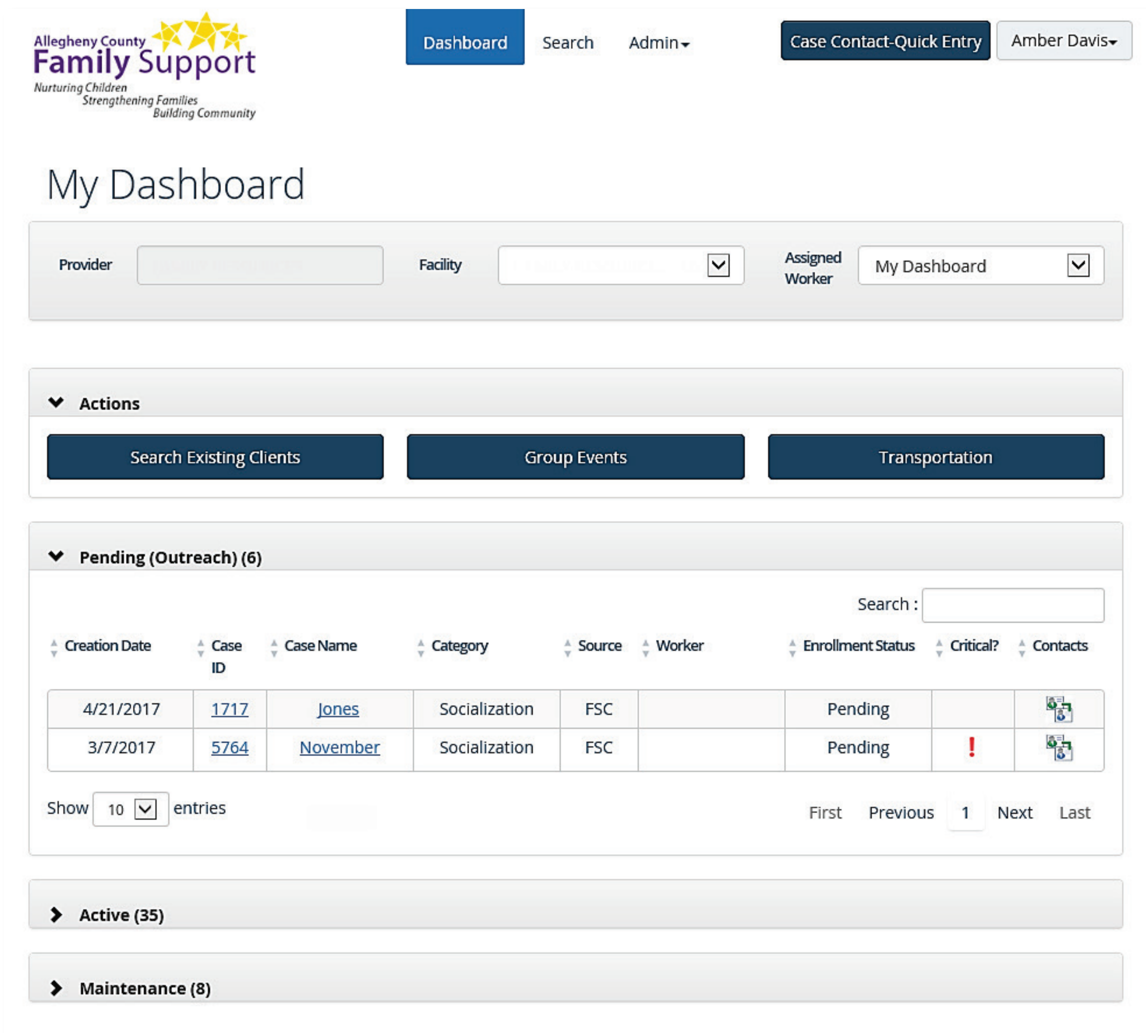
My Dashboard – FSC Job Aid

The *My Dashboard* screen is the first screen that appears after logging onto the Family Support Centers application. This screen allows workers to access their Active and Pending (Outreach) Cases as well as recently approved or rejected requests for approval. Depending on their role, users can also search for existing clients as well as document Group Events, and Transportation.

