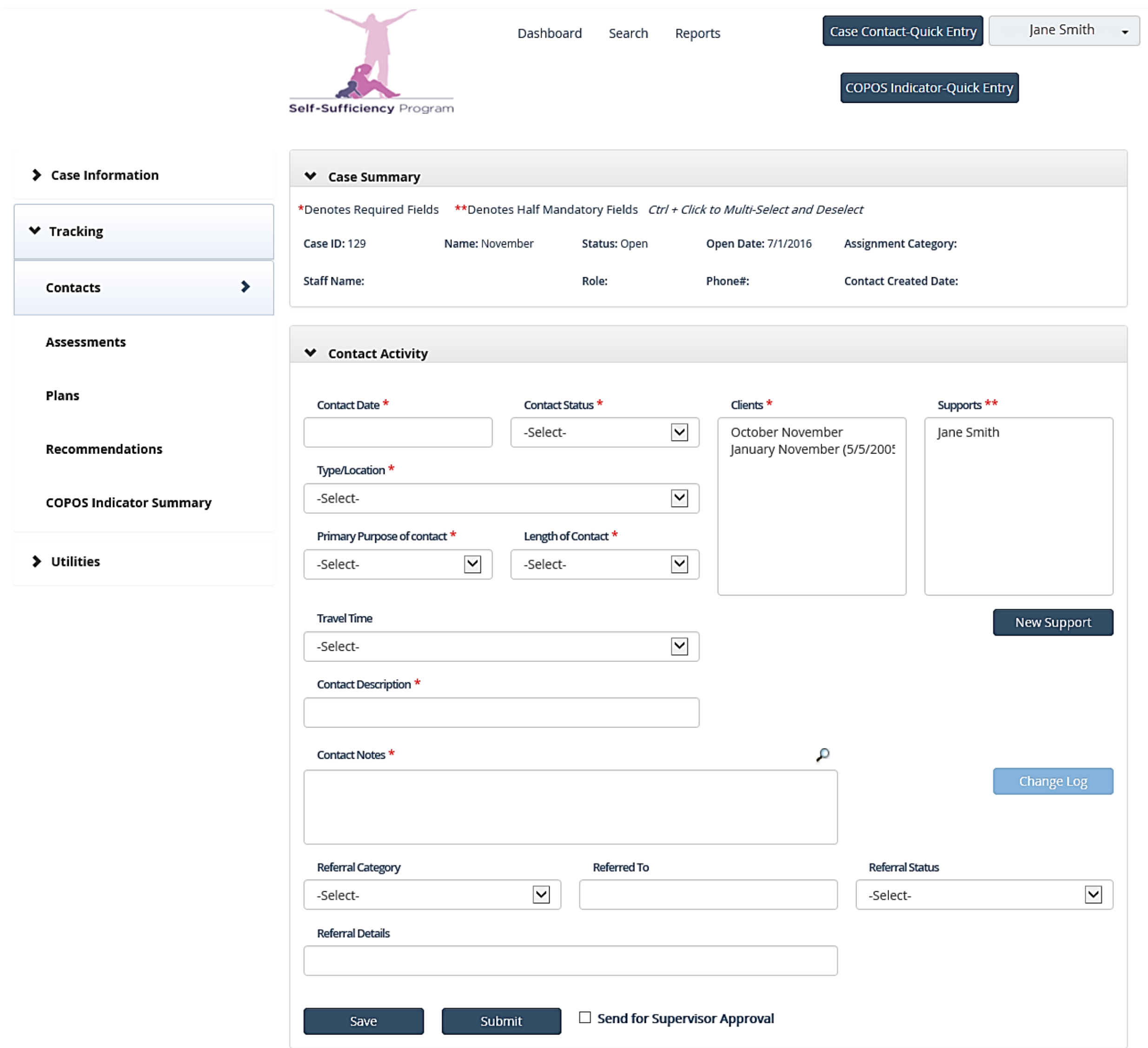
Case – Case Contacts – DHSSSP Job Aid

The *Case Contacts* screen is used to document when there is any type of communication related to the Case and its Participants or Household Members. Contacts created in the Referral will appear in the Case.

