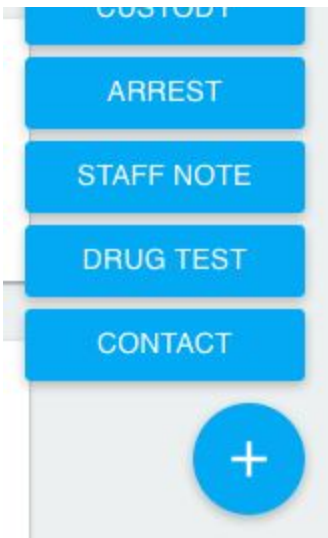



### SCENARIO 3: SCHEDULING / RECORDING CLIENT CONTACTS

You want to make an appointment for Joseph Hamilton to come in for an office visit tomorrow to discuss his terms of supervision for Case 16CR000X. Follow the steps below to schedule a client contact.

#### SCHEDULING A CONTACT

- 1) If you do not already have Joseph's client profile open, search for him in the Client List and open his profile.
- 2) Click "**Log**" on the side menu.
- 3) **Contacts** can be added one of the following two ways (this is true for all types of Log records):

A.	B.
<ol style="list-style-type: none"><li>1. From the main case log list, click the "<b>Add New</b>" button.</li><li>2. Select "<b>Contact</b>" and a form for a contact will open.</li></ol> 	<ol style="list-style-type: none"><li>1. From the main log list, click the button labeled "<b>All Log Records</b>" and select "<b>Contacts</b>" from the list.</li><li>2. Click the "<b>Add New</b>" button and a form for a contact will open</li></ol> 

4) After accessing the form for the contact (via either method in the previous step), you can now schedule a contact. Enter the date and time that he is *scheduled* to come in to the office.

**Date:** Tomorrow's Date  
**Time:** 1:00 PM

5) Enter the **Contact Type**. The **Contact With** field will default to your name, but you can edit that if you wish.

**Contact Type:** Office Visit\*

6) If you'd like, you can add a **note** with the contact.

**Note:** Discuss Terms of Supervision

7) You'll notice the final field on the contact form is labeled **Tagged Cases**. Since this contact is to discuss his terms of supervision and is directly related to case 16CR000X, you'll want to tag that case. Simply begin typing the Case ID into the text field and select it when it appears.

16CR0001  
16CR0231  
16CR0314 X

16CR0314 X

16CR|

**Tagged Case:** 16CR000X

8) When you are finished, click the checkmark icon to **save**.



## RECORDING AN ACTUAL CONTACT

Just after scheduling him for an office visit tomorrow, Joseph calls you on the phone to tell you that he was hired at a new job. You want to record this in Probatum as a contact that has *actually* occurred.

1) Following steps 1-3 above to **add a new contact**.

2) Enter the **Date** and **Time** the contact *actually* occurred. The current time should already be displaying by default. Because you recorded the contact right after it occurred, you do not need to edit this.

**Date:** Today's date  
**Time:** Current time

3) Enter the **Contact Type**. Again, the **Contact With** field will default to your name. If he had contact with another staff member, you would select their name from the drop down list.

**Contact Type:** Telephone\*

4) Add a **note** with the contact adding any details that you want to record.

**Note:** Joseph informed me that he was hired as a shift manager at the Corner Market.

5) This time, we won't add any **tagged cases**. At this time, Joseph only has one case record in Probatum. However, if he did have more than one case, his employment status would affect all his cases, so this contact would not necessarily need to be related to a specific case.

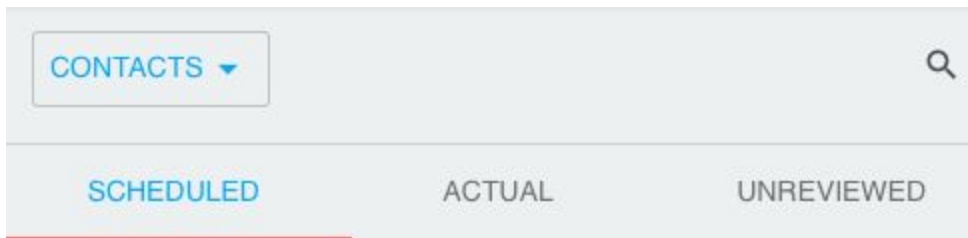
6) When you are finished, click the checkmark icon to **save**.





7) Notice that the first contact is displaying in the *Scheduled* section of the contacts, while the second contact is displaying as an *Actual* contact.

## COMPLETING A SCHEDULED CONTACT

A day later, Joseph comes into your office for his scheduled meeting with you. You want to record that he did, in fact, show up for his scheduled meeting, as well as record notes about the meeting. Instead of creating a new contact record, you'll update the scheduled contact and complete it.



- 1) From Joseph's contact list, locate the **scheduled contact record**.
- 2) Click anywhere on the contact record to open it.
- 3) The contact detail view will open. Click the **edit icon** in the toolbar. 
- 4) Notice that the **date** field that once displayed the scheduled date/time has updated to the current date and time. Click on the date to edit it if necessary.
- 5) Update the **notes** field with information about your meeting with Joseph.
- 6) Click the checkmark icon to **save**. 
- 7) This will now appear as an *Actual* contact in his contact list.

\* *This item will vary from agency to agency. This select field is populated with customizable options that can be added or edited in the Organization Management portion of Probatum.*

*To learn more about managing Pending, Overdue, and Unreviewed Contacts from the home screen, view the section entitled "**Managing Pending and Overdue Contacts from the Home Screen**" under the "Managing Contacts" section of the Probatum documentation.*