Add and Manage Hotline Details
Step Action Table

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Process

This step action table describes the actions needed to create a new Hotline. The step action table will also describe the actions needed to view, edit, and complete the Hotline details, which includes: Call Summary; Reporter Information; Family Information; Call Narrative; and Call Disposition.

Introduction

- The New Hotline pop-up window allows the worker to add a new Hotline with basic details. The worker will then be redirected to the Hotline details page to continue adding information about the Hotline, or the worker can revisit the details page at a later time to complete the Hotline.
- The Hotline Details Page provides access to view, edit and complete a Hotline using the different sections. The worker can jump directly to the different Hotline sections by using the left navigation pane.
- On the Hotline Details page, each section can be collapsed and then expanded once collapsed. All sections will be expanded by default.

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Add New Hotline

Add New Hotline

Step	Action
1	In the *Left Navigation* panel. • Click **Queues.** • Click **Pending Hotlines.**
2	On the *Pending Hotlines* page. • Click the **Add Hotline** button.
3	In the *New Hotline* pop-up window. • **Call Date** – This field will display the current date. • **Call Time** – This field will display the current time. • If required, click the **Reporter County** drop-down arrow. • Select the appropriate County option. • If required, click the **Responsible County** drop-down arrow. • Select the appropriate County option. **Note:** The Reporter County and Responsible County will default to the primary affiliated county of the worker adding the Hotline. The worker can update either of the county fields to another affiliated county. • Click in the **Call Taker*** field. • Begin typing the name of the call taker, a drop-down list of matching names will display, selecting a name from the list will populate the Call Taker field. • **Hotline Status** – This field will display Pending by default. • Click **Continue** to save the information and open the *Hotline Details* page or **Cancel** to close without saving..
4	On the *Hotline Details* page. • The new Hotline has been created, with the name of the worker creating the hotline displayed in the *Primary Worker* field. • To return to the *Pending Hotlines* page, click **Back to Workspace**.

Call Summary

- Report Date/Time cannot be edited once saved to the hotline record and can only be entered by worker if Method is not 'Hotline Call'.
- The **Call Reason** options change based on Call Type selection. If no Call Type has been selected, all Call Reason options will be available except for the ones specific to the 'Information & Referral' call type.
- The primary worker and secondary worker fields in the call summary panel are read-only fields. Use the transfer/assign pop-up to assign or edit the worker.

Call Summary

Step	Action
1	In the *Left Navigation* panel. • Click **Queues.** • Click **Pending Hotlines.**
2	On the *Pending Hotlines* page. • Select a hotline by clicking the **Hotline ID**.

3	On the *Hotline Details* page, *Call Summary* section. • The worker will be able to listen to a recording of the call if the Method is 'Hotline Call'. • Click in the **Report Date*** field. • Type the date with a MM/DD/YYYY format or enter the date using the calendar option. • Click in the **Report Time*** field. • Use the spinners to edit the time. • Click the **Call Taker County*** drop-down arrow. • Select the appropriate option from the list. • Click the **Call Type *** drop-down arrow. • Select the appropriate option from the list. • Click the **Call Reasons *** drop-down arrow. • Select the appropriate option(s) from the list. This is a multi-select field, choose all that apply. **Note**: When the **Call Reason** contains either 'Substance Abuse (Child)', 'Substance Abuse – Parent', and/or 'Drug Exposed Child', then then Substance Abuse field will be enabled and required. • Click the **Substance Abuse *** drop-down arrow. • Select the appropriate option(s) from the list. This is a multi-select field, choose all that apply. • If the option of 'Other' is selected for Substance Abuse, then the Describe Other field will be enabled and required. **Note:**
4	Click **Save** at the top or bottom of the page to save your information and continue.
5	Use the links in the left navigation panel or the scroll bar to continue to the **Reporter Information** section.

Reporter Information

- Reporter Name is Mandatory unless Unknown or Anonymous is selected.
- Method cannot be edited once Hotline is submitted, and can only be entered by worker if Method is not 'Hotline Call'.
- The Agency Name field will autocomplete from pre-defined lookup information when Reporter Type is Mandatory Reporter.

