# Chapter 8 – Customer Case Log

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**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.

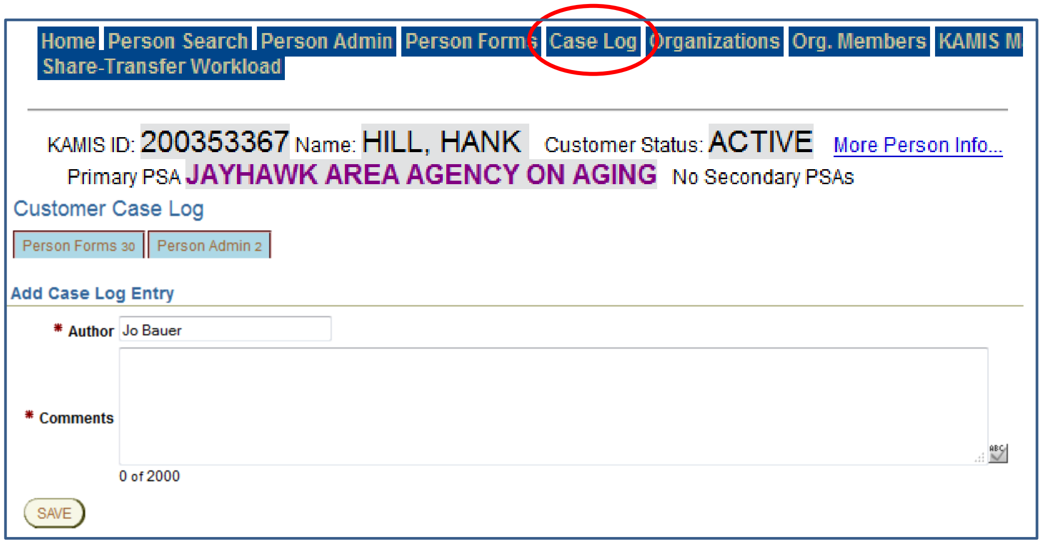
**Important**

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.

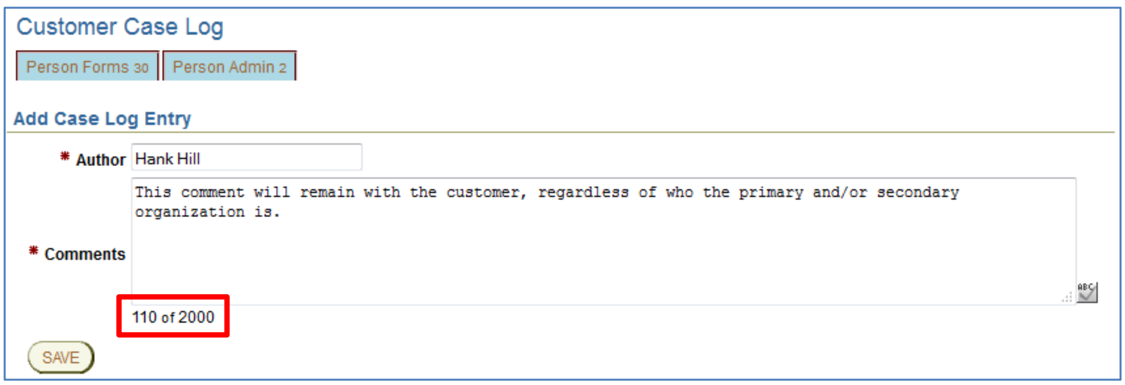
| Step | Action | Result |
|---|---|---|
| 1. | Find the customer using **Person Search**. | Customer search results display. |
| 2. | Click on the **View Forms** icon. | The Case Log tab appears in the navigation menu bar.<br>Note: The Case log tab does not display from the Person Search Results page. |
| 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. |



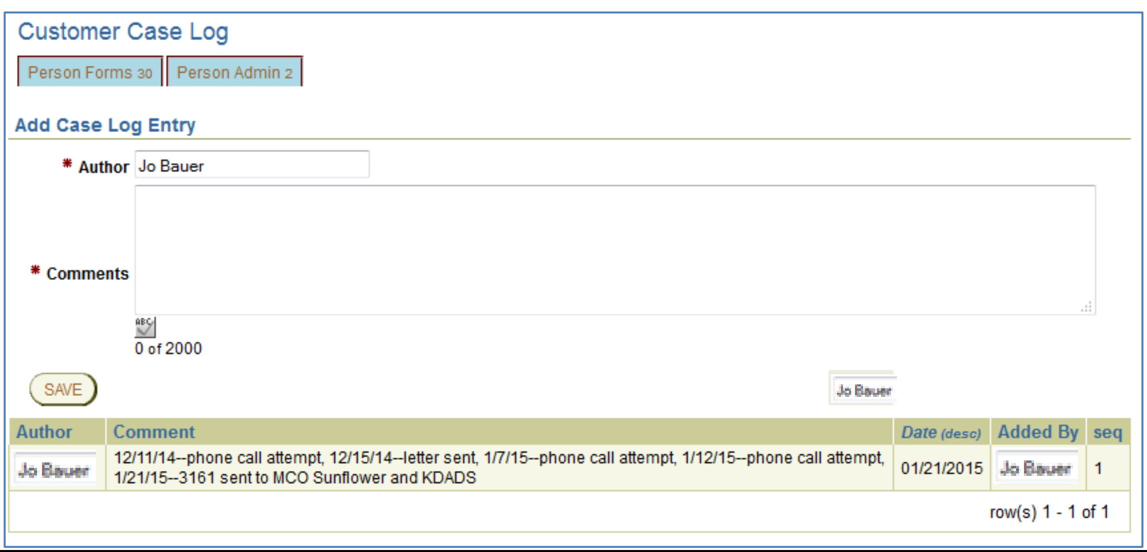
# Entering Information into the Case Log

