



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.

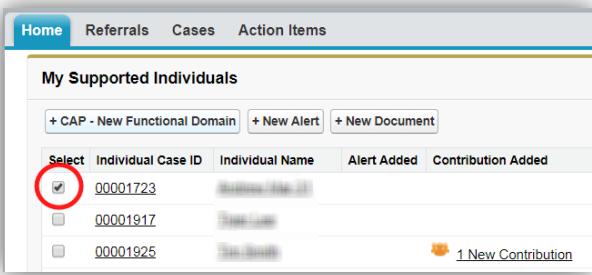
Context:

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

Before You Start:

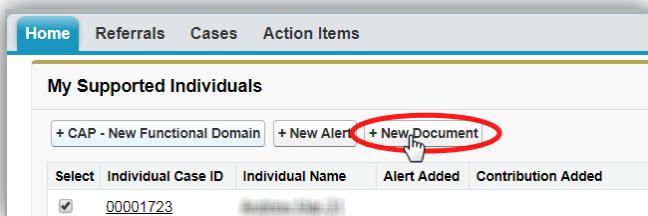
- Login to Collaborate and confirm you have access to the case you wish to add a *Case Document* to. If you cannot access the case, contact the Navigator to request access to the individual's case.
- You have decided that the document will be either *Collaborative* (shared with all case team members) 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 My Supported Individuals, select the checkbox next to the case that you would like to add a Document to, as pictured below.</p>  <p>The screenshot shows the 'My Supported Individuals' section of the Collaborate interface. At the top, there are buttons for Home, Referrals, Cases, and Action Items. Below that is a search bar with placeholder text '+ CAP - New Functional Domain', and buttons for '+ New Alert' and '+ New Document'. The main area displays a table with columns: Select, Individual Case ID, Individual Name, Alert Added, and Contribution Added. The first row has a checked checkbox in the 'Select' column, followed by the case ID '00001723' and a blurred name. The second and third rows have unchecked checkboxes and blurred case IDs. In the bottom right corner of the table area, there is a small orange icon with the text '1 New Contribution'.</p>

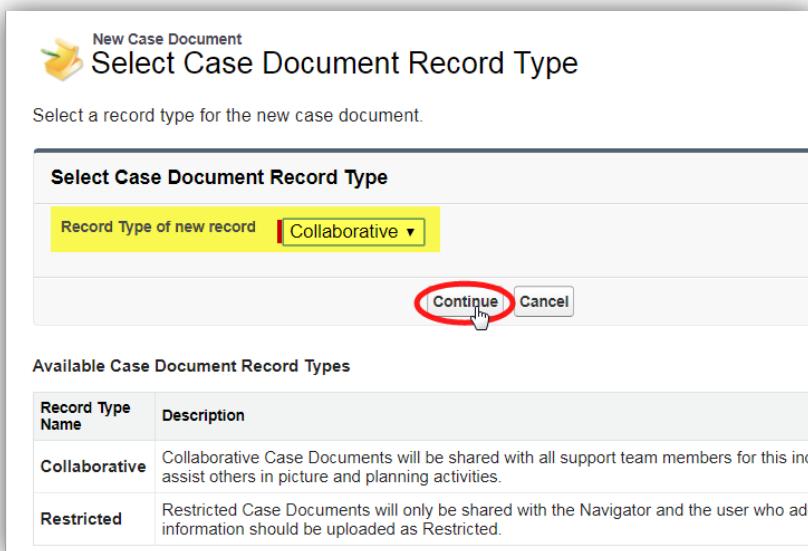


- Click the **+New Document** button at the top of the list, as pictured below.



The screenshot shows a navigation bar with tabs: Home, Referrals, Cases, Action Items. Below it is a section titled 'My Supported Individuals' with buttons: '+ CAP - New Functional Domain', '+ New Alert', and '+ New Document'. The '+ New Document' button is circled in red. A search bar below includes fields: Select, Individual Case ID, Individual Name, Alert Added, Contribution Added. A checkbox is checked, and the value '00001723' is shown.

- 2 ► 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**



New Case Document
Select Case Document Record Type
Select a record type for the new case document.

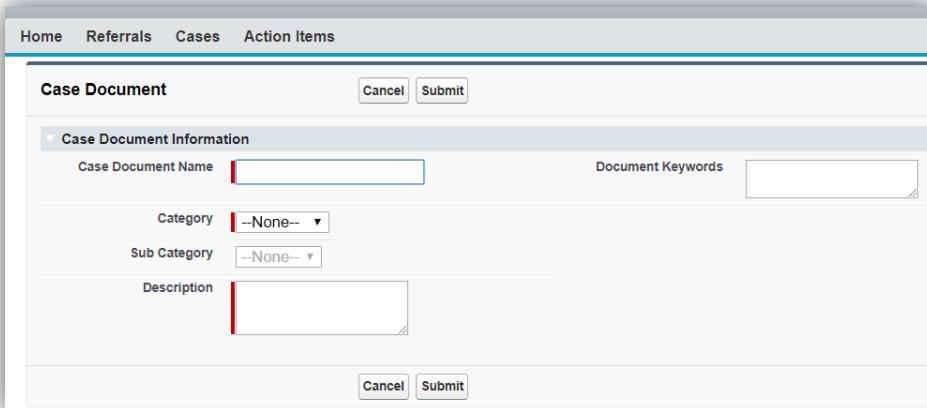
Select Case Document Record Type

Record Type of new record: Collaborative

Available Case Document Record Types

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

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



Home Referrals Cases Action Items

Case Document

Case Document Information

Case Document Name: [redacted] Document Keywords: [redacted]

