

## Summary– FSC Job Aid

The *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 *Summary* pane. Home Visiting Referrals can be viewed from this screen and the Home Visiting status can also be updated from this screen.

### Summary

▼ **Summary**

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

<p>Provider *</p> <input style="width: 90%;" type="text"/>	<p>Facility *</p> <input style="width: 90%;" type="text"/>		
<p>Case Name *</p> <input style="width: 90%;" type="text"/>	<p>Enrollment Status *</p> <input style="width: 90%;" type="text" value="-Select-"/>	<p>Assigned Worker</p> <input style="width: 90%;" type="text" value="-Select-"/>	<p>Home Visiting Status <span style="font-size: small;">i</span></p> <input style="width: 90%;" type="text" value="-Select-"/>
<p>Case ID</p> <input style="width: 90%;" type="text"/>	<p>Status Date</p> <input style="width: 90%;" type="text"/>	<p>Assignment Date</p> <input style="width: 90%;" type="text"/>	<p>Home Visiting Date</p> <input style="width: 90%;" type="text"/>

Save   Snapshot Report

▼ **Next Steps**

 Home Visiting Portal	 FAST Assessment
 Add Contact	 Ages and Stages
 View Case Plan	Family's Interests

### 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.

## Summary Pane

- The ▼ Summary pane will be displayed at the top of every Case screen and contains the following information:

- Provider*: This will display the Provider agency where this case was opened.
- Facility*: This will display the specific Facility (location) where this case is assigned.
- Case Name* and *Case ID*: The case name will default to the Head of Household's last name but can be edited. This is the FSC Case number and is not editable.
- Enrollment Status* and *Status Date*: Cases start in "Pending" status. To enroll a case select "Enrolled" from the drop-down. To close a Case select "Closed" from the drop-down. When the status is changed to "Enrolled" the *Status Date* must be entered.
  - The History Icon [ ] next to the *Enrollment Status* drop-down, when clicked, will open the *Enrollment Status History* pop-up. This pop-up contains the history of the Case including all prior statuses for the Case including the date and time of each status change.

Enrollment Status History				
Enrollment Status	Enrollment Date	Closure/Not Interested Reason	Updated Date	LastUpdatedID
Enrolled	04/24/2017		4/24/2017 1:51:24 PM	Davis, Amber
Pending			4/24/2017 10:21:18 AM	Davis, Amber

Cancel      First   Previous   1   Next   Last

To close the *Enrollment Status History* pop-up, click Cancel.

- e. **Assigned Worker and Assignment Date:** Supervisors and Managers can select a worker to assign from the drop-down. Once a worker has been assigned the *Assignment Date* must also be entered.
  - i. The History Icon [ 🕒 ] next to the *Assigned Worker* drop-down, when clicked, will open the *Assignment History* pop-up. This pop-up contains the history of all prior assignments to the Case including the *Start Date* and *End Date* of each assignment episode.

Assignment History			
Worker Name	Assignment Date	Updated Date	
Chimes, Dan	04/24/2017	4/24/2017 1:51:25 PM	
Davis, Amber	04/24/2017	4/24/2017 10:21:18 AM	

Cancel First Previous 1 Next Last

To close the *Assignment History* pop-up, click .

- f. **Home Visiting Status and Home Visiting Date:** If this Case has a Home Visiting Referral associated with it this status must be updated using the drop-down. If the Home Visiting Status is "Enrolled" the date of Home Visiting enrollment must be entered in the *Home Visiting Date* field.
  - i. The Home Visiting Status drop-down has an informational pop-up to assist users in selecting the correct Status. To view the informational pop-up, move the mouse over the Information Icon [ ⓘ ].

Home Visiting Status ⓘ 🕒

Description of the Home Visiting Statuses:	
Pending	Default status when a new referral is sent to your program
In Progress	Program representative reaches out to the client and/or begins working on the referral
Waitlist	Client is conditionally accepted to the program but there is a waitlist for the program
Enrolled	Referral is accepted and client is enrolled in the program
Close Case	Client leaves and/or completes the program
Follow - Up	Family potentially intertested but not right now

- ii. The History Icon [ 🕒 ] next to the *Home Visiting Status* drop-down, when clicked, will open the *Home Visiting Status History* pop-up. This pop-up contains the history of all prior Home Visiting Statuses on the Case.

