



## Case - Case Summary – DHSSSP Job Aid

The *Case Summary* Screen displays basic assignment and Case Status information which can be updated by Supervisors and Managers. This screen also contains links to other sections of the Case. This is the screen is the only screen within a Case where a user can edit information in the *Case Summary* pane.

### Case Summary

The screenshot shows the 'Case Summary' screen. At the top, there's a header 'Case Summary' with a dropdown arrow. Below it, a legend states: '\*Denotes Required Fields \*\*Denotes Half Mandatory Fields Ctrl + Click to Multi-Select and Deselect'. The main section is titled 'Program: DHS Self-Sufficiency Program'. It contains several input fields: 'Case ID', 'Case Name \*', 'Case Status \*' (with a dropdown arrow), 'Assigned Worker' (with a dropdown arrow), 'Case Open Date', 'Last Recertification Date', and 'Next Recertification Date'. A 'Save Snapshot' button is located below these fields. Below this section is another header 'Additional Case Information'. It contains 'Receives Food Stamps? \*' (with a checked checkbox), 'Family Type \*' (with a dropdown arrow), and 'Family Size' (with an input field). A 'Save' button is below this section. The bottom section is titled 'Next Steps' and contains five buttons: 'Review Household', 'Enrollment History', 'Add Contact', 'View Case Plan', and 'Exit Case' (with a green arrow icon).

### Navigation

1. From the **Dashboard** : Locate the desired Case and click on the *Case ID* to bring the Case into focus; the **Summary** tile will open automatically.
2. From within the Case: Click on the **Case Information** tile. Then click on the **Summary** tile.



## Case Summary

1. *Program*: Displays the name of the Synergy program that this Case has been created in.
2. The **Case Summary** pane contains the following fields:

The screenshot shows the 'Case Summary' form. At the top, it says 'Program: DHS Self-Sufficiency Program'. Below this are several fields: 'Case ID' (794), 'Case Name' (Doe), 'Case Status' (Open), 'Case Open Date' (06/02/2016), and 'Assigned Worker' (Jane Smith). Below these are 'Last Recertification Date' and 'Next Recertification Date' (06/02/2017). There are also 'Receives Food Stamps?' (No), 'Family Type' (Single Parent), and 'Family Size' (1). At the bottom are 'Save' and 'Save Snapshot' buttons. Red callouts A through I point to various fields: A to Case ID, B to Case Name, C to Case Status, D to Case Open Date, E to Assigned Worker, F to the recertification date fields, G to Receives Food Stamps, H to Family Type, and I to Family Size.

- a. *Case ID* – This is the DHSSSP Case number for this Case and is not editable.
- b. *Case Name* – This is the DHSSSP Case name for this Case and can be updated.
- c. *Case Status* – The Case can be closed by selecting “Closed” from the *Case Status* drop-down and click **Save**.

**NOTE:** See page 5 of this Job Aid for instructions on how to close a case.

- d. *Case Open Date* – This displays the most recent date that the Case was opened with DHSSSP and is not editable.
- e. *Assigned Worker* – This displays the name of the worker assigned to the Case and can be changed by a Supervisor or Manager.



- f. *Last Recertification Date* and *Next Recertification Date*: Synergy will calculate the *Next Recertification Date* based on the date that the Case opened. Once a date has been entered in the *Last Recertification Date* Synergy will re-calculate the *Next Recertification Date*.
- When the Case is recertified the user will enter the Recertification Date in the *Last Recertification Date* field and click **Save**.
  - When a new Recertification date is entered the **Save SnapShot** button will be enabled and will turn dark blue. When the user clicks the **Save SnapShot** button a report will be generated with all of the information on the Case as of the day that the button is clicked.

**IMPORTANT NOTE:**

It is **vital** that the user clicks the **[Save SnapShot]** on, or as close to, the date of the Recertification as possible.

