



Project DELTA

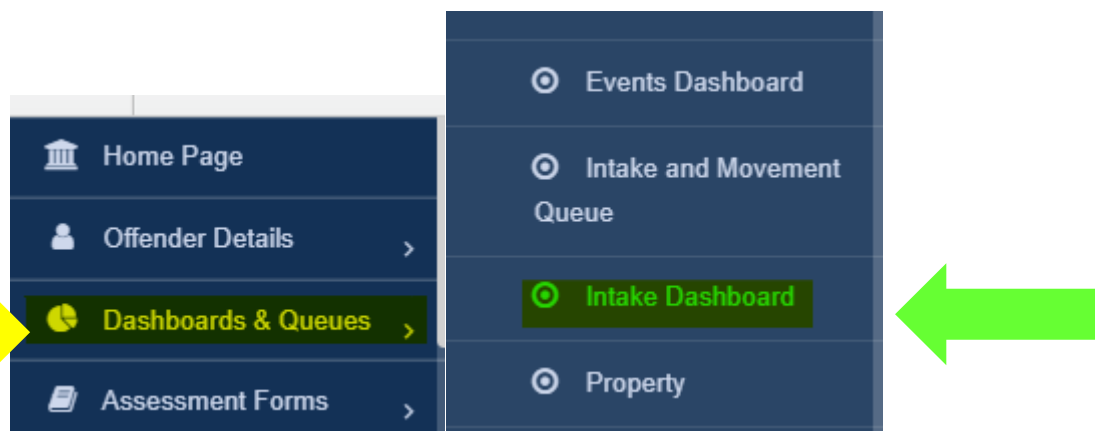
Quick Reference Guide

CASE MANAGEMENT - ADULT

Notes and Alerts

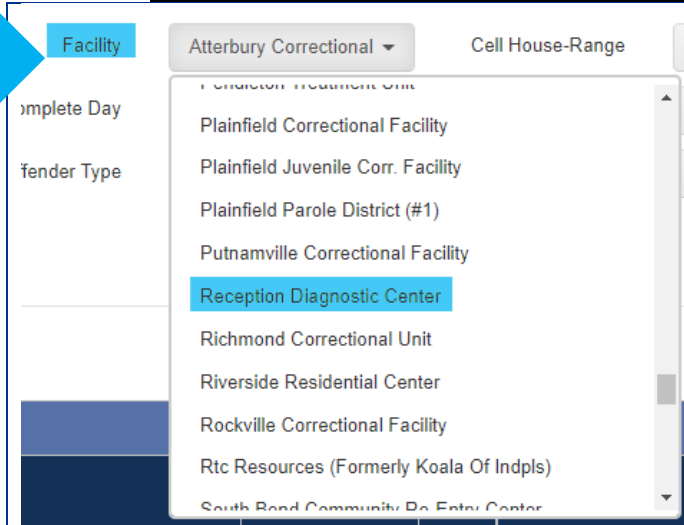
Notes & Alerts

Next, the user will move scroll down and click on **Dashboards & Queues**, then **Intake Dashboard**. This will direct the user to the **Intake Dashboard**.



Once the user has navigated to the Intake Dashboard, the user will see a Filters section at the top of the page. Beneath the Filters section is a dashboard of intakes for every DOC facility in the State of Indiana. To search for a specific facility, the user will click on the drop-down caret next to the **Facility** field and choose their facility. The screen will refresh, and the user will see that only their facility is displayed.

DELTA QUICK REFERENCE GUIDE
CASE MANAGEMENT - ADULT QUICK REFERENCE GUIDE – NOTES AND ALERTS



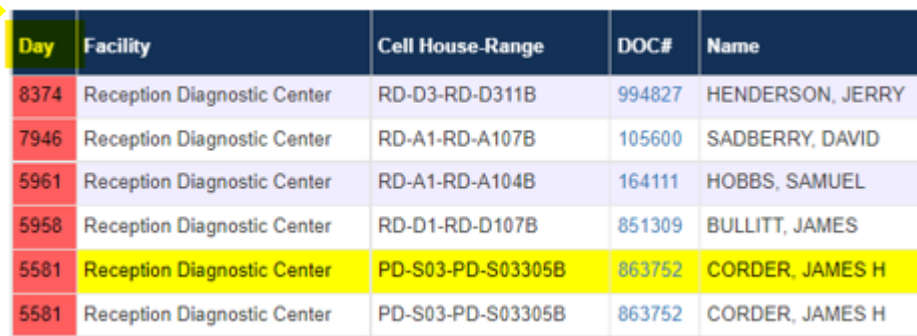
Facility: Atterbury Correctional

Cell House-Range:

- Atterbury Correctional
- Plainfield Correctional Facility
- Plainfield Juvenile Corr. Facility
- Plainfield Parole District (#1)
- Putnamville Correctional Facility
- Reception Diagnostic Center**
- Richmond Correctional Unit
- Riverside Residential Center
- Rockville Correctional Facility
- Rtc Resources (Formerly Koala Of Indpls)
- South Bend Community Re-Entry Center

