MMEx User Manual

Case Management

[View headspace workflows](#)

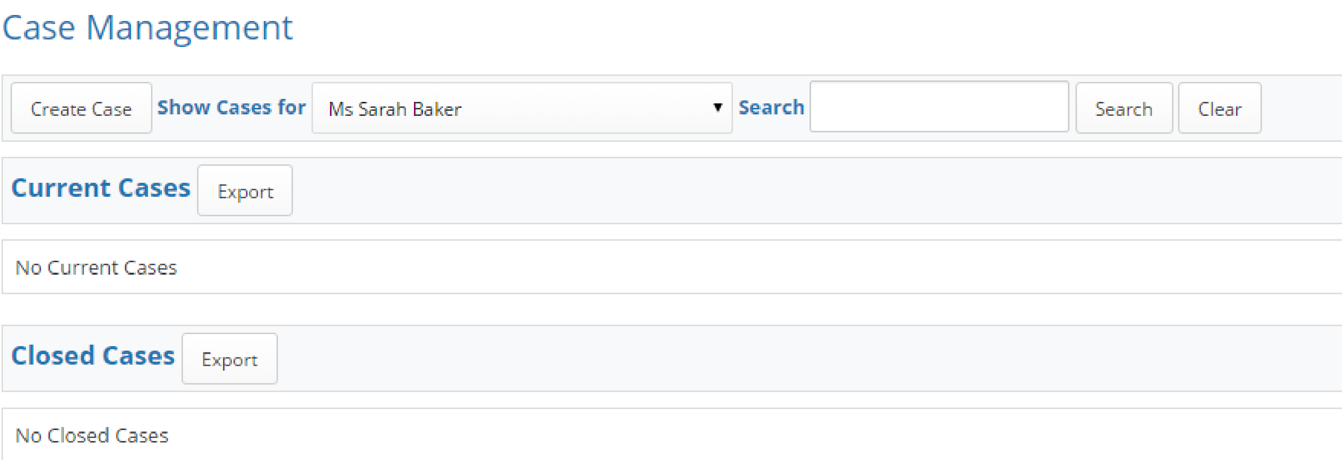
Case Management

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.

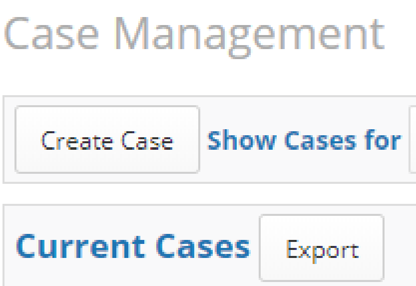
This can be used as a Case Management Worklist.



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

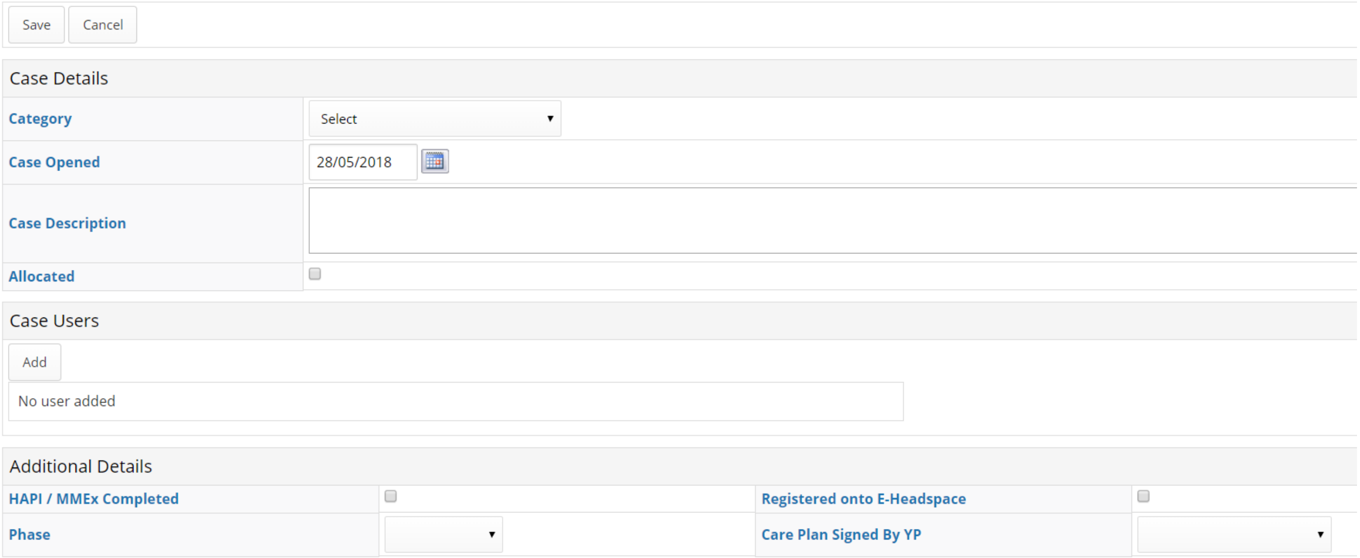
Accessing from the Patient Record will display that patient's cases only.
Patients can have more than one case with either open or closed status.

