DEPARTMENT OF HUMAN SERVICES
ALLEGHENY COUNTY, PENNSYLVANIA

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HOMELESS CASE MANAGEMENT

Assessments: FAST – HCM Job Aid

The *Prep/FAST* allows users to document the Family Advocacy and Support Tool (FAST) Assessment as well as any Prep sessions that occurred. The Prep/FAST must be completed every 6 months.

Family Advocacy and Support Tool

Session Time out in 03:52

Jane Smith ▾

> Assessment

> Individual List

> Optional Documented Information

⌄ Domains

| Social History/Prep | Family Together | Child | Caregiver | IPV | UNCOPE |

⌄ Print

◉ Full Report   All selected ▾

○ Summary Report   All selected ▾

Print

Navigation

1. From the Dashboard :
   a. Locate the desired Case and click on the Case ID to bring the Case into focus. The *Summary* screen will open.
   b. Click on the ⌄ Tracking tile. Then click on the Assessments ❯ tile.

2. From within the Case:
   a. Click on the ⌄ Tracking tile. Then click on the Assessments ❯ tile.

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Assessments list screen

1. [❤ Case Assessments] pane:

Case Assessments

	ID	Assessment Date	Assessment Type	Assessor	Status	Projected Assessment Date	
+	372632	8/3/2018	Prep/FAST - Caregiver Only	Caldwell, James	Draft	01/30/2019	
-	372630	8/1/2018	Prep/FAST - Caregiver Only	Caldwell, James	Submitted		

Respondent Details:

MCI ID	Name	DOB	Gender
1000914302	James Iguana	1/1/1980	Male

a. To start documenting a new FAST Assessment, click on [New Assessment] above the *FAST Assessment* grid. This button will change to [Update] once the first Assessment has been finalized.

b. To view or update an existing FAST, click on the *Assessment Date* of the desired FAST in the *FAST Assessment* grid.

c. To view the *Respondent Details* from the grid, click on the [**+**] to the left of the desired FAST in the grid. To close the *Respondent Details* view, click on the [**-**] that now appears to the left of that FAST in the grid.

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Prep/FAST Assessment screen - Overview

1. Prep/FAST – Overview:

a. The *Session Time out* clock will be visible in the top-right corner of the screen. This shows how much time is left before the application automatically logs out.

b. The User Menu will display the logged in user's name. To return to the ⟨ **Assessments** ⟩ screen in Synergy, click on the down arrow [▼] in the menu and select "Back to HCM". Please be sure to save your work before returning to HCM - Synergy.

c. ⟨ **Assessment** ⟩ : This pane allows users to document the *Assessment Date* and *Assessment Type*. The Assessment can also be sent for approval from this pane.

d. ⟨ **Individual List** ⟩ : This pane allows users to select clients and collateral to include in the Assessment.

e. ⟨ **Optional Documented Information** ⟩ : This pane allows users to document information that is not already included in the Domains.

f. ⟨ **Domains** ⟩ : This pane contains all of the navigation buttons for each domain.

g. ⟨ **Print** ⟩ : This pane allows the user to generate a printable PDF version of the Assessment.

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Assessment Basics and Navigation

1. Basics:
   a. The ratings from the last Assessment will carry over to the next Assessment if the last Assessment was documented and approved less than 1 year ago.
   b. Definitions of the ratings will be listed at the top of each pane. Hovering the mouse over a radio button **[◉]** will also display the rating definition for that selection.
   c. Some items, depending on what rating is selected, may cause additional questions or drop-downs to appear below the item.
   d. Some ratings require a justification to be entered in the *Description* box. If a justification for the rating is required a red asterisk **[*]** will appear to the right of the *Description* narrative box.
   e. Rating an item as "Explore" means that there is not enough information currently to accurately rate that item. All items will initially default to "Explore".

