



Home Visiting Portal

HOME VISITING PORTAL USER GUIDE:



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Introduction

How will I use the Home Visiting Portal application in Synergy?

The Home Visiting Portal application in Synergy allows providers to:

- Review and respond to Home Visiting referrals.
- Document the end of the provider's involvement with the consumer.
- Access closed Referrals for the provider's agency or agencies.
- Update Vacancy status and Home Visiting Program email notification lists.

What is Synergy?

Synergy is an IT platform that hosts multiple DHS administered applications. Synergy applications cover a wide range of services from responding to referrals to complete caseload management and documentation.



Logging In

Allegheny County

Synergy Sign In

User Id

Password

Log In

[Password Self-Service](#)


- Navigate to the Synergy URL using Google Chrome or Microsoft Internet Explorer 11 and above:
<https://synergy.county.allegheny.pa.us/Synergy>
 - The [Password Self-Service](#) link will take you to Portal Guard to reset your password if it has expired or if you have forgotten it.
- Log in using your Login ID and Password.

TIP: Your user credentials are assigned by the Department of Human Services Service Desk. This will be a T, K, or X number.

Important Reminder!

All of the information in Synergy's applications is considered confidential. Access is limited to persons with user identification assigned by Allegheny County. Do not share or distribute your assigned user credentials.

Unauthorized access to this system or unauthorized use of the information contained therein is a violation of County, State and Federal Laws.

- Click the  button.
- You will then be taken to the Synergy Splash Page. Here you will find links to all of the Synergy Applications that you have been granted access to with your Login ID.
- Click on the Home Visiting Portal icon to access the Home Visiting Portal.



Common Navigation Elements

Allegheny County Home Visiting Portal

User Menu: Amber Knight

Navigation Tiles

- Return to Dashboard
- Contact Info
- Referral Details
- Other Referrals

Client Contact Information

Print Preview

Referral Summary

Referral Date: 12/11/2015 | Referral ID: 1215 | Referral Status: Pending | Save

Household Information

| Member Name | Gender | Birth Date | Relationship to HOH | Citizenship | SSN | Vet Status |
|------------------|--------|------------|---------------------|-------------|-------------|------------|
| Kim Scenario | Female | 12/14/1975 | Self | Yes | xxx-xx-5214 | No |
| Child Scenario | Female | 10/30/2011 | Daughter | Yes | xxx-xx-2153 | No |
| Toddler Scenario | Male | 06/24/2014 | Son | Yes | xxx-xx-2315 | No |

Chevrons

- > Kim Scenario's Contact Information:
- > Referred By: Kim Scenario (Self)

Navigation Tiles

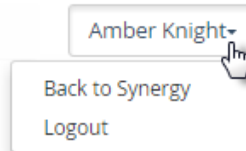
- These Navigation Tiles will always be at the top of the screen and can be accessed from any screen in the Home Visiting Portal. The navigation options will change depending on whether or not a specific referral is being viewed.
- A blue rectangle will appear around the navigation tile to indicate what screen you are on:

Return to Dashboard | Contact Info | **Referral Details** | Other Referrals

Common Screen Functions



User Menu

- This will display the name of the user who is logged in.
- Click on the ▼ to the right of your name to open the User Menu:



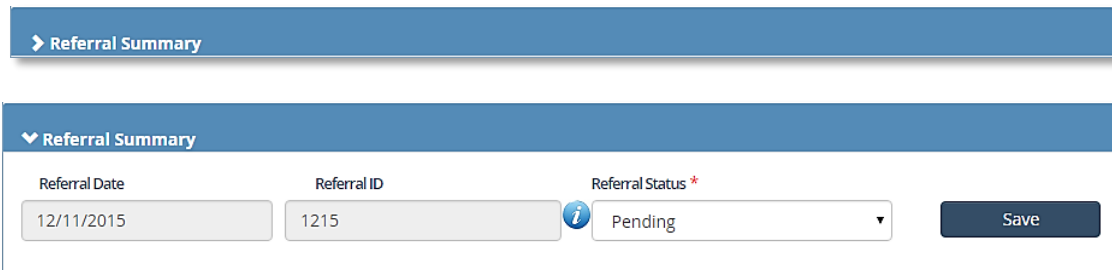
- Select "Back to Synergy" to return to the Synergy Splash Page and navigate to other Synergy applications that you have been granted access to.
- Select "Logout" to completely log out of Synergy and all of its applications.

