# Case Management Reference Guide

# ion EDUCATION

# CASE MANAGEMENT

| OPEN | SCHEDULE | MEET | MANAGE | REVIEW |
|------|----------|------|--------|--------|

### CASES AUTO OPEN...

- Submit Referral

OR

- Create Plan

OR

- Schedule Meeting

OR

- Other

OR

- *All of the Above*

### SCHEDULE MEETING

- Invite staff outside regular attenders
- Add students to create agenda

### CONDUCT MEETING

- View student time line
- Enter meeting notes
- Schedule review meetings
- Upload documents
- Assign Tasks
- Take Attendance

### MANAGE CASE

- Take Notes
- Assign Tasks
- Assign Case Management Team
- Assign Tier, Priority, Progress Indicators and Focus Areas

### SCHEDULE REVIEW

- View Case Management dashboard
- View Individual Cases
- Set Review Meetings as needed

| Case Management Functions | | | |
|---|---|---|---|
| **Functions** | ***Best Practice*** | ***General Tips*** | ***Notes*** |
| **Case Management Dashboard** <br> ***Tools> Case Management*** | Staff can review open and closed cases <br> ● Cases can be sorted, searched, filtered <br><br> Staff can click on student hyperlinked name to access individual cases <br><br> Staff can schedule meetings | Columns are sortable and searchable <br> ● Click to sort <br> ● Type in search bar to search <br> ● Use Filter and date ranges to search <br><br> Columns can be drag/dropped to move (requires permissions) <br><br> Columns can be toggled on/off using the edit wheel(requires permissions) | Set permission settings for staff to manage the Case Management Dashboard <br><br> *Individual Cases allow staff to manage cases and adjust information that is shown on the dashboard* |
| **Forms** <br> ***Tools>Forms*** | Staff can submit referral form which may open a case <br><br> ***NOTE: Districts set up how cases will be opened****. Choices include the following: (1) Submit a Form (2) Create a Plan (3) Assign a Task (4) Schedule Meeting (4) Conduct a Plan Review - Your district will let you know how Case Management has been set up for you* | If using this feature, train staff to locate and complete forms <br><br> Click on Tools>Forms OR the "+" icon in the upper right next to the School dropdown <br><br> **Choose "+NEW" to access the form to fill out** <br><br> Click on the form hyperlink to access all forms that have been submitted. Click on the date hyperlink to view individual forms - *they will only populate if you have permissions to view them* | If desired, set permission settings to generate emails when cases have been opened <br> Forms <br> Create forms in Admin> Dictionaries> Forms (*Contact Customer Success for training*) <br><br> Once forms have been submitted, they are viewable in the Student Profile AND in the timeline of Case Management <br><br> Forms are stored here for the district <br><br> Permission settings for forms: <br> ● If a form has "protected responses", only those with permissions to see those responses will see them <br> ● If a form does NOT have "protected responses," then those who have permission to see the student will see the form |

