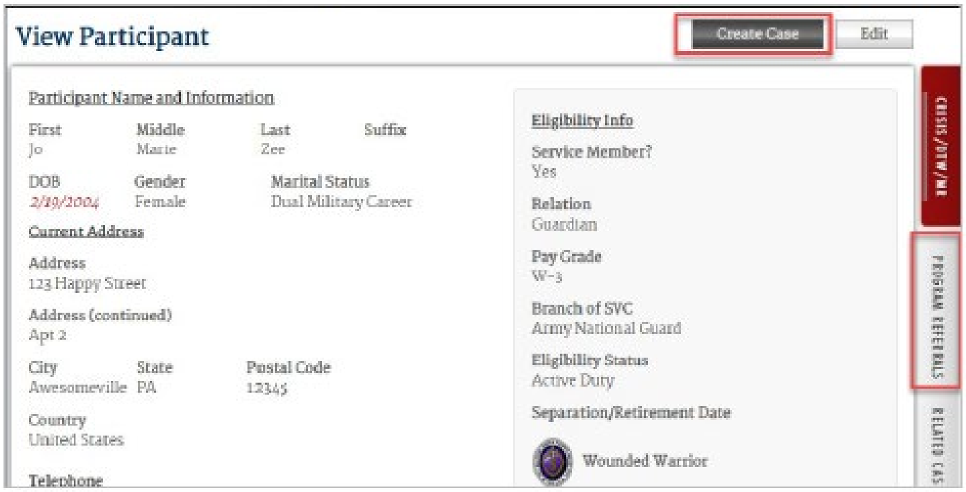
7.3. Create a Non-Medical Counseling Case

A case can be created for a Participant while viewing their Participant record or one of their cases. From the Participant record, you can select "Create Case" to open the navigation list of Case Types to choose from. If viewing a case, simply select the "Program Referrals" tab on the right of your screen.



Select "Non-Medical."

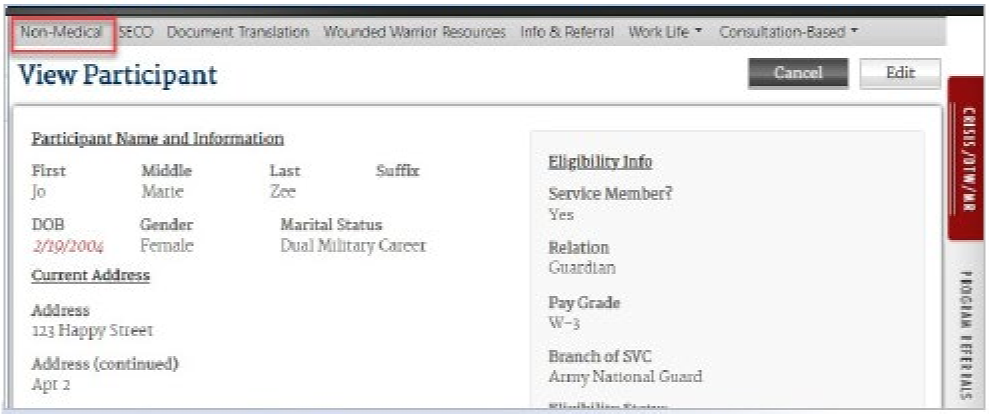


Figure 61

You first must explain the Limits of Confidentiality to the Participant. You will find script prompts in some areas of the page for you.