Chevrons

- Chevrons can be used to open and close panes.
- Closed Chevron: 
- Open Chevron: 

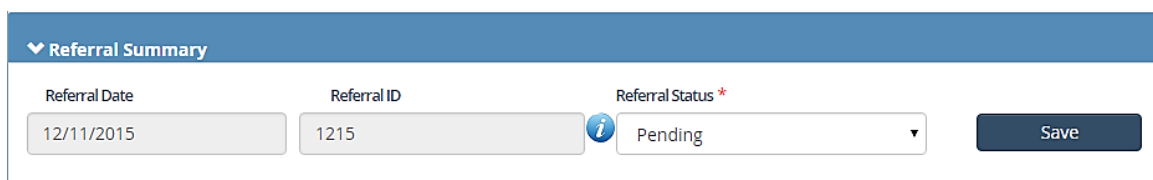
Panes

- Panes are smaller windows within the screen being viewed.
- Panes can be opened or closed using chevrons.



Referral Summary Pane

- The top Pane in each screen will be a *Referral Summary Pane*.
- This Pane contains basic information about the Referral currently being viewed.





Grids and Lists

Allegheny County Home Visiting Portal Amber Knight ▾

My Program Dashboard Pending Referrals Accepted Referrals Search Program Profiles

Pending Referrals

Sort Indicator →

Search Within... → Search within Referrals:

Headers { Referral Date Referral ID Client First Name Client Last Name Referred By Program Name Status Critical Case

| | | | | | | | |
|------------|----------------------|----------|----------|----------------|-------------|---------|--|
| 12/9/2015 | 1129 | Robert | Robinson | Bob Thompson | First Steps | Pending | |
| 12/4/2015 | 1076 | Monika | Richard | | First Steps | Pending | |
| 12/9/2015 | 1155 | Jennifer | Smith | Jennifer Smith | First Steps | Pending | |
| 12/11/2015 | 1215 | Kim | Scenario | Kim Scenario | First Steps | Pending | |

Show entries First Previous 1 Next Last

Pagination

- **Headers:** Identify what type of information can be found in the grid columns.
- **Search Within...** : These search fields can filter the grid down to any grid item containing all or part of a word, date, or number.
 - The filter will only apply to text and numbers that are contained within the grid itself. For example: Typing "Bob Thompson" will filter the list to all Referrals made by *Bob Thompson*.
 - This search also accepts partial entries. For example typing "11" will filter this list to include Referrals *1129*, *1155*, and the Referral made on *12/11/2015*. Typing "Tho" will bring up all Referrals made by *Bob Thompson*.
 - To clear the search results click the **X** that appears to the right inside the search field or delete the search terms.
- **Sort Indicator:** ▴ ▾ This indicates what direction the Header in the grid is sorted in to. To sort the list on a specific Header click on the Header. The sort indicator will point upward for ascending order ▴ and downward for descending order ▾.
- **Hyperlinks:** Hyperlinks within the grid will open the item in the grid. Clicking on [1076](#) will open Referral# 1076.
- **Pagination:** Longer lists will be separated into pages. These pages can be navigated through using the **First Previous 1 2 3 4 Next Last** links at the bottom-right of the grid. To the bottom-left of the grid is a drop-down option that allows you to change the number of grid entries displayed per page.




Common Screen Elements


Fields and Drop-downs

The screenshot shows a 'Referral Summary' form. It contains three input fields: 'Referral Date' with the value '12/11/2015', 'Referral ID' with the value '1215', and 'Referral Status *' with the value 'Pending'. A red arrow labeled 'Fields' points to the 'Referral ID' field. Another red arrow labeled 'Drop-Downs' points to the 'Referral Status *' field. A 'Save' button is located to the right of the 'Referral Status *' field.

Fields

- A field is an area where data has been entered.
- White fields can be edited.
- Greyed out fields cannot be edited.
 - If you move your mouse over a greyed out field a  will appear.

Drop-downs

- A drop down is a list of options that items can be selected from.
- White drop-downs can be edited.
- Greyed out drop-downs cannot be edited.
 - If you move your mouse over a greyed out drop-down a  will appear.

