

# STAAND Technical User Guide for Services



Version 2.0 - 2.6 Enhancements  
Feb 2026



# Table of Contents



<b>Basic Navigation</b>	<b>3</b>
Key Navigational Features .....	3
How To: Add a New Document.....	8
How To: Add an Existing Document .....	12
<b>Service Request</b>	<b>14</b>
<b>Service Request</b>	<b>15</b>
How To: Create a Service Request .....	15

*This document is interactive. Select the page desired to land on.  
To return to the Table of Contents, select the page number or logo in the page footer.*

# Basic Navigation



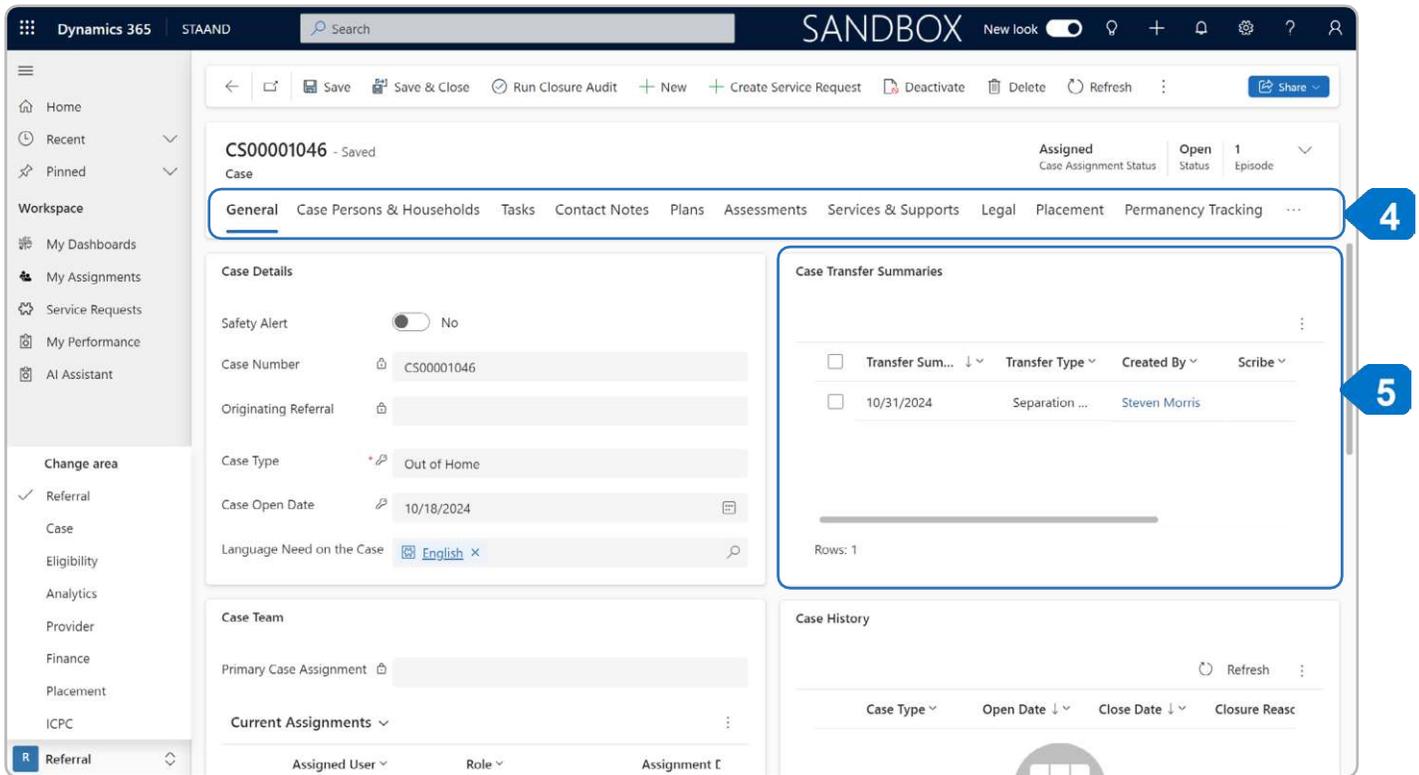
## Key Navigational Features

The key elements of any STAAND page include the following:

1. **Action Toolbar:** is always visible, but the options change based on the current page or the save status of the record. Selecting Save can alter the available options.
2. **Site Map:** is located on the left side of the page and helps navigate the Work area.
3. **Site Map Work Area Selector:** is a dropdown menu at the bottom of the Site Map that displays different work areas in STAAND.

