Chapter 17 – Care Level I - 30 Day Follow-Up

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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.

Access the 30-Day Follow-Up Form

Requirement

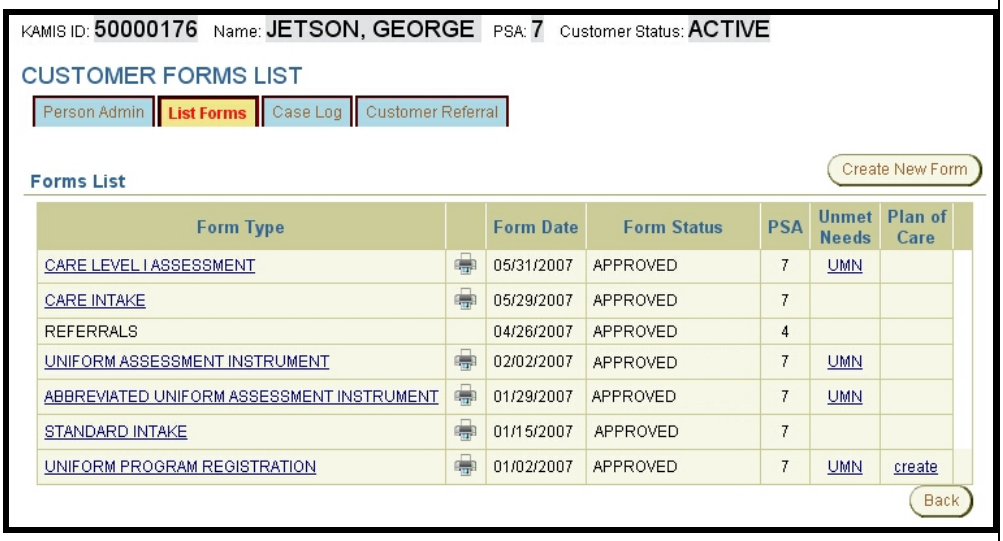
Add or update all customer and associate information first before you begin.

The CARE Level I Assessment form must be in an approved status before the 30-day Follow-up form can be accessed.

How To

Follow the steps in the table below to access the 30-Day Follow-Up form.

Step	Action	Result
1.	Locate customer through Person Search.	Customer is displayed.
2.	Single click on the **View Forms** icon.	List of all forms associated to the customer will be displayed in the lower portion of the window.



3.	In the Forms List table, locate the **CARE Level I Assessment**. Single click on the form link.	The assessment form will be displayed.

Continued on next page

Access the 30-Day Follow-Up Form, Continued

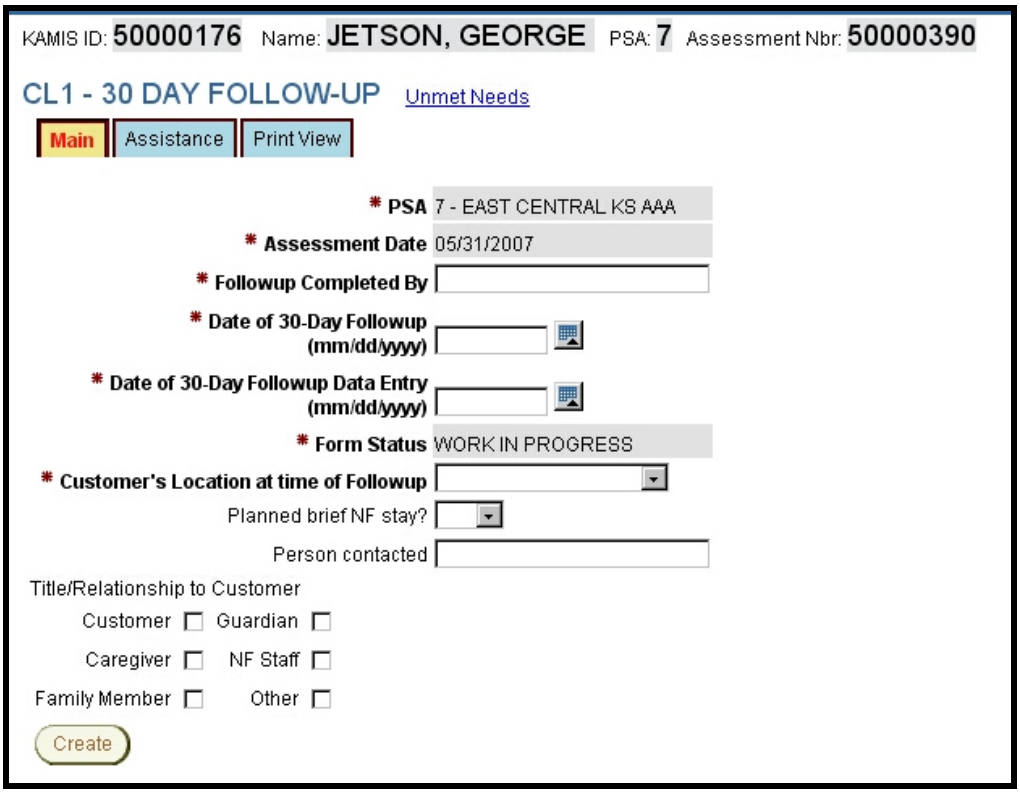
How To (continued)

