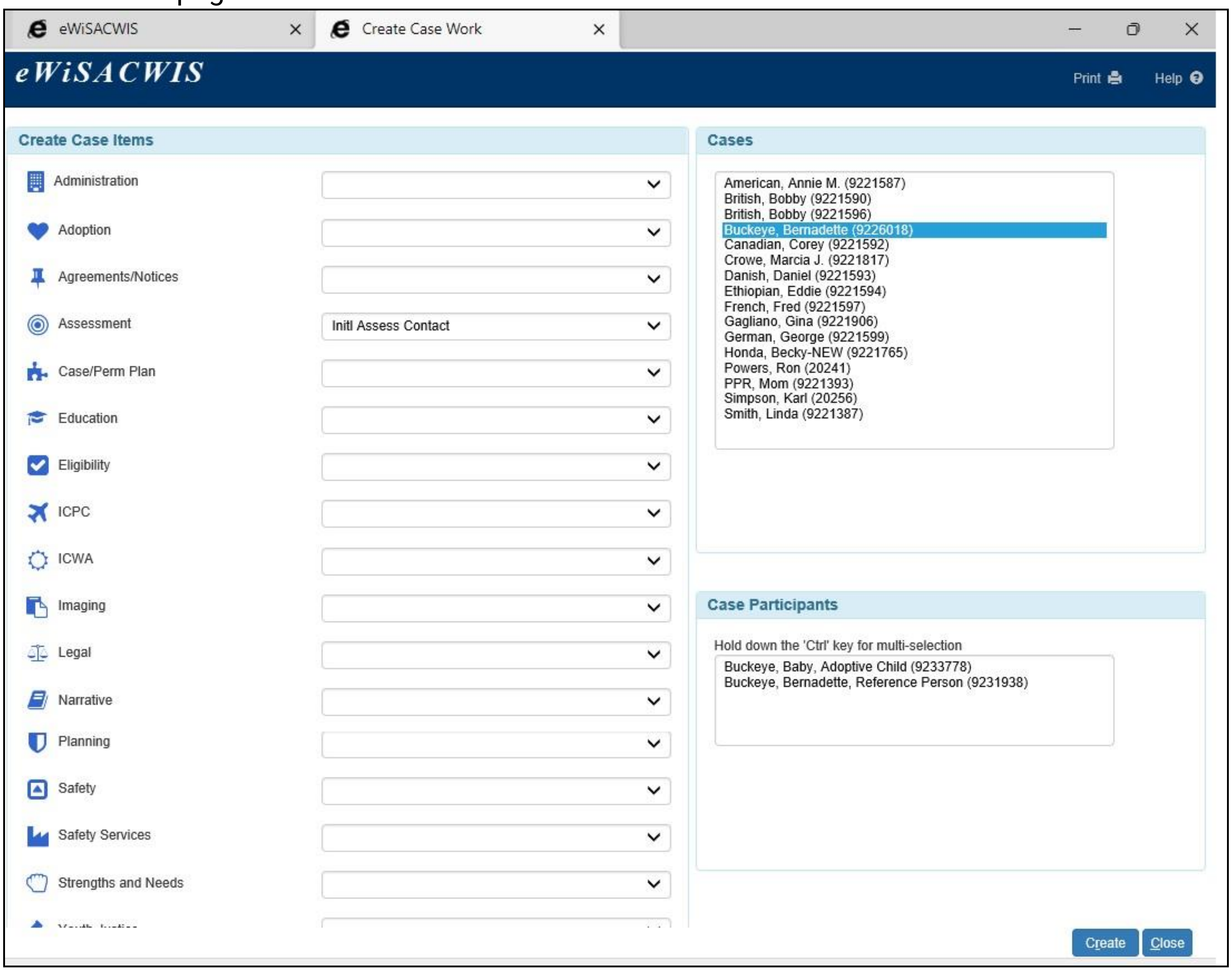
Initial Assessment Contacts

Note: In order to create a case note, an assignment to the case is not needed.

