



TM DYS – Manage Case Notes from Facility Operations Detail Page for a Youth Job Aid

Users

Manage the Case Notes for the Youth (Add, Edit)

- **DYS Facility Operations Detail** – DYS Facility Ops Worker, DYS Facility Ops Supervisor, DYS Admission Worker, DYS Admission Supervisor, or DYS Director/Assist Director

Access and View the Youth Info (Read-only)

- **DYS Facility Operations Detail** – DYS Client Manager, DYS Client Manager Supervisor, or DYS Victim Services Supervisor

Process

These Job Aid tables describe the actions needed to manage the Case Notes for a Youth from the Facility Operations Detail page.

Introduction

- There will be a list of Case Notes for the Detail screen. The default sort will be by Created Date/Time with newest on top.
 - For the *DYS Facility Operations Detail* page – the Case Notes specific to the underlying DYS Case and detail screen display.
- A tally (badge count) of the total number of Case Notes is displayed.

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Access and View Case Notes

- The worker with an appropriate profile will be able to view a *Case Note* (read-only) if:
 - The *Case Note* is associated to an inactive DYS case, or
 - The *Case Note* is associated to an active case where the *Addendum* field has been populated if it is accessible from the Case Notes list on the Detail page.

Navigate to the Facility Operations Detail Page

Steps/Output	Screenshot
<p>Navigate to the Facility Operations Page:</p> <ol style="list-style-type: none"> 1. Execute a Client Search from the Left Hand Menu 2. Select the Client 3. Click Admissions Tab 	<p>The screenshot displays the CDHS Facility Operations Detail Page for Client ID 2002046. The page includes a search form with fields for Address (123 Elm St), City (Denver), ZIP (80132), State ID (A55555), Household Number (80000000), and Social Security Number (000-00-0000 or 0000). Below the form is a table with one result for Client ID 2002046, Male, DOB 1/24/2003, Age 18, State ID Jefferson, and County Yes. The 'Admissions' tab is highlighted in red.</p>



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- Once in the Admissions page, click the Actions dropdown
- Select DYS Facility Operations Detail

The screenshot shows the CDHS Admissions page for a youth case. The page title is "Admissions for Jr: 2002046". The page includes a navigation menu on the left with options like "Youth Info", "Admission Summary", "Parent/Guardian Notification", "Reason Detained", "Arrest", "Offenses", "Court Hearings", "Detention Sentence", "Room Assignment", "Classification", "Room Assignment", "Detention Victim Notification", "Other Placements", "Parole Status", "Approval Request", "Supervisor Approval", "Temporary Release", and "Release". The main content area displays the Case ID (1857675) and Admission ID (757642). There are three yellow notification banners for "Victim Notification - N/A". The "Youth Info" section contains a form with fields for First Name, Middle Name, Last Name, Suffix, Sex Assigned at Birth (Male), Gender Identity (Select...), Sexual Orientation (Select...), Gender Pronoun (Select...), Client ID (2002046), Date of Birth (1/24/2003), Current Age (18 yrs), SSN, State ID, Region of Youth* (Central), Parents County of Legal Residence* (Jefferson), Home School District* (Denver County 1), Primary Ethnicity* (Black or African Ame), Citizenship/Alienage* (U.S. Citizen), Height (5'3"), and Weight (170 lbs.). A "Save" button is located at the bottom right of the form. An "Actions" dropdown menu is visible in the top right corner, with "DYS Facility Operations Detail" highlighted.



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Navigate to Case Notes within Facility Operations Detail Page

- The worker with an appropriate profile will be able to add a Case Note:
 - From a *DYS Client Manager Detail* or a *DYS Facility Operations Detail* page, if the underlying DYS Case is active.
- If All DYS Cases are inactive and it is within 60 days of the Case Closure for the most recent DYS case, the worker will have the option to add a Case Note to the most recent DYS Case.
- The *Addendum* text area field will be disabled when adding the Case Note.

Steps/Output	Screenshot
<p>In the Facility Operations Detail Page, navigate to the <i>Case Notes</i> section:</p> <ol style="list-style-type: none"> 1. Either use the grey sidebar to scroll or click the Case Notes selection in the Left Hand Menu. 	

Add a Case Note

- The worker with an appropriate profile will be able to add a Case Note:
 - From a *DYS Client Manager Detail* or a *DYS Facility Operations Detail* page, if the underlying DYS Case is active.
 - From the *Client File Detail (SB94)* or the *DYS Assessment Detail* page, if there is at least one active DYS Case.
- If All DYS Cases are inactive and it is within 60 days of the Case Closure for the most recent DYS case, the worker will have the option to add a Case Note to the most recent DYS Case.
- The *Addendum* text area field will be disabled when adding the Case Note.



