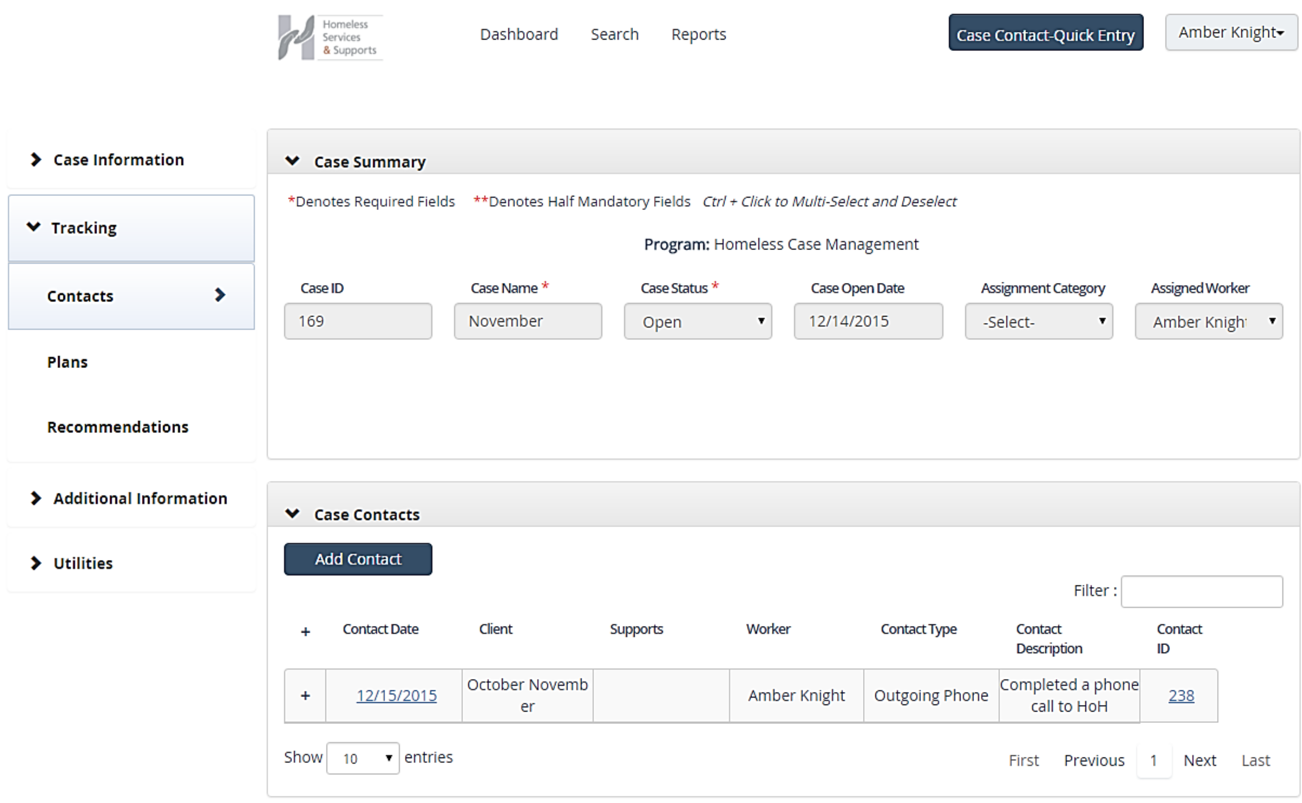
Tracking – Contacts – HCM Job Aid

The Contacts screen is used to document when there is any type of communication pertaining to a Case and its members. Contacts entered via *Case Contact-Quick Entry* will also appear in the Contacts grid.

