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**.
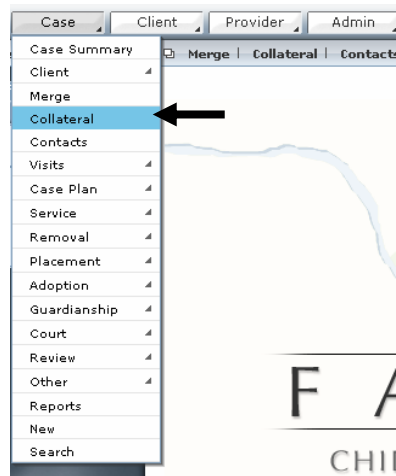

Figure 1

Demographic:

Steps Include:

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

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

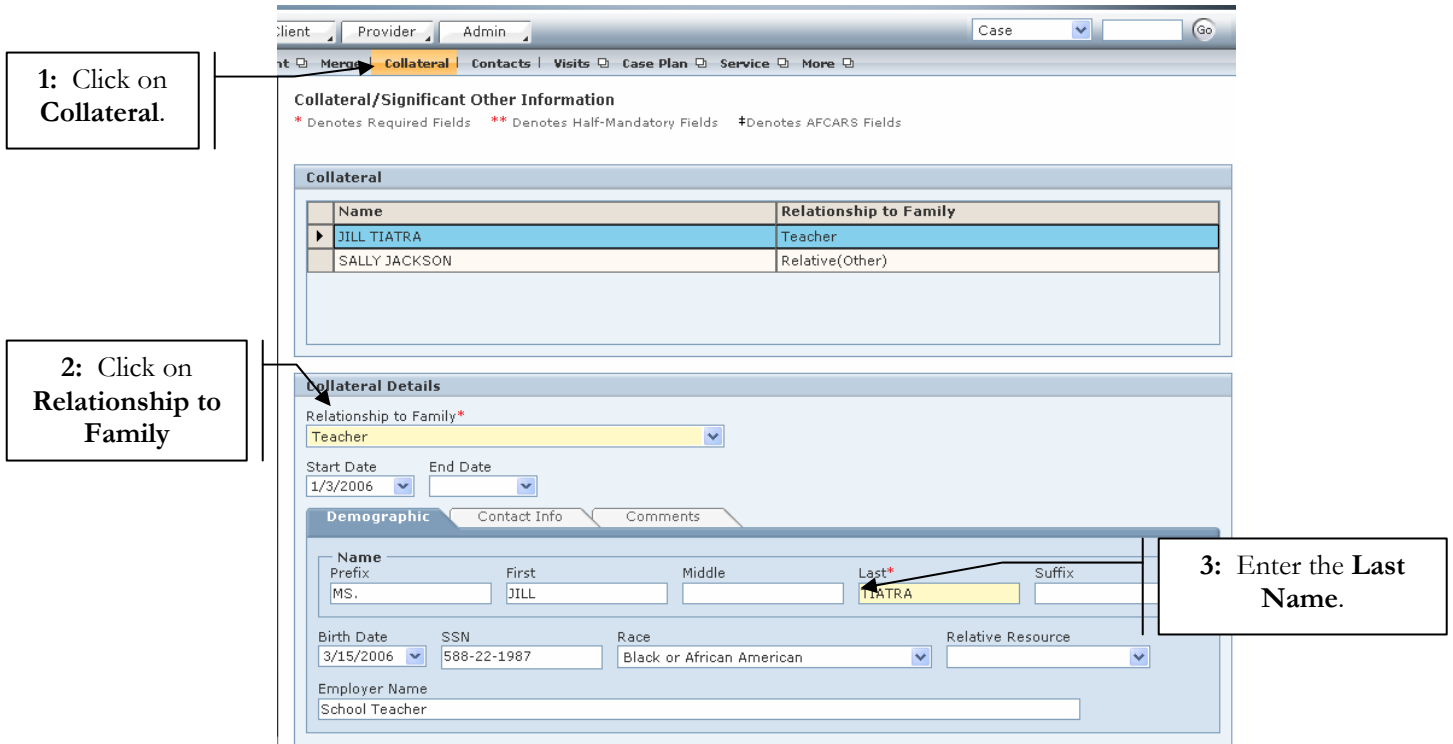**Step 3:** Enter the **Last Name** and other demographic information.