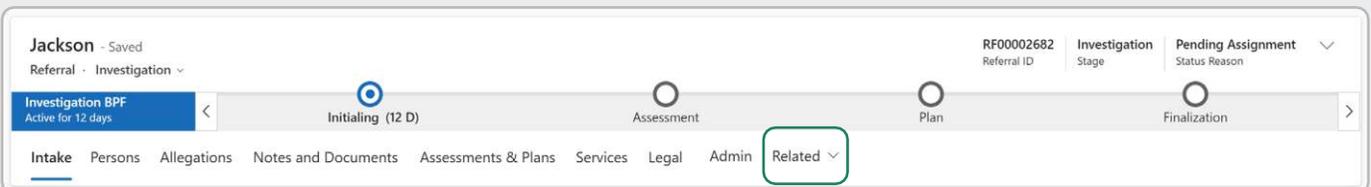
The key elements of a record will include:

- 4. Tabs:** show different groups of information related to that record.
- 5. Subgrid:** is a section of information on the page. It can be formatted as a table, or contain fields that require manual input.



## Note:

There are many tabs, and sometimes excess tabs are found under the Related tab, or a  More Commands option.



Important Icons to understand includes:

1. **Red asterisk:** Fields marked with a red asterisk are mandatory and must be completed.



A screenshot of a form with four fields. A blue callout box with the number '1' points to a red asterisk icon next to the 'Document Sub Type' field. The 'Document Sub Type' field contains 'Investiga...'. The 'Title' field contains 'Investigation Sum...'. The 'Document Extension' field contains '---'. The 'Document Signed' field contains 'No'.

2. **Blue plus sign:** Fields marked with a blue plus sign indicate Federal-related information and, while not required, it is recommended that these fields be completed.



A screenshot of a form with three fields. A blue callout box with the number '2' points to a blue plus sign icon next to the 'Date of Birth' field. The 'Respondent' field contains 'Amaya Harris'. The 'Date of Birth' field contains '3/17/2020'. The 'Sex Assigned at Birth' field contains 'Female'.

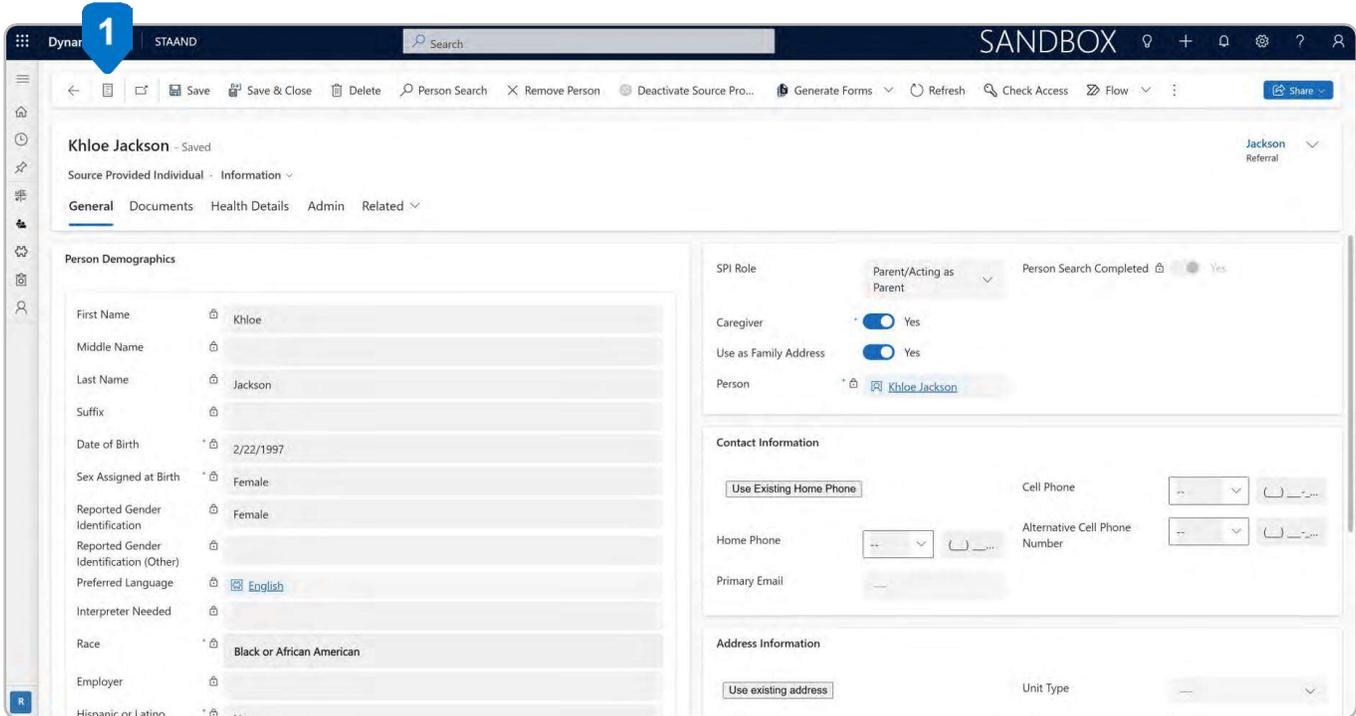
### Important Tip:

