



synergy

SYNERGY
INTRODUCTION:



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Introduction:

What is Synergy?

Synergy is an IT platform that hosts multiple DHS administered applications. Synergy applications cover a wide range of services from responding to referrals to complete caseload management and documentation.

How will I use Synergy?

There are multiple internal DHS program offices and DHS provider agencies using Synergy based applications. Application usage can run the gamut from simply viewing and responding to online postings to documenting case notes, recording client data, storing case documents, completing assessments and plans, and managing entire caseloads. Each application is unique in its specific functions. This guide will walk through elements that are common to the Synergy applications.



Navigation & Common Screen Elements:

Logging into Synergy

Allegheny County

synergy

User Id

Password

Log In

[Password Self-Service](#)

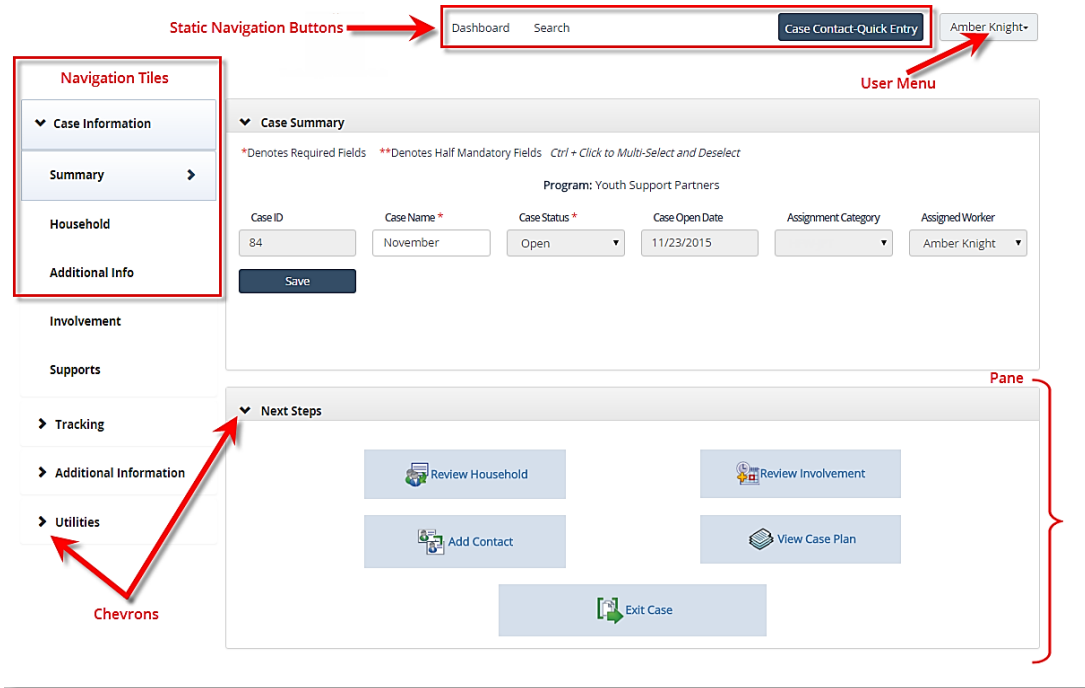
***Disclaimer:** You are about to enter the private network of Allegheny County. All information on this site is confidential. Access is limited to persons with user identification assigned by Allegheny County. Unauthorized access to this system or unauthorized use of the information contained therein is a violation of County, State and Federal Laws, and will be punished to the full extent of the law.*

- Navigate to the Synergy URL using Microsoft Internet Explorer or Google Chrome . (Synergy is **NOT** compatible with Microsoft Edge browser.)

<https://synergy.county.allegheny.pa.us/Synergy>

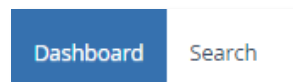
- ❖ The **Password Self-Service** link will take you to Portal Guard to reset your password if it has expired or if you have forgotten it.
- Log in using your Login ID and Password. Your user credentials are assigned by the Department of Human Services Service Desk and will start with a T, K, or X.
- Click
- ❖ You will then be taken to the Synergy Splash Page. Here you will find links to all of the Synergy Applications that you have been granted access to with your Login ID.

