

Chapter 8 – Customer Case Log

Table of Contents

Accessing the Customer Case Log	8-1
Entering Information into the Case Log	8-2
Viewing the Case Log	8-3

Important The required fields referenced in this chapter refer to system-required fields. These fields are required in order for the form to be saved in approved status.

 The information that is required due to policy may be different from those that are system required.

Accessing the Customer Case Log

Introduction The Customer Case Log contains information pertinent to the customer who is receiving services.

Important There is only one Case Log per customer. The case log will continue for the duration that the customer is active.

How To Follow the steps in the table below to access the Customer Case Log.

Step	Action	Result
1.	Find the customer using Person Search .	Customer search results display.
2.	Click on the View Forms icon.	The Case Log tab appears in the navigation menu bar. Note: The Case log tab does not display from the Person Search Results page.
3.	Click on the Case Log button in the navigation menu bar.	Case Log entry form displays. By default, the logged in user is the Author for any new entries.

The screenshot shows a web application interface. At the top, there is a navigation menu with tabs: Home, Person Search, Person Admin, Person Forms, Case Log (circled in red), Organizations, Org. Members, and KAMIS M. Below the menu, the customer information is displayed: KAMIS ID: 200353367, Name: HILL, HANK, Customer Status: ACTIVE, and Primary PSA: JAYHAWK AREA AGENCY ON AGING. The 'Customer Case Log' section is active, showing a form with a 'Person Forms 30' and 'Person Admin 2' sub-menu. The form has a title 'Add Case Log Entry' and a 'SAVE' button. The form fields include 'Author' (Jo Bauer) and 'Comments' (0 of 2000).

Entering Information into the Case Log

How To

Follow the steps in the table below to make a Case Log entry.

Step	Action	Result
1.	The logged in user is, by default, entered as the Author . Change the author if appropriate.	The Author can be: <ul style="list-style-type: none"> • The person that is entering the information (default). • Case Manager or Assessor • Another person who has information to relay.
2.	Enter the Comments .	The counter below the Comments text area will show how many characters you have typed of the 2000 total allowed.

3.	Click the Save button.	The comment is saved and a new empty comment box appears.
----	-------------------------------	---

Author	Comment	Date (desc)	Added By	seq
Jo Bauer	12/11/14--phone call attempt, 12/15/14--letter sent, 1/7/15--phone call attempt, 1/12/15--phone call attempt, 1/21/15--3161 sent to MCO Sunflower and KDADS	01/21/2015	Jo Bauer	1