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Steps/Output	Screenshot
<p>In the <i>Case Notes</i> section:</p> <ol style="list-style-type: none"> Click the Actions drop-down arrow in the <i>Case Notes</i> section header. Select Add Case Note from the drop-down list. <p>This opens the <i>Add Case Note</i> pop-up window.</p>	
<p>In the <i>Add Case Note</i> pop-up window:</p> <ol style="list-style-type: none"> Complete the required fields and enter as much information as is available. <p>Note:</p> <ul style="list-style-type: none"> <i>Created By</i> defaults to the logged in worker and can be changed to another worker with the appropriate profile using autocomplete. <i>Created Date</i> and <i>Created Time</i> default to the current date and time and can be changed. 	



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If the Type is set to *Roster Information* and prior Case Notes exist on any of the cases for the Youth:

- The *Copy from most recent Roster Information Note* check box field displays.
- If checked, the *Comments/Summary* from the most recent Case Note record with a Type of Roster Information will be copied to the new Case Note.

When all information is complete:

5. Click **Add** to save the Case Note or **Cancel** to close without adding.

Note: Once a *Case Note* has been saved, only the *Addendum* field is editable.



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You return to the *Case Notes* section with the Case Note added.

Workspace

Case Notes 149 Actions ▾

2/4/2020 4:37:00 PM	Cgi Qa Test5	Roster Information
2/4/2020 3:38:00 PM	Cgi Qa Test5	Roster Information
1/17/2020 12:00:00 AM		Intake Note
11/21/2019 12:00:00 AM		Team Meeting Notes
11/15/2019 12:00:00 AM		Team Meeting Notes
11/7/2019 12:00:00 AM		Team Meeting Notes
10/31/2019 12:00:00 AM		Team Meeting Notes
10/24/2019 12:00:00 AM		Team Meeting Notes
10/17/2019 12:00:00 AM		Team Meeting Notes
10/10/2019 12:00:00 AM		Team Meeting Notes
10/3/2019 12:00:00 AM		Team Meeting Notes
9/26/2019 12:00:00 AM		Team Meeting Notes
9/20/2019 12:00:00 AM		Team Meeting Notes
9/13/2019 12:00:00 AM		Team Meeting Notes
9/12/2019 12:00:00 AM		One on One

Contacts and Visits 288 Actions ▾

Date/Time Occurred	Completed By	Method	Purpose	Status	Visitation Type	Participants
1/21/2020 4:58 PM			Case Plan Update, Case Consultation... More	Completed/Held		Jjgtagdtt Mdsaaahvbdq, Ingtahey... More
1/21/2020 3:51 PM			Family Involvement and Relationships	Completed/Held		Save



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Edit a Case Note

- Workers will be able to edit an existing Case Note if:
 - They have a profile that allows editing the specific Detail screen,
 - The associated *DYS Case* is active, and
 - The *Addendum* field has not been populated.
 - Otherwise, the *Case Note* will be read-only.

Steps/Output

In the *Case Notes* section:

- Click the date/time link in the **Created Date/Time** column.

This opens the *Edit Case Note* pop-up window.

Screenshot

The screenshot displays the CDHS Case Notes interface. At the top, there is a header with the Colorado Department of Human Services logo and the text 'Welcome, Cgi Qa Tests (Logout)'. Below the header, there is a 'Workspace - Client Search' section with a search bar and a 'DYS Assessment 2401645' label. The main content area is divided into two sections: 'Credible Report List' and 'Case Notes'. The 'Credible Report List' section is currently empty, showing 'No information available'. The 'Case Notes' section contains a table with the following columns: 'Created By', 'Type', and 'Created Date/Time'. The first row in the table is highlighted with a red box, showing the date and time '2/10/2020 2:14:00 PM'. The table also includes a 'Save' button at the bottom right.

Created By	Type	Created Date/Time
Cgi Qa Tests	Caseload Supervision	2/10/2020 2:14:00 PM
Chad Pedigo	Caseload Supervision	8/18/2018 11:00:00 AM
Nichole Schreiner	ITP/DCP/MDT Review	7/3/2018 12:00:00 AM
Nichole Schreiner	ITP/DCP/MDT Review	6/18/2018 12:00:00 AM
Nichole Schreiner	ITP/DCP/MDT Review	6/11/2018 12:00:00 AM
Chad Pedigo	Caseload Supervision	5/25/2018 12:00:00 AM
Nichole Schreiner	ITP/DCP/MDT Review	5/2/2018 12:00:00 AM
Gary Mills	Summary Prog Rpt Restorative Justice	5/1/2018 12:00:00 AM
Gary Mills	Summary Prog Rpt Restorative Justice	5/1/2018 12:00:00 AM
Rodney Tyma	Summary Prog Rpt Restorative Justice	4/29/2018 12:00:00 AM
Rodney Tyma	Summary Prog Rpt Public Safety	4/29/2018 12:00:00 AM
Rodney Tyma	Summary Prog Rpt Restorative Justice	4/5/2018 12:00:00 AM
Nichole Schreiner	ITP/DCP/MDT Review	4/4/2018 12:00:00 AM
Rodney Tyma	Summary Prog Rpt Restorative Justice	3/22/2018 12:00:00 AM
Nichole Schreiner	ITP/DCP/MDT Review	3/7/2018 12:00:00 AM