If this button is not clicked, the Report of the Case Record at the time of Recertification will **NOT** be preserved.

Note that Synergy saves the report on the actual day that the **[Save SnapShot]** button is clicked.

After making any changes to the *Case Summary* pane the user must click the **Save** button inside the *Case Summary* pane in order to preserve the updated information.

### Additional Case Information

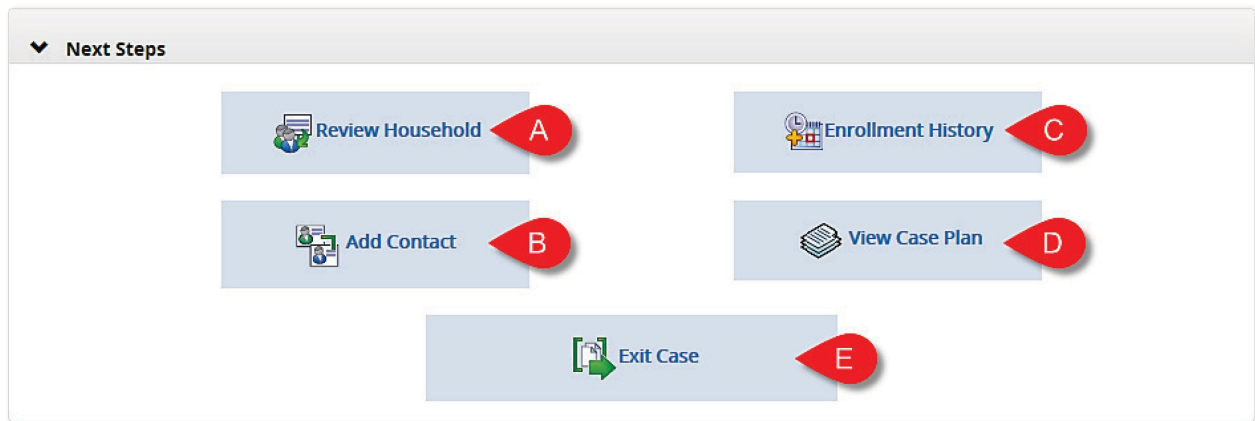
1. **Additional Case Information** pane:

- Receives Food Stamps*: To answer, select "Yes" or "No" from the drop-down.
- Family Type*: Select the Family Type from the drop-down.
- Family Size*: The size of the family is automatically calculated based on the number of individuals documented in the **Household Information** pane. This field cannot be edited.



## Next Steps

1. The **Next Steps** pane contains quick link buttons to the most commonly used Case screens.



- a. *Review Household*: Clicking on this tile navigates to the **Household** screen.
- b. *Add Contact*: Clicking on this tile navigates to the **Contacts** screen.
- c. *Enrollment History*: Clicking on this tile opens the **Enrollment History** pane which displays all of the past and current DHSSSP referrals and cases documented for this Participant.

Referral Date	Referral ID	Household Member	Referred By	Referral Category ID	Referral Source	Assigned worker ID	Referral Status
06/01/2016	2476	Jane Doe					Accepted


Show  entries

First Previous **1** Next Last

- d. *View Case Plan*: Clicking on this tile navigates to the **Plans** screen.
- e. *Exit Case*: Clicking on this tile navigates to the **Dashboard**.

