

Department of Human Services Allegheny County, Pennsylvania

## 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**

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- 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 <u>servicedesk@alleghenycounty.us</u> or 412-350-4357 (Option 2 for DHS). To access the Self Service Tool go to <u>http://servicedesk.alleghenycounty.us</u>.

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