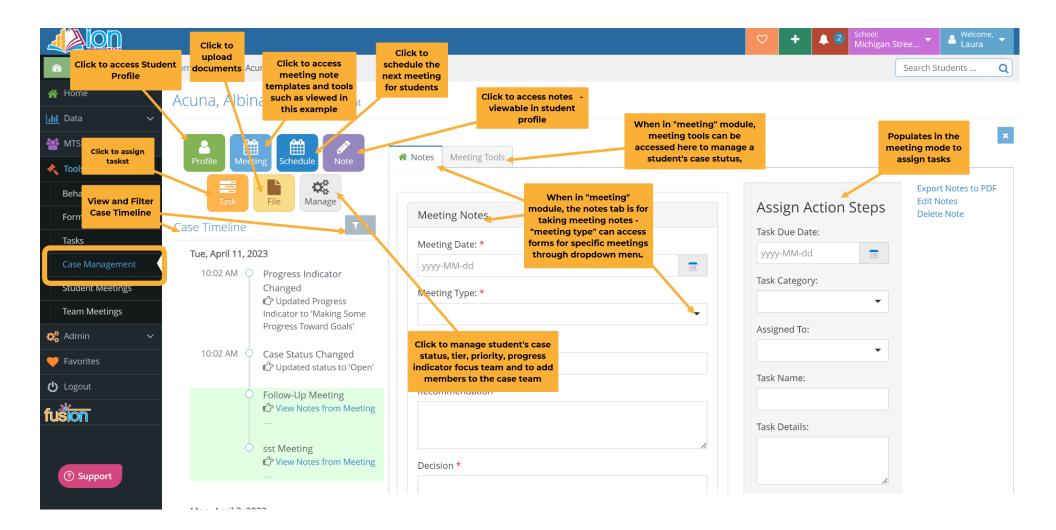| | | | |
|---|---|---|---|
| | | | responses<br>● If a form is "editable," then form *responses* can be editable |
| **Schedule & Access Meetings**<br>*Tools> Student Meetings*<br>*AND*<br>*Individual Cases* | Use **Student Meetings** to schedule initial meetings<br>–*This feature can be used for follow up meetings also*<br><br>Use **Meetings icon when accessing an individual case**<br>(1) to conduct a meeting AND<br>(2) to schedule follow up meetings for students | If using these features, train staff to<br>● Locate meeting calendar in ion<br>● Know how to set up and confirm meetings<br>● Communicate who has the responsibility to set up, edit, and confirm meetings<br>● Create workflow to know who manages the various functions during meetings<br>**Click on Tools>Student Meetings**<br>● Click "New Meeting" icon to create a meeting - follow prompts<br>● Click on an existing meeting and choose "Go to Agenda" to get to meeting agenda,<br>● To edit meeting agenda (i.e. - to add more students/staff), click on an existing meeting and choose "Manage Meeting"<br>**Access an Individual Case**<br>● Click on "Schedule Meetings" icon to schedule another meeting for that student | Student Meeting Function has a "preliminary" and "confirmed" setting.<br><br>When "confirmed," meeting invites will be sent to staff members that were invited when creating the meeting |
| **View Individual Cases**<br>*Tools>Case Management* | View all cases<br><br>Access individual case by clicking on hyperlinked names | Train staff to…<br>● Know how to locate and view all cases<br>● Know how to find and manage individual cases<br><br>Click on Tools>Case Management to view all open and archived cases<br><br>Click on hyperlinked name to find individual cases | All columns are sortable<br><br>Filter / Search as needed |
| **Access Meeting Note Templates**<br>*Individual Cases* | Take notes during meetings | Train staff to…<br>● Enter the meeting date FIRST<br>● Know that only one person can take notes at a time (*not like a* | Meeting notes are accessible by those who have permissions to see the case<br><br>Contact Customer Success to create and |

| | | *google doc)*<br>● Turn "enable auto save" to off to submit notes | upload meeting notes templates |
|---|---|---|---|
| **Take Attendance**<br>*Individual Cases*<br>*Meetings*<br>*Meeting Tools* | Take attendance at the meeting for both staff and non-staff attendees | If using this features, train staff how to use the attendance function<br><br>● After clicking the meeting icon, click on "Meeting Tools" tab<br>● Type in the first few letters of staff last name and click on the name to add to attendance<br>● To add non-staff members, type in the name in the "non-staff" box and click "+" to add | The Meeting Tools tab also accesses the following functions:<br>(1) Change case status<br>(2) Assign / Edit progress indicators<br>(3) Assign Tasks<br>(4) Attendance<br><br>*These functions are also found in the "Manage Cases" icon but can be accessed here quickly during meetings* |
| **Manage Cases**<br>*Individual Cases* | Manage cases:<br>(1) Change Case Status<br>(2) Assign / Edit Progress Indicators<br>(3) Assign tasks<br>(4) Assign / Edit Focus Areas<br>(5) Assign / Edit Case Managers | After accessing an individual case, click on the "Manage Case" button to access the functions | Add as many people to case as required<br><br>Only one person can be the case manager - this can be changed by choosing a new case manager. These choices are recorded on the timeline.<br><br>Some of these functions are available on the "Meeting Tool" tab when conducting a meeting |
| **Tasks**<br>*Tools>Tasks*<br>*AND*<br>*Individual Cases*<br>*AND*<br>*Student Profile* | Assign tasks to staff members and track the status of the tasks | **Assign a task to a staff member:**<br>(1) Individual Cases>Tasks icon<br>(2) Individual Cases>Meetings icon (under meeting AND meeting tools)<br>(3) Student Profile>Tasks tab<br>**View task details & add notes:**<br>(1) Go to Tools>Tasks Tab>List>Edit<br>   (a) Do not click save more than once<br>   (b) Cannot edit after task has been completed<br>(2) Individual Cases Timeline<br>**Mark task complete:**<br>(3) Go to Tools>Tasks Tab>List>Edit<br>(4) Individual Cases Timeline<br>(5) Tools>Tasks>Dashboard to drag/drop to complete | Staff will be emailed a calendar invite for the task.<br><br>Tasks that are assigned/completed will be viewable in the individual student timeline, student profile, and on the Tasks tab.<br><br>Customizing the case dashboard is an option and requires permission settings. Most staff will use the list and completed tabs. |