2. Navigation:
   a. The Assessment pane must be completed first before the rest of the Assessment can be documented.
   b. The Domains pane contains navigation buttons for the Prep/FAST. Clicking on a navigation button will open that Domain's pane below.

   c. **Save** each section before navigating to another section. If the section has saved successfully a **... Saved Successfully** message will appear at the top of the screen.

   d. The **Child**, **Caregiver**, **IPV**, and **UNCOPE** Domains require every individual to be documented separately. To document for an individual, first select that individual's name in the drop-down that appears below the Domains pane.
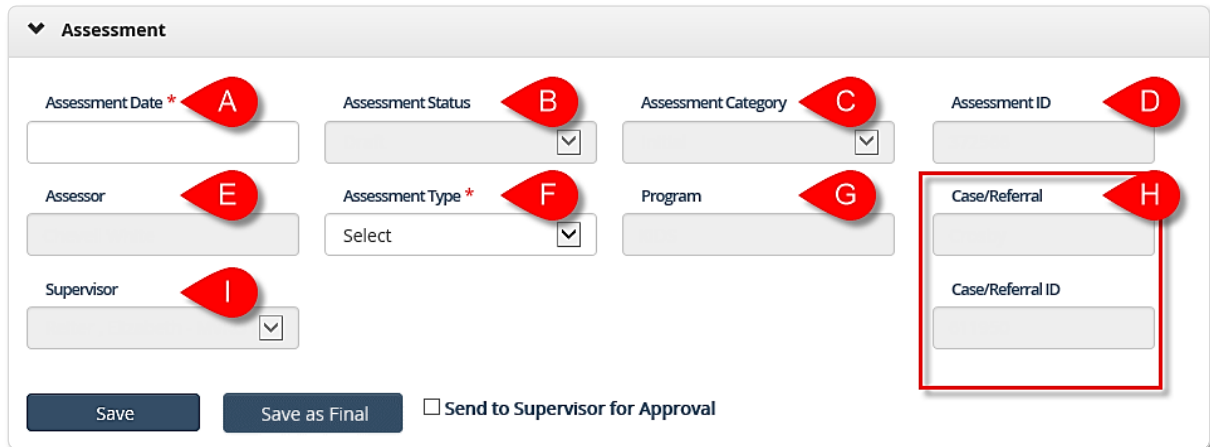

   If everything is grey and the **Save** button is inactive, check to make sure that you have selected an individual from the drop-down.

   Important Note: Remember to click **Save** before moving on and selecting a different individual from the drop-down.

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Assessment Pane

1. The [⌄ Assessment] pane contains some basic information about the Assessment. This is also where the Assessment is saved and sent for approval.

   a. *Assessment Date*: Enter the date the FAST Assessment was conducted with the family. Note: The date will automatically default to today's date and will need to be changed if the actual Assessment date is different.
   b. *Assessment Status*: Displays the current approval/finalized status for this Assessment.
   c. *Assessment Category*: Indicates whether or not this is the Initial Assessment or a re-assessment.
   d. *Assessment ID*: This is the ID assigned to this Assessment by the Synergy system.
   e. *Assessor*: Displays the name of the user who completed the Assessment.
   f. *Assessment Type*: Select the type of FAST from the drop-down. If "Prep/FAST – Caregiver Only" is selected the [Child] Domain will not be required.
   g. *Program*: Displays the program where the Assessment was created.
   h. *Case/Referral* and *Case/Referral ID*: These fields will display the Case/Referral name and the Case/Referral ID.
   i. *Supervisor*: If the ☑ *Send to Supervisor for Approval* checkbox is checked this drop-down will be enabled. The user can then select the name of their Supervisor and click [Save as Final] to send the Assessment for approval. If supervisor approval is not required, clicking [Save as Final] will finalize the Assessment.

2. Once the [⌄ Assessment] pane has been completed, click [Save] to enable the rest of the Assessment.

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Individual List Pane

1. **❮ Individual List** : This pane contains a listing of the individuals who are included in the Assessment. Both clients and supports can appear here.

