



# Jail Collaborative– Provider- Adding Notes

A Provider can add notes for a Jail Client and send those notes to active collateral.

## Completing the Notes Screen

1. Bring Jail Client into focus.
2. Navigate to the *Notes* screen.
  - a. Jail **Collab.** > **Notes**.
  - b. The *Notes* page appears with the *Notes History* grid at the top of the page.
    - i. Click **[New]** to add a new note.
3. Complete the *General Information* section.
  - a. Select the *Date*.
  - b. Enter the time the note created in the *Time* field.
  - c. Select the *AM/PM*.
  - d. Enter the narrative text in the *Note* field.
4. Select *Notification Participants*.
  - a. Click **[Select]** beneath the *Collateral/Provider(s)* box.
    - i. The *Participant Selection* multi-select displays. This box displays all providers currently providing services to this client. It also displays all ACTIVE collateral for which a valid email address was provided.
    - ii. Highlight collateral/providers to whom the note will be sent, click **[>>]**, then click **[OK]**. The collateral/providers selected populate the *Collateral/Provider(s)* box.
5. Click **[Save]**. This sends the note.
  - a. The note created appears in the grid. A 'Y' displays in the *Notification Sent* section to show notification the note was sent by email.

*TIP: Once a note is saved, it is sent automatically and cannot be updated.*

## For more information...

For assistance, please contact the Allegheny County Service Desk at [servicedesk@alleghenycounty.us](mailto:servicedesk@alleghenycounty.us) or 412-350-4357 (Option 2 for DHS). To access the Self Service Tool go to <http://servicedesk.alleghenycounty.us>.

This Job Aid and additional user materials are located on the DHS Amazon site at <http://dhswbt.s3.amazonaws.com/KIDSJobAids/index.html>.