Navigation



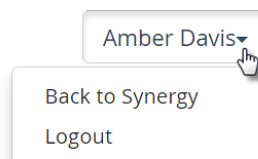
Static Navigation Buttons

- These Navigation Buttons will always be at the top of the screen and can be accessed from any screen in Synergy. Depending on your level of access you may see more or less options here.
- These buttons will turn blue to indicate what screen you are on:



User Menu

- This will display the name of the user who is logged in.
- Click on the down arrow [▼] to the right of your name to open the User Menu:



- ❖ Select "Back to Synergy" to return to the Synergy Splash Page and navigate to other Synergy applications that you have been granted access to.



Chevrons

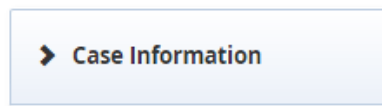
- Chevrons can be used to open and close Navigation Tiles and Panes.

❖ Closed Chevron: ➤

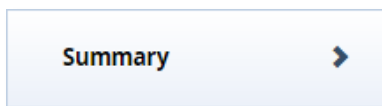
❖ Open Chevron: ▼

Navigation Tiles

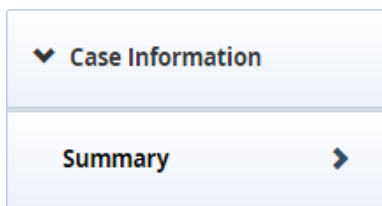
- Click on a Navigation Tile to open that menu and access the pages within it.
- If the closed chevron [➤] is to the left of a tile, this indicates that clicking on this tile will reveal more sub-tiles below it.



- If the closed chevron [▼] is to the right of the tile, this indicates that there are no more tiles to access using this menu.



- Navigation tiles show the navigation path to the current screen. For example, the tiles here indicate that you have accessed the *Summary* screen within *Case Information*:



Panes

- Panes are smaller windows within the screen being viewed.
- Panes can be opened or closed using chevrons.

➤ Case Summary

▼ Case Summary


*Denotes Required Fields **Denotes Half Mandatory Fields Ctrl + Click to Multi-Select and Deselect

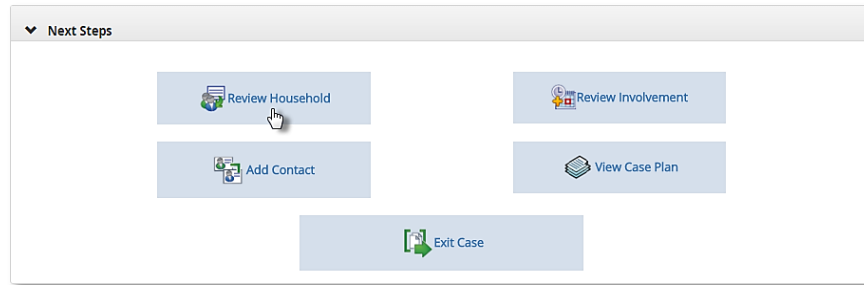
Program: Youth Support Partners


Case ID	Case Name *	Case Status *	Case Open Date	Assignment Category	Assigned Worker
84	November	Open ▼	11/23/2015	HFW-JPT ▼	Amber Knight ▼

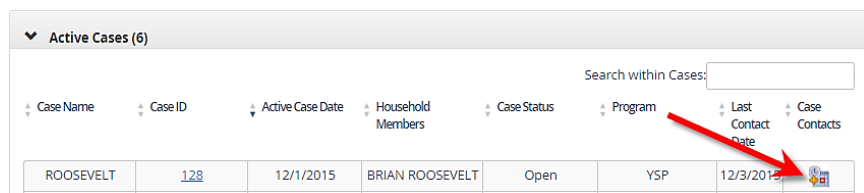
Save

Shortcuts and Links

- Throughout the applications there will be shortcuts and links that will allow you to navigate through the system. Your cursor will turn into a hand [] when hovering over a link or shortcut.
- Some examples include:
 - ❖ Tiles in the *Next Steps* Pane that will link directly to various pages within the case.



- ❖ The Contacts Icon [] in the *Active Cases* Pane which navigates directly to the Contacts Page in the Case.