row(s) 1 - 1 of 1

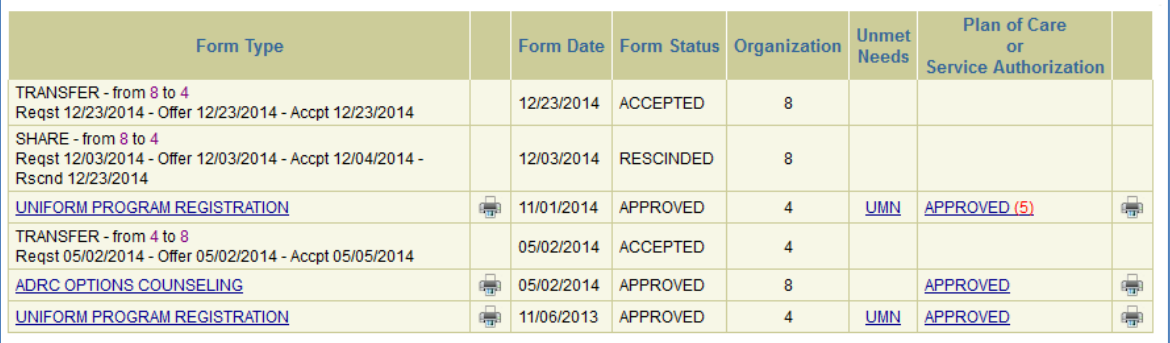
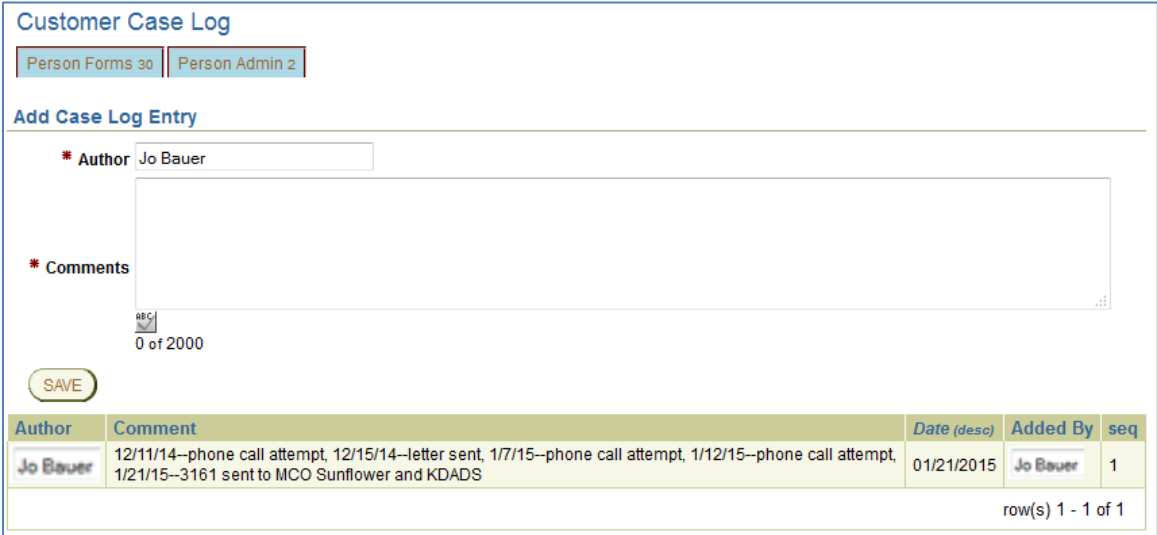
Viewing the Case Log

Introduction

The process of viewing the Case Log is the same as entering information into the Case Log.

How To

Follow the steps in the table below to review an existing Case Log.

