Care Coordination

SERVICE PROVIDERS



Community Care NB Soins Communautaires

| USER GUIDE|

Version 0.3

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Version & Document Control Table

This version control table provides historical data about each update made to a document. It is useful to include the author, date and notes about each change made to refer back to what these changes were.

		Version Contr	ol
Version	Edited	Date	Changes
0.1	Amy Michaud	06/03/2024	First Draft
0.2	Amy Michaud	07/25/2024	Reviewed and edited content/ reformatted /added versions and confidential statement
0.3	Amy Michaud	07/31/2024	Define Service Requests / Defined Urgency Types



MODULE A2 – CARE COORDINATION

PURPOSE: Become familiar with the background and concepts of the CCNB platform.

Module Overview

CommunityCareNB (CCNB) is a digital platform for Service Providers to manage services and directly communicate with Social Development. CCNB allows for the information related to the people we share and serve to be all in one place. This guide will focus on the Care Coordination role within CCNB. To learn more about CCNB (purpose, icon definitions and basic navigation) refer to Module A1 – Introduction to CCNB Partner Portal. For information related to financial tasks, refer to Module A3 - Finance.

While working in CCNB with the Care Coordination persona, you will have access to various functions and features. These functions and features include:

- Receiving and responding to requests for service (e.g., SD worker, days, hours, what type of support), and relevant client information.
- Communicate with SD worker about incidents, changes, and to request changes to services
- Active and historical information will be visible in the same place for easy reference and review. These topics and more will be covered throughout the user guide.



Service Requests

A Service Request is created by a Social Development (SD) Worker. It contains information pertinent to the client such as: name, address, contact information, SD Worker, and much more. Additionally, the Service Request outlines the number of hours/days, the duration (start and end dates) of services, as well as the client's preferred days of the week.

If a Service Request should be terminated, paused, or modified request can be made by <u>Logging</u> <u>a Change Request.</u> A Service Request will remain viewable and actionable after it has been Paused or Terminated. This means that, if required, communication with Social Development (i.e., through service reports) can continue by accessing the relevant client's service request.

Lastly, a Service Request has different stages of viewable/accessible information and actionable items (e.g., logging an incident report).

- A <u>pending service</u> request will only provide basic information related to the service and the client's general location (client's name is not visible at this stage).
- An <u>accepted service request</u> will display all pertinent information (e.g., name, address, etc.) however, you will not be able to log service reports (incident and observable changes) or request changes to service.
- Activated service requests will display the same information as an accepted. The difference between the two is that an activated service request will display the following buttons:
 - Log an Incident Report (Service Report)
 - Log an Observable Change (Service (Report)
 - Log a Change Request

All service requests (with the exception of declined) are found under the **Service Request** tab.

IMPORTANT: Home Support Initial Assessment and Meal Services CANNOT log Service Reports (incident reports and observable changes).



Pending Service Requests

A Pending Service Request is a service request that has been offered by Social Development and requires review. Access the Service Request tab to view and manage pending service requests and basic client information such as: contact information, Primary SD worker, service request details, notes to service provider, preferred schedule, etc.

The following topics will cover how to accept, decline, view and add comments to offered/pending service requests.

View Pending Service Requests

To locate and view basic and essential information on a pending service request, follow the steps below:

1. From the homepage, select the Service Requests tab.



2. The **Pending** tab is automatically displayed. This tab displays only the Order Number, Start Date, Status and the Zone.





3. Select the **Order Number Hyperlink** to open the offered Service Request.

PERSONAL SCOVE TENENATED		
My Pen g Services Requests		

4. The Offered Service Request opens and displays the necessary information required to either **accept** or **decline** (i.e., contact information, assigned SD worker, service request details, notes to service provider, preferred schedule).

SR-00000493		Assigned SD
liutua	Olivert 1D	Worker
Offered	001Au00000QCKMEIAP	Megan McCanv
Contact Information		
Postal Code	Zorn	Service Remeat
	Zone Cantral	status
Preferred Language (Spokeni)	Preferred Largeage (Writher)	Status > Offered
English	English	Would you like to accept
		or decline this Service Research?
Service Request Details		-Nere-
Start Date	Erel Date	and the second s
March 1, 2024	Petroary 28, 2025	Next

NOTE: If ever a client's worker needs to be confirmed or contacted, open the service request and the SD worker will always be current.



