



TM DYS – CM - Manage Document Tracking Job Aid

Users

- DYS Client Manager or DYS Client Manager Supervisor

Process

These Job Aid tables describe the actions needed to manage the tracking of documents for a Youth from the Client Manager page.

Related Job Aids

- *TM DYS_CM – Access/View Client Manager*

Introduction

- If Document Type is 'Standard', a Type will be required and Description will be optional.
- If Document Type is 'Other', the Type will be disabled and Description will be required.
- Creation Date/Time will default to the current Date/Time and will be read-only.

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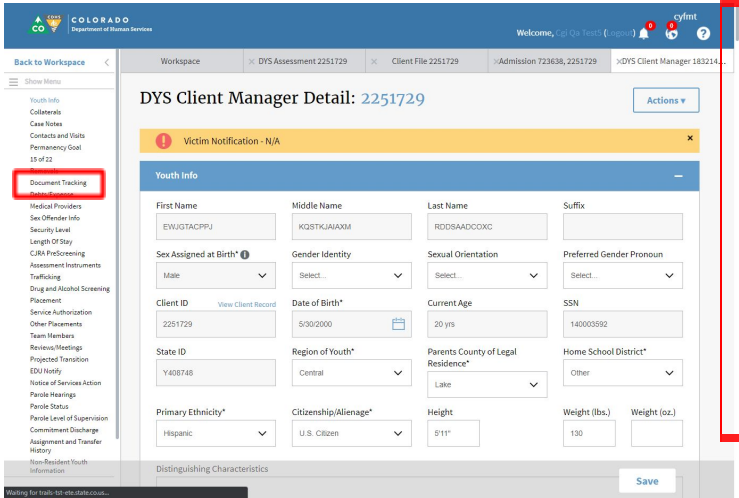
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Access and View Document Tracking

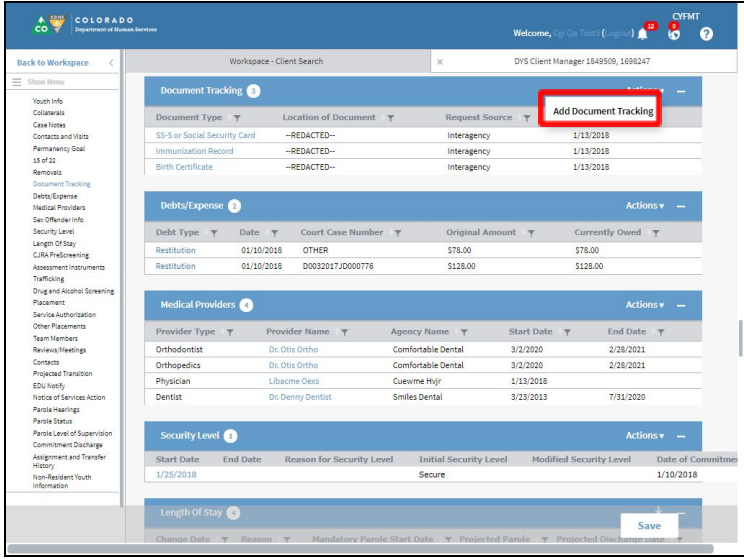
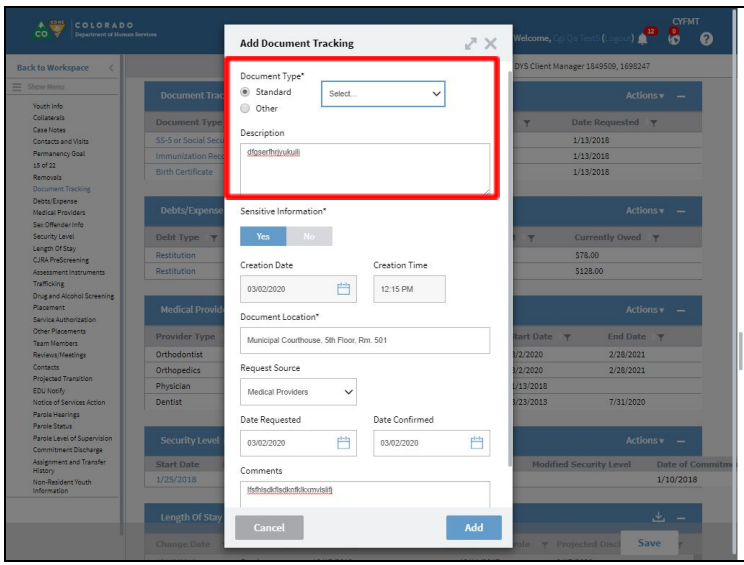
- The default is sorted by Date Requested with the most recent on top.

