



# eCornerstone

[www.iphca.org/eCornerstone/implement.htm](http://www.iphca.org/eCornerstone/implement.htm)

## eCornerstone: A Comprehensive Case Management Tool

With the December 15, 2003, release of eCornerstone version 1.1.4, the system has evolved into a comprehensive case management tool. eCornerstone tracks participants from the time of intake, through building a case plan, until the case is closed. Users can look forward to future enhancements to the eCornerstone system, and it is hoped that users will continue to provide input as to how eCornerstone can become an even more effective tool for the programs of the Division of Community Health and Prevention.

It is important to realize that the case plan module is used to manage participants enrolled in Youth Services programs, and that eCornerstone is not to be used as a replacement for case managers using their knowledge and experience in determining what is best for their participants. Even though eCornerstone offers features that make a case worker's job easier, input from the program participants must continue to provide the foundation for individualized case plans. Additionally, the skills and knowledge of case workers will never be replaced by eCornerstone. Please keep in mind that many hours of face time must be spent with a participant prior to building a case plan. Thereafter, the case plan uses information from the YASI Assessment and the participant's program to set goals, action steps, and selected services for the participant. However, it is important to remember that eCornerstone is simply a tool to help fulfill the needs of program participants. It is up to the worker to continue to use his or her discretion and professional judgment to create a plan that best fits the needs of the participant.

Following is an overview of how the eCornerstone system may be utilized...from participant intake to case closure.

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PLEASE NOTE: Important information regarding the eCornerstone system is communicated through emails from [ecornerstonesupport@iphca.org](mailto:ecornerstonesupport@iphca.org), and is posted on the Illinois Primary Health Care Association's eCornerstone Web site at <http://www.iphca.org/eCornerstone/implement.htm>. **As you receive information, please read it carefully, and share it with other eCornerstone users at your site.**



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## Adding a New CCBYS Participant into eCornerstone

The following instructions describe the process of adding a CCBYS participant into the eCornerstone system:

### 1. The Lookup Function

When adding a new participant into the system, the user must first perform a lookup by selecting the "Lookup" link on the Navigation Menu. This procedure ensures that a duplicate participant is not inadvertently entered into the system. Please refer to the Participant Lookup chapter of the eCornerstone Reference Manual for detailed instructions.

### 2. Preparing the Participant for Intake

Participant intake is comprised of several screens. The user first completes the Preparing Participant for Intake page, which captures basic information pertaining to the participant, including name, date of birth, intake date, gender, consent status, social security number, address, and county. Upon saving this page, the system then displays the Demographic section. The four screens comprising the Demographic section allow the user to collect more detailed aspects of the participant's demographic data.

Consent is also addressed during intake. The eCornerstone Informed Consent Form is to be completed and signed for every participant who is new to an eCornerstone agency. This includes participants who are new to the agency either through transfer or referral. One general eCornerstone Informed Consent Form is required per agency for a participant, regardless of program participation.

Another aspect of participant intake is Family and Support Contact. The Family and Support Contact page is used to gather information about people associated with the participant.

The System Cross Reference page may also be used during intake, at the choice of the agency. This page is used to add a local ID number from another computer system currently being used by the agency.



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Completion of these screens captures all needed data for a participant. Please refer to the Participant Intake chapter of the eCornerstone Reference Manual for detailed instructions.

### 3. YASI Pre-Assessment/Full Assessment

Following intake, a Pre-or Full YASI Assessment may be completed. The YASI Pre-Assessment is administered to all applicable participants within two weeks of the initial referral. This includes all Limited Custody and Non-Mandatory referrals. The Full Assessment will be completed within 30 days of the referral for all cases scoring “medium” or “high” on the Pre-Assessment version. This process is completed for all Limited Custody and Non-Mandatory referrals. Please refer to the Assessments chapter of the eCornerstone Reference Manual for detailed information regarding the administration of YASI Assessments.

### 4. Program Enrollment

Once the participant intake information and the Assessments are complete, the Program Enrollment page is used to enter (enroll) a participant in one or more programs. The Program Enrollment page is accessed from the Participant View page.

The Program Enrollment chapter of the eCornerstone Reference Manual describes in detail the procedures for the following program enrollment functions:

- Adding a program record (enter/enroll a participant in a program)
- Performing an agency lookup
- Manually entering the referring agency information
- Updating a record
- Terminating a record
- Viewing a participant’s program history

### 5. (Re)Assign Participant

Following program enrollment, the participant may be assigned to a case worker using the Re(Assign) Participant page, which is accessed from the Participant View page. The (Re)Assign Participant chapter of the eCornerstone Reference Manual provides detailed instructions for this procedure.



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## 6. Building a Case Plan

eCornerstone captures the case plan designed by the case worker and participant. The case plan uses information from the YASI Assessment and the participant's program to set goals, action steps, and select services for the participant. The participant will agree to work on mitigating some or all of the risks to try to achieve an agreed upon goal or goals through a set of one or more action steps and services.

A case plan may be developed for a participant after all of the following three criteria are met:

1. The participant is enrolled in a Youth Services program.
2. The participant is assigned to a case worker.
3. The participant has a full YASI assessment.

The Case Plan chapter in the eCornerstone Reference Manual provides detailed instructions on how to build a case plan.

## 7. Accepting a Case Plan

Once a case plan is entered into eCornerstone, the case plan must be presented to the participant and/or their legal guardian for approval. Once the participant and/or their legal guardian has signed the printed Case Plan Agreement, the user will select the "Accept/Lock" button. Please keep in mind that once the "Accept/Lock" button is clicked, the system will no longer allow changes to the current selections within the case plan. The user will be able to add **additional** Assessment domains, goals, and action steps, but will not be able to remove selections prior to when the case plan was accepted/locked. Please refer to the Case Plan chapter in the eCornerstone Reference Manual for important information and detailed instructions for this process.

## 8. Reviewing a Case Plan

The progress/status of goals within a case plan should be reviewed periodically, based on parameters established when setting goals during the building of the case plan. For detailed instructions on reviewing a case plan, please refer to the Case Plan chapter in the eCornerstone Reference Manual.



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## 9. Closing a Case Plan

Closing a case plan is accomplished via the Close Case Plan page, which is accessed from the Case Plan Overview page. There are a variety of reasons why a case plan should be closed, and the Close Case Plan page allows the user to select the appropriate reason why the participant is no longer participating in the program. Please refer to the Case Plan chapter in the eCornerstone Reference Manual for detailed instructions on closing a case plan.