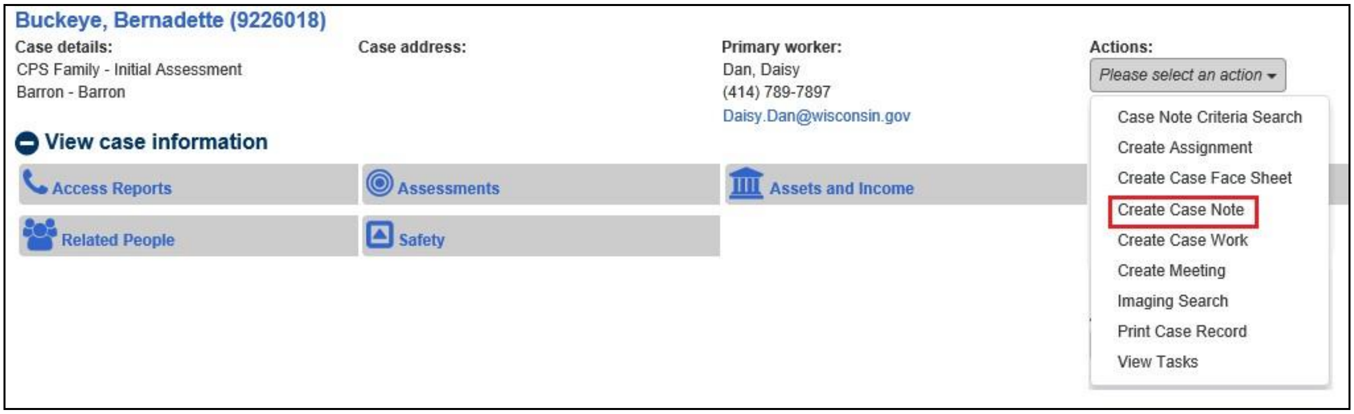
Creating Case Notes on Assigned Cases

1. Create an initial assessment contact case note using one of two methods:
   a) From the desktop, go to the Cases tab and click the Case Work hyperlink Create case work. This will open the Create Case Work page.

   On the Create Case Work page, select the Initl Assess Contact from the Assessment drop-down and select the Case. The selection of case participants is optional; use the 'ctrl' key to select more than one participant. If the contact is with someone who is not a participant with the case, do not select a name. Click Create. This will open the Case Notes page.



   b) Or from your desktop, select Create Case Note from the Actions drop down next to the specific case. This will open the Case Notes page.



2. On the Case Notes page, the top of the page pre-fills with the Case Name, Worker Creating Note, Worker Making Contact, and Date Entered. There is an option to Search out the Worker Making Contact if it is not the same as the person entering the case note. The note can be saved and updated for up to 30 days after it is created. When the Note Finalized checkbox is checked, 30 days have passed, or the Assessment is approved by a supervisor, the note will be frozen and not editable.

3. In the Note Information group box, the Date and Begin Time are required user entered fields. Case Notes created via Create Casework will automatically pre-fill the Category and Type with Initl Assess Contact and Face-to-Face, respectively. If creating the Case Note via Actions, select these values on the Category and Type drop-downs.

4. The Face-to-Face Location and Face-to-Face Result are drop down value fields. Select a value that best describes the Assessment Contact Type.

5. The Participants in the case, which includes case participants and collaterals, display on the right side. You can use 'Ctrl' key to multi-select additional participants.

