



Case Contact - Quick Entry – HCM 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.

Case Contacts Screen



Dashboard

Search

Reports

Case Contact-Quick Entry

Amber Knight

Contact Contacts - Quick entry

Case Id *

-Select-

Case Name *

-Select-

Primary Purpose of Contact *

-Select-

Contact Date *

Contact Notes

Save

December 22, 2015 Tuesday

Case: November (October November)
Contact Purpose: Gathering Information


Close

Accessing the Case Contacts – Quick Entry

1. The **Case Contact-Quick Entry** can be found in the top-right corner of every screen in HCM.



Case Contact Quick Entry pop-up

1. Click **Case Contact-Quick Entry** to open the pop-up.
 - 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 Head of Household (HOH) in parentheses after the name of the case.
 - b. Select the *Primary Purpose of Contact*.
 - c. Enter the *Contact Date*.
 - d. *Contact Notes* can be entered here but are not required to save the Quick Entry.
- Click **Save** to add to the Quick Contact grid.
- e. Contacts started in the *Case Contact – Quick Entry* pop-up will remain in the pop-up grid until the Contact is completed in **Tracking** → **Contacts**.
 - i. To delete a Contact from the Quick Entry grid, click the delete icon [] to the right of the Contact's line in the grid.

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 the Self Service Tool go to <http://servicedesk.alleghenycounty.us>