STAAND Technical User Guide for Services

Version 2.0 - 2.6 Enhancements
Feb 2026

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Basic Navigation

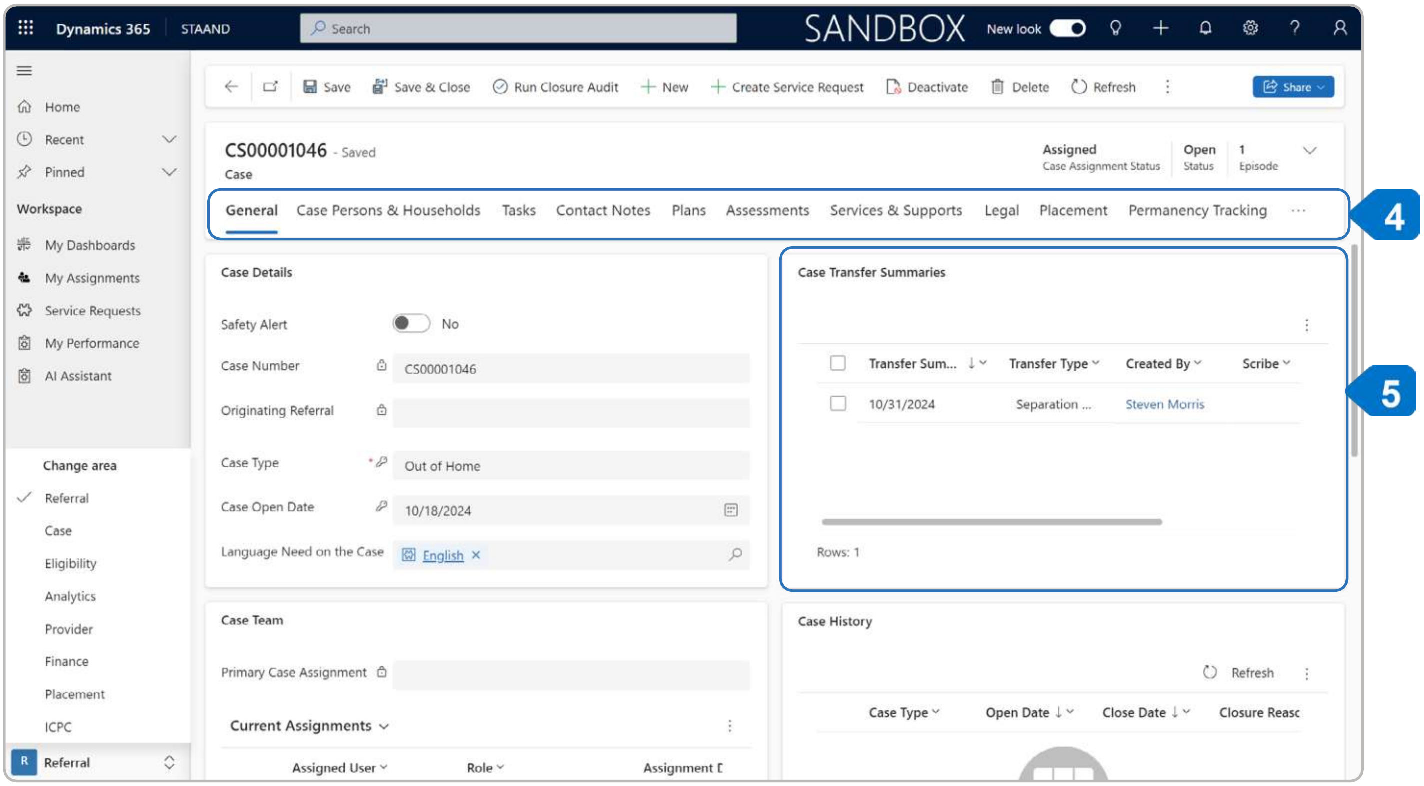
Key Navigational Features

The key elements of any STAAND page include the following:

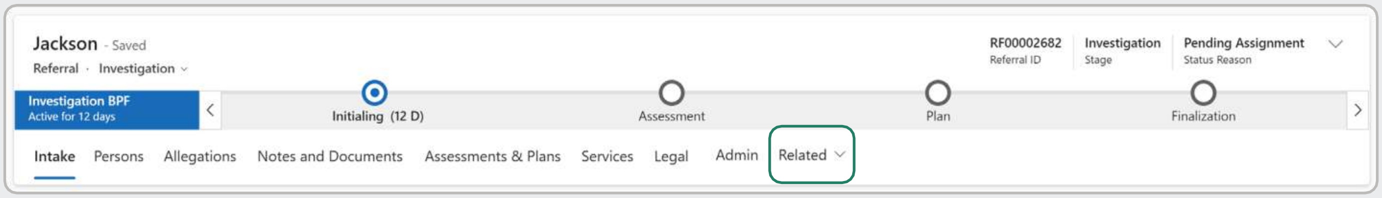
1. **Action Toolbar:** is always visible, but the options change based on the current page or the save status of the record. Selecting Save can alter the available options.
2. **Site Map:** is located on the left side of the page and helps navigate the Work area.
3. **Site Map Work Area Selector:** is 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.

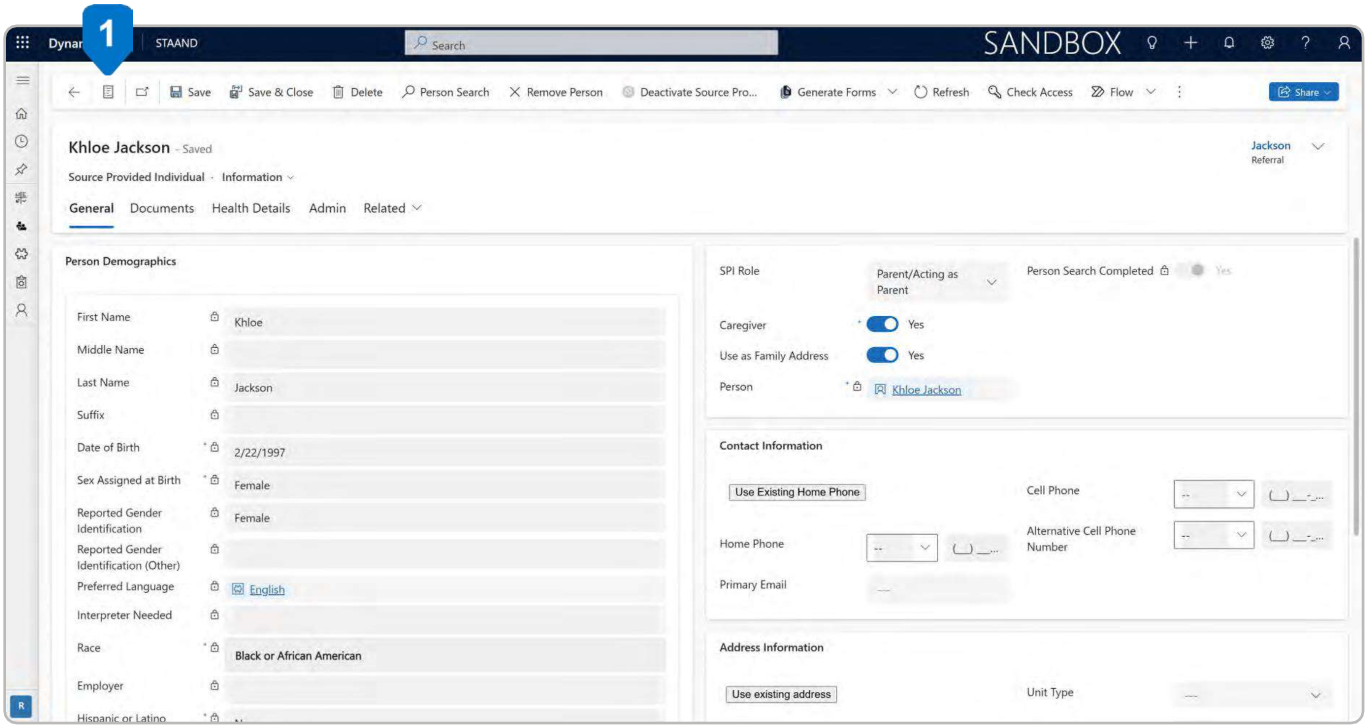
2. **Blue plus sign:** Fields marked with a blue plus sign indicate Federal-related information and, while not required, it is recommended that these fields be completed.