Figure 2

Step 4: Select **Associated Clients** or **Associated Non-Clients**.
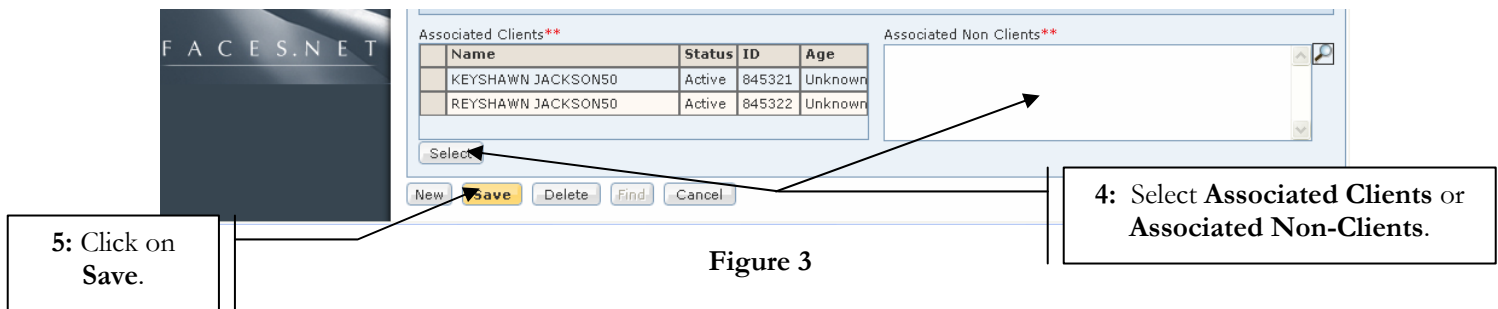
Step 5: Click on the **Save** button.

Figure 3

Contacts:

Steps Include:

Step 1: Enter **Home Phone**.

Step 2: Enter **Work Phone**.

Step 3: Click on **Edit** to input the address.
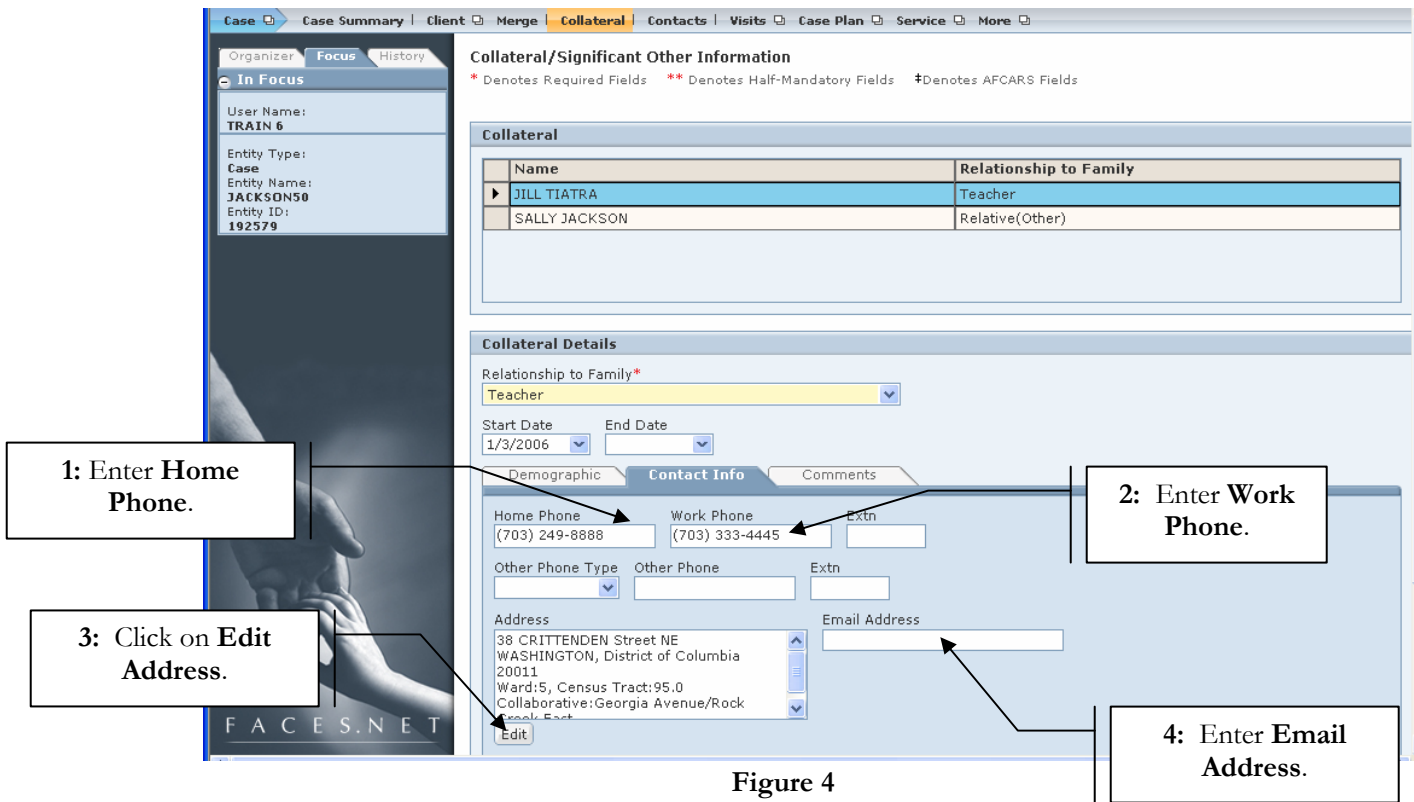
Step 4: Enter **Email Address**.

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**.

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 Litems.

Steps Include:

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

Figure 6