



CASE MERGE

USER GUIDE

CASE MERGE – USER GUIDE

FUNCTIONALITY ADDRESSED:

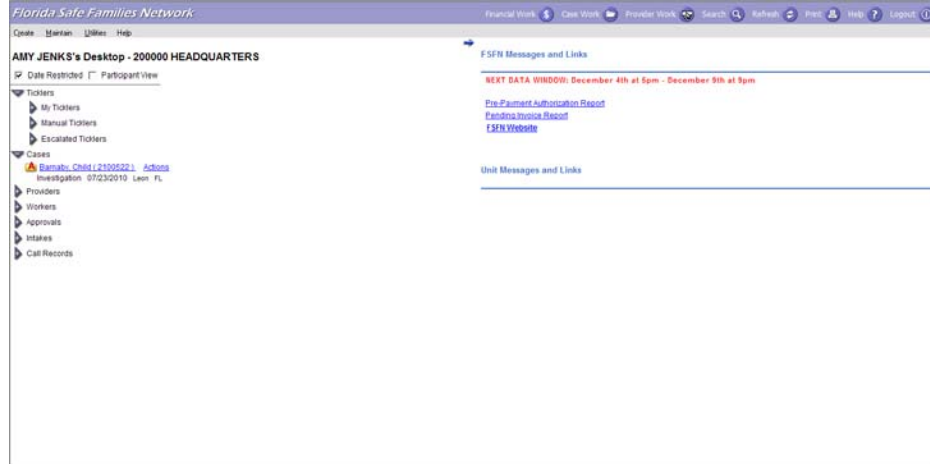
- This guide outlines the steps to perform key tasks related to closing a case for reason of merge within the Florida Safe Families Network (FSFN) application.

LEARNING OBJECTIVES:

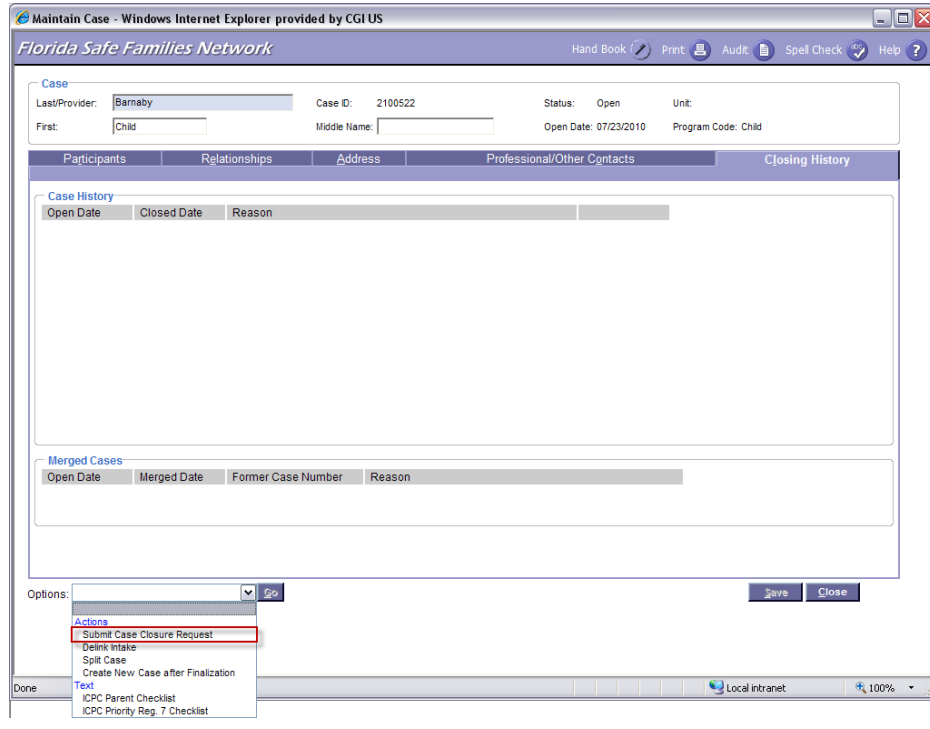
Upon completion of this course, the student will demonstrate the ability to:

- Merge an open case into an open case
- Merge an open case into a closed case
- Merge a closed case into an open case
- Merge a closed case into a closed case

DESKTOP



MAINTAIN CASE PAGE – CLOSING HISTORY TAB



Merge an open case into an 'open' or 'closed' case

1. From the Desktop select the Case needing to be closed.

The process of closing a case for the reason of merge utilizes the standard Case Closure process which has been in place since Release 1. The steps involved for closing a case have not changed.

