Case Management Add-On: All-In-One Set-up

Speech	*Cursor Actions*
Case Management can be used by many different kinds of organizations for many different purposes. Perhaps a tutoring organization needs to track service delivery for their students, or a hospice needs to track service delivery for their clients.	Show image listing examples of Case Management uses: food bank, hospice, counselling services, shelters, etc.
This video shows you how to customize your database so that Case Management meets your exact needs. Since this involves changing the structure of the records in your database, you need to log on to Sumac as an administrative user. For this example, we set up Case Management to track service delivery for a hospice. But remember that whatever types of cases you need to manage, these instructions show you how to set up and customize the Case Management add-on.	Show image that reminds them that this is just an example, but the instructions will show them what tools they should use/how to use them.
	Show Title: CONTACTS
Case Management often begins in the Contacts List. Clients are contacts in your database. When you add a client to your database, you often want to record standard intake information. This information is usually stored in contact records. You can customize contact records to track this information in your database.	Show image listing different things you'll need to set-up in the Contact List
If you add a Contact Type for clients, you can quickly find them in the Contacts List. You can also add extra fields to record intake information. Let's enhance our contact records with these additional fields.	Show contact record on Basic tab. Point to Contact Types Area
	Show title: CUSTOMIZING CONTACT TYPES
In the Sumac console, click Utilities, Customize Database, and Lookup Lists.	Show console. Expand Utilities, Customize Database, choose Lookup Lists.
Lookup Lists let you manage all the customizable drop-down menus, check boxes, and extra fields in your database.	
Select the area of the database you want to customize. We are making changes to the contact record, so we click the Area: Contacts,	Choose Area: Contacts
Sumac shows you all the Lookup Lists hat apply to Contacts.	Point to list of Lookup Lists
Choose the specific Lookup List that you want to edit. Click to add a Contact Type.	Choose Lookup List: Contact Types.
The whole list of contact types shows here.	Point to Contact Types
Click New, and type the name of the new contact type into the description field.	Click New. Type “Client”

If a contact is identified as a 'Client' in your database, you can make it so that other fields become mandatory. You can fill in the names of any other fields that you want to become mandatory by selecting them from this drop down list.	Click in 'Mandatory Fields' field. Expand/Collapse 'Add Field' drop down.
Click OK to save the new Contact Type in your database.	Click OK.
	Show title: ADD INTAKE TAB TO CONTACT RECORDS
Many organizations add a custom Intake tab to include extra fields for their clients' intake information as part of their Case Management needs. This can be set up through Lookup Lists.	Show a sample contact record with an extra tab - highlight the extra tab.
In the Sumac console, click Utilities, Customize Database, and Lookup Lists.	Show console. Expand Utilities, Customize Database, then choose Lookup Lists
Choose the Area: Contacts, then choose the Lookup List: Extra Fields.	Choose Area: Contacts, choose Lookup List: Extra Fields.
Click New to add the first field.	Click New.
Choose the Field in Contact Record. As you create more fields, Sumac will prompt you to choose the next available field number.	Choose: Extra 1
Name In Dialogs lets you name this field. For this example, we'll start by adding a field to hold the name of the doctor who refers a client, so we'll name this field “Referred By”	Enter Name in Dialogs: “Referred By”
Name In Templates lets you specify the mail merge code that identifies this field. Usually, this is entered using the same name used in the “Name in Dialogs” field, using an underscore instead of a space.	Enter Name in Templates: “referred_by”
Extra fields in the Contact record can be spread across many extra tabs. To tell Sumac which tab to place this field on, enter the name of the extra tab in the Dialog Tab Name field. For this example, we'd like all of this intake information to appear on an “Intake” tab, so we'll enter the Dialog Tab name as “Intake”	Enter Dialog Tab Name: Intake.
Entry Order is the order that you want the extra fields to appear on the Intake tab. Rather than numbering them “1,2,3,...” and so forth, we recommend spacing fields out in increments of 5 or 10 so that you can easily add fields in between other fields if any subsequent customization is required. Since this is the first field in our Intake tab, we can give it an entry order of 10.	Enter Entry Order: “10”
Data Type lets you choose what type of data will be in this field.	Open Data Type drop-down menu.
For example, you might want to record some types of data in a drop-down menu, and other types of data in a check box, or a checkbox group.	Point to drop-down menu, checkbox and checkbox group

