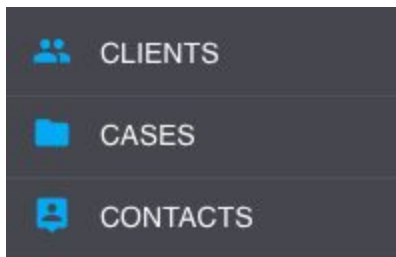


SCENARIO 2: NEW CASE FOR EXISTING CLIENT

Suppose that you didn't enter any case information for Joseph Hamilton right after you added him as a new intake. The next day, you need to add a new case for him. Because you previously added his personal information into Probatum, he is considered an existing client. Follow the steps below and enter a new case for him with the information provided.

1) Navigate to the **Case list**. This can be found on the home screen by clicking "**Cases**" on the side menu.



2) Click the "**Add New**" button in the bottom right corner of the screen.



3) You will be prompted to select the client who corresponds to the case. The client can be identified by their Name or SSN. If the client already exists in Probatum, their name should appear as a match. Type in Joseph's name or SSN and select his name when it appears.

Name: Joseph Lee Hamilton Sr.
SSN: 111-22-3333

NOTE: If there is no match for the name or SSN, you will be prompted to create a new client record. If you are ever unsure whether or not you need to enter a client as a new intake, this is a good way to verify that they do not already exist in the database.

4) Once you have selected the client, click "**Create New Case.**"

5) You will be prompted for several items of case info, but the only items required on this screen are the **Case ID** and the **Case Begin Date**. Beyond these two items, enter all other information that you have available, then click "**Next.**"

Case ID: 16CR000X
Arrested On: Today's Date

Convicted On: Today's Date
Case Began: Today's Date
Case Scheduled Thru: 12/31/2017

6) You will be prompted for court info, but the only item required on this screen is the **Sentence**. Beyond this, enter all other information that you have available, then click "**Next.**"

Court: *Select any Court**
County: Pleasant
Judge: *Select any Judge**
Sentence: *Select any Sentence**

7) Enter the **case status**, then click **Next**.

Status: *Select any Status**

8) Enter the **case type**, then click **Next**.

Type: *Select any Case Type**

9) Enter the **Staff** and **Staff's Role**, then click **Next**.

Staff: *Select any Staff*
Role: *Select any Staff Role**

10) Once you have reached the last new case entry form, you will be prompted to add an optional **Case Note †**. Any additional case information that you would like to be visible from the case overview can be added here. Click "**Next.**"

Case Note: Joseph unable to make 10pm curfew on Tuesdays due to current work schedule. Verified by employer.

11) When you are done with the new case entry, click "**Save**".

12) The final screen should verify that all the required case info was saved successfully. Click "**Exit to Case.**"

13) The new case will open. You may add any information that has not yet been recorded or edit any existing information. The case will now appear in both the organization-wide case list, as well as the case list on the client's profile.

† *It is important to make a distinction between the **Case Note** and staff notes that can be added in the client log. The log displays a feed of staff notes logged during the duration of the client's supervision, ordered by the date they were added. The Case Note, on the other hand, is a single note that appears on the Case Overview, much like a memo. The Case Note can be edited or updated at any time, but no record of note history will be kept.*

* *These items will vary from agency to agency. These select fields are populated with customizable options that can be added or edited in the Organization Management portion of Probatum.*