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.

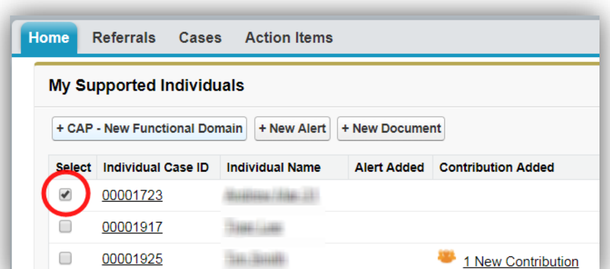
Context:

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

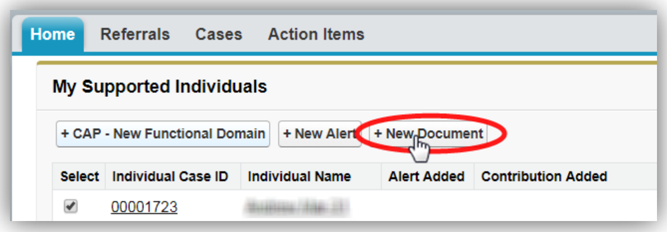
Before You Start:

- 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:

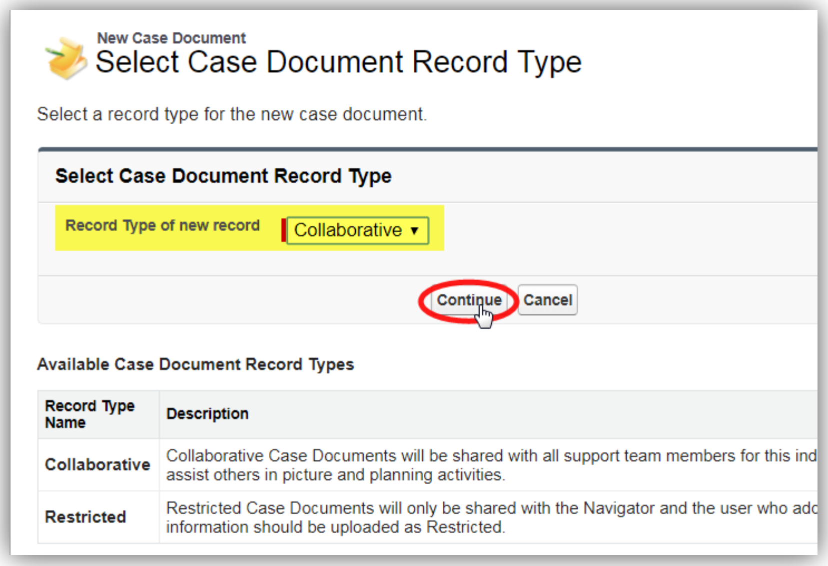
Step	Description
1	➔ Log into Collaborate ➔ On your home screen, under **My Supported Individuals**, select the checkbox next to the case that you would like to add a Document to, as pictured below. 

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

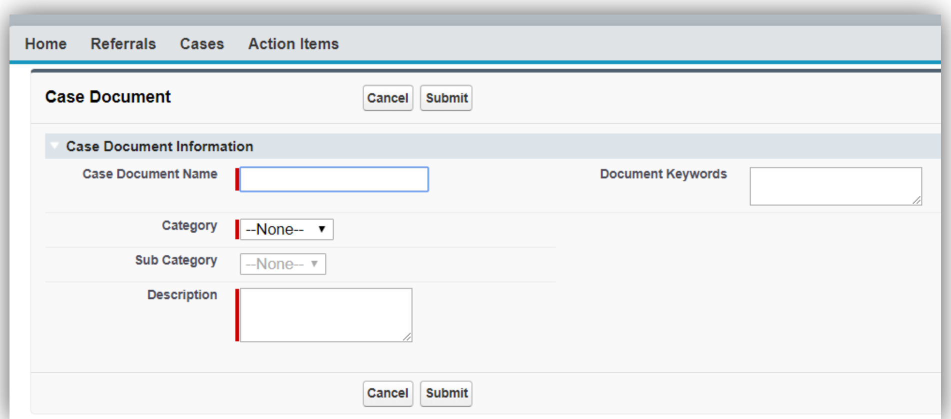


2

- 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**



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



3

- 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 summaries the document categories.

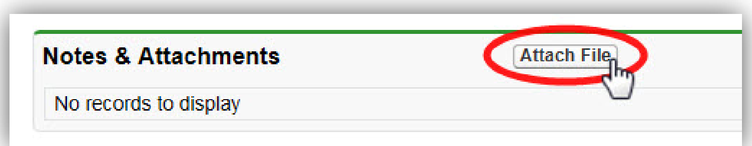
Category	Sub-Category	Restricted	Collaborative
Individual	Consent	X	X
	Correspondence	X	X
	Health / Safety Reports	X	X
	Legal	X	X
	Protocol / Safeguard	X	X
Picture	IFSN - Template		X
	Education - IEP		X
	Other Media		X
Plan	Service / Support Plan		X
	Health Plan		X
	Crisis / Contingency Plans		X
Assessment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

→ When entry is complete, click **Save**.

→ The Case Document Detail screen appears

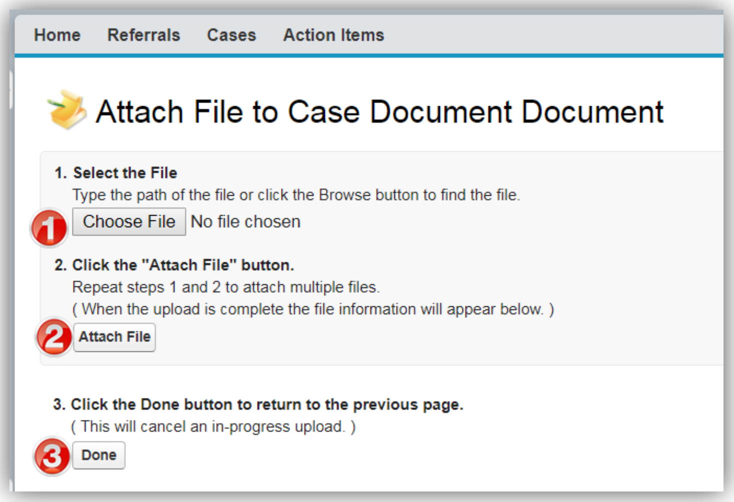
4 → If there is any information that has been entered incorrectly or you wish to add more data to the description, click **Edit** and make your changes.

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**.

	 **Note**: when the upload is done, the browse/choose file box becomes blank.
6	➔ 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	