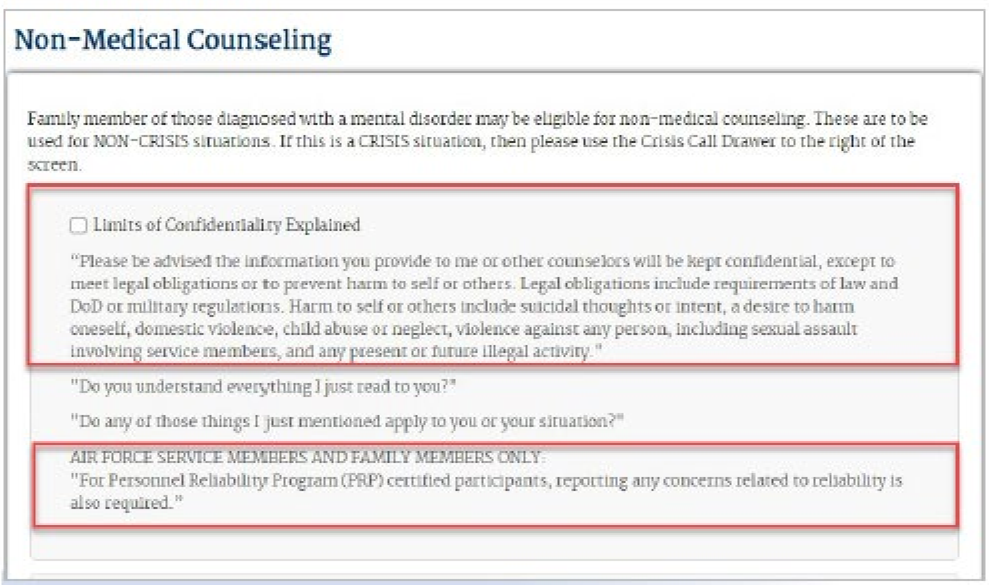


Figure 62

If a Participant is a minor, you will need to enter "Parent/Guardian Info." You can see a "Minor Participant" icon in the "Participant Overview," as well as name(s) of their Parent/Guardian(s).

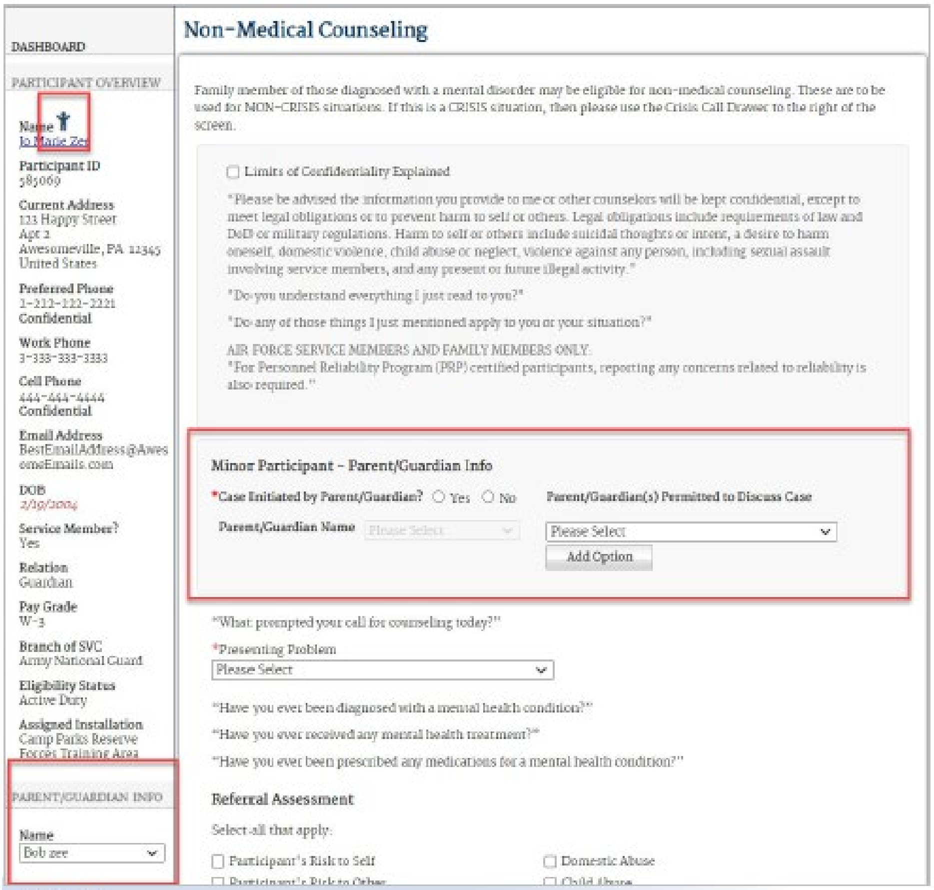


Figure 63

Was the "Case Initiated by Parent/Guardian?" If so, select the name of the Parent/Guardian initiating the case. Also, select and add all "Parent/Guardians Parent/Guardian(s) Permitted to Discuss Case."

