



Case Contact–Quick Entry – FSC Job Aid

The *Case Contact–Quick Entry* button can be found at the top of every screen and can be used to quickly start a Contact that has already occurred or is scheduled to occur.

Contacts



Dashboard

Search

Admin ▾

Case Contact-Quick Entry

Amber Davis ▾

Contacts - Quick entry

Case Id *

-Select-

Case Name *

-Select-

Primary Purpose of Contact *

None selected ▾

Contact Date *

Contact Notes

Save

Close

Navigation

1. The **Case Contact – Quick Entry** button can be found at the top of every screen.



Case Contact – Quick Entry pop-up

1. Click **Case Contact – Quick Entry** to open the pop-up.

The screenshot shows the 'Contacts - Quick entry' pop-up form. It contains the following fields and elements:

- Case Id *** and **Case Name *** drop-down menus, both currently showing '-Select-'. A red box labeled 'A' highlights these two fields.
- Primary Purpose of Contact *** dropdown menu showing 'None selected'. A red arrow labeled 'B' points to it.
- Contact Date *** text input field. A red arrow labeled 'C' points to it.
- Contact Notes** text area. A red arrow labeled 'D' points to it.
- Save** and **Close** buttons. A red bracket labeled 'E' highlights these buttons.
- A list of existing contacts below the buttons. A red box labeled 'F' highlights the first contact entry, which includes the date 'July 01, 2016 Friday **', the case name 'Case: November (October November)', and the purpose 'Contact Purpose: General Conversation - Well Being'.

- a. Start by selecting either the *Case ID* or the *Case Name*. When one drop-down is selected the other drop-down will automatically fill in. The Case Name drop-down includes the name of the Participant in parentheses after the name of the case for easy identification.
- b. *Purpose of Contact*: Select all of the purposes that apply to this contact.

Important Note: Selecting "Approved Home Visiting Model" will allow this contact to be tracked properly for **Home Visiting** reporting purposes.

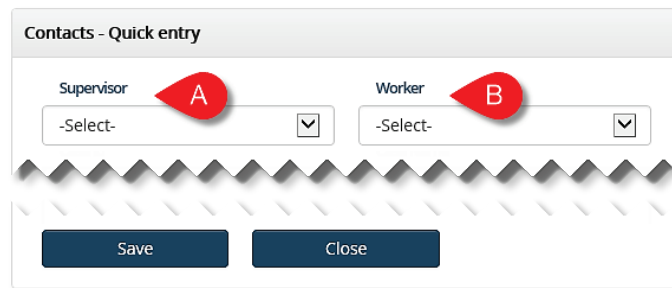
- c. Enter the *Contact Date*.
- d. *Contact Notes* can be entered but this field is not required in order to save the Quick Entry.



- e. Click **Save** to add to the Quick Contact grid. Clicking **Close** will close the Quick Entry pop-up. Any information that was not already saved will be lost.
- f. Contacts started in the *Case Contact-Quick Entry* pop-up will remain in the *Quick Entry* pop-up grid until the Contact is completed in **Tracking** > **Contacts**.
 - i. To delete a Contact from the *Quick Entry* grid, move the mouse cursor to the right of the contact; the Delete Icon [] will appear. Click on the  to delete the Quick Contact.

IMPORTANT NOTE: *There is no Delete Confirmation pop-up when deleting a Quick Entry contact.*

- 2. Supervisors and Managers: Supervisors and Managers will have two additional drop-downs at the top of the *Case Contact-Quick Entry* pop-up before a *Case ID* or *Case Name* can be selected:



- a. *Supervisor*: Select the Supervisor of the worker assigned to the case.
- b. *Worker*: Select the Worker assigned to the case.

TIP: *To view Cases directly assigned to a Supervisor, select the Supervisor's Name under Supervisor and "My Cases" under Worker.*

For more information...

For assistance, please contact the Allegheny County Service Desk at ServiceDesk@AlleghenyCounty.US or call 412-350-HELP (4357). Select Option 2 for the DHS Service Desk.

To access I-Service, go to: <https://servicedesk.alleghenycounty.us>

This and other Job Aids can be found at: <http://s3.amazonaws.com/dhs-application-support/index.htm>