



The screenshot shows the Microsoft D365 Agent Assist interface. At the top, there is a search bar labeled "Search Cases and more" and a "SANDBOX" indicator. Below the search bar, there are several action buttons: "Show Chart", "New Case", "Delete", "Refresh", "Run Report", "Email a Link", "Visualize this view", "Flow", and "Share".

The main content area displays a table of cases with the following columns: "Created On", "Modified On", "Consumer", "Client ID (Co...)", "Case Number", "Status", "Origin", and "Owner". The table contains several rows of case data, including details like dates, consumer names (e.g., Pinkman, Jesse; White, Elsa; White, Apple; Levy, Lynn Car...; Zucko, Danny; Yennala, Shruthi; Mouse1, Mickey; Yennala, Shruthi; Yennala, Shruthi; Yennala, Shruthi; Mouse1, Mickey; Yennala, Shruthi), case numbers, and statuses.

On the left side, there is a sidebar with a "Site Map" containing 19 numbered items:

- 1. Agent Assist
- 2. Site Map (hamburger menu icon)
- 3. Recent
- 4. Pinned
- 5. Active ACCESS Cases
- 6. Cases
- 7. Consumers
- 8. Provider Search
- 9. DCFS
- 10. Medi-Cal
- 11. LPS Search
- 12. Dashboards
- 13. FIT Dispatch
- 14. Patients Rights and Griev...
- 15. Referrals
- 16. Non-Responses
- 17. Knowledge Articles
- 18. Feedback
- 19. Appointments

## Navigate the Site Map

1. Open the **Agent Assist** app. The system opens with the “**My Active ACCESS Cases**” table view.
2. Expand the **Site Map** to navigate across tables such as Cases, Consumers, Dashboards, and more.

## Recent and Pinned Records and Tables

3. Expand **Recent** to view recent records.
4. Expand **Pinned** to view pinned records and tables.
5. Click the **Pin icon** in the Recent list to pin or unpin records and tables.

## Service Section

6. Click **Cases** to quickly access the table of Case records.
7. Click **Consumers** will provide access to all consumer records. By system default, the “All Active Consumers” table view appears.
8. Click **Provider Search** to search by an address or provider name/number and search across outpatient or inpatient providers.
9. Click **DCFS** which will open in a new browser to log into the DCFS Referral Portal.
10. Click **Medi-Cal** which will open in a new browser where you can search for a Caller’s Medi-Cal status.
11. Click **LPS Search** to view the LPS Search (Access Center).
12. Click **Dashboards** to quickly view analytics, insights, and data across various records such as Cases and Resources.
13. Click **FIT Dispatch** to navigate to the “Awaiting Dispatch” table. Switch the table view to see records for Completed, Dispatched, No Dispatch, and Team Assigned.
14. Click **Patient Rights and Grievances** to view Patient Rights and Grievances Submissions.
15. Click **Referrals** to view Referrals created by you.
16. Click **Non-Responses** to view All Non-Response records.
17. Click **Knowledge Articles** to navigate to the library of Knowledge Articles.
18. Click **Feedback** to access all feedback and comments on Knowledge Articles.
19. Click **Appointments** to navigate to all appointments ranging from Available, Booked, Canceled, DO, and LE appointments.



For additional resources, visit the Adaptive Learning Platform.

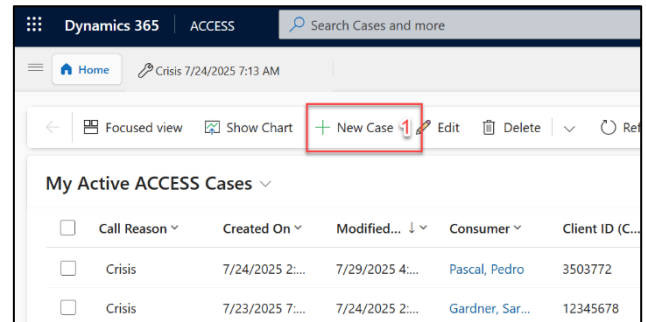


## Create and Save a Case



Note: The following scenario will be a generic example of how to create a case. For specific training scenarios, please refer to a different quick reference guide with the respective training scenario.

1. From the **Home Page**, click **+New Case** in the Command bar.



2. Gather the **Caller Information**.
3. In the **Call Reason** field, input the desired call reason.



Note: If you select a different call reason, the form fields will have different mandatory fields.

4. In the **Reason for Call** field, document the reason for call.
5. In the Consumer field, select **Look Up Field**



Note: If you need to search for an existing consumer, type their name in the Search field. If you need to create a new consumer, click + New from the Consumer lookup field and fill in the Quick Create form.

6. Once a Consumer is selected, check that the data has populated in the **Consumer Information** section.
7. In the Command bar, click **Save**.



## Utilize Agent Scripts within Cases

1. On the case record, to the right side of the screen, navigate to **Scripts icon**.  
A Scripts pane will appear to the right.
2. Use the **dropdown menu** to select the script category.
3. Click the **arrow** to the left of the script title to expand or collapse the script.

The screenshot displays the Microsoft Dynamics 365 ACCESS interface for a case record titled "Appointment Scheduling 7/15/2025 2:35 PM - Saved". The interface is divided into several sections: "CALLER INFORMATION", "CASE SUMMARY", "CONSUMER INFORMATION", and "Scripts".

- CALLER INFORMATION:** Reporting Party First Name, Reporting Party Last Name, Reporting Party/Relationship/Agency, Reporting Party Relationship Description, Call Back Number.
- CASE SUMMARY:** Origin (Phone), Case Number (CAS-39546-J9P0Z1), Call Reason (Appointment Scheduling), Is this an emergency or crisis situation? (No), Reason for Call (test).
- CONSUMER INFORMATION:** Consumer (Doe, Jay S), Mobile Phone ((818) 458-9759), Gender (M), Date of Birth (4/30/2006), Client ID (3503878), Medi-Cal #.
- Scripts:** A dropdown menu is open, showing "Standard Greeting" and "Opening Greeting". The "Opening Greeting" script is expanded, displaying the text: "Hello/Good Morning/Good Afternoon, this is the Los Angeles County Department of Mental Health - ACCESS Help Line. My name is (Employee's First Name) or You are speaking with (Employee's First Name). We offer interpreter services, do you need an interpreter? Is this a crisis? May I have your name and phone number in case we get disconnected?".

Red boxes and numbers 1, 2, and 3 highlight the Scripts icon, the dropdown menu, and the expand/collapse arrow respectively.




For additional resources, visit the Dynamics SharePoint Site.



## Resolve a Case

1. From a case record, in the Command bar, click **Resolve Case**.
2. A Case Resolution window appears. Enter the following information: Final Disposition, Disposition Comments, and Information Provided. Then, click **Resolve**.

 Note: Final Disposition Options are based on the case type.

3. After you resolve the case, the Case record will return to “**Read-Only**” and the status is “**Resolved**.” You cannot edit any additional information. If you need to reactivate the case (put in back in Draft), please reach out to your (or an available) supervisor.
4. To view the Case Closure details, navigate to the **Details** tab.
5. In the Case Closure section, review the details.