**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:<br>• The person that is entering the information (default).<br>• Case Manager or Assessor<br>• 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. |




| Step | Action | Result |
|---|---|---|
| 3. | Click the **Save** button. | The comment is saved and a new empty comment box appears. |



# Viewing the Case Log

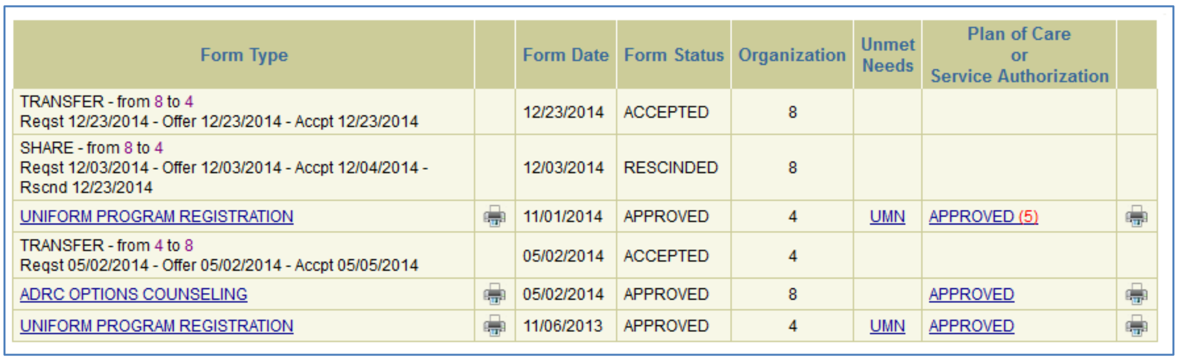
**Introduction**

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

**How To**

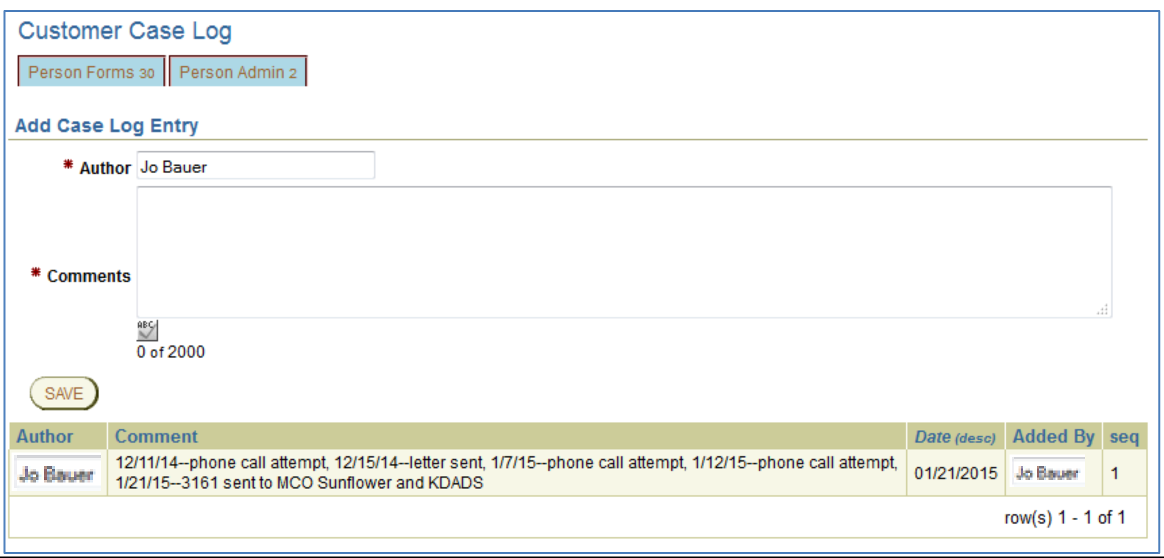
Follow the steps in the table below to review an existing Case Log.

| 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. |



| Form Type | | Form Date | Form Status | Organization | Unmet Needs | Plan of Care or Service Authorization | |
|---|---|---|---|---|---|---|---|
| TRANSFER - from 8 to 4<br>Reqst 12/23/2014 - Offer 12/23/2014 - Accpt 12/23/2014 | | 12/23/2014 | ACCEPTED | 8 | | | |
| SHARE - from 8 to 4<br>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<br>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 | |

| Step | Action | Result |
|---|---|---|
| 3. | Click on the **Case Log** button in the navigation menu bar. | The Customer Case Log displays, with all previously saved entries. |




| 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 |

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