



## here's info needed to....

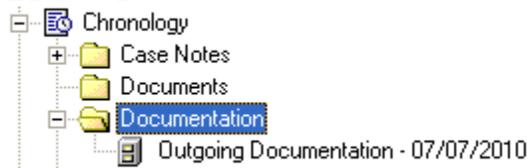
### Use the Documentation Summary screen in Chronology

**Background:** The documentation screen in Chronology is used to identify and document different forms of correspondence that are sent and/or received in the agency. Agencies track this information so that anyone who is backing them up or auditing their case can determine what has been received or sent. Examples are a birth certificate received from the parent, a letter from the school, or an audio tape of caseworker interviews with children. In another example, a worker is using statewide case access and knows there is a psychological evaluation in the hard file because it is noted on the Documentation Summary screen. Without the completed screen, it may not have been known.

#### Navigation:

1. From the Chronology node, access the **Action** menu and select **New Documentation**.
2. The Documentation Summary screen displays.
3. The **Format**, **Originator**, and **Description** drop-down fields have choices for the user. If the list does not contain a user's choice, the **alpha-numeric entry** field allows a user to enter in a particular response in the fields.
4. As the **Incoming** or **Outgoing** option is selected, the **date** field is identified with **Sent** or **Received**.
5. Make selections or enter information of your choice to complete the Documentation Summary screen and click the **Save** button.
6. Document all information that is important for evidence in maltreatment cases and ask your agency if there is a certain numbering system that is used for recording this information. If information is stored outside of the case file, indicate the **Storage location**.

#### Tree View



#### Documentation Summary Screen

**Incoming Documentation - 07/08/2010**

**Documentation Summary**

Log as:  Incoming  Outgoing

Received: 07/08/2010 03:50 pm

Format: Paper Document

Originator: Monica Jenkins, PhD

Description: Brittany Knack's Psychological Evaluation

Comments: Signed by Dr. Jenkins on 7/6/10

Storage location: Hard File

County Doc ID:

**Mentors, let all staff know about this important information screen!!!**