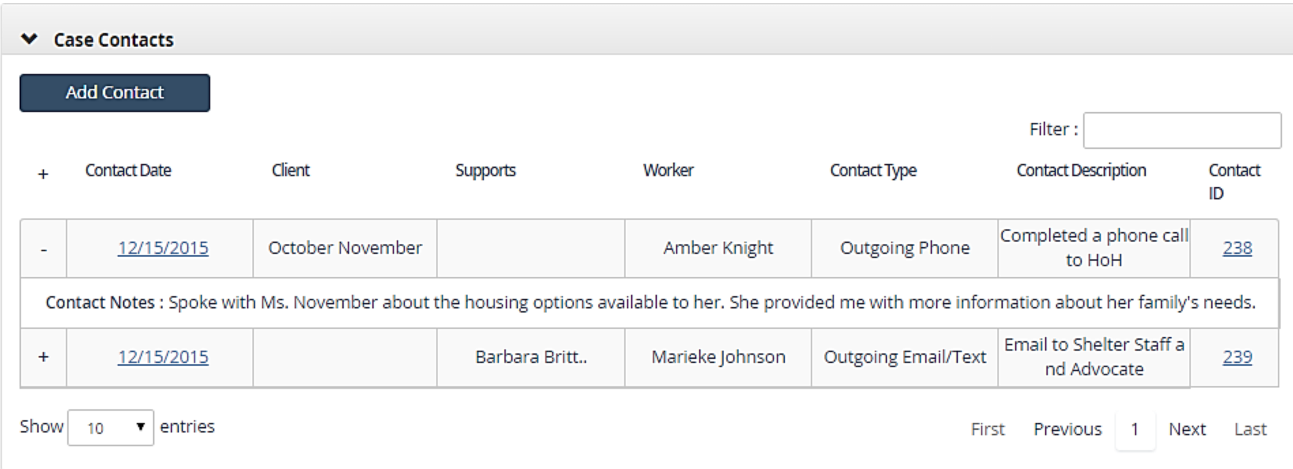
Case Contacts Screen



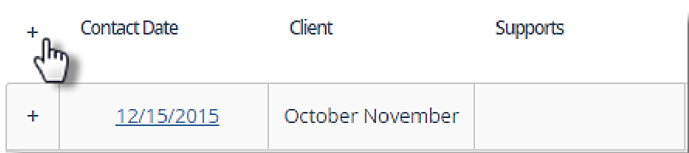
Accessing the Contacts Screen

1. Contacts can be found under Tracking and can be accessed several ways:
    a. From the Dashboard: Open the Active Cases pane and click on the (Contacts icon) which appears to the right of each case in the grid.
    b. Navigating from within the case:
        i. Tracking → Contacts
        ii. Case Information → Summary → Next Steps → Add Contact