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.

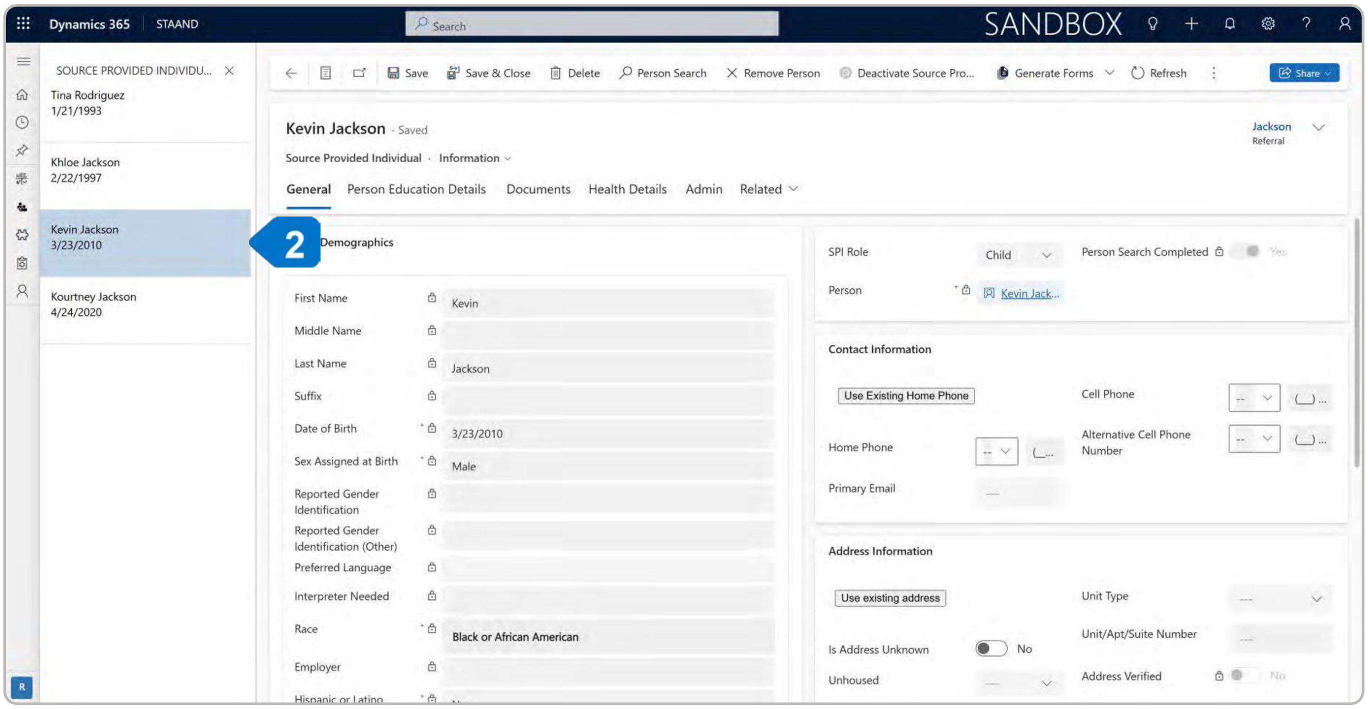
1. View/update information within a record, then select the Record Set icon. This will allow the user to toggle between similar records within the same Referral, Investigation, and Case.



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.



Important Tip:

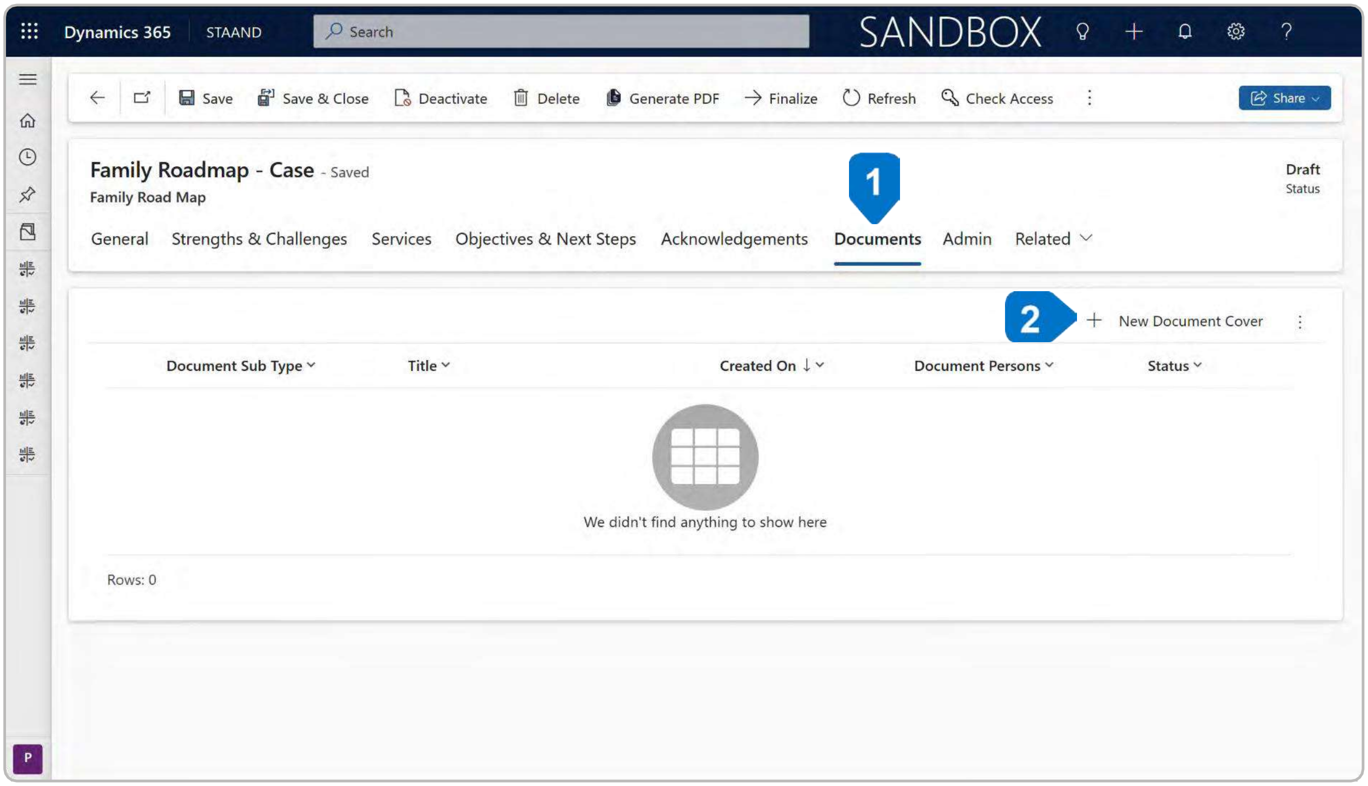
The Record Set icon can be used to toggle between similar records without needing to search through the application for a record.