Accept Service Requests

- 1. Locate and open an **Offered Service Request** found under the pending tab.
- 2. Once opened and reviewed, locate the Service Request Status field.

Server Present		
Bistus Officeat	Classi ID 0014,000000038MiA P	Assigner D Worker Megar McC
Contact Information Rula Cule	2000 Zone Cantral	Service Request status
Perferent Language (Spokan) English	Podered Language (McNee) Digitali	Stratule + Differend - Wissuld your Sker by ancept or decliner this Service Respond?

- 3. Select the dropdown menu with "- -None- -" displayed.
- 4. Select "Accept request".





- 5. Click the **Next** pushbutton.
- 6. A verification question will appear in the **Service Request Status** field. *Optional: include a message for Social Development.*

Service Request	
status	
Are you sure you want t	2
accept this service request?	
Optional message for	₹
Social Development	ł
	/
Cancel]
Commission Commission	

7. The **Service Request Status** is updated to **Status = Accepted**.

NOTE: Client demographic information is now available.

	Disab	ility Support Serv	ices
Service Register SR-000004 Instat Accepted	193 Here Study Ave Communit	Court (b) On Autocopy status a	Assigned SD Worker Mean MiCane
Demography For tares Shale	ic Information	See Orliet	Service Request status
Last Name Company		Age 87 ptectol asserted	Plana - Accepted

Decline Service Requests

Select decline if unable to accommodate the full request (e.g., total number of hours) OR select decline and add a comment indicating what can be provided.

- 1. Locate and open an **Offered Service Request** found under the Pending tab.
- 2. Once opened and reviewed, locate the Service Request Status field.
- 3. Select the dropdown menu with "- -None- -" displayed.

D	isability Support Servic	es
Service Request SR-00000557		Assigned D
Distoit Offered	Civent ID 001AL000000Q3PHIRUX 1	Worker Arreporting
Contact Information		
Popul Code	Zine Zine Costal	status
Preferred Language Cloukers	Professional Languages (Vertices)	Batus - Offered
heid	handh	accept or decine this Service Request?
Service Request Details		1.000

4. Select "Decline request".

Service Request	
status	
Status = Offered	
Would you like to	
accept or decline this	
Service Request?	
None	
None-+	
Accept request	4



- 5. Click the **Next** pushbutton.
- 6. (1) A verification question will appear in the Service Request Status field.

(2) *Optional:* include a message for Social Development. If partial services are possible, provide request information here.

Service	Reques	st
status		_
Are you so decline the request?	ure you wan his service	nt to
Optional r	message for	r
Social De	velopment	8
		_
-	Cance	el
Dec	ine reques	st

7. The **Service Request** is no longer displayed, and the Homepage is displayed.

NOTE: Service requests are no longer visible once declined; however, pending, active, and terminated service requests can be viewed in the service reports section.



Accepted & Active Service Requests

Once a Service Request has been activated by the SD worker, several functions and features will become available. This section of the user guide will cover how to navigate and view a Service Request and showcase the differences between an Accepted and Active Service Request.

IMPORTANT: A service is approved to be delivered ONLY once status is activated by Social Development.

Navigating & Viewing

- 1. From the homepage, select the **Service Request** tab.
- 2. Once the window is displayed, select the **Active** tab. The Active tab displays **BOTH** Accepted and Active service requests.

