



## Case: Assistance Summary - DHSSSP Job Aid

The **Assistance Summary** screen allows users to document assistance rendered to clients including any CSBG funded associated costs that are specifically applicable to the Client Assistance Fund, Emergency/Basic Needs Fund, Transportation Assistance, and/or Career Development. Leveraged funding assistance can be documented in the *Leveraged Funding Specific* Assistance Domain. Leveraged Funding refers to any funding that does not come from CSBG specific funding but is still paid out through your agency.

### Assistance Summary

▼ Assistance Summary

☒ Current Calendar Year

☐ Previous Years

Assistance ID	Case Type	Assistance Domain	Service	Start Date	End Date	Cost	Updated By
1	Career Development	Career Development	Career Preparation and Exploration	6/1/2021		0.00	
2	Career Development	Career Development	Credentials/Certification Status	6/1/2021		175.23	

Show 

10

 entries

FirstPrevious1NextLast

Assistance Domain \*

Service \*

Other

Start Date \*

End Date

-Select-

-Select-

Amount Paid For Assistance (If none, enter zero) \$ \*

Total Amount Paid This Year \$

Save

New

### Navigation

- From the **Dashboard**: Locate the desired Case and click on the *Case ID* to bring the Case into focus.
  - Click on the **Tracking** tile. Then click on the **Assistance Summary** tile.



## Assistance Summary screen

1. Assistance Summary pane:

The screenshot shows the 'Assistance Summary' form. A red box labeled 'A' highlights the 'Assistance Domain \*', 'Service \*', and 'Other' fields. 'Assistance Domain' and 'Service' are dropdown menus, while 'Other' is a text input field. Callout 'B' points to the 'Start Date \*' field, and 'C' points to the 'End Date' field. Callout 'D' points to the 'Amount Paid For Assistance (If none, enter zero) \$ \*' field. Callout 'E' points to the 'Total Amount Paid This Year \$' field, which includes a calculator icon. At the bottom are 'Save' and 'New' buttons.

- a. *Assistance Domain* and *Service*: The *Assistance Domain* and *Service* drop-downs are connected. Selecting an *Assistance Domain* will filter the *Service* options down to only those associated with the selected *Assistance Domain*.
  - i. If the *Service* selected is "Other" the *Other* field will open and the specific service can be entered there.
- b. *Start Date*: Enter the date that the Assistance was provided/began.
- c. *End Date*: If applicable, enter the date the Assistance ended.
- d. *Amount Paid for Assistance (If none, enter zero)*: Enter the amount paid by your agency for this assistance. If your agency does not have any direct expense associated with this assistance, enter zero (0).


**IMPORTANT NOTE:** Only CSBG funded costs specifically associated with the following funding streams should be entered.



Client Assistance Fund  
Emergency/Basic Needs Fund  
Transportation Assistance  
Career Development

If funds are paid out through your agency but do not come from the above CSBG specific funding, then use the **Leveraged Funding Specific** Assistance Domain to document that assistance.

