

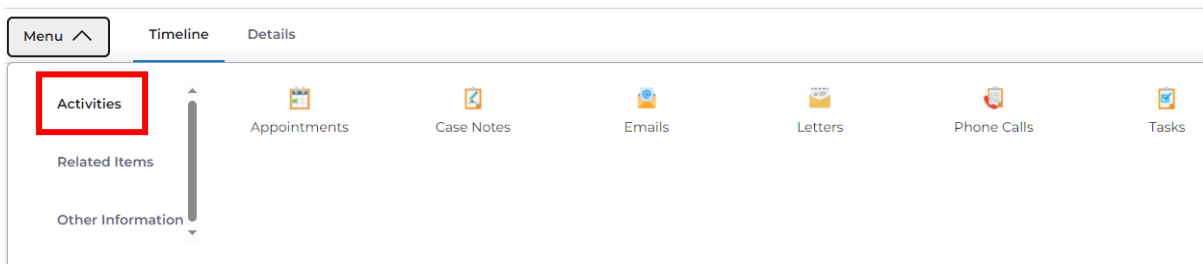


Case Closure Process Guide V1.1

Document	Closure Guide
Purpose	How to close a case
Version	V1.1
Owner	ICT Business Transformation Team / System Support Team
Last Updated	13/02/2024

Closure Process

1. Before proceeding with the closure, it is important to perform checks to ensure that all necessary requirements are met. Such as ensuring there is a closing summary on a task note. Please follow these steps:
 - a. Activities: Check that all activities are marked as completed. To do this, go to Menu > Activities and review each activity type to ensure they are set to the "Completed" status.



TEST, Tom (Id: 448365) Person Record

Pronouns:
Preferred Name:

Menu Timeline Details

Tasks

Related Records

<input type="checkbox"/>	<u>Subject</u>	<u>Due</u> ⌵	Status	<u>Regarding</u>
<input type="checkbox"/>	T/C - Carers did not attend	23/11/2023 13:17:00	Open	Test, Tom - (03/05/1995) ...
<input type="checkbox"/>	Appointment needed with Tom	27/10/2023 11:00:00	Open	Test, Tom - (03/05/1995) ...
<input type="checkbox"/>	T/C - From Tom update about medica...	26/09/2023 00:00:00	Open	Test, Tom - (03/05/1995) ...
<input type="checkbox"/>	T/C - Question about package of care	04/08/2023 10:44:00	Completed	Test, Tom - (03/05/1995) ...
<input type="checkbox"/>	Case has been allocated	30/05/2023 10:34:42	Open	Test, Tom - (03/05/1995) ...
<input type="checkbox"/>	T/C Call from Carer	14/04/2023 14:51:00	Open	Test, Tom - (03/05/1995) ...
<input type="checkbox"/>	Case has been allocated	14/04/2023 11:22:00	Open	Test, Tom - (03/05/1995) ...

PROCESS - CLOSURES

- b. Forms: Verify that all forms are closed. Go to Menu > Related Items > Forms (Case) and ensure that all forms associated with the case are marked as closed. **If any forms say completed this means it requires a managers sign off, once this has been done closure can continue.**

TEST.Tom (Id: 448365) Person Record Born: 03/05/1995 (28 Years) Gender: Male NHS No: [dropdown]

Pronouns:
Preferred Name:

Menu ^ Timeline Details

Activities **Related Items** Other Information

Actions Adult Safeguarding Attachments Audit Conferences/Meetings Deprivations Of Liberty **Forms (Case)** Involvements Involvements History

Joint Case Members Status History

TEST.Tom (Id: 448365) Person Record

Pronouns:
Preferred Name:

Menu v Timeline Details

+ [grid icon] [person icon] [trash icon] **Forms (Case)**

WMDC Related Forms [dropdown]

