Case Maintenance How Do I Guide

Case/Participant Information

Case Information

How Do I…?	Selections	Tips & Guidelines
View/update case information	▪ On the Cases expando, click on the case name. ▪ On the Maintain Case page/Participants tab, enter the applicable data/values. ▪ If appropriate, click the Options list and select the applicable option. Click the Go button. ▪ On the selected option page, enter the applicable data/values.	*The DeActivate and Remove links display for each participant in the Active Participant group box. ReActivate and Remove links display for each participant in the Inactive Participant group box.* *Remove to delete from the case, ReActivate or DeActivate to change status. Note: Only a supervisor can remove a participant.*
View/update case participant information	▪ On the Maintain Case page/Participants tab, click on the participant name in the Participants or Inactive Participants group box. ▪ On the Person Management page, enter the applicable data/values.	*When the First Name or Last Name fields are updated, the system will automatically create a row on the AKA tab.*
Add a participant to case	▪ On the Maintain Case page/Participants tab, in the Participants group box click the Insert button. ▪ On the Search Person page, enter the applicable data/values and click the Search button. ▪ For a match: Click the Select link for the applicable person(s) and click the Continue button. ▪ For no match: If displayed, click the Close button on the Validation Errors web page dialog box on the Search page. Click the Create button to access the Person Management page. Enter all applicable data/values. Click the Save button and then the Close button on the Person Management page. On the Search Person page, click the Continue button.	*Upon completion of creating a new person, If potential person matches exist, The Potential Person Match page will display a list of participants that are an exact person match. To proceed with creating a new person, click the Close button on the page. To select an existing record, click the appropriate radio-button and then click the Continue button. The participant will be added to the Participants group box on the Intake Inquiry Search page.*
Update case address information	▪ On the Maintain Case page/Address tab, enter the applicable data/values and click the Update button. ▪ On the Update Address pop-up page, select the applicable participants. ▪ Click the Save button and then the Close button.	*Note: The effective date of the address change and the new address information must be entered prior to clicking the Update button.*
View/update participant address information	▪ On the Maintain Case page/Participants tab, click on the participant name in the Active Participants or the Inactive Participants group box. ▪ On the Person Management page/Address tab, click the Edit link to update address. ▪ Enter the applicable data/values on Address Management page.	*When a participant is placed in an Out of Home Placement, his Primary Residence address may not be edited on the Person Management page/Address tab.*
Add collateral	▪ On the Maintain Case page/Collaterals tab, click the Insert button in the Collaterals group box. ▪ On the Search Person page, enter the applicable data/values and click the Search button. ▪ For a match: Click the Select link for the applicable person(s) and click the Continue button. ▪ For no match: If desired, create a new Person Record Enter all applicable data/values. Click the Save button and then the Close button on the Person Management page. On the Search Person page, click the Continue button. ▪ Select an appropriate Role from the Role drop down.	*After completing the Person Management page to create the record for a new collateral for which there was no match, you will be returned to the Search Person page to complete the search in order to add the collateral to the case.* *To delete a collateral, click the Delete link for the applicable collateral.*
Add contact	▪ From the Maintain Page/Collaterals tab, click the Other Contacts expando ▪ Select the Insert link in the Other Contacts group box. ▪ Enter the applicable data/values.	*To delete a contact, click Delete link for the applicable contact.*

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Education Information

How Do I…?	Selections	Tips & Guidelines
Establish education record	▪ Click the name of the appropriate Case to go to Person Management ▪ Click the case participant. ▪ Click the Education Tab. ▪ On the Education Tab, enter the applicable data/values.	
Document new school district jurisdiction	▪ On the School Dist. Jurisdiction History group box, click the Insert button. ▪ Enter the Applicable data/values.	
Send notification	▪ On the School Dist. Jurisdiction History group box, click the Notify link. ▪ On the Education Notification pop-up page, enter the applicable data/values. ▪ Click the Text link to access the selected template, enter the applicable data/values. ▪ Click Close and Return to eWiSACWIS.	
Add new school information	▪ On the School History group box, click Insert. ▪ On the Maintain Education History page, enter the applicable data/values.	
Update school history	▪ Go to the appropriate Participant's Person Management. ▪ Click the Education Tab. ▪ On the School History group box, select the Edit link for the applicable school history line.	