    ❮ Individual List

Select				
Individual	**Relation**	**Individual Type**	**Team Member**	
Susie Smith (2/12/2004 - Female)	Child	Child ▾	☐	
Sally Smith (8/22/2001 - Female)	Child	Child ▾	☐	
Sam Smith (1/1/1981 - Male)	Father	Caregiver ▾	☐	
Sandy Smith (1/20/1981 - Female)	Mother	Caregiver ▾	☐	

2. Click on the **Select** button to open the *Select Individuals* pop-up.

    Select Individuals

☐	A	**Individual**	**Relation**	B	**Individual Type**	C	**Team Member**
☑		Susie Smith (2/12/2004 - Female)	Child		Child ▾ *		☐
☑		Sally Smith (8/22/2001 - Female)	Child		Child ▾ *		☐
☑		Sam Smith (12/12/1969 - Male)	Other		Select ▾ *		☐
☑		Sandy Smith (6/26/1978 - Male)	Other		Select ▾ *		☐
☐		Janet Jones (1/20/1981 - Female)	Other		Caregiver ▾		☐

Save	Close

    a. Select all of the individuals who are included in this Assessment using the checkboxes to the left of the individual's name. If all of the listed individuals should be included, click the checkbox above the grid to select everyone at once.

    b. For each selected individual, use the *Individual Type* drop-down to indicate whether the person is a child, caregiver, or both.

    c. If the selected individual is also a Team Member, check their checkbox in the *Team Member* column to the right of the individual in the grid.

    d. Click **Save** to complete your selection and close the pop-up.

        Clicking close will **Close** the pop-up without saving any selections or changes.

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Optional Documented Information Pane

1. **˅ Optional Documented Information** : This pane can be used to document any additional information that applies to this family for the FAST Assessment. Check the checkbox next to each applicable item and then enter the information for that item in the narrative field to the right.

2. Once the information has been completed click **Save** .
    A **Notes data saved successfully.** message will appear at the top of the screen to indicate that the information has been saved.

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Social History/Prep Domain

1. Click on the **Social History/Prep** navigation button in the **⌄ Domains** pane.

⌄ Domains					
Social History/Prep	Family Together	Child	Caregiver	IPV	UNCOPE
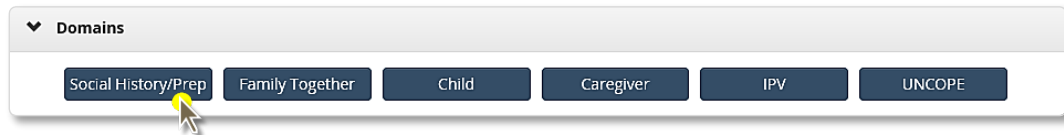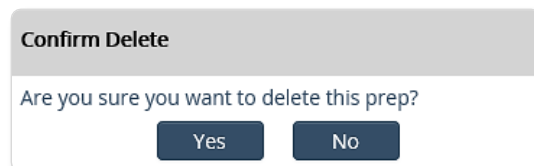
2. **⌄ Prep History** : This pane allows users to document the family's social history/story and any Meeting Prep sessions that have occurred.

   a. *Social History/Family Story*: Enter the section will remain open and editable at the top of the pane no matter what Meeting Prep is in focus below it.
   b. Viewing or Editing: To view or edit an existing Meeting Prep, click on the desired Meeting Prep hyperlink in the grid; for example: **Prep 1**.
   c. Create New or Delete:
      i. To start documenting a new Meeting Prep, click the **New** button below the grid.
      ii. Delete: To delete a Meeting Prep, click on the Meeting Prep hyperlink in the grid to bring the Prep into focus. Then click the **Delete** button below the grid. A *Confirm Delete* pop-up will appear: Clicking **Yes** will delete the selected Prep. Clicking **No** will cancel the action and the Prep will not be deleted.

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3. Completing a Meeting Prep:

a. *Client(s)*: Click [Select] to include the individuals who participated in the Meeting Prep.

   i. A selection pop-up will open. Select all of the individuals who participated in this Meeting Prep using the checkboxes to the right of the individual's role.

   ii. Click [Save] to complete your selection and close the pop-up.

   Clicking close will [Close] the pop-up without saving any selections or changes.

b. *Prep Meeting Date*: Enter the date the Prep Meeting took place.

c. *Location*: Select the location of the Prep Meeting from the *Location* drop-down.

d. Enter information in the narrative fields for the Prep questions and click [Save].

   i. The user should receive the **Prep information saved successfully.** message at the top of the screen before continuing on.