<input type="checkbox"/>	<u>Due Date</u>	<u>Form Type</u>	<u>Start Date</u> [dropdown]	Status
<input type="checkbox"/>	13/11/2023	Adult Care and Support Plan	09/11/2023	In Progress
<input type="checkbox"/>	13/12/2023	Occupational Therapy Conversation Record	03/11/2023	In Progress
<input type="checkbox"/>	25/10/2023	Section 117 statement of needs	24/10/2023	In Progress
<input type="checkbox"/>		Adult Safeguarding Plan	19/10/2023	In Progress
<input type="checkbox"/>	21/09/2023	Deputy and Estates Team Referral Form	14/09/2023	In Progress
<input type="checkbox"/>	08/09/2023	CoP - One Off Cash Request Form V1	07/09/2023	In Progress
<input type="checkbox"/>	16/06/2023	Adult Conversation Record	09/05/2023	In Progress
<input type="checkbox"/>	19/04/2023	Adult Care and Support Plan Review	18/04/2023	In Progress

PROCESS - CLOSURES

- c. Deprivations of Liberty: Make sure that any Deprivations of Liberty have an actual authorization end date and that the specified time has passed. Access Menu > Related Items > Deprivations of Liberty to verify this.

The screenshot shows the 'Person Record' interface for a user named 'TEST Tom (id: 448365)'. The user's details include 'Born: 03/05/1995 (28 Years)', 'Gender: Male', and 'NHS No:'. The interface has a 'Menu' button and three tabs: 'Timeline' (selected), 'Details', and 'Activities'. A sidebar on the left contains 'Related Items' (highlighted in red) and 'Other Information'. The main content area displays a grid of icons for various functions: 'Actions', 'Adult Safeguarding', 'Attachments', 'Audit', 'Conferences/Meetings', 'Deprivations Of Liberty' (highlighted in red), 'Forms (Case)', 'Involvements', and 'Involvements History'. Below the grid, there are icons for 'Joint Case Members' and 'Status History'.

Authorisation Status

Granted

Start Date of Authorisation

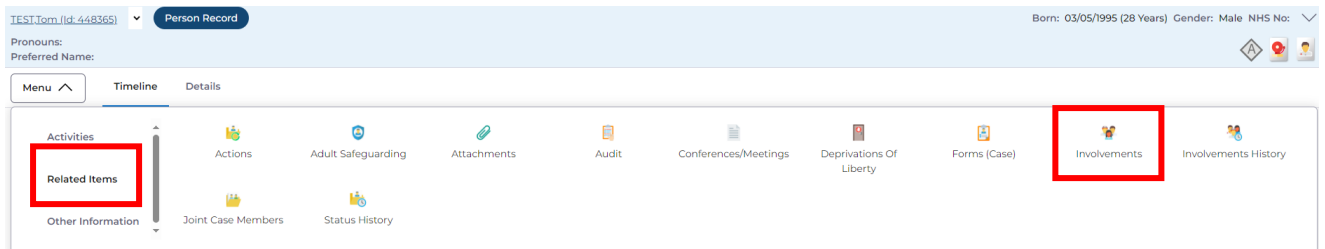
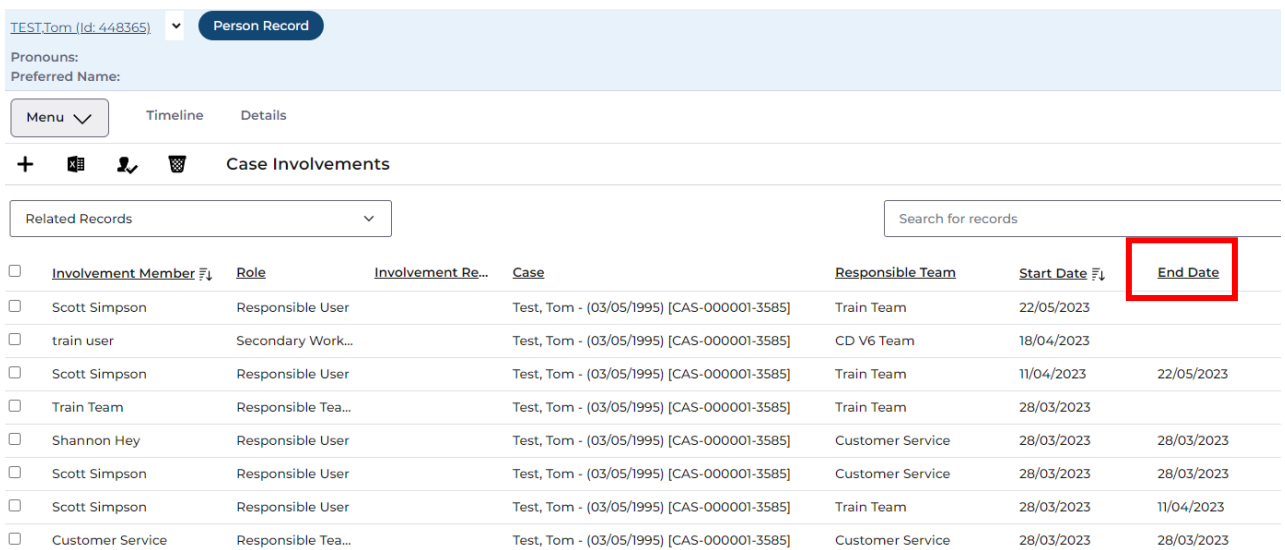
26/11/2023