Medical/Mental Health Information

How Do I…?	Selections	Tips & Guidelines
Establish medical record	▪ Click the case name link to access the Maintain Case page. ▪ Click the person link for which medical information needs to be documented. ▪ On the Person Management page click the Medical/Mental Health link. ▪ Click the Insert button displayed at the top of the tab. ▪ Enter applicable information on the Health Concern page. ▪ To update an existing health concern click the Edit link on the Health Concern Information group box	*On the Medical/Mental Health tab workers can also add information pertaining a person's growth measurements, health insurance information, immunizations, and emergency contacts by expanding the applicable section and inserting rows as needed.* *In addition medications can be documented per health concern by inserting rows in the Medication section on the Health Concern page as needed.*
Search for a medical provider	▪ Access the Person Management page. ▪ Click the Medical/Mental Health tab. ▪ Click the Insert button to insert a new Health Concern or click the Edit link for an existing health concern. ▪ Click the Search link beside the Medical Provider/Clinic field. ▪ Enter the appropriate information in the search fields. ▪ Click the Search button.	*The Medical Provider Last Name or Clinic Name is a required field on the page.*
Add/update a medical provider	▪ If no search results are returned on the Medical Provider/Clinic Search page, click the Continue button. ▪ Enter information in the necessary fields on the Medical Provider/Clinic page. ▪ To update an existing medical provider record click the medical provider name link on the Medical/Mental Health tab.	*The Medical Provider Last Name or Clinic Name and the Medical Provider/Clinic Type fields are required.*

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Case/Participant Information

Special Needs/Unmet Needs

How Do I…?	Selections	Tips & Guidelines
Establish unmet needs record	▪ Click Create > Case Work > Administration > Unmet Needs. ▪ Click the appropriate case and case participant. ▪ Click the Create button. ▪ On the Register Unmet Needs page, enter the applicable data/values.	
View/update unmet needs record	▪ On the Cases outliner, click the appropriate Case icon. ▪ Click the Administration icon and click the applicable Unmet Needs item. ▪ On the Register Unmet Needs page, enter the applicable data/values.	
Update out of home placement services information	▪ On the Register Unmet Needs page, click the Out of Home Placement Service radio button. ▪ Select Placement from the Options list and click Go. ▪ On the Out of Home Placement page, enter the applicable data/values.	
Certify special needs	▪ Click Create > Case Work > Administration > Certification of Special Needs. ▪ Click the appropriate case and case participant. ▪ On the Certification of Special Needs page, enter the applicable data/values. ▪ Select Approval from the Options list and click Go. ▪ Click Approve and Continue.	

IV-E Eligibility

How Do I…?	Selections	Tips & Guidelines
Refer case to eligibility specialist	▪ Click Create > Case Work > Placement > Out of Home Placement. Make appropriate case and child selection > Create ▪ On the Out of Home Placement page, document child's removal date and removal reasons. ▪ Fill out all other appropriate information. ▪ Select Approval from Options list and click Go. ▪ Select Approve radio button on Approval History page > Save > Close.	*The system generates the Title IV-E Eligibility Determination record from an approved Out of Home Placement constituting a removal from home.* *Assignment and automated message to SEU Manager are generated upon approval of the Out of Home Placement by supervisor.*

Trust Accounts

How Do I…?	Selections	Tips & Guidelines
View trust account information	▪ On the Cases outliner, click the appropriate Case icon. ▪ Click the Eligibility icon and click the appropriate Trust Account. ▪ On the Trust Account page, click and view the applicable tabs.	

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Assets & Employment

How Do I…?	Selections	Tips & Guidelines
View/update participant financial information	▪ On the Cases outliner, click the appropriate case icon. ▪ Click the Income/Eligibility icon and click the applicable asset/employment item. ▪ On the Asset/Employment page, enter applicable data/values.	*Click the CARES Interface hyperlink to retrieve the participants' most recent SSI information, CARES worker, and Citizenship verification.*

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eWiSACWIS Knowledge Web

http://dcf.wisconsin.gov/wisacwis/knowledge_web/index.htm

eWiSACWIS Quick Reference Guides

http://dcf.wisconsin.gov/WiSACWIS/knowledge_web/training/quick-ref-guides/quick-reference-guides.htm