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Family Together Domain

1. Click on the [Family Together] navigation button in the [∨ Domains] pane.

> ∨ **Domains**
>
> | Social History/Prep | Family Together | Child | Caregiver | IPV | UNCOPE |

2. [∨ Family Together] :

> ∨ **Family Together**
>
> 0 = No evidence of Problems   1 = Let's Watch, Mild   2 = Help Needed, Moderate   3 = Immediate Help, Severe
> E = Explore

	0	1	2	3	E	Description
Parental/Caregiver Collaboration	○	⦿	○	○	○	
☐ Item of Disagreement?						
Family Functioning	○	○	○	⦿	○	*
Family Safety	○	○	○	○	⦿	
Financial Resources	○	○	○	○	⦿	
Residential Stability	○	○	○	○	⦿	
Transportation	○	○	○	○	⦿	
Involvement in Services	○	○	○	○	⦿	

> [Save]

   a. Rate each item using the scale at the top of the [∨ Family Together] pane. All items will initially default to "Explore".

   b. Enter the *Description* for items as needed.

      i. If the rating is **1** the ☐ *Item of Disagreement?* checkbox will appear. If the answer is yes, then check the checkbox for this item.

      ii. If the rating is a **2** or **3** the *Description* field will become mandatory.

   c. Once the [∨ Family Together] pane has been completed click [Save].

      i. The user should receive the **Family Together Domain was saved successfully.** message at the top of the screen before continuing on.

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Child Domain

1. Click on the [Child] navigation button in the [⌄ Domains] pane.

> ⌄ **Domains**
>
> Social History/Prep   Family Together   Child 🔆   Caregiver   IPV   UNCOPE

2. [⌄ Child] : Select a child from the drop-down to document their Strengths, Needs, and Trauma Experiences.

> ⌄ **Child**
>
> Susie Smith (2/12/2004 - Female) - Child   ⌄

3. [⌄ Child Strengths] :

> ⌄ **Child Strengths**
>
> 0 = Strong, Centerpiece   1 = Good   2 = Identified/Potential   3 = Not Yet Identified
> E = Explore

	0	1	2	3	E	Description	
Interpersonal Skills	○	⦿	○	○	○	🔍	*
Talents and Interests	○	○	○	○	⦿	🔍	
Resiliency	○	○	○	○	⦿	🔍	
Spirituality	○	○	○	○	⦿	🔍	
Cultural Identity	○	○	○	○	⦿	🔍	
Natural Supports	○	○	○	○	⦿	🔍	
Educational/Vocational	○	○	○	○	⦿	🔍	

a. Rate each item using the scale at the top of the [⌄ Child Strengths] pane. All items will initially default to "Explore".

b. Enter the *Description* for items as needed. If the rating is a **1** the *Description* field will become mandatory.

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4. ❯ Child Needs :

Child Needs

	0 = No evidence of Problems	1 = Let's Watch, Mild		2 = Help Needed, Moderate	3 = Immediate Help, Severe
E = Explore					

	0	1	2	3	E	Description	
Relationship with Caregivers	○	○	○	◉	○		*
Social Functioning	○	○	○	○	◉		
School	○	○	◉	○	○		*
None selected ▾ *							
Physical/Medical	○	○	○	◉	○		*
None selected ▾ *							
Mental Health	○	○	○	○	◉		
Intellectual/Developmental	○	○	○	○	◉		
Child High Risk Behaviors	○	○	◉	○	○		*
None selected ▾ *							
Sleep	○	○	○	○	◉		
Justice Involvement	○	○	○	○	◉		
Social Resources	○	○	○	○	◉		
Adjustment to Trauma	○	○	○	○	◉		

a. Rate each item using the scale at the top of the ❯ Child Needs pane. All items will initially default to "Explore".

b. Enter the *Description* for items as needed.
   i. If the rating is **1** the ☐ *Item of Disagreement?* checkbox will appear. If the answer is yes, then check the checkbox for this item.

   ii. If the rating is a **2** or **3** the *Description* field will become mandatory.

   iii. If *School*, *Physical/Medical*, or *Child High Risk Behaviors* are rated **2** or **3** a multi-select drop-down will appear. Select all of the applicable options that lead to the rating.

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5. ❯ Child – Trauma Experiences :

a. *Trauma Conversation*: Enter what was discussed or the reason why the conversation did not occur.

b. *Trauma Experiences*: Select all trauma experiences that apply to the child. If there are no trauma experiences to document, select the last option "No Trauma Indicated".

c. Once all of the [❯ Child] panes have been completed click [Save].

   i. The user should receive the [Child Domain was saved successfully.] message at the top of the screen before continuing on.