Figure 64

You will make selections based on your "Referral Assessment" of the Participant. Once you understand the reason for the call, select the appropriate "Presenting Problem" from the list. This will trigger different workflows depending on the answer. If the reason for the call is "Outside Scope of MOS," you will continue with creating an "Outside Scope for Non-Medical Counseling" case. If any other "Presenting Problem" is selected, you will move forward with creating an "In Scope for Non-Medical Counseling" case.

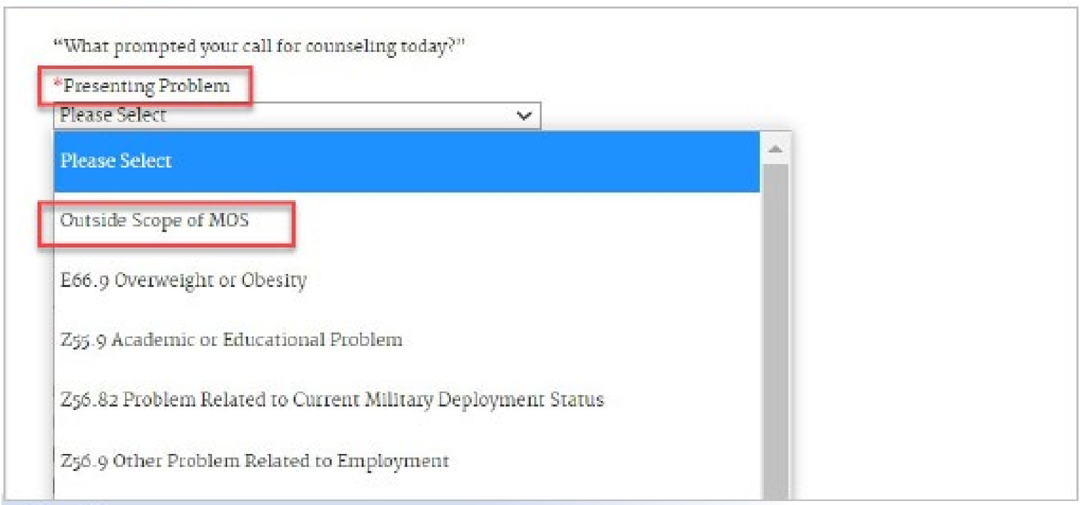


Figure 65

7.3.1. CREATE AN OUTSIDE SCOPE FOR NON-MEDICAL COUNSELING CASE

When creating a Non-Medical Counseling case, you may determine it is Outside Scope for Non-Medical Counseling.