How To: Add a New Document

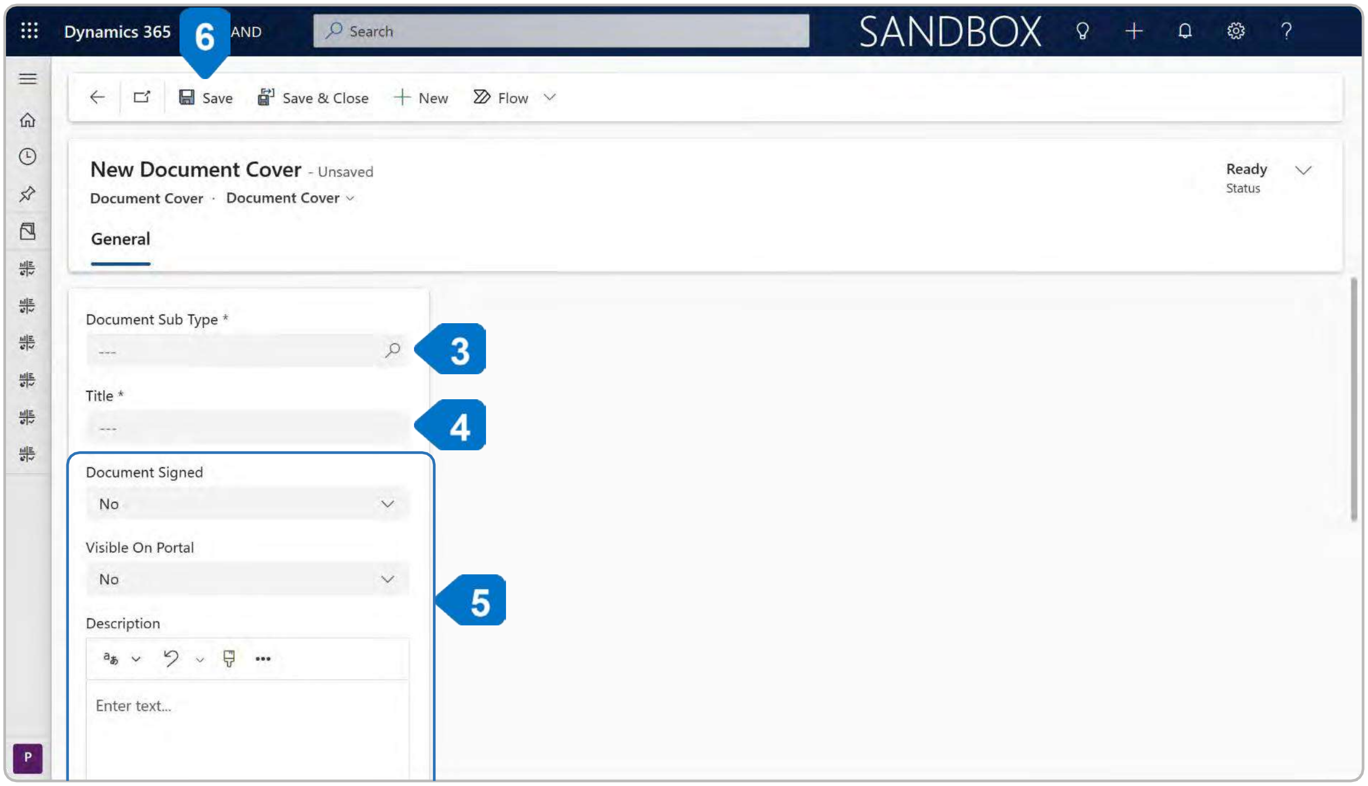
Note:

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

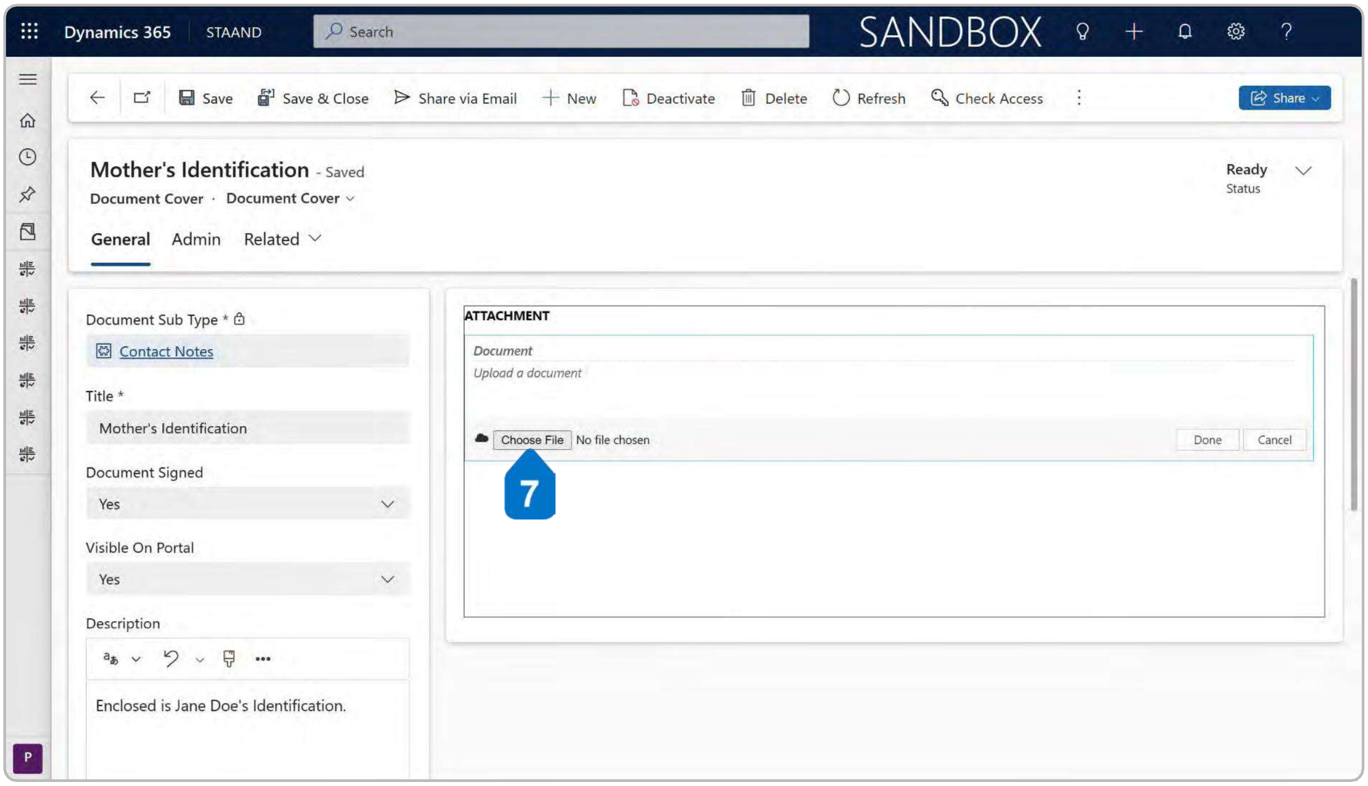
1. Select the Documents tab.
2. Select + New Document Cover.