ACTIVE ACTIVE TERMONATES My Active Service Requests terms: holds: 0.0000445 teated to see the formed to see the second to a former of the field. (7) Coder Number 1 - Accessed Name - Order Start Date - Startes - Accessed to a former of the field. (7) Coder Number 1 - Accessed Name - Order Start Date - Startes - Accessed to a former of the field. (7) Coder Number 1 - Accessed Name - Order Start Date - Startes - Accessed to a former of the field. (7) Coder Number 1 - Accessed Name - Order Start Date - Coder - Startes - Coder			Carlo Carlo				
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Conder Number 1 - Account Name - Conder Start Date - Conder S	My Ac	tive Service R	equests				
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1 00000445 tradeole Maria Binulay 2004-03-01 Accounted Accounted s 00000446 Polly Arms Wrogg 2004-03-01 Accounted Zook Southwest s 00000466 Taylor Kalawy Switt 2004-03-01 Accounted Zook Southwest		Order Number 7 -	Account Name	- Order Start Date	Status	Zone	- W
2 00000466 Putly Area Wage 2004-03-01 Accepted Zon Sociewest 1 00000464 Taylor Kalvey Switt 2004-03-01 Accepted Zone Central	1.0	00000445	teatisite Maria Brukey	2024-03-01	Activated		
a 00000464 Taylor Kalsey Switt. 2004-03-01 Accepted Zive Central	.1	00000446	Polly Arma Wogg	3004-00-01	Accepted	Zone Southwest	
		00000464	Taylor Kelsey Smith	2004-03-01	Accepted	Jone Cantral	
a 00000485 Michael Alar Patternet 2004-05-05 Retivated Zone Cantral	1	00000485	Michael Alar Patternet	2024-03-05	Activated	Time Central	
		00000477	Patricia Jane Lallianc	2024-03-01	Activated	-Zone Central	

3. An **ACCEPTED** Service Request displays client demographic information, and any other information related to the services. <u>NO</u> actions (i.e., log service reports) can be performed until a service request has been activated by Social Development.



Disability Support Services					
Service Request SR-000004 Status Accepted	46 Hame Polly Arms Weag	Classit ID 0014-000000Q3b9-14	Assigned SD Worker		
Demographic Feat Name Poly	c Information	D Date Of Birth April 20, JD14	Service Request status		
Last Name Weat		Ager 9 year (UTIC) manshold	Bratus + Accepted		

4. An **ACTIVE** Service Request displays same information as an Accepted Service Request **however**, actions related to the client (i.e., log service reports) are now available.

Service Request SR-00000445 Datus Actuated Isabelia Marie Boulay Direct ID Change Log on Observable Change Log on Observable Change Log on Observable Change Request		Disab	ility Support Serv	ices
District Al (Traited) States Boulary District ID 001Au00000PQublick D Descenses object Information	Service Request SR-000004	45		Log on Incident
Remaining Information	Dunie Alti-Mel	tiane tudele Marie Boolay	Client ID 007Au00000PQplantA 0	Change Log e Change Request
Demographic information designed SD	Demographie	c Information		Assigned SD



Service Reports

Once a Service Request has been Activated by Social Development, three features to support ongoing communication and collaboration between the service provider and Social Development will become available: Incident Reporting, Observable Change, and Change Request.

When an **incident** occurs with a client, it needs to be reported to Social Development. This can now happen within CCNB via the partner portal account. This new digital incident reporting has items that auto-populate and drop down menus to make it easier to complete and monitor trends.

In addition to incident reporting, service providers can now share pertinent information about a client that is not an incident but could be an early warning sign or a positive achievement. This new feature is called, **log an observable change**.

Additionally, Service Provides now have the ability to **request a change** to the client's service such as adjustments in hours of service, temporary pause of service, and end service.

All of these tasks are completed by first opening the relevant active or terminated service request. When any of these three services reports are logged, it will notify the primary worker.



Log an Incident Report (Active or Terminated)

- 1. Locate and open the applicable Active or Terminated Service Request.
- 2. Once on the Service Request Details window, select the Log an Incident pushbutton.

			Contraction of the local sector
	Disab	ility Support Serv	ices
		22 2502	
SR-000004	45		Log on Incident
Dutus Activited	Hanne Instantio Marie Bouline	Classi (2) 001A-000000PGptorA 0	Change Lag a Change Request
Demographi	c Information		and the second second
			Augred SD

3. A pop up window will appear where the **Incident** details are captured. All mandatory fields are indicated by a red Asterix (*).