Day	Facility	Cell House-Range	DOC#	Name
8374	Reception Diagnostic Center	RD-D3-RD-D311B	994827	HENDERSON, JERRY
7946	Reception Diagnostic Center	RD-A1-RD-A107B	105600	SADBERRY, DAVID
5961	Reception Diagnostic Center	RD-A1-RD-A104B	164111	HOBBS, SAMUEL
5958	Reception Diagnostic Center	RD-D1-RD-D107B	851309	BULLITT, JAMES
5581	Reception Diagnostic Center	PD-S03-PD-S03305B	863752	CORDER, JAMES H
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The first column on the dashboard is the Days column. This tells the user how many days the offender has been at that location, with the offender that has been at that location the longest at the top. To see the new intakes, the user will click on the word **Day** in the header. The screen will refresh, and the user will see that the sort has reversed and the offender with the least number of days is now displayed at the top.



Day	Facility	Cell House-Range	DOC#	Name
8374	Reception Diagnostic Center	RD-D3-RD-D311B	994827	HENDERSON, JERRY
7946	Reception Diagnostic Center	RD-A1-RD-A107B	105600	SADBERRY, DAVID
5961	Reception Diagnostic Center	RD-A1-RD-A104B	164111	HOBBS, SAMUEL
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CASE MANAGEMENT - ADULT QUICK REFERENCE GUIDE – NOTES AND ALERTS

Day	Facility	Cell House-Range	DOC#	Name
1	Reception Diagnostic Center	N/A	999849	FORTY FIVE,
2	Reception Diagnostic Center	N/A	999894	TESTONE, TE
17	Reception Diagnostic Center	N/A	234667	SMITH, JOSH
28	Reception Diagnostic Center	N/A	400078	TEST NINE, T
31	Reception Diagnostic Center	N/A	400071	TEST THIRTE
32	Reception Diagnostic Center	N/A	400069	TEST NINE T

To select an offender the user will click on the **blue** DOC#. This will direct the offender to the **Intake Summary**.

Day	Facility	Cell House-Range	DOC#	Name
1	Reception Diagnostic Center	N/A	999849	FORTY FIVE,
2	Reception Diagnostic Center	N/A	999894	TESTONE, TE
17	Reception Diagnostic Center	N/A	234667	SMITH, JOSH
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Intake Summary

Notes

On the Intake Summary screen, the user will see that the screen is broken down into 3 sections-**Notes**, **Alerts**, and Intake **Progress**.

Notes

Note Type

Description

Alerts

Alert Type

Description

Intake Progress

Activity

The first section is the **Note** section. If the user wishes to add a note, they will click on the **Add Note** button. The user will then be directed to the **Note Detail** screen.

Notes

Note Type

Description

Date/Time

View

No Record Found



Add Note

Note Detail

On the Note Detail screen, the user will use the drop-down caret to select the **Note Type** they wish to enter. Next, the user will enter the information in the **Note** field.

DELTA QUICK REFERENCE GUIDE
CASE MANAGEMENT - ADULT QUICK REFERENCE GUIDE – NOTES AND ALERTS

Note Type Select..

Note

Select..

Admission

Behavioral

CASE MANAGEMENT

Classification

CLASSNOTE

Conversion of old notes

Correspondence

CTP - Community Transition Program

Discharge

Note Type Behavioral

Note TEST

If the note being entered is also a Face-to-Face Contact the user will click the black box with an X next to the Face-to-Face Contact field. This will turn the black box with an x into a green box with a checkmark. This will automatically flag the note as a Face-to-Face Contact in addition to the selected Note Type for the user.

Face to Face Contact



Face to Face Contact

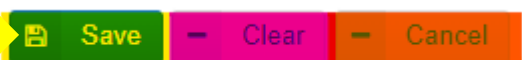


Notes

Note Type ↑	Face to Face	Description ↑	Date/Time ⌵	View
Annual Review	×	test	10/3/2022 10:16:41 AM	
Classification	×	REL TO PROB	9/19/2022 1:49:01 PM	
Classification	×	HABITUAL OFFENDERCO TIME UNTIL...	9/19/2022 1:49:01 PM	
Classification	×	CO TIME UNTIL 11/25/14 (WB)	9/19/2022 1:49:01 PM	
General	×	Offender remains in administra...	9/8/2022 3:18:51 PM	

1 2 3 4 5 6 7 8 9 10 ...

Once that has been completed, the user has the option to **Cancel**, **Clear**, or **Save**.



If the user selects **Cancel** the screen will refresh and the user will see a new window drop from the top of the screen asking the user to confirm they wish to leave the screen. It reminds them that they will lose any unsaved data. If the user selects **Cancel**, they will be directed back to the Note Detail screen. If the user selects **Yes**, the screen will refresh, and the user will be directed to the View Case Note/Alert screen. If the user selects **Clear**, the screen will refresh, and the user will see that the screen is now clear of any changes that the user made. If the user selects **Save** the screen will refresh and **Green Information Box** has appeared at the top of the page confirming that the changes were saved.