Buttons

- Buttons can indicate actions that can be taken such as  or .

Mandatory Fields

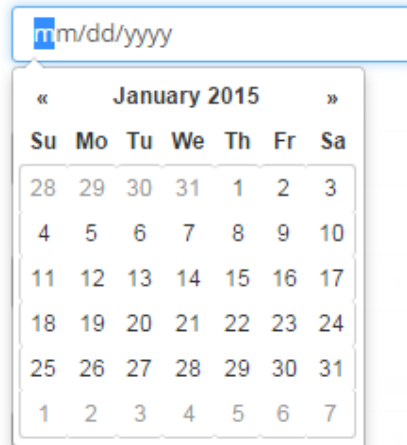
- Mandatory fields are marked with a red asterisk *.
- Mandatory fields must be filled out in order to save a screen or move on to the next screen.

The screenshot shows a mandatory field labeled 'Reason for Departure*'. The field is a drop-down menu with the text '-Select-' and a downward arrow icon.



Date Fields

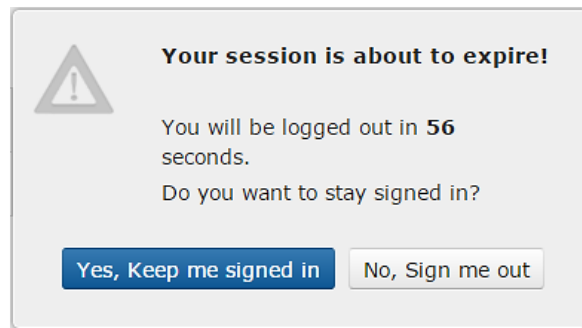
- You can enter a date by typing the date into the field using the *mm/dd/yyyy* format or by clicking on the date field and clicking the date from the calendar that opens up.
 - Use the << and >> arrows to change the month in the calendar.



Exiting HVP & Service Desk Support

Timing Out

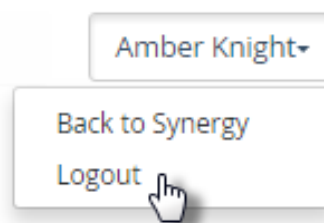
- After 50 minutes of inactivity in the application, the screen will time out.
- If the session has timed out, any unsaved information will be lost.
- Any action that causes the screen to refresh (such as saving or navigating to a different screen or tab) will reset the time-out clock.
- If you are close to timing out of the application you will receive a pop-up message warning you that your session is about to expire.



- While Synergy has a time out length of 50 minutes, Internet Explorer and Chrome may close your session sooner depending on the browser version you are using.

Logging out of the Application

- To log out, click the User Menu in the upper-right corner of the screen and select "Logout".



Service Desk Support

- For assistance please contact the Allegheny County Service Desk at servicedesk@alleghenycounty.us or call 412-350-HELP (4357) and select option 2 for DHS.
 - The Allegheny County Service Desk can also be used to obtain a user login and password for an employee of your agency or to end an employee's access,
- To access the Self Service Tool for the Allegheny County Service Desk go to: <http://servicedesk.alleghenycounty.us>.



My Program Dashboard

The Dashboard is the first screen that appears after logging into the Home Visiting Portal. The screen contains navigation tiles for all of the Home Visiting Portal and defaults to the Pending Referrals screen.

My Program Dashboard

The screenshot shows the 'My Program Dashboard' interface. At the top, there's a header bar with 'Allegheny County Home Visiting Portal' and a user dropdown 'Amber Knight'. Below this is a navigation bar with five tiles: 'My Program Dashboard' (selected), 'Pending Referrals', 'Accepted Referrals', 'Search', and 'Program Profiles'. The main content area is titled 'Pending Referrals' and features a search bar 'Search within Referrals:'. Below the search bar is a table with columns: 'Referral Date', 'Referral ID', 'Client First Name', 'Client Last Name', 'Referred By', 'Program Name', 'Status', and 'Critical Case'. The table contains four rows of data. At the bottom, there's a pagination control showing 'Show 10 entries' and navigation links 'First', 'Previous', '1', 'Next', 'Last'.