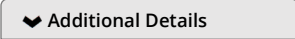


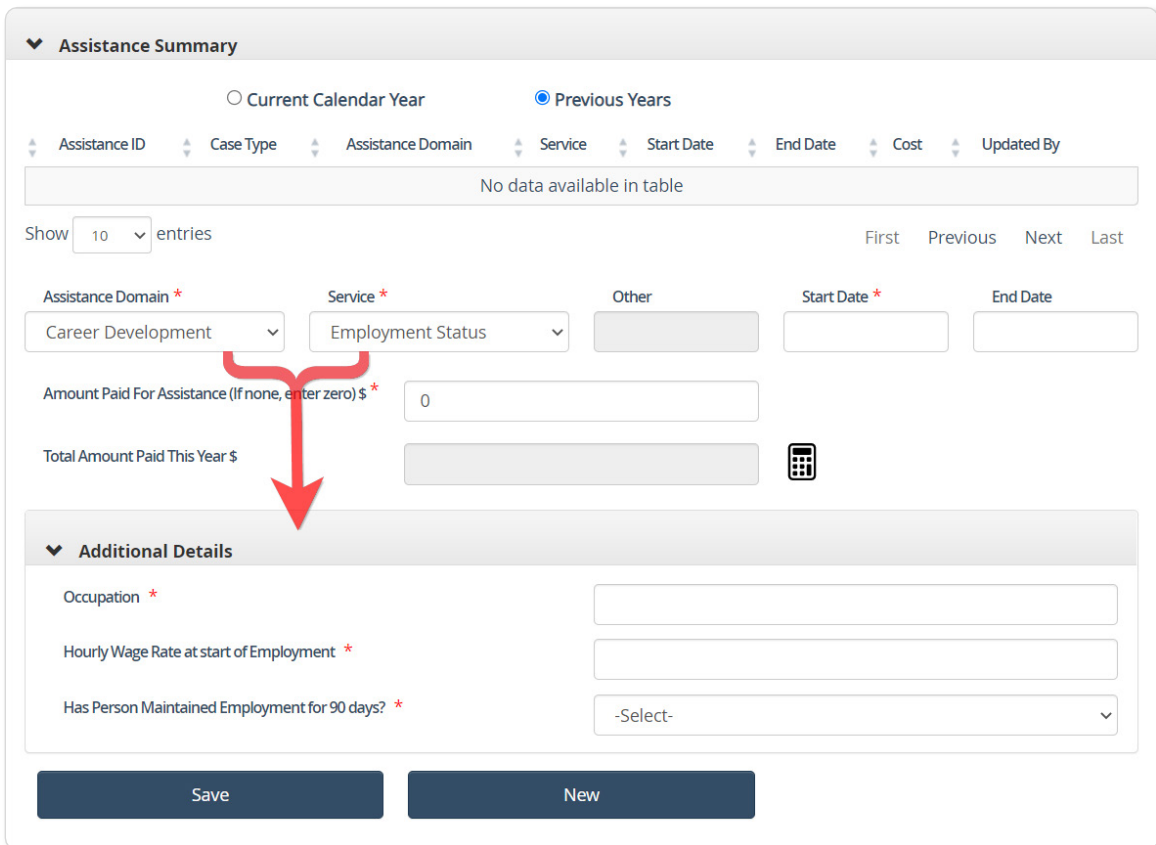
- e. *Total Amount Paid This Year*: This is a read-only field that will automatically calculate the amount paid for the current calendar year based on the *Start Date* entered.

To preview the total before saving, click on the calculator icon .

- f. Click  to save the *Assistance Summary* record.  
Click  to create a new *Assistance Summary* record.

**NOTE:** *Assistance Domain* and *Service* selections cannot be edited once they have been saved. The *Start Date*, *End Date*, and *Amount Paid For Assistance* can be edited after the initial save.

2.  pane: Some selections may include additional details. If the Assistance Domain/Service combination selected includes additional details the *Additional Details* pane will be displayed and must be completed to save the record.



The screenshot shows the "Assistance Summary" form. At the top, there are radio buttons for "Current Calendar Year" and "Previous Years". Below this is a table with columns: Assistance ID, Case Type, Assistance Domain, Service, Start Date, End Date, Cost, and Updated By. The table is empty, showing "No data available in table". Below the table, there are dropdown menus for "Assistance Domain" (selected: Career Development) and "Service" (selected: Employment Status). There are also input fields for "Start Date" and "End Date". Below these, there is a field for "Amount Paid For Assistance (If none, enter zero) \$" with the value "0". There is a "Total Amount Paid This Year \$" field with a calculator icon next to it. A red arrow points from the "Service" dropdown to the "Additional Details" pane. The "Additional Details" pane contains three fields: "Occupation \*" (input field), "Hourly Wage Rate at start of Employment \*" (input field), and "Has Person Maintained Employment for 90 days? \*" (dropdown menu with "-Select-" selected). At the bottom, there are "Save" and "New" buttons.



## Assistance Summary List

1. list pane: This pane displays all of the documented Assistance Summaries.

▼ Assistance Summary

☒ Current Calendar Year ☐ Previous Years

Assistance ID	Case Type	Assistance Domain	Service	Start Date	End Date	Cost	Updated By
1	Career Development	Career Development	Career Preparation and Exploration	6/1/2021		0.00	
2	Career Development	Career Development	Credentials/Certification Status	6/1/2021		175.23	

Show 10 entries

First Previous 1 Next Last

- a. The list will default to the *Current Calendar Year* list. The *Previous Years* list contains any assistance rendered in prior calendar years. Select the ☒ *Previous Years* radio button to view the prior calendar year records.
- b. To view a specific *Assistance Summary*, click on the desired *Assistance Summary* in the grid. The record will now be viewable in the pane below.

**NOTE:** If an *Assistance Summary* record was entered in error and needs to be removed, email your Program Staff and Synergy Application Specialist to request this deletion. Please include the Case Name, Case Number, and Assistance ID in your email.

## For more information...

For assistance, please contact the Allegheny County Service Desk at [ServiceDesk@AlleghenyCounty.US](mailto:ServiceDesk@AlleghenyCounty.US) or call 412-350-HELP (4 3 5 7). Select Option 2 for the DHS Service Desk.

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>