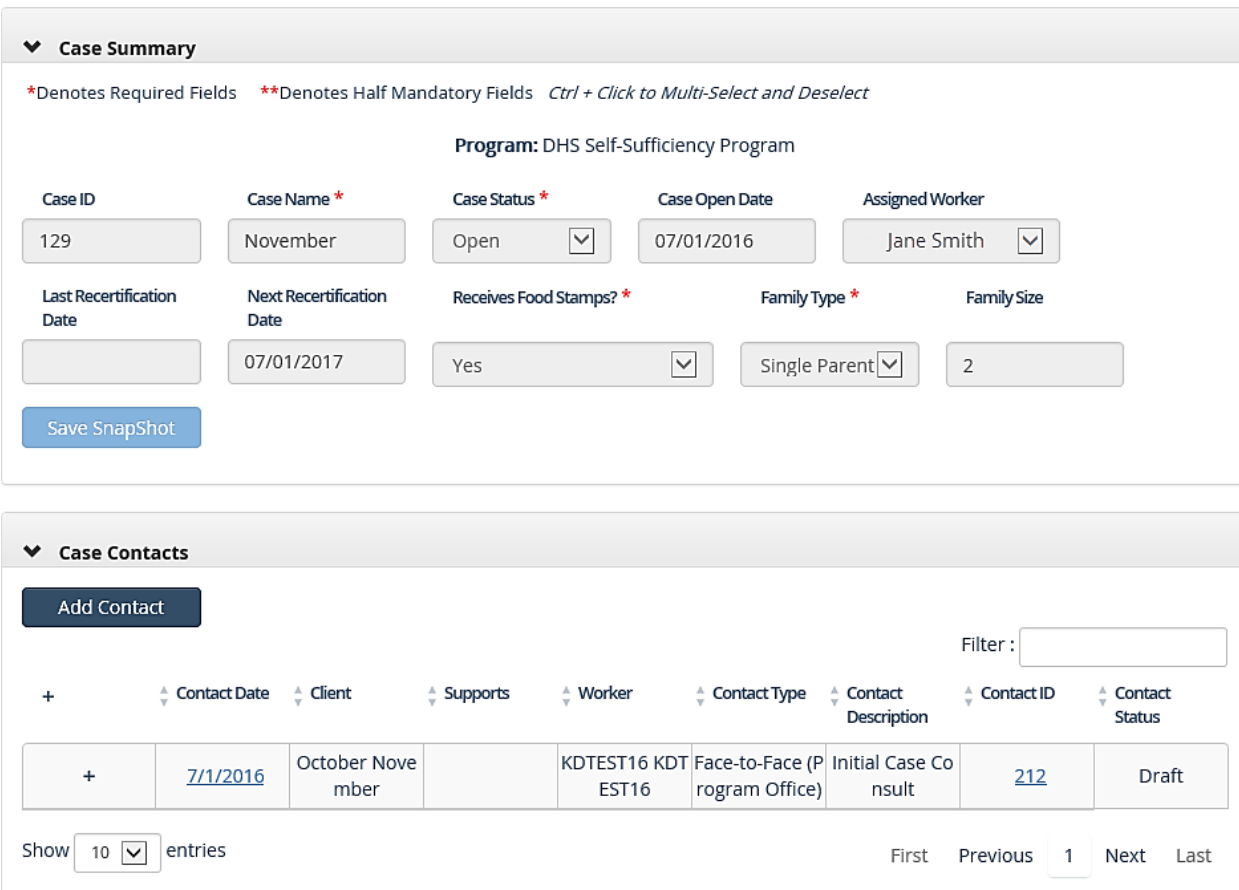
Case Contacts



Navigation

1. Contacts can be found under tracking and can be accessed several ways:
   a. From the Dashboard, locate the desired Case and click on the Contact icon [ ] in the grid. This will navigate directly to the *Contact* list screen.
   b. From within the case:
      i. Tracking → Contacts
      ii. From Case Information → Summary click on the *Add Contact* navigation tile: Add Contact.