For this example, we'll choose a text field so that we can type the name of the referring physician or institution into a text field.	Choose Data Type: Text
Since information about clients is often confidential, you can add security to this field by specifying that it is only visible to users who can see sensitive data.	Put check mark next to “Visible only to users who can see sensitive data”
Header Text allows you to specify a header name that you want to appear above this specific field. Using Headers can be a helpful way to visually organize fields on the extra tab. If you'd like to use Headers, you can enter the header name here.	Point to Header Text.
Click OK to save the new field.	Click OK
A hospice might also want to add a field to specify what type of illness their clients have, so we'll click New to add another extra field.	Click New
	Choose Field in Contact Record
We'll name this field “Illness”	Enter Name in Dialog “Illness” Enter Name in Template “illness”
Type “Intake” into the Dialog Tab Name field to ensure that this field also appears on the Intake tab.	Enter Dialog Tab Name: “Intake”
Enter 20 into Entry Order to position this field after the Referred By field.	Enter Entry Order: “20”
To identify the illness, let's create a checkbox group that allows users choose from a selection of illnesses.	Choose Data Type: Checkbox Group
We can specify the selection of illnesses in the Value List field.	
When entering the selection of illnesses, separate them with semi colons.	Enter: “Cancer; Heart Disease; Kidney Disease; AIDS; Parkinsons; Alzheimers”
To ensure that this field is only visible to users who can see sensitive data, put a check mark here.	Put check mark next to “visible only to users who can ...”
Click OK to save this field.	Click OK
Continue these steps until you've added all the fields you require on your intake tab.	
Once you've added all the necessary extra fields to your intake tab, restart Sumac in order for those changes to take effect.	Close Sumac. Run Sumac and log-in again.
After restarting, if you open a contact record, you can see the Intake tab we created to record the intake details for clients.	Open Contact list. Open contact record. Go to Intake tab.
	Show title: CASE MANAGEMENT LIST

The Case Management add-on also includes a Case Management list that allows you to track more dynamic information about your cases. For example, a hospice might add a new case record each time a Case Worker meets with a client, or a children's organization might want to add a new record each time a child or family uses one of their programs. Sumac allows you to customize the Case Management list to meet your organization's unique Case Management needs.	Show image with list of examples of case records: a hospice could track each time a case worker meet with a client a children's organization coud track whenever a child or family uses their programs a food bank could track whenever someone uses their services
The rest of this video shows you hot to define or change the fields that are in your Case Management records.	
Since every organization has different Case Management needs, you may want to re-name the Case Management list. To do this, click Utilities, Customize Database, then Preferences.	Show console. Expand Customize Database, choose Preferences.
In the Preference window, select the Case Management tab, and entering the new name of your Case Management list.	Go to Grow-Your-Own tab
For this example, let's call the Case Management list Case Records. Enter "Case Record" in the singular name field, and "Case Records" in the plural name field.	Enter "Case Record" in the singular name field, and "Case Records" in the plural name field.
Click OK to save this change.	Click OK.
You need to restart Sumac for this change to take effect.	Close Sumac. Run Sumac/log in
Now when we expand the Specialized menu in the console, you'll see that Case Management has been re-named to Case Records. To open this list, click Case Records.	Expand Specialized. Point to Case Records. Click Case Records.
Click New to see a new Case Record.	Click New.
Currently, these Case Records have been predefined to hold some generic case management fields. There are separate tabs for General, Key Contacts and Service Delivery, which helps you organize different types of data within each Case Record. Note, however, that you can change anything in the pre=built records: the tabs, the fields, the labels, everything!	Point to fields mentioned. Click through tabs mentioned.
You can start using the Case Records list right away. But you can also make some changes to the records.	Close Case Management
In your Sumac console, click Utilities, Customize Database, and Set Up Case Management.	Expand Utilities, Customize Database, and choose Set up Case Management
That opens a new window where you can see all the pre-defined fields in the Case Management records. This is where you can add new fields to case records, or make changes to existing fields.	Point to new window
For example, one of the pre-set tabs in Case Records holds Key Contacts, like Parent, Doctor, Social Worker and Next of Kin. Perhaps you want to add a new contact field to hold the name of a second parent, and you want to re-name "next of kin" to "Emergency Contact."	Screen shot: Show pic of current Case Record on Key Contacts tab. Highlight each field mentioned.