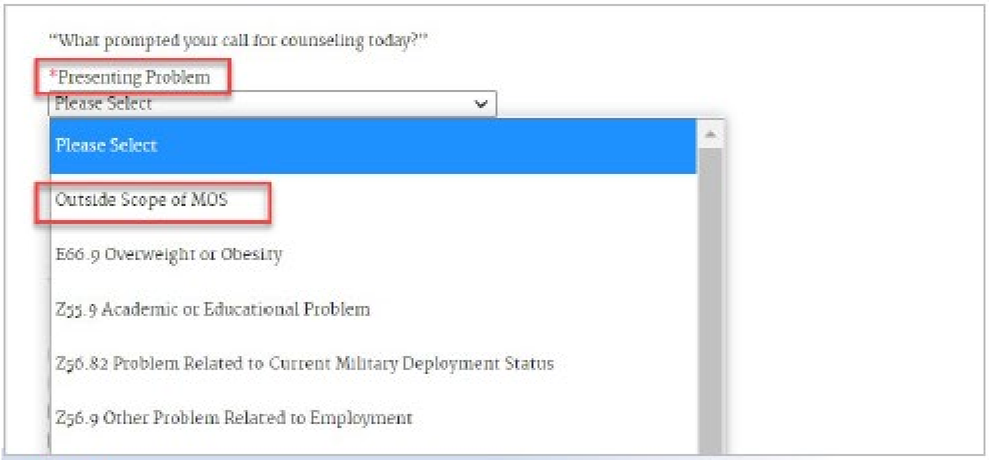


Figure 66

You then will select agencies in which to provide Referrals for the Participant.

If the call is related to any "Tracked Event(s)" in the system, you will select those as well.

Figure 67

You must enter the "Handoff Type" and "Deployment Status." There are additional fields you should answer if possible.

Detail any Handoff Notes to help other users understand the circumstances and/or needs of the Participant. Mark the box for "Urgent" cases.

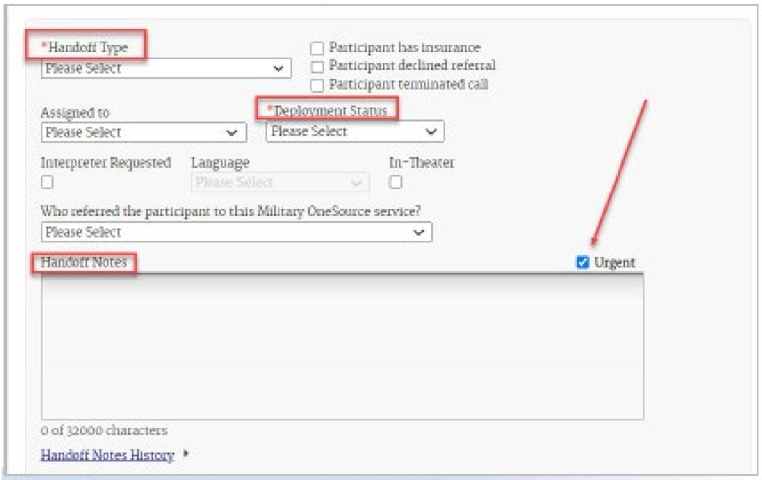


Figure 68

Lastly, you must offer a Follow-Up appointment and enter the details in the form.

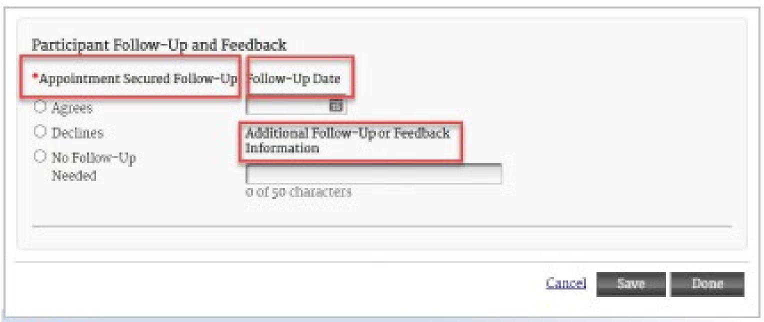


Figure 69

Click "Save" to save and review the form. Click "Done" to save and return to the Participant record. The newly created case can be found in the Participant's "Related Cases" when viewing the Participant, with the most recently created case on top.

7.3.2. CREATE AN IN SCOPE FOR NON-MEDICAL COUNSELING CASE

When [creating a Non-Medical Counseling case](), you may determine it is In Scope for Non-Medical Counseling.