Case Contacts screen



1. To view or update an existing Contact click on the *Contact Date* or *Contact ID* of the desired Contact in the *Case Contacts* grid.

2. To view the *Contact Notes* from the grid without opening the Contact click on the [+] to the left of

the Contact in the grid. To close the *Contact Notes* view, click on the [**-**] that now appears to the left of that Contact in the grid.

+	Contact Date	Client	Supports	Worker	Contact Type	Contact Description	Contact ID	Contact Status
-	7/1/2016	October Nove mber		Jane Smith	Face-to-Face (P rogram Office)	Initial Case Co nsult	212	Draft
Contact Notes : Initial Case Consult with October.								

Show 10 entries

First Previous 1 Next Last

3. To view the *Contact Notes* for all of the Contacts in the current page of the grid click on the [**+**] above the grid. To collapse all of the *Contact Notes* click on the [**-**] that now appears above the grid.

4. *Filter* allows the user to search within the *Case Contacts* grid for specific information.

5. To start documenting a new Contact click **Add Contact**.

Documenting a Contact

1. To start documenting a new Contact click **Add Contact**.

2. To view or update an existing Contact click on the *Contact Date* or *Contact ID* of the desired Contact in the *Case Contacts* grid.

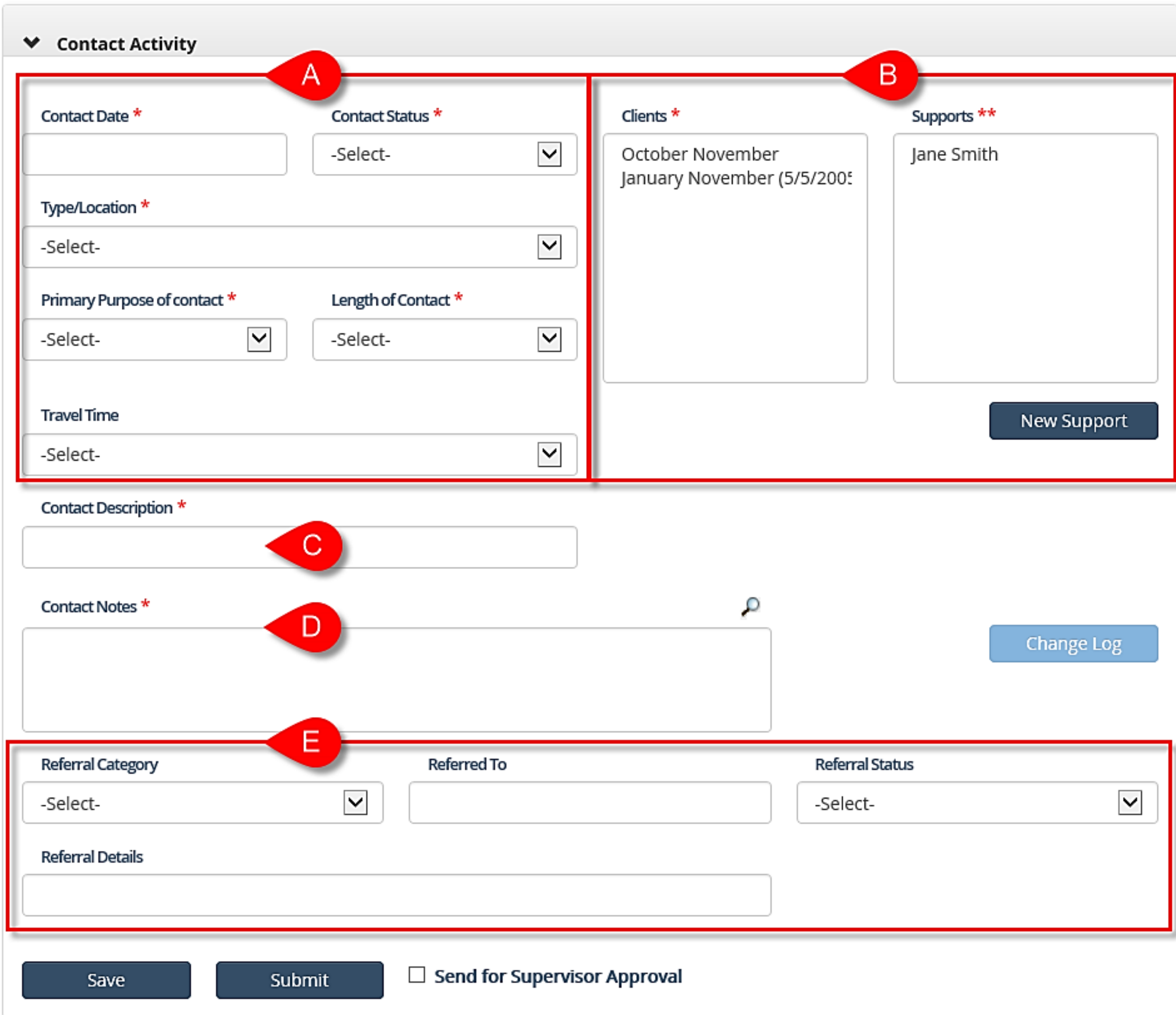
3. The **Case Summary** pane is non-editable and displays information about the Case and the Contact being viewed/edited. This information includes the *Case ID*, Case *Name*, Case *Status*, Case *Open Date*, *Assignment Category* the *Staff Name*, *Role*, *Phone#*, and the *Contact Created Date*.

