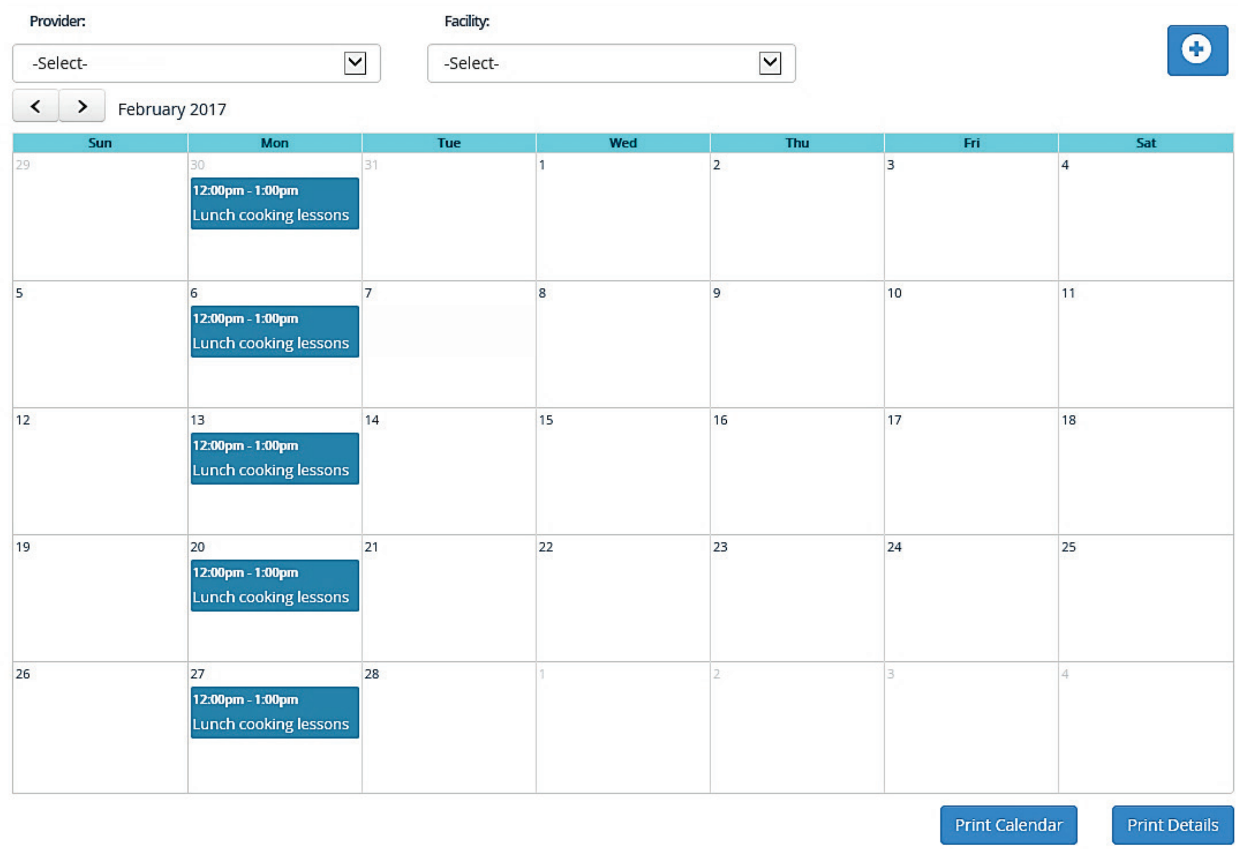
Group Events – FSC Job Aid

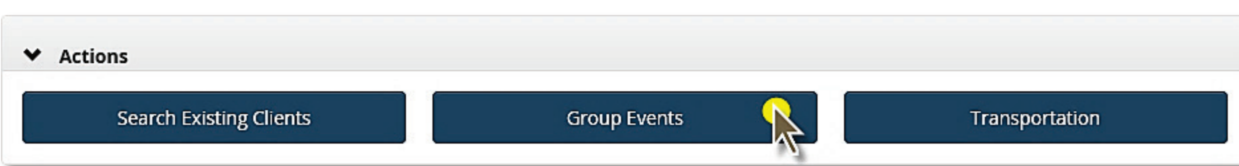
The *Group Events* screen allows users to create an events calendar for the Family Support Center. A Contact will be added to each attendee's Case with the event details once an event has been saved as final. The Calendar can also be printed in a Month or Agenda format.

