



## Case Documents

### Upload Documents

Collaborate allows Individual/families/support network, and support team member to add documents to an Individual's case. The following is the procedure to upload documents on a case as either Collaborative (shared with everyone on the case team) or Restricted (shared only with the Navigator).

#### Key Points:

- Only documents that are relevant to providing support and transition services to the Individual should be uploaded.
- Once documents are uploaded, they cannot be deleted or moved; be sure you are uploading the correct document to the correct Individual/case.
- If the Document has been uploaded to the wrong case, contact the Collaborate Helpline at 1-855-356-5609.
- You cannot upload password-protected documents.
- Planning documents that the Individual has previously completed and that can be shared should be uploaded as they provide additional details about what the Individual has previously done.

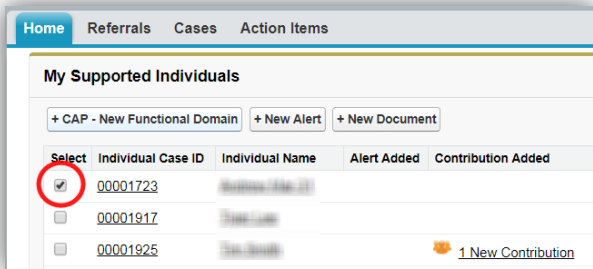
#### Context:

- You have an electronic document relevant to transition planning that you wish to upload.

#### Before You Start:

- Login to Collaborate and confirm you have access to the case you wish to add a *Case Document* to. If you cannot access the case, contact the Navigator to request access to the individual's case.
- You have decided that the document will be either *Collaborative* (shared with all case team members) or *Restricted* (Shared only with the Navigator).
- You have a secure, electronic version of the document.

#### Procedure:

| Step | Description  |
|------|--|
| 1    | <p>➔ Log into Collaborate</p> <p>➔ On your home screen, under <b>My Supported Individuals</b>, select the checkbox next to the case that you would like to add a Document to, as pictured below.</p>  |



- ➔ Click the **+New Document** button at the top of the list, as pictured below.

The screenshot shows a web interface with a navigation bar at the top containing 'Home', 'Referrals', 'Cases', and 'Action Items'. Below this is a section titled 'My Supported Individuals'. Within this section, there are three buttons: '+ CAP - New Functional Domain', '+ New Alert', and '+ New Document'. The '+ New Document' button is circled in red. Below the buttons is a table with columns: 'Select', 'Individual Case ID', 'Individual Name', 'Alert Added', and 'Contribution Added'. The first row of the table has a checked checkbox, the ID '00001723', and a name 'Audrey / Age 21'.

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- ➔ The “Select Case Document Record Type” screen appears
- ➔ Choose **Collaborative** if you want the document to be seen by all case team members on this case
- ➔ Choose **Restricted** if you want the document to only be seen by the Navigator and yourself
- ➔ Click **Continue**

The screenshot shows a screen titled 'New Case Document' with a subtitle 'Select Case Document Record Type'. Below the title is the instruction 'Select a record type for the new case document.' There is a section titled 'Select Case Document Record Type' containing a dropdown menu labeled 'Record Type of new record' with 'Collaborative' selected. Below this dropdown are two buttons: 'Continue' (circled in red) and 'Cancel'. At the bottom of the screen is a table titled 'Available Case Document Record Types'.

| Record Type Name | Description   |
|------------------|---|
| Collaborative    | Collaborative Case Documents will be shared with all support team members for this individual to assist others in picture and planning activities.  |
| Restricted       | Restricted Case Documents will only be shared with the Navigator and the user who added the document. Information should be uploaded as Restricted. |

- ➔ The Case Document Edit screen appears, as pictured below.