Home Visiting Status History						
Home Visiting Status	Status Date	Closure/Not Interested Reason	Notes	Updated Date	LastUpdatedID	
In Progress				04/24/2017 1:51:24 PM	Amber Davis	

Cancel First Previous 1 Next Last

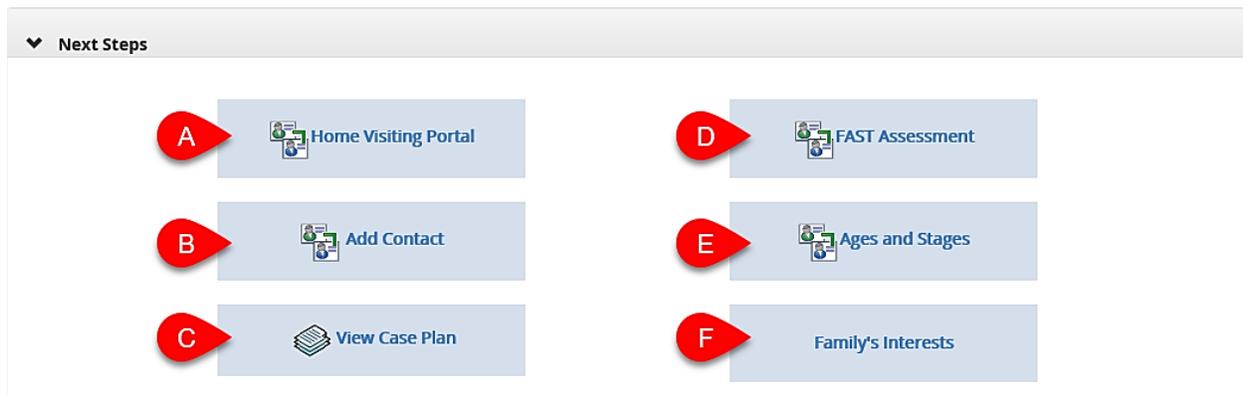
- g. Once the Summary pane's information has been completed or updated, click  to preserve the information entered or updated.

**TIP:** The Summary pane can only be edited from the Summary screen.

- h. Clicking  will open a PDF in a new window or tab. This PDF will display information about the case including:
- i. *Household*: List of current Household Members from the Household Info screen.
  - ii. *Education*: Education information for the Household Members from the  tab on the **Education** screen.
  - iii. *Income*: Income information for all Household members as documented on the **Demographics** screen.
  - iv. *Insurance*: Insurance information for all Household members as documented on the **Demographics** screen.
  - v. *Pregnancy*: Pregnancy information as documented on the  tab of the **Health** screen.
  - vi. *Supports*: A list of active Supports as documented on the **Supports** screen.
  - vii. *FAST Assessment*: The Summary Report of the latest FAST Assessment.

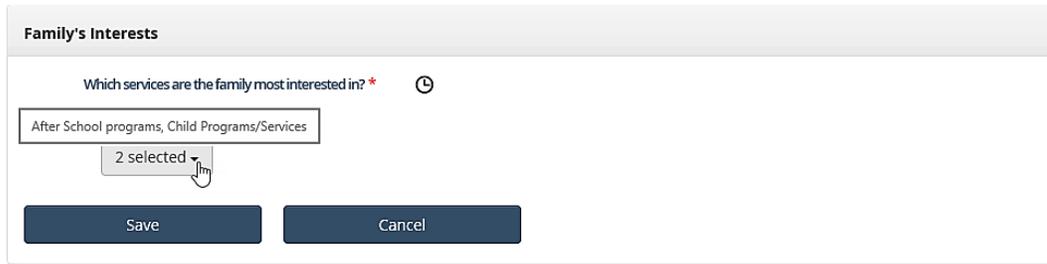
## Next Steps Pane

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



- a. *Home Visiting Portal*: If there is a Home Visiting Referral, clicking this button will open a PDF of the referral from the Home Visiting Portal.
- b. *Add Contact*: Clicking this button navigates the user to the **Contacts** screen.

- c. *View Case Plan*: Clicking this button navigates the user to the **Plans** screen.
- d. *FAST Assessment*: Clicking this button navigates the user to the **Assessments** screen.
- e. *Ages and Stages*: Clicking this button navigates the user to the **Assessments** screen.
- f. *Family's Interests*: Clicking this button opens the Family's Interests pop-up:



- i. Which services are the family most interested in?: Select all that apply from the multi-select drop-down. Selected items can be viewed by moving the mouse over the drop-down.
- ii. Click  to save the selections. Clicking  will close the pop-up without saving the selections.
- iii. The History Icon [  ], when clicked, will open the *Family's Interests History* pop-up. This pop-up contains the history of all prior selections and includes the date the selections were made and the worker who made the selections.



