



Case: Recommendations – HCM Job Aid

The *Recommendations* screen displays possible connections between the Consumers on the Case and other DHS system/program involvements. If appropriate, these Cases can be associated within Synergy. The HMIS Data Exchange pane allows users to send and receive updates between HCM and HMIS.

Recommendations

System Recommendations

Listed below are other program/system involvements of the household member associated to this case. It is recommended that the case details are reviewed and associated for other DHS staff to be aware and better serve the client.

HH Member	Relation	Case Name	Case ID	Case Date	System	View Details	Action
	Self	SMITH	1111	9/26/2016	YSP		<button>Disassociate</button>

Add Case

Case ID * System * -Select- Associate

HMIS Data Exchange

Client

☒ New Updates ☐ Past Updates ☐ Submitted Updates

Send?	Date Updated	HCM Client	HCM Field	HCM Value	HMIS Field	HMIS Value	Assessment Date
☐			Enrollment Status	Attending School Regularly			
☐			School District of Record	PITTSBURGH SD			
☐			Name of School	FAISON HELEN S ARTS ACADEMY			

Last update submitted on : 01/17/2017 5:52:19 PM

CheckSubmit

Navigation

- From the **Dashboard**: Locate the desired Case and click on the *Case ID* to bring the Case into focus.
 - Click on the **Tracking** tile. Then click on the **Recommendations** tile.

System Recommendations

1. **System Recommendations**: This pane lists other program/system involvements of the Household Members associated to this Case. It is recommended that the Case Details are reviewed and associated for other DHS staff to be aware and better serve the individual.

System Recommendations

Listed below are other program/system involvements of the household member associated to this case. It is recommended that the case details are reviewed and associated for other DHS staff to be aware and better serve the client.

HH Member

Relation

October November

Self (Youth)

Case Name

Case ID

Case Date

System

View Details

Action

Smith	11111	5/13/2013	KIDS		Associated
Smith	241	7/28/2017	HCM		Disassociate

Add Case

Case ID *

System *

-Select-

Associate

- a. The Household Member (*HH Member*) with other DHS System/Program involvements will be displayed here.
- b. The list of other Cases where the identified household member is involved will be listed here. This connection is based on MCI ID.
 - i. This grid will list the *Case Name*, *Case ID*, *Case (open) Date*, and *System*.
 - ii. The Connected Symbol [] in the *System* column indicates that this Case is connected and information is being shared. Information on this Case can be viewed by clicking the View Details Icon [] which will open a *Case Summary* pop-up for review.
- c. After reviewing the Case Summary details the user can choose to associate the Cases by clicking the **Associate** button in the *Action* column of the grid.
 - i. If a Case has already been associated the **Associated** button will be displayed in the *Action* column for workers.



- ii. Supervisors and Managers will have the **Disassociate** button instead which allows the Supervisor/Manager to disconnect the Case.

A confirmation pop-up will appear when **Disassociate** is clicked:

Disassociate Case?

Yes No

Clicking **Yes** will disconnect the Cases.

Clicking **No** will close the pop-up without disconnecting the Cases.

- d. **▼ Add Case**: This pane allows users to manually associate a Case from another application within Synergy.

▼ Add Case

Case ID * System *

-Select-

- i. *Case ID*: Enter the Case ID for the Case that will be associated.
- ii. *System*: Select from the drop-down the Synergy application where the Case that will be associated resides.
- iii. Click **Associate** to connect the Cases.

A confirmation pop-up will appear when **Associate** is clicked:

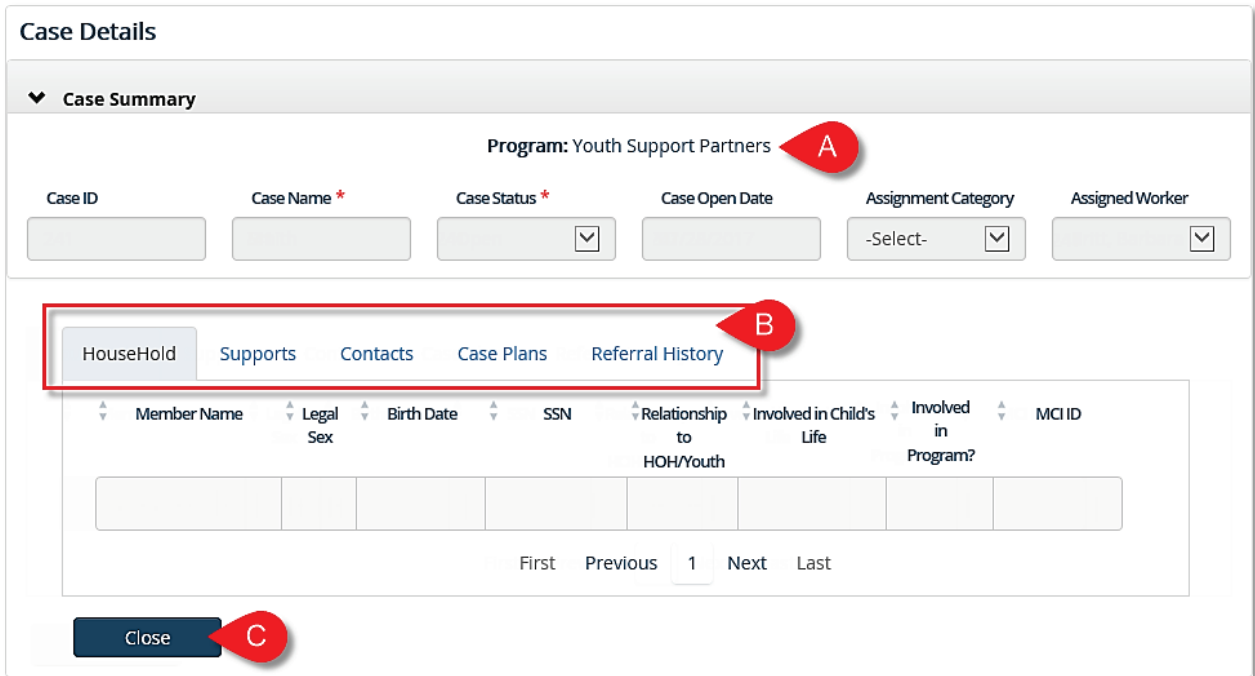
Associate Case?

Yes No

Clicking **Yes** will connect the Cases.

Clicking **No** will close the pop-up without connecting the Cases.

2. The *Case Summary* pop-up displays some limited information on the Case. To open, click the View Details Icon [] :



- The *Program* will be listed at the top of the pop-up. Depending on the program different information may be captured in the top section of the *Case Summary* pop-up.
- Click on each tab to view information on the Case.
 - Household*: contains a list of the individuals in the Case's Household.
 - Supports*: Contains a list of the active Supports on the Case.
 - Contacts*: Displays a list of contacts but does not allow the contacts to be opened and viewed.
 - Case Plans*: Contains a list of the Case Plans.
 - Referral History*: Contains a list of prior Referrals for this Case.
- Click  to close the pop-up.



HMIS Data Exchange

1. **HMIS Data Exchange**: This pane allows users to send and receive data between HCM and HMIS. This includes education, non-cash benefit, and health insurance information for active household members who are also active with HMIS.

The screenshot shows the 'HMIS Data Exchange' interface. Callout A points to the 'Client' dropdown menu set to 'All'. Callout B points to the radio buttons for 'New Updates' (selected), 'Past Updates', and 'Submitted Updates'. Callout C points to the 'Send?' checkboxes in the first column of the data table.

Send?	Date Updated	HCM Client	HCM Field	HCM Value	HMIS Field	HMIS Value	Assessment Date
☐			Enrollment Status	Attending School Regularly			
☐			School District of Record	PITTSBURGH SD			
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Check **Submit**

- a. Client: Using the drop-down, select a client to view data exchange information for. To view information for all of the household members, select "All" from the drop-down.
- b. This grid will default to display **New Updates**. Use the radio buttons to filter the list to **Past Updates** or **Submitted Updates**.
 - i. Click **Check** to refresh the grid with the latest information.
- c. Using the checkboxes to the left of the grid, select the data to send to HMIS for updates and/or the data from HMIS to accept into HCM.
 - i. Click **Submit** to submit data to HMIS and/or to accept HMIS data into HCM.

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 <http://dhsassist.dhs.allegheny.local> for internal users.