The screenshot shows a 'Case Document' edit form. At the top, there are 'Cancel' and 'Submit' buttons. Below is a section titled 'Case Document Information'. It contains a 'Case Document Name' text field, a 'Document Keywords' text area, a 'Category' dropdown menu (currently showing '--None--'), a 'Sub Category' dropdown menu (currently showing '--None--'), and a 'Description' text area. At the bottom of the form are 'Cancel' and 'Submit' buttons.

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- ➔ Enter relevant details about the document:



- **Case Document Name:** ensure the document name is unique and descriptive so that it is easily identified from a list
- **Category:** Select the most-appropriate category. The choices are different depending on whether you initially selected “Restricted” or “Collaborative”(see table below).
- **Sub-Category:** Choose the most appropriate choice
- **Description:** enter a short description of the contents of the document; for example, date, circumstances, outcomes or other pertinent details
- **Document Key Words:** Optional

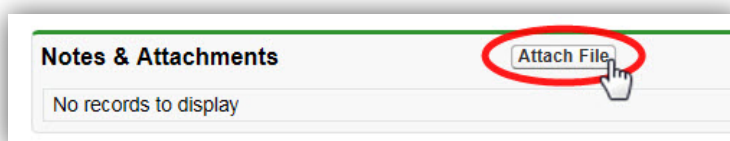
➔ Note that the Categories and Sub-Categories are dependent on whether you select the document to be Restricted or Collaborative. The table below summarizes the document categories.

| Category          | Sub-Category                | Restricted | Collaborative |
|-------------------|-----------------------------|------------|---------------|
| <b>Individual</b> | Consent                     | X          | X             |
|                   | Correspondence              | X          | X             |
|                   | Health / Safety Reports     | X          | X             |
|                   | Legal                       | X          | X             |
|                   | Protocol / Safeguard        | X          | X             |
| <b>Picture</b>    | IFSN - Template             |            | X             |
|                   | Education - IEP             |            | X             |
|                   | Other Media                 |            | X             |
| <b>Plan</b>       | Service / Support Plan      |            | X             |
|                   | Health Plan                 |            | X             |
|                   | Crisis / Contingency Plans  |            | X             |
| <b>Assessment</b> | Diagnosis Proof             | X          |               |
|                   | Behavioral                  | X          |               |
|                   | Adaptive Behavioral         | X          |               |
|                   | Psychological / Psychiatric | X          |               |
|                   | Therapy                     | X          |               |
|                   | Mental Health               | X          |               |
|                   | Other                       | X          |               |

- ➔ When entry is complete, click **Save**.
- ➔ The Case Document Detail screen appears


**4** ➔ If there is any information that has been entered incorrectly or you wish to add more data to the description, click **Edit** and make your changes.

**5** ➔ To upload the document, go to Notes & Attachments and click on **Attach File**, as pictured below.



- ➔ A popup window will appear where you will do the following:
  - Click **Browse** or **Choose File** and select the file you wish to upload.
  - Click **Attach File** to upload.
  - Click **Done**.



|     |   |
|-----|---|
|     | <div><div><div>Home Referrals Cases Action Items</div><div> <b>Attach File to Case Document Document</b></div><div><div><div>1. Select the File</div><div>Type the path of the file or click the Browse button to find the file.</div><div><div>1</div><div>Choose File</div><div>No file chosen</div></div><div><div>2. Click the "Attach File" button.</div><div>Repeat steps 1 and 2 to attach multiple files.</div><div>( When the upload is complete the file information will appear below. )</div><div><div>2</div><div>Attach File</div></div><div><div>3. Click the Done button to return to the previous page.</div><div>( This will cancel an in-progress upload. )</div><div><div>3</div><div>Done</div></div></div></div></div></div></div></div> |
|     | <b>Note:</b> when the upload is done, the browse/choose file box becomes blank.   |
| 6   | <ul style="list-style-type: none"><li>➔ The Case Document Detail screen appears. Click on the case number to return to the case.</li><li>➔ Repeat the process again if a different document needs to be uploaded.</li></ul>   |
| End |   |