STAAND is a responsive solution that updates and adapts as new information is entered. Occasionally, while the system is updating, users may need to select Refresh, or Save, in the Action Toolbar to ensure that all information is properly populated.



When within a record, a Record Set Icon  will appear within the Action Toolbar.

1. View/update information within a record, then select the Record Set icon. This will allow the user to toggle between similar records within the same Referral, Investigation, and Case.



The screenshot displays the DynaCare interface for a record titled "Khloe Jackson - Saved". The interface includes a top navigation bar with "DynaCare" and "STAAND" logos, a search bar, and a "SANDBOX" environment indicator. The Action Toolbar at the top contains various icons, with a blue circle and the number "1" highlighting the Record Set Icon. The record details are organized into several sections: "Personal Demographics" (First Name: Khloe, Middle Name, Last Name: Jackson, Suffix, Date of Birth: 2/22/1997, Sex Assigned at Birth: Female, Reported Gender Identification: Female, Preferred Language: English, Race: Black or African American), "SPI Role" (Parent/Acting as Parent), "Caregiver" (Yes), "Use as Family Address" (Yes), "Contact Information" (Home Phone, Cell Phone, Alternative Cell Phone Number, Primary Email), and "Address Information" (Use existing address, Unit Type).

### Note:

In this example, the SPI records of Tina Rodriguez, Kevin Jackson, and Kourtney Jackson are SPIs within the same investigation as Khloe Jackson.

2. Select the next record from the Record Set window to view/update information within the record.

The screenshot shows the Dynamics 365 interface for a 'Source Provided Individual' record set. The left-hand pane displays a list of records with a blue arrow pointing to the second record, 'Kevin Jackson', which has a date of birth of 3/23/2010. The main pane shows the details for 'Kevin Jackson', including a 'Demographics' section with fields for First Name (Kevin), Last Name (Jackson), Date of Birth (3/23/2010), Sex Assigned at Birth (Male), and Race (Black or African American). Other sections include 'Contact Information' and 'Address Information'.



### Important Tip:

The Record Set icon can be used to toggle between similar records without needing to search through the application for a record.