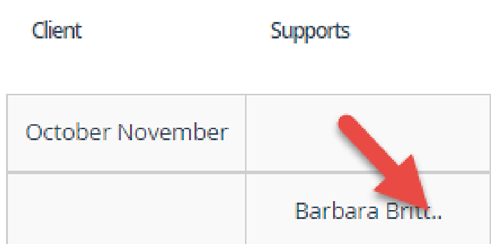
Case Contacts Pane



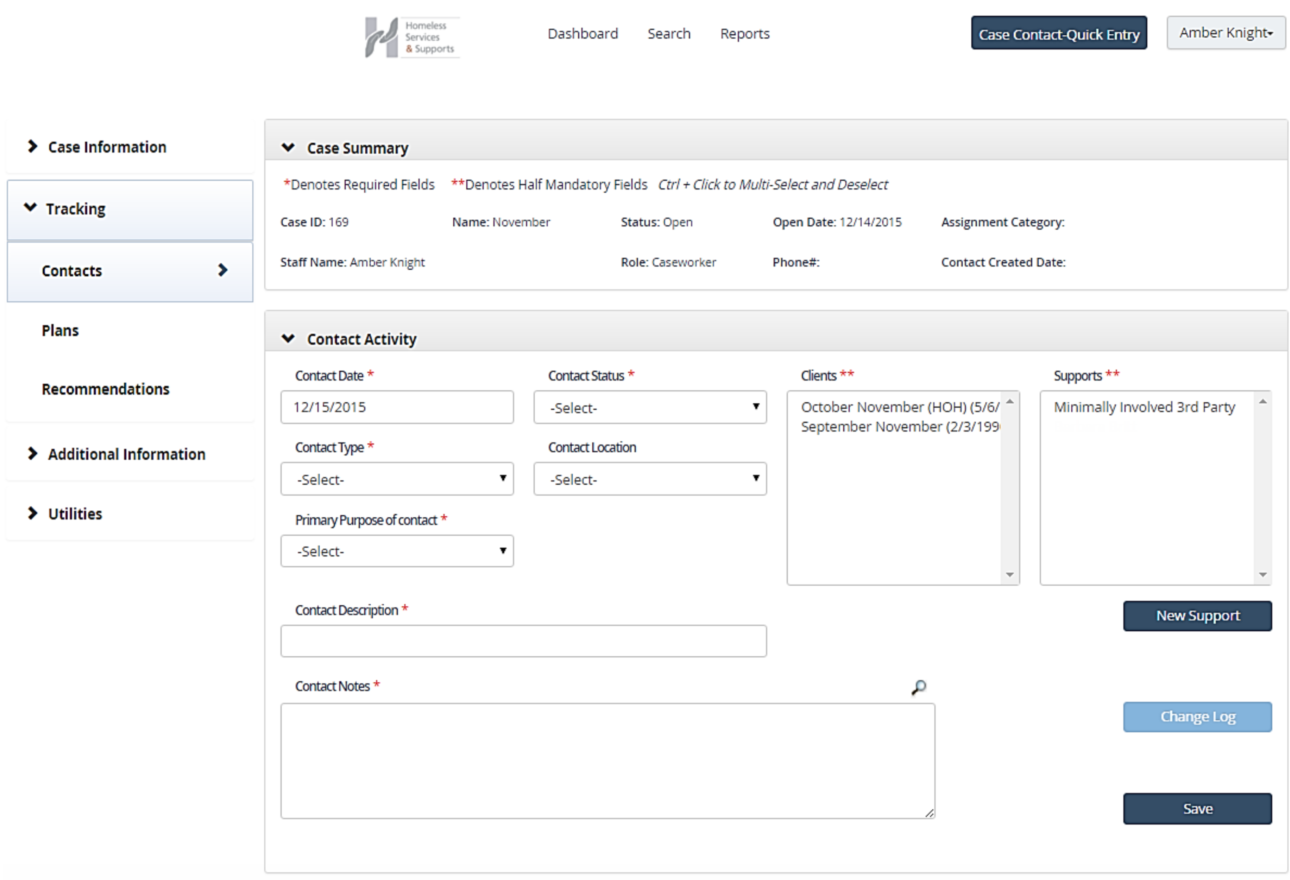
1. To start documenting a new Contact click Add Contact.
2. To view or update an existing Contact click on the *Contact Date* or *Contact ID* of the desired Contact in the Case Contacts grid.
3. To view the *Contact Notes* from the grid without opening the Contact click on the [**+**] to the left of the Contact in the grid. To close the *Contact Notes* view click on the [**-**] that now appears to the left of that Contact in the grid.
4. To view the *Contact Notes* for all of the Contacts in the current page of the grid click on the [**+**] above the grid. To collapse all of the Contact Notes click on the [**-**] that now appears above the grid.



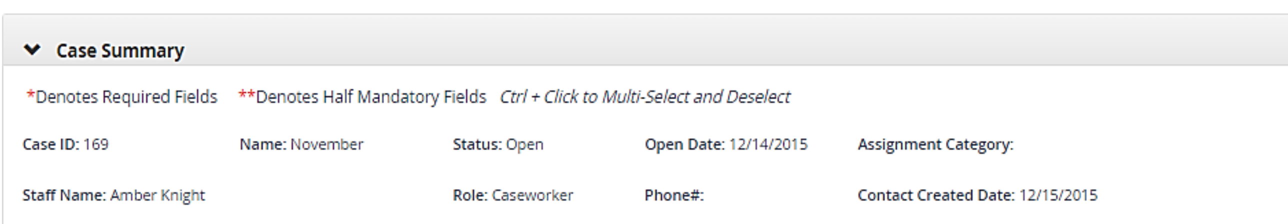
5. If a Contact includes multiple Clients or Supports that column in the grid will have an ellipsis [**...**] after the first Client or Support name listed:



Completing the Contact

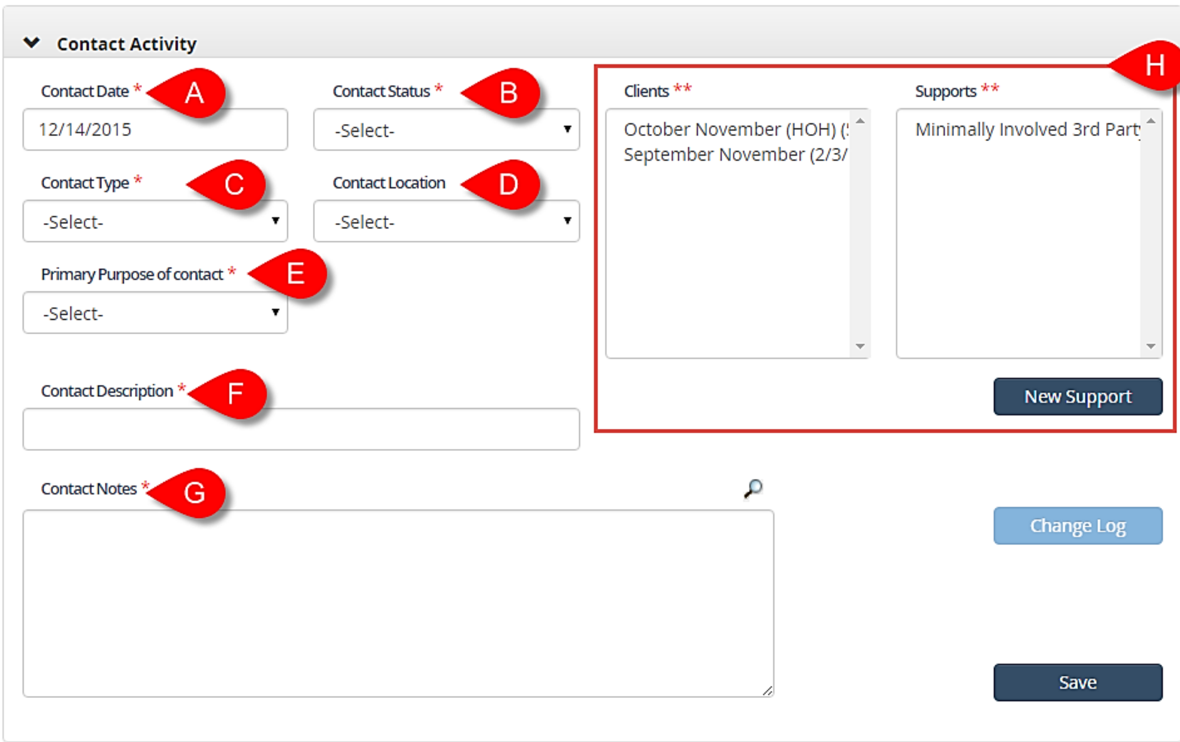


Contacts Case Summary Pane



The Case Summary pane is non-editable and displays information about the Case and the Contact being viewed/edited. This information includes the Case *ID*, Case *Name*, Case *Status*, Case *Open Date*, *Assignment Category* (not currently used by HCM), the *Staff Name*, *Role*, *Phone#*, and the *Contact Created Date*.

Contact Activity Pane

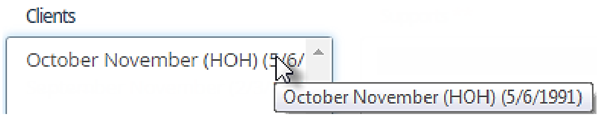


1. The Contact Activity pane is where the details of the Contact are documented. The *Date, Worker*, *Contact Type*, and *Contact Description* will pull into the Case Contacts pane's list of Contacts along with the *Clients* and *Supports* who participated in the Contact.