| Referral Date | Referral ID | Client First Name | Client Last Name | Referred By | Program Name | Status | Critical Case |
|---------------|----------------------|-------------------|------------------|----------------|--------------|---------|---------------|
| 12/9/2015 | 1129 | Robert | Robinson | Bob Thompson | First Steps | Pending | |
| 12/4/2015 | 1076 | Monika | Richard | Rita Peter | First Steps | Pending | |
| 12/9/2015 | 1155 | Jennifer | Smith | Jennifer Smith | First Steps | Pending | |
| 12/11/2015 | 1215 | Kim | Scenario | Kim Scenario | First Steps | Pending | |

Accessing and Navigating in My Program Dashboard

1. The Dashboard can be accessed from any screen by clicking on the Portal header at the top of the page:

Allegheny County Home Visiting Portal

2. To return to the Dashboard when viewing a Referral click the **Return to Dashboard** navigation tile:

Return to Dashboard

3. Navigation tiles for **Pending Referrals**, **Accepted Referrals**, **Search**, and **Program Profiles** are all accessed from the **Dashboard**.



Program Profiles

Providers will need to update their Program's *Vacancy Status* when logging in to the Home Visiting Portal for the first time before any referrals can be received. Providers are expected to maintain an up-to-date *Vacancy Status* for their Program(s). Email prompts and distribution lists for those email prompts can also be updated from this screen.

Updating the Program Profile

Allegheny County Home Visiting Portal

Amber Knight ▾

My Program Dashboard Pending Referrals Accepted Referrals Search Program Profiles

Program Profile

A Program Name -Select- ▾

B My Program's Vacancy Status -Select- ▾

C Turn on email prompts? ⓘ -Select- ▾

D Email Distribution List

*To receive email updates for new referrals, enter email addresses separated by a comma and a space. Ex: abc@email.com, def@email.com, ghi@email.com

E Save

1. Updating the *Program Profiles*:

- Select the *Program Name* to begin updating that Program's profile.
- Select the Program's current *Vacancy Status*: *Accepting New Clients*, *Accepting Waitlist*, or *Not Accepting Referrals*.
- Subscribe to the *Email Prompts* by choosing *Yes (Recommended)* from the drop-down. To view information on the email prompts click the ⓘ next to the *Email Prompts* drop-down. An informational pop-up will appear:

To help you stay up-to-date with new referral information, you have the option to "opt-in" to receive email reminder notifications. We highly recommend all users enable this feature so they are notified when:

- There are referrals in pending status for 3 or more days - reminding you to contact the potential client and update their referral status*
- There are cases in enrolled (active) status for 6 or more months - reminding you to close the case if the client has left the program*


To close the pop-up click the  button.

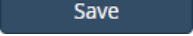


d. *Email Distribution List*:

To receive email updates for new referrals, enter the email addresses of all of the staff who are to receive the email updates (remember to include your own email as well). These email addresses should be separated by a comma and a space.

Example: abc@email.com, def@email.com, ghi@email.com.

The *Email Distribution* List text field can be made larger by clicking and dragging the bottom-right corner of the field .

- e. Click  to save the information that you have entered on the **Program Profiles** screen. The information will not be saved unless this button is clicked.



Pending Referrals List Screen

The Pending Referrals screen contains all of the referrals sent to the Provider to consider for provision of services. All referrals sent will default to a *Status* of *Pending*. The *Referral Status* is updated by the provider to reflect the provider's state of engagement with the consumer. The *Pending Referrals* list contains all Referrals with a Status of *Pending*, *In Progress*, or *Waitlist*.

Pending Referrals

Allegheny County Home Visiting Portal Amber Knight

My Program Dashboard Pending Referrals Accepted Referrals Search Program Profiles

Pending Referrals

Search within Referrals:

| Referral Date | Referral ID | Client First Name | Client Last Name | Referred By | Program Name | Status | Critical Case |
|---------------|----------------------|-------------------|------------------|----------------|--------------|---------|---------------|
| 12/9/2015 | 1129 | Robert | Robinson | Bob Thompson | First Steps | Pending | |
| 12/4/2015 | 1076 | Monika | Richard | Rita Peter | First Steps | Pending | |
| 12/9/2015 | 1155 | Jennifer | Smith | Jennifer Smith | First Steps | Pending | |
| 12/11/2015 | 1215 | Kim | Scenario | Kim Scenario | First Steps | Pending | |

Show entries First Previous 1 Next Last

Accessing the Pending Referrals list

1. When logging into the Home Visiting Portal the user is immediately taken to the **Pending Referrals** screen.
2. **Pending Referrals** can be accessed from the navigation tiles at the top of the screen.
3. To return to **Pending Referrals** when viewing a Referral the user must first navigate back to *My Program Dashboard* by clicking the **Return to Dashboard** navigation tile or the **Allegheny County Home Visiting Portal** header at the top of the screen.