Group Events



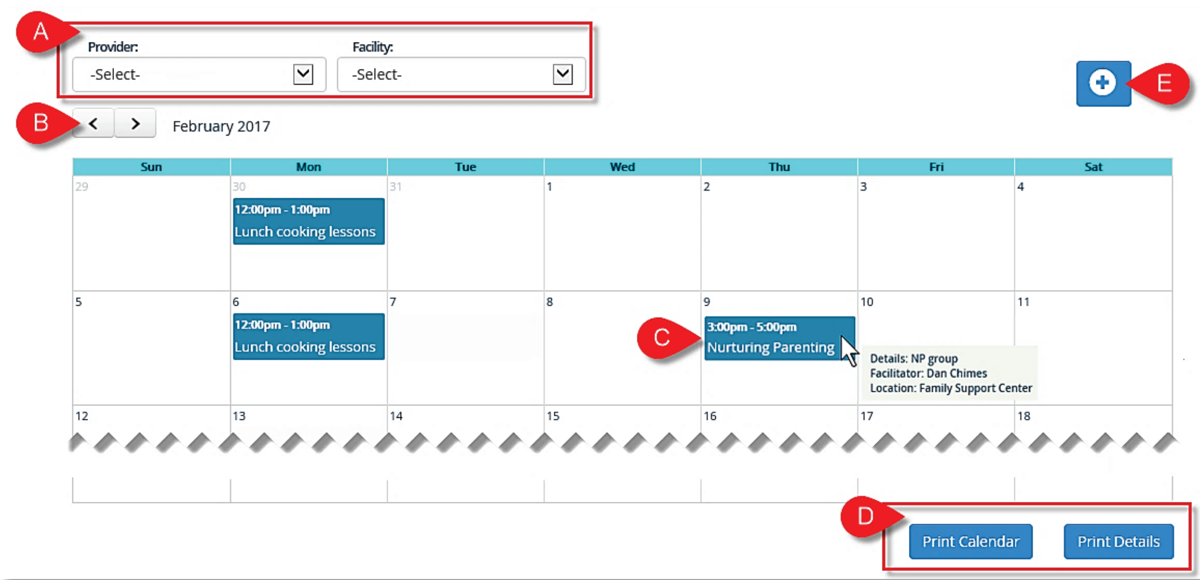
Navigation

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



Group Events – Calendar

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



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.
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.

b. The calendar automatically displays the current month. Use the backward and forward arrows [< >] to move between months.

c. 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.
   i. To edit/update a specific event, click on that event in the calendar.

d. The calendar can be printed in monthly calendar format or in a full agenda view.
   i. Click **Print Calendar** to print a full month view. This view shows a monthly calendar layout with the date, time and title of each event.
   ii. Click **Print Details** 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.

