

P-2376 Electronic Case Files (continued)

P-2376A Electronic Case Files – Creating Files (B21-08)

Each district will set up a file in their district's shared drive. The files will be labeled "District Reach Up Case Files". For example, "ZDO Reach Up Case Files" (this would be where your case notes are currently saved).

Y:\ESD\District

Y:\ESD\District\District Reach Up Case Files

Within each District file everyone that is receiving Reach Up will have their own individual folder. The folder will be saved by their last name, first name, and last 4 of their SSN. For example, "Doe, Jane 1234".

Within each person's file there will be subfolders to save documents labeled by brad to match the paper file.

Brad 1

Brad 2

Brad 3

Brad 4

Brad 5

Brad 6

Case managers can add a description to each brad, but they are not required to. They may also create yearly sub-folders within each brad if there is a larger number of documents saved. Additional sub-folders should not be created unless there are many documents pertaining to the same thing. For example, housing.

If someone's name changes, the case manager is responsible for changing the name of the file. If someone reopens with a new name, the District Supervisor is responsible for changing the name.

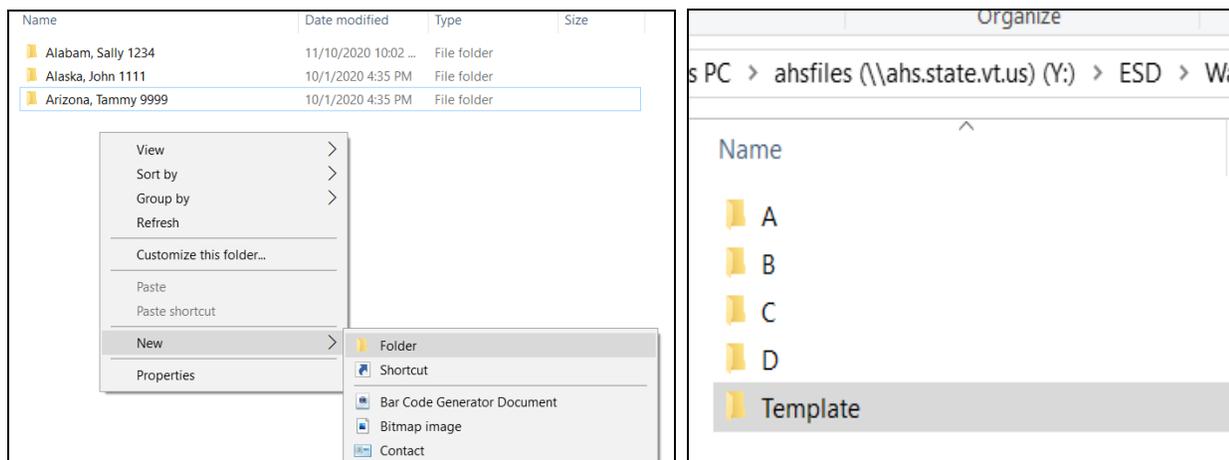
District offices (DO) may each decide how they would prefer to organize participant case files. They may choose to save them alphabetically by participant last name, or they may choose to save them by case manager. If DO chooses to save participant case files by case manager, they should create a "Closed" folder. A "Closed" folder is recommended if files are saved alphabetically as well, but not required.