Closing Cases

Closing Cases

How Do I…?	Selections	Tips & Guidelines
Initiate and complete case closure – Closure Accepted	▪ On the Cases outliner, click on the case name. ▪ On the Maintain Case page > Closing/Merge History tab, select Submit Case Closure Request from the Options list. ▪ On the Case Closure page, enter the applicable data/values. ▪ If appropriate, select Safety from the Options list and click Go. ▪ On the Final Safety Assessment Selection page, click the applicable check box. ▪ Select Validate Case Closure Request from the options dropdown and click Go. ▪ If case closure request is accepted, select Approval from the Options list and click Go. ▪ Select Approve on Approval history page. Click Continue. ▪ On the Case Closure page, click Save and Close. ▪ Closing/Merge History tab, click Close.	*Complete the Case Record Location group box on the Closing/Merge History tab of the Maintain Case page.* *The Case Closure Summary template may be accessed via the Case Closure page by selecting Closure Summary from the Options list.* *If a screened in intake is linked to the case before approval, the case closure will be automatically 'Not Approved' with the reason: closure disrupted.* *The Final Family Assessment template available on Historical case closure records by accessing the Case Closure page and selecting Final FA from the Options list.*
Initiate and complete case closure – Closure Denied	▪ On the Cases outliner, click on the case name. ▪ On the Maintain Case page > Closing/Merge History tab, select Submit Case Closure Request from the Options list. ▪ On the Case Closure page, enter the applicable data/values. ▪ If appropriate, select Safety from the Options list and click Go. ▪ On the Final Safety Assessment Selection page, click the applicable check box. ▪ Select Validate Case Closure Request from the options dropdown and click Go. ▪ If case closure request is denied, expand the Closure Denial Messages section on the Case Closure page for information regarding those issues which need to be resolved before the case closure request can be accepted. ▪ When the case closure request is accepted, select Approval from the Options list and click Go. ▪ Select Approve on Approval history page. Click Continue. ▪ On the Case Closure page, click Save and Close. ▪ Closing/Merge History tab, click Close. *Note: For case closure requests that have been denied, you may have incomplete work or you may be missing work which would require you to create new work to address the case closure denial reason.*	*The closure status may be denied if any of the following items are not completed: CPS Reports without completed Initial Assessments, Open Placement, Pending or Ongoing Plans, Participants in Protective Custody, Approval Processing Not Complete.* *The Closure Denial Messages section of the Case Closure page or the Case Closure Edit Report from the Options list will show the specific reasons the case's closure request was denied.* *The Closure Denial Solutions document accessed from the Options list provides solution information for resolving case closure denial issues.* ***If the case closure request was denied due to incomplete work** - once you finish any incomplete work, there is no need to re-submit the case closure request. Select Validate Case Closure Request from the options dropdown on the Case Closure page and click Go.* *If the case closure was denied due to missing work, which requires new work to be created, select Not Approve for the closure request. Selecting Not Approve will end the request process allowing you to create new work for the case. You will need to re-submit the case closure request.*

Merging Persons

Merging Persons

How Do I…?	Selections	Tips & Guidelines
Merge person with person(s) identified by the potential duplicate person batch	▪ Click Utilities > Merge >Person Merge. ▪ On the Person Merge page, click the Search link in the Keep Person group box. ▪ On the Search Person page, enter the applicable data/values. ▪ Click the Search button and select the participant to be kept. Click Continue. ▪ On the Person Merge page, the system will display all potential duplicate persons based on defined matching criteria in the Potential Removal Person(s) group box. ▪ Click the check box in front of each potential duplicate person or multiple persons to be merged into the keep person. ▪ Click Save.	*The remove person on the merge record may not be a worker, have an open placement, have a previous 'Out of Home placement', overlapping placement dates (for in home services placement type), or have an open eligibility record.* *Selecting the Keep hyperlink displayed in the Potential Removal Person(s) group box for a person will update the page by to reflect that person as the Keep person.* *Selecting the Name hyperlink of the person displayed in the Potential Removal Person(s) group box will display the person management record for that person as view-only.*
Merge person with person not identified by the potential duplicate person batch	▪ Click Utilities > Merge > Person Merge. ▪ On the Person Merge page, click the Search link in the Keep Person group box. ▪ On the Search Person page, enter the applicable data/values. ▪ Click the Search button and select the participant to be kept. Click Continue. ▪ On the Person Merge page, the system will display all potential duplicate persons based on defined matching criteria in the Potential Removal Person(s) group box. Click the Manual Search link to search for a person not displayed in the Potential Removal Person(s) group box. ▪ On the Search Person page, enter the applicable data/values. ▪ Click the Search button and select the participant to be kept. Click Continue. ▪ The person you selected will display in the Potential Removal Person(s) group box as selected for merge. ▪ Click Save.	*The remove person on the merge record may not be a worker, have an open placement, have a previous 'Out of Home placement', overlapping placement dates (for in home services placement type), or have an open eligibility record.* *Selecting the Keep hyperlink displayed in the Potential Removal Person(s) group box for a person will update the page by to reflect that person as the Keep person.* *Selecting the Name hyperlink of the person displayed in the Potential Removal Person(s) group box will display the person management record for that person as view-only.*
View Person Merge denial reason or delete merge person request	▪ Click Utilities > Merge > Person Merge Delete. ▪ On the Person Merge Delete page, click the Delete checkbox for the merge person request you wish to remove. Click Save. ▪ A system message displays asking you to confirm you want to delete the person merge request. Click the appropriate button. ▪ Click Close.	

