



Group Events – FSC Job Aid

The *Group Events* screen allows users to create an events calendar for the Family Support Center. A Contact will be added to each attendee's Case with the event details once an event has been saved as final. The Calendar can also be printed in a Month or Agenda format.

Group Events

Provider: Facility:

< > February 2017

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30 12:00pm - 1:00pm Lunch cooking lessons	31	1	2	3	4
5	6 12:00pm - 1:00pm Lunch cooking lessons	7	8	9	10	11
12	13 12:00pm - 1:00pm Lunch cooking lessons	14	15	16	17	18
19	20 12:00pm - 1:00pm Lunch cooking lessons	21	22	23	24	25
26	27 12:00pm - 1:00pm Lunch cooking lessons	28	1	2	3	4

Print Calendar Print Details

Navigation

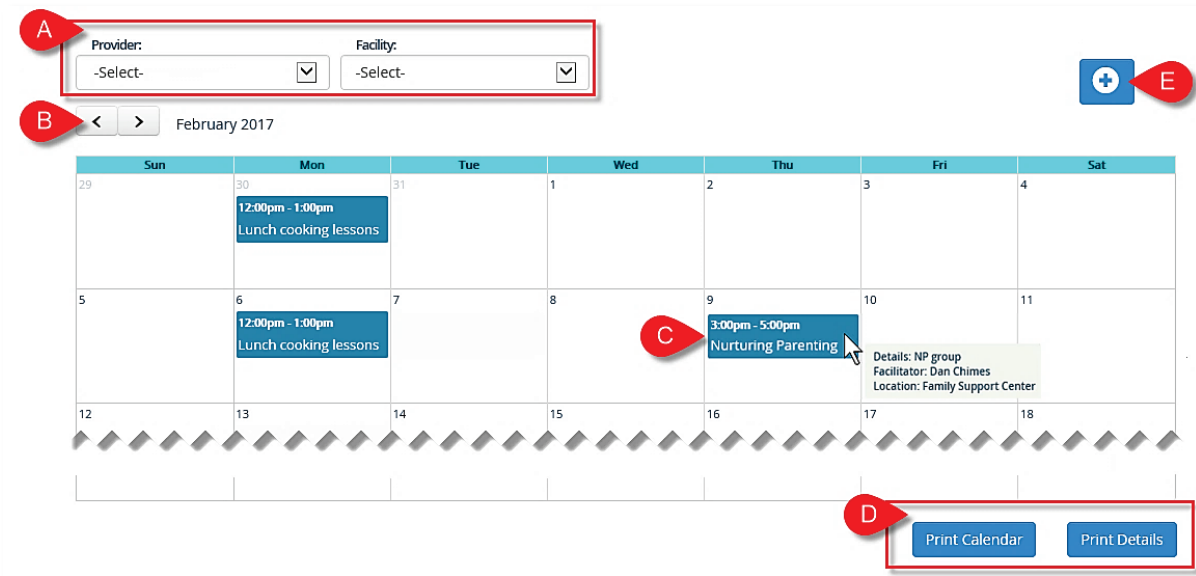
- From the **Dashboard** : Click the **Group Events** button in the **Actions** pane.

▼ Actions

Search Existing Clients Group Events Transportation

Group Events – Calendar

- The Events Calendar contains all scheduled events for the Provider and their Facility/Facilities.



- Provider:** This lists the name of the provider(s) that the logged in user is affiliated with. If the user is affiliated with more than one provider, a specific provider can be selected from the drop-down.
Facility: This lists the facility or facilities that are associated to the selected Provider. To view a calendar for a specific facility (location) select that facility from the drop-down.
- The calendar automatically displays the current month. Use the backward and forward arrows [ ] to move between months.
- To view information about an event without leaving the calendar screen, move the mouse cursor over that event. The *Details*, *Facilitator(s)* and *Location* of the event will then be visible.
 - To edit/update a specific event, click on that event in the calendar.
- The calendar can be printed in monthly calendar format or in a full agenda view.
 - Click  to print a full month view. This view shows a monthly calendar layout with the date, time and title of each event.
 - Click  to print an agenda view. This view shows a list of events for the month and includes the date, time, title, facilitator(s), and location of each event.
- Creating a new event: click the add new event button  above the top right corner of the calendar.