Actual Authorisation End Date

27/11/2023

PROCESS - CLOSURES

- d. Involvements: If there are any secondary worker/team involvements they will need an end date to be added. If the involvement is not for your team, please **stop this process** and do not close the case. Assign the case to the other team so that they can finish any work they need to do.

The screenshot shows the 'Case Involvements' table. The 'End Date' column is highlighted in red. The table contains the following data:

<input type="checkbox"/>	Involvement Member	Role	Involvement Re...	Case	Responsible Team	Start Date	End Date
<input type="checkbox"/>	Scott Simpson	Responsible User		Test, Tom - (03/05/1995) [CAS-000001-3585]	Train Team	22/05/2023	
<input type="checkbox"/>	train user	Secondary Work...		Test, Tom - (03/05/1995) [CAS-000001-3585]	CD V6 Team	18/04/2023	
<input type="checkbox"/>	Scott Simpson	Responsible User		Test, Tom - (03/05/1995) [CAS-000001-3585]	Train Team	11/04/2023	22/05/2023
<input type="checkbox"/>	Train Team	Responsible Tea...		Test, Tom - (03/05/1995) [CAS-000001-3585]	Train Team	28/03/2023	
<input type="checkbox"/>	Shannon Hey	Responsible User		Test, Tom - (03/05/1995) [CAS-000001-3585]	Customer Service	28/03/2023	28/03/2023
<input type="checkbox"/>	Scott Simpson	Responsible User		Test, Tom - (03/05/1995) [CAS-000001-3585]	Customer Service	28/03/2023	28/03/2023
<input type="checkbox"/>	Scott Simpson	Responsible User		Test, Tom - (03/05/1995) [CAS-000001-3585]	Train Team	28/03/2023	11/04/2023
<input type="checkbox"/>	Customer Service	Responsible Tea...		Test, Tom - (03/05/1995) [CAS-000001-3585]	Customer Service	28/03/2023	28/03/2023

2. Once you have verified these areas, return to Details > Assignment Information > Case Status and change it to the relevant option. Selections may prompt additional fields for you to review and provide a reason. After making the necessary changes, save the record, and it will be automatically sent to your manager for authorization.

PROCESS - CLOSURES

Assignment Information

Case Status*	Closure Requested	x	Q	Close Date*	29/11/2023	📅	13:17	🕒
Case Priority	Priority 3 - Medium	x	Q	Closure Reason*				Q
Responsible User	Scott Simpson	x	Q	Closure Accepted By				Q
Responsible Team*	Train Team		Q	Archive Date				📅

Version Control

Version	Change	Author	Date
V1	Initial Start	SH	29/11/2023
V1.1	Changed guidance around ending secondary involvements	SCJ	13/02/2024