Creating a Case

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

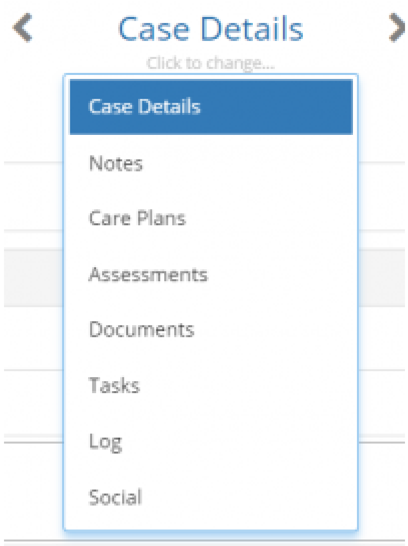
Select your patient via the patient search.

Categorise the case and complete the required fields.

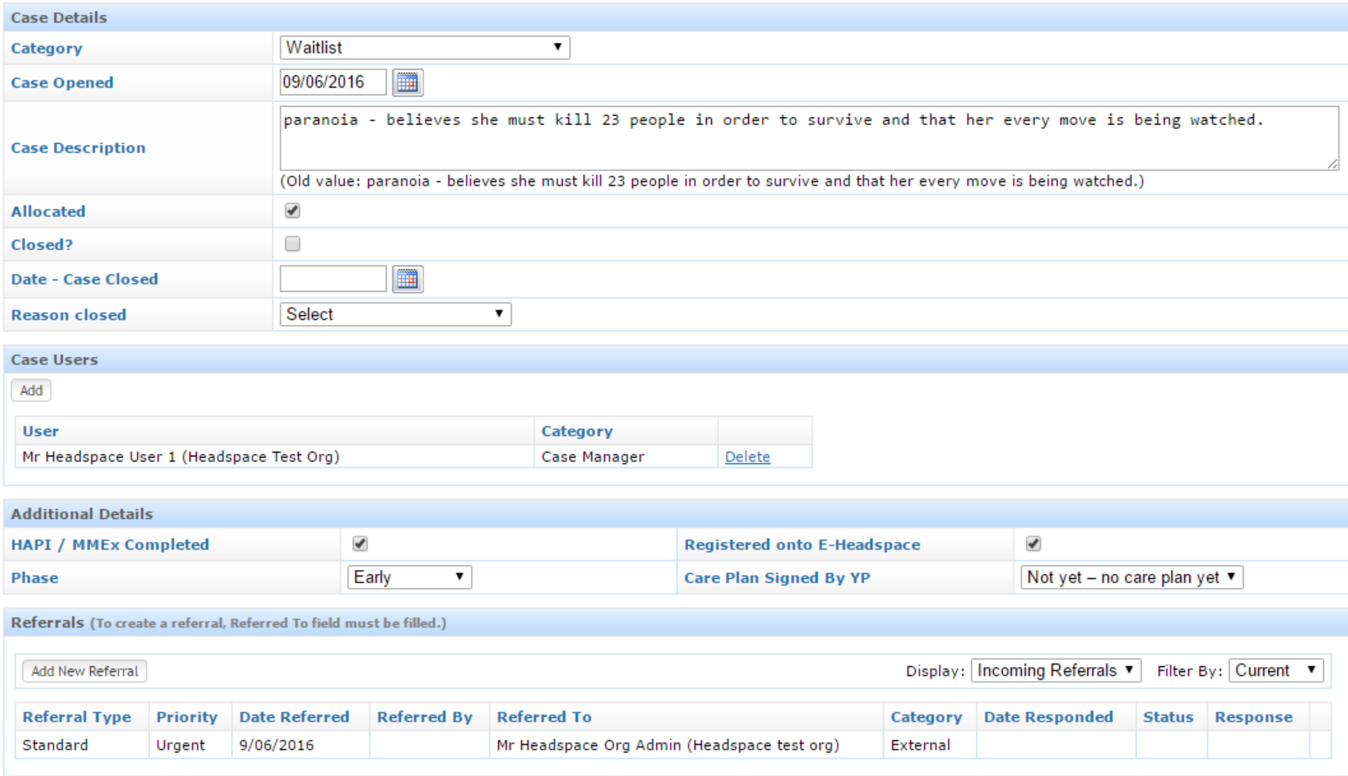


Allocated users (Case Managers) to the case. This will make the case visible in their worklist.

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



Case Details

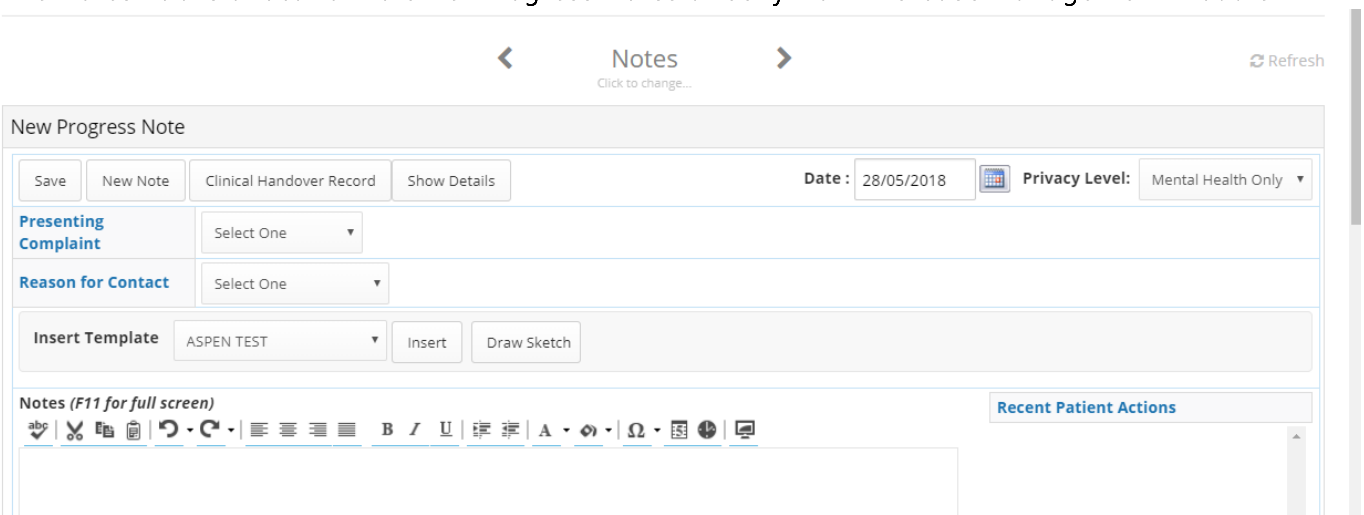


You can update the Case details and save any changes by clicking on Update.

Click on **Start an Assessment** to commence a new Mental Health Assessment.