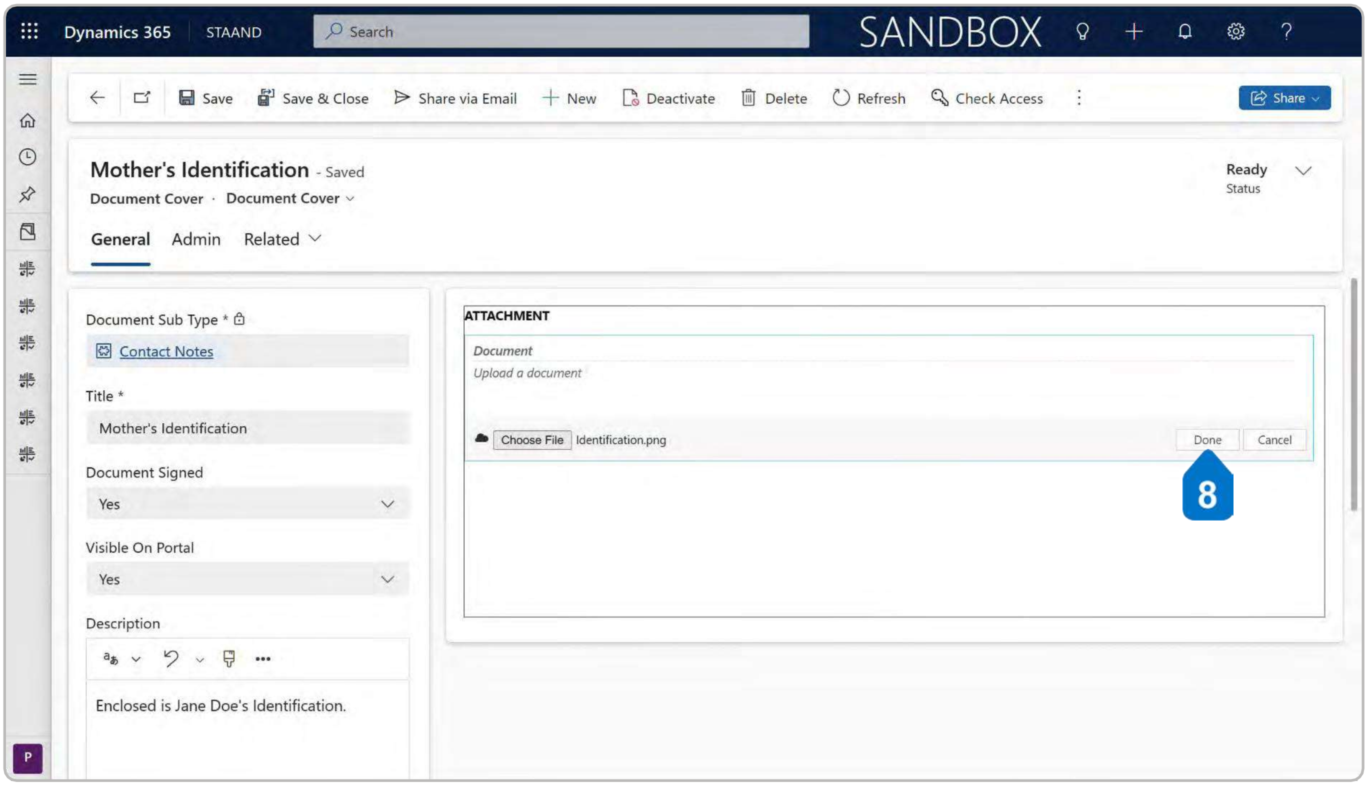
3. Use the Lookup icon to select the Document Sub Type.
4. Enter the Title of the Document.
5. Complete all remaining fields.
6. Select Save. More fields will populate.



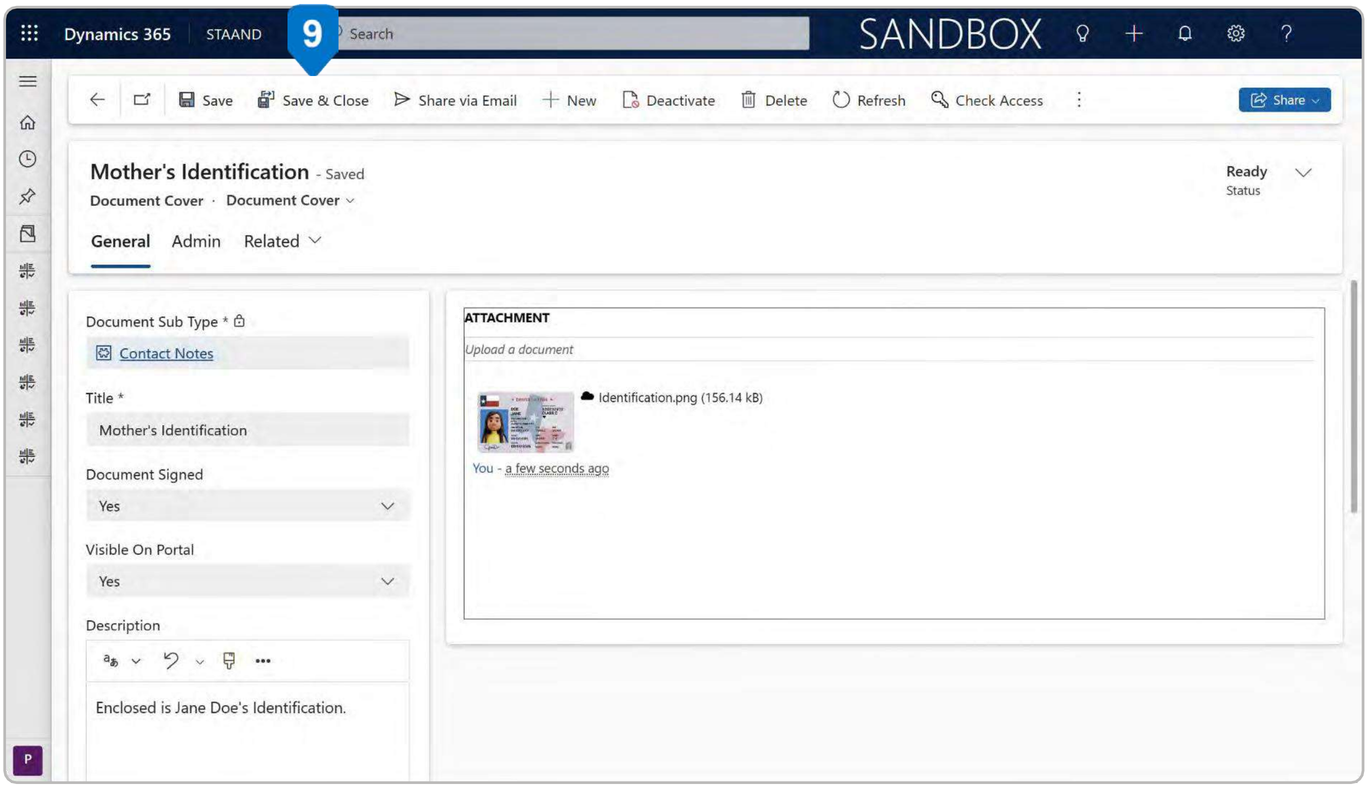
7. Under the Attachment subgrid select Choose File.



