

## QUICK START GUIDE FOR RECOEDING PERSON CHARACTERISTICS RECORDS

### RECORDING PERSON CHARACTERISTICS RECORDS

#### Navigate to the case

1. Click the View Case Information link (There is more than one way to access person characteristics. For this document we will be accessing the person's characteristics tab through the case record)
2. Click the Members tab
3. Click the Name hyperlink of the person you wish to add characteristics records for
4. Click the Characteristics tab
5. Select the appropriate Characteristics Type from the dropdown and click the Add Characteristics button  
**(Characteristics added to document a parent or older child's substance abuse issues are added in the Mental Health/Substance Abuse Characteristics Group. Characteristics added to document an infant's prenatal exposure are added in the Prenatal/Birth Characteristics Group)**
6. The Characteristics Details screen appears for the selected characteristics type. Select the applicable characteristics in the available characteristics list and click the Add button. Repeat this step for each characteristic you wish to add to the Selected Characteristics. **(Please Note: Each Substance Abuse characteristics for a parent or older child has an Involved/Abuse characteristic and an Addiction/Dependence characteristic)**
7. On this same screen, in the Method field you will need to click the appropriate radio button. (Clinically Diagnosed characteristics include any medical, physical, or mental health condition which has been diagnosed by a Qualified Professional. Documentation of the Clinically Diagnosed condition must be maintained in the case record. Otherwise, the condition may be documented as Self Reported or Observed.)
8. **If you selected the Self Reported, Observed, or Clinically Diagnosed radio button additional fields display. (The names of the additional fields change based on the radio button selected.)** Complete the required information.
9. Enter narrative in the Additional Information text box if applicable. (This is optional.) Click the Save button.
10. The Documented Characteristics are displayed