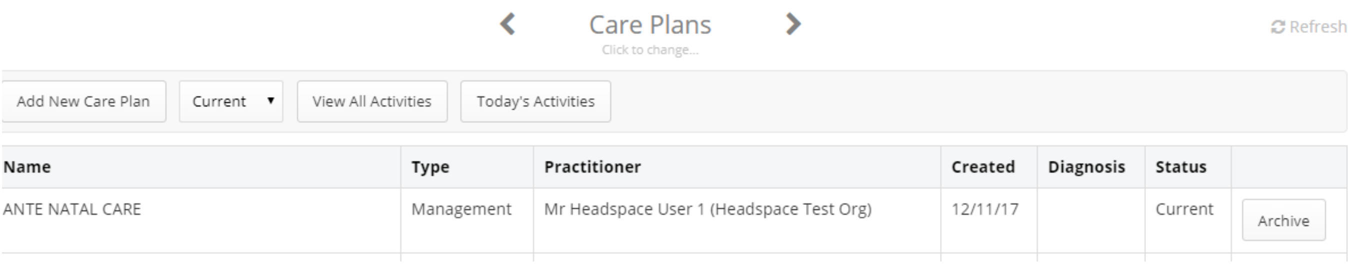
Notes

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



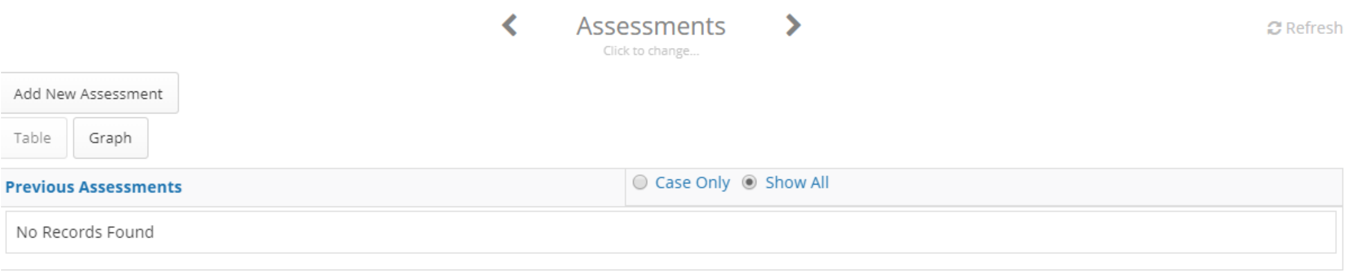
Care Plans

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



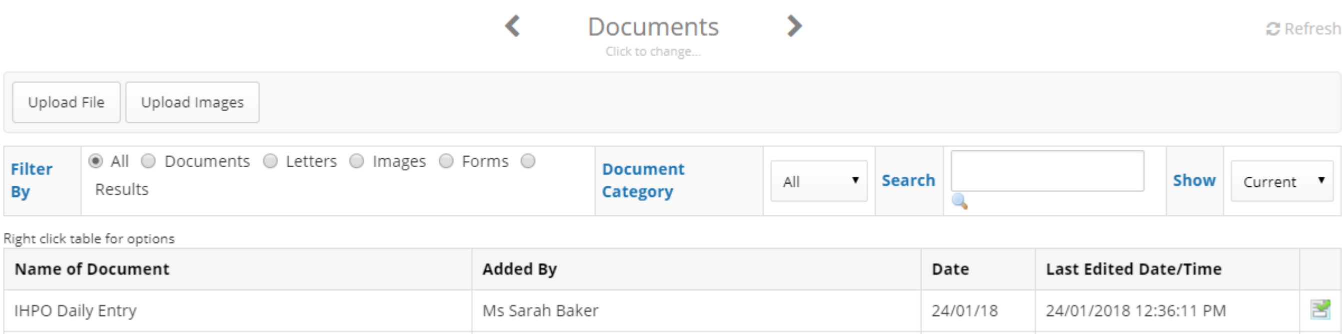
Assessments

Add new Assessments and displays previous Assessments completed.



Documents

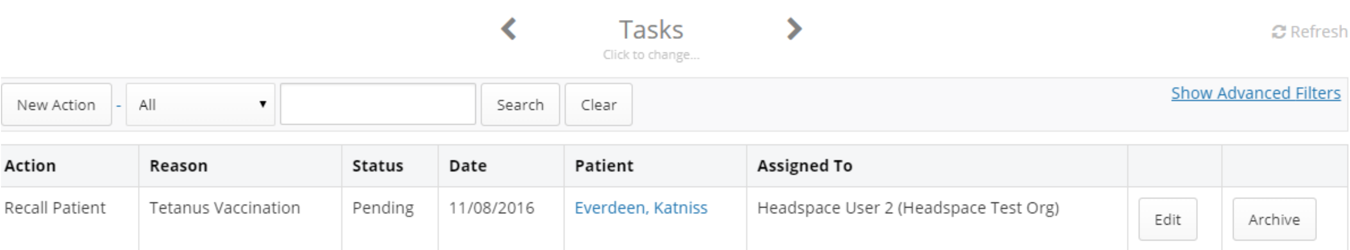
A duplicate of the Documents tab in the Clinical Record, you will find previously completed assessment forms saved here.



Upload new documents by clicking on the **Upload File** button. See here for further instructions.

Tasks

View all tasks related to this patient.



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.

