

LAS

Case Closure

Version 1 – Sept 2020

Case closure definition

In LAS, the term closing a case refers to the act of physically closing down the whole file. In order to do this all plans must be ended and there must be no services in place. Case closure does not mean the same as closing the case to a worker i.e. deallocating that case from a worker whilst there are still services being provided or other intervention. See LAS guide on Professional involvements for further detail on active cases.

Case closure process

Case
Active Task: **Mr Chris Baxendale** (Reassign) Started: 29-Jan-2020

Case Decisions Task Details

Assessments
Start New Assessment

Care & Support Planning
If a pre-service financial assessment is required

Initial Contact Date
Date Case started
Date and Time of First following Case
First Contact Details
Person making contact

You can close a Case from the decisions tab on the Case Screen. You need to be the allocated case owner.

From the Case go to the decisions tab and start the Case Closure process as below

Dr Dave Test 35 years 18-Sep-1985 (Ref. 4000008)

Home Local Map

Case
Active Task: **Ms Una Kroll** (Reassign) Started: 16-Sep-2020 Due: 21-Oct-2020 Priority: No Priority Given
Task Comment: test

Case Decisions Task Details

Outcomes

- Case Closure **Start** (Assigned to Yourself)
- Transition-from-Carer N/A

Case → Transition from Carer
Case Closure
Authorise Closure

Dr Dave Test 35 years 18-Sep-1985 (Ref: 4000008) Care Pathway

Case Closure
 Active Task: Hs Una Kroll (Reassign) Started: 24-Sep-2020 Due: 20:05 Priority: No Priority Given

Case Closure Task Details

Close Case Reset Cancel

Initial Contact Details
 Date: 16-Sep-2020 21:59
 Reason Code: Assessment - Planned

Case Details
 Reason for Case: [Empty]
 Contact Method: Email
 Source Type: Self
 Date Case started: 16-Sep-2020 21:59
 End Date: 24-Sep-2020
 End Reason: Service User Died
 Reason for Closing Case: [Empty]

Request for Support
 Route of Access to Service: Community / Other Route
 Sequel to Request for Support: No Services provided - any reason
 Date the Sequel to Request for Support is determined: 24-Sep-2020

Back to: Case

Complete all mandatory fields and click on Close Case, which will lead to the Update Retention Record as below:

Finalise Save Cancel - Create new Retention Record

Information: The retention calculation has resulted in a retention record being generated. Please make any amendments to the record below and either click Save or Finalise to confirm your changes.

Retention Record

Retention Details
 Retention Status: Draft

Calculated Retention Details
 Calculated Code: Case Closure
 Calculation: Retention Date is calculated to be the Case closure date (24-Sep-2020) offset by 8 years
 Calculated Date: 24-Sep-2028

Actual Retention Details
 Retention Code: Case Closure
 Retention Date: 24-Sep-2028
 Action on Expiration: Begin Purge Process

Notes
 Retention Notes: test

Paper Files
 Paper File Location: [Empty]
 Location Text: [Empty]

Complete details as shown and click finalise

Depending on your profile, you may be asked to have the case closure authorised