2. Select the **Closing History** tab,

3. Select **Submit Case Closure Request** from the Options dropdown and click the **Go** button.

CASE CLOSURE PAGE

CASE SEARCH PAGE

4. Select **Merge** from the Reason dropdown.

5. Click the **Merge** hyperlink.

6. Enter the appropriate search criteria and click the **Search** button.

7. Select the radio button for the appropriate destination case, in which to merge the current case, and select the **Continue** button.

The destination case can be either an 'open' or 'closed' case.

CASE CLOSURE PAGE

FSFN DIALOG PROMPT

CASE CLOSURE PAGE

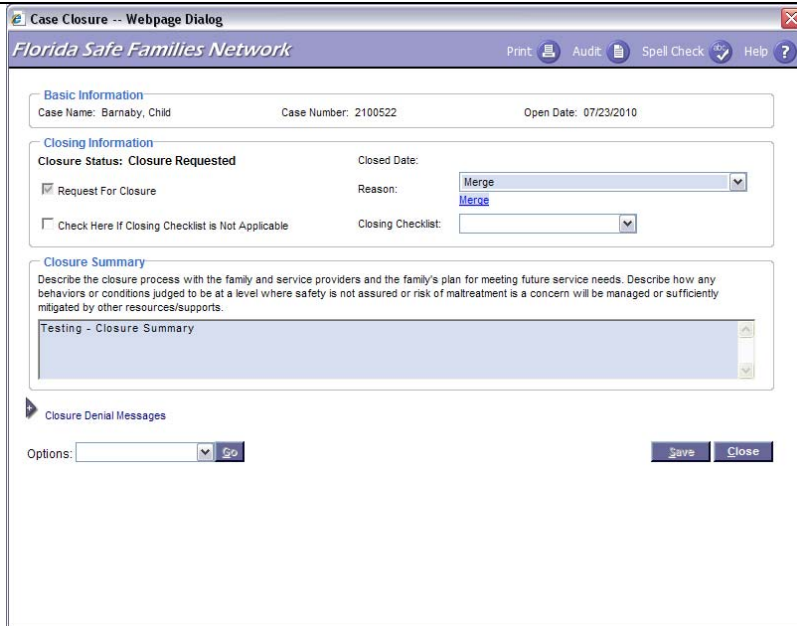
8. Select the **Request for Closure** checkbox.

9. Document the **Closure Summary**.

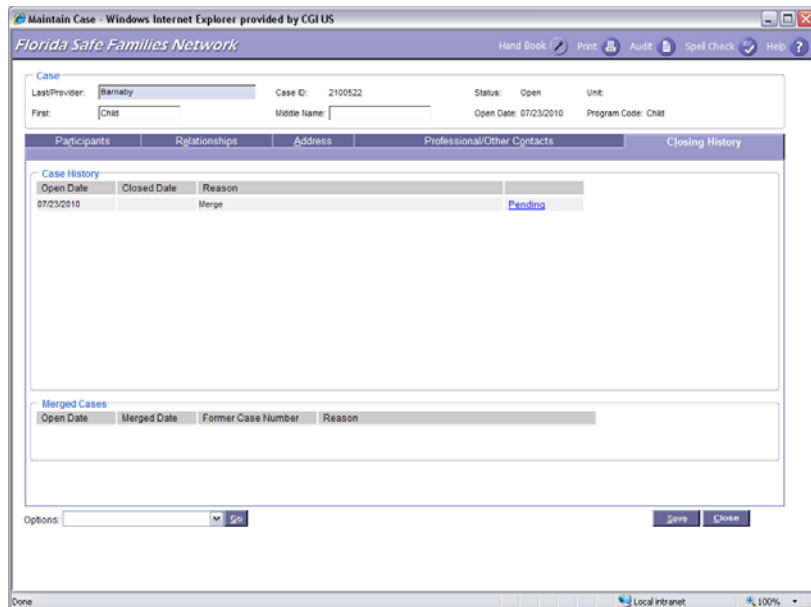
10. Click the **Save** button.

11. Click the **Yes** button on the FSFN dialog prompt.

Upon selecting 'Yes,' the case closure batch process is triggered. If 'No' is selected, the batch is not triggered. In the event the process is initiated in error, the user can select 'Closure Disrupted' from the Reason dropdown, launch the Approval page, select 'Not Approve,' and, upon saving, the Case Closure page will be frozen and the



CLOSING HISTORY TAB



CASE CLOSURE PAGE

batch and merge process will be stopped. It is important to note that, although the Case Closure page becomes frozen in this instance, the Maintain Case page remains modifiable. To maintain data integrity and retain documentation, the Case Closure Request will be displayed on the Closing History tab with a reason of 'Closure Disrupted' and the associated hyperlink will be 'Historical.' When the user needs to submit another case closure, he/she simply selects 'Submit Case Closure Request' from the Options dropdown and follows the standard process. Once the case closure for reason of 'Merge' is accepted by the batch and the case closure request is approved by the supervisor, the system merges the two cases. The system also automatically transposes the narrative that is documented in the 'Closure Summary' narrative text field into a case note. The Case Note is given a note type of 'Case Merge,' contains the narrative captured in the 'Closure Summary' on the Case Closure page, and has a 'Start Time' of whenever the supervisory approval occurred.