Referral/Case Summary Pane

- The top Pane in each screen will be a Summary Pane
- This Pane contains basic information about the Referral or Case currently being viewed/worked in.

Referral Summary

*Denotes Required Fields **Denotes Half Mandatory Fields Ctrl + Click to Multi-Select and Deselect

Referral Date

Referral Status *

Assigned Worker

Referral ID

12/17/2015

In Progress

Marieke Johnson

1253

Case Summary

*Denotes Required Fields **Denotes Half Mandatory Fields Ctrl + Click to Multi-Select and Deselect

Program: Youth Support Partners

Case ID

Case Name *

Case Status *

Case Open Date

Assignment Category

Assigned Worker

172

EISENHOWER

Open

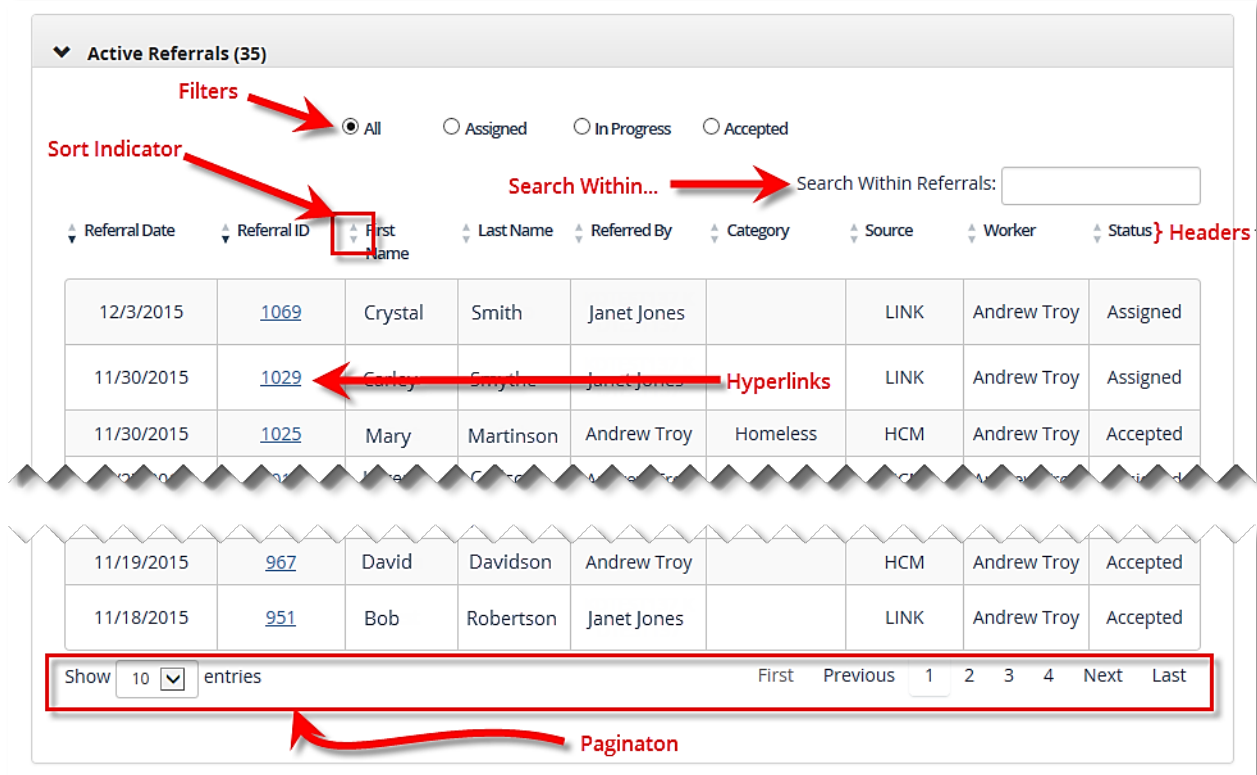
12/17/2015

HFW-JPT

Marieke Johns

Save

Grids & Lists



Active Referrals (35)

Filters: ☒ All ☐ Assigned ☐ In Progress ☐ Accepted

Sort Indicator: Referral Date Referral ID First Name Last Name Referred By Category Source Worker Status