Case Manager/Supervisor Support

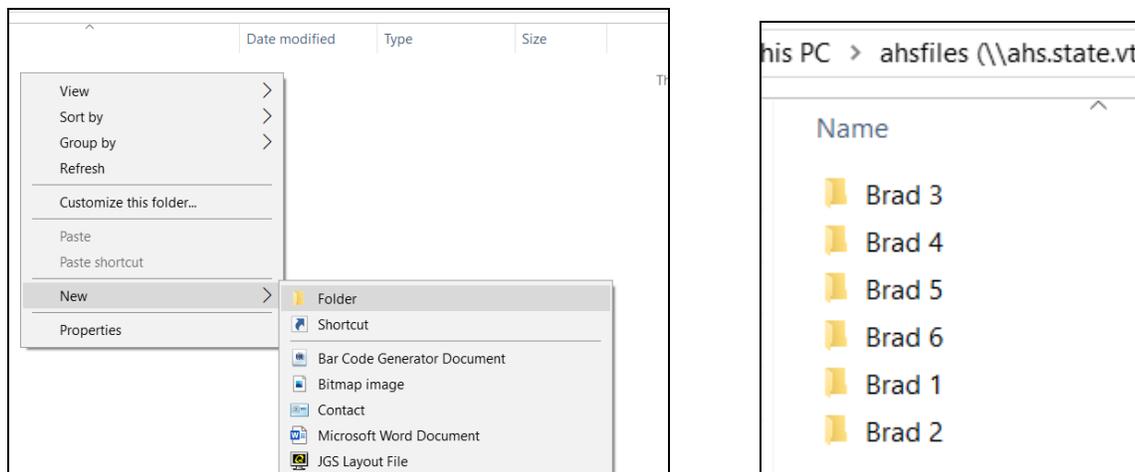
Setting Up Folders

Create a template that includes all 6 brads and save to the share drive. Create the participant's folder, then open the template, highlight, and copy all 6 brads, and paste into your folder. (Or copy the entire template folder, paste it where you want the new folder and rename it.)

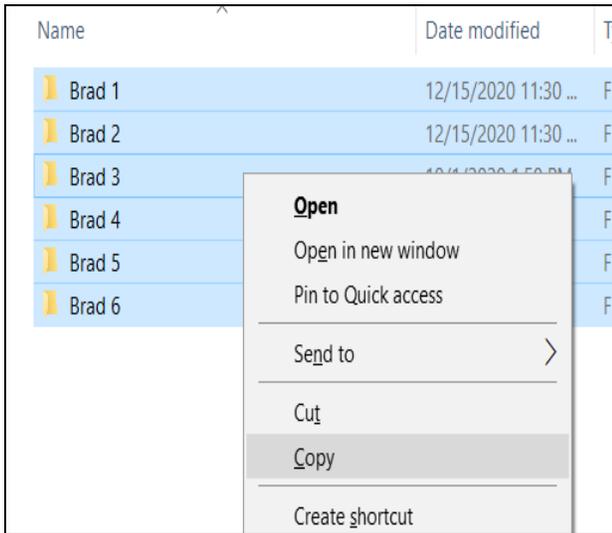
To create a template folder right click select "New", then "Folder". Name the folder "Template".



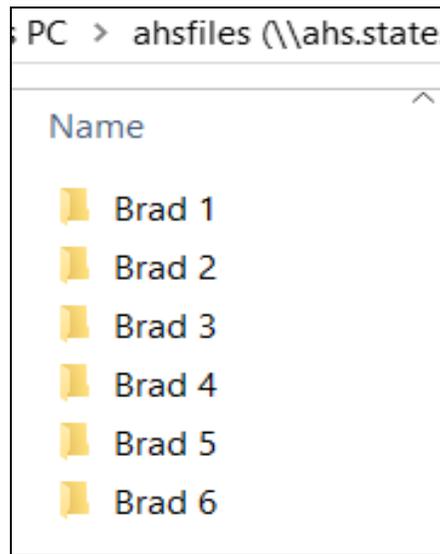
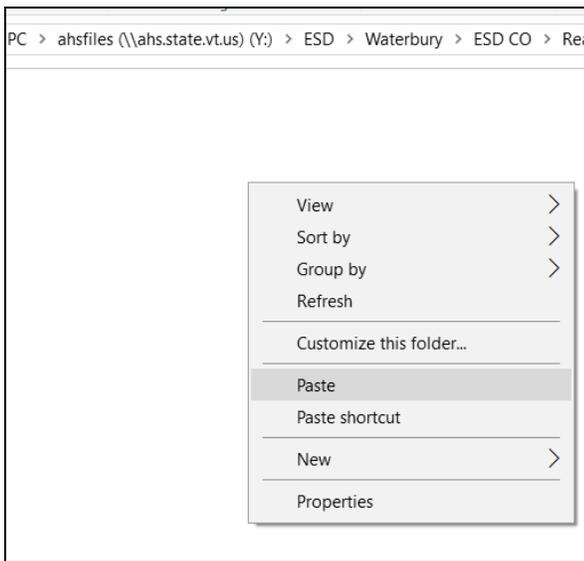
Open the "Template folder" and add the 6 brads to the "Template Folder". Right click, select "New", then "Folder". Name the folder Brad 1. Follow this process for Brads 2, 3, 4, 5, and 6. (Optional: You can add a description to each brad.)



To use the template: open the template, highlight the 6 brads, right click and select "copy". (To highlight the brads: select one brad, hold down the "shift" key and use the arrow to select the other brads.)

