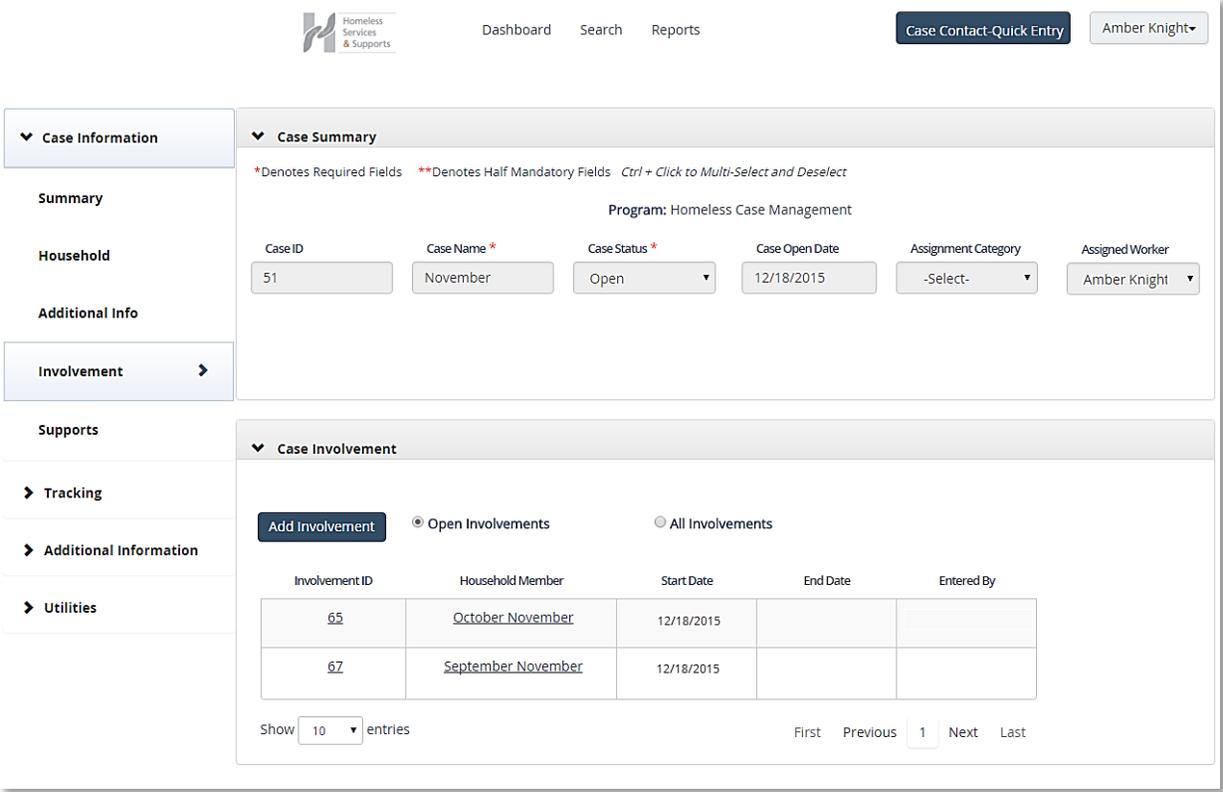




Case Information – Involvement – HCM Job Aid

The Involvement screen allows the user to document the involvements of Household Members in the HCM case. Household Members with closed involvements will not display in other areas of the case such as Contacts and Case Plans.

Case Information – Involvement screen



The screenshot shows the 'Case Information – Involvement' screen. At the top, there is a navigation bar with 'Dashboard', 'Search', and 'Reports'. A 'Case Contact-Quick Entry' button and a user profile 'Amber Knight' are also visible. The main content area is divided into two sections: 'Case Summary' and 'Case Involvement'.

Case Summary: This section includes a legend for required fields (*), half-mandatory fields (**), and a multi-select/deselect function (Ctrl + Click). The program is 'Homeless Case Management'. Below this are input fields for Case ID (51), Case Name (November), Case Status (Open), Case Open Date (12/18/2015), Assignment Category (-Select-), and Assigned Worker (Amber Knight).

