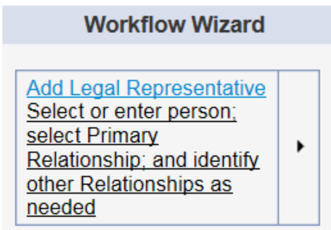
WV Online Case Management (CM) Pilot Project *Revised Mar. 13*
Job Aid: Case Relations

Please see the Orientation Guide for an introduction to Case Relations in Section 1.B.

A. Add Legal Representative

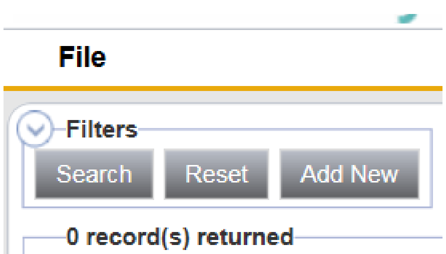
The Demographics page includes the field 'Legal Representative' with lookup values (Yes, No). When the user selects 'Yes' and saves the record, the system triggers a Workflow Wizard as shown below.



To open the tickler, the user clicks on the hyperlink 'Add Legal Representative' or selects 'Open' in the fly-out menu. Then the system displays the list view of the Case Relations page. The user can select an existing Relation record or enter a new one.

B. Add Relations

To add a new record, the user selects the 'Add New Case Relations Search' in the File menu. The search function is system-required, but the filters are hidden to bypass that requirement. To proceed, the users clicks on the Search button (to show 0 records) and then the Add New button to display the page.



BoSS decided to bypass the search as a work-around to protect confidentiality of Participant and Relations records. Users can only view Relations in their Participant records. Please note that, if a Relation is entered on multiple Participants (e.g., physician), the system will include duplicate records for that Relation.

C. Relations in Clinical Documents

Case Managers enter Relations in the Person-Centered Assessment – Section 1 (CM) and Service Plan – Supplement. Currently, the WellSky system cannot link the data entered in the Case Relations page to Clinical Documents, so Case Managers enter the names of Relations manually as free-text. There is a system enhancement in progress to simplify entry using a lookup function. In the meantime, users can facilitate data entry by saving the Word Merge documents for Case Relations to copy/paste information.