> **NOTE:** *If there is more than one child, each child's Child Domain must be completed separately.*
> *Don't forget to click* Save *before selecting the next child in the drop-down.*

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Caregiver Domain

1. Click on the **Caregiver** navigation button in the ❤ Domains pane.

   ❤ **Domains**

   | Social History/Prep | Family Together | Child | Caregiver | IPV | UNCOPE |

2. ❤ **Caregivers** : Select a caregiver from the drop-down to document their Strengths, Needs, and Trauma Experiences.

   ❤ **Caregivers**

   Sam Smith (1/1/1981 - Male) - Father

3. ❤ **Caregiver Strengths** :

   ❤ **Caregiver Strengths**

   | 0 = Strong, Centerpiece | 1 = Good | | | 2 = Identified/Potential | | 3 = Not Yet Identified | |
   | E = Explore | | | | | | | |

	0	1	2	3	E	Description	
Community Connections	○	⦿	○	○	○		*
Talents and Interests	○	○	○	○	⦿		
Resiliency	○	○	○	○	⦿		
Spirituality	○	○	○	○	⦿		
Cultural Identity	○	○	○	○	⦿		
Natural Supports	○	○	○	○	⦿		

   a. Rate each item using the scale at the top of the ❤ Caregiver Strengths pane. All items will initially default to "Explore".

   b. Enter the *Description* for items as needed. If the rating is a **1** the *Description* field will become mandatory.

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4. **❤ Caregiver Needs** :

❤ Caregiver Needs

0 = No evidence of Problems	1 = Let's Watch, Mild		2 = Help Needed, Moderate		3 = Immediate Help, Severe	
E = Explore						

	0	1	2	3	E	Description
Supervision	○	◉	○	○	○	
☐ Item of Disagreement?						
Caregiver Functioning	○	○	○	○	◉	
Emotional Responsiveness	○	○	○	○	◉	
Employment/Education	○	○	○	○	◉	
Social Resources	○	○	○	○	◉	
Mental Health	○	○	○	○	◉	
Substance Use	○	○	○	○	◉	
Intellectual/Developmental	○	○	○	○	◉	
Physical/Medical	○	○	◉	○	○	*
None selected ▾ *						
Legal	○	○	○	○	◉	
Adjustment to Trauma	○	○	○	○	◉	

a. Rate each item using the scale at the top of the **❤ Caregiver Needs** pane. All items will initially default to "Explore".

b. Enter the *Description* for items as needed.
   i. If the rating is **1** the ☐ *Item of Disagreement?* checkbox will appear.
      If the answer is yes, then check the checkbox for this item.

   ii. If the rating is a **2** or **3** the *Description* field will become mandatory.

   iii. If *Physical/Medical* is rated **2** or **3** a multi-select drop-down will appear.
      Select all of the options that lead to the rating.

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5. ❯ Caregiver – Trauma Experiences :

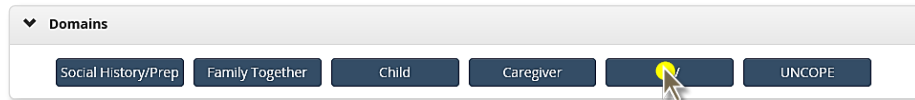a. *Trauma Conversation*: Enter what was discussed or the reason why the conversation did not occur.

b. *Trauma Experiences*: Select all trauma experiences that apply to the caregiver. If there are no trauma experiences to document, select the last option "No Trauma Indicated".

c. Once all of the ❯ Caregiver panes have been completed click **Save**.