Case Summary

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

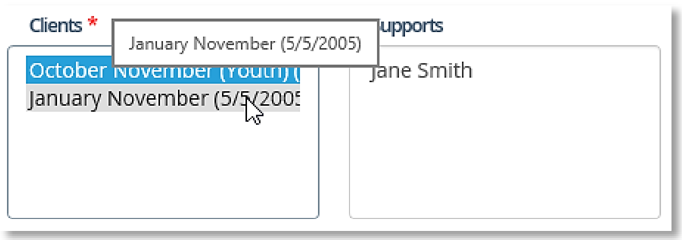
Case ID: 84	**Name:** November	**Status:** Open	**Open Date:** 11/23/2015	**Assignment Category:**
Staff Name: Amber Knight		**Role:** Caseworker	**Phone#:**	**Contact Created Date:**

4. The Contact Activity pane is where the primary details of the Contact are documented. The *Contact Date, Client (Participants/Household Members), Supports Worker,* and *Contact Description* will all pull into the *Case Contacts* grid once the Contact is saved.



a. Enter the *Contact Date* and select from the drop-downs the: *Contact Status* (Attempted or Completed), *Type/Location* of the Contact, *Primary Purpose of Contact*, *Length of Contact* and *Travel Time*.
b. *Clients* and *Supports*: Click to select the Clients and Supports who participated in the Contact from these two multi-select boxes. Only active Clients and Supports will be available as options.
    i. To select more than one person in the Client or Support boxes hold down the Ctrl key on the keyboard while clicking on each Client or Support who participated in the Contact. Selected individuals be highlighted in blue or grey after their names have been clicked. To de-select a Client or Support hold down the Ctrl key and click on the individual again. The de-selected individual will then no longer be highlighted.

ii. Clients will display with their name and date of birth. To view the full name and date of birth hover the cursor over the client's name.



iii. If a participating Client is not listed in the *Clients* box they can be added in Case Information → Household Only add a new Client if the person has not previously been documented as a Client on this case.

iv. If a participating Support is not listed in the Supports box they can be added using the New Support button. Remember that this list only includes active Supports. Only add a new Support if the person has not previously been documented as a Support on this case. An end-dated Support can be made active again in Case Information → Supports.