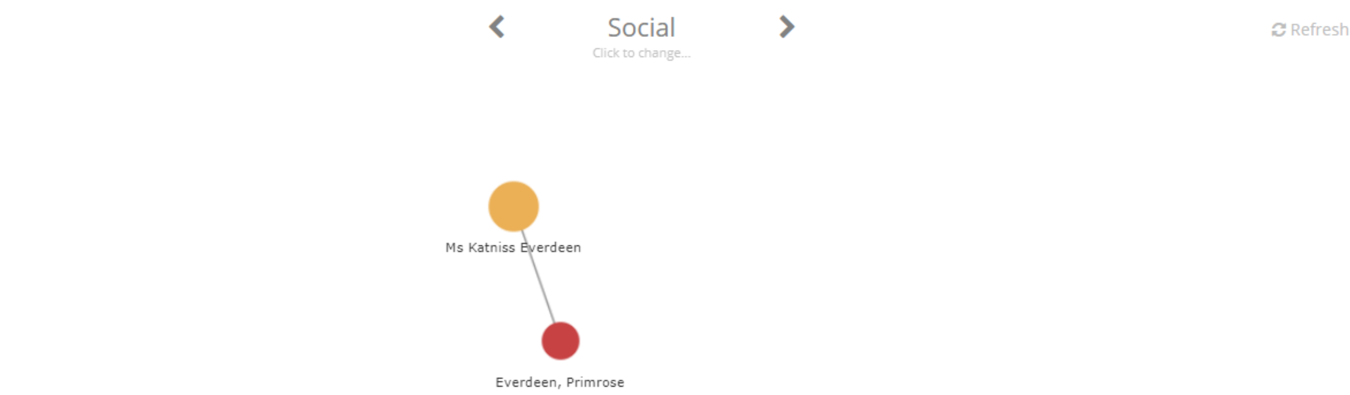
Log
Click to change...
Refresh

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

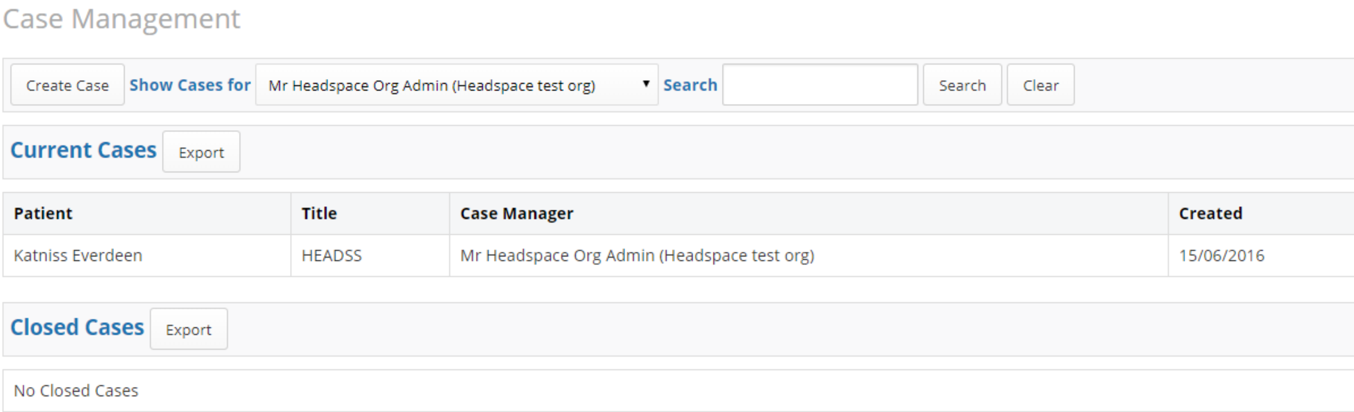
Social