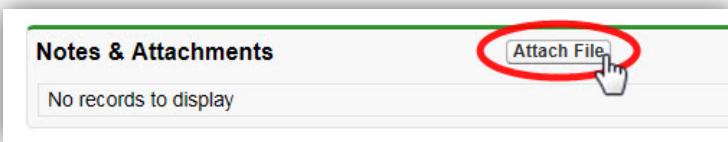
Category: --None-- Sub Category: --None--

Description: [redacted]

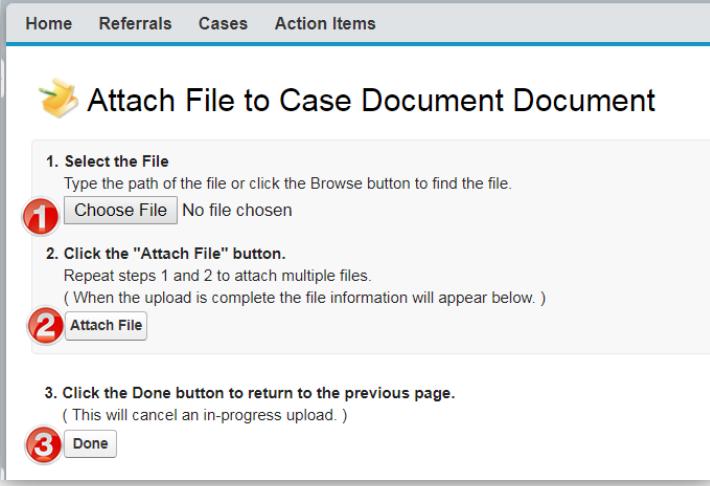
Cancel Submit

- 3 ► Enter relevant details about the document:



	<ul style="list-style-type: none">○ 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 <p>► Note that the Categories and Sub-Categories are dependent on whether you select the document to be Restricted or Collaborative. The table below summaries the document categories.</p>																																																														
	<table border="1"><thead><tr><th>Category</th><th>Sub-Category</th><th>Restricted</th><th>Collaborative</th></tr></thead><tbody><tr><td rowspan="5">Individual</td><td>Consent</td><td>X</td><td>X</td></tr><tr><td>Correspondence</td><td>X</td><td>X</td></tr><tr><td>Health / Safety Reports</td><td>X</td><td>X</td></tr><tr><td>Legal</td><td>X</td><td>X</td></tr><tr><td>Protocol / Safeguard</td><td>X</td><td>X</td></tr><tr><td rowspan="3">Picture</td><td>IFSN - Template</td><td></td><td>X</td></tr><tr><td>Education - IEP</td><td></td><td>X</td></tr><tr><td>Other Media</td><td></td><td>X</td></tr><tr><td rowspan="3">Plan</td><td>Service / Support Plan</td><td></td><td>X</td></tr><tr><td>Health Plan</td><td></td><td>X</td></tr><tr><td>Crisis / Contingency Plans</td><td></td><td>X</td></tr><tr><td rowspan="7">Assessment</td><td>Diagnosis Proof</td><td>X</td><td></td></tr><tr><td>Behavioral</td><td>X</td><td></td></tr><tr><td>Adaptive Behavioral</td><td>X</td><td></td></tr><tr><td>Psychological / Psychiatric</td><td>X</td><td></td></tr><tr><td>Therapy</td><td>X</td><td></td></tr><tr><td>Mental Health</td><td>X</td><td></td></tr><tr><td>Other</td><td>X</td><td></td></tr></tbody></table>	Category	Sub-Category	Restricted	Collaborative	Individual	Consent	X	X	Correspondence	X	X	Health / Safety Reports	X	X	Legal	X	X	Protocol / Safeguard	X	X	Picture	IFSN - Template		X	Education - IEP		X	Other Media		X	Plan	Service / Support Plan		X	Health Plan		X	Crisis / Contingency Plans		X	Assessment	Diagnosis Proof	X		Behavioral	X		Adaptive Behavioral	X		Psychological / Psychiatric	X		Therapy	X		Mental Health	X		Other	X	
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	<p>► When entry is complete, click Save.</p> <p>► The Case Document Detail screen appears</p>																																																														
4	<p>► 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.</p>																																																														
5	<p>► To upload the document, go to Notes & Attachments and click on Attach File, as pictured below.</p>  <p>► A popup window will appear where you will do the following:</p> <ul style="list-style-type: none">○ Click Browse or Choose File and select the file you wish to upload.○ Click Attach File to upload.○ Click Done.																																																														



	
	<p>Note: when the upload is done, the browse/choose file box becomes blank.</p>
6	<ul style="list-style-type: none">► The Case Document Detail screen appears. Click on the case number to return to the case.► Repeat the process again if a different document needs to be uploaded.
End	