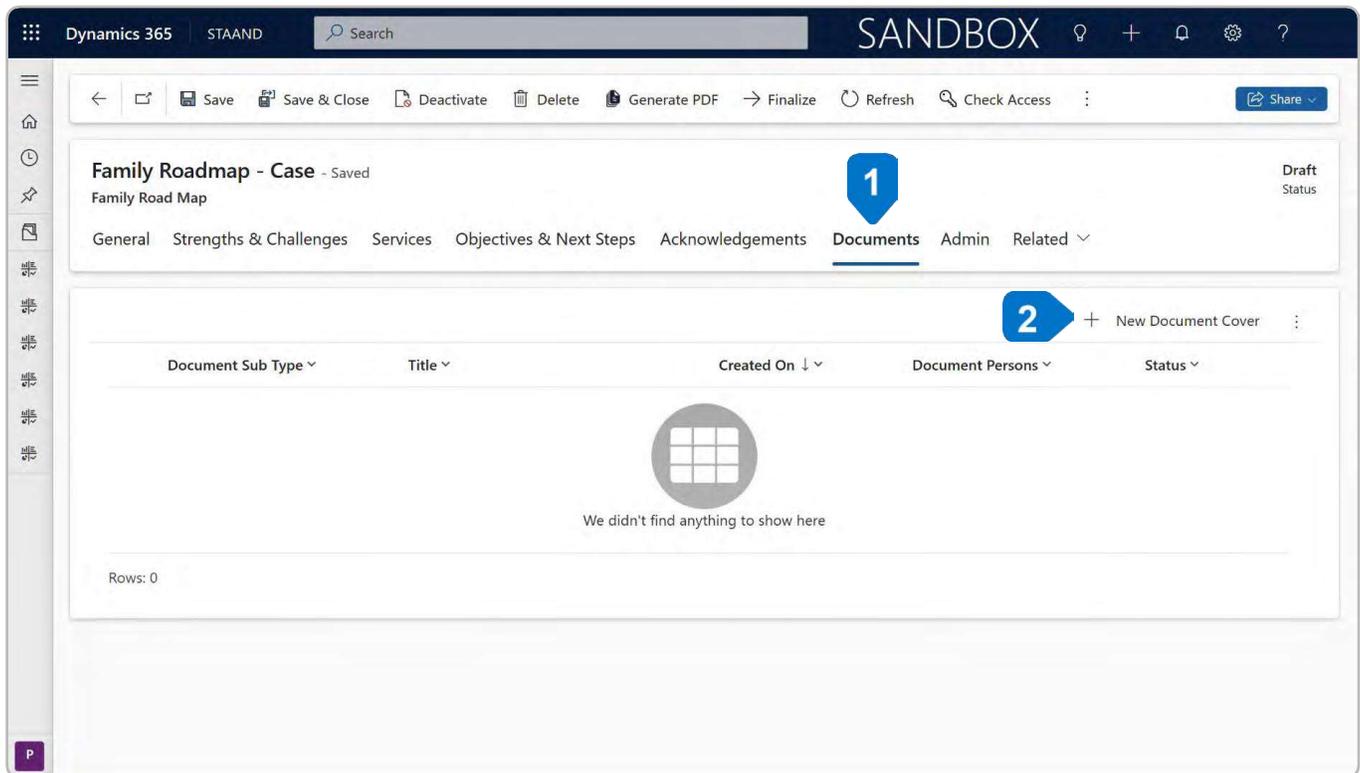
# How To: Add a New Document



## Note:

Documents are not required, however can be added under Document tabs for most referrals, records, plans, and/or reports.

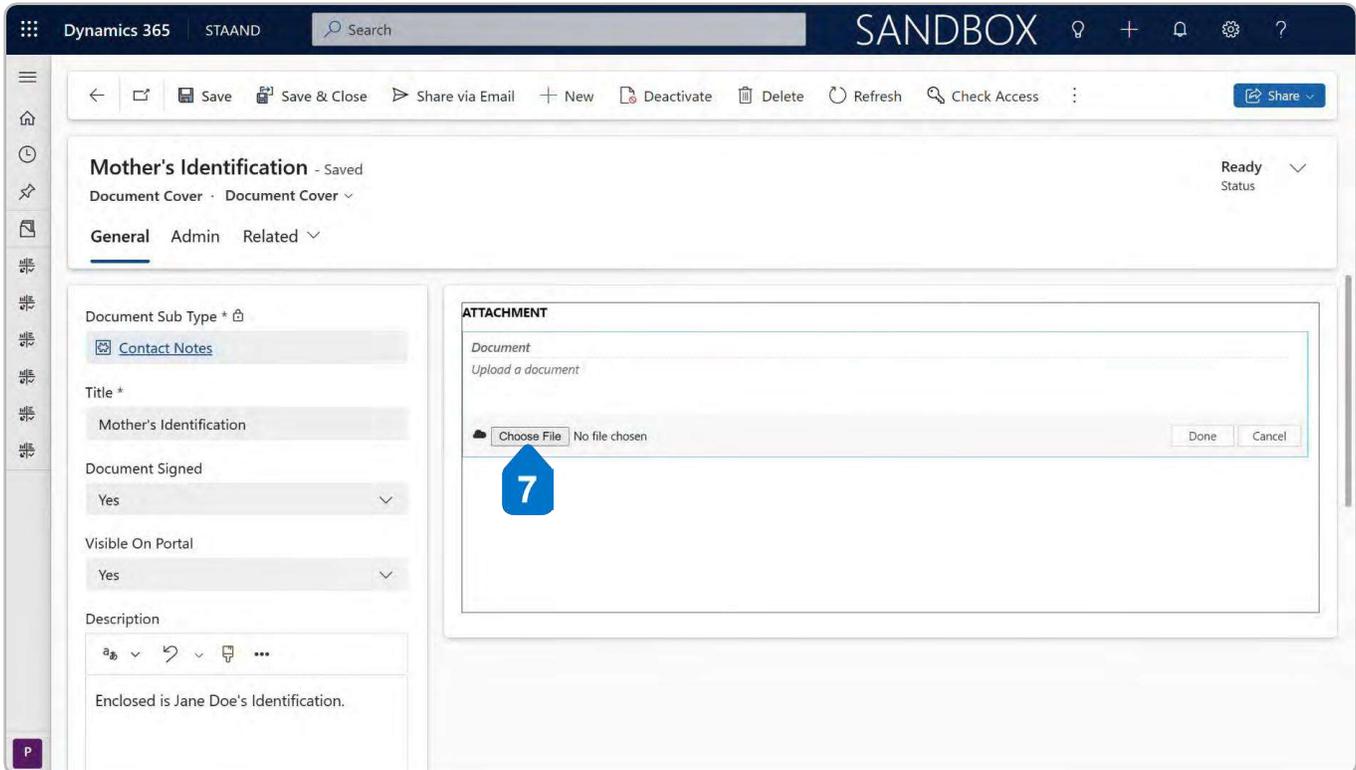
1. Select the Documents tab.
2. Select + New Document Cover.