First, add a new field for the Second Parent's name.	
Since we already have first Parent field defined, we can replicate it for the Second Parent field we want to add now.	Point to First Parent field
Click once to select the first Parent field, then click Duplicate.	Click New
The Internal Field name allows you to choose what type of field you want to add. For this example, we'll choose to add a ContactID field so that the Case Records can be linked to the second parent's contact record.	Choose Internal Field Name “ContactID”
The Visible Name field lets you define the name for this field. Let's name this field “Second Parent”	Visible Name: Second Parent
Entry Order determines the order that you want this field to appear in the Case Record. We recommend spacing Entry Orders out in increments of 5 or 10 to ensure there is space left between fields, just in case you need to make changes or re-arrange fields down the road.	
Specify an Entry order of “15” to ensure that this field comes after the First Parent field, which had an entry order of 10.	Entry Order: 15
Click OK to save this field.	Click OK.
We also want to re-name the Next of Kin field. To do this, double-click the Next of Kin field.	Double-click “Next of Kin”
In the Visible Name field,	Erase “Next of Kin”
type “Emergency Contact”	Enter: Emergency Contact
Click OK to save this change.	Click OK
Another area of Case Management you may want to customize is the Service Delivery tab. Because the Sumac team doesn't always know what types of services an organization might offer their clients, there are some standard, generic options listed in on the Service Delivery tab, like Service 1, Service 2 and Service 3.	Screen shot: Show pic of current Case Record on Service Delivery tab. Highlight each field mentioned.
Let's change these generic names to something more apporpirate for our example: a hospice.	
To add these options, double-click the Services Used 1 field.	Show Case Management field definitions. Double-click Service Used 1
Rename this field to Family Services.	Enter *Family Services* into Visible Name field
There is a field where you can list either a formula, or the check box choices that you want to appear. You can erase the existing check box choices, then start typing in your own, separating each choice with a semi-colon.	Point at formula field Erase existing options. Enter: Personal Counselling;Family Conselling;Grief Counselling.

Click OK to save this change.	Click OK.
Continue making this change to the other Services Used fields.	Double-click Service Used 2. Enter *Alternative Therapies* into Visible Name field Erase existing options. Enter: Aromatherapy;Therapeutic touch;Music therapy;Art therapy Click OK
If you need only two fields for services, then the third can be deleted.	Click to select Service Used 3. Shift click to Service 3 Notes, selecting three entries. Click Delete Click OK
Continue these steps until you've added or made changes to all the fields you require on your case records.	
Since these changes alter the structure of the records in the Sumac database, you must restart Sumac in order for those changes to take effect.	Close Sumac. Run Sumac and log in.
Now when you restart Sumac, you'll be up and running with a Case Management add-on that's totally unique to your needs!	In Sumac Console, expand Specialized, open Case Records, click New. Point to Case Record. Go to Key Contacts tab, point to changes. Go to Service Delivery tab, point to changes.
For more details on customizing Grow-Your-Own records, adding contact types, or customizing extra tabs in Contact records, move on to Sumac's other Customization How-to videos.	Show image listing titles of other, more in-depth customization training videos: “Create a Grow Your Own Module”, “Lookup Lists”, “Add Tabs to Contact Record”