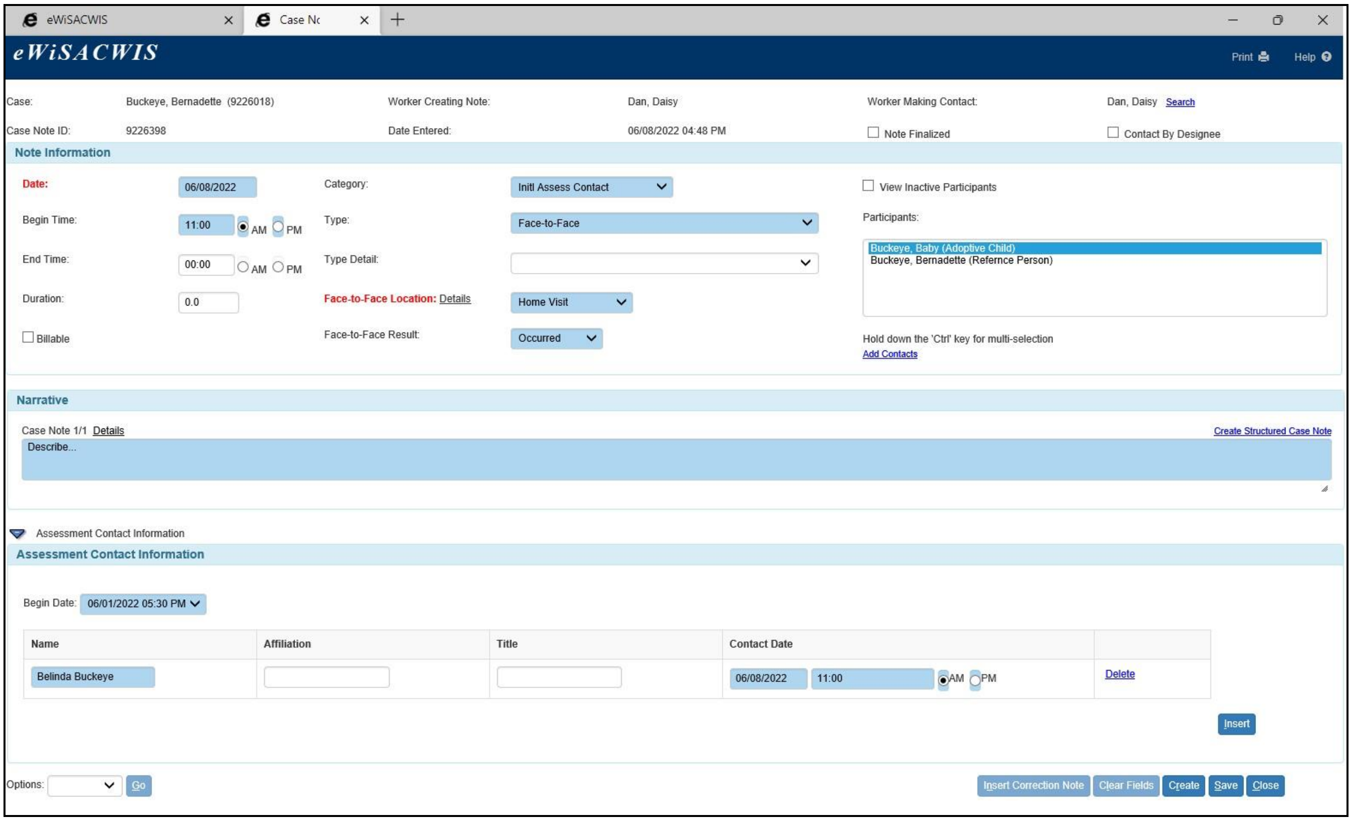
6. The Narrative group box is a user entered text box. Enter a narrative describing what happened during contact with the individual(s). For policy guidance, place your mouse over the 'Details.'

7. Below the Narrative group box is an expando for Assessment Contact Information.

   The Begin Date field is a drop down displaying the 'Date and Time Report was Received' for screened in access reports. Select the correct date on which the contact took place.

   The Name and Contact Date are user-entered mandatory fields. If a mistake is made, use the Delete hyperlink to remove the information entered.

   The Insert button will allow additional Assessment Contacts to be entered. Clicking the [Add Contacts] hyperlink below the participants will add the selected contact(s) to the Assessment Contact Information group box.



9. Finally, when completed, click on Save and Close. This information will be saved under the Assessment icon and will pre-fill the Initial Assessment with the contacts names and dates.

10. To create an Initial Assessment Contact Note from the Assessment, click on the pending Assessment from your desktop. This will open the Assessment page.

11. On the Assessment page, click on the Summary tab. In the Initial Face-to-Face Contact Information group box, click on the Create Initial Face-to-Face Contact Note hyperlink. This will open the Case Note page.