Activating or Adding a Client? Go to:
Case – Household – DHSSSP Job Aid

Making a Support active again? Go to:
Case – Supports – DHSSSP Job Aid

Adding a Support from the Contacts screen?
Go to page 7 of this Job Aid.

c. *Contact Description*: Enter a brief description on the Contact.
d. *Contact Notes*: Enter the narrative of the Contact here.
e. *Referral Information*: If a referral was made as part of this Contact document that information here.
   i. *Referral Category*: Select the applicable category from the drop-down.
   ii. *Referred To*: Enter where the referral was made to.
   iii. *Referral Status*: Select the Status of the Referral from the drop-down.
   iv. *Referral Details*: Enter a brief description of the referral that was made.

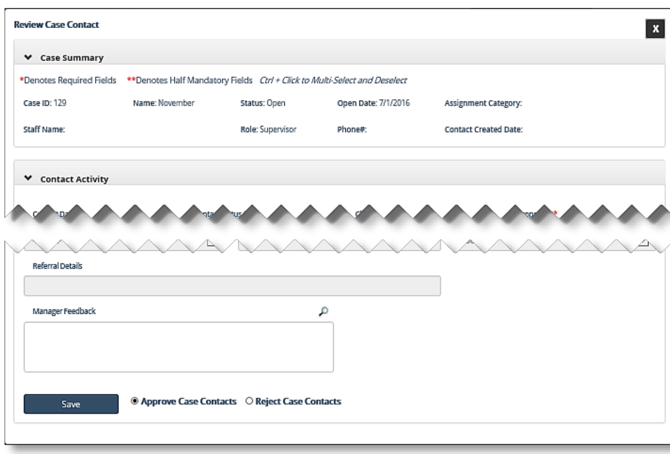
5. Clicking Save will save the information entered in the Contact will navigate back to the *Case Contacts* grid automatically.

   Clicking Cancel will navigate back to the *Case Contacts* grid. Any unsaved information will be lost.

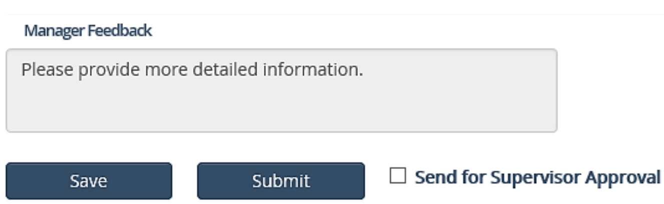
6. Sending for approval: If approval is required for the user's Case Contacts the **Submit** button and the ☐ *Send for Supervisor Approval* checkbox will appear next to the **Save** button.
   a. Check the ☑ *Send for Supervisor Approval* checkbox and click **Submit** to send the Contact for approval. The Contact's *Status* in the *Case Contacts* grid will change from "Draft" to "Pending Approval"
   b. The Contact will appear in the Supervisor or Manager's Dashboard under **Unapproved Case Contacts**. From there the Supervisor/Manager can either approve or reject the Contact by clicking on the *Contact ID*.
      i. The *Review Case Contact* pop-up will open to display all of the Contact details. Selecting ◉ *Approve Case Contacts* and clicking **Save** will approve the Contact.

         Selecting ◉ *Reject Case Contacts*, entering *Manager Feedback* and clicking **Save** will send the Contact back to the submitting staff person.

         Clicking the **X** in the top right corner of the pop-up will close the pop-up without saving anything; the Contact will then remain in the **Unapproved Case Contacts** pane until it has been approved or rejected.



