

Case Category

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This article is part of the systems administration guide. You will require administration access to view the pages mentioned in this article.

It is necessary to track the delivery of care over a time period as related to a specific patient goal. This may related to tracking services delivered for billing, tracking services for statutory reporting (non-admission) or claiming (e.g., DVA or NDIS).

How to Add a Case Category

For cases to be opened for patients, the system administrator must create individual case categories which will assist in searching and reporting. These will be dependent on each organisation but you can have as many as you need. To create a new case category:

1. From **Administration**, select **Cases** from the main menu
2. Select **New**.
 - a. The Case Category screen will appear.
3. In the **Name** field, type a name for your category.
4. In the **Category Type** field, select between **Generic** (no specific system behaviour required) or **DVA Community Nursing** (used specifically to track care delivered in accordance with the rules of DVA Community Nursing).
5. Click on **Enabled** to ensure Case users can view that category (categories can be disabled if no longer required).
6. In the **Case Worker Assignment** field, indicate whether a case worker is assigned **Directly to Case** or is assigned **By Category & Location**.
7. If you have a **Checklist** to associate, optionally select it.
8. In the **Associated Assessment Name** field, select an **assessment** to be associated with the case category (only active assessments will appear in the list).
9. In the **Expect Daily Events** field, select the checkbox is you anticipate that daily events will occur with this case category.
10. When done, click **Create Case Category**.

Case Category

Name*

Smoking

Category Type

Generic

☒ Enabled

Checklist

Case checklist example

Case Worker Assignment

Directly to Case

Associated Assessment
Name

Intake Form

☒ Expect Daily Events

Create Case Category

Cancel

Permissions

Restrictions can also be applied to users who do not need to record patient cases. Utilise the Users and Groups section to control who can view or edit cases (see Cases grouping and refer to [Groups](#) article for more information).