My Dashboard

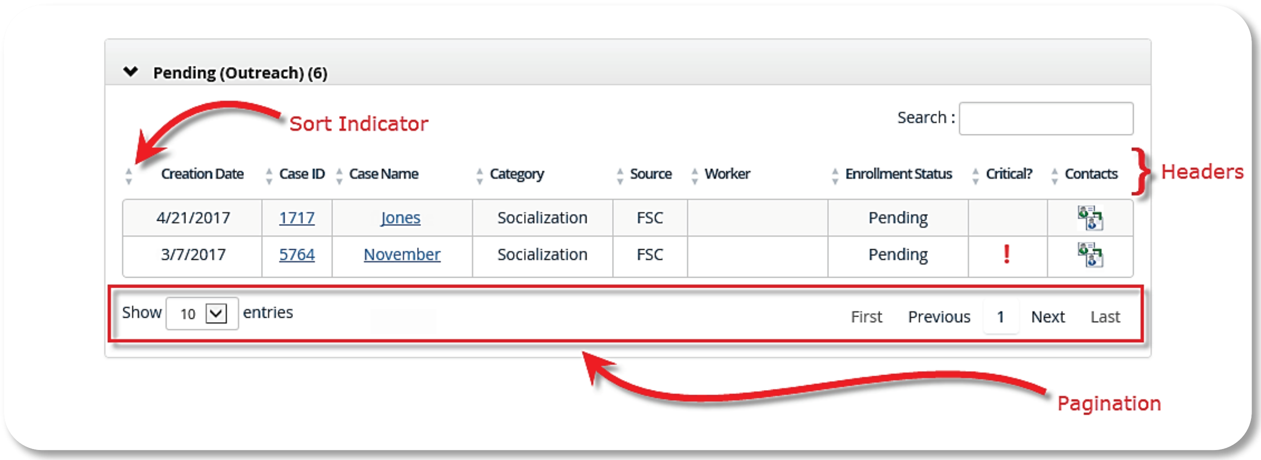


Accessing My Dashboard

1. The Dashboard button can be found at the top of every FSC screen.

   Clicking on the Dashboard button or the Family Support Centers logo [Allegheny County Family Support] at the top of any screen will also navigate the user to the Dashboard.

Basic List Elements



- **Headers:** Identify what type of information can be found in the grid columns.

- **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 desired *Header*. The sort indicator will point upward [ ] for ascending order or downward [ ] for descending order.

- **Hyperlinks:** Hyperlinks within the grid will open the item in the grid. Clicking on **1717** or **Jones** will open that Case.

- **Critical:** If a Case has been flagged as critical there will be an exclamation point [!] in the *Critical* column.

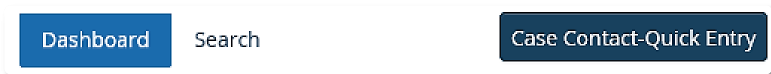
- **Contacts:** Click on the Contacts Icon [ ] in the *Contacts* column to navigate directly to the *Contacts* screen for that Case.

- **Pagination:** Longer lists will be separated into pages. These pages can be navigated by using the **First Previous 1234 Next Last** links to the bottom-right of the grid. To the bottom-left of the grid is a drop-down option, **Show 10 entries**, that allows users to change the number of grid entries displayed per page.

- **Search:** 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 "FSC" will filter the list to all Cases with a source of *FSC*.
  - This search also accepts partial entries. For example, typing "2017" will filter this list to include any Cases in *2017*. Typing "Soc" will bring up all Cases with a Category of *Socialization*.
  - To clear the search results, click the **X** that appears to the right inside the search field or delete the search terms.

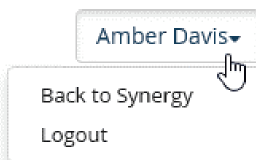
1. After clicking the Family Support Centers tile [Allegheny County Family Support] on the Synergy splash screen, the user will be taken directly to the Dashboard.
   a. All of the panes on this screen will be closed by default. Use the chevrons [ ] to open and close the panes. The title of each pane also contains the number of items in that pane in parenthesis, for example: **Active (5)**.

2. *Static Navigation Buttons*:



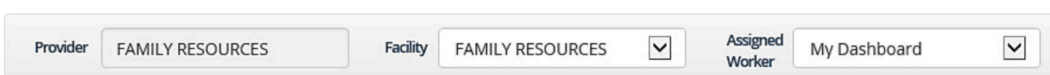
These navigation buttons will always be at the top of the screen and can be accessed from any screen in Synergy. Depending on the User's level of access there may be more or less options available. All users will have *Dashboard*, *Search,* and *Case Contact-Quick Entry*.
See the **Case Contact – Quick Entry – FSC Job Aid** for details on how to use the *Case Contact-Quick Entry button*.

3. *User Menu*: The name of the logged in user will be displayed here.



Clicking on the drop-down will give the user the options to log out or navigate back to the Synergy login splash screen.