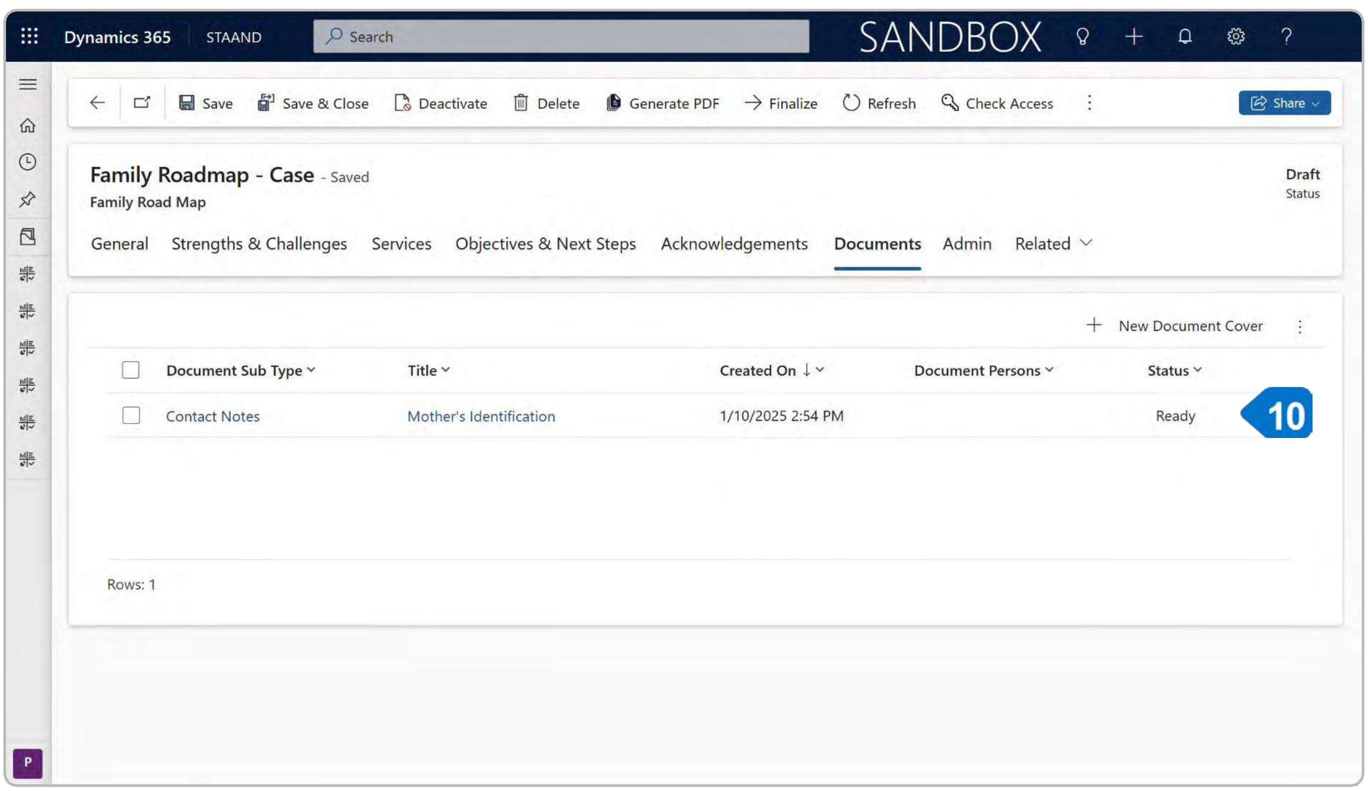
8. Once the file is chosen and attached, select Done.