-		Service Report Great		
· Report Datable				
Available .	Ounar	- Annalastia	Deter	
Personal and	i'	Performant	CORT Front And	
ment to Houghd		Particular	interpret to burn.	
Report from Hengelid		Calvertit		
·		Description	el deciment Talanta 🖶	
Subarda a		Reported to	contract #	
		Dec #		
- Normal-		-549	-1996	
				P. /



4. For the **Type** and **Action Taken** list boxes, the same action will be performed in order to log the incident and action taken. Begin by selecting the relevant item under **Available**.



5. Select the **forward arrow** (▶) located between the Available and Chosen list boxes. Once clicked, the selected Available item will be moved over to **Chosen**. This will have to be done individually for all applicable Type and Action Taken items.

	Service	Report Create	
 Report Details 			
Type O		Actions Taken	
walable	Chosen	Available	Chosen
Person passed away	Werkt to Hospital	Performed CPR / First Aid	Called 911
Return from Hospital	*	Instructed caregiver to leas	•
Admitted to Hospital		Called Client	
Description 0		Description of Actions Taken 0	5

6. The description field for "type" of incident will require a detailed description of the incident (e.g., if **Fall** is selected, describe how and where they fell, and if this has happened before). The Description of Actions Taken field is optional.

Note: Items that have been moved to the **Chosen** field can be removed by selecting the item in that field and clicking on the back (\blacktriangleleft) arrow.

7. Complete the following fields by selecting **Urgency** and **Place** (i.e., where the incident occurred) from the dropdown lists.



- figures 0	Projection Occurrency:
Place B	Date • "Date *Tone
Description of Place.	4 0
•	C.
~ Parther Information	
*Reported By O	
Other Propin Insulant, 0	

8. Complete the **Date** and **Time** fields. Select the **Repeated Occurrence** and **Follow-up Required** checkboxes if applicable. If the Social Development worker should contact the Agency, please select **follow up required**.

"Litgency O	Repeated Desurvence
-H ₀₀₀ 0	Date O *Date *Tang
Description of Place O	a 0. False-up Required ®
 Purther Information Reported By 0 	
Other Patgle Involved 0	

9. Indicate who it was **Reported By**, and any other people involved.

urther Information		
Jorted By O		
r People Involved O		
		-
		1

NOTE: The Client or SD worker's name do not need to be included. The Incident Report is automatically attached to the client's Service Request, and the report will go directly to the SD worker assigned to the client.

- 10. Select the **Next** pushbutton.
- 11. A Confirmation pop up message will appear. Select the **Finish** pushbutton to complete and close.

(and) (and	
Service Report Create	
DSS Creats New Service Report Incident)	
Thursh you, the incluted incurring at 2024 02-08, 11-49 a.m. related to have been recorded.	
5-14-14-14-14-14-14-14-14-14-14-14-14-14-	- Point
That II sees	



Log an Observable Change (Active or Terminated)

Observable changes are not incident reports, but other information the service provider feels would help important for SD worker to know. This information can be positive or negative. Observable change template is similar to an Incident Report. Separating these functions makes it easier for SD workers to triage and respond appropriately.

- 1. Locate and open the applicable Active or Terminated Service Request.
- 2. Once on the Service Request Details window, select the Log an Observable Change pushbutton.

Service Request SR-00000445			Log an locate
Status Name Astronom Sabelle	Mane Boutay	Client ID DOTA-000000PQpeerA D	Log a Change Request
Demographic Information			Acciment CD
First Name		Date Of Bath	Worker
Isobella		May 14, 1900	HIGHNOT
Last Name		Age	Army Michskotl

3. A pop up window will appear where **Observable Change** details are captured . All mandatory fields are indicated by a red Asterix (*).

Service	Hepart Greate		
Change in Cognitive	Description of Action Repeated Octurners	ra Taker Ø	
Description	Follow-up Required	8 0	0
- None			



4. In the Type field, select the Available observable change. Once selected, move it to Chosen by clicking the forward arrow (▶) located between the Available and Chosen list boxes. Once clicked, the selected Available option will be moved over to Chosen. Do this individually for all applicable observable changes if more than one applies.

Report Datain			
Type O	Destruction of	Actions Takeni Ø	
Change in Mobility			
Change in Cognitive	Repeated Oct	semence 0	
Mental Health	Date Ø	1 Time	
·			0
	folow-up Ner	puired O	
Place 0			
-Norm-			
Neutriation of Place O			

- 5. Provide a detailed **Description** of the observed change including who was notified.
- 6. Indicate where the observed change took **Place** and provide additional information in the **Description of Place** text field.