Creating and Editing Events

1. Click on the add new event button  above the top right corner of the calendar to create a new event.
2.  Event Information :

Event Information

 Event Information

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

Provider * 

Facility * 

Start Date * 

Start Time * 

End Time * 

Total Duration :-
XXXX

☐ Recurring Event 

Event ID 

Event Title * 

Event Type * 

Event Location * 

Event Details * 

☐ Home Visiting Model Group 

 Facilitator Information

 Attendee Information

Save as Draft

Save as Final

Delete Event

Cancel

- a. **Provider:** This lists the name of the provider(s) that the logged in user is affiliated with. If the user is affiliated with more than one provider, a specific provider can be selected from the drop-down.
- b. **Facility:** This lists the facility or facilities that are associated to the selected Provider. To create an event for a specific facility (location) select that facility from the drop-down.
- c. **Start Date:** Enter the date of the event (if this is a recurring event enter the first date of the series).

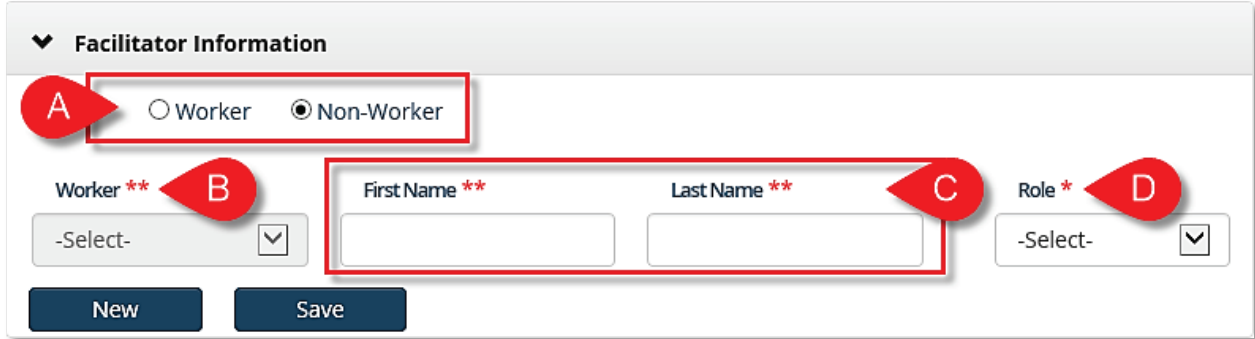


- d. *Start Time, End Time, and Total Duration*: Enter a Start Time and End Time for the event. The Total Duration will be automatically calculated based on the start and end time entered.
- e. *Recurring Event*: If this event is a recurring event check the ☒ *Recurring Event* checkbox. A new section will open up:

Start Date *	Start Time *	End Time *	Total Duration :-	☒ Recurring Event
			XX:XX	
Recurrence				
End Date *	Week Day(s) *			
	☐ Sunday ☐ Monday ☐ Tuesday ☐ Wednesday			
	☐ Thursday ☐ Friday ☐ Saturday			

- i. *End Date*: Enter the end date for this recurring series of events.
- ii. *Week Day(s)*: Select the day(s) of the week when the recurring event will be held using the checkboxes next to the days.
- f. *Event ID*: A unique ID will be assigned to each event by Synergy and cannot be edited.
- g. *Event Title*: Enter the name of the event here. This title will appear in the monthly calendar view.
- h. *Event Type*: Select the type of event from the drop-down.
- i. *Event Location*: Select the location of the event from the drop-down.
- j. *Event Details*: Enter a short description of the event.
- k. *Home Visiting Model Group*: If this event is part of the Home Visiting Model check the ☒ *Home Visiting Model Group* checkbox.

3. **Facilitator Information**: Enter the names and roles of all of the individuals who will be facilitating this event or series of events.



The form is titled "Facilitator Information". It contains the following fields and controls:

- Callout A:** Radio buttons for "Worker" and "Non-Worker". The "Non-Worker" button is selected.
- Callout B:** A dropdown menu labeled "Worker **" with "-Select-" as the current selection.
- Callout C:** Text input fields for "First Name **" and "Last Name **".
- Callout D:** A dropdown menu labeled "Role *" with "-Select-" as the current selection.
- Buttons: "New" and "Save".