9. Select Save & Close.



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

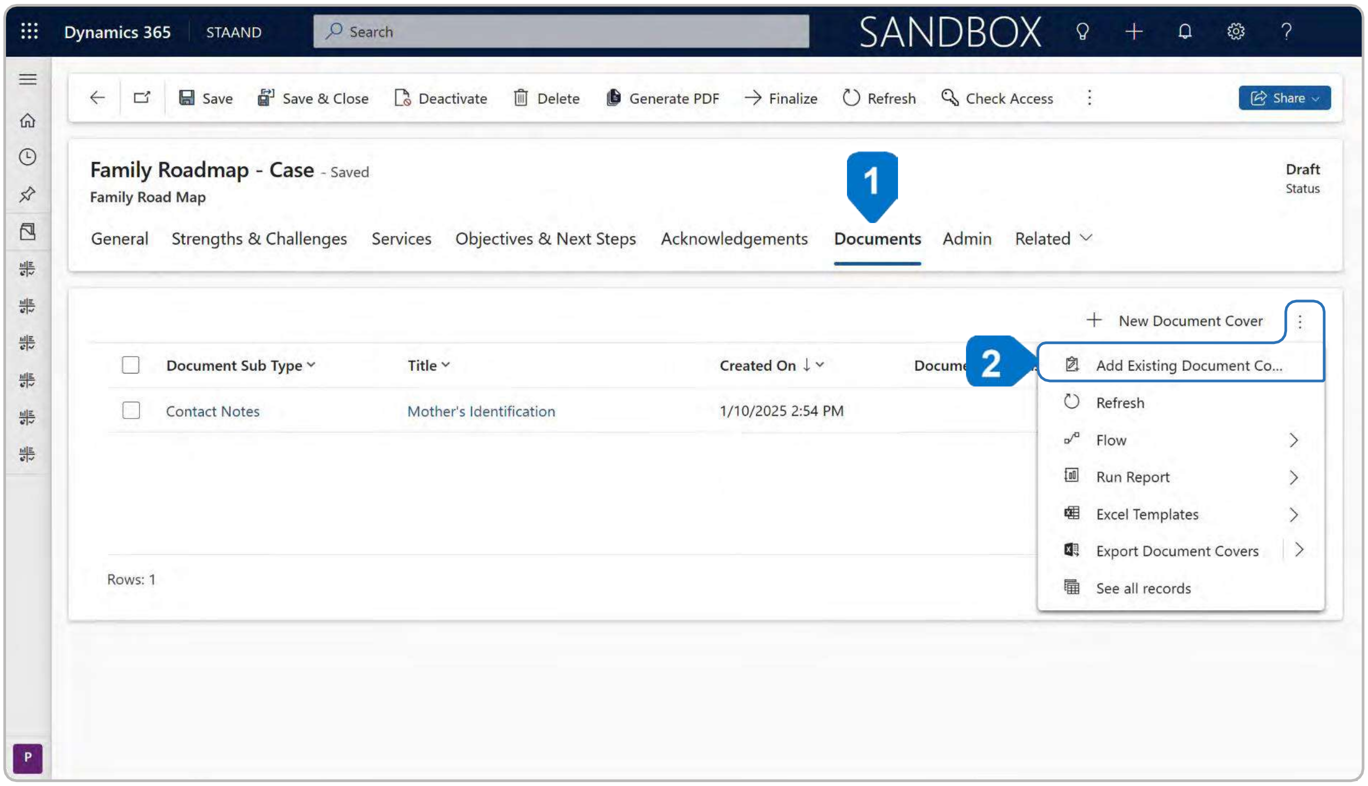


How To: Add an Existing Document

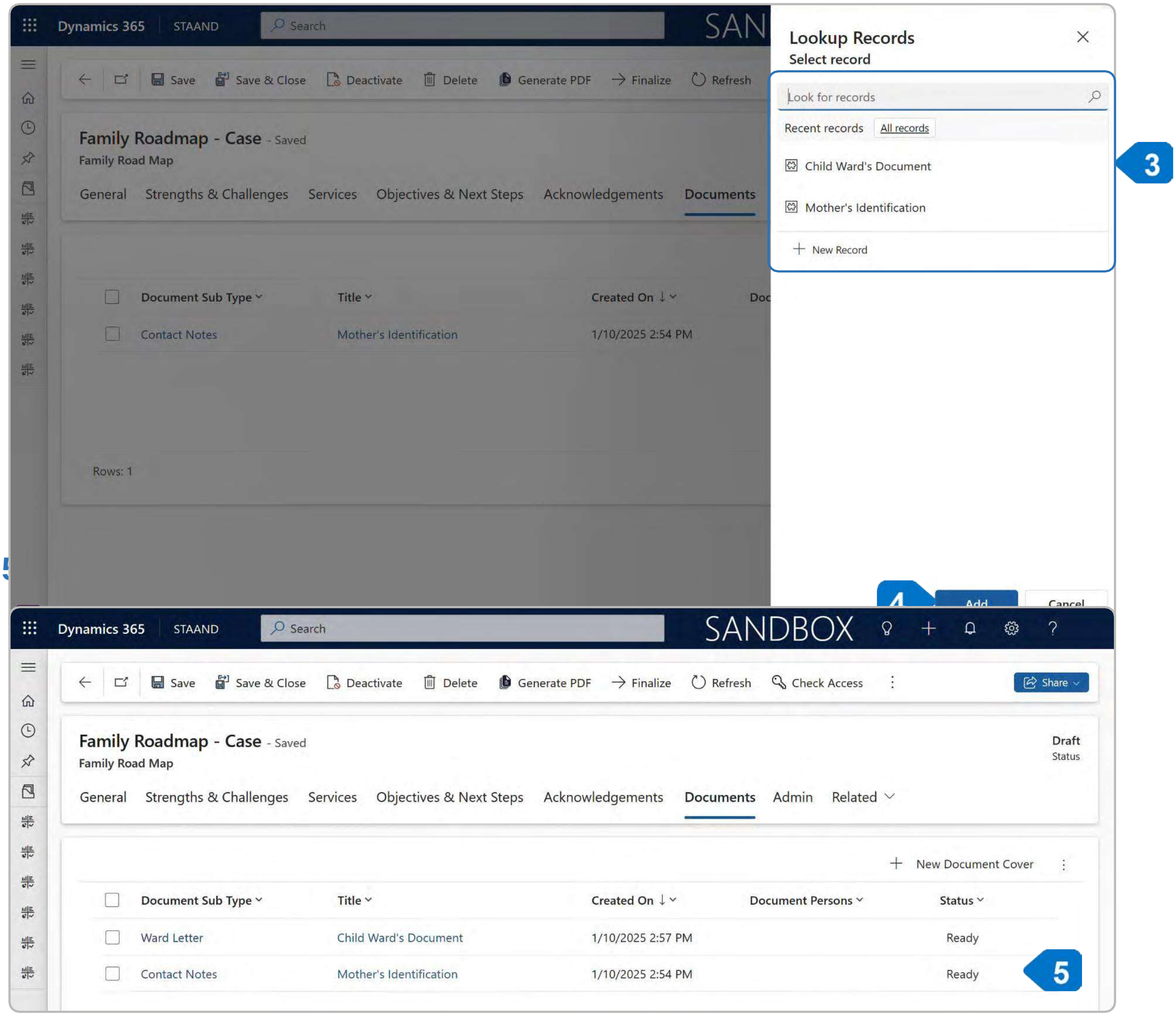
Note:

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.



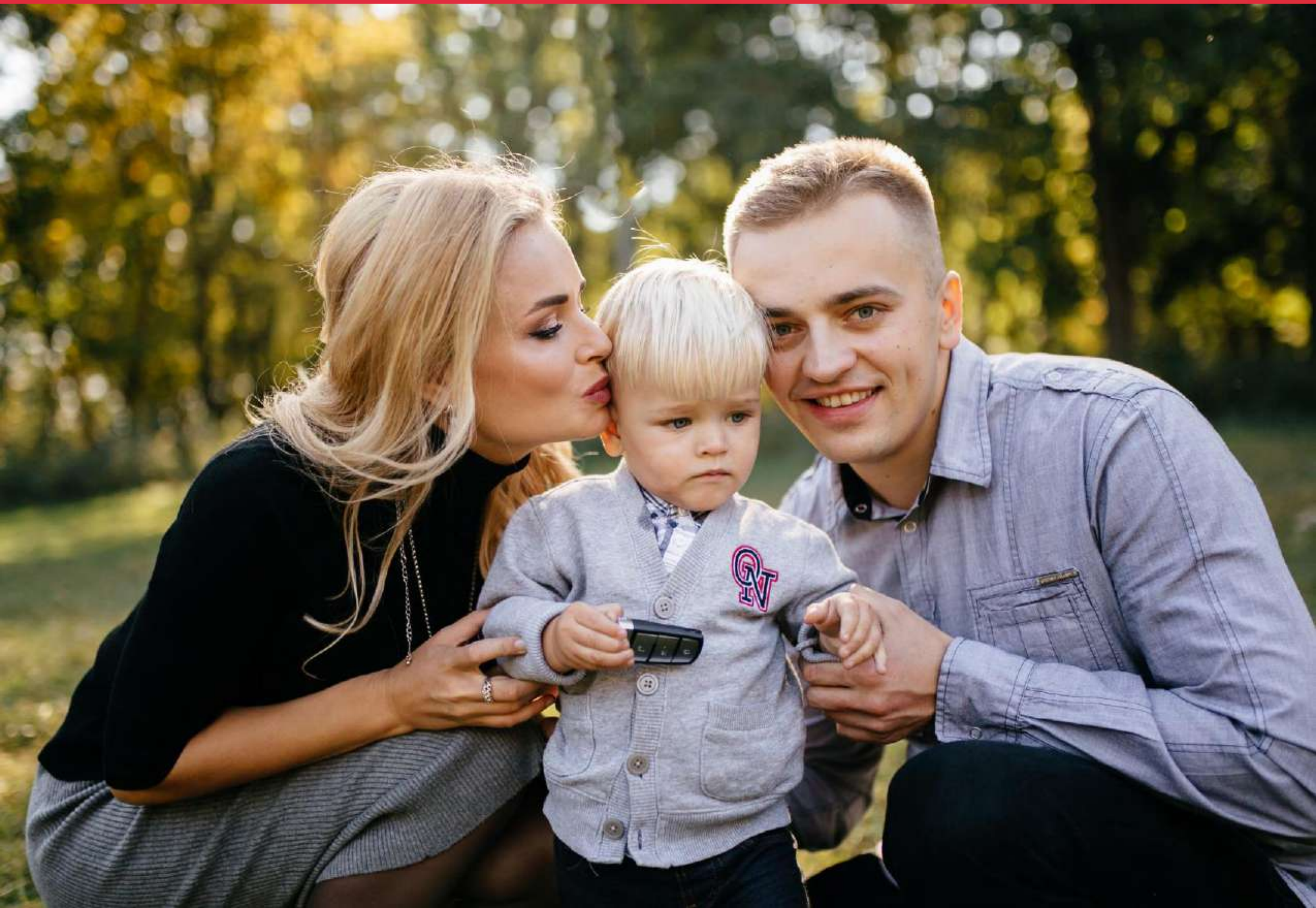
3. Use the Lookup Records to select the document.
4. Select Add.



