



# **MMEEx User Manual**

## **Case Management**

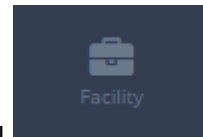
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[View headspace workflows](#)

# Case Management

Case Management is an extension of the mental health module with a user being able to manage multiple cases from one location.



You can access the Case Management module from the Facility sub-menu

**Accessing from the Case Management module** will display all Cases for the organisation. The view can be sorted by Organisation or by user.

This can be used as a Case Management Worklist.

## Case Management

Create Case
**Show Cases for** Ms Sarah Baker
▼ Search

Search
Clear

Current Cases
Export

No Current Cases

Closed Cases
Export

No Closed Cases

Clicking on a case will open that patient's record at the Case Details Page in the Mental Health Module

**Accessing from the Patient Record** will display that patient's cases only. Patients can have more than one case with either open or closed status.

## Creating a Case

### Case Management

Create Case
**Show Cases for**

Current Cases
Export

To create a new Case, click on **Create Case**

Select your patient via the patient search.

Categorise the case and complete the required fields.

Save
Cancel

Case Details

<b>Category</b>	Select ▾		
<b>Case Opened</b>	28/05/2018		
<b>Case Description</b>			
<b>Allocated</b>	<input type="checkbox"/>		

Case Users

Add  

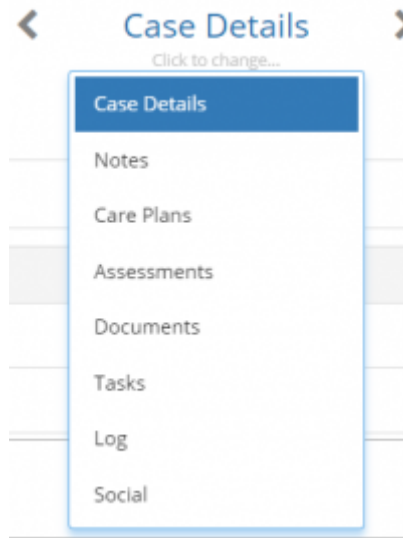
No user added

Additional Details

<b>HAPI / MMEx Completed</b>	<input type="checkbox"/>	<b>Registered onto E-Headspace</b>	<input type="checkbox"/>
<b>Phase</b>	▾	<b>Care Plan Signed By YP</b>	▾

Allocated users (Case Managers) to the case. This will make the case visible in their worklist.

Once a case is opened, you will use the Navigator to scroll through the different tabs available.



## Case Details

**Case Details**

<b>Category</b>	Waitlist
<b>Case Opened</b>	09/06/2016
<b>Case Description</b>	paranoia - believes she must kill 23 people in order to survive and that her every move is being watched. <small>(Old value: paranoia - believes she must kill 23 people in order to survive and that her every move is being watched.)</small>
<b>Allocated</b>	<input checked="" type="checkbox"/>
<b>Closed?</b>	<input type="checkbox"/>
<b>Date - Case Closed</b>	
<b>Reason closed</b>	Select

**Case Users**

[Add](#)

User	Category	
Mr Headspace User 1 (Headspace Test Org)	Case Manager	<a href="#">Delete</a>

**Additional Details**

<b>HAPI / MMEx Completed</b>	<input checked="" type="checkbox"/>	<b>Registered onto E-Headspace</b>	<input checked="" type="checkbox"/>
<b>Phase</b>	Early	<b>Care Plan Signed By YP</b>	Not yet – no care plan yet

**Referrals** (To create a referral, Referred To field must be filled.)

[Add New Referral](#)
Display: Incoming Referrals
Filter By: Current

Referral Type	Priority	Date Referred	Referred By	Referred To	Category	Date Responded	Status	Response
Standard	Urgent	9/06/2016		Mr Headspace Org Admin (Headspace test org)	External			

You can update the Case details and save any changes by clicking on Update.

Click on **Start an Assessment** to commence a new [Mental Health Assessment](#).

## Notes

The Notes Tab is a location to enter Progress Notes directly from the Case Management module.

←
Notes
→
[Refresh](#)

Click to change...