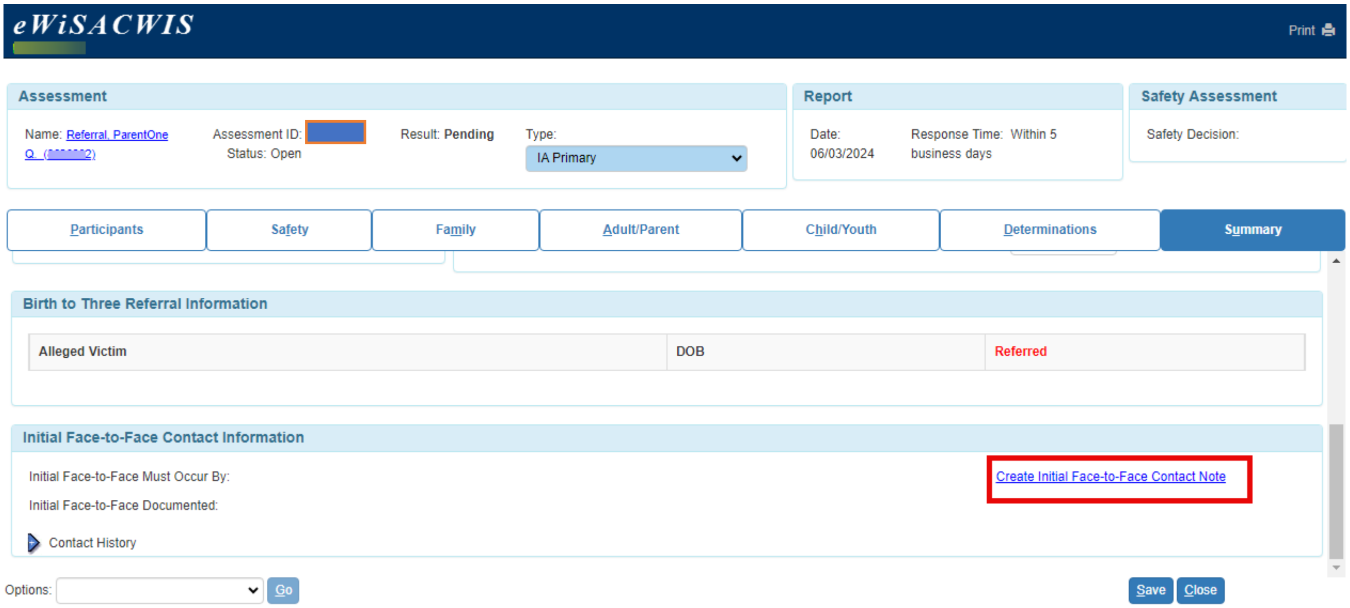
12. On the Case Note page, the Category and Type will pre-fill and disabled.

13. In the Note Information group box, enter the Date and Begin Time.

14. The Face-to-Face Location and Face-to-Face Result are drop-down value fields. Select a value that best describes the Assessment Contact Type.

15. The Participants in the case are shown on the right side. You can use 'Ctrl' key to multiselect additional participants.

16. The Narrative group box is a user-entered field. Enter a narrative describing what happened during contact with the individual(s). For case worker contact policy guidance, move your mouse over the 'Details' flair.



17. Contact information is entered in the Assessment Contact Information group box.

    The Begin Date field is a drop-down value displaying the ‘Date and Time Report was Received’ for screened in access reports. Click on the drop-down value field to view other dates. Select the correct date on which the contact took place.

    The Insert button will allow additional Assessment Contact Information to be entered. The ‘Add Contacts’ hyperlink below the participants will also add those contacts to the Assessment Contact Information group box.

    The Name and Contact Date are user-entered mandatory fields. If a mistake is made, use the Delete hyperlink to remove the information entered.

18. Finally, when required information has been entered, click on Save and Close. This information will be saved under the Assessment icon and will pre-fill the Initial Assessment with the contacts names and dates.