Report Details				
"Type Ø		 Description of A 	Actions Taken 0	
Available	Chasen			
Change H Cognitive Change in Physical Health Change in Diet	Mantal Heath	Repeated Occur	rence 0	
Description @				٢
Describe the incident/observat notified, requested follow up a	ble change in detail including who w action from SD, and any service losue	nFallow up Requi	ired O	
"Rate 6		2		
Client Home Indoors				
Description of Place -0				
Indicate any additional interate	out the location where the			

- 7. Provide a **Description of Actions Taken** if applicable.
- 8. Capture the **Date** and **Time** of the observable change.
- 9. If applicable or necessary, select the Repeated Occurrence or Follow-up Required checkbox.

 Report Details 			Concernance of Array	inne Taken Ø	
Available		Chosen	-		
Channes in Consulting		Montol Health			
	- C.,		Repeated Octure	nce O	
Change in Physical Health			10		
Change in Diet	- U		Data Data	'Time	
Description 0					0
			Follow-up Require	0 5	
notified, requested follow	up action t	rom SD, and any service is	sies.		
"Place 0			0		
Client Home-Indoors			*		
Description of Place O					

10. In the **Further Information** section, indicate who the incident was **Reported By** and select the Next pushbutton.



11. A Confirmation pop up message will appear. Select the Finish pushbutton to complete and close.

	Service Report Create	
959, Douris, Sino, Jihorrosthi, Daurge Thank you, the resident occurring at 2524-3 0-4	N. S-AQ a.m. related to have been incomfact	Free
ion 0.3		Page

Community Care Soins Communautaires

Log a Change Request

When the need to make adjustments to a client's service is presented, CCNB provides Service Providers with the ability to log change requests (i.e., modify, pause, end) directly to Social Development. For example, the need may arise from a service provider's observations, at the request of the client, or based on changing needs identified by the SD Worker. This feature is intended to make it easier for service providers to initiate and document the request to change.

- 1. Locate and open the applicable Active or Terminated Service Request.
- 2. Once on the Service Request Details window, select the Log a Change Request pushbutton.

entes Request GR-00000445 tatue Name Cont ID crivered balance Request D Contactor Request Contactor Re		Disab	ility Support Serv	ices
terner Name Control D churant taatetie Marie Busky D DOUGLOCODOTOphank D D Permographic Information rst Name Date (7) Both D	SR-000004	45		Log an Int
Remographic Information Assigned SD	Basa Activitat	Name Isolate Marie Deviay	Client ID 001Au000000PQptuAA D	Log a Change Request
int Name Date Of Birthy	Demographic	Information		Assistant 60
Worker	First Name		Date (H Brits	Worker
			Area -	Any Micheud

3. A pop up window will appear where **Change Request** details are captured. All mandatory fields are indicated by a red Asterix (*).

	Service Report Create	
Category 0		
-hone-		
hyulahle	Choosy	
Description O		
		Next



4. Select the **Category** from the dropdown menu. The available types will populate in accordance with the chosen category.

-None-	
v* -None-	
Adjust Service	
Pause Service	
End Service	
Description O	
1999 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 -	

In the Type field, select the Available Change Request Type. Once selected, move it to Chosen by clicking the forward arrow (▶) located between the Available and Chosen list boxes. Once clicked, the selected Available option will be moved over to Chosen.