Case Involvement: This section has an 'Add Involvement' button and radio buttons for 'Open Involvements' (selected) and 'All Involvements'. It contains a table with the following data:

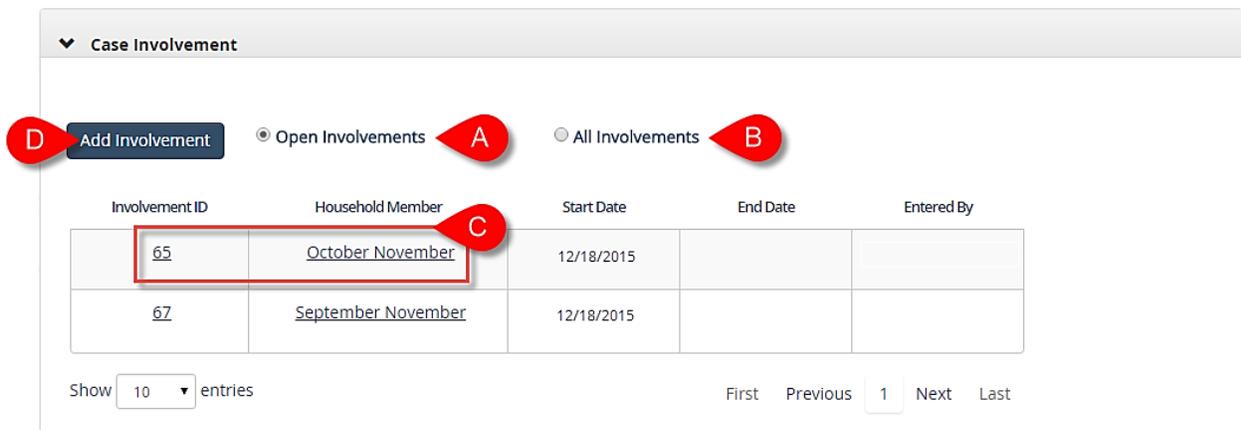
| Involvement ID | Household Member | Start Date | End Date | Entered By |
|----------------|------------------------------------|------------|----------|------------|
| 65 | October November | 12/18/2015 | | |
| 67 | September November | 12/18/2015 | | |

At the bottom of the table, there is a 'Show 10 entries' dropdown and pagination controls: 'First', 'Previous', '1', 'Next', 'Last'.

Accessing the Involvement screen

1. From the **Dashboard**: Locate the desired case and click on the *Case ID* to navigate to the case.
 - a. Navigating from within the case: **Case Information** → **Involvement**

Case Involvement pane



| Involvement ID | Household Member | Start Date | End Date | Entered By |
|----------------|--------------------|------------|----------|------------|
| 65 | October November | 12/18/2015 | | |
| 67 | September November | 12/18/2015 | | |

1. The **Case Involvement** pane allows staff to end or re-open HCM involvements on Household Members. The *Involvement* grid contains the Household Members, their Involvement dates and the name of the staff member who last updated the Household Member's Involvement (*Entered By*).
 - a. *Open Involvements*: The *Involvement* grid defaults to *Open Involvements*. Only Household Members with an open HCM involvement will be displayed in the grid.

Note: A Household Member's Involvement can be started from the **Household** screen if "Involved in Program?" is marked as yes.

- b. *All Involvements*: Select this radio button to display all Household Members, including those with closed HCM involvements.
- c. To view or edit an individual's involvement click on their *Name* or *Involvement ID* in the *Involvement* grid. The *Case Involvement* pop-up will appear.
- d. To add a new involvement to a Household Member click the **Add Involvement** button above the grid. The *Case Involvement* pop-up will appear.

Note: The HCM involvement of the Head of Household cannot be ended. If that individual is no longer the Head of Household their relation to the case must be changed on the Household screen before their Involvement can be ended.

Case Involvement pop-up

Case Involvement

Program

Case ID

Worker *

| | HH Member | Relation | MCI |
|-------------------------------------|----------------------|----------------|------------|
| <input checked="" type="checkbox"/> | OCTOBER NOVEMBER | Self | 1000578697 |
| | September October | Spouse/Partner | 1000579340 |

Start Date *

End Date

1. Using the *Case Involvement* pop-up:

- a. The *Program*, *Case ID*, and *Worker* fields will automatically populate and are not editable.
- b. The HH Member grid contains a list of all of the Household Members including those without an active involvement. The Household Member whose information is being viewed or edited will be highlighted in yellow.
 - i. If no Household Member is highlighted, click on the desired individual in the grid to view or edit their information.
- c. *Start Date*: If the Household Member is already active their start date will be entered and read only. If they are not active the start date will be empty and can be updated. A start date cannot be entered that is either earlier than the case start date or a future date.

Note: *Involvement periods cannot overlap. A person's newest Involvement start date cannot be older than or equal to their last Involvement end date.*

- d. *End Date*: If the Household Member's involvement with HCM is ending (and they are not the Head of Household) enter the *End Date* and click .
- e. To close the *Case Involvement* pop-up without making any changes click .



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 the Self Service Tool go to <http://servicedesk.alleghenycounty.us>