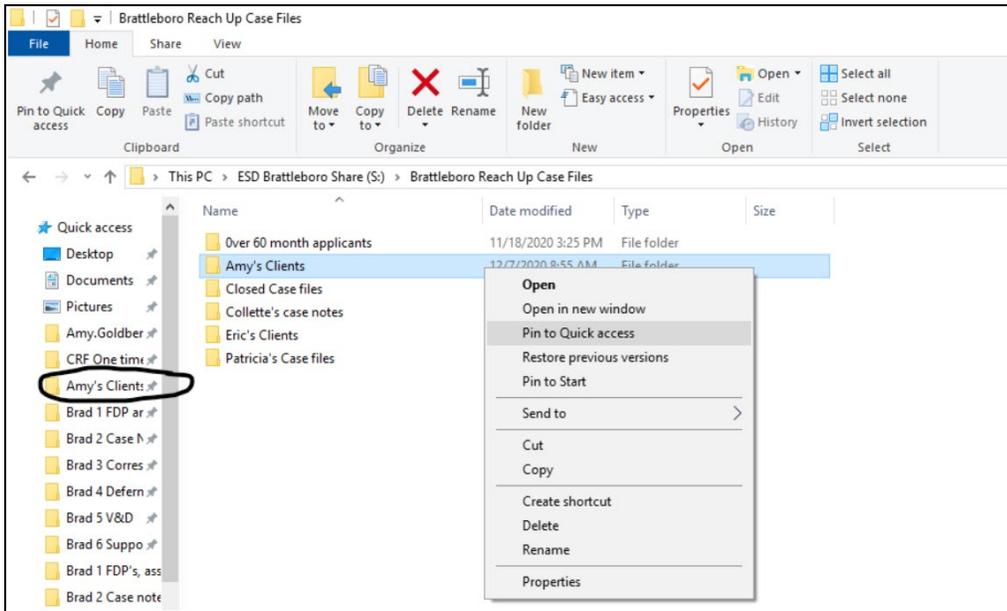


Open the participant's folder, right click, and paste the brads into the folder.

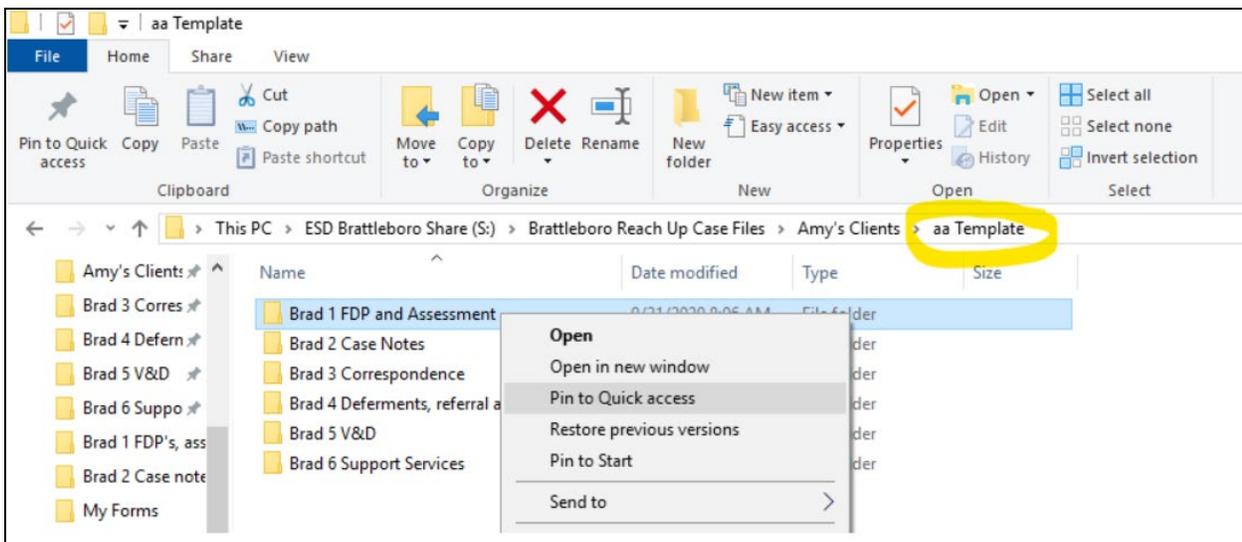


Setting Up Folders using Quick Access

Find the file you want to pin to Quick Access. Right click and select "Pin to Quick Access".



If you create a template with all brads in them, you can pin each brad to "Quick Access". (If you need help setting up a template ask your supervisor or email Reach Up Central Office AHS.DCFESDCOReachUp@vermont.gov.)



Then you can drag and drop from there to a participant file.

