DEPARTMENT OF HUMAN SERVICES
ALLEGHENY COUNTY, PENNSYLVANIA

Homeless
Services
& Supports

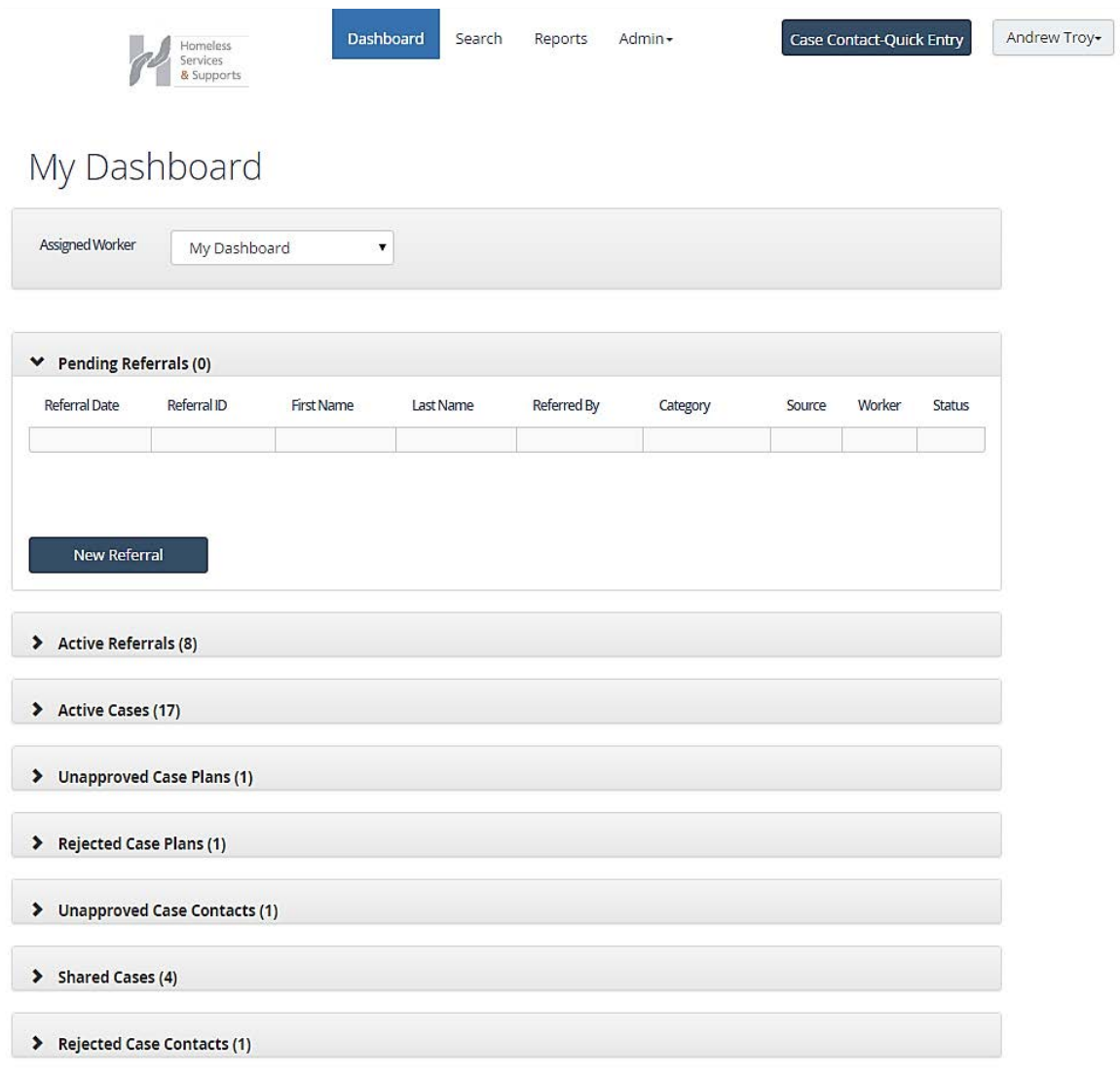HOMELESS CASE MANAGEMENT

My Dashboard – HCM Job Aid

The Dashboard is the first screen that appears after logging into the HCM application. This screen allows workers to access their Cases and Referrals as well as any Contacts or Plans that have been rejected by a Supervisor.

My Dashboard

Accessing My Dashboard

1. The **Dashboard** is one of the Static Navigation Buttons that can be found at the top of every YSP screen.

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Navigating through My Dashboard

My Dashboard

Assigned Worker | My Dashboard ▾ | **A**

❤ Pending Referrals (0) **B**

Referral Date	Referral ID	First Name	Last Name	Referred By	Category	Source	Worker	Status

New Referral

❯ Active Referrals (8) **C**

❯ Active Cases (17) **D**

❯ Unapproved Case Plans (1) **E**

❯ Rejected Case Plans (1) **F**

❯ Unapproved Case Contacts (1) **G**

❯ Shared Cases (4) **H**

❯ Rejected Case Contacts (1) **I**

1. After selecting Homeless Case Management on the Synergy Splash screen the user will be taken directly to the Dashboard. All of the panes on this screen default to being minimized. Use the Chevrons [❯ ❤] to open and close the panes. The header of each pane contains the number of items in the pane in parentheses.

    a. *Assigned Worker*: For workers this drop-down will be locked to "My Dashboard" and will only show information about Referrals and Cases assigned to the worker.
        i. Supervisors and Managers can select another worker from this drop-down to view that worker's Dashboard.

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b. *Pending Referrals* is where all of the HCM referrals that have not yet been processed reside. The [New Referral] button can also be found in this pane.

c. *Active Referrals* displays all the user's referrals with a status of "Assigned" or "In Progress".

d. *Active Cases* displays all of the user's currently active cases. The user can navigate to a Case by clicking on the *Case ID* in the grid. Clicking on the Contacts Icon [ ] will navigate the user directly to [Tracking] → [Contacts].

e. *Unapproved Case Plans* contains Case Plans sent to the Supervisor for approval. This pane is only viewable by YSP Supervisors and Managers. The HCM Supervisor will open this pane to review and approve or reject the Case Plans sent to them by the HCM workers.

f. *Rejected Case Plans* contains Case Plans that have been rejected by the HCM Supervisor and sent back to the worker to correct and re-submit for approval.

g. *Unapproved Case Contacts* contains Case Contacts sent to the Supervisor for approval. This pane is only viewable by YSP Supervisors and Managers. The HCM Supervisor will open this pane to review and approve or reject the Case Contacts sent to them by the HCM workers.

h. *Shared Cases* contains Cases that have been partially or fully shared with the user.

i. *Rejected Case Contacts* contains Case Contacts that have been rejected by the HCM Supervisor and sent back to the worker to correct and re-submit for approval.

2. Every [Dashboard] pane contains a **Search within...** field from which the fields can filter the grid down to any grid item containing all or part of a word, date, or number.

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