    i. The user should receive the **Caregiver Domain was saved successfully.** message at the top of the screen before continuing on.
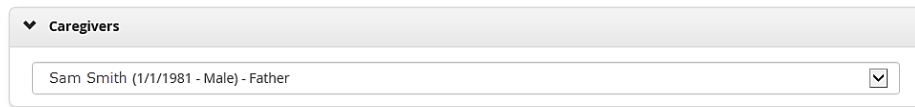
> **NOTE:** *If there is more than one caregiver, each Caregiver's Caregiver Domain must be completed separately. Don't forget to click* Save *before selecting the next caregiver in the drop-down.*
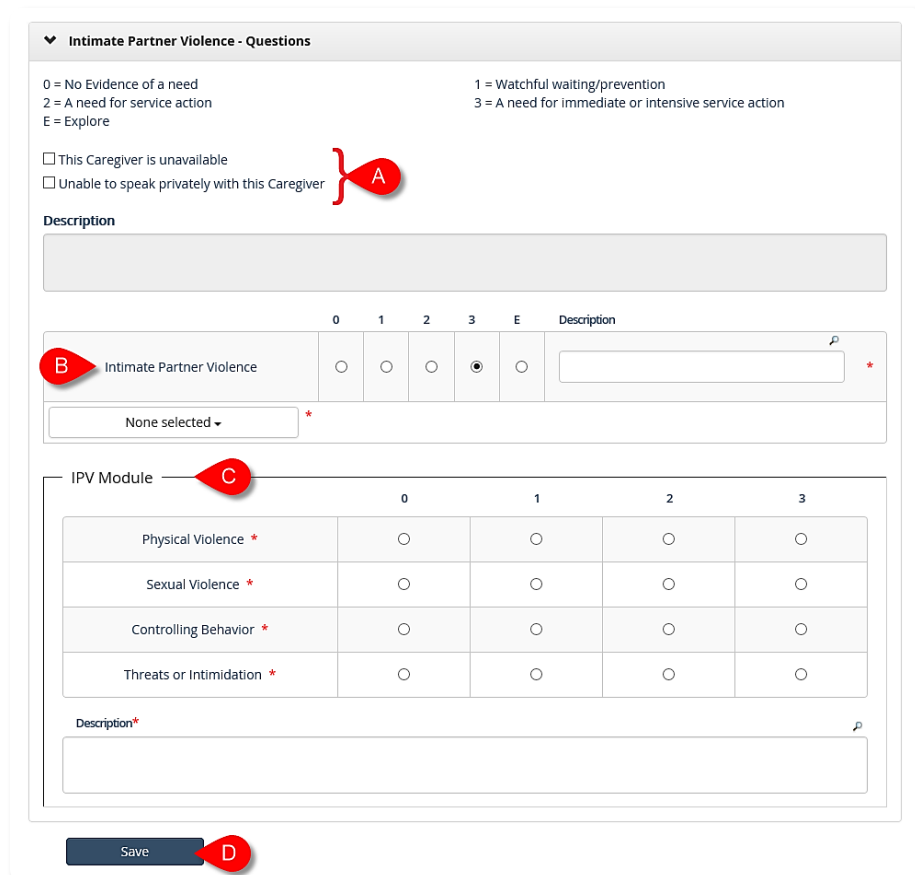
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Intimate Partner Violence Domain

1. Click on the **IPV** navigation button in the **⌄ Domains** pane.

⌄ Domains

| Social History/Prep | Family Together | Child | Caregiver | | UNCOPE |

2. **⌄ Caregivers** : Select an individual from the drop-down to document their IPV information.

⌄ Caregivers

Sam Smith (1/1/1981 - Male) - Father

3. **⌄ Intimate Partner Violence - Questions** :

a. If the caregiver is unavailable or you are unable to speak privately with this caregiver, check the relevant checkbox. If either checkbox is checked, use the *Description* field to explain the selection.

☐ *This Caregiver is unavailable*

☐ *Unable to speak privately with this Caregiver*

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b. *Intimate Partner Violence*: If you are able to speak with the caregiver privately, rate the IPV risks/concerns using the scale at the top of the pane.

  i. If **1**, **2**, or **3** are selected the *IPV Module* will become active and a multi-select drop-down will appear. Indicate whether the caregiver is a *Perpetrator*, *Victim* or both using the checkboxes.
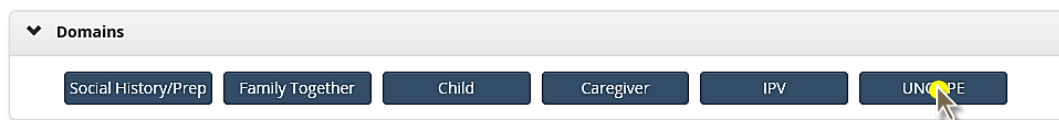
All selected ▾

☑ Perpetrator
☑ Victim

c. *IPV Module*: Using the scale at the top of the pane, rate each item in the *IPV Module*. Enter further details in the *Description* field.

d. Once all of the [❤ IPV] panes have been completed click [Save].

  i. The user should receive the [IPV Domain was saved successfully.] message at the top of the screen before continuing on.

