

Case Management- Creating a New Session

Recording each session in case management is an excellent way of keeping track of what has been done to meet the goal of that case. This document shows you how to create a new session in an already opened case..

1.)The Sessions Tab

From the Display Case Management Page, Click the Sessions tab

Click the Add Session Button on the bottom.

Display Case Management

Details Sessions Documents Case Comments Custom Tables

Show 10 entries

Activity	Date	Caseworker
No data is available in the table		

+ Add Session View All Session Details

Created by: Admin, HIFIS Date Created: 2021-06-17 Updated by: Admin, HIFIS Date Updated: 2021-06-17



2.)Select the Activity

There are many to choose from. Select the one that is best suited for your session.



Client - Add Case Session

Goal: Mental Health

Activity: Select an option (Supportive Counselling selected)

Description: Referral, Reporting, Risk Assessment, Supportive Counselling, Translation Services, Transportation

Date and Time: Expended Time, Expended Hours, Expended Minutes

Caseworker: Select an option

Responsibility: Select an option

Agency Involved / Referral: Select an option

Client Present: No

4.)Fill in Session Details

You can also add how much time was spent in this session.

Click the Save button when finished.

Client - Edit Case Session

Goal: Mental Health

Activity: Counselling

Description: Spoke with Bruce regarding obtaining some help to cope with the loss of his parents. Agreed to set up another meeting in the future.

Date and Time: 2021-06-17 11:00 AM

Expended Time: Expended Hours: 0, Expended Minutes: 45

Caseworker: Admin, HIFIS

Responsibility: Select an option

Agency Involved / Referral: Select an option

Client Present: Yes

Family Present: No

Save Cancel

5.)Review Session Details

You're taken back to the Case Management Page. Review the details are correct.

If you need to change anything, Click the Pencil Icon to Edit.

Client - Edit Case Management

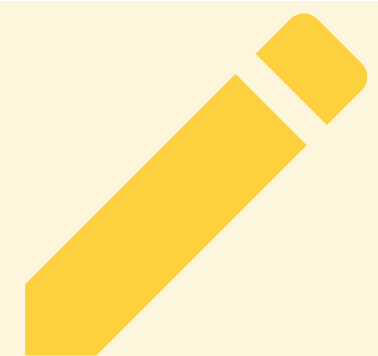
Details Sessions Documents Case Comments Custom Tables

Show 10 entries

Activity	Date	Caseworker	Action
Counselling	2021-06-17 11:00 AM	Admin, HIFIS	[Pencil icon]

+ Add Session View All Session Details

Created by: Admin, HIFIS Date Created: 2021-06-17 Updated by: Admin, HIFIS Date Updated: 2021-06-17



Keep up to date!

Remember to add any new sessions in your case as they happen.

Using HIFIS, we can keep track of all of our open cases easily!

Ready to Close the Case? Click the Details tab and Change the Case Status from Open to Closed.

Client - Edit Case Management

Details Sessions Documents Case Comments Custom Tables

Show 10 entries

Activity	Date	Caseworker	Action
Accompaniment to Appointments / Services	2021-07-01 11:45 AM	Admin, HIFIS	[Pencil icon]
Counselling	2021-06-17 11:00 AM	Admin, HIFIS	[Pencil icon]
Goal Setting	2021-07-08 10:00 AM	Admin, HIFIS	[Pencil icon]
Milestone Reached	2021-07-01 11:30 AM	Admin, HIFIS	[Pencil icon]

+ Add Session View All Session Details

Client - Edit Case Management

Details Sessions Documents Case Comments Custom Tables

Goal: Mental Health

Family Members: Select an option

Caseworker: Admin, HIFIS

Program: Status: Open

Contributing Factors: Start Date: 10:30 AM, Target Date: Closed - Goals not met

Total Expended Time: 02 Expended Hours 05 Expended Minutes

Total Elapsed Time: 0 Days

Save Cancel



Questions or Concerns? Email the team at hifis@sjhdc.ca