

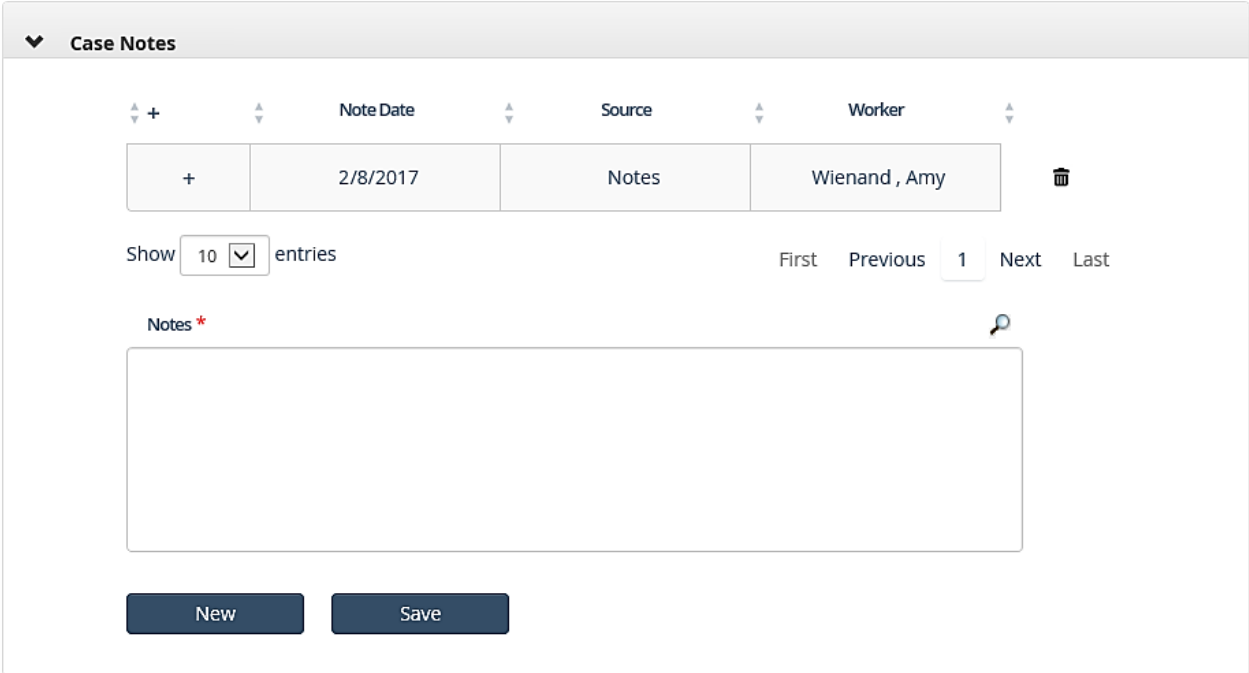


## Case – Case Notes

### MH Residential Job Aid

The *Case Notes* screen allows the user to document notes and contacts regarding the Consumer and the Referral. Notes documented by the worker in the Referral will carry over to this screen.

#### Case Notes



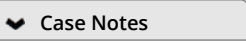
The screenshot shows the 'Case Notes' interface. At the top, there's a header 'Case Notes' with a dropdown arrow. Below it is a table with columns: '+', 'Note Date', 'Source', 'Worker', and a trash icon. The table contains one row with a '+' icon, the date '2/8/2017', the source 'Notes', and the worker 'Wienand, Amy'. Below the table, there's a 'Show' dropdown set to '10' and 'entries'. To the right of this are navigation links: 'First', 'Previous', '1' (highlighted), 'Next', and 'Last'. Below these is a large text area labeled 'Notes \*' with a magnifying glass icon. At the bottom, there are two buttons: 'New' and 'Save'.






#### Navigation

1. From the **Dashboard**: Locate the desired Case and click on the *Case ID* to bring the Case into focus.
  - a. Click on the **Case Information** tile. Then click on the **Case Notes** tile.



## Case Notes

1.  pane:

- a. To view the *Notes* from the grid without opening the Note, click on the [ + ] to the left of the Note in the grid. To close the *Notes* view, click on the [ - ] that now appears to the left of that Note in the grid.
    - i. To view the *Notes* for all of the Notes in the current page of the grid, click on the [ + ] above the grid. To collapse all of the *Notes*, click on the [ - ] that now appears above the grid.
  - b. Click  to start documenting a new Note.
  - c. *Notes*: Enter your notes in the Notes narrative text box.
  - d. Click  to add the note to the grid.
2. To delete a Note, click the Delete Icon [  ] to the right of the Note in the *Case Notes* grid.
- i. A *Confirm Delete* pop-up will appear: Clicking  will delete the Note. Clicking  will cancel the action and the Note will not be deleted.

## For more information...

For assistance, please contact the Allegheny County Service Desk at [ServiceDesk@AlleghenyCounty.US](mailto: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> or <http://dhsassist.dhs.allegheny.local> for internal users.