Maintain Case

Note: In order to edit the Maintain Case page, an assignment to the case is needed.

1. From the desktop, select the Case Name hyperlink. This will open the Maintain Case page.

2. The Case group box displays basic identifying information about the case. The Name, Case Type, County, Site/Region, and W-2 Region (Milwaukee only) can be changed by selecting the correct option from the drop-down. The Status and associated date reflect if the case is open, reopened, or closed. If applicable, enter the CARES Case # and County Case #. The Restricted checkbox is used to restrict certain workers from viewing the case. Cases will automatically be restricted when an eWiSACWIS worker is a case participant. The Designation identifies the associated program for the case. For more information, see the associated 'Program Designation' User Guide.
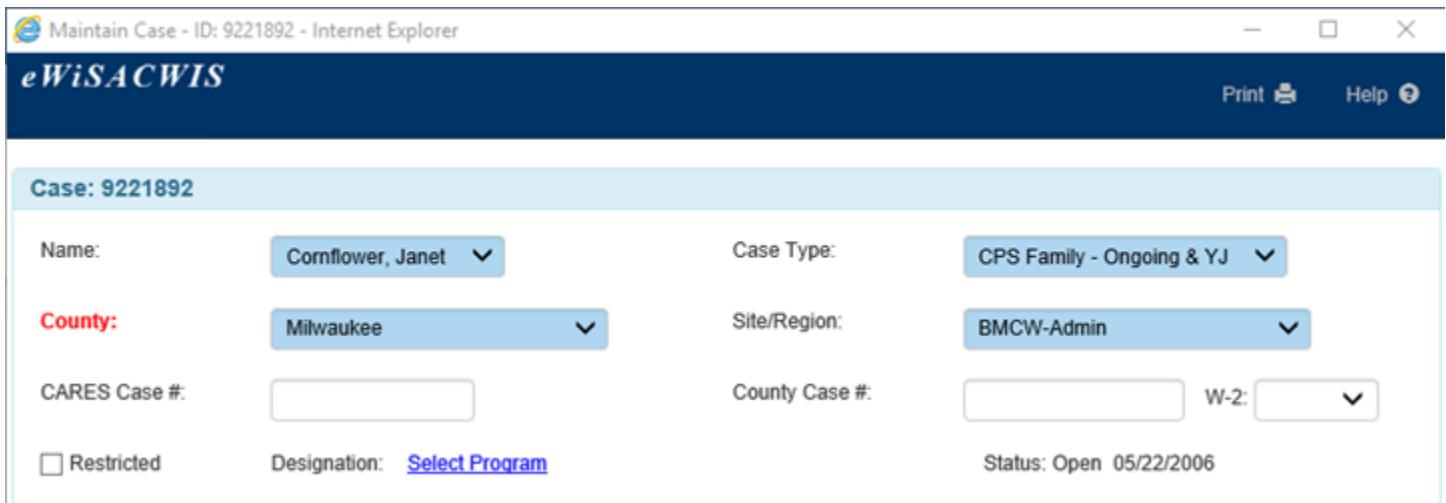
Note: If there is an open Targeted Safety Support Funds (TSSF) program assignment and the County field is changed, an informational message displays upon save that reads, "There is an open TSSF Program Assignment. Please work with your TSSF Coordinator to end assignment."

3. The Participants tab displays some relevant information on the person. Any of the columns can be sorted ascending or descending by clicking on the column name.

   Clicking on the name hyperlink for a participant will open their Person Management page. The Person Type, DOB, and Gender fields are pre-filled from the Person Management page. The Rsp checkbox is used to indicate whether your agency has responsibility for that case participant. A "Y" in the Household column indicates that the participant is a household member (U = Unknown and N = not a household member). The Relationship is the participant's relationship to the Reference Person. The Legal column displays a link to the participant's Legal Record. The Program column indicates if a participant is in a program (program assignment).

   Note: The Participants tab should not include those who are collaterals (caseworkers, foster parents, etc.). These individuals are documented on the Collaterals tab.

The DeAct hyperlink opens the Participant Status page to deactivate the participant from the case. For more information, see the associated 'Deactivating a Person' User Guide. Once you deactivate a participant, he or she will display in the Inactive Participants group box. The Rem hyperlink removes the participant from the case.

To view the inactive participants, click on the associated expando. To reactivate a participant, click the ReAct hyperlink. For more information, see the associated 'Reactivating a Person' User Guide. If a participant was deactivated for TPR or Subsidized Guardianship (where a new case is created), an associated hyperlink will appear. Clicking the (TPR) or (SG) hyperlink will open the Participant Status page.

4. The Address tab displays the current address for the case. For information on how to update multiple addresses for case participants, see the associated 'Updating Multiple Addresses' User Guide.

   Clicking the Yes button for 'Is this address a Safe at Home address?' displays the message 'This action will remove the associated address. Are you sure you want to continue? When Yes is selected on the message, the case address is updated with the Safe at Home address. The Household ID field is also added to the Safe at Home address and is required when saving the page.

When the address is not a Safe at Home address, user is required to perform an address search by clicking in the Address Search field and begin typing. If the correct address displays, select that address. If the correct address doesn't display, tab out of the Address Search field and on the pop up for 'Are you sure you want to exit the Address Search field without selecting an address? Select Yes to enter a new address manually or select No to refine your search.', select Yes to enter the address manually.