Reporter Information

Step	Action
1	On the *Reporter Information* section. • Click In the **Reporter First Name** text box. • Enter the appropriate information. • Click In the **Reporter Last Name** text box. • Enter the appropriate information. **Note:** If the reporter is unknown or wishes to remain anonymous, click in the radio buttons. • Click the **Reporter Phone Number*** drop-down arrow. • Select the appropriate option from the list. • Type the phone number into the phone number field. • Select the **Primary** radio button if this is the primary phone number. • Click on **Add Another Number** to open a new phone number row. • To delete a phone number, use the **Trashcan** icon at the right of the number. • Click In the **Reporter Email** text box. • Enter the appropriate information. • Click the **Method*** drop-down arrow. • Select the appropriate option from the list. • Click the **Reporter Type*** drop-down arrow. • Select the appropriate option from the list. • Click the **Reporter Relationship*** drop-down arrow. • Select the appropriate option from the list. • Click In the **Describe Relationship** text box. • Enter the appropriate information. • Click the **Agency Name**, **Agency Address**, and **Agency Phone** text boxes, if this information is required. • Type the required information.

2	Click **Save** at the top or bottom of the page to save your information and continue.
3	Use the links in the left navigation panel or the scroll bar to continue to the **Family Information** section.

Family Information

- Household Address is required and will be able to handle a partial address.

Family Information

Step	Action

1	On the *Family Information* section.
	• Click In the **Family Name** text box.
	• Enter the appropriate information.
	• To edit the address, select **Edit Address.**
	• In the **Edit Address** pop-up window.
	• Edit fields as needed.
	• Click **Save** to save the changes or **Cancel** to close without saving.
	• If desired, select the map icon to the right of the address to view the address on an online map in a new browser tab.
	• Click the **Yes** or **No** toggle for **Incident Address Same As Household Address.**
	    o If **Yes,** the Incident Address/County will copy the Household Address/County.
	    o If **No,** select **Edit Address** to open the **Edit Address** pop-up window.
	    o Edit fields as needed.
	• Click in the **Directions** text box to add directions, if provided.
	• Click the **Household Phone Numbers*** drop-down arrow.
	• Select the appropriate option from the list.
	• Type the phone number into the phone number field.
	• Select the **Primary** radio button if this is the primary phone number.
	• Click on **Add Another Number** to open a new phone number row.
	• To delete a phone number, use the **Trashcan** icon at the right of the number.
	Note: Multiple phone numbers can be added for the Household.

2	Click **Save** at the top or bottom of the page to save your information and continue.
3	Use the links in the left navigation panel or the scroll bar to continue to the **Call Narrative** section.

Call Narrative

Call Narrative

Step	Action
1	On the *Call Narrative* section. • Click the **Call Type*** drop-down arrow. • Select the appropriate option from the list. • Click the **Call Reasons*** drop-down arrow. • Select the appropriate option(s) from the list. This is a multi-select field, choose all that apply. • Click **Edit** button. This will open the call **Narrative** pop-up window. • Navigate through the Narrative window and select screen guide categories from the left navigation panel. • Review each of the associated screen guides. • Click the **Add to Narrative** button. • Enter text that supports the background narrative in the small window. • Click **Remove** to remove the text, if information is entered in error. • When all entries are made, click **Save** • The background narrative text that was entered is now saved to the hotlines record. • Click **Cancel** to close without saving.
2	Click **Save** at the top or bottom of the page to save your information and continue.
3	Use the links in the left navigation panel or the scroll bar to continue to the **Call Disposition** section.

Call Disposition

- For hotlines with a PA4-Youth in Conflict, PA5-Child Protection, or Institutional Abuse/Neglect call type, “Create a New Referral” will be the only option.
- For hotlines with the Information and Referral call type, “Do not Create a Referral” will be the only option.

Call Disposition

Step	Action

1	On the *Call Disposition* section.
	• Select the appropriate radio button for **Call Disposition.**
	• If the **Do not create a referral** or the **Create a referral** radio button is selected, click the **Submit Hotline** button.
	• If the **Connect to existing referral/assessment** is selected
	  ○ Click the **Enter ID** text box and type the referral.
	  ○ Click the **Send To:** drop-down arrow.
	  ○ Select the appropriate option.
	• Click In the **Comments** text box.
	• Enter appropriate comments.
	• Click the **Request Approval** button.