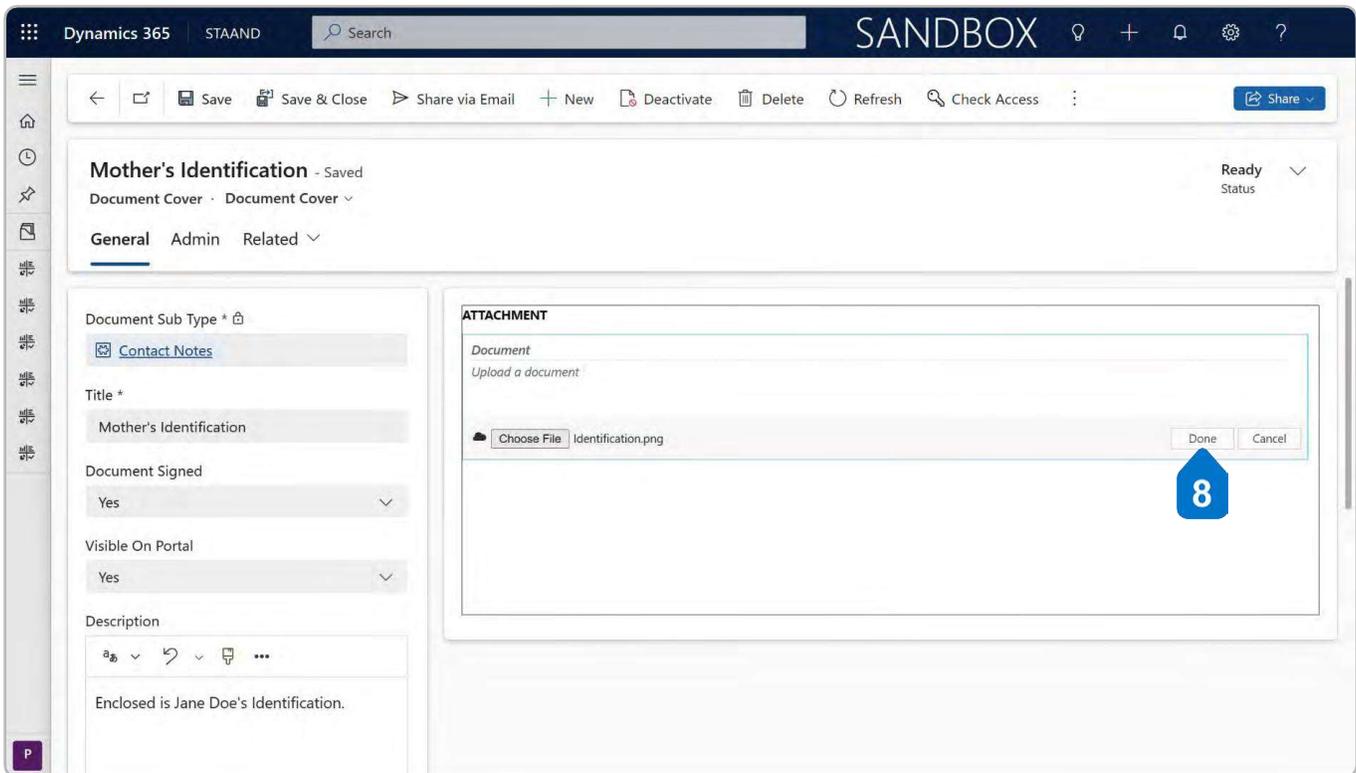
3. Use the Lookup icon to select the Document Sub Type.
4. Enter the Title of the Document.
5. Complete all remaining fields.
6. Select Save. More fields will populate.

The screenshot displays the Dynamics 365 interface for creating a new document cover. The top navigation bar includes 'Dynamics 365 AND', a search bar, and 'SANDBOX'. The main area shows a 'New Document Cover - Unsaved' form with a 'Ready Status' dropdown. The form is divided into sections: 'General' and 'Document Signed'. The 'Document Signed' section includes dropdowns for 'Document Signed' (set to 'No') and 'Visible On Portal' (set to 'No'), and a 'Description' text area. Three blue callout boxes with white numbers are overlaid on the form: '3' points to the 'Document Sub Type' lookup field, '4' points to the 'Title' text field, and '5' points to the 'Visible On Portal' dropdown. The left sidebar contains navigation icons, and the top toolbar includes 'Save', 'Save & Close', 'New', and 'Flow' options.