Family's Interests selections	LastUpdated Date	LastUpdated ID
After School programs, Assessment of baby's growth, Clothing	4/24/2017 3:33:58 PM	Amber Davis
After School programs, Assessment of baby's growth	4/24/2017 3:33:46 PM	Amber Davis

To close the *Family's Interests History* pop-up, click  .



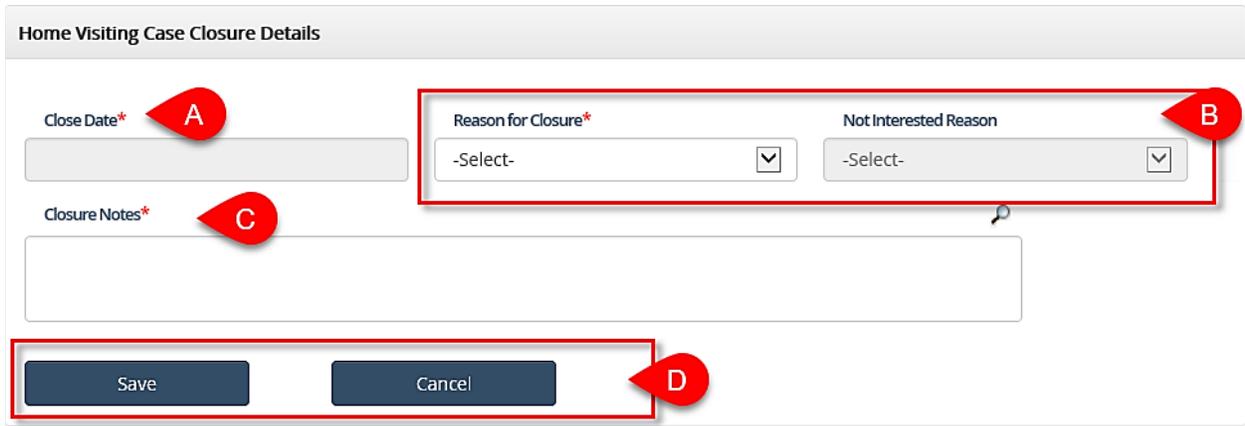
**Home Visiting Statuses and Home Visiting Closure**

1. Home Visiting Status options and actions:

Status	Definition	Next Actions for Provider to Complete
<b>Pending</b>	The default status when a Home Visiting Referral is sent to a program.	Review and update the Referral's status.
<b>Waitlist</b>	Select this status when the Client is conditionally accepted to the program but there is a waitlist for the program.	Update the Referral's status when the Client/Family leaves the Waitlist.
<b>In Progress</b>	Select this status while a program representative reaches out to the client and/or begins working on the Referral.	Update the Referral's status when it has been determined whether the Client is Enrolled/Not Enrolled or placed on the Follow Up list.
<b>Enrolled</b>	Select this status when the Client is enrolled in the Home Visiting program and enter the date of enrollment in the <i>Home Visiting Date</i> field.	Update the Referral's status when the Home Visiting Referral has closed. If this is a <b>Medical</b> Home Visiting Referral, and the client gives permission, the <b>Follow Up form must be sent to the Referral Source.</b>
<b>Follow Up</b>	Select this status when the Client/Family is potentially interested but not right now.	Update the Referral's status when the Client is re-engaged or when it has been determined that the client will not be enrolled.
<b>Not Interested</b>	Select this status when the Client is not interested in the Home Visiting program.	Complete the <i>Home Visiting Case Closure Details</i> pop-up.
<b>Closed</b>	Select this status when the Client has left and/or completed the Home Visiting program.	Complete the <i>Home Visiting Case Closure Details</i> pop-up. If this is a <b>Medical</b> Home Visiting Referral, and the client gives permission, the <b>Follow Up form must be sent to the Referral Source.</b>

After updating the status in the ▼ Summary pane, click Save.

2. *Home Visiting Case Closure Details*: This pop-up will open if “Not Interested” or “Closed” statuses are entered.