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

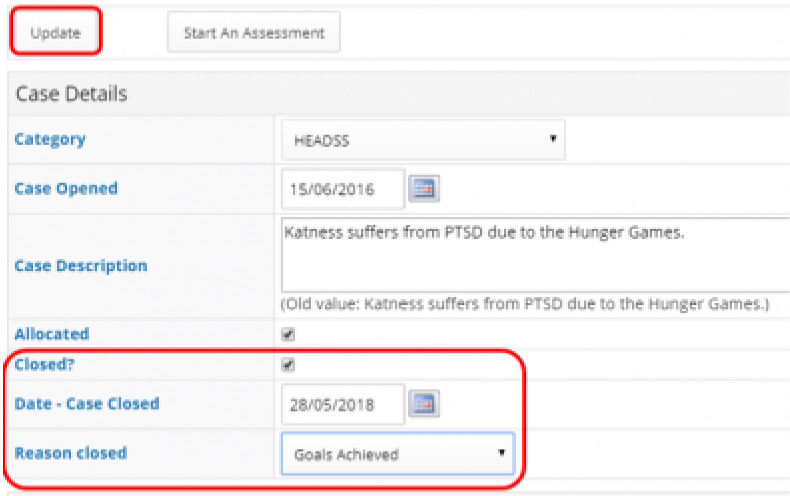


Closing a Case

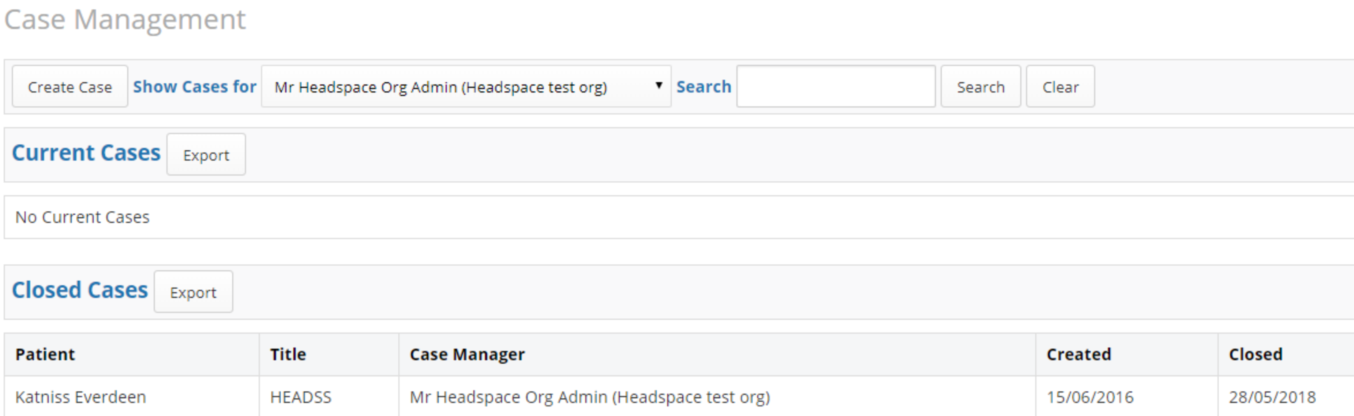
Select the case you wish to close from the list and click on it.