Important Tip:

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

Service Request

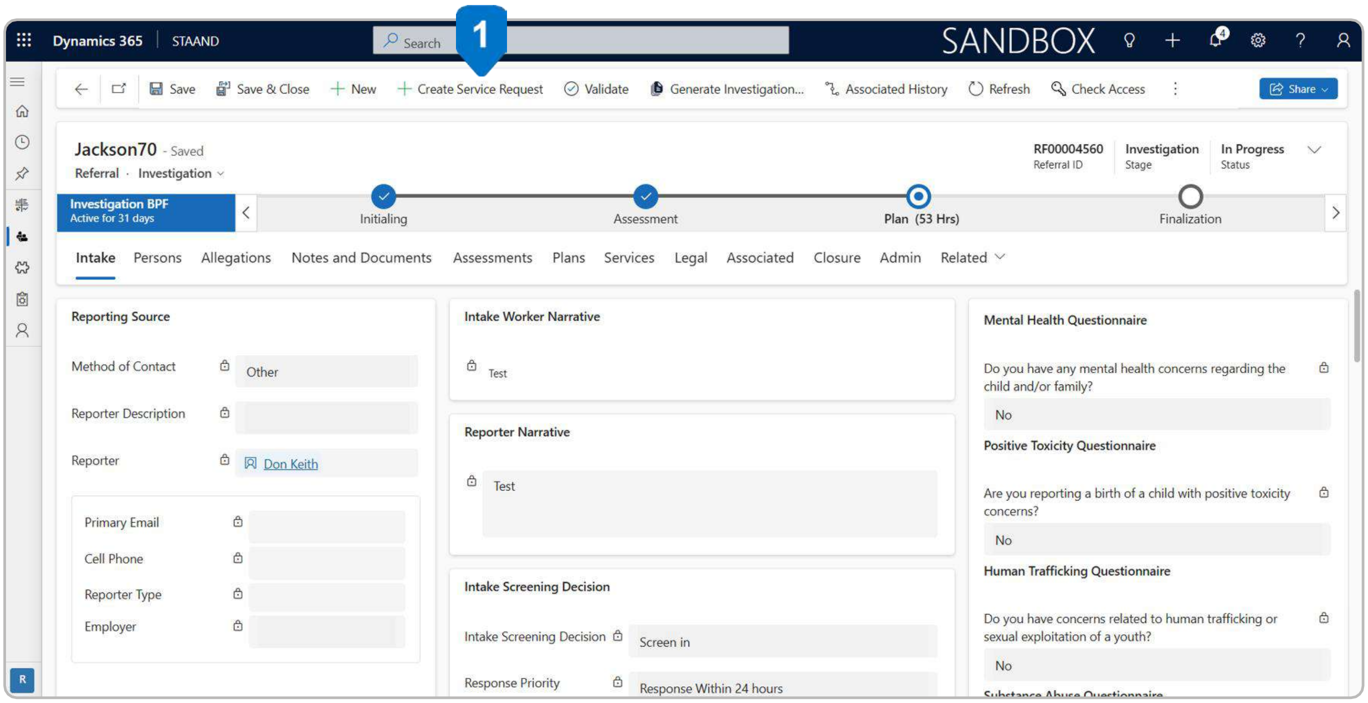


Service Request

How To: Create a Service Request

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

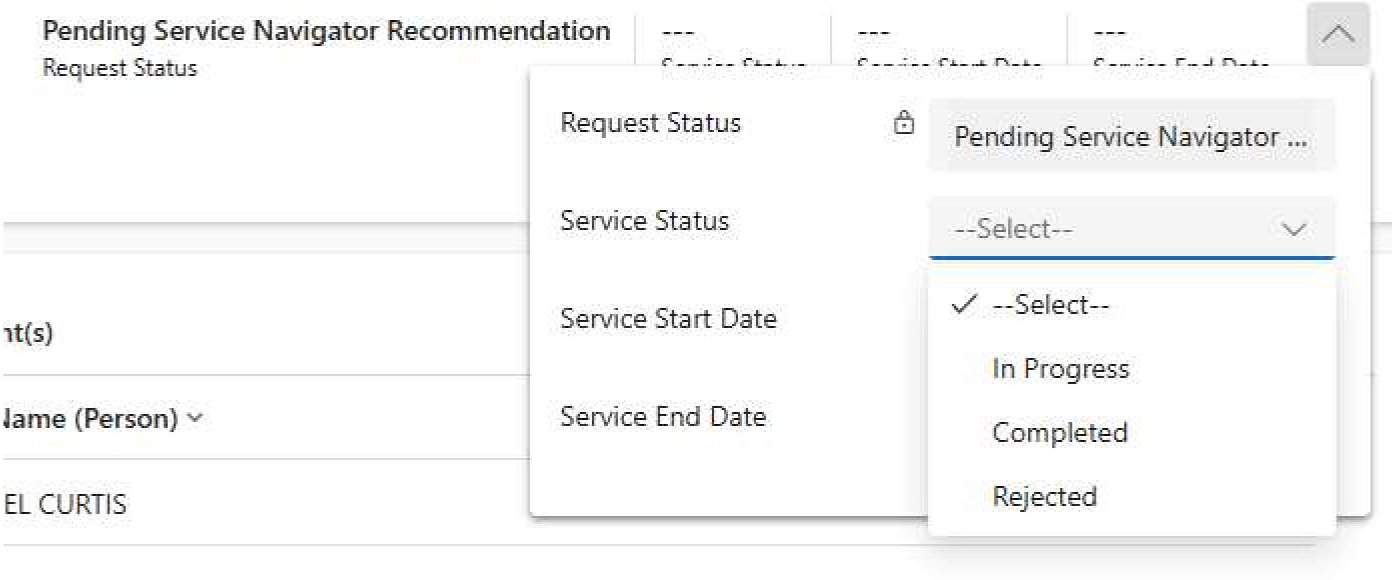
NOTE: This will launch a new browser that will bring the STAAND user to the Quickbase ServiceHub Application for a seamless submission.