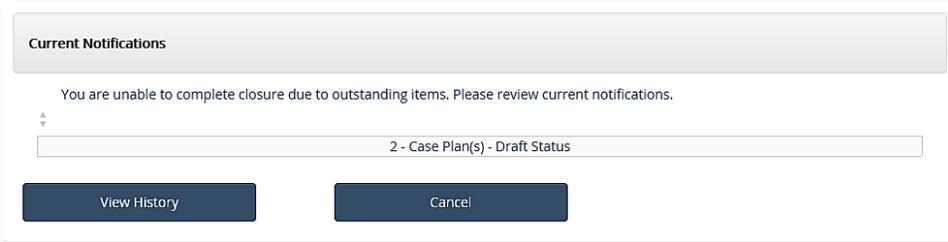
- a. *Close Date*: The date defaults to the date the status has been updated.
- b. *Reason for Closure* or *Not Interested Reason*: Select the *Reason for Closure* (if the Status is “Closed”) or the *Not Interested Reason* (if the Status is “Not Interested”)
- c. *Closure Notes*: Enter any notes regarding the Home Visiting closure in the narrative box.
- d. Click **Save** to save the information entered and close the Home Visiting Referral. Clicking **Cancel** will close the pop-up without saving the information entered and the Home Visiting Referral will not be closed.

## Closing the Case

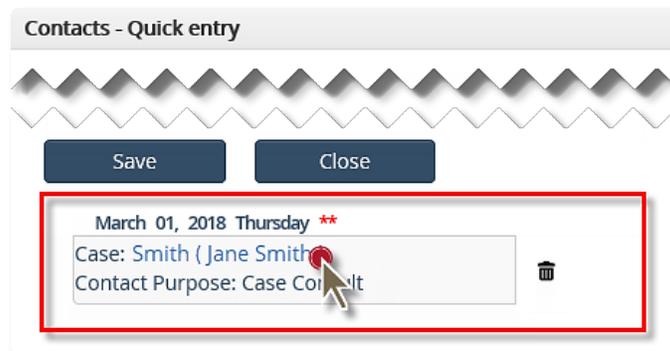
1. Start the closure process by clicking on the Closure Validation Folder Icon [  ] above the **Case Summary** pane.



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



- a. Click  to close the *Current Notifications* pop-up.
  - b. Clicking  will display the *Override History* for this Case.
3. The following unresolved items may prevent closure:
    - a. **Case Plans** with statuses of: *Draft, In Progress, or Rejected*.  
[ [Case Plan Job Aid](#) ]
    - b. **Assessments** with statuses of: *Draft, In Progress, or Rejected*.  
[ [Assessments: FAST Job Aid](#) ]
    - c. **Contacts** with statuses of: *In Progress, or Rejected*.  
[ [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](#) ]



- Once all unresolved items have been completed select "Closed" from the *Case Status* drop-down in the **Case Summary** pane and click **Save**. If there are still unresolved items the *Current Notifications* pop-up will appear instead of the *Case Closure Details* pop-up.

**Reminder:** The Case cannot be closed unless the *Home Visiting Status* is either "Closed" or "Not Interested".

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

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

- 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.  
OR  
*Not Interested Reason*: If the Case has not yet been accepted it can be closed with an *Enrollment Status* of "Not Interested". If the *Enrollment Status* is "Not Interested", select the *Not Interested Reason* from the drop-down.



- c. *Closure Notes*: Enter any relevant notes about the case closure.
- d. Clicking  will close the Case.
- e. Clicking  will close the *Case Closure Details* pop-up without closing the Case; information entered will not be saved.

**NOTE:** *If the Home Visiting Status is being updated at the same time as the Enrollment Status, then the Home Visiting Closure Details will be included in the pop-up along with the Case Closure Details.*

### Re-Opening a Case

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

The screenshot shows a 'Summary' pane for a case. At the top, it says '\*Denotes Required Fields \*\* Denotes Half Mandatory Fields Ctrl + Click to Multi-Select and Deselect'. Below this are several input fields: 'Provider \*', 'Facility \*', 'Case Name \*', 'Enrollment Status \*' (set to 'Closed'), 'Assigned Worker', 'Home Visiting Status' (set to '-Select-'), 'Case ID', 'Status Date \*', 'Assignment Date \*', and 'Home Visiting Date'. At the bottom of the pane are three buttons: 'Save', 'Reopen' (which is highlighted with a yellow mouse cursor), and 'Snapshot Report'.

### 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>