7. Under the Attachment subgrid select Choose File.



8. Once the file is chosen and attached, select Done.



## 9. Select Save & Close.

The screenshot shows the Dynamics 365 interface for a document titled "Mother's Identification". The document is in a "Ready" status. The left-hand pane shows the document details, including the title "Mother's Identification", the document signed status "Yes", and the visible on portal status "Yes". The description field contains the text "Enclosed is Jane Doe's Identification." The right-hand pane shows the "ATTACHMENT" section with an upload button and a list of attachments, including "Identification.png (156.14 kB)". The "Save & Close" button in the top navigation bar is highlighted with a blue circle containing the number 9.

## 10. The Document is now available under the Documents tab.

The screenshot shows the Dynamics 365 interface for a document titled "Family Roadmap - Case". The document is in a "Draft" status. The left-hand pane shows the document details, including the title "Family Road Map", the document signed status "Yes", and the visible on portal status "Yes". The right-hand pane shows the "DOCUMENTS" section with a table listing the document "Mother's Identification" with a status of "Ready". The "Documents" tab is selected in the top navigation bar. A blue circle with the number 10 is overlaid on the "Ready" status in the table.

<input type="checkbox"/>	Document Sub Type	Title	Created On	Document Persons	Status
<input type="checkbox"/>	Contact Notes	Mother's Identification	1/10/2025 2:54 PM		Ready

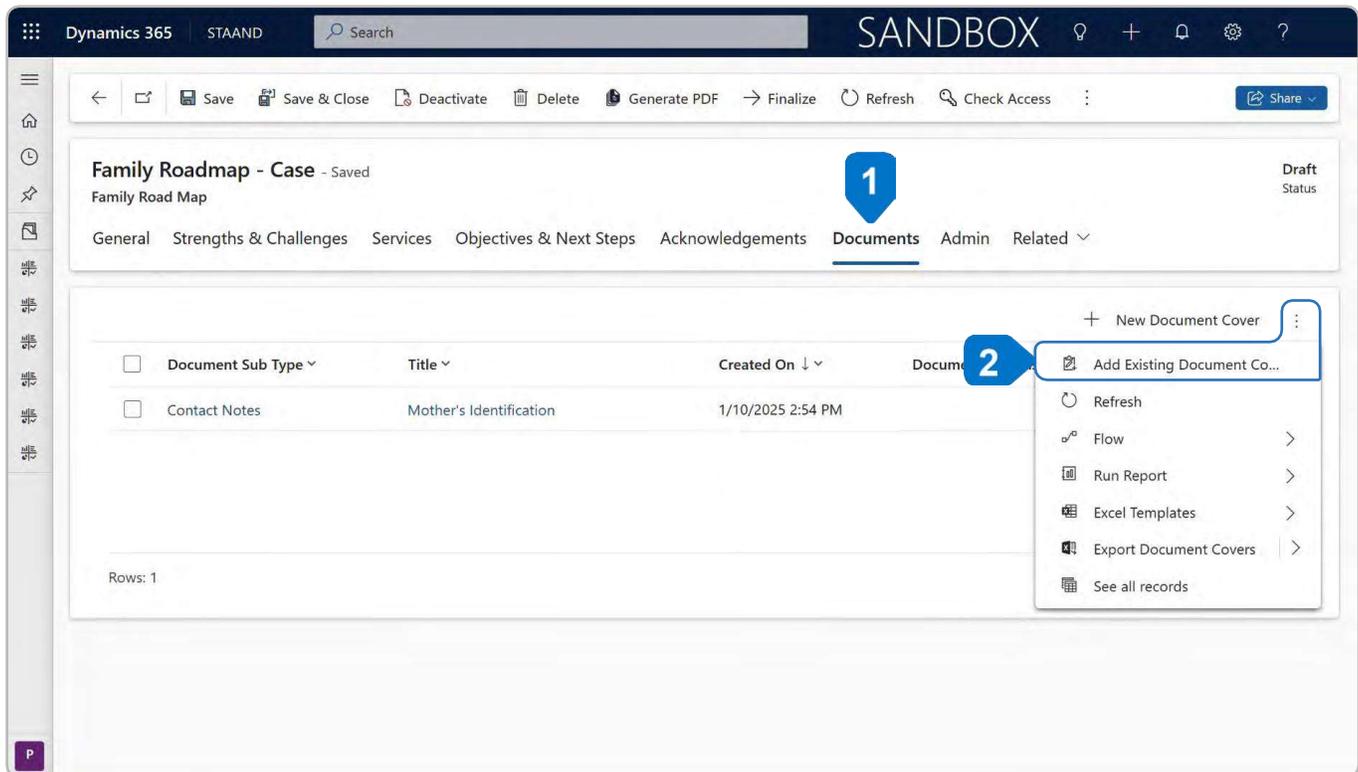
# How To: Add an Existing Document



## Note:

Once the Document is created it can be searched and added to a multitude of referrals, records, plans, and/or reports within STAAND.