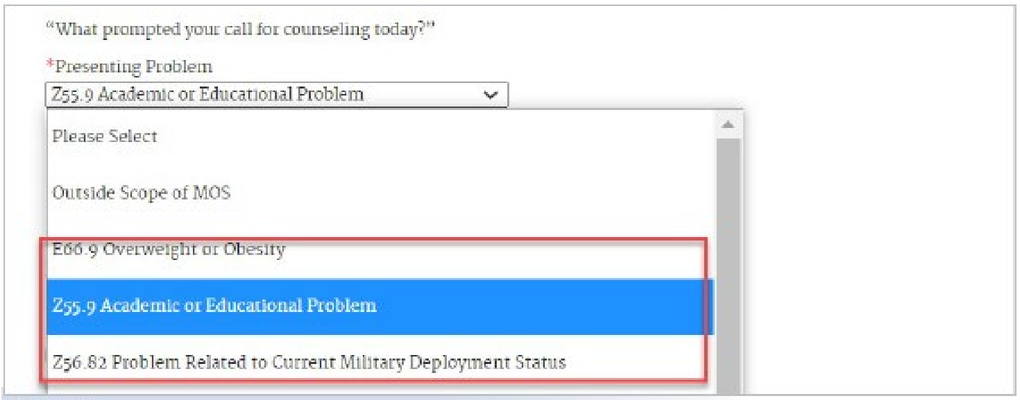


Figure 70

You will then enter the Participant's "Counseling Preference," "Type of Counseling" needed, and whether the "Referral Type" is "MFLC" or "MOS Network."

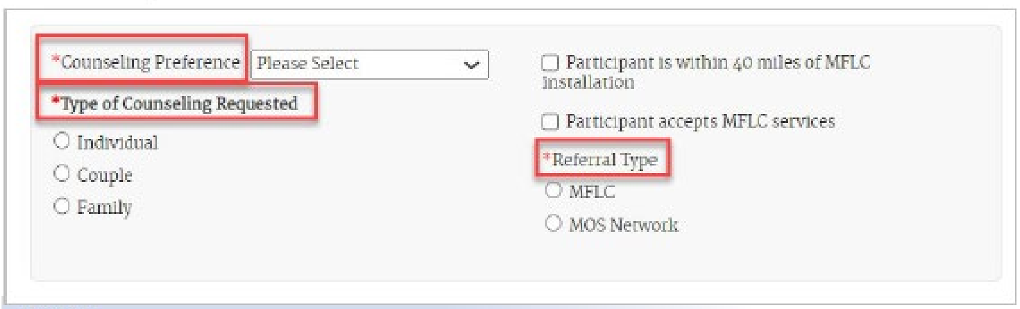


Figure 71

If it is a "MOS Referral" for couple or family counseling, you will be able to add and/or associate family members to participate in the counseling sessions.

"MOS Referrals" also require a "Reason Requesting Counseling" and provide a way to enter provider information.

You can track in the system if a "Participant prefers not to be contacted for follow-up," as well as if you were "Unable to schedule for appointment within 3 business days."

If the call is related to any "Tracked Event(s)" in the system, you will select those next.