4. *Provider, Facility,* and *Assigned Worker*:

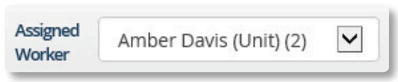


   a. *Provider*: This will display the Provider that the logged in user is associated to.

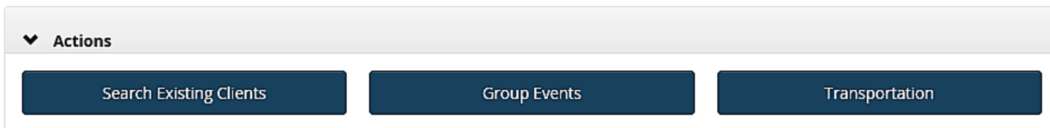
   b. *Facility*: This will display the specific Facility (location) that the logged in user is assigned to.
      i. Managers for Providers with more than one Facility (location) will be able to select a specific Facility (location) from the drop-down.

   c. *Assigned Worker*: For all users except Managers and Supervisors, this drop-down will be locked to "My Dashboard" and will only show items assigned to the logged in user.
      i. Managers and Supervisors can select other users from the *Assigned Worker* drop-down to view those user's Dashboards. Selecting "All" from the drop-down will display information from all users' dashboards.

ii. To view a specific Unit, select the unit from the drop-down. For Example: Selecting "Amber Davis (Unit)(2)" from the drop-down will display all of the Dashboard information for the 2 users in Amber Davis' unit:



5. *Actions*: The *Actions* pane allows the user to: *Search Existing Clients*, schedule *Group Events,* and document *Transportation.*



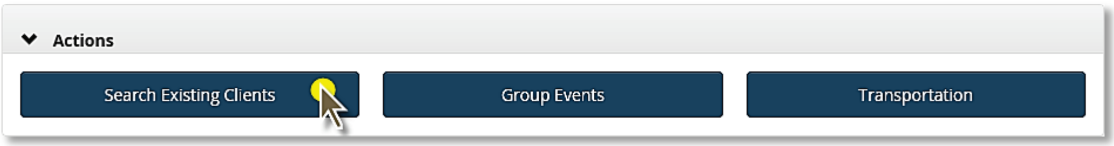
a. Search Existing Clients: This action button is used to create a new Case or re-open a closed Case. The user must first search Synergy to see if the individual has an existing Case before a new Case can be created.
b. Group Events: This action button allows the user to document Group Events and add Contact Notes for all of the attendees of an event. See the **Group Events – FSC Job Aid** for details on how to use Group Events.
c. Transportation: This action button allows the user to document when individuals have been transported and add Contact Notes for all of the individuals who were transported. See the **Transportation – FSC Job Aid** for details on how to use Transportation.

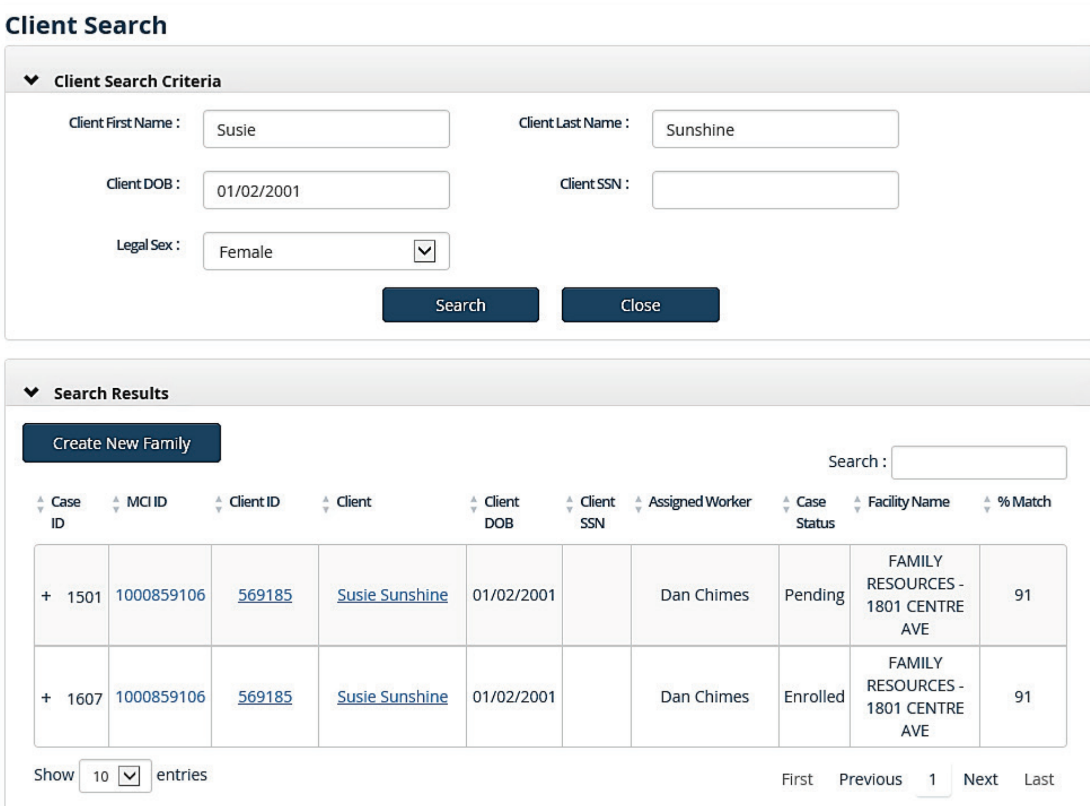
6. There may be several panes listed below the *Actions* pane, depending on the user's workload. If a particular pane does not have any entries for that user, that pane will not be visible on the dashboard. For example, if none of the user's Contact Notes have been rejected, the *Rejected Contact Notes* pane will not be visible.