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

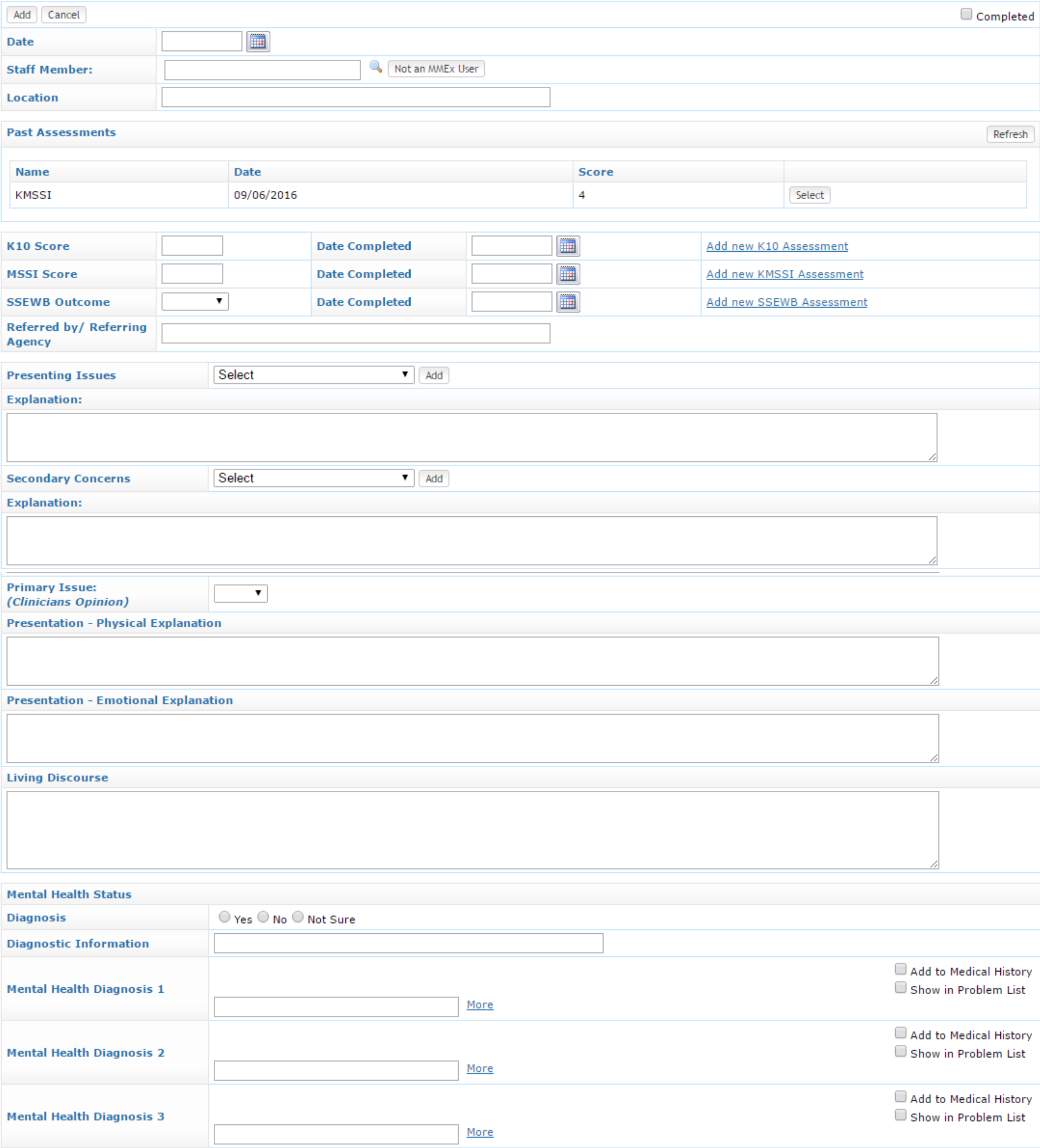