NOTE: If there is more than one caregiver, each Caregiver's IPV Domain must be completed separately.
Don't forget to click Save before selecting the next caregiver in the drop-down.

UNCOPE Domain

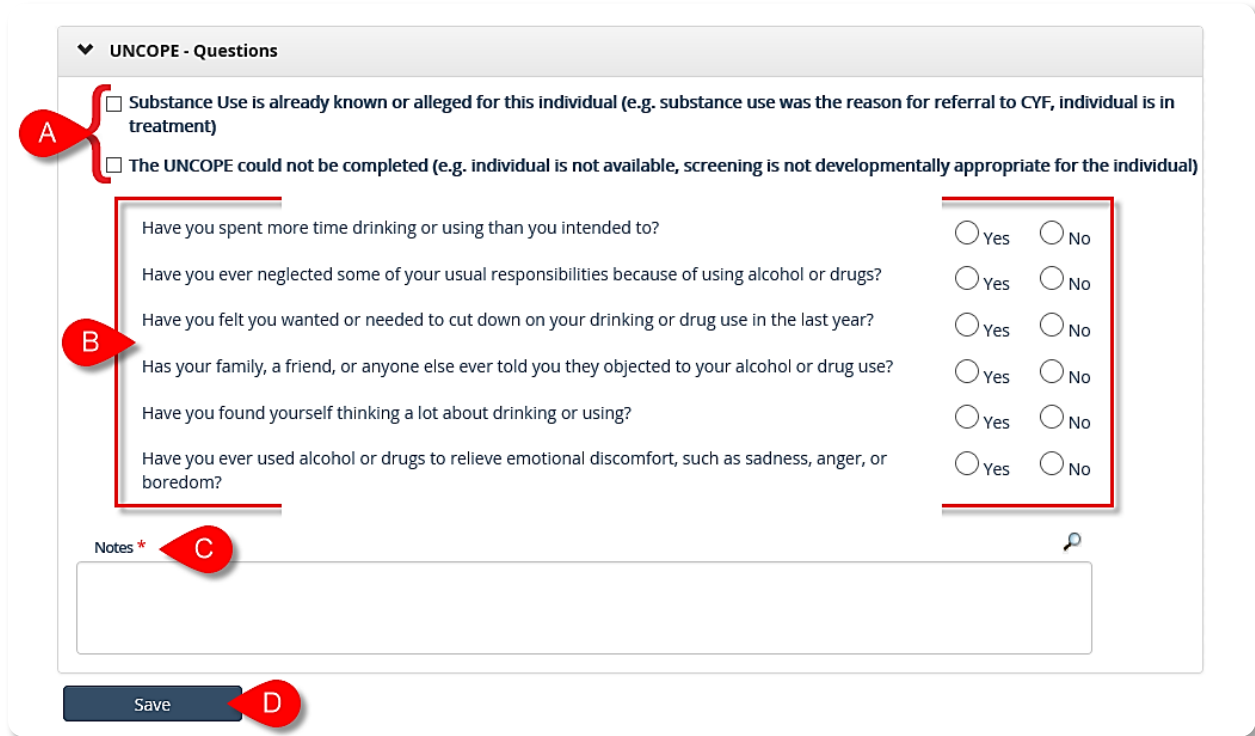1. Click on the [UNCOPE] navigation button in the [❤ Domains] pane.

❤ Domains

[Social History/Prep] [Family Together] [Child] [Caregiver] [IPV] [UNCOPE]

2. [❤ UNCOPE]: Select an individual from the drop-down to document their UNCOPE information.

