervisor and the worker has view only access.
3. The case conference notes are associated by case and when the case closes, those notes are taken off of the supervisor and worker case conference notes log.
4. The system will have the ability to sort, filter, print and view supervisory case conference notes.

## 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. Requirement Review 10/29/04: No Change
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. The case supervisor log must be able to be sorted by various parameters (task, date, type, worker, episode) with printing capabilities. Requirement Review 10/29/04: No Change
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. Requirement Review 10/29/04: No Change

**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

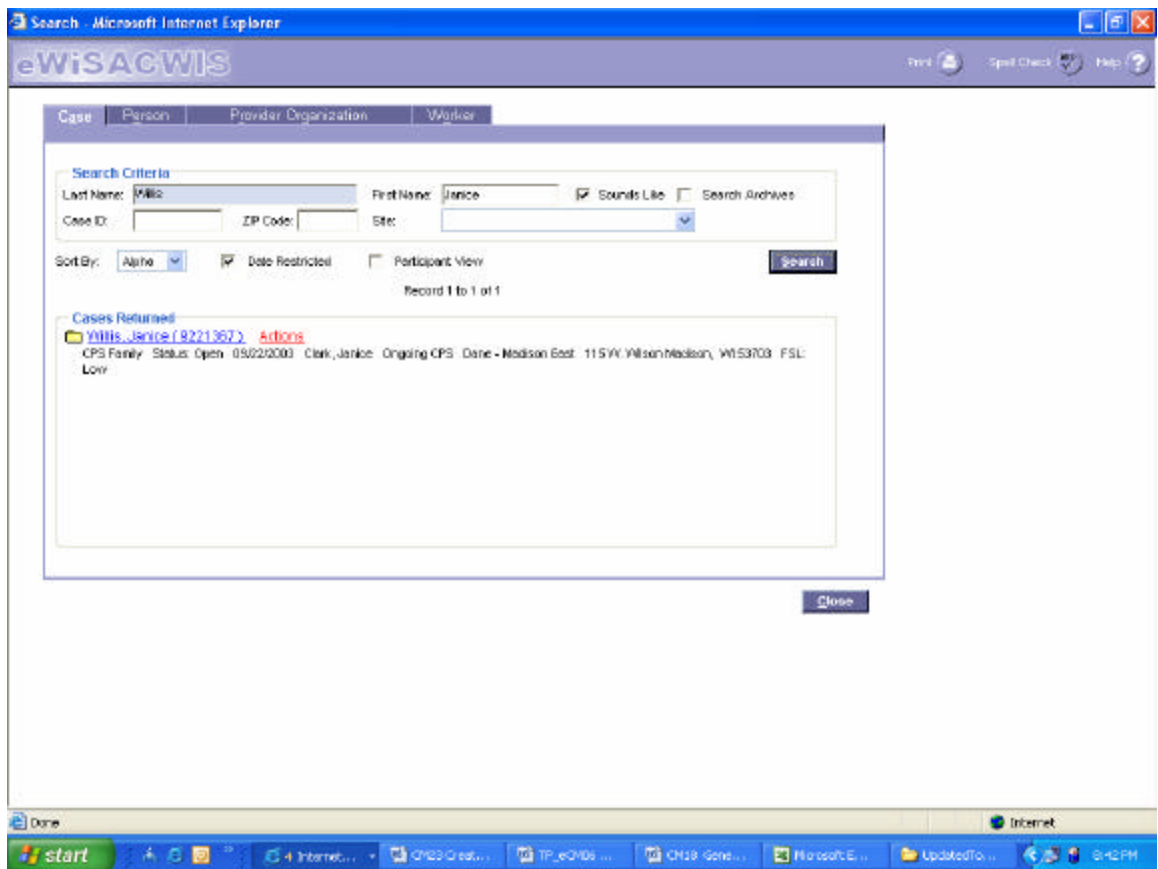


Figure 3 – Search Page

## Example B

### EXAMPLE SCREEN SHOT

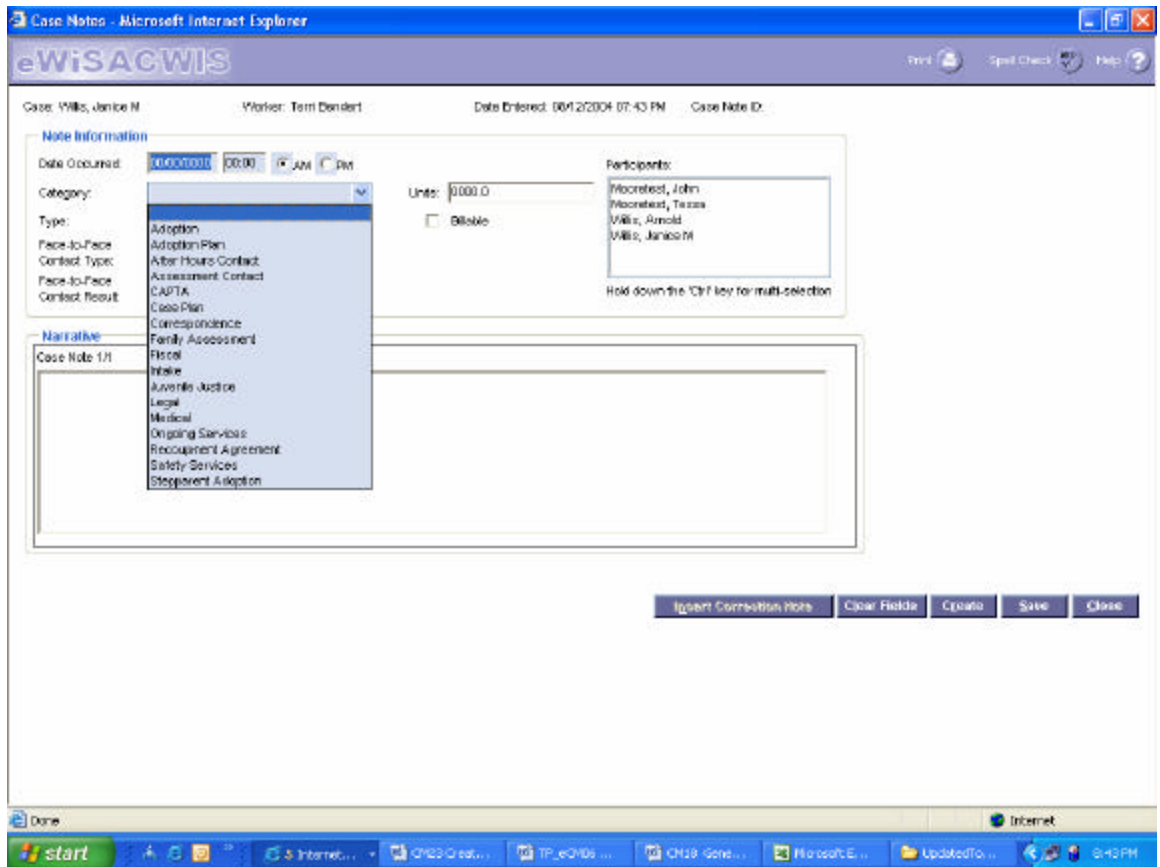


Figure 4 – Case Note Page

## Example C

### EXAMPLE SCREEN SHOT

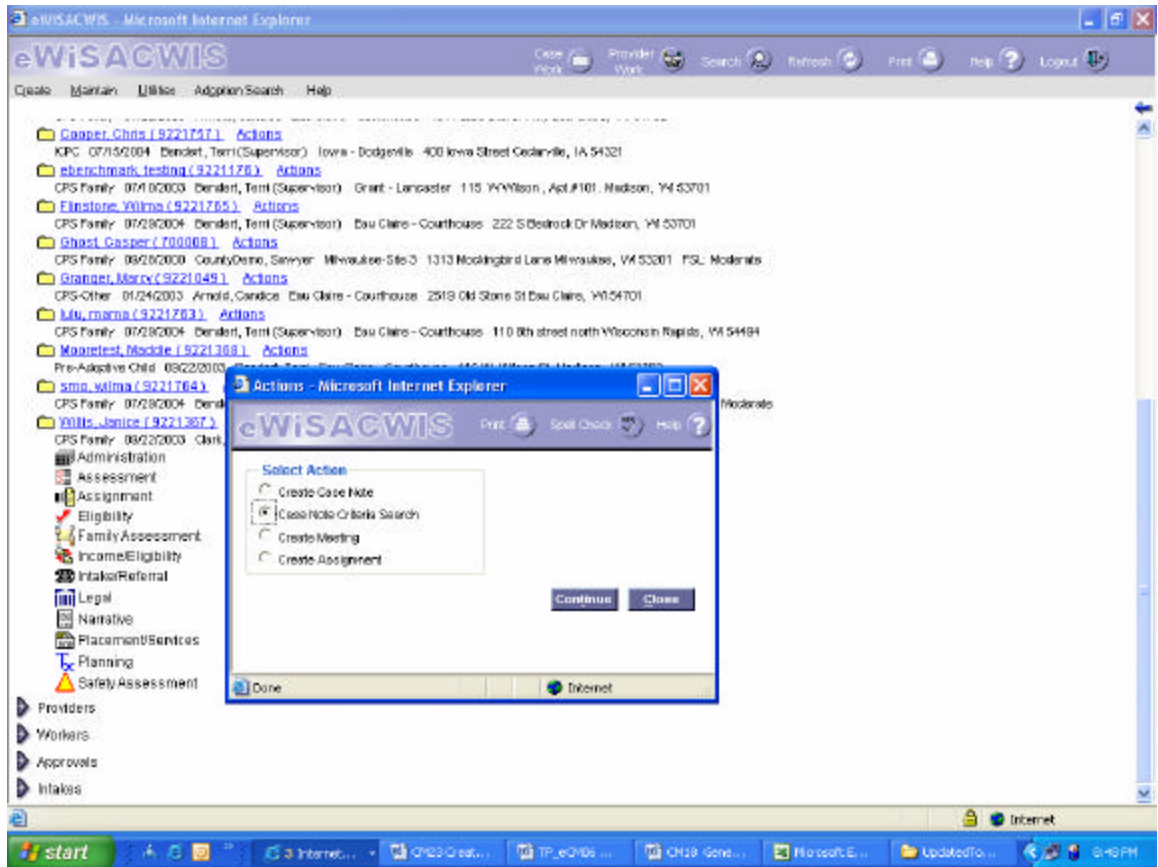


Figure 5 – View Case Note Criteria Search Page

## Example D

### EXAMPLE SCREEN SHOT

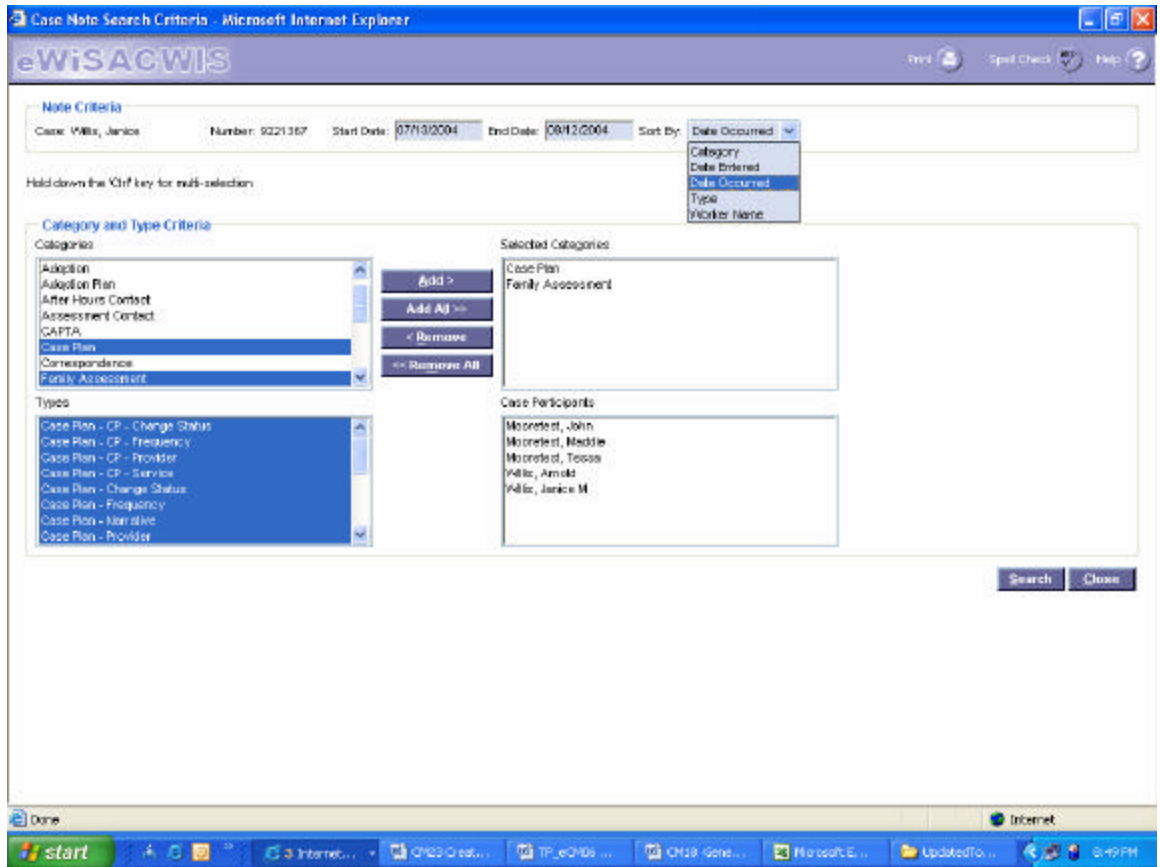


Figure 6 – Case Note Criteria Search Page

## Example E

### EXAMPLE SCREEN SHOT

Case Note Search Results - Microsoft Internet Explorer

eWiSACWIS

Note Criteria  
 Case: Mills, Janice    Number: 9221387    Start Date: 07/15/2004    End Date: 08/12/2004    Sorted by: Date Occurred

Records 1 to 2

CNID	Date Occurred	Date Entered	Category	Type	Worker Name	Billable		
9221497	08/02/2004	08/12/2004	Case Plan	Supervisor/Worker Consultation	Densert, Terri	No	<a href="#">Print</a>	<a href="#">View</a>
9221496	07/14/2004	08/12/2004	Family Assessment	Supervised Visitation	Densert, Terri	No	<a href="#">Print</a>	<a href="#">View</a>

Options:

Figure 7 – Case Note Search Results Page