Navigating the Pending Referrals list

Allegheny County Home Visiting Portal Amber Knight

My Program Dashboard Pending Referrals Accepted Referrals Search Program Profiles

Pending Referrals

Search within Referrals:

| Referral Date | Referral ID | Client First Name | Client Last Name | Referred By | Program Name | Status | Critical Case |
|---------------|----------------------|-------------------|------------------|----------------|--------------|---------|---------------|
| 12/9/2015 | 1129 | Robert | Robinson | Bob Thompson | First Steps | Pending | |
| 12/4/2015 | 1076 | Monika | Richard | Rita Peter | First Steps | Pending | |
| 12/9/2015 | 1155 | Jennifer | Smith | Jennifer Smith | First Steps | Pending | |
| 12/11/2015 | 1215 | Kim | Scenario | Kim Scenario | First Steps | Pending | |

Show entries First Previous 1 Next Last

1. Navigating the Pending Referrals list:

- Use the *Search within Referrals* to search for a specific Referral or filter to the *Pending Referrals* list.
- The *Pending Referrals* Grid can be sorted by any column header.
 - The list is pre-sorted first by *Critical Case Flag* and then by *Referral Date* (oldest to newest).
- The Critical Case Flag [] can be found at the end of the Referral line in the grid.

What causes a Referral to receive a Critical Case Flag?

A referral that has a Critical Case Flag indicates that this individual should be contacted as soon as possible. Referrals with these flags will appear at the top of your referral list. A referral can receive this status by virtue of information provided by the referring entity (for example, if a doctor calls the Allegheny Link with his/her patient and indicates that the family should be seen as soon as possible) or on the basis of what a parent indicates in their own conversation. In no situation will a provider receive a Critical Case referral if someone is in a true crisis, as the Link will assist these families in a different way.

- To select a specific Referral click on the desired Referral's *Referral ID* in the *Pending Referrals* grid
- Pagination allows the user to navigate through multiple pages of referrals (depending on the length of the pending Referrals list).



Reviewing a Referral

A Referral's information can be reviewed no matter what the Referral's status is. The Referral's status determines how the user will navigate to access the referral's information.

If the Referral's status is *Pending*, *In Progress*, or *Waitlist* it will be accessible via the **Pending Referrals** screen.

If the Referral's status is *Enrolled* it will be accessible via the **Accepted Referrals** screen.

Referrals of any status can be accessed via the **Search** screen. If the Referral's status is *Not Enrolled* or *Closed* it can only be accessed via the **Search** screen.

Previewing and Printing the Referral

Allegheny County Home Visiting Portal

Amber Knight

Return to Dashboard | Contact Info | Referral Details | Other Referrals

Client Contact Information

Print Preview

https://synergytrain.county.allegheny.pa.us/PSP/Report/DisplayReport.aspx - Google Chrome

https://synergytrain.county.allegheny.pa.us/PSP/Report/DisplayReport.aspx

| Referral Summary | | | | | | |
|------------------|-------------|-----------------|--|--|--|--|
| Referral Date | Referral ID | Referral Status | | | | |
| 01/05/2016 | 501 | Pending | | | | |

| Household Information | | | | | | |
|-----------------------|--------|------------|---------------------|-------------|-------------|------------|
| Member Name | Gender | Birth Date | Relationship To HOH | Citizenship | SSN | Vet Status |
| Sylvia Harrington | Female | 01/11/1994 | Self | Yes | XXX-XX-3154 | No |

1. Previewing and Printing the Referral:

- The **Contact Info** screen contains a *Print Preview* button []. Click this button to bring up a printable PDF version of the Referral.