**New Progress Note**

[Save](#)
[New Note](#)
[Clinical Handover Record](#)
[Show Details](#)

**Date:** 28/05/2018
   
**Privacy Level:** Mental Health Only

**Presenting Complaint** Select One

**Reason for Contact** Select One

**Insert Template**
ASPEN TEST

[Insert](#)
[Draw Sketch](#)

Notes (F11 for full screen)
[Recent Patient Actions](#)

## Care Plans

A duplicate of the main Care Plans Tab of the Clinical Record. Mental Health care plans can be added and managed from here.

< **Care Plans** >  
Click to change...
Refresh

Name	Type	Practitioner	Created	Diagnosis	Status	
ANTE NATAL CARE	Management	Mr Headspace User 1 (Headspace Test Org)	12/11/17		Current	<input type="button" value="Archive"/>

## Assessments

Add new Assessments and displays previous Assessments completed.

< **Assessments** >  
Click to change...
Refresh

Case Only
  Show All

No Records Found

## Documents

A duplicate of the Documents tab in the Clinical Record, you will find previously completed assessment forms saved here.

< **Documents** >  
Click to change...
Refresh

**Filter By**
 All
  Documents
  Letters
  Images
  Forms

**Document Category**

Right click table for options

Name of Document	Added By	Date	Last Edited Date/Time	
IHPO Daily Entry	Ms Sarah Baker	24/01/18	24/01/2018 12:36:11 PM	

Upload new documents by clicking on the **Upload File** button. See [here](#) for further instructions.

## Tasks

View all tasks related to this patient.

< **Tasks** >  
Click to change...
Refresh

[Show Advanced Filters](#)

Action	Reason	Status	Date	Patient	Assigned To		
Recall Patient	Tetanus Vaccination	Pending	11/08/2016	<a href="#">Everdeen, Katniss</a>	Headspace User 2 (Headspace Test Org)	<input type="button" value="Edit"/>	<input type="button" value="Archive"/>

Tasks may be filtered by

- All
- Completed
- Not Completed
- Upcoming

Tasks can be used to assist with managing client follow up.

## Logs

□ The Logs tab displays a log of patient record events.

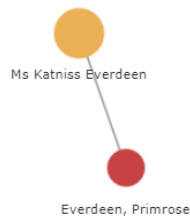


Patient Log

Event	Assessment	Date	Creator	Details
Patient Record Open		28/05/2018	Mr Headspace Org Admin (Headspace test org)	
Patient Record Open		25/05/2018	Ms June Test	
Patient Record Open		25/05/2018	Ms Natasha Johnston	
Patient Record Open		25/05/2018	Mr Headspace Org Admin (Headspace test org)	
Progress Note Reason For Contact Added		24/05/2018	Mr Michael Thompson	Occasion Of Service - GP Review
Progress Note Saved		24/05/2018	Mr Michael Thompson	Progress Note added with Presenting Concern - Diabetes mellitus

## Social

Provides a visual indication of the linked relationships in the Patient file.



## Closing a Case

Select the case you wish to close from the list and click on it.

### Case Management

Mr Headspace Org Admin (Headspace test org) ▼

**Current Cases**

Patient	Title	Case Manager	Created
Katniss Everdeen	HEADSS	Mr Headspace Org Admin (Headspace test org)	15/06/2016

**Closed Cases**

No Closed Cases

Check the Closed box and record the closure date and reason. Click the **Update** button.

**Case Details**

**Category**: HEADSS ▼  
**Case Opened**: 15/06/2016   
**Case Description**: Katniss suffers from PTSD due to the Hunger Games.  
(Old value: Katniss suffers from PTSD due to the Hunger Games.)  
**Allocated**:   
**Closed?**:   
**Date - Case Closed**: 28/05/2018   
**Reason closed**: Goals Achieved ▼

On the Cases page, the case will now appear in the Closed Cases list.

### Case Management

Mr Headspace Org Admin (Headspace test org) ▼

**Current Cases**

No Current Cases

**Closed Cases**

Patient	Title	Case Manager	Created	Closed
Katniss Everdeen	HEADSS	Mr Headspace Org Admin (Headspace test org)	15/06/2016	28/05/2018

If the case needs to be re-opened, click on the case, and on the Case Details tab, uncheck closed, and clear the closed date and reason fields.