    a. *Contact Date*: Enter the date that the Contact occurred.
    b. *Contact Status*: Select the status of the Contact.
    c. *Contact Type*: Select the method of Contact from this drop-down.
    d. *Contact Location*: Select the location where the Contact occurred from this drop-down.
    e. *Primary Purpose of contact*: Select the Contact purpose from this drop-down.
    f. *Contact Description*: Enter a brief description of the Contact.
    g. *Contact Notes*: Enter the narrative of the Contact here.
    h. Clients and Supports: Click to select the Clients and Supports who participated in the Contact from these two multi-select boxes. Only active Clients and Supports will be available as options.

        i. To select more than one person in the Client or Support boxes hold down the Ctrl key on the keyboard while clicking on each Client or Support who participated in the Contact. Selected individuals be highlighted in blue or grey after their names have been clicked. To de-select a Client or Support hold down the Ctrl key and click on the individual again. The de-selected individual will then no longer be highlighted.

ii. Clients will display with their name and date of birth. The Head of Household will have "(HoH)" next to their name. To view the full name and date of birth hover the cursor over the client's name.



iii. The option of "Minimally Involved 3rd party" will always be available in the *Supports* box. This option can be selected when the person participating in the Contact does not meet the criteria to be included in the list of Supports on the case.

iv. If a participating Support person is not listed in the Supports box they can be added using the New Support button. Remember that this list only includes active Supports. Only add a new Support if the person has not previously been documented as a Support on this case. An end-dated Support can be made active again in Case Information → Supports.

v. If a participating Client is not listed in the Clients box they can be added in Case Information → Household Only add a new Client if the person has not previously been documented as a Client on this case.

1. An end-dated Client can be made active again in Case Information → Involvement.

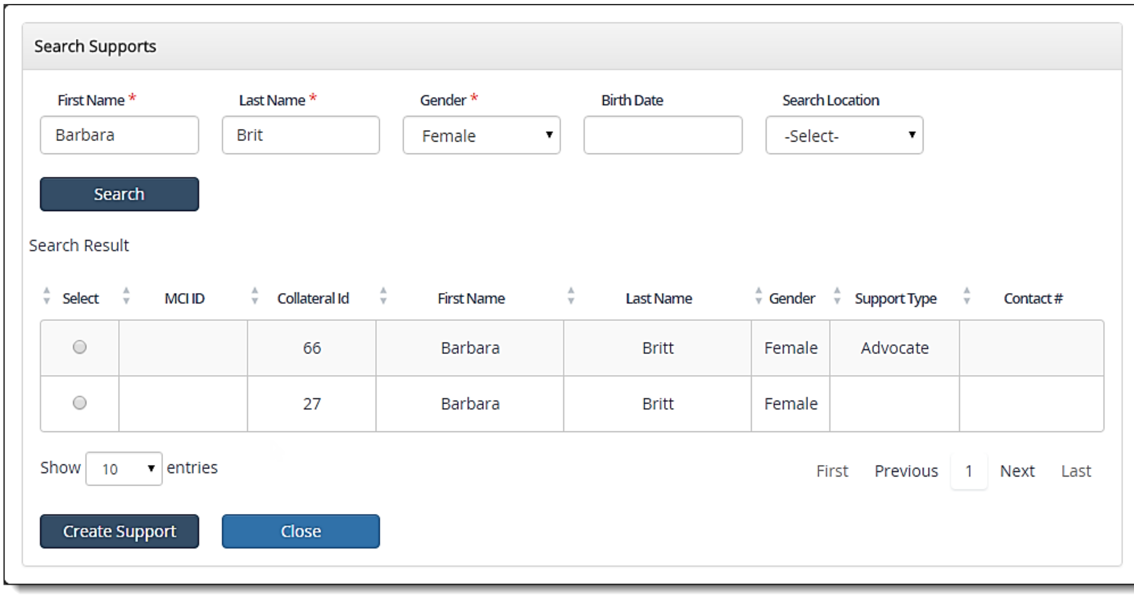
Don't forget to click Save *in the* Contact Activity *pane before navigating to another screen or the information entered will be lost!*