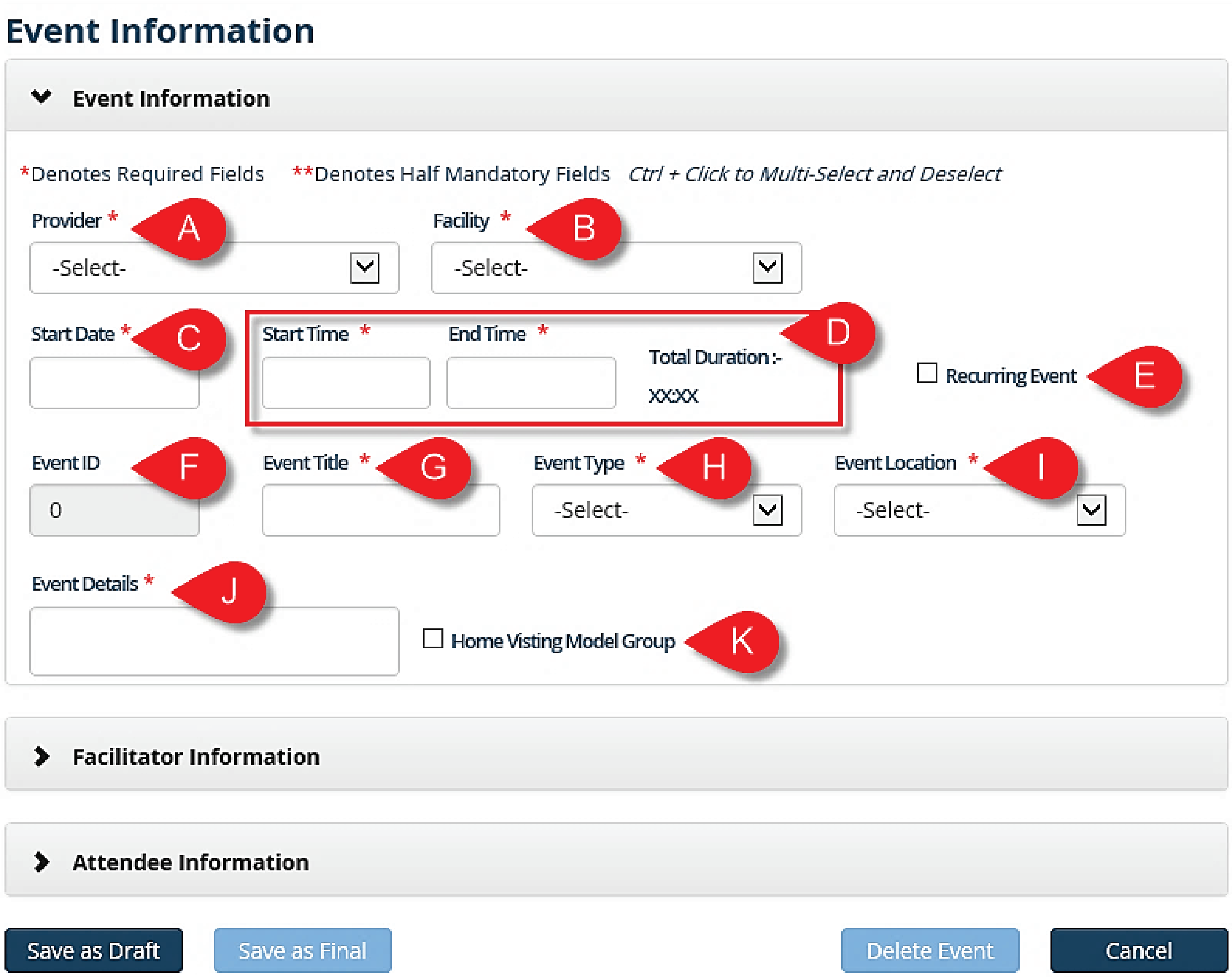
e. Creating a new event: click the add new event button ⊕ above the top right corner of the calendar.

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. 

:



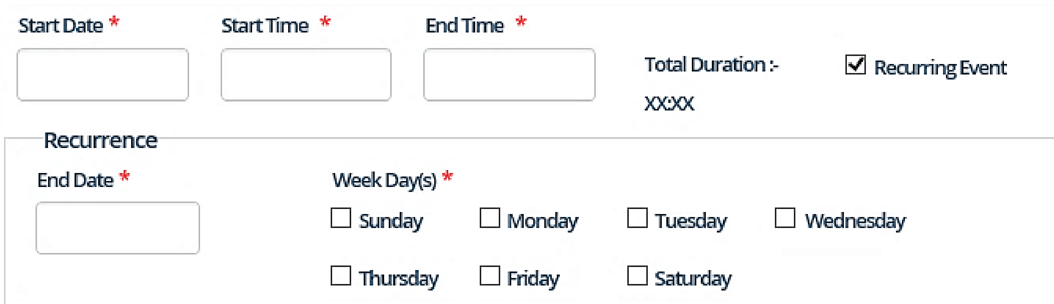
a. *Provider*: This lists the name of the provider(s) that the logged in user is affiliated with. If the user is affiliated with more than one provider, a specific provider can be selected from the drop-down.

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:



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.