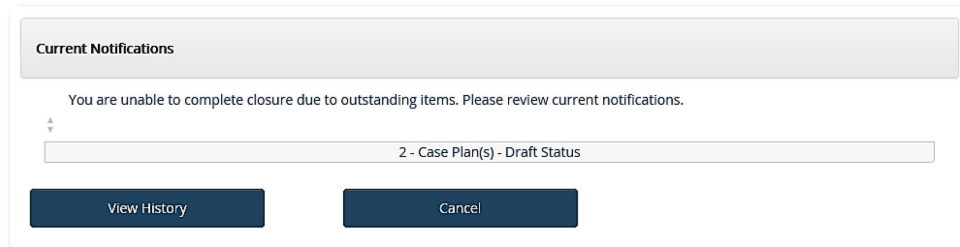


## Preparing the Case for Closure

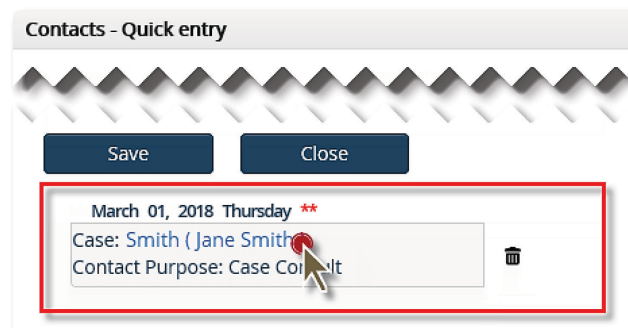
1. From the **Dashboard**: Locate the Case and click on the *Case ID* to bring the Case into focus.
2. Start the closure process by clicking on the Closure Validation Folder Icon [  ] above the **Case Summary** pane.



3. Make note of all items listed in the *Current Notifications* pop-up that must be resolved before closure can occur.



- a. Click **Cancel** to close the *Current Notifications* pop-up.
  - b. Clicking **View History** will display the *Override History* for this Case.
4. The following unresolved items may prevent closure:
    - a. **Case Plans** with a status of: *Draft, In Progress, or Rejected*.  
[ [Case Plan Job Aid](#) ]
    - b. **Assessments** with a status of: *Draft, In Progress, or Rejected*.  
[ [Assessments: ANSA Job Aid](#) ]
    - c. **Contacts** with a status of: *Draft, In Progress, or Rejected*.  
[ [Case Contacts Job Aid](#) ]
    - d. **Case Contact–Quick Entry** contact drafts that remain in the *Contacts Quick–Entry* pop-up.  
[ [Case Contact–Quick Entry Job Aid](#) ]





## Closing the Case

- Once all unresolved items have been completed, navigate to the **Case Summary** screen and close the Case.
- Navigation:
  - From the **Dashboard** :  
Locate the desired Case and click on the *Case ID* to bring the Case into focus; the **Summary** tile will open automatically.
  - From within the Case:  
Click on the **Case Information** tile. Then click on the **Summary** tile.
- In the **Case Summary** pane select selecting "Closed" from the *Case Status* drop-down and click **Save**. Note: If there are still unresolved items the *Current Notifications* pop-up will appear instead of the *Case Closure Details* pop-up.

**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 *	Assigned Worker
<input type="text"/>	<input type="text"/>	Open <input type="button" value="v"/>	<input type="text"/>
Case Open Date	Last Recertification Date	Next Recertification Date	
<input type="text"/>	<input type="text"/>	<input type="text"/>	


**Save SnapShot**

**Additional Case Information**



**Save**

**NOTE:** If you are unable to resolve the items required for closure, contact your Application Specialist(s) for further assistance.



4. Complete the *Case Closure Details* pop-up and click  to close the Case.

The image shows a 'Case Closure Details' pop-up form. It has a title bar at the top. Below the title bar, there are three main sections: 'Close Date\*' with a text input field (labeled A), 'Reason for Closure\*' with a dropdown menu (labeled B), and 'Closure Notes\*' with a large text area (labeled C). At the bottom of the form, there are two buttons: 'Save' (labeled D) and 'Cancel' (labeled E). A magnifying glass icon is located to the right of the 'Closure Notes' text area.

- Close Date*: This date defaults to today's date but can be edited if necessary.
- Reason for Closure*: Select the *Reason for Closure* from the drop-down.
- Closure Notes*: Enter any relevant notes about the case closure.
- Clicking  will close the Case.
- Clicking  will close the *Case Closure Details* pop-up without closing the Case; information entered will not be saved.

### 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 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>