Search Within... Search Within Referrals:

Referral Date	Referral ID	First Name	Last Name	Referred By	Category	Source	Worker	Status
12/3/2015	1069	Crystal	Smith	Janet Jones		LINK	Andrew Troy	Assigned
11/30/2015	1029	Carol	Smythe	Janet Jones		LINK	Andrew Troy	Assigned
11/30/2015	1025	Mary	Martinson	Andrew Troy	Homeless	HCM	Andrew Troy	Accepted
11/19/2015	967	David	Davidson	Andrew Troy		HCM	Andrew Troy	Accepted
11/18/2015	951	Bob	Robertson	Janet Jones		LINK	Andrew Troy	Accepted

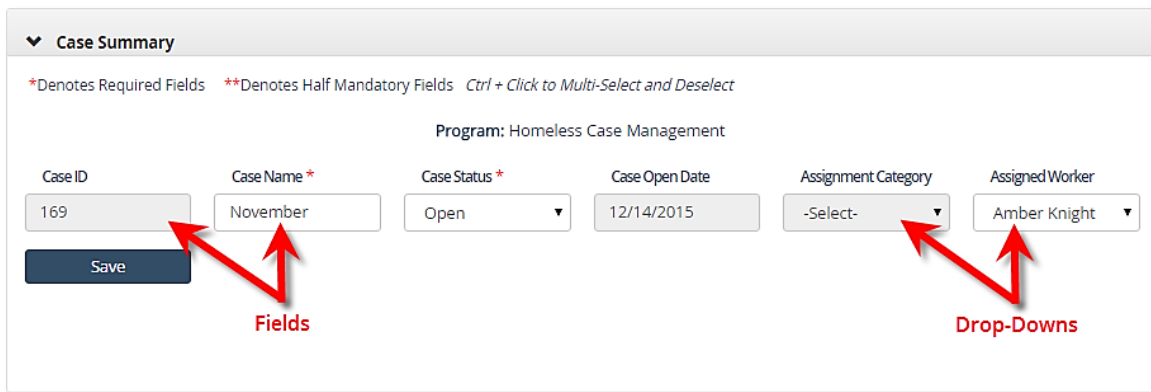
Hyperlinks: [1069](#), [1029](#), [1025](#), [967](#), [951](#)

Pagination: Show 10 entries First Previous 1 2 3 4 Next Last

- **Filters:** Grids with Filter radio buttons can be narrowed down to the filtered categories.
- **Headers:** Identify what type of information can be found in the grid columns.
- **Search Within...** : These search fields can filter the grid down to any grid item containing all or part of a word, date, or number.
 - ❖ The filter will only apply to text and numbers that are contained within the grid itself. For example: Typing "LINK" will filter the list to all Referrals with a source of *LINK*.
 - ❖ This search also accepts partial entries. For example typing "10" will filter this list to include Referrals *1069*, *1029*, and *1025*. Typing "And" will bring up all Referrals assigned to *Andrew Troy* or Referred By *Andrew Troy*.
 - ❖ To clear the search results, click the **X** that appears to the right inside the search field or delete the search terms.
- **Sort Indicator:** This indicates what direction the Header in the grid is sorted in to. To sort the list on a specific Header click on the Header. The sort indicator will point upward for ascending order and downward for descending order.
- **Hyperlinks:** Hyperlinks within the grid will open the item in the grid. Clicking on [1029](#) will open Referral Number 1029.
- **Pagination:** Longer lists will be separated into pages. These pages can be navigated through using the **First Previous 1 2 3 4 Next Last** links at the bottom-right of the grid. To the bottom-left of the grid is a drop-down option that allows you to change the number of grid entries displayed per page.

Common Screen Elements

Fields & Drop-downs



Case Summary

*Denotes Required Fields **Denotes Half Mandatory Fields Ctrl + Click to Multi-Select and Deselect

Program: Homeless Case Management


Case ID: 169 Case Name *: November Case Status *: Open Case Open Date: 12/14/2015 Assignment Category: -Select- Assigned Worker: Amber Knight

Save


Fields (pointing to Case Name and Assigned Worker)

Drop-Downs (pointing to Case Status and Assignment Category)

Fields

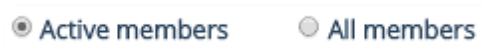
- A field is an area where data has been or can be entered.
- White fields can be edited. (Example: Case Name)
- Greyed out fields cannot be edited. (Example: Case ID)
 - ❖ If you move your mouse over a greyed out field the read-only symbol [] will appear.