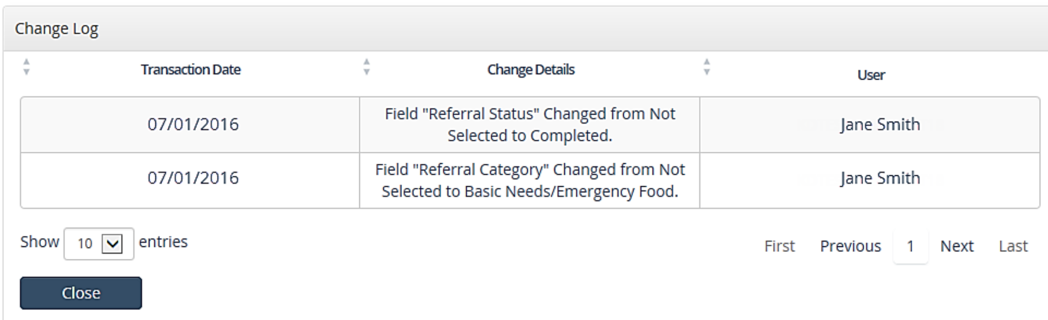
      ii. Rejected Contacts will appear on the Dashboard of the worker who submitted the Contact under **Unapproved Case Contacts**. Clicking on the *Contact ID* will navigate directly to the Contact where the *Manager Feedback* will be displayed at the bottom of the screen.



         The worker can then update the Contact and resubmit the Contact for approval by checking the ☑ *Send for Supervisor Approval* checkbox and clicking **Submit**.

iii. Approved Contacts will have a *Status* of "Submitted" in the *Case Contacts* list. Approved Contacts can be updated and resubmitted at which point their status will return to "Pending Approval".

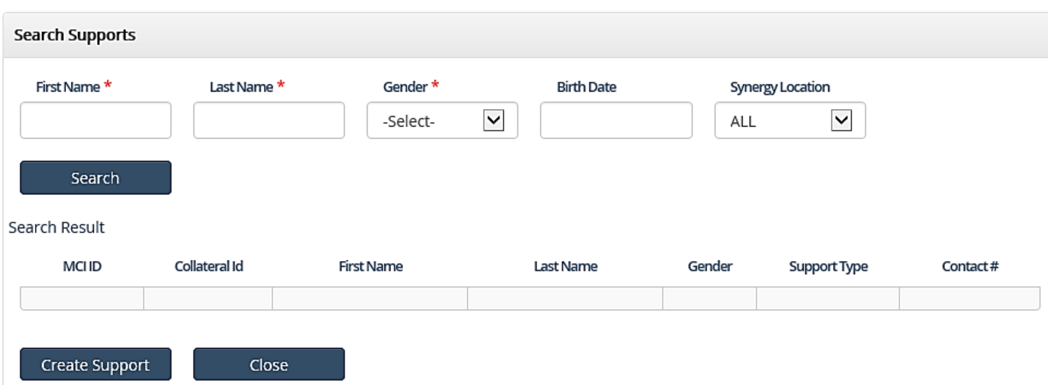
7. The **Change Log** button will become dark blue (active) when any changes have been made to the Contact after the Contact has been saved for the first time. Clicking on the **Change Log** button will open the *Change Log* pop-up. In this pop-up the date of each change (*Transaction Date*), *Change Details*, and *User* who made the change will be listed.



Click **Close** to close the *Change Log* pop-up.

