
COLLATERAL SCREEN

CREATION DATE: May 4, 2006

How to enter a collateral in FACES.NET

In the following steps, we will enter a contact in FACES.NET detailing a visit made by a social worker of the Jackson family.

Step includes:

Step 1: Navigate to the **Collateral** screen. Place your mouse over the **Case** module at the top of the screen and click on **Collateral**.

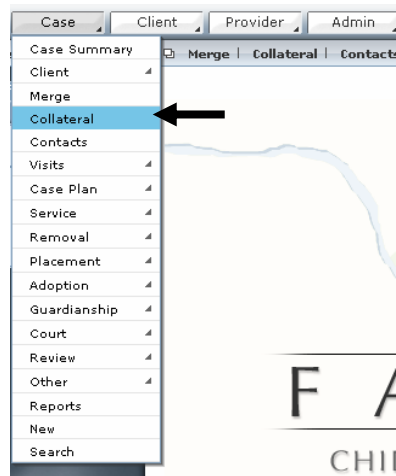


Figure 1

Demographic:

Steps Include:

Step 1: Click on the **Collateral** button on the bread crumbs toolbar.

Step 2: Select **Relationship to Family**.

Step 3: Enter the **Last Name** and other demographic information.

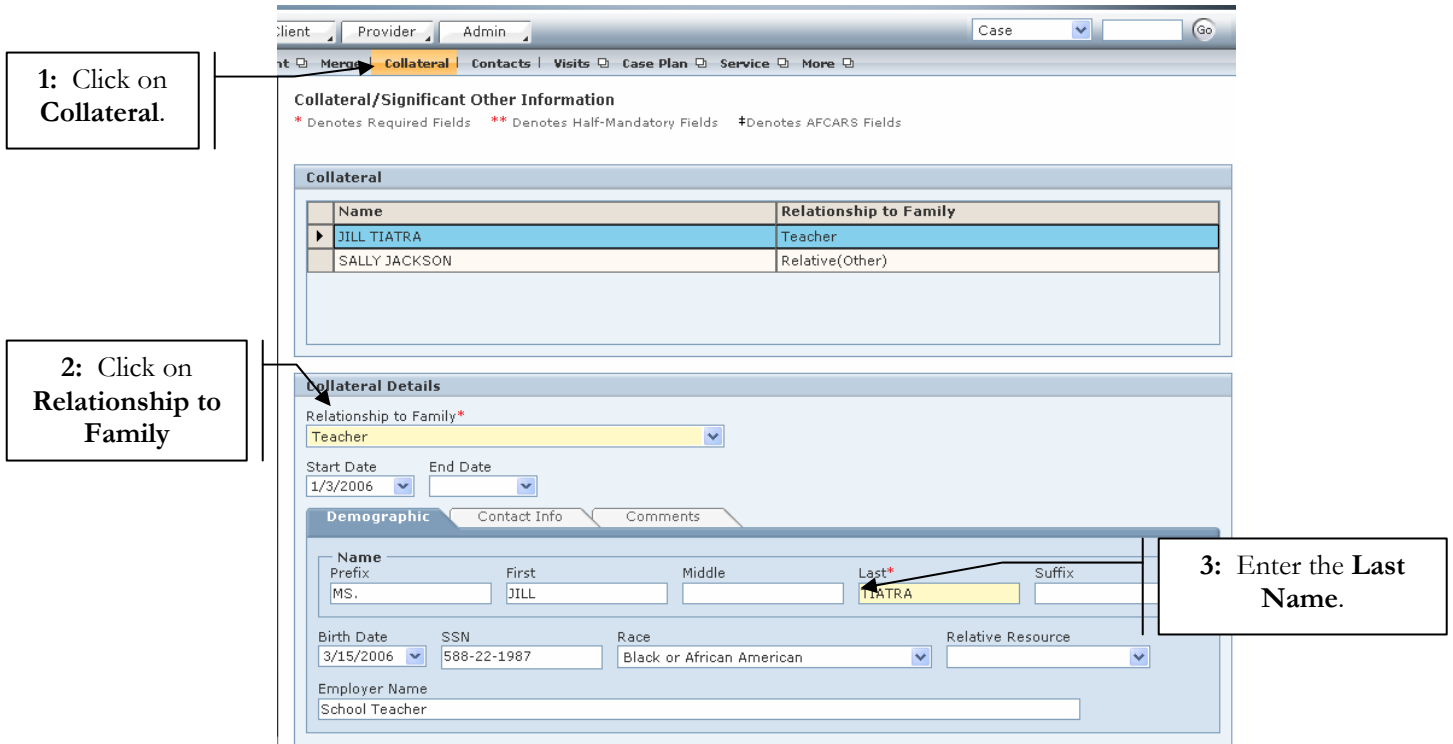


Figure 2

Step 4: Select **Associated Clients** or **Associated Non-Clients**.