## Mental Health Assessment

Add Cancel
 Completed

**Date**

**Staff Member:**  Not an MMEx User

**Location**

**Past Assessments** Refresh

Name	Date	Score	
KMSSI	09/06/2016	4	Select

<b>K10 Score</b>	<input type="text"/>	<b>Date Completed</b>	<input type="text"/>	<a href="#">Add new K10 Assessment</a>
<b>MSSI Score</b>	<input type="text"/>	<b>Date Completed</b>	<input type="text"/>	<a href="#">Add new KMSSI Assessment</a>
<b>SSEWB Outcome</b>	<input type="text"/>	<b>Date Completed</b>	<input type="text"/>	<a href="#">Add new SSEWB Assessment</a>
<b>Referred by/ Referring Agency</b>	<input type="text"/>			

**Presenting Issues**  Add

**Explanation:**

**Secondary Concerns**  Add

**Explanation:**

**Primary Issue: (Clinicians Opinion)**

**Presentation - Physical Explanation**

**Presentation - Emotional Explanation**

**Living Discourse**

**Mental Health Status**

**Diagnosis**  Yes  No  Not Sure

**Diagnostic Information**

<b>Mental Health Diagnosis 1</b>	<input type="text"/> <a href="#">More</a>	<input type="checkbox"/> Add to Medical History <input type="checkbox"/> Show in Problem List
<b>Mental Health Diagnosis 2</b>	<input type="text"/> <a href="#">More</a>	<input type="checkbox"/> Add to Medical History <input type="checkbox"/> Show in Problem List
<b>Mental Health Diagnosis 3</b>	<input type="text"/> <a href="#">More</a>	<input type="checkbox"/> Add to Medical History <input type="checkbox"/> Show in Problem List



<b>Mental Health Diagnosis 4</b>	<input type="text"/> <a href="#">More</a>	<input type="checkbox"/> Add to Medical History <input type="checkbox"/> Show in Problem List
<b>Current Medication</b>	<input type="text"/>	
<b>Current Care Plans</b>	<input type="text"/>	
<b>Additional Information</b>		
<input type="text"/>		
<b>Relevant Family Health History</b>		
<input type="text"/>		
<b>Client Support Network (Kin, Friends)</b>		
<input type="text"/>		
<b>Current External Agency Supports (Other Agencies)</b>		
<input type="text"/>		
<b>Actions</b>		
<input type="text"/>		
<b>Additional Referrals Made</b>	<input type="text" value="Select"/>	
<input type="button" value="Add"/>	<input type="button" value="Cancel"/>	

To save your Mental Health Assessment click on **Add**.

The Mental health Assessment can be located in the Documents. Click on the document Mental Health Assessment. The current form will open and be available for editing and updating.

When the form has been completed, check the Completed box in the top right hand corner and click **Update**.

The Mental Health Assessment will be locked, and view-able, but not editable.

Assessment tools completed as part of this Mental Health Assessment and separately to a full assessment - eg SSEWB, K10, will also be available in the Documents Tab.

## My Patient

You have the capacity to mark a patient as “My Patient”. This may be of assistance to you in running a report on the sub-set of patients that you manage.

To mark a Patient as “My Patient” (and hence making it easy to filter your Patient Reporting by “My Patients”): In the patient search list, right click on the Patient name.

Hover the mouse to **Add Tag** and then click **Add To My Patients** from the extended menu.

## Patient

Search  Search Clear Filter By: All ▾ And Any ▾ And Any

Title	Last Name	First Name	Gender	DOB	Medicare	URN
Mr	Bloggs	Jimmy		1965		678

- View Details
- Add Tag
- Billing
- Add Bill

Add To My Patients

- Any
- 30/50 diabetes group

## Case Management Administration screen

There is some configuration required at Organisation level to customise drop down lists and the appearance of the Case Management Module.

Please refer to [Org Admin - Case Management](#) for details.

## Registers

If you use our Case Management Module, you may benefit from using a Register -also know as a Duty or Intake Register. For more information see [here](#).