Restricted Cases, SRs, and Incidents

Restricted Cases- General Information:

- Review if there is a need to restrict other **Cases** associated to the **Contact**. For example, based on the reason for the restriction to the **EA Case**, the **Health Case** may also need to be restricted.
- **Service Request** records can be restricted to a single user and their direct Supervisors in the system. Restricted records will not be available in any of the "All" views to anyone except for the Owner. Likewise, these records will not appear on any of the pick or MVG applets to anyone except for the Owner of the record.
- The **All Restricted Cases** view displays all **Cases** for your ministry and can be found on the **Cases** screen using the **Visibility Filter**. You are only able to view what you are allowed to view as determined by your profile.
- The **All Restricted Service Requests** view displays all of the Service Requests by ministry where the **Restricted Flag** is checked within the program area. This view is only available to Workers who have access to Restricted records through their Profile (for example, supervisors). This view displays all of the **Service Requests** by Ministry within program area, where the Restricted Flag is checked. You are only able to see what you are allowed to see as determined by your profile.
- The no entry sign means that the worker should not drill into the record.

Restricting a Case

Step	Action
1.	Find and drill into the **Case** you want to restrict.
2.	Click **Team** view tab.
3.	Click **Add**.
4.	Click **Query**.
5.	In **Last Name** and **First Name** fields, enter in the Employee's name who is to access the Case
6.	Click **Go**.
7.	Select the employee's record.
8.	Click **OK**. Repeat steps 3-7 for each employee that you want to have access to this Case. Note: you may want to include a person who profiles for the office.
9.	Click the **Show More** icon on the top right of the **Case Header**.
10.	In the Case Header section, check the Restricted flag. Restricted:
11.	In the **Restricted Type** field, select the appropriate reason. Restricted Type:
12.	In the **Restricted Reason** field enter your reason for the restriction.
13.	In the **Restricted Review Date** field, click the **calendar** icon , and select the date to review the restriction if it is to be reviewed prior to one year.

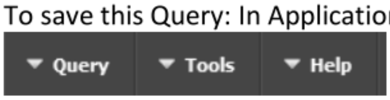
Restricting a Service Request

Step	Action
1.	Find the **Service Request** you want to restrict.
2.	In the **Owner** field, click the pick box.
3.	Click **Query**.
4.	In **Last Name** and **First Name** fields, enter in the employee's name who is to access the Case
5.	Click **Go**.
6.	Select the employee's record.
7.	Click **OK**.
8.	In the top left of the Service Request header, check the **Restricted** flag. Restricted: This will restrict the Service Request to only the Owner of this Service Request and their direct supervisor. Please note that any attachments associated with the Case, will still be seen on the Case > Attachments screen.

Restricting an Incident

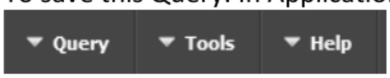
Step	Action
1.	Click **Incident** screen tab.
2.	Query for the **Incident** you want to restrict.
3.	In the **list applet**, click in the **Restricted** field. This puts a check in the box and a no entry sign will appear when saved. 

Set Up a Saved Query for Restricted Cases

Step	Action
1.	Click **Cases** screen tab.
2.	In the Visibility Filter, select **All Restricted Cases**. 
3.	Click **Query**.
4.	In **Case Type** field, select **Employment and Assistance**.
5.	In **Case Status** field, select **Open**.
6.	In **Office** field, enter your office.
7.	Click **Go**. This finds all the restricted Cases for your office that you have access to.
8.	To save this Query: In Application menu at the top of your screen, click **Query**. 
9.	Click **Save Query As**.
10.	In **Query Name** field, enter *Office Restricted Cases.
11.	Click **OK**.

Set Up a Saved Query for Restricted SRs

Step	Action
1.	Click **Service** screen tab.
2.	In the Visibility Filter, select **All Restricted Service Requests**. 
3.	Click **Query**.
4.	Click **Query Assistant**.

Step	Action
5.	In the first drop-down box, select **Service Office**.
6.	In the first drop-down box, select **Equals**.
7.	In the blank space, enter your office #.
8.	In the fourth drop-down box, select **Status**.
9.	In the first drop-down box, select **Does not Contain**.
10.	In the blank space, enter capital C.
11.	Click **Go**. This finds all the restricted SRs for your office that you have access to that are not Closed or Cancelled.
12.	To save this Query: In Application menu at the top of your screen, click **Query**. 
13.	Click **Save Query As**.
14.	In **Query Name** field, enter *Office Restricted SRs.
15.	Click **OK**.

Transfer a Restricted Case

Step	Action
1.	Find and drill into the restricted **Case** you want to transfer.
2.	In **Case** header **Service Office** field, click pick box.
3.	Click **Query**.
4.	In **Service Office** field, enter the office you are transferring the Case to.
5.	Click **Go**.
6.	Select the correct office.
7.	Click **OK**.
8.	Click **Team** view tab.
9.	Click **Add**.
10.	Click **Query**.
11.	In **Last Name** and **First Name** fields, enter in the new office Supervisor's name.
12.	Click **Go**.
13.	Select the Supervisor's record.
14.	Click **OK**. Repeat steps 3-7 for each employee from the new office that you want to have access to this Case (if you are aware of them).
15.	Select your name and click **Remove** to remove yourself from the list of Team members.

Step	Action
16.	Click **Activities** view tab.
17.	Click **New**.
18.	In **Description** field, enter “Restricted Case transferred, Supervisor to update Team members”.
19.	In **Priority** field, select **Urgent**.
20.	In **Type** field, select **Notification**.
21.	In **Due Date** field, select tomorrow’s date.
22.	In **Owner** field, click pick box and query for the Supervisor of the new office.
23.	Select the Supervisor, click **OK**.