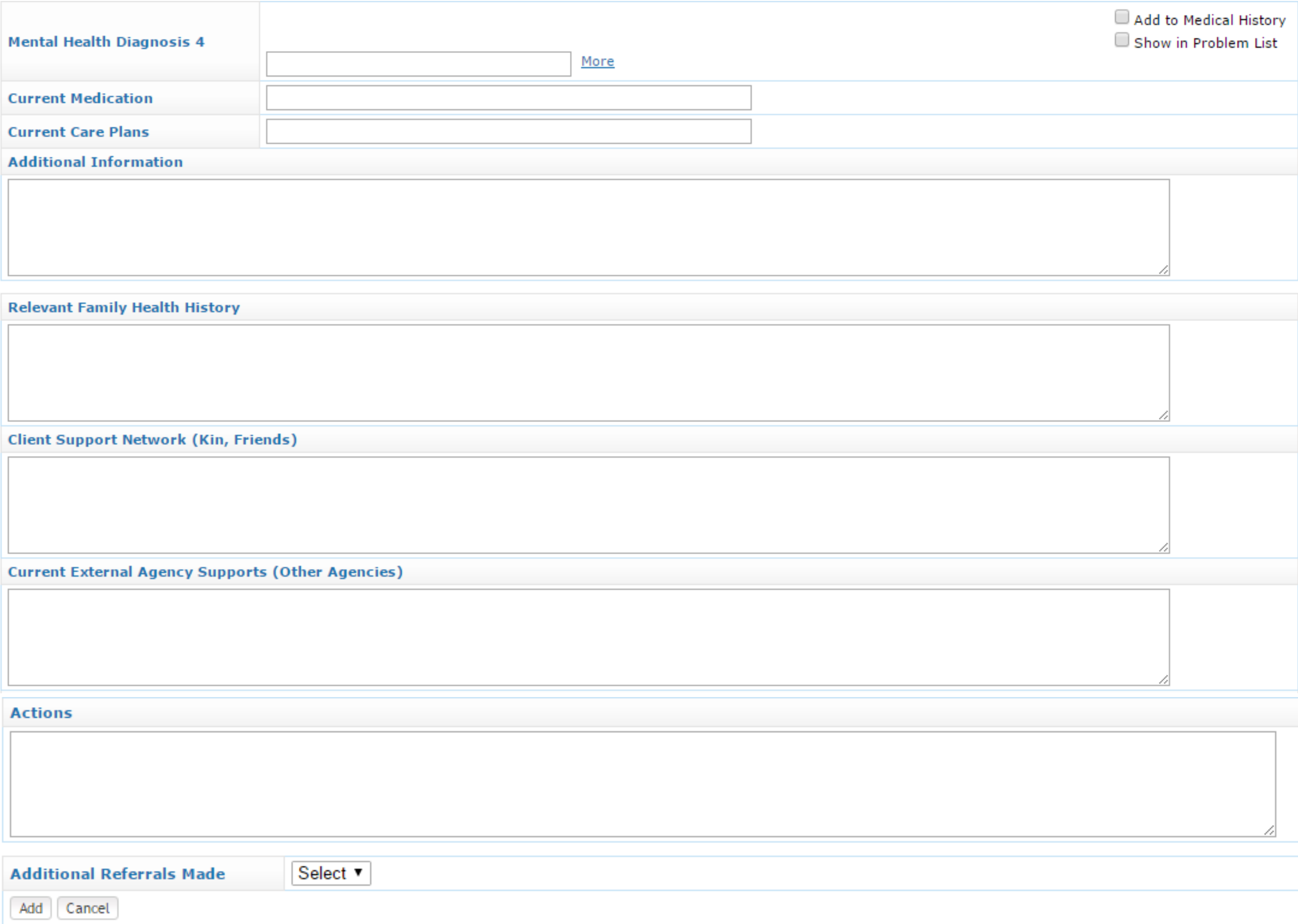
On the Cases page, the case will now appear in the Closed Cases list.