Step 5: Click on the **Save** button.

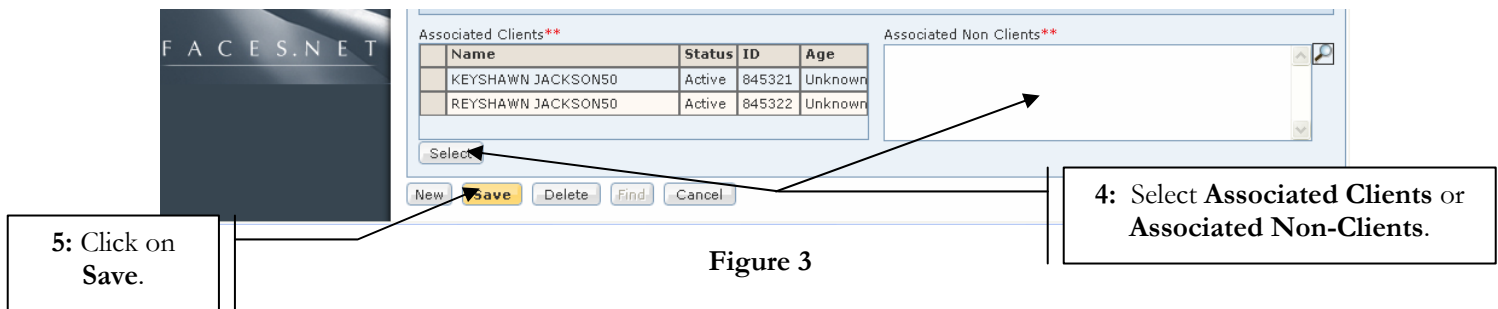


Figure 3

Contacts:

Steps Include:

Step 1: Enter **Home Phone**.

Step 2: Enter **Work Phone**.

Step 3: Click on **Edit** to input the address.

Step 4: Enter **Email Address**.