1. Select the Documents tab.
2. Select Add Existing Document Cover. If not visible, select the  More Commands option.



3. Use the Lookup Records to select the document.
4. Select Add.

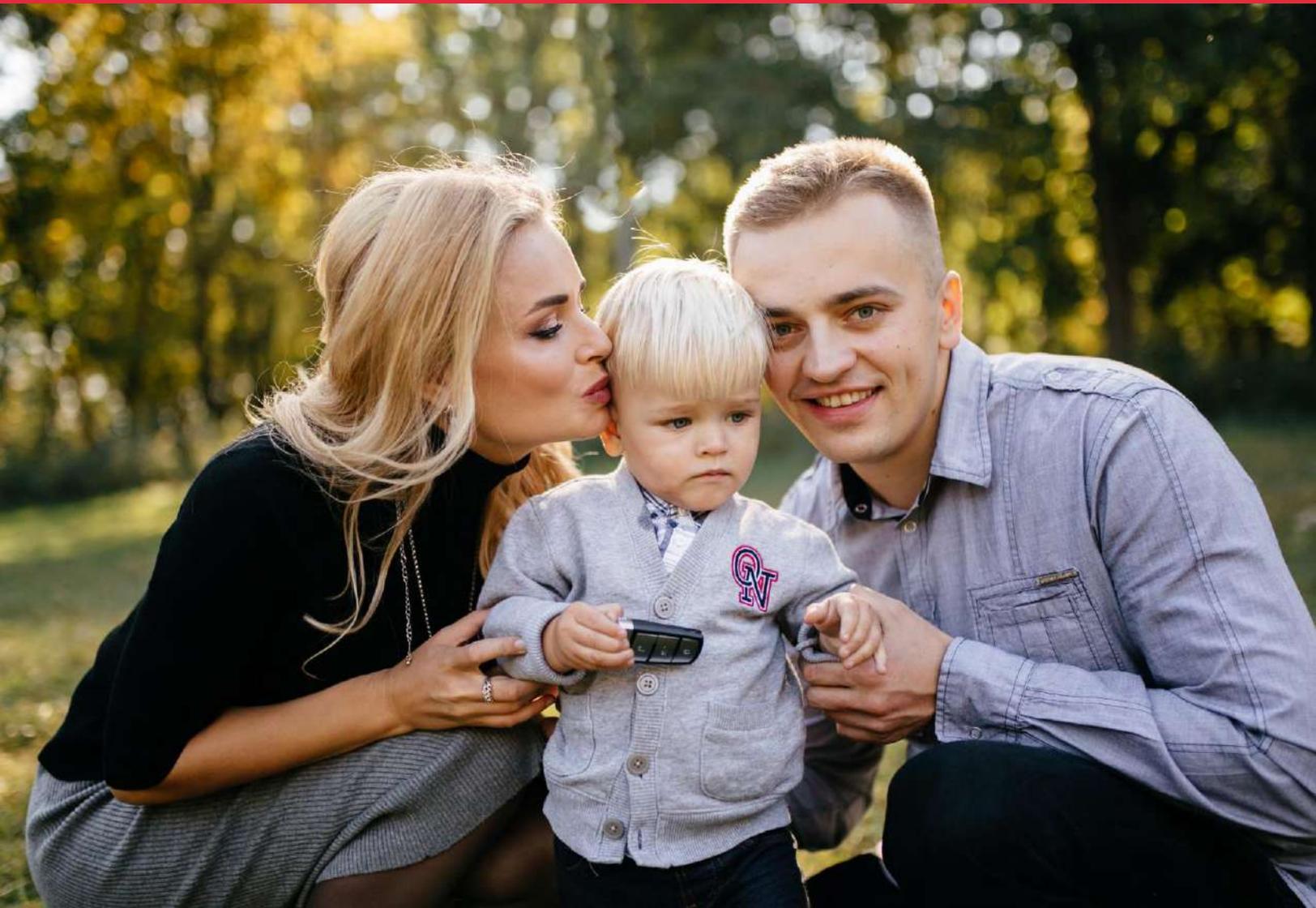
The top screenshot shows the Dynamics 365 interface for a 'Family Roadmap - Case'. A 'Lookup Records' dialog box is open, allowing the user to search for records. The dialog includes a search bar, tabs for 'Recent records' and 'All records', and a list of records: 'Child Ward's Document' and 'Mother's Identification'. A blue callout '3' is positioned to the right of the dialog.