12. Click the **Close** button.

13. Notice the new record displayed in the Closing History group box with a **Pending** hyperlink.

14. (Assume the batch has accepted the Case Closure request) Select the **Accepted** hyperlink to launch the Case Closure page.

Once the batch accepts the Case Closure request the Pending hyperlink will be displayed as an Accepted hyperlink.

APPROVAL HISTORY PAGE

Worker Name	Status	Date	Action
AMY JENKS	Initial	09/20/2010 12:45 AM	Initial

DESKTOP

15. Select **Approval** from the Options dropdown and click the **Go** button.

16. Select the **Approve** radio button and click the **Continue** button.

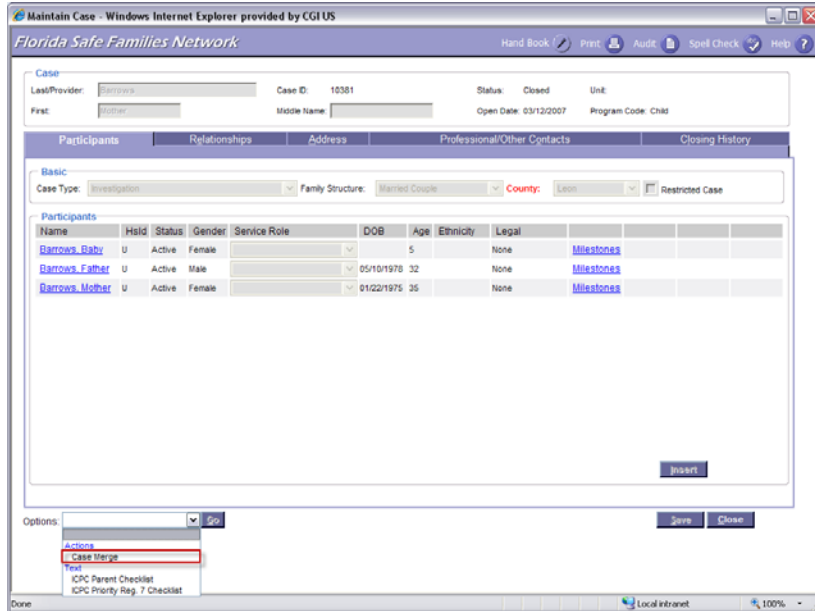
17. Click the **Save** and then **Close** button on the Case Closure page.

Once the Case Closure request is approved by the Supervisor the case will be closed and merged into the selected destination case.

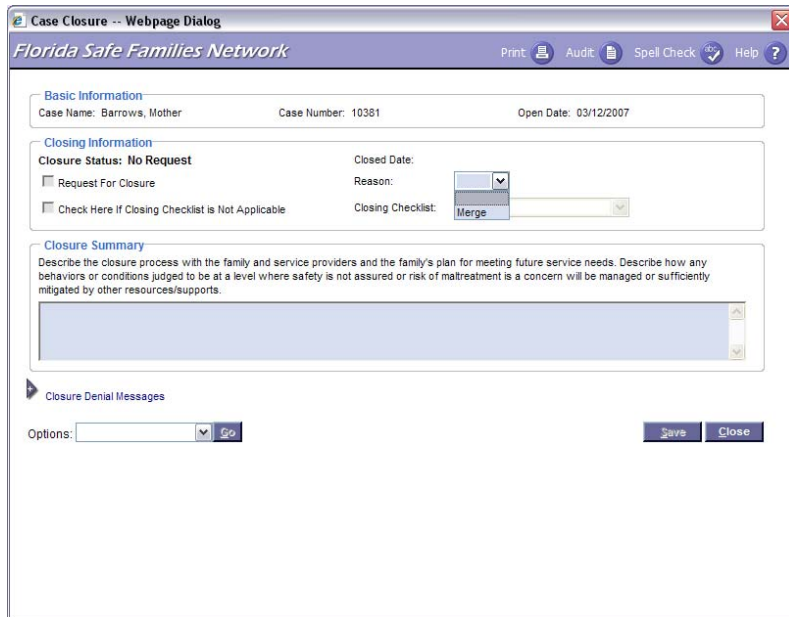
Cases with a Case Type of 'Post Adoption Services' cannot be merged.

If the same participant exists in both cases and has a Trust Account in both cases, the cases cannot be merged.