Creating a new Support from within the Case Contact

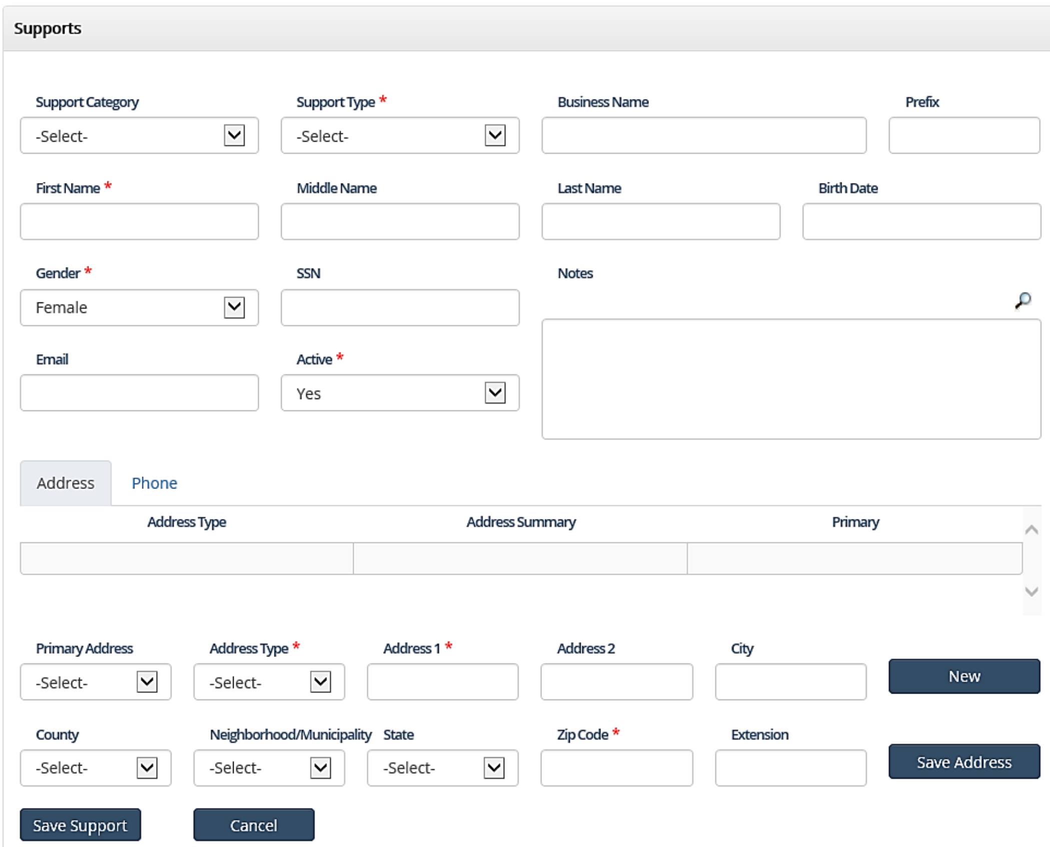
1. Adding a new Support from within the **Contact Activity** pane:
   a. Click the **New Support** button.
   b. The *Search Supports* pop-up will appear:



i. Enter the *First Name, Last Name, Gender,* and *Birth Date* (if known).
ii. Select the *Search Location*. Supports can be searched for in all of Synergy or only in a specific program such as DHSSSP, YSP or HCM.

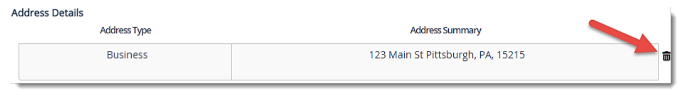
iii. Click the **Search** button to locate possible matches in the system. A list of possible matches will display in the *Search Result* grid.
iv. Review the results. If none of the results match the person being added, click **Create Support** without selecting anyone from the *Search Result* grid.
v. If there is a match in the *Search Result* grid click the desired person's line in the *Search Result* grid and then click **Create Support**.
vi. To close the *Search Support* pop-up without adding a support click **Close**.

c. When **Create Support** is clicked the *Supports* pop-up will appear.



i. Enter all of the relevant information for this Support in the *Supports* pop-up.
ii. Multiple addresses can be entered for the Support. The Support can also be saved without entering an address.
1. To add a new address click **New**.
2. When the address is completed click **Save Address** to add this address to the *Address* grid.

3. If an address has been added in error click the delete icon [🗑] to the right of the address in the *Address* grid to delete it.



iii. Multiple phone numbers can be entered for the Support as well. The Support can also be saved without entering a phone number.
   1. To add a new phone number, click on the *Phone* tab and then click **New**.
   2. Enter all of the known phone information and click **Save** to add this phone number to the *Phone* grid.
   3. If a phone number has been added in error click the delete icon [🗑] to the right of the phone number in the *Phone* grid to delete it.

2. To save the Support click **Save Support**.
3. To close the pop-up without saving the Support click **Cancel**.

For more information…

For assistance, please Contact the Allegheny County Service Desk at ServiceDesk@AlleghenyCounty.US or call 412-350-HELP (4357). Select Option 2 for the DHS Service Desk.

To access the Self Service Tool go to http://servicedesk.alleghenycounty.us