The bottom screenshot shows the same case view with the 'Documents' tab selected. A table lists documents with columns for 'Document Sub Type', 'Title', 'Created On', 'Document Persons', and 'Status'. The table contains two rows: 'Ward Letter' (Child Ward's Document, 1/10/2025 2:57 PM, Ready) and 'Contact Notes' (Mother's Identification, 1/10/2025 2:54 PM, Ready). A blue callout '4' points to the 'Add' button, and a blue callout '5' points to the 'Ready' status of the second row.

### Important Tip:

If not immediately populated under the Documents tab select Refresh from the Action Toobar.

# Service Request



# Service Request



## How To: Create a Service Request

1. To initiate a Services Request select + Create Service Request from the Action Toolbar.

NOTE: This will launch a new browser that will bring the STAAND user to the Quickbase ServiceHub Application for a seamless submission.

The screenshot shows the Dynamics 365 STAAND interface. At the top, there is a search bar and a '1' in a blue circle. Below the search bar, there is a toolbar with buttons for 'Save', 'Save & Close', '+ New', '+ Create Service Request', 'Validate', 'Generate Investigation...', 'Associated History', 'Refresh', 'Check Access', and 'Share'. The main content area shows a form for 'Jackson70 - Saved' with a progress bar indicating the stages: 'Initialing', 'Assessment', 'Plan (53 Hrs)', and 'Finalization'. The 'Plan (53 Hrs)' stage is currently active. The form includes sections for 'Reporting Source', 'Intake Worker Narrative', 'Reporter Narrative', 'Intake Screening Decision', 'Mental Health Questionnaire', 'Positive Toxicity Questionnaire', and 'Human Trafficking Questionnaire'. The 'Reporting Source' section has fields for 'Method of Contact' (Other), 'Reporter Description', 'Reporter' (Don Keith), 'Primary Email', 'Cell Phone', 'Reporter Type', and 'Employer'. The 'Intake Worker Narrative' and 'Reporter Narrative' sections have a 'Test' field. The 'Intake Screening Decision' section has a 'Screen in' field and a 'Response Priority' field (Response Within 24 hours). The 'Mental Health Questionnaire' and 'Human Trafficking Questionnaire' sections have 'Do you have any mental health concerns regarding the child and/or family?' and 'Do you have concerns related to human trafficking or sexual exploitation of a youth?' questions, respectively, with 'No' as the selected answer.



### Important Tip:

Users can initiate Service Requests from multiple work areas within STAAND, including Referrals, Investigations and Cases, and Person Records.



- To view service participation progress, navigate to the Participant Rating section on Delivery tab. This is also where users are able to enter timeline notes relevant to this service.

The screenshot shows the SR-1020 Service Request interface. At the top, the status is "SR-1020 - Saved Service Request" and "Pending Service Navigator Recommendation". The navigation tabs include "Request", "Finalize", "Delivery" (selected), "Closure", "Documents", "Admin", and "Related". The "Participation Ratings" section is active, displaying a table with columns: Name, Time to Complete, Service Participation, Service Impact, and Service Adjustment Plan. A single row is visible with the ID "SP-1016". To the right, the "Timeline" section is open, showing a search bar, a note entry field, and a "Get started" prompt with the text "Capture and manage all records in your timeline."

- To document service request closure information, navigate to Closure tab.

The screenshot shows the SR-1020 Service Request interface with the "Closure" tab selected. The top navigation tabs are "Request", "Finalize", "Delivery", "Closure" (selected), "Documents", "Admin", and "Related". On the left, there are input fields for "Service End Date" and "Service Outcome". The main area is the "Closure Narrative" section, which features a rich text editor with a toolbar containing icons for bold, italic, underline, strikethrough, link, unlink, list, and other text formatting options. The editor is currently empty.

6. To view service log results from Service Requests, navigate to Service Log subgrid on the Services and Supports Tab.

Services & Supports   Legal   Family Engagement   Placement   Permanency Tracking   Documents   Separation   ...

Service Request   ⌵

igator ...   ⌵

Services

Ongoing Services   ⌵   + New Service Request   ⌵

Approved Service   ⌵	Provider   ⌵	Service Start Date   ⌵	⌵
 We didn't find anything to show here			

Rows: 0