Drop-downs

- A drop down is a list of options that items can be selected from.
- White drop-downs can be edited. (Example: Assigned Worker)
- Greyed out drop-downs cannot be edited. (Example: Assignment Category)
 - ❖ If you move your mouse over a greyed out drop-down the read-only symbol [] will appear.

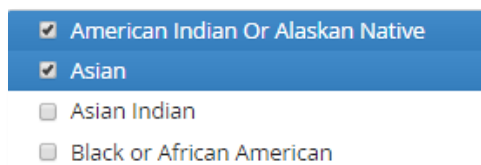
Radio Buttons & Checkboxes

- Radio buttons and checkboxes can be selected by clicking in the circle or box.
 - ❖ Radio Buttons are round and signal that only one item can be selected.



☒ Active members ☐ All members

- ❖ Checkboxes are square and can signal that multiple items may be selected.




☒ American Indian Or Alaskan Native

☒ Asian


☐ Asian Indian

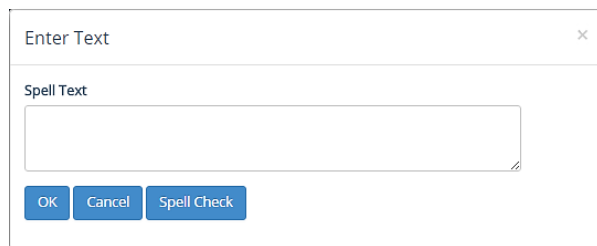
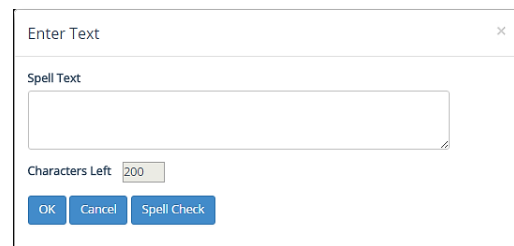
☐ Black or African American

Narrative Text Fields & Zoom-Boxes

- Narrative text fields allow a larger amount of data to be entered. In Google Chrome these fields can be resized by clicking and dragging the bottom-right corner of the field . This changes the shape and size of the field but does not change the total amount of text that can be entered.

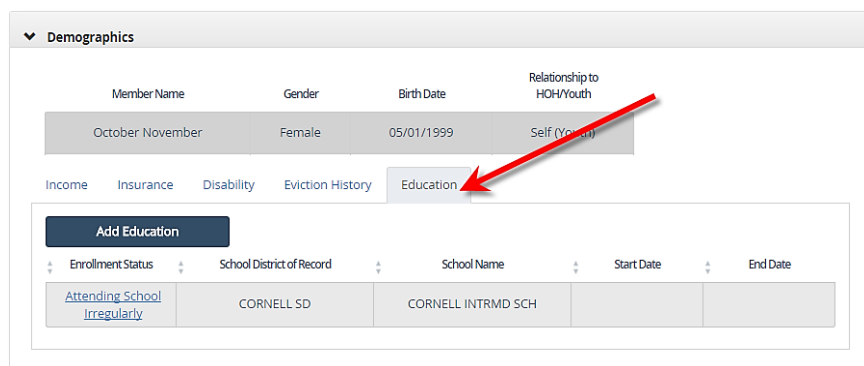


- To open the zoom-box click on the Magnifying Glass icon [] above the top-right corner of the Narrative field.
 - ❖ The narrative field's text can be edited within the field itself or from within the zoom-box.
 - ❖ The zoom-box contains a spell check function as well.
 - ❖ Some zoom-boxes will also contain a counter with the number of characters left for the narrative text field.

Tabs

- Tabs indicate that there are multiple screen layers on top of each other.
 - ❖ These are accessed by clicking on the desired tab to bring information to the top of the stack.
- The tab selected and currently displayed is highlighted in grey.