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
K10 Score
Date Completed
Add new K10 Assessment
MSSI Score
Date Completed
Add new KMSSI Assessment
SSEWB Outcome
Date Completed
Add new SSEWB Assessment
Referred by/ Referring Agency
Presenting Issues
Select
Add
Explanation:
Secondary Concerns
Select
Add
Explanation:
Primary Issue:
(Clinicians Opinion)
Presentation - Physical Explanation
Presentation - Emotional Explanation
Living Discourse
Mental Health Status
Diagnosis
Yes
No
Not Sure
Diagnostic Information
Mental Health Diagnosis 1
Add to Medical History
Show in Problem List
More
Mental Health Diagnosis 2
Add to Medical History
Show in Problem List
More
Mental Health Diagnosis 3
Add to Medical History
Show in Problem List
More



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.

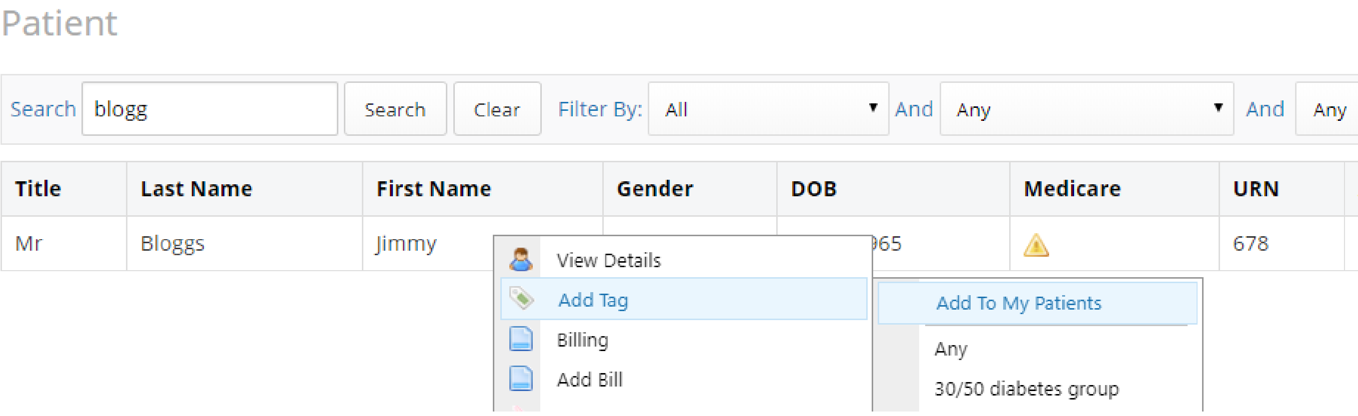
Assessment tools completed as part of this Mental Health Assessment and separately to a full assessment - eg SSEWB, K10, will also be available in the Documents Tab.

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.



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.