- Worker/Non-Worker:** Select whether or not the Facilitator being entered is a ☐ *Worker* or ☒ *Non-Worker* using the radio buttons.
- Worker:** If the ☒ *Worker* radio button was selected, choose the worker's name from the drop-down.
- First Name and Last Name:** If the ☒ *Non-Worker* radio button was selected, enter the first and last name of the facilitator.
- Role:** Select the facilitator's role from the drop-down.
- Click **Save** to save this facilitator.
- Click **New** to enter a new Facilitator.
- To delete a facilitator from the list click the Delete Icon [] to the right of the Facilitator in the *Facilitator Information* grid.

Facilitator Information		
FACILITATOR	ROLE	
Jane Smith	Activity Leader	

A *Confirm Delete* pop-up will appear: Clicking **Yes** will delete the Facilitator. Clicking **No** will cancel the action and the Facilitator will not be deleted.



4. **Attendee Information**: Click **Add Attendee** open the Add Attendees pop-up.

- Enter the attendee's *First Name*, *Last Name*, select their *Gender* from the drop-down and click **Search**.
- Review the *Search Results* and determine if the attendee is listed.
- 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. Select attendees by checking the checkbox next to each individual who is an attendee.

☐	+ 335	2952	Susie	Sunshine	Female	01/01/1985		Enrolled	FAMILY RESOURCES - 1801 CENTRE AVE
	☐	2957	Lucy	Sunshine	Female	2/2/2015		Enrolled	FAMILY RESOURCES - 1801 CENTRE AVE
	☐	2991	June	Sunshine	Female	5/17/2012		Enrolled	FAMILY RESOURCES - 1801 CENTRE AVE

- To add the selected attendees, click **Add Attendee**.



- e. If none of the individual is not one of the search results, click **Create New Attendee** and complete the *Create Attendee* pop-up:

The 'Create Attendee' pop-up form contains the following fields: First Name (Susie), Last Name (Sunshine), Gender (Female), DOB, Phone#, Email, and Role (-Select-). There are 'Create' and 'Cancel' buttons at the bottom right.

- i. The *First Name*, *Last Name*, and *Gender* will already be entered.
 - ii. If known, enter the individual's *DOB* (Date of Birth), *Phone #*, and *Email*.
 - iii. Indicate whether the individual is an Adult, Child, or Teen Parent using the *Role* drop-down.
 - iv. Click create to **Create** the new attendee.
 - v. Clicking **Cancel** will close the pop-up without creating a new attendee.
- f. All selected and created attendees will appear in a grid below the *Search Results*.

The 'Add Attendees' grid shows the following data:

Case ID	Client ID	Name	Role	Outreach	
431	3159	Susie Sunshine	Adult	☐	
		Sally Sunset	Adult	☐	

Buttons: Save, Cancel

- g. Additional Attendees can be added by repeating the Search and Add/Create process.
- h. Selecting an attendee for Outreach: If an attendee is not already part of an open case they can be added as a new Pending (Outreach) case by checking the checkbox in the Outreach column. To select all of the new attendees for outreach, check the *Outreach* ☒ checkbox above the grid. A new Pending (Outreach) case will be automatically created for each selected individual once the Event has been saved as final.
- i. To delete an Attendee from the list click the Delete Icon [] to the right of the Attendee in the grid.
- i. A *Confirm Delete* pop-up will appear: Clicking **Yes** will delete the Attendee. Clicking **No** will cancel the action and the Attendee will not be deleted.
- j. Click **Save** to add all of the attendees to the Event. Clicking **Cancel** will close the Add Attendees pop-up without saving any of the selected individuals.



5. Completing the Event:

Event Information

➤ Event Information

➤ Facilitator Information

➤ Attendee Information

Save as Draft

Save as Final

Delete Event

Cancel

- a. Once all of the Event information has been entered click **Save As Draft**.
A *Confirm Save* pop-up will appear: Clicking **Yes** will Save the Event. Clicking **No** will cancel the action and the Event will not be saved.
- b. To delete an event, click **Delete Event**.
A *Confirm Delete* pop-up will appear: Clicking **Yes** will delete the Event. Clicking **No** will cancel the action and the Event will not be deleted.
- c. Once an event has occurred the event's Facilitators and Attendees can be edited and updated.
Clicking **Save As Final** will complete the event and add a Contact for the Event to each Attendee's Case. Note: Events cannot be saved as final until after they have occurred.
- d. When **Save As Draft** is clicked a *Confirm Save* pop-up will appear: Clicking **Yes** will save the Event as final. Clicking **No** will cancel the action and the Event will not be saved as final.

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>