	Service R wit Create	
angery O		
Adjust Service		
Type 0	L	
uslatie	Chosen	
Person Requesting Decrease Service	1	
Agency Requesting Decrease Service		
Person Researches Increase Terrore		
A REAL PROPERTY AND ADDRESS OF A DECK		
	Service Report Create	
	Service Report Create	
under 0	Service Report Create	-
Jalegory Ø Pause Service	Service Report Create	
Talegory @ Pause Service Type @	Service Report Create	
Tatingory © Pause Service Type © Valiation	Service Report Create	
Tategory © Pause Service Syste © valiable Person Pequesting Pause Service	Service Report Creete	
Sategory © Pause Service Syste © validatio Person Requesting Pause Service Assesses Requesting Pause Service	Service Report Creete	-
Angory 0 Pause Service Type 0 valiable Parant Requesting Pause Service Agency Requesting Pause Service	Service Report Creete Chases	-



	Service Report Create	
angery 0		4
End Service		
Type O		
lvalatile	Chosen	
Person Requesting End Service		

6. Provide a description of the change in detail and the reason for the change request.

ne <mark>.</mark> 0		
Ad Service .		
	Chosen	
Per Requesting Decrease Service	Person Requesting Vicinase Service	
Age Requesting Decrease Service		
And Analysisting Increase Service		
Respiration 0		
Describe the change in detail and the reason for the chang	pi reduced.	

7. A Confirmation pop up message will appear. Select the **Finish** pushbutton to complete and close.

#ceimment Sci	
	Finish
	Account S21



Logged Service Reports

Whenever an Observable Change or Incident is logged, the service report can be accessed either through an individual's Service Request or through the Service Reports tab on the Homepage. This also applies to Change Requests that have been logged on behalf of the client or by the agency.

Open Client's Service Report

When searching for a specific client's Service Report, the most efficient way is to access the Service Report(s) through their individual Service Requests.

- 1. Navigate to and open the applicable client Service Request (re: <u>View Service Requests</u>)
- 2. Once on the Service Request, scroll down and locate the Service Reports field.

	Suesky	Wadequiling	Manual Advances
Angeline Product	tion of the second s	Any long	
Dennes Annes (Record Tate	Tan	Ogano
58-00107 08-00108	Change Research Change Research	Person Requesting recessed.	NU. 19.5
an ann an	Uninge Response Uninge Response	Parate Respecting Increase.	N9.5

3. Click the applicable Service Report Number hyperlink.

Service Report Number	Record Type	Туре	Urgency
SR-000147	Change Request	Person Requesting Increase	N/A
5R 000138	Change Request	Person Requesting Increase	N/A



- 4. The **Service Report** is displayed.
- 5. To see all Service Reports relating to the service request, click the View All button.

rvice Report Nu	Record Type	Туре	Urgency
R-000147	Change Request	Person Requesting In	N/A
R-000138	Change Request	Person Requesting In	N/A

6. The **Service Report List** for <u>that</u> service request is displayed. From this list, select the applicable **Service Report Number** hyperlink.



Open Service Report List

The Service Report List that is accessible from the homepage, will display **ALL** service reports that have been logged for all clients (Active & Terminated). To view this list, follow the steps below.

1. From the homepage, select the **Service Reports** tab.

funiwick	Disability Sur	poort Se vices	EL.
	SERVICE REQUESTS	SERVICE REPORTS	

- 2. The Service Reports list is displayed. From here, all Service Reports and their record type, incident or observable change, urgency and date create are viewable.
- 3. Select the Service Report Number hyperlink. Sort the List by using the column headers.

			Dischilling Course	-	Contract of the local division of the local		
			Disability Supj	ports	ervices		
100	NAME OF TAXABLE	-					
ALS S	ervice R	eports					
		2020					
-	former for families	Survey and Advances of				S. Barristania	. e
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	-	Income Page 1	The () much distant to institution	(Append	Distance, and the		
	-	Quantumble Changel.	Change or Long Americansti	i, in	010004340FM		
۰.	pe-labl.	Incident Report	Read to installabilities to install input	YEAH	21210314-836-686		
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+	-	Strenatic Darge	Darige it (blasse	line .	31403034, 8-0148		
	-	include Report	Fairturgittai	1140	grouppin sparred		
	-	Unamable Change	Darge & Malify Charge in Physical Health	lan-	pressure statem.		
1		Change Resource	Parket Residence by Parkets Service	75-0	#3/3/06# Y42 PM		

Conclusion

By completing this module, you have covered:

- What is Care Coordination
- Navigating Service Requests
- Pending Service Request Accept or Decline
- Accepted vs Active Service Requests
- How to log a Service Report (Incident, Observable or Change Request)
- Viewing Historical Service Reports