Buttons

- Buttons can indicate actions that can be taken, for example:

Save

- Buttons can open pop-up windows, for example:

Create Support

- Dark blue buttons are active and clickable. Light blue buttons are inactive and cannot be clicked, for example:

Change Log

Mandatory Fields

- Mandatory fields are marked with a red asterisk *.
- Mandatory fields must be filled out in order to save a screen or move on to the next screen.

Contact Status *

-Select- ▼

Half-Mandatory Fields

- Half-Mandatory fields are marked with double red asterisks ** and are always two or more fields.
- You will not be able to save the screen or move on to the next screen without at least one of the fields being completed.

Example: You can select:

One or more *Clients*

OR

One or more *Supports*

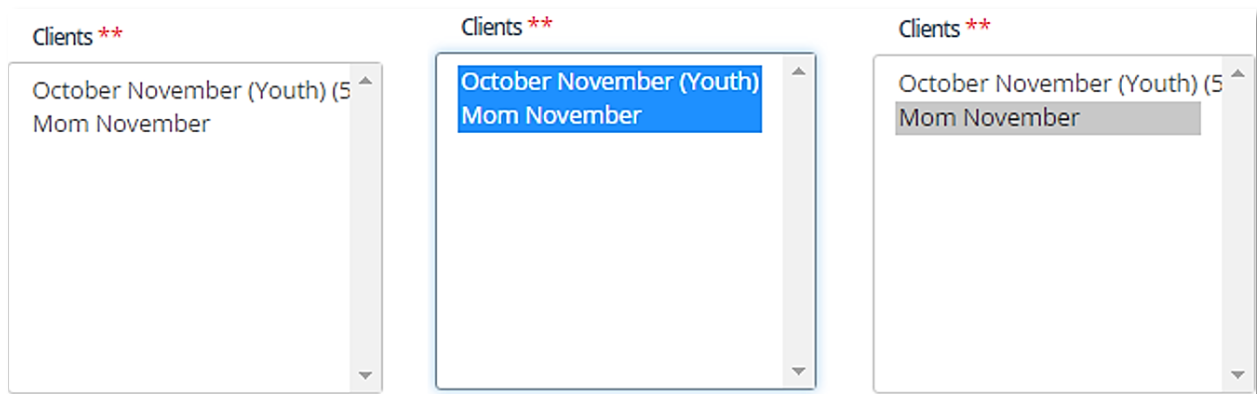
OR

One or more *Clients* AND one or more *Supports*.

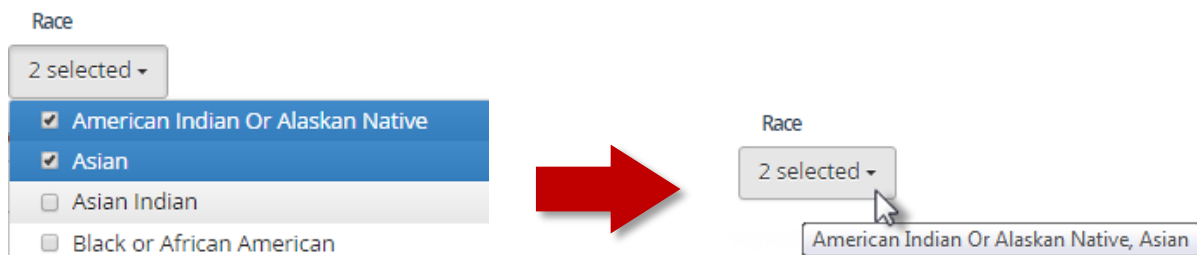
Clients **	Supports **
October November (Youth) (5) Mom November	Minimally Involved 3rd Party

MultiSelect Boxes & Drop-Downs

- Multiple items can be selected from both MultiSelect boxes and MultiSelect drop downs.
- To select more than one item in a MultiSelect box, hold down the **Ctrl** key on your keyboard while clicking on the items. Selected items will be highlighted in blue or grey after they have been clicked.
- To de-select items hold down the **Ctrl** key on your keyboard and click on the item again. The de-selected item will then no longer be highlighted.