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Imaging

Imaging

How Do I…?	Selections	Tips & Guidelines
Attach a scanned image to the Case	▪ Click Create > Case Work. ▪ On the Create Case Work page select the type Category of the Image from the Imaging Case Work item. ▪ Select he Case and Case Participant(s) and click Create. ▪ When the Imaging page opens, choose the Type of image to be uploaded and Browse for a file from your local computer to be uploaded. ▪ Complete the other required fields ▪ On the Imaging page, click Save and Close.	*File types that may be uploaded to eWiSACWIS include; jpg, bmp, pdf, doc, rtf, xls, and tif.* *Hovering the mouse pointer over the View hyperlink will display a pop-up preview of the image file.* *Click the Delete button to delete an Imaging record that was created in error.* *Click the Create button to create a second imaging record for the same case.*
Search for images by Case, Provider, or Person	▪ Click Utilities > Imaging Search. ▪ In the Search by dropdown select 'Case', 'Person', or 'Provider' to launch the appropriate search page. ▪ On the Search page that opens, search and retrieve a Case, Person, or Provider. ▪ Make you selection from the Search Results and click Continue. ▪ Return to the Imaging Search page and the page will display all images that match the search criteria. ▪ Click the Edit or View hyperlinks to open the image records.	*Hovering the mouse pointer over the File Name hyperlink will display a pop-up preview of the image file.*

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eWiSACWIS Knowledge Web
http://dcf.wisconsin.gov/wisacwis/knowledge_web/index.htm

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http://dcf.wisconsin.gov/WiSACWIS/knowledge_web/training/quick-ref-guides/quick-reference-guides.htm

Merging Cases

Merging Cases

Initiate and complete case merge	▪ Click Utilities > Merge > Case Merge. ▪ On the Case Merge page, click the Search link in the Retain (keep) Case group box. ▪ On the Search Case page, enter the applicable data/values. ▪ Click the Search button and select the case to be kept. Click Continue. ▪ On the Case Merge page, click the Search link in the Case(s) to be Merged (removed) group box. ▪ On the Search Case page, enter the applicable data/values. ▪ Click the Search button and select the case to be removed. Click Continue. ▪ On the Case Merge page, click Save and then click Close.	*Multiple remove cases (open or closed) can be merged into one keep case at a time.* *If the merge is not allowed, an error message displays immediately indicating that the records cannot be merged.* *You cannot merge an open case(s) into a closed case.* *To merge cases, the reference person (person id number) needs to be the same individual in all cases.* *A Pre-adoptive/ Guardianship/ICPC Pre-adoptive case can only be merged back into the case from which it was originally created."* *The selected case will become the record for the merged cases—i.e., it will overwrite information in the current case.*
View Case Merge requests or delete merge person request	▪ Click Utilities > Case Merge Delete. ▪ On the Case Merge Delete page, click the Delete checkbox for the case merge request you wish to remove. Click Save. ▪ A system message displays asking you to confirm you want to delete the case merge request. Click the appropriate button. ▪ Click Close.	

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AFCARS

How Do I…?	Selections	Tips & Guidelines
Check for a child's AFCARS errors when the AFCARS tickler is displayed under the Tickler expando	▪ On the Ticklers outliner, click the appropriate case to expand it. ▪ Click on the hyperlink to be directly taken to the AFCARS Foster Exception page	
Check for a child's AFCARS errors when no AFCARS tickler is displayed	▪ Search out the child's person ID. ▪ Click Utilities > AFCARS. ▪ On the blank AFCARS Foster Exceptions page, click the Search link. ▪ On the Search Person page, enter the child's name or person ID in the appropriate search criteria field and click Search. ▪ Click the appropriate person icon. ▪ Click the person's Cases icon. ▪ Select the appropriate Case Folder icon. Click Continue.	*The child's person ID number is helpful for searching out the child on the AFCARS page.*
Correct AFCARS fields contained in the AFCARS Exceptions page	▪ On the AFCARS Exceptions page, enter appropriate data in blank fields with white background. ▪ Click Save.	*Once all AFCARS errors have been corrected and the nightly batch process runs the AFCARS ticklers will be deleted from the Ticklers outliner.* *For more detailed information, please access the AFCARS resources on the Knowledge Web.*
Correct AFCARS fields not contained in the AFCARS Exceptions page	▪ On the AFCARS Exceptions page, blank, non-editable fields with gray background have a brief error message in the Exception Messages box. ▪ Click Print Exception Messages. ▪ Correct data on applicable pages.	*Once all AFCARS errors have been corrected and the nightly batch process runs, the AFCARS ticklers will be deleted from the Ticklers tab.* *For more detailed information, please access the AFCARS resources on the Knowledge Web.*

AFCARS

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