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In the *Edit Case Note* pop-up window:

2. Update the **Addendum** field as needed.

Note: The *Addendum* field is a rich text field allowing up to 4000 characters.

The screenshot shows the 'Edit Case Note' pop-up window. The 'Addendum' field is highlighted with a red box. The window contains the following fields: 'Created By*' (Cgi Qa Test5), 'Created Date*' (2/10/2020), 'Created Time*' (2:14 PM), 'Duration' (00:00), 'Type' (Caseload Supervision), 'Comments/Summary*' (Comments/Summary are required.), 'Addendum' (highlighted), 'Updated By' (Cgi Qa Test5), and 'Updated Date/Time' (2/10/2020 2:22:32 PM). There are 'Cancel' and 'Save' buttons at the bottom.

3. When the Addendum is complete, click **Save** to save the Case Note or **Cancel** to close without saving.

Note: Once a Case Note is saved with the *Addendum* populated, all fields in the Case Note become read-only.

The screenshot shows the 'Edit Case Note' pop-up window. The 'Save' button is highlighted with a red box. The window contains the following fields: 'Created By*' (Cgi Qa Test5), 'Created Date*' (2/10/2020), 'Created Time*' (2:14 PM), 'Duration' (00:00), 'Type' (Caseload Supervision), 'Comments/Summary*' (Comments/Summary are required.), 'Addendum' (Add Addendum information.), 'Updated By' (Cgi Qa Test5), and 'Updated Date/Time' (2/10/2020 2:22:32 PM). There are 'Cancel' and 'Save' buttons at the bottom.



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This saves the *Case Note* and returns you to the *Case Notes* section.

The screenshot displays the CDHS Case Notes interface. At the top, there is a header with the Colorado Department of Human Services logo and user information: 'Welcome, Cg Qa Test5 (Logout)'. Below the header, there is a 'Workspace - Client Search' section with a search bar and a 'DYS Assessment 2401645' label. The main content area is divided into two sections: 'Credible Report List' and 'Case Notes'. The 'Credible Report List' section shows a table with columns for 'Reported By', 'Status', 'Reported Date', 'Date Of Episode', 'Start Date', 'End Date', and 'Comments'. Below this, the 'Case Notes' section shows a table with columns for 'Date/Time', 'Reported By', and 'Case Note'. The first row in the Case Notes table is highlighted with a red box.

Reported By	Status	Reported Date	Date Of Episode	Start Date	End Date	Comments
No information available						

Date/Time	Reported By	Case Note
2/10/2020 2:14:00 PM	Cg Qa Test5	Caseload Supervision
8/16/2018 12:00:00 AM	Chad Pedigo	Caseload Supervision
7/3/2018 12:00:00 AM	Nichole Schreiner	ITP/DCP/MDT Review
6/18/2018 12:00:00 AM	Nichole Schreiner	ITP/DCP/MDT Review
6/11/2018 12:00:00 AM	Nichole Schreiner	ITP/DCP/MDT Review
5/25/2018 12:00:00 AM	Chad Pedigo	Caseload Supervision
5/2/2018 12:00:00 AM	Nichole Schreiner	ITP/DCP/MDT Review
5/1/2018 12:00:00 AM	Gary Mills	Summary Prog Rpt Restorative Justice
5/1/2018 12:00:00 AM	Gary Mills	Summary Prog Rpt Restorative Justice
4/29/2018 12:00:00 AM	Rodney Tyma	Summary Prog Rpt Restorative Justice
4/29/2018 12:00:00 AM	Rodney Tyma	Summary Prog Rpt Public Safety
4/5/2018 12:00:00 AM	Rodney Tyma	Summary Prog Rpt Restorative Justice
4/4/2018 12:00:00 AM	Nichole Schreiner	ITP/DCP/MDT Review
3/22/2018 12:00:00 AM	Rodney Tyma	Summary Prog Rpt Restorative Justice
3/7/2018 12:00:00 AM	Nichole Schreiner	ITP/DCP/MDT Review