Note: your browser may block pop-ups automatically depending on your browser settings. If the Print Preview pop-up does not appear check to make sure that pop-ups are enabled.

Reminder: All of the information in this referral is considered confidential and printed copies of the referral should be treated with the same confidentiality as access to the Home Visiting Portal itself.



Referral Navigation and Common panes

Allegheny County Home Visiting Portal Amber Knight ▾

1 [Return to Dashboard](#) [Contact Info](#) [Referral Details](#) [Other Referrals](#)

Client Contact Information Print Preview

2 **Referral Summary**

Referral Date: 01/05/2016 Referral ID: 501 Referral Status: Pending Save

3 **Household Information**

| Member Name | Gender | Birth Date | Relationship to HOH | Citizenship | SSN | Vet Status |
|-------------------|--------|------------|---------------------|-------------|-------------|------------|
| Sylvia Harrington | Female | 01/11/1994 | Self | Yes | xxx-xx-3154 | No |
| Laura Harrington | Female | 01/29/2015 | Daughter | Yes | xxx-xx-0210 | No |

1. All referrals contain the following navigation tiles:
Return to Dashboard, Contact Info, Referral Details, and Other Referrals.
2. The *Referral Summary* pane appears on every screen in the Referral and includes:
 - i. The *Referral Date*
 - ii. The *Referral ID*. If the case has been flagged as critical the Critical Case flag [] will appear next to the *Referral ID*.
 - iii. The *Referral Status*. Clicking on will bring up an informational pop-up defining the different Referral Status options.
3. The *Household Information* pane appears on every screen in the Referrals. This pane contains a list of the household members and includes household members':
 - i. *Gender*
 - ii. *Birth Date*
 - iii. *Relationship to HOH* (Head of Household). If the *Relationship to HOH* is "Self" then that Household Member has been identified as the Head of Household.
 - iv. *Citizenship*
 - v. The last 4 digits of the household members' *SSN* (Social Security Number)
 - vi. The household member's *Vet Status* (Veteran Status).



Referral – Contact Info screen panes

Allegheny County Home Visiting Portal

Amber Knight

Return to Dashboard | Contact Info | Referral Details | Other Referrals

Client Contact Information Print Preview

1. Referral Summary
2. Household Information
3. Sylvia Harrington's Contact Information:
4. Referred By: Dwight Maldonado (Medical)

1. *Referral Summary* pane (present on all Referral screens).
2. *Household Information* pane (present on all Referral screens).
3. *Contact Information* pane:

▼ Sylvia Harrington's Contact Information:

Address Information

| Address Type | Address Summary |
|--------------|--|
| Home | 1234 Home St, Pittsburgh, Pennsylvania, 15104 |
| Business | 1 Smithfield St, Pittsburgh, Pennsylvania, 15222 |
| Mailing | 1234 Home St, Pittsburgh, Pennsylvania, 15104 |

Phone Information

| Phone Type | Phone # |
|------------|----------------|
| Home | (412) 555-4663 |
| Work | (412) 555-9675 |
| Cell | (412) 555-2355 |

Email Address

sharrington@gmail.com

Primary Language

English

- a. This pane contains the contact information for the consumer who has been identified as the HOH (Head of Household) and includes their *Address Information* (Home, Business, and Mailing address), *Phone Information* (Home, Work, Cell phone number), *Email Address*, and *Primary Language*.



4. *Referred By* pane:

▼ Referred By: Dwight Maldonado (Medical)

Address Information

| Address Type | Address Summary |
|--------------|---|
| Business | 1234 UPMC St, Pittsburgh, Pennsylvania, 15213 |

Phone Information

| Phone Type | Phone # |
|------------|--------------|
| Work | 412-555-1234 |

Email Address

dmaldonado@upmc.com

Relationship to Consumer

Medical

UPMC Pediatrician

- a. This pane contains information regarding the Referral Source. The Referral Source's name and Relationship to Consumer is listed in the pane's header.
- The pane contains the Referral Source's *Address Information*, *Phone Information*, *Email Address* and their *Relationship to Consumer*.