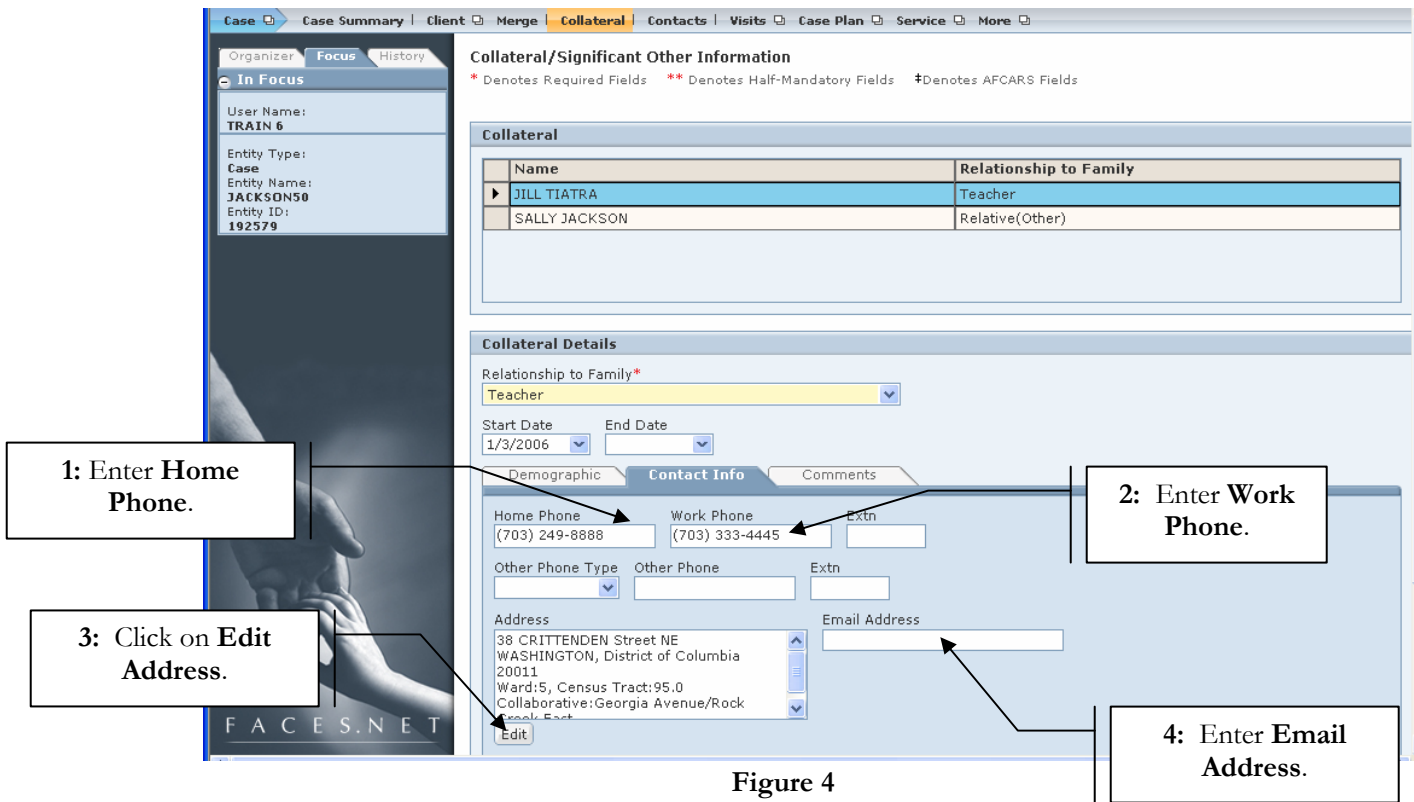


Figure 4



Note

- Upon entering the screen (if no collaterals have been entered on the case) all fields on the screen will be disabled except for the **Relationship to Family** picklist and the **Start Date** and **End Date** fields.
- If you select A.A.G., Attorney, or Guardian Ad Litem from the **Relationship to Family** picklist.
- **Associated Clients** and **Associated Non-Clients** are half-mandatory. You must enter information into one of these fields in order to add the collateral.
- All demographic and contact information will automatically populate to the Collateral screen and is editable. However, changes made will not be reflected when the same individual is selected in a different search.

Steps Include:

Step 1: Enter **Collateral Information**.

Step 2: Enter **Save**.

The screenshot shows the FACES.NET interface for entering collateral information. A callout box labeled "1: Enter Collateral Information." points to the "Collateral Information" text area, which contains the text: "Ms. Tiatra is the homeroom teacher for Keyshawn and Reyshawn Jackson50. She was asked some questions in regard to the boys education by the CFSA investigator...". Another callout box labeled "2: Enter Save." points to the "Save" button in the bottom navigation bar. The interface includes fields for "Teacher" (set to "Teacher"), "Start Date" (1/3/2006), and "End Date". There are tabs for "Demographic", "Contact Info", and "Comments". Below the text area are sections for "Willing to Testify" (checkbox), "Attestable Information", and "Collateral Comments". At the bottom, there are tables for "Associated Clients" and "Associated Non Clients".

| Associated Clients** | | | | |
|----------------------|--------|--------|---------|--|
| Name | Status | ID | Age | |
| KEYSHAWN JACKSON50 | Active | 845321 | Unknown | |
| REYSHAWN JACKSON50 | Active | 845322 | Unknown | |

| Associated Non Clients** | | | | |
|--------------------------|--|--|--|--|
| | | | | |

Figure 5



Notes

- If **A.A.G., Attorney, or Guardian Ad Litem** is the **Relationship to Family**.
- Regardless of the relationship (A.A.G., Attorney, or Guardian Ad Litem) selected from the **Relationship to Family** picklist, the search function will look for **ALL** A.A.G's, Attorneys, or Guardian Ad Litem.

Steps Include:

Step 1: Enter the **Relationship to Family**

1: Enter the Relationship to Family*

| Name | Relationship to Family |
|---------------|------------------------|
| JILL TIATRA | Teacher |
| SALLY JACKSON | Relative(Other) |
| Mary Jones | A.A.G |

Relationship to Family*

A.A.G

A.A.G

Administrative Staff

Attorney

Aunt

Brother

Child Advocate/CASA

Child Welfare Staff

Clergy

Counselor/Therapist

Cousin

Daughter

Day Care Staff

Dentist (Primary)

Detention Center

Emergency Shelter

Ex-Spouse

Family Friend

Father

Foster Parent

Foster Sibling

Godparent

Government Agency

Granddaughter

Grandfather

Grandmother

Grandson

Group Home Placement Manager

Guardian

Guardian Ad Litem

Hospital Ethics Committee Member

Last* Jones

Suffix

Relative Resource

Both

Figure 6