

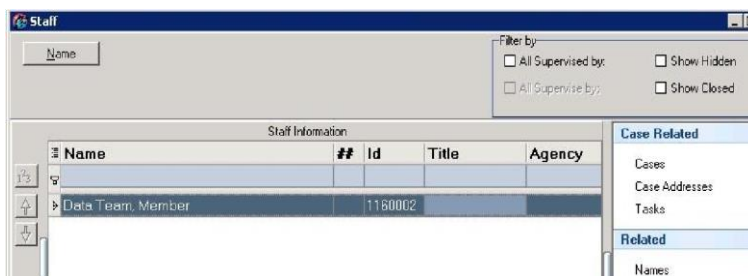
Entering Case Audits within the Tasks Section

Quick Steps

- From the Staff window, select the staff member and click Cases off to the right
- Highlight the case you are completing the case audit on and click the Tasks link off to the right-hand side
- Click the Add button
 - Case – The Case Id should automatically be filled in with the case Id you were highlighted on
 - Provider – Select the Provider Id with the magnifying glass (i.e. IMH, PIP, PIP Foster)
 - Section – Select (AUD) Case Audit by clicking on the magnifying glass
 - Staff – Select yourself from the list of staff members
 - Status – Select Done to indicate that the case was completed
 - Task Date – Enter the date the audit was started
 - Close Date – Enter the date the audit was completed
 - Click Save
- To Update a Task, Select the Task and Click the Update button
 - Update information as needed
 - Click Save
- Click Close to Exit this Screen

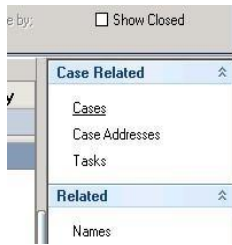
Detailed Steps:

1. After logging into the database, the Staff window appears and the system identifies your name on the staff list.



Entering Case Audits within the Tasks Section

- Click on the **Cases** link (on the side menu bar) to get to your open case list.

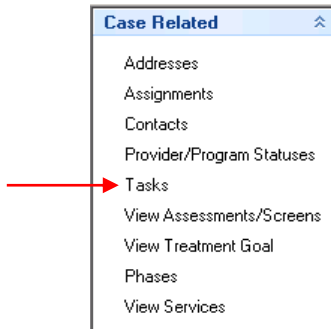


- From the Cases screen, click on the case you are wanting to complete an audit on.

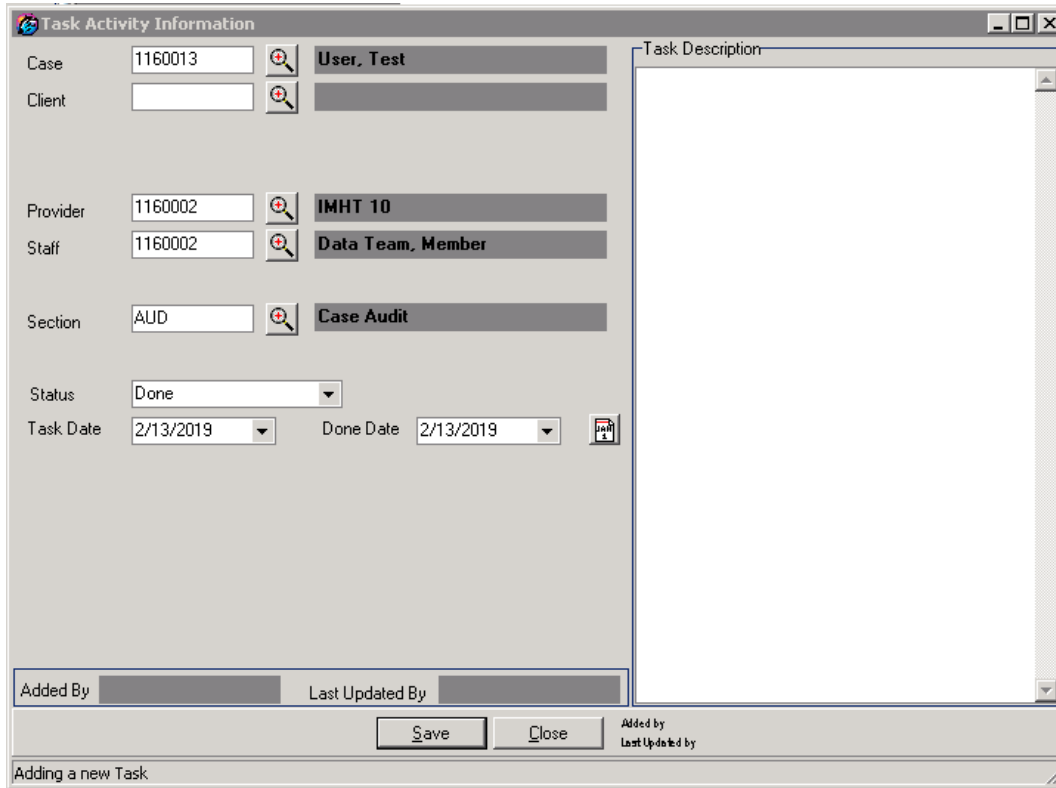
A screenshot of the 'Cases' screen. It features a search bar and a 'Case List' tab. Below the search bar is a table with the following columns: Case Name, FACTS Case ID, Case Id, Provider Name, Staff Name, Open Dt, and Close Dt. The table contains three rows of data.

Case Name	FACTS Case ID	Case Id	Provider Name	Staff Name	Open Dt	Close Dt
User, Test		1160013	PIP - Infant	Data Team	5/24/2018	
Test-Case, Brother		1160010	IMHT 10	Data Team	11/29/2017	
Test-Case, Baby		1160009	IMHT 10	Data Team	11/29/2017	

- Click Tasks on the right menu bar.

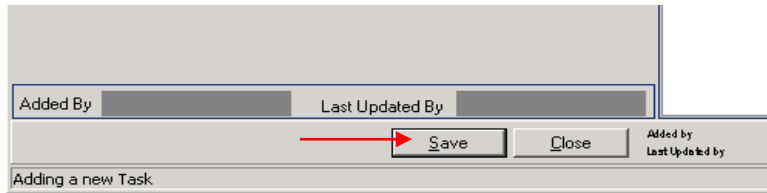


- To **Add** a task and begin the case audit, Click the **Add** button. The **Task Activity Information** screen will appear.



- Case – The Case Id should automatically be filled in with the case Id you were highlighted on
- Provider – Select the Provider Id with the magnifying glass (i.e. IMH, PIP, PIP Foster)
- Staff – Select yourself from the list of staff members
- Section – Select (AUD) Case Audit by clicking on the magnifying glass
- Status – Select Done to indicate that the case was completed
- Task Date – Enter the date the audit was started
- Close Date – Enter the date the audit was completed .

6. Click Save when finished.



The screenshot shows a web form for adding a new task. It includes two input fields labeled 'Added By' and 'Last Updated By'. Below these fields are two buttons: 'Save' and 'Close'. A red arrow points to the 'Save' button. To the right of the buttons, there is a label 'Added by' and 'Last Updated by'. At the bottom of the form, the text 'Adding a new Task' is visible.

- To **Update** a task, select the task from the **Tasks** screen. Click on the **Update** button. Update the task information as needed. Click **Save**.

If you need further assistance please contact the ECSC Database Services Team:

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