Step	Action	Result
4.	The 30 day form option is displayed at the bottom of the Main page. Click on the **Create 30 day Followup** button..	Opens blank form.

Note: The 30 day follow-up button will not display unless the CARE Assessment form is in approved status.

Main Primary Navigation Tab

Main Navigation Tab



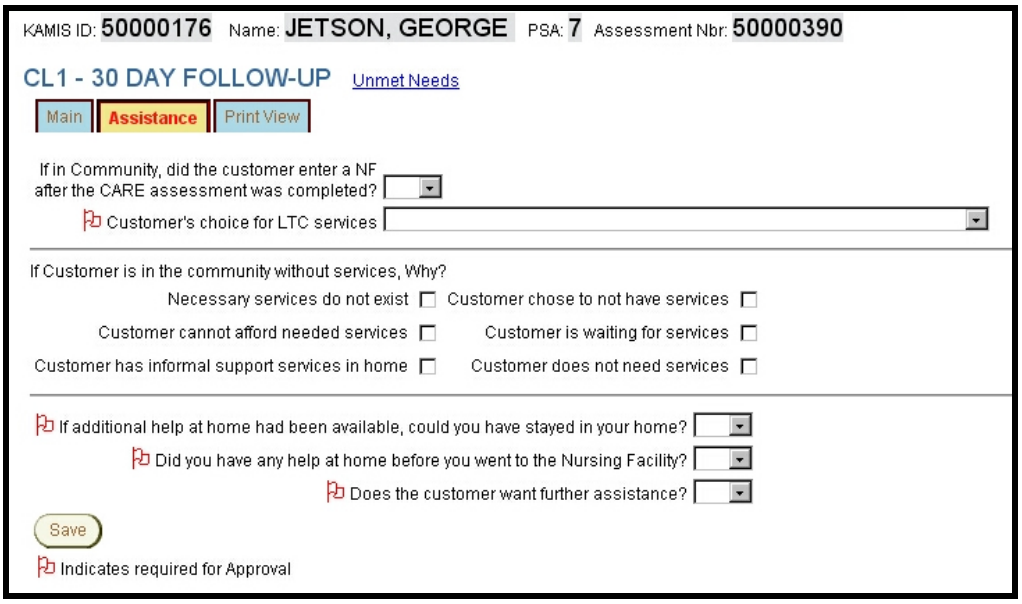
Required Fields All fields displayed on this Page are required.

Saving Form **Each navigational tab (page) must be saved before advancing to the next tab.** Once the save is successful the page will automatically forward to the next navigational level tab.

Note The form status will automatically be placed in Work in Progress status which will be uneditable until the form is saved. Once the form data entry is completed, then switch the Form Status field will be active.

Assistance Primary Navigation Tab

Assistance Navigation Tab



Required Fields All fields displayed on this Page are required.