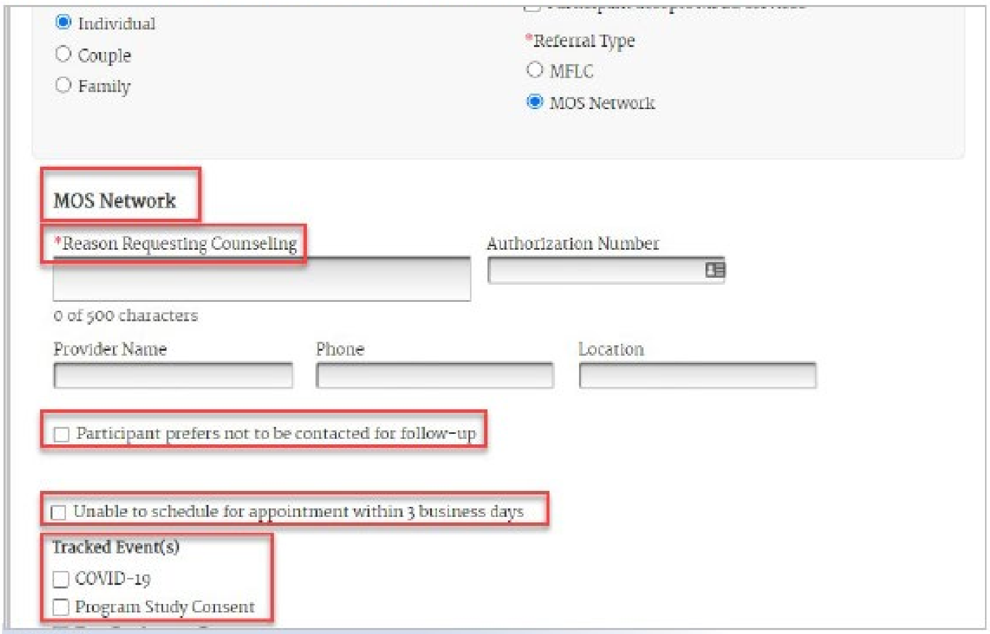


Figure 72

You must enter the "Handoff Type" and "Deployment Status." There are additional fields you should answer if possible.

Detail any Handoff Notes to help other users understand the circumstances and/or needs of the Participant.

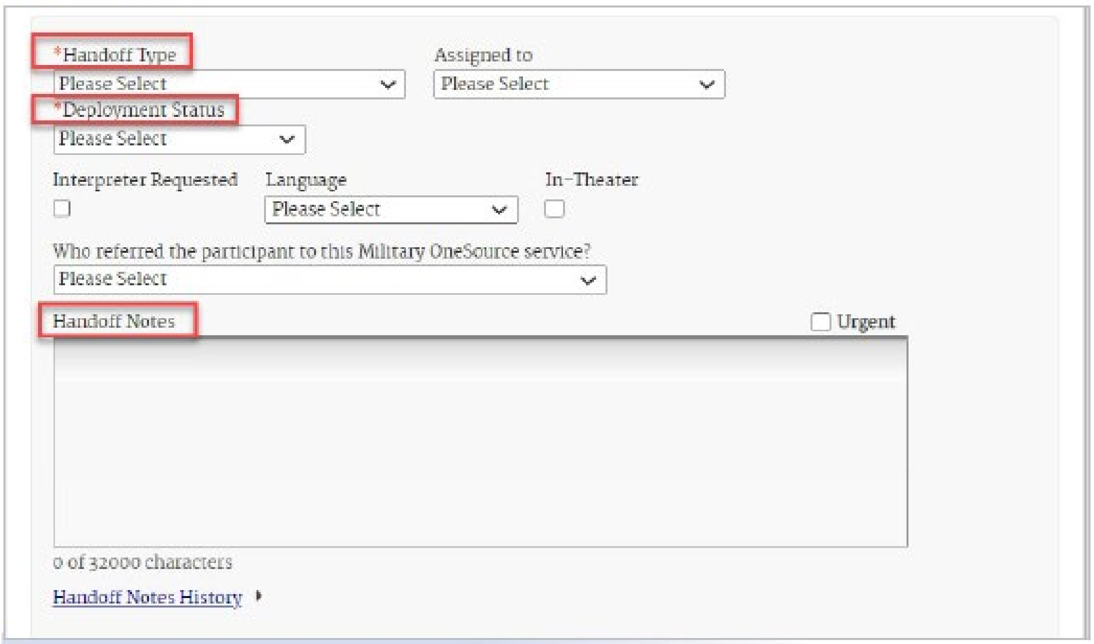


Figure 73

Lastly, you must offer a Follow-Up appointment and ask if the Participant would be willing to provide "Satisfaction Feedback." Depending on their answers, you may be required to enter additional information.