Making a Support active again? Go to:
Case – Supports – HCM Job Aid

Adding a Client? Go to:
Case – Household – HCM Job Aid

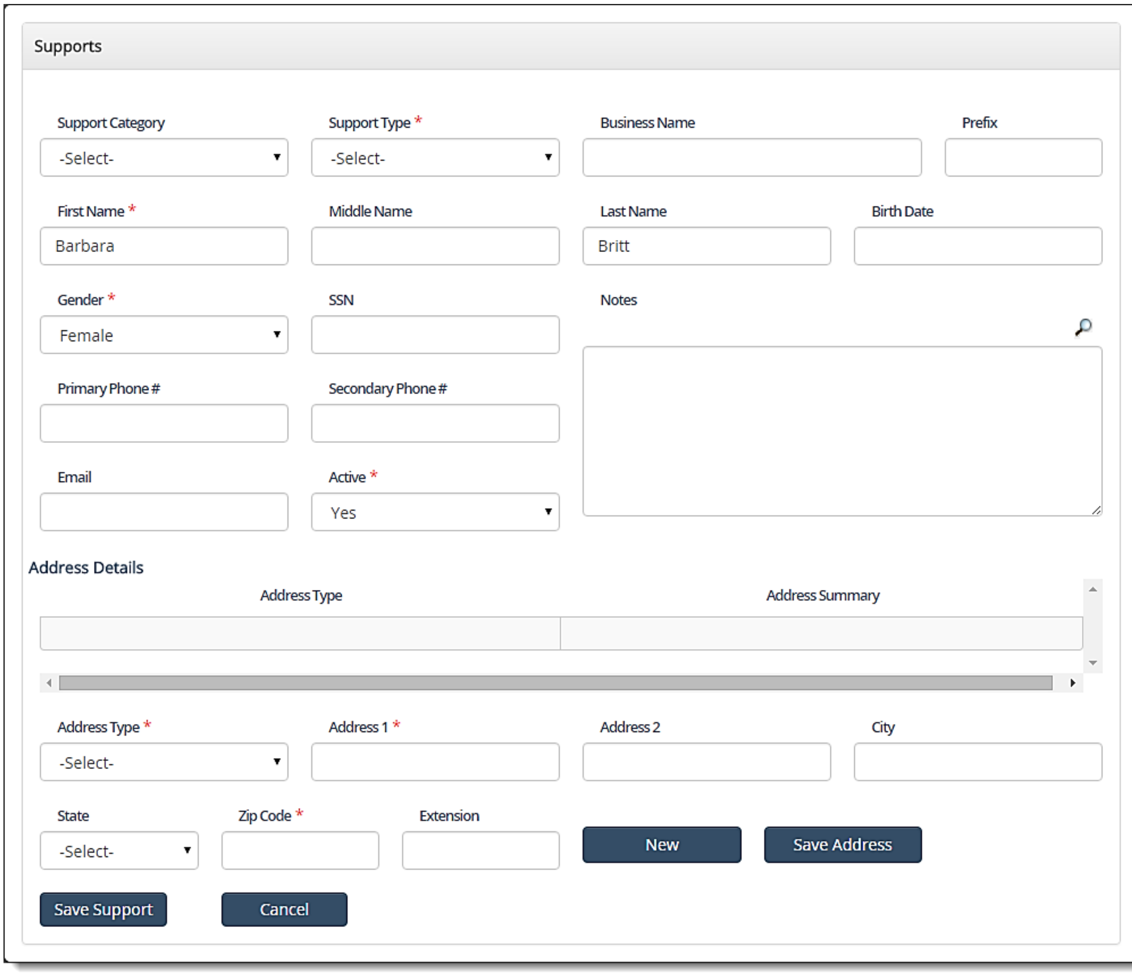
Making a Client active again? Go to:
Case – Involvements – HCM Job Aid

2. Adding a new Support from within the **Contact Activity** pane:
   a. Click the **New Support** button.
   b. The *Search Supports* pop-up will appear:



      i. Enter the *First Name, Last Name, Gender,* and *Birth Date* (if known).
      ii. Select the *Search Location*. Supports can be searched for in all of Synergy (Enterprise) or only in a specific program such as HCM or YSP.
      iii. Click the **Search** button to locate possible matches in the system. A list of possible matches will display in the *Search Result* grid.
      iv. Review the results. If none of the results match the person being added, click **Create Support** without selecting anyone from the Search Result grid.
      v. If there is a match in the *Search Result* grid click the *Select* radio button next to the desired person and then click **Create Support**.
      vi. To close the *Search Support* pop-up without adding a support click **Close**.