a. *Pending (Outreach)*: Users who have Cases where the family is in the Outreach stage and has not yet been enrolled will have a *Pending (Outreach)* pane listing these Cases.
b. *Active*: Users who have assignments to Enrolled Families will have an *Active* pane listing all their active Families.
c. *Maintenance*: This pane contains a list of the user's Case where there has been no contact documented for 90+ days (30+ days for *Pending (Outreach)* Cases). When a new contact is entered on a Maintenance Case that Case will move back to their regular pane.
d. *Rejected…* panes: If a supervisor has rejected a Plan, Contact Note, or Assessment that rejected item will appear in a *Rejected* pane. Users can then click on the rejected item to review, edit, and resubmit for approval.
e. *Unapproved…* panes: Supervisors and Managers will have Unapproved panes for any Plan, Contact Note, or Assessment that has been sent to them.

Creating or Re-Opening a Case

1. *Search Existing Clients*: Click **Search Existing Clients** to open the *Client Search* pop-up.





   a. Enter all known information about the client in the *Client Search Criteria* and click **Search**.
   b. Review the *Search Results* and determine if the individual is one of the listed clients. Clicking on the *MCI ID* will open the individual's Client View information. Clicking on the *Client ID* or *Client* Name will navigate the user to that individual's Case.
   c. To view the Household Members of a Case in the *Search Results*, click the plus sign [**+**] to the left of the *Case ID* in the grid to expand the results.

d. If the desired individual is not one of the listed options, the user can click **Create New Family** to start a new Case.

Clicking **Close** will close the *Client Search* pop-up without creating a new Case.

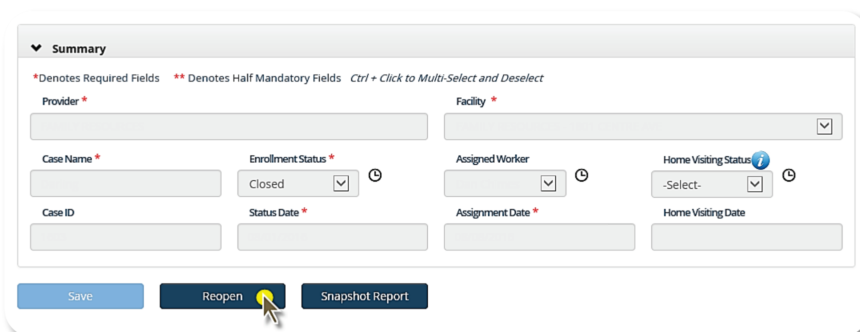
e. When **Create New Family** is clicked the *Facility Mapping* pop-up will appear.

i. Select the Family Support Center location from the Facility drop-down and click **Create** continue on to the new Case. Clicking **Cancel** will close the *Facility Mapping* pop-up without creating a new Case.

ii. Once **Create** is clicked, the user will automatically be navigated to the Household Members pop-up on the new Case's Household Info screen.

> *For more details on how to complete the **Household Info** screen, go to the **Household Info – FSC Job Aid**.*

2. Closed Cases can be re-opened by navigating to that Case and then clicking on the **Reopen** button which will be below the *Summary* pane on closed Cases. The Case will then be re-opened as a Pending (Outreach) Case.



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 I-Service, go to: https://servicedesk.alleghenycounty.us

This and other Job Aids can be found at: http://s3.amazonaws.com/dhs-application-support/index.htm