DEPARTMENT OF HUMAN SERVICES
ALLEGHENY COUNTY, PENNSYLVANIA

Homeless
Services
& Supports
HOMELESS CASE MANAGEMENT

Case Information –Summary – HCM Job Aid

The Case 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 where a Supervisor can close a case or change the assigned worker.

Case Summary Screen

Accessing the Summary Screen

1. Summary can be found under Case Information and can be accessed several ways:
   a. From the Dashboard : Locate the desired case and click on the *Case ID*.
      The Summary pane opens automatically.
      i. Clicking on the the *Case ID* in any grid will navigate the user to Summary .
   b. Navigating from within the case:
      i. Case Information → Summary

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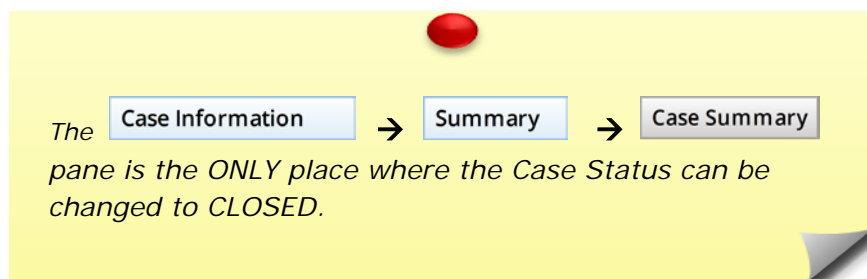
Case Summary pane

Case Summary

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

Program: Homeless Case Management

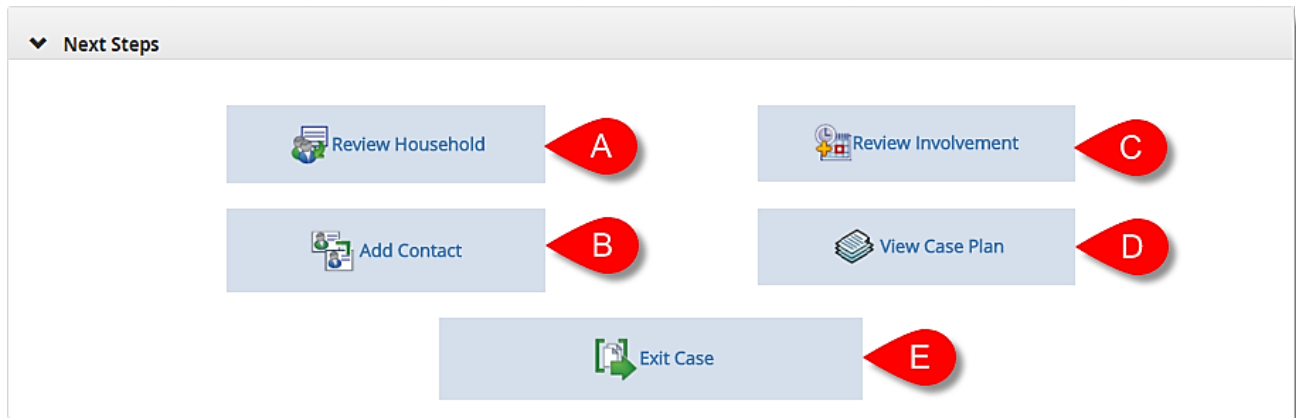| Case ID	Case Name *	Case Status *	Case Open Date	Assignment Category	Assigned Worker
169	November	Open	12/14/2015	-Select-	Andrew Troy

Save

1. The Program displays the name of the program that this *Case ID* is assigned to.
2. The Case Summary Pane contains the following fields:
    a. *Case ID* – This is the HCM case number for this case and is not editable.
    b. *Case Name* – This is the HCM case name for this case and can be edited by the assigned worker, supervisor, or manager.
    c. *Case Status* – This drop-down displays the status of Open or Closed. A Supervisor or Manager can update this status to close the case.
    d. *Case Open Date* – This displays the most recent date that the case was opened with HCM and is not editable.
    e. *Assignment Category* – This drop down is not used by HCM and is not editable.
    f. *Assigned Worker* – This displays the name of the worker assigned to the case and can be changed by a Supervisor or Manager.
3. After making any changes to the *Case Summary* pane the user must click the [Save] button inside the *Case Summary* pane in order to preserve the updated information.

The [Case Information] → [Summary] → [Case Summary] *pane is the ONLY place where the Case Status can be changed to CLOSED.*

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Next Steps pane

1. The Next Steps pane contains quick link buttons to the most commonly used case screens.

   a. **Review Household** opens Case Information → Household

   b. **Add Contact** opens Tracking → Contacts

   c. **Review Involvement** opens Case Information → Involvement

   d. **View Case Plan** opens Tracking → Plans

   e. **Exit Case** navigates the user back to the Dashboard.

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