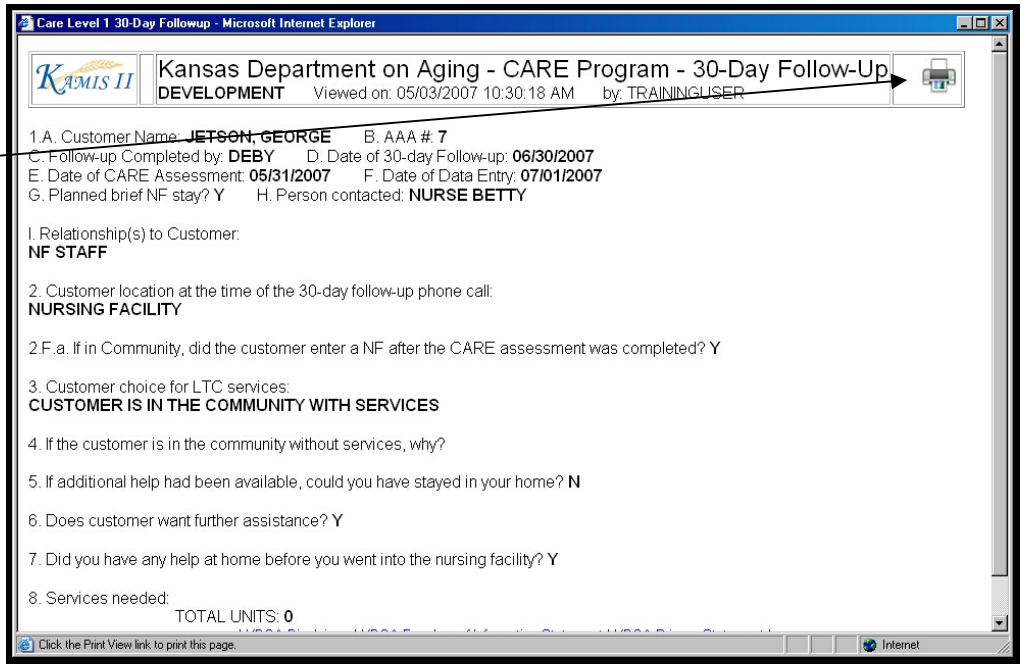
Print View

Form Reference

This tab will give the opportunity to print the assessment information in its entirety. The format will not be in the same arrangement as the form, but it will be divided into sections of information according to the paper form. This will open in a separate window from the assessment.

Print View

When printing the pages will separate as indicated.



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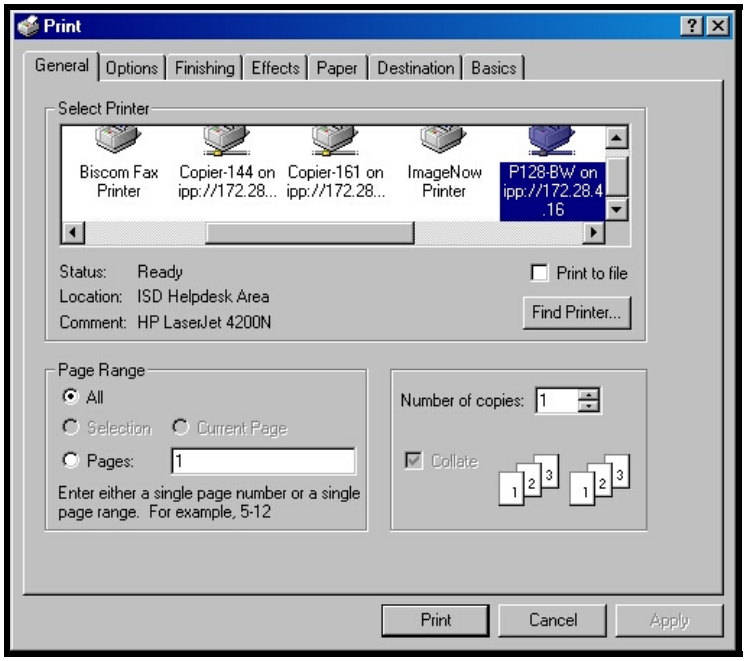
Print View, Continued

To Print

Follow the steps in the table below to complete the Customer Referral process.

Step	Action	Result
1.	Click on the **printer icon** at the top right of any region.	Printer dialog box will display. (This may look different depending upon your printer and the options available.)
		
2.	Select the **Page Range**	See table below for options.
	Option / **Result** All — All pages will print Pages (enter the page number) — Only the specified page will print.	
3.	Click on **Print**.	Document will print.

To Close

The window can be closed by clicking on the ☒ in the right upper corner.