- MultiSelect drop-downs have check boxes next to each item in the drop down. Select the desired items by clicking on the check boxes to the left of the item.
- If more than one item is selected, the selected items can be read without opening the drop-down by hovering your mouse over the drop down.



Status Indicators

- Many Synergy Applications use the following indicators next to fields and Navigation Tiles.

❖ The field/screen is Mandatory but has not been completed:



❖ The field/screen is Optional but has not been completed/edited:



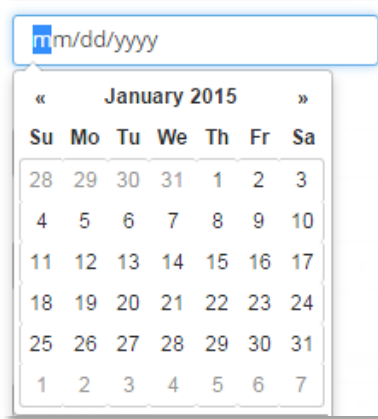
❖ The field/screen has been completed/edited:



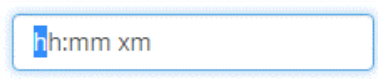


Date & Time Fields

- You can enter a date by typing the date into the field using the *mm/dd/yyyy* format or by clicking on the date field and clicking the date from the calendar that opens up.



- Use the << >> arrows to either side of the month change the month in the calendar.
- Enter a time by clicking in the field and typing using the *hh:mm* format. At the end of the time field you will see *xm*. Type "a" or "p" to change this to am or pm.



Historical Information

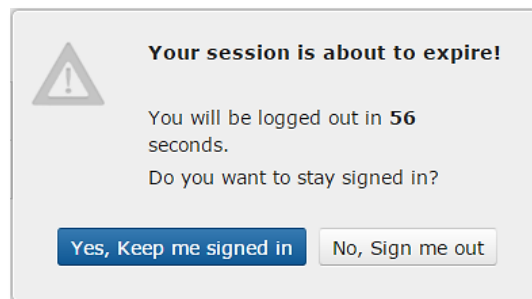
- Some Synergy Applications use the History Icon [🕒] to display the history of a specific field such as *Referral Status* or *Assignments*. Clicking on this icon will open a *History* pop-up with this information in a grid.

The screenshot shows a 'Referral Summary - October November' form with fields for Referral Date, Referral ID, Referral Status, Referral Category, Transition Planner, Educational Liaison, 412 Youth Zone, Owner of Plan, Enrollment Status, School Name, School Grade, Placement Agency, and Placement Facility. A hand icon points to the 'Referral Status' field, which has a history icon (🕒) next to it. Below the form is a 'Referral Status History' pop-up window showing a table with columns: Referral Status, Closure Reason, Start Date, End Date, and Modified By. The table is currently empty. A 'Cancel' button is at the bottom right of the pop-up.

Referral Status	Closure Reason	Start Date	End Date	Modified By
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Timing Out

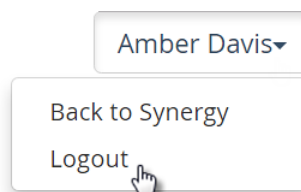
- After 50 minutes of inactivity in the application, the screen will time out.
- If the session has timed out, any unsaved information will be lost.
- Any action that causes the screen to refresh (such as saving or navigating to a different screen or tab) will reset the time-out clock.
- If you are close to timing out of the application, you will receive a pop-up message warning you that your session is about to expire.



- While Synergy has a time out length of 50 minutes, Internet Explorer and Chrome may close your session sooner depending on the browser version you are using.

Logging out of Synergy

- To log out, click the User Menu in the upper-right corner of the screen and select "Logout".



Synergy Assistance

- For assistance, please contact your Synergy Specialist first.
- Contacting the Allegheny County Service Desk:
 - ❖ By email: ServiceDesk@AlleghenyCounty.US
 - ❖ By phone: 412-350-HELP (4 3 5 7), select option 2 for DHS.
- To access iService go to: <https://ServiceDesk.AlleghenyCounty.US>
- This and other Job Aids can be found at:
<http://s3.amazonaws.com/dhs-application-support/index.htm>