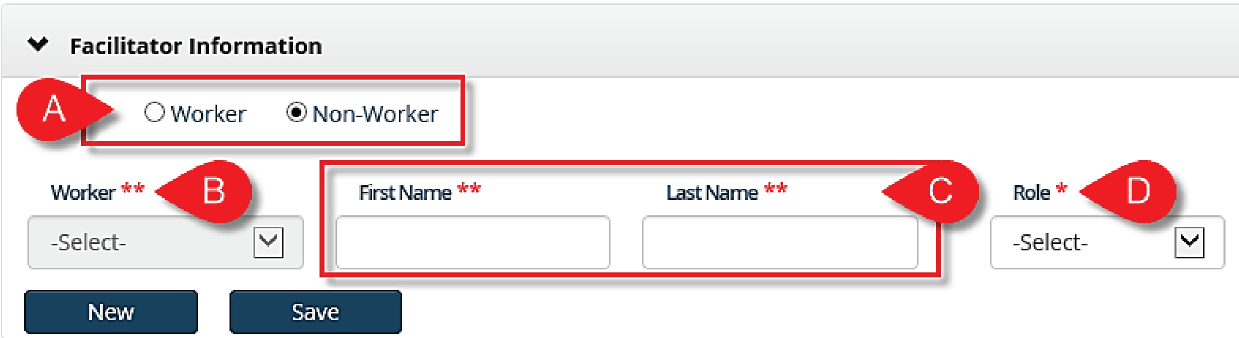
h. *Event Type*: Select the type of event from the drop-down.

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.



i. *Worker/Non-Worker*: Select whether or not the Facilitator being entered is a ○ *Worker* or ○ *Non-Worker* using the radio buttons.

ii. *Worker*: If the ◉ *Worker* radio button was selected, choose the worker's name from the drop-down.

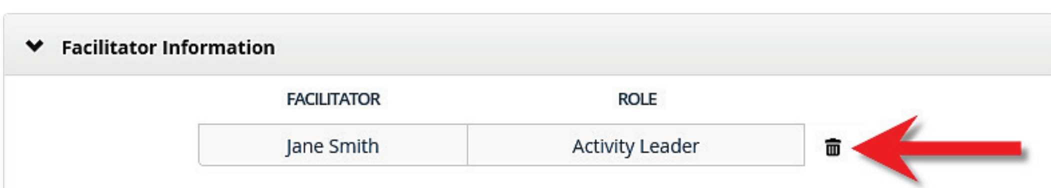
iii. *First Name* and *Last Name*: If the ◉ *Non-Worker* radio button was selected, enter the first and last name of the facilitator.

iv. *Role*: Select the facilitator's role from the drop-down.

v. Click **Save** to save this facilitator.

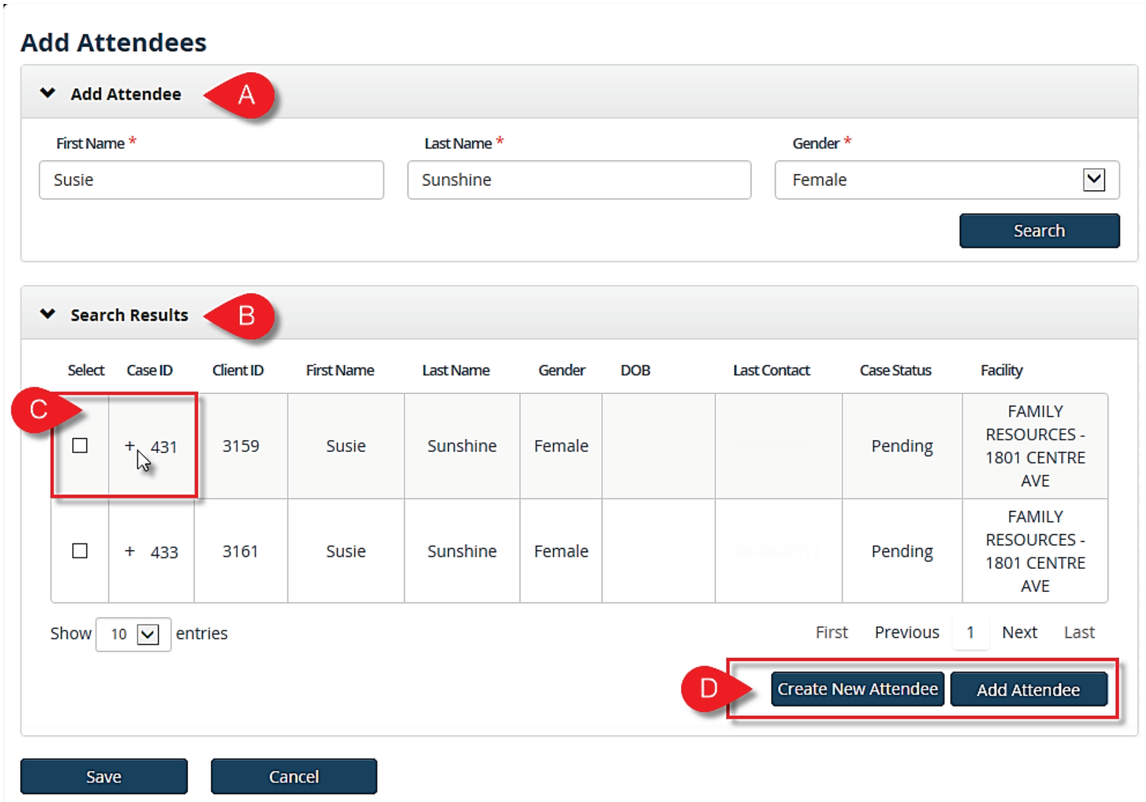
vi. Click **New** to enter a new Facilitator.

