



## 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

Dashboard Search Reports

Case Contact-Quick Entry Jane Smith

COPOS Indicator-Quick Entry

Case Information

Tracking

Contacts

Assessments

Plans

Recommendations

COPOS Indicator Summary

Utilities

Case Summary

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

Case ID: 129

Name: November

Status: Open

Open Date: 7/1/2016

Assignment Category:

Staff Name:

Role:

Phone#:

Contact Created Date:

Contact Activity

Contact Date \*

Contact Status \*

Clients \*

Supports \*\*

Type/Location \*

Primary Purpose of contact \*

Length of Contact \*

Travel Time

Contact Description \*

Contact Notes \*

Referral Category

Referred To

Referral Status

Referral Details

Save

Submit

☐ Send for Supervisor Approval


New Support

Change Log




## 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: .

## Case Contacts screen

**Case Summary**

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

**Program:** DHS Self-Sufficiency Program

Case ID	Case Name *	Case Status *	Case Open Date	Assigned Worker
129	November	Open	07/01/2016	Jane Smith
Last Recertification Date	Next Recertification Date	Receives Food Stamps? *	Family Type *	Family Size
	07/01/2017	Yes	Single Parent	2

Save SnapShot

**Case Contacts**

Add Contact

Filter :

+	Contact Date	Client	Supports	Worker	Contact Type	Contact Description	Contact ID	Contact Status
+	<a href="#">7/1/2016</a>	October November		KDTEST16 KDT EST16	Face-to-Face (Program Office)	Initial Case Consult	<a href="#">212</a>	Draft

Show  entries

First Previous **1** Next Last

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 November		Jane Smith	Face-to-Face (Program Office)	Initial Case Consult	212	Draft
Contact Notes : Initial Case Consult with October.								
Show 10 entries First Previous 1 Next Last								

- 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.
- Filter* allows the user to search within the *Case Contacts* grid for specific information.
- To start documenting a new Contact click **Add Contact**.

## Documenting a Contact

- To start documenting a new Contact click **Add Contact**.
- To view or update an existing Contact click on the *Contact Date* or *Contact ID* of the desired Contact in the *Case Contacts* grid.
- 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.

The screenshot shows the 'Contact Activity' form. Callout A points to the 'Contact Date', 'Contact Status', 'Type/Location', 'Primary Purpose of contact', 'Length of Contact', and 'Travel Time' fields. Callout B points to the 'Clients' and 'Supports' multi-select boxes. Callout C points to the 'Contact Description' text area. Callout D points to the 'Contact Notes' text area. Callout E points to the 'Referral Category', 'Referred To', 'Referral Status', and 'Referral Details' fields. The form includes 'Save', 'Submit', and 'Send for Supervisor Approval' buttons at the bottom.

- 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*.
- 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.
  - 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.

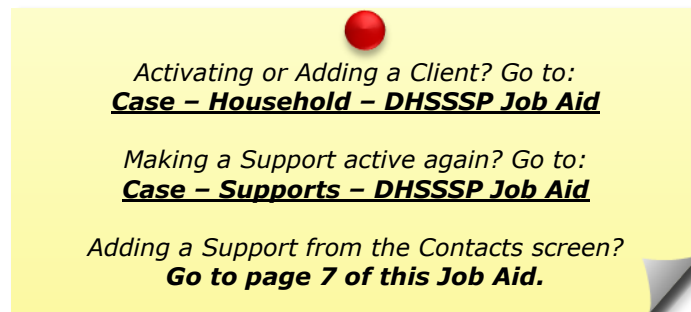


- ii. Clients will display with their name and date of birth. To view the full name and date of birth hover the cursor over the client's name.

- iii. If a participating Client is not listed in the *Clients* box they can be added in

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



- 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.
- 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"
  - 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*.
    - 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.

- 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.

The Change Log pop-up window displays a table with three columns: Transaction Date, Change Details, and User. It shows two entries for 07/01/2016. Below the table is a 'Show' dropdown set to 10 entries, and pagination links for First, Previous, 1, Next, and Last. A Close button is at the bottom left.

Transaction Date	Change Details	User
07/01/2016	Field "Referral Status" Changed from Not Selected to Completed.	Jane Smith
07/01/2016	Field "Referral Category" Changed from Not Selected to Basic Needs/Emergency Food.	Jane Smith

Show 10 entries First Previous 1 Next Last

Close

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:

The Search Supports pop-up window contains search criteria fields: First Name, Last Name, Gender, Birth Date, and Synergy Location. A Search button is below. The Search Result section shows a table with columns: MCI ID, Collateral Id, First Name, Last Name, Gender, Support Type, and Contact #. At the bottom are Create Support and Close buttons.

Search Supports

First Name \* Last Name \* Gender \* Birth Date Synergy Location

Search

Search Result

MCI ID	Collateral Id	First Name	Last Name	Gender	Support Type	Contact #
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Create Support Close

- 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.

The screenshot shows a 'Supports' pop-up form. It contains several sections: a top section with 'Support Category', 'Support Type \*', 'Business Name', and 'Prefix'; a middle section with 'First Name \*', 'Middle Name', 'Last Name', 'Birth Date', 'Gender \*', 'SSN', and 'Notes'; a bottom section with 'Email' and 'Active \*'. Below these is an 'Address' section with a 'Phone' tab and an 'Address' tab. The 'Address' section includes a table with columns 'Address Type', 'Address Summary', and 'Primary'. Below the table are fields for 'Primary Address', 'Address Type \*', 'Address 1 \*', 'Address 2', 'City', 'County', 'Neighborhood/Municipality', 'State', 'Zip Code \*', and 'Extension'. At the bottom are buttons for 'Save Support', 'Cancel', 'New', and 'Save Address'.


- 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.


Address Details	
Address Type	Address Summary
Business	123 Main St Pittsburgh, PA, 15215




- 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  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 .

3. To close the pop-up without saving the Support click .

### 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 (4357). Select Option 2 for the DHS Service Desk.

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