Steps/Output	Screenshot
<p>Refer to the <i>TM DYS Client Manager – Access and View Client Manager Detail Job Aid</i> for details on locating the desired Client Manager Details.</p> <p>Navigate to the <i>Document Tracking</i> section by clicking the link in the left navigation panel or using the scroll bar at the right of the page.</p>	



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Add Document Tracking

Steps/Output	Screenshot
<p>In the <i>Document Tracking</i> section:</p> <ol style="list-style-type: none"> 1. Click Actions. 2. Select Add Document Tracking. <p>The <i>Add Document Tracking</i> pop-up window displays.</p>	
<p>In the <i>Add Document Tracking</i> pop-up window:</p> <ol style="list-style-type: none"> 3. Click the Document Type* radio button. 4. Click the drop-down arrow and select the Document Type*. 5. Click the Description field and enter a description. 	



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- Click the **Yes/No** toggle to identify if this is **Sensitive Information***

The screenshot shows the 'Add Document Tracking' form in a web application. The form includes fields for Document Type (Standard/Other), Description, Sensitive Information* (Yes/No toggle), Creation Date, Creation Time, Document Location, Request Source, Date Requested, Date Confirmed, and Comments. The 'Sensitive Information*' toggle is highlighted with a red box, indicating it should be set to 'Yes'.

- Enter the **Document Location***.
- Use the drop-down arrows, calendar function, and text field to complete the remaining fields.

The screenshot shows the 'Add Document Tracking' form with the 'Document Location*' field highlighted in red. The field contains the text 'Municipal Courthouse, 5th Floor, Rm. 501'. Other fields are filled with the same data as in the previous screenshot.



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9. Click **Add** to save the Document Tracking information or **Cancel** to close without saving.

Add Document Tracking

Description:

Sensitive Information*
 Yes No

Creation Date: 03/02/2020 Creation Time: 12:15 PM

Document Location*:

Request Source:

Date Requested: 03/02/2020 Date Confirmed: 03/02/2020

Comments:

Cancel **Add**

This saves the update and returns you to the *DYS Client Manager Detail Screen*.

Document Tracking

Document Type	Location of Document	Request Source	Date Requested
Other	Municipal Courthouse, 5th Floor, Rm. 501	Medical Providers	3/2/2020
Immunization Record	--REDACTED--	Interagency	1/13/2018
SS-5 or Social Security Card	--REDACTED--	Interagency	1/13/2018
Birth Certificate	--REDACTED--	Interagency	1/13/2018

Debits/Expense

Debt Type	Date	Court Case Number	Original Amount	Currently Owed
Restitution	01/10/2018	OTHER	\$78.00	\$78.00
Restitution	01/10/2018	D0032017J0000776	\$128.00	\$128.00

Medical Providers

Provider Type	Provider Name	Agency Name	Start Date	End Date
Orthodontist	Dr. Otis Ortho	Comfortable Dental	3/2/2020	2/28/2021
Orthopedics	Dr. Otis Ortho	Comfortable Dental	3/2/2020	2/28/2021
Physician	Libacme Olex	Cuewme Hyr	1/13/2018	
Dentist	Dr. Denry Dentist	Smiles Dental	3/23/2013	7/31/2020

Security Level

Start Date	End Date	Reason for Security Level	Initial Security Level	Modified Security Level	Date of Commitment
1/25/2018			Secure		1/10/2018

Length of Stay

Save



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Edit Document Tracking

Steps/Output	Screenshot
<p>1. Click the desired document name link in the Document Type column.</p> <p>This opens the <i>Edit Document Tracking</i> pop-up window.</p>	
<p>In the <i>Edit Document Tracking</i> pop-up window:</p> <p>2. Make changes as needed to any editable field.</p>	



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- Click **Save** to save the changes or **Cancel** to close without saving.

Edit Document Tracking

Description:

Sensitive Information*
 Yes No

Creation Date: Creation Time:

Document Location*:

Request Source:

Date Requested: Date Confirmed:

Comments:

This saves the update and returns you to the *DYS Client Manager Detail Screen*.

Workspace - Client Search | DYS Client Manager 1849509, 1698247

Document Type	Location of Document	Request Source	Date Requested
Discharge Summary	Municipal Courthouse, 5th Floor, Rm. 501	Medical Providers	3/2/2020
Immunization Record	--REDACTED--	Interagency	1/13/2018
SS-5 or Social Security Card	--REDACTED--	Interagency	1/13/2018
Birth Certificate	--REDACTED--	Interagency	1/13/2018

Debt Type	Date	Court Case Number	Original Amount	Currently Owed
Restitution	01/10/2018	OTHER	\$78.00	\$78.00
Restitution	01/10/2018	D0032017J0000776	\$128.00	\$128.00

Provider Type	Provider Name	Agency Name	Start Date	End Date
Orthodontist	Dr. Otis Ortho	Comfortable Dental	3/2/2020	2/28/2021
Orthopedics	Dr. Otis Ortho	Comfortable Dental	3/2/2020	2/28/2021
Physician	Libacme Olexa	Cuewme Hjr.	1/13/2018	
Dentist	Dr. Denny Dentist	Smiles Dental	3/23/2013	7/31/2020

Start Date	End Date	Reason for Security Level	Initial Security Level	Modified Security Level	Date of Commitment
1/25/2018			Secure		1/10/2018