Step	Action	Result																																										
1.	Find the customer using Person Search .	Customer search results display.																																										
2.	Click on the View Forms icon.	List of all forms associated with the customer displays.																																										
 <table border="1"> <thead> <tr> <th>Form Type</th> <th>Form Date</th> <th>Form Status</th> <th>Organization</th> <th>Unmet Needs</th> <th>Plan of Care or Service Authorization</th> </tr> </thead> <tbody> <tr> <td>TRANSFER - from 8 to 4 Reqst 12/23/2014 - Offer 12/23/2014 - Accpt 12/23/2014</td> <td>12/23/2014</td> <td>ACCEPTED</td> <td>8</td> <td></td> <td></td> </tr> <tr> <td>SHARE - from 8 to 4 Reqst 12/03/2014 - Offer 12/03/2014 - Accpt 12/04/2014 - Rscnd 12/23/2014</td> <td>12/03/2014</td> <td>RESCINDED</td> <td>8</td> <td></td> <td></td> </tr> <tr> <td>UNIFORM PROGRAM REGISTRATION</td> <td>11/01/2014</td> <td>APPROVED</td> <td>4</td> <td>UMN</td> <td>APPROVED (5)</td> </tr> <tr> <td>TRANSFER - from 4 to 8 Reqst 05/02/2014 - Offer 05/02/2014 - Accpt 05/05/2014</td> <td>05/02/2014</td> <td>ACCEPTED</td> <td>4</td> <td></td> <td></td> </tr> <tr> <td>ADRC OPTIONS COUNSELING</td> <td>05/02/2014</td> <td>APPROVED</td> <td>8</td> <td></td> <td>APPROVED</td> </tr> <tr> <td>UNIFORM PROGRAM REGISTRATION</td> <td>11/06/2013</td> <td>APPROVED</td> <td>4</td> <td>UMN</td> <td>APPROVED</td> </tr> </tbody> </table>			Form Type	Form Date	Form Status	Organization	Unmet Needs	Plan of Care or Service Authorization	TRANSFER - from 8 to 4 Reqst 12/23/2014 - Offer 12/23/2014 - Accpt 12/23/2014	12/23/2014	ACCEPTED	8			SHARE - from 8 to 4 Reqst 12/03/2014 - Offer 12/03/2014 - Accpt 12/04/2014 - Rscnd 12/23/2014	12/03/2014	RESCINDED	8			UNIFORM PROGRAM REGISTRATION	11/01/2014	APPROVED	4	UMN	APPROVED (5)	TRANSFER - from 4 to 8 Reqst 05/02/2014 - Offer 05/02/2014 - Accpt 05/05/2014	05/02/2014	ACCEPTED	4			ADRC OPTIONS COUNSELING	05/02/2014	APPROVED	8		APPROVED	UNIFORM PROGRAM REGISTRATION	11/06/2013	APPROVED	4	UMN	APPROVED
Form Type	Form Date	Form Status	Organization	Unmet Needs	Plan of Care or Service Authorization																																							
TRANSFER - from 8 to 4 Reqst 12/23/2014 - Offer 12/23/2014 - Accpt 12/23/2014	12/23/2014	ACCEPTED	8																																									
SHARE - from 8 to 4 Reqst 12/03/2014 - Offer 12/03/2014 - Accpt 12/04/2014 - Rscnd 12/23/2014	12/03/2014	RESCINDED	8																																									
UNIFORM PROGRAM REGISTRATION	11/01/2014	APPROVED	4	UMN	APPROVED (5)																																							
TRANSFER - from 4 to 8 Reqst 05/02/2014 - Offer 05/02/2014 - Accpt 05/05/2014	05/02/2014	ACCEPTED	4																																									
ADRC OPTIONS COUNSELING	05/02/2014	APPROVED	8		APPROVED																																							
UNIFORM PROGRAM REGISTRATION	11/06/2013	APPROVED	4	UMN	APPROVED																																							
3.	Click on the Case Log button in the navigation menu bar.	The Customer Case Log displays, with all previously saved entries.																																										
 <p>Customer Case Log</p> <p>Person Forms 30 Person Admin 2</p> <p>Add Case Log Entry</p> <p>* Author: Jo Bauer</p> <p>* Comments: [Text Area]</p> <p>0 of 2000</p> <p>SAVE</p> <table border="1"> <thead> <tr> <th>Author</th> <th>Comment</th> <th>Date (desc)</th> <th>Added By</th> <th>seq</th> </tr> </thead> <tbody> <tr> <td>Jo Bauer</td> <td>12/11/14--phone call attempt, 12/15/14--letter sent, 1/7/15--phone call attempt, 1/12/15--phone call attempt, 1/21/15--3161 sent to MCO Sunflower and KDADS</td> <td>01/21/2015</td> <td>Jo Bauer</td> <td>1</td> </tr> </tbody> </table> <p>row(s) 1 - 1 of 1</p>			Author	Comment	Date (desc)	Added By	seq	Jo Bauer	12/11/14--phone call attempt, 12/15/14--letter sent, 1/7/15--phone call attempt, 1/12/15--phone call attempt, 1/21/15--3161 sent to MCO Sunflower and KDADS	01/21/2015	Jo Bauer	1																																
Author	Comment	Date (desc)	Added By	seq																																								
Jo Bauer	12/11/14--phone call attempt, 12/15/14--letter sent, 1/7/15--phone call attempt, 1/12/15--phone call attempt, 1/21/15--3161 sent to MCO Sunflower and KDADS	01/21/2015	Jo Bauer	1																																								