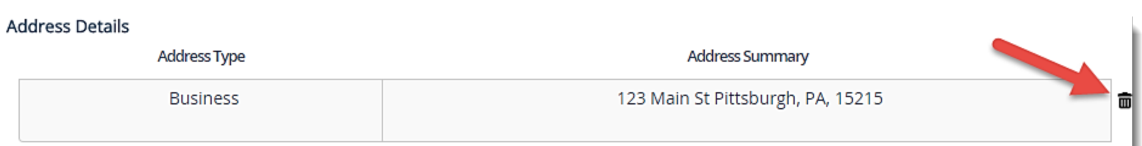
c. When Create Support is clicked the *Supports* pop-up will appear.



i. Enter all of the relevant information for this Support in the *Supports* pop-up.

ii. Multiple addresses can be entered for the Support. The Support can also be saved without entering an address.

1. To add a new address click New.
2. When the address is completed click Save Address to add this address to the *Address Details* grid.
3. If an address has been added in error click the delete icon [🗑] to the right of the address in the *Address Details* grid to delete it.



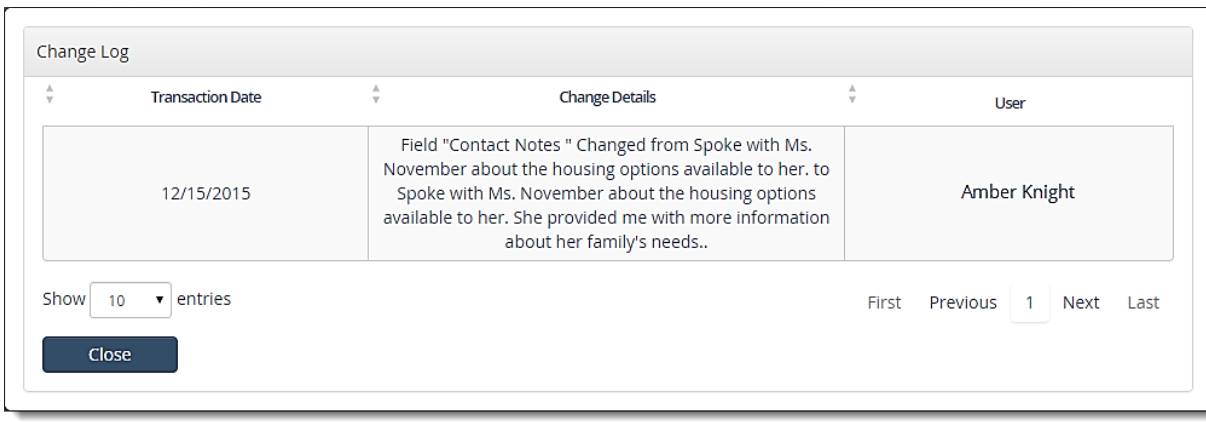
iii. To save the Support click Save Support.

iv. To close the pop-up without saving the Support click Cancel.

3. To preserve the information entered in the Contact Activity pane click Save.

4. Once the Contact is saved the screen will automatically return to the Tracking → Contacts screen.

5. After the Contact has been saved for the first time any changes made to the Contact will enable the Change Log button in the Contact Activity pane.
   a. Change Log brings up the list of changes made to the Contact as well as the User(s) who made each change.



Change Log

Transaction Date	Change Details	User
12/15/2015	Field "Contact Notes " Changed from Spoke with Ms. November about the housing options available to her. to Spoke with Ms. November about the housing options available to her. She provided me with more information about her family's needs..	Amber Knight

Show 10 entries

First Previous 1 Next Last

Close

   b. Click Close to close the *Change Log* pop-up.

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