❤ UNCOPE

Select ▾

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3. ❤ UNCOPE - Questions :

a. If the individual's Substance Use is already known or the UNCOPE could not be completed, check the relevant checkbox.
    ☐ *Substance Use is already known or alleged for this individual.*
    ☐ *The UNCOPE could not be completed*

b. If neither checkbox is checked, answer the UNCOPE questions using the Yes/No radio buttons. Rate the IPV risks/concerns using the scale at the top of the pane.

c. *Notes*: Enter any additional information in the *Notes* field.

d. Once all of the ❤ UNCOPE panes have been completed click **Save** .
    i. The user should receive the **UNCOPE Domain was saved successfully.** message at the top of the screen before continuing on.

> **NOTE:** *Each individual must have an UNCOPE Domain completed separately for them.*
> *Don't forget to click* Save *before selecting the next individual in the drop-down.*

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Approvals

1. Requesting Approval:

a. In the **Assessment** pane check the ☑ *Send to Supervisor for Approval* checkbox, this will enable the Supervisor drop-down. The user can then select the name of their Supervisor.

b. Click **Save as Final** to send the Assessment for approval or finalize (if approval is not required).

ii. The *Confirm Assessment* pop-up will open: Clicking **Yes** will send the Assessment for approval or finalize it. Clicking **No** will cancel the action and the Assessment will not be sent for approval or finalized.

Confirm Case Assessment

This assessment will be sent to your supervisor for approval. Do you wish to continue?

| Yes | No |

2. Approving or Rejecting an Assessment (Supervisors):

a. Log in to Synergy and go to the **Unapproved FAST Assessment** pane on the **Dashboard**.

b. Click on the Assessment ID to navigate to that specific FAST Assessment.

c. After you have reviewed the Assessment, click on the **Assessment** pane. Using the radio buttons select either: ○ *Accept Assessment* or ○ *Send back Assessment.*

d. *Supervisor Feedback*: If ○ *Send back Assessment* is selected, then enter the required feedback in the narrative field.

e. Click **Save** to approve and finalize the Assessment. The Assessment will be approved, and the screen will automatically navigate back to Synergy.
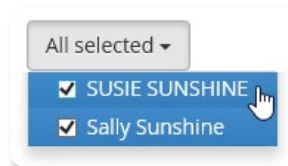
DEPARTMENT OF HUMAN SERVICES
ALLEGHENY COUNTY, PENNSYLVANIA

Homeless
Services
& Supports

HOMELESS CASE MANAGEMENT

Printing

1. The [❯ Print] pane allows the user to generate a printable PDF version of the Assessment.
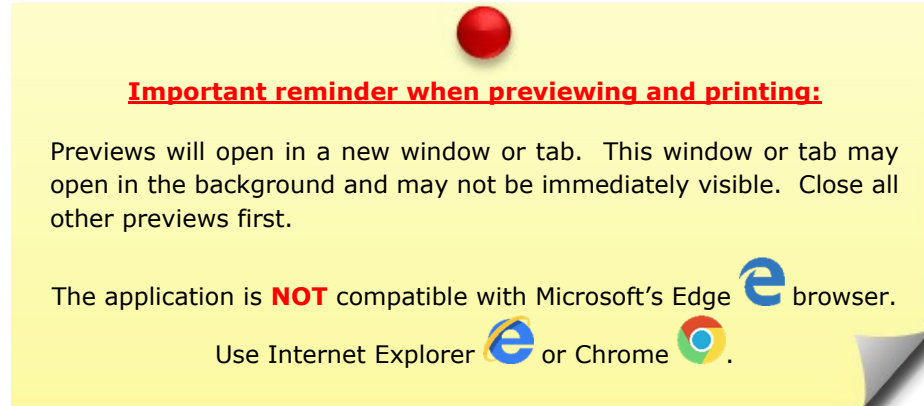
a. Select the *Full Report* or the *Summary Report* using the radio buttons to the left of the Report options. By default, all respondents are selected. Individuals can be selected or de-selected using the checkboxes in the multi-select drop-down.

b. Click [Print] to generate the PDF.

Important reminder when previewing and printing:

Previews will open in a new window or tab. This window or tab may open in the background and may not be immediately visible. Close all other previews first.

The application is **NOT** compatible with Microsoft's Edge browser.

Use Internet Explorer or Chrome .

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 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 or https://alleghenycounty.sharepoint.com/sites/DHSAssist for internal users.