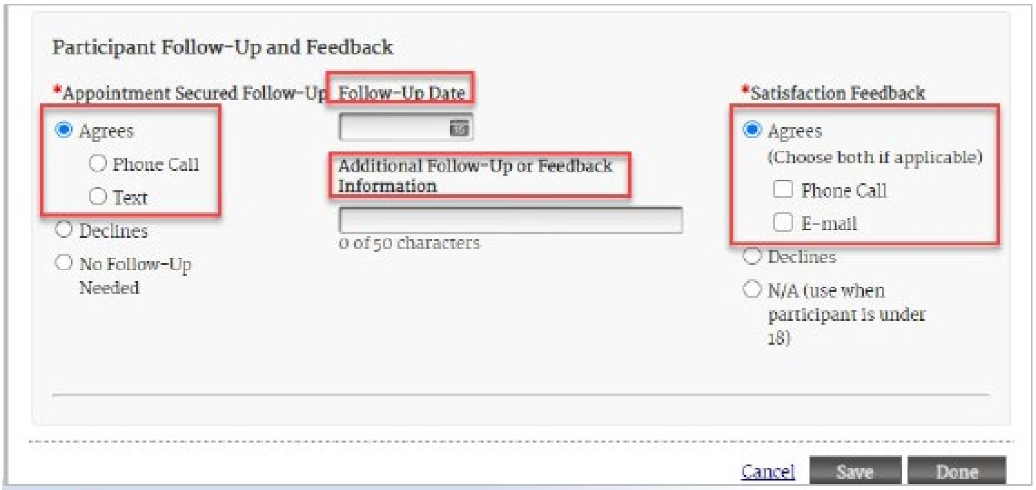


Figure 74

Click "Save" to save and review the form. Click "Done" to save and return to the Participant record. The newly created case can be found in the Participant's "Related Cases," with the most recently created case on top. You will find information on how to manage Non-Medical Counseling cases here.

7.4. Create a SECO Triage Case

A case can be created for a Participant while viewing their Participant record or one of their cases. From the Participant record, you can select "Create Case" to open the navigation list of Case Types to choose from. If viewing a case, simply select the "Program Referrals" tab on the right of your screen.

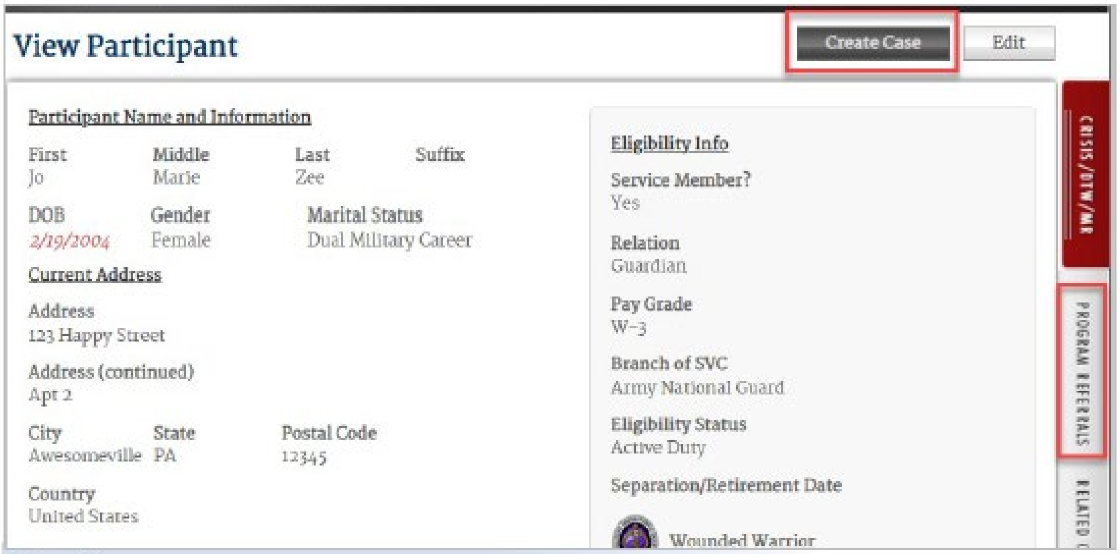


Figure 75

Select "SECO."

Figure 76