| | | (a) *Cannot add notes when using this feature - will only mark complete* <br> (b) *Cannot move someone else's task to complete on dashboard* <br> (c) *Cannot edit task completed task on dashboard* <br> (d) *May need to refresh after moving task* | |
|---|---|---|---|
| **Take Notes** | Take Student Notes - Stored in Student Profile | Take Notes as if it is a progress report - "This is how the student's learns best" | Staff who have permissions to see that student can see notes |
| **Upload Documents** <br> *Individual Cases* | Upload documents if needed | In order to upload a document, click on "File" icon in the individual case | Those who have permission can view documents. |

*Updated 08/2023; 02/2024; 04/2024*

**The first two images below are examples of individual cases:  The first shows a meeting note view; the second, case controls
The third image is the Case Management Dashboard**

Click to access Student Profile

Click to upload documents

Click to access meeting note templates and tools such as viewed in this example

Click to schedule the next meeting for students

Click to access notes - viewable in student profile

When in "meeting" module, meeting tools can be accessed here to manage a student's case stutus,

Populates in the meeting mode to assign tasks

Click to assign taskst

View and Filter Case Timeline

When in "meeting" module, the notes tab is for taking meeting notes - "meeting type" can access forms for specific meetings through dropdown menu

Click to manage student's case status, tier, priority, progress indicator focus team and to add members to the case team

**Acuna, Albina**

Profile | Meeting | Schedule | Note

Task | File | Manage

Case Timeline

Tue, April 11, 2023

10:02 AM — Progress Indicator Changed
Updated Progress Indicator to 'Making Some Progress Toward Goals'

10:02 AM — Case Status Changed
Updated status to 'Open'

Follow-Up Meeting
View Notes from Meeting ...

sst Meeting
View Notes from Meeting ...

Notes | Meeting Tools

**Meeting Notes**

Meeting Date: *
yyyy-MM-dd

Meeting Type: *

Recommendation

Decision *

**Assign Action Steps**

Export Notes to PDF
Edit Notes
Delete Note

Task Due Date:
yyyy-MM-dd

Task Category:

Assigned To:

Task Name:

Task Details:

Search Students ...

- Home
- Data
- MTSS
- Tools
  - Behavior Admin
  - Forms
  - Tasks
  - Case Management
    - Student Meetings
    - Team Meetings
- Admin
- Favorites
- Logout

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Support

School: Michigan Stree...

Welcome, Laura

**Adame, Josa Luis** » Case Management

**Individual Case View**

**Dropdowns will show choices created in the Case Management Dictionary**

Profile | Meeting | Schedule | Note

Task | File | Manage

**Case Timeline**

Choose an event from the timeline to view detail.

Tue, June 13, 2023

2:00 PM  Form Submitted
View PST Team Referral ...

1:59 PM  Case Opened

**Skill Profile**

PSI -
Total

Grade: 5

PSI -
Total
Target

Grade: 5

**Case Controls**

Case Status

Choose Status

Case Tier

Special Education

Priority

Choose Priority

Progress Indicator

Choose Progress Indica

Focus Area(s)

Academic - Reading
Academic - Math
Academic - Other Core
Academic - Electives

**Case Team** +

**(*Tools>Case Management - click on the student name*)**