vii. To delete a facilitator from the list click the Delete Icon [🗑] to the right of the Facilitator in the *Facilitator Information* grid.

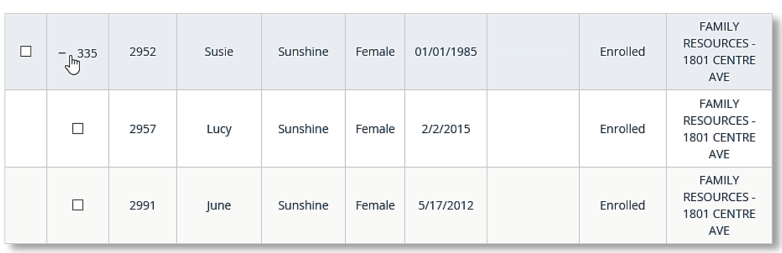


A *Confirm Delete* pop-up will appear: Clicking **Yes** will delete the Facilitator. Clicking **No** will cancel the action and the Facilitator will not be deleted.

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

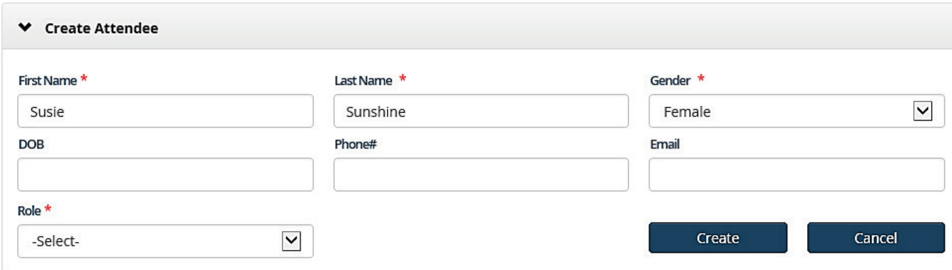


a. Enter the attendee's *First Name*, *Last Name*, select their *Gender* from the drop-down and click **Search**.
b. Review the *Search Results* and determine if the attendee is listed.
c. To view the Household Members of a Case in the *Search Results*, click the plus sign [**+**] to the left of the *Case ID* in the grid to expand the results. Select attendees by checking the checkbox next to each individual who is an attendee.



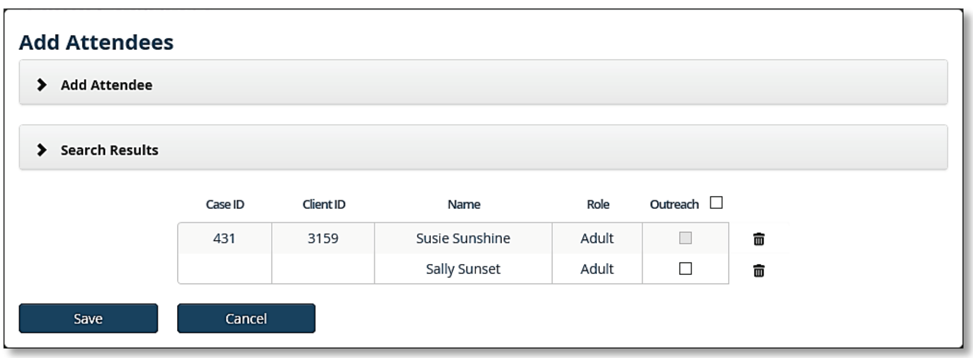
d. To add the selected attendees, click **Add Attendee**.

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



   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*.



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:

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