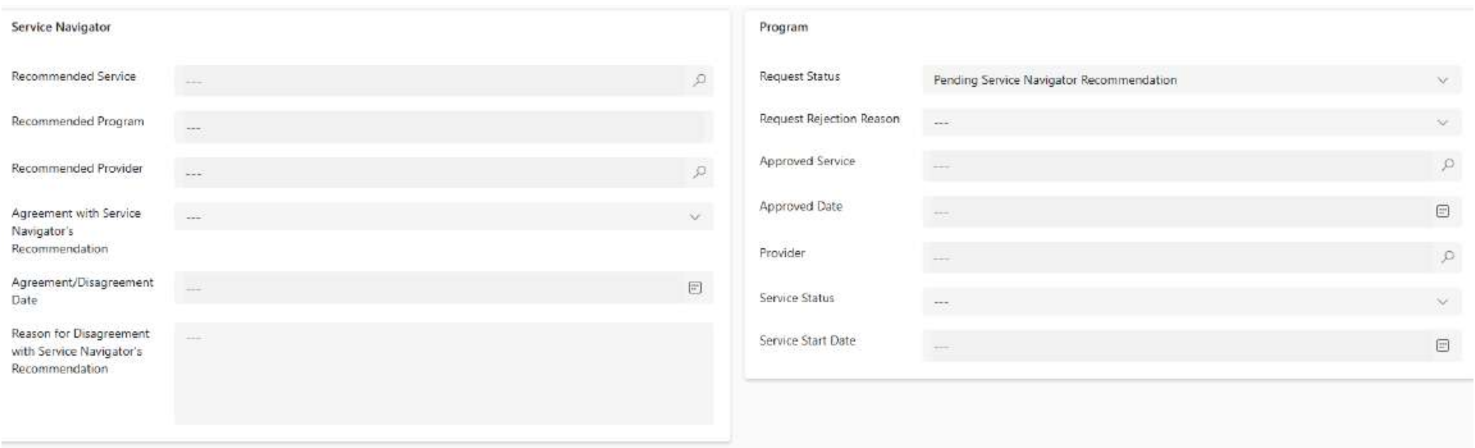
Important Tip:

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

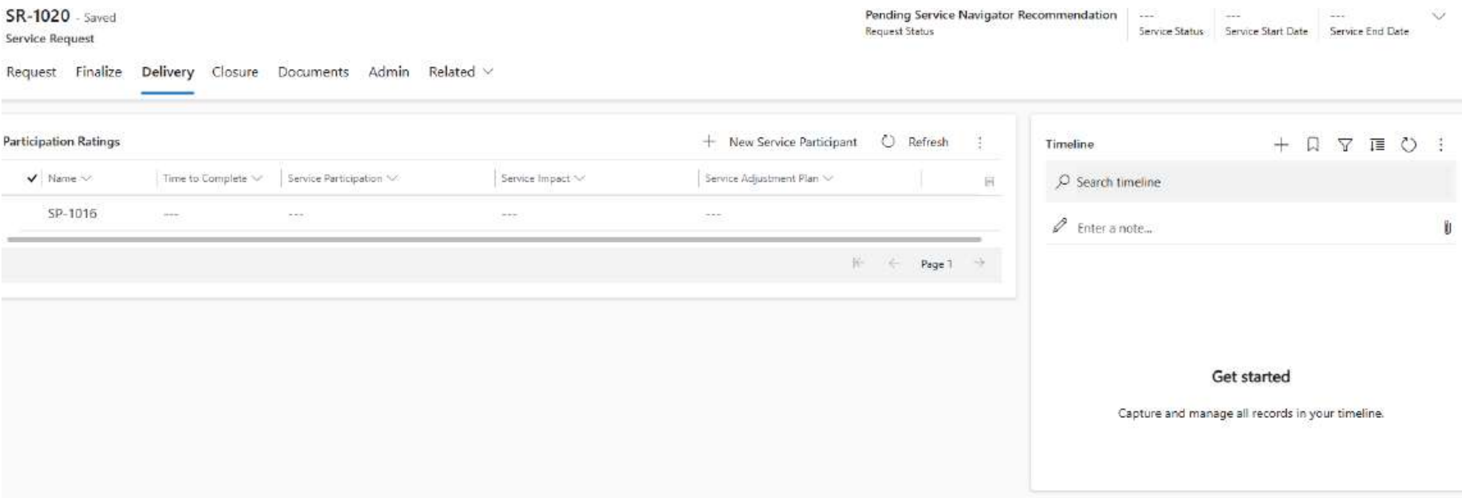
2. Request status can be viewed in the status window



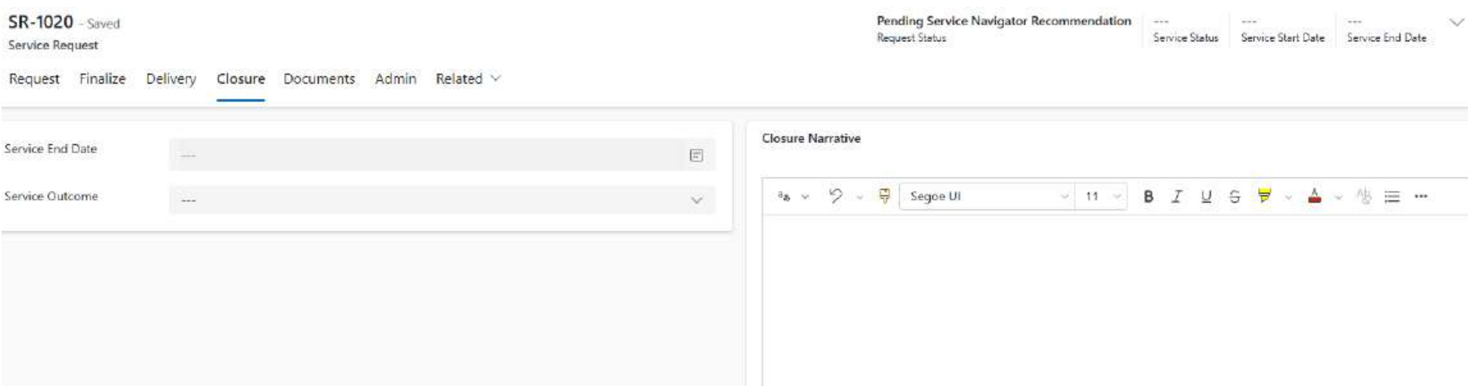
3. Select the Finalize Tab to view Service Navigator recommendations and updates



4. 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.



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



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