MAINTAIN CASE PAGE



CASE CLOSURE PAGE



4. Select **Case Merge** from the Options dropdown and click the **Go** button.

5. Select **Merge** from the Reason dropdown.

6. Select the **Merge** hyperlink.

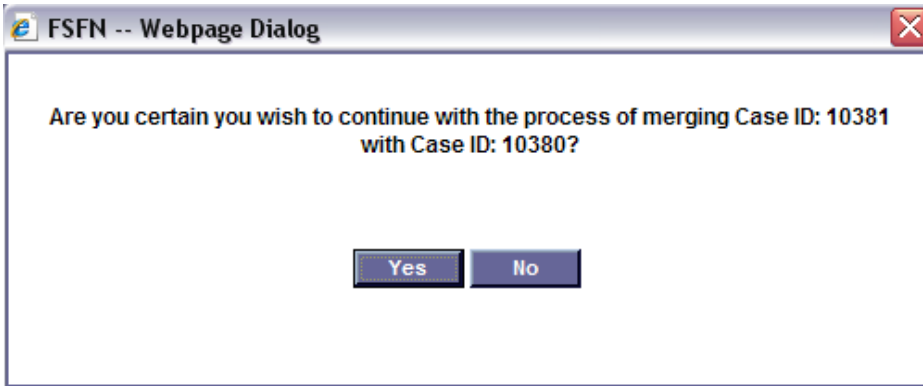
7. Enter the Search appropriate search criteria and click the **Search** button.

8. Select the radio button for the appropriate destination case to merge the current case into and select the **Continue** button.

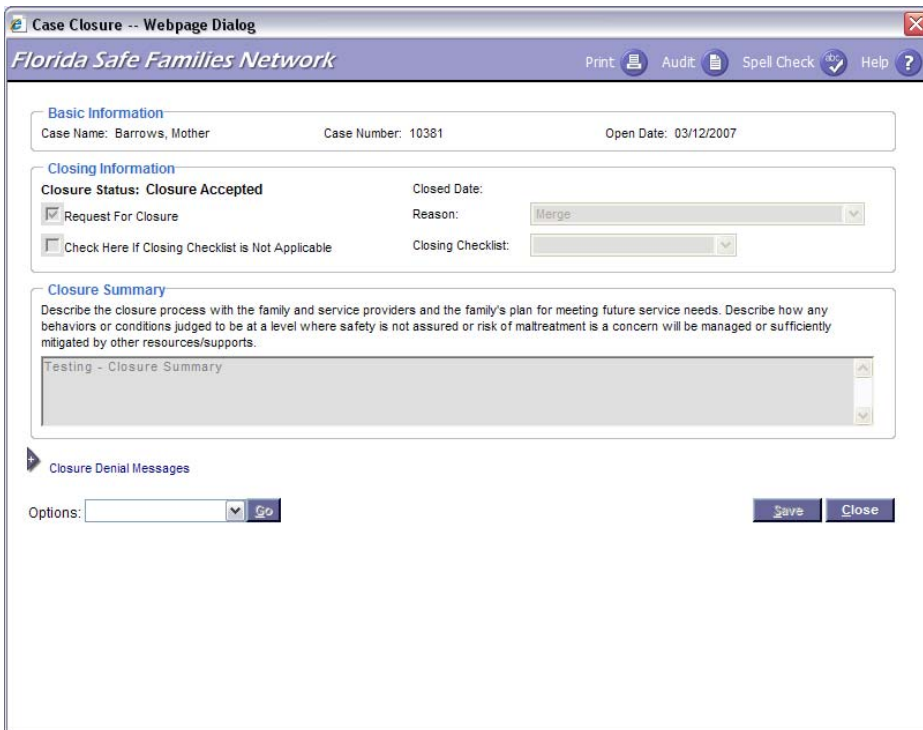
9. Document the Closure Summary and click the **Save** button.

A closed case can be merged into either an open or closed case.

FSFN DIALOG PROMPT



CASE CLOSURE PAGE



10. Select **Yes** on the FSFN dialog prompt.

Upon selecting the 'Yes' button, since the case being merged is already closed, the case does not have to go through the batch acceptance process. Therefore, once the Yes button is selected the merge process occurs immediately and does not require supervisory approval.

Upon selecting Save, when merging a closed case into an open or closed case (Case Merge from Options dropdown), the system will automatically transpose the narrative documented in the 'Closure Summary' text field into a case note. The Case Note will be given a note type of 'Case Merge,' contain the narrative captured in the 'Closure Summary' on the Case Closure page, and have a 'Start Time' of whenever the Save was successfully initiated and processed.

Cases with a Case Type of 'Post Adoption Services' cannot be merged.

If the same participant exists in both cases and has a Trust Account in both cases, the cases cannot be merged.

11. Click the **Close** button.
