

# CLOSING A WAITLISTED OR OPEN CASE

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There are 5 different scenarios that would require us to **close/remove** a case:

## **Possible scenarios for Open cases**

1. The client has **Graduated** from the program (when their risk is low enough such that they can remain in the community without needing to be supervised).
2. **Services are withdrawn** for the client and they are taken back into custody (either because of too many breaches or because their level of risk/intervention has changed such that we can no longer manage them in the community).
3. The client has **Absconded**.

## **Possible scenarios for Waitlisted cases**

4. The client is **Refused** for programming (JHS decision based on our assessment)
5. The client is accepted for programming by JHS but **Not approved** by the CBSA/IRB.

**In all cases**, the reason for removing/closing a case must be tracked.

**To do so**, follow the instructions below.....



## 1. RECORDING THE CORRECT DISCHARGE TYPE

1. Go to the case in question (either by selecting it from your **Caseload** or **Waitlist**).
2. On the **Intake Form** page, scroll down to the “**Add new Case Statistical Info**” section and click on the blue hyperlink for this section.
3. Once on the next page, find the “**Discharge Type / Level**” field and select the applicable option from the dropdown menu.

**Note:** If you are closing a case because the client has graduated, you will need to specify which Level of Intervention they were categorized as at time of graduation (i.e. Low intervention, Medium intervention, High intervention or High Needs).

4. When the appropriate option is selected, click **Add New** to add this new Case stat to the client’s file (see image on next page).
5. When you are back on the Intake Form page, you should see the information updated in the **Case Statistical Info** section.

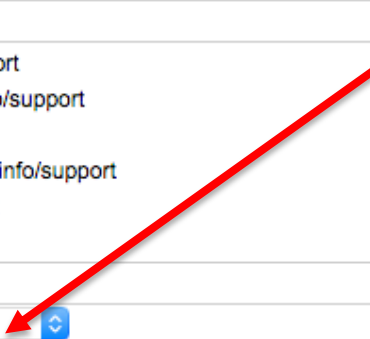
### Add New Case Statistical Info

**#2] John Test [# 2 ]John Howard Montreal**

IHSCANADA's Worker: **Kassandra Roy**

Current Status: **Open** Status Date: **2018-06-28**

Referral Source :	CBSA
Level of Intervention (at Intake) :	High intervention
Services Received :	<input checked="" type="radio"/> Yes <input type="radio"/> Not Set
Select all that Apply :	<input checked="" type="checkbox"/> A&D counseling and support <input type="checkbox"/> Child-related or Family info/support <input type="checkbox"/> Compliance monitoring <input type="checkbox"/> Housing and Employment info/support <input checked="" type="checkbox"/> Linkages to health support <input checked="" type="checkbox"/> Mental health assistance
Complied with Conditions :	No
Change in Level of Intervention (in Service) :	No Change
Discharge Type / Level :	Service withdrawal
<input type="button" value="Add New"/> <input type="button" value="Go Back"/>	



**#2] John Test [# 2 ]John Howard Montreal**

IHSCANADA's Worker: **Kassandra Roy**

Current Status: **Open** Status Date: **2018-06-28**

Once the correct Discharge Type has been recorded, you can now close the case. To do so, follow the instructions below.

## 2. CLOSING AN OPEN CASE OR REMOVING A WAITLISTED CASE

1. Go back to the targeted case's Intake Form and scroll down to the **Program & Worker** section.
2. Click on the blue hyperlink for the **Program** name (eg. John Howard Ottawa).
3. Go to the **Action** section and click the dropdown menu to view the available options.

### If the case is an Open case:

The only available option should be “**Discharge**”. Select **Discharge**, type the correct Date of Discharge and click **Save action**.

### If the case is a Waitlisted case:

You should see two options:

- 1) Open
- 2) Remove

As long as either of the two possible scenarios for closing a **waitlisted** case apply, select **Remove**. This will remove the client from the Waitlist but since we have entered the reason for discharge in the Case Stat section, the removed client will still show up in our monthly reports, **which is essential!**

**Case Action**

Client Short Information	
Client Name	Jane Test
Birth Date	0000-00-00 Not Set
Address	Montreal, QB
Gender	Female
Phone 1	

Program & Worker				
Program	Worker	Status	Status Date	P.D. Date
John Howard Montreal	Kassandra Roy	Wait	2018-Jun-22	PDD

Date	Action	Status	Author	Comments	Real Date
2018-Jun-22	Refer	Wait	Kassandra Roy	<a href="#">Show Data</a>	2018-Jun-28 12:13:42

Action	Remove
Action Date	2018-06-28
Comments	

[Save action](#)

**[#3] Jane Test** [# 3 ]John Howard Montreal  
JHSCANADA's Worker: **Kassandra Roy**  
Current Status: **Wait** Status Date: **2018-06-22**

**Notice** that this is a Waitlisted case, which is why “Remove” is an available option.