The ”Map this address” hyperlink launches a Google Maps page. On the Google Maps page, the map will automatically display the case address. To get directions to this location, enter an address in the From field and click the "Get Direction" button. Click Close to return to the Maintain Case page.
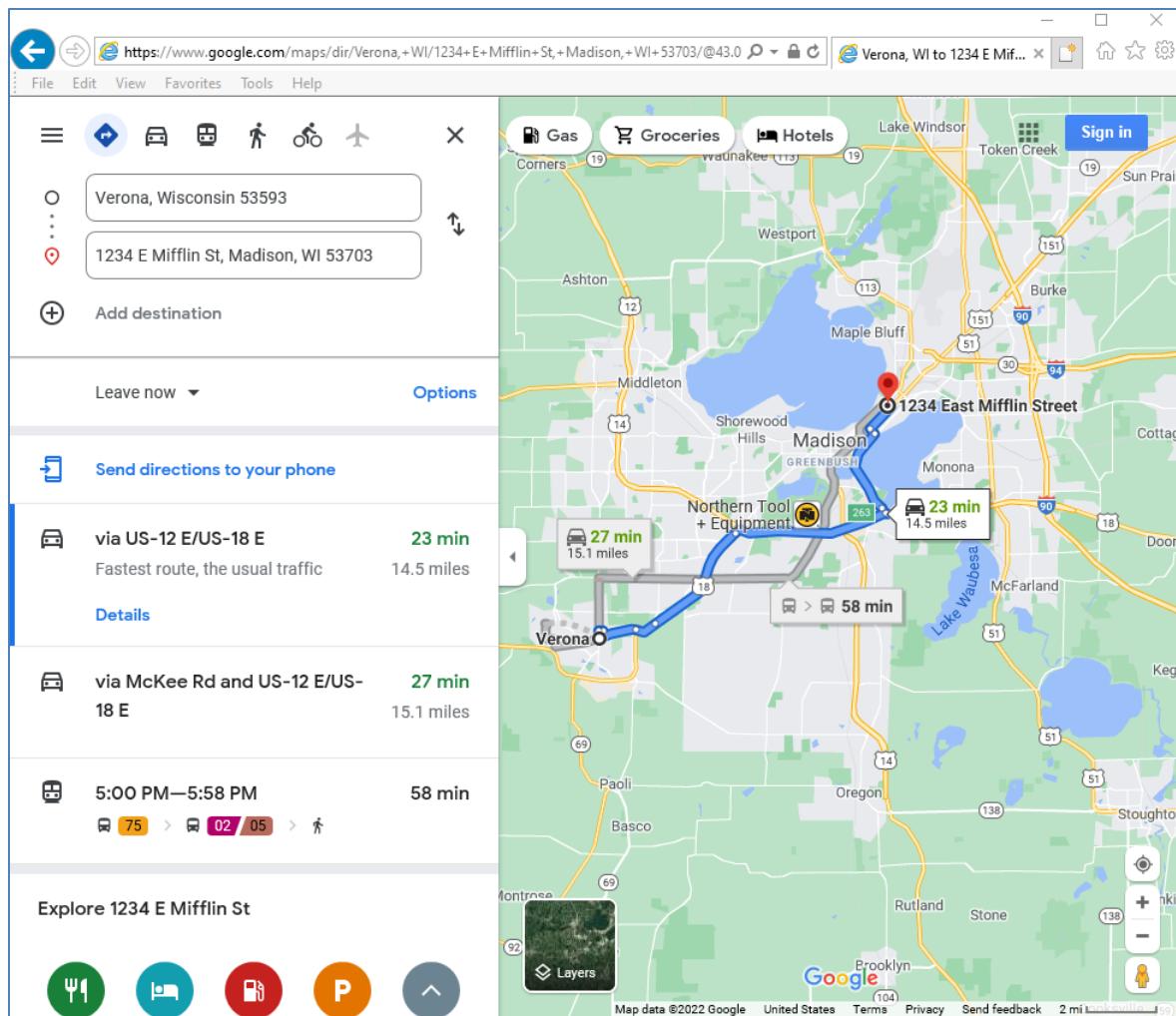
5. The Collaterals tab displays any contacts outside of the participants for the case (such as caseworkers, foster parents, and guardians ad litem). Collaterals identified here will be listed as participants on the Case Notes page.

Selecting the Insert button launches the Search Person page. Enter the person's name and select Search. Once the person is returned to the screen, click the Select hyperlink and then select the Continue button. If the person is not returned, click the Create button and add any applicable information on the Person Management page. Select the Role for the collateral.

Click the Add hyperlink to associate the case participants with the collateral. Click the Delete hyperlink to remove the collateral.

On the Case Participants page, select the checkbox next to each participant the collateral is associated with. Click Continue to return to the Maintain Case page.

Note: Click on the Other Contacts expando and click the Insert button to add any other "non-collateral" type contacts.

6. The Closing/Merge History tab displays the history of previous closures, merged cases and a case record location. If the case has been previously closed, it will display in the Case History group box. If the case has been merged with another case, the information will display in the Merged Cases group box. The Status of the Case Record Location can be selected along with the Location. Once this has changed the Last Modified By and Date will display with the workers name and the date the information was changed.

To submit a case for closure, select the Submit Case Closure Request from the Options drop-down. For more information, see the associated 'Case Closure' User Guide.

7. To Delink an Access Report from the case, select the Delink Access Report/Assessment/YJ Referral from the Options drop-down.

8. On the Delink Access Report/Assessment/YJ Referral page, select the radio button for the access report/assessment/YJ referral you would like to delink. Click the Save button. Any changes made to the Supervisor Screening Decision after delinking an access report will be tracked and outlined in the Activity groupbox on the Decision tab of the Access Report page.

Click Yes to the following message. This will move the Access Report to the Access Reports expando on your desktop.

If this is the only Access Report or Assessment, you may receive this message. Click Yes.