Referral – Referral Details screen panes

Allegheny County Home Visiting Portal

Amber Knight

Return to Dashboard Contact Info Referral Details Other Referrals

Referral Details

- 1 Referral Summary
- 2 Household Information
- 3 Concerns
- 4 Pregnancy Related
- 5 Notes for Parent Support Provider
- 6 Additional Client Information
- 7 Early Head Start and Head Start Related
- 8 Alliance Questions

1. *Referral Summary* pane (present on all Referral screens).
2. *Household Information* pane (present on all Referral screens).
3. *Concerns* pane:

▼ Concerns

- ☒ Critical Case
- ☐ Homeless Resources
- ☐ Child behavior support
- ☐ Prenatal support and education
- ☐ Financial/Employment/Education goals
- ☐ Personal safety
- ☐ Education on child development
- ☐ Assessment of baby's growth
- ☐ Support with bonding
- ☐ Emotional Support
- ☐ Desire to meet other parents
- ☐ Help in accessing resources

- a. This pane contains all of the Consumer(s) needs as identified by the Consumer (Client).



4. *Pregnancy Related* pane:

▼ Pregnancy Related

Pregnancy Status:

Pregnant with First Child?:

Due Date:

Approximate Months Pregnant:

- a. This pane contains information regarding the Consumer and pregnancy. It includes the Consumer's *Pregnancy Status*, if they are *Pregnant with [their] first child?*, *Due Date*, and/or their *Approximate Months Pregnant*.

5. *Notes for Home Visiting Provider* pane:

▼ Notes for Parent Support Provider

Mother is looking for home visiting service to assist with her soon-to-be one year old child. She recently discovered she was pregnant and is looking for prenatal support and education as well.

- a. This pane contains notes for the Provider regarding the referral and the Consumer and may include notes from the Referral Source.

6. *Additional Client Information* pane:

▼ Additional Client Information

Income Information

| Member Name | Income Source | Income Amount | Frequency |
|-------------------|-------------------|---------------|-----------|
| Sylvia Harrington | TANF | 500 | Monthly |
| Sylvia Harrington | Employment Income | 400 | Monthly |
| Laura Harrington | None | 0 | |

Disability Information

| Member Name | Disability Type | Specify Disability |
|-------------------|-----------------|--------------------------------------|
| Sylvia Harrington | No Disability | N/A |
| Sylvia Harrington | No Disability | N/A |
| Laura Harrington | Developmental | Problems hearing/responding to voice |

- a. This pane contains *Income Information* and *Disability Information* for the Referral's Household Members.



7. *Early Head Start and Early Head Start Related* pane:

- a. This pane contains questions used by Allegheny Link staff to determine consumer eligibility for Early Head Start and Head Start.

This pane includes the following yes/no questions: *Foster Care Involvement?*, *Are you receiving TANF benefits?*, *Are you homeless or doubled up?* and *Do you have a concern about your child's development?*

8. *Alliance Questions* pane:

- a. This pane contains questions used by Allegheny Link staff to determine consumer eligibility for Alliance for Infants and Toddlers referrals.

This pane includes the following yes/no questions: *Involved in Children, Youth, and Families (CYF)?*, *Are you experiencing depression, postpartum depression, anxiety, or anything like that?*, *Are you or have you ever been homeless?*, *Has your child received care in a hospital NICU (Neonatal Intensive Care Unit)?*, *Did your child have a birth weight under 3lbs 5ozs (1,000 grams)?*, *Did your child have confirmed high levels of lead (10 and above)?*, and *Was your child prenatally exposed to drugs or alcohol?*

Note: Allegheny LINK Service Coordinators will not ask callers whether they are involved with CYF but rather use DHS' Data Warehouse to determine this information.

If an answer is blank then the answer is either unknown or the caller declined to answer.



Referral – Other Referrals screen panes

Allegheny County Home Visiting Portal Amber Knight ▾

[Return to Dashboard](#) [Contact Info](#) [Referral Details](#) [Other Referrals](#)

Other Referrals

- 1 [Referral Summary](#)
- 2 [Household Information](#)
- 3 [Referral Details](#)

1. *Referral Summary* pane (present on all Referral screens).
2. *Household Information* pane (present on all Referral screens).
3. *Referral Details* pane:

| ▼ Referral Details | | | | |
|--------------------|-------------|--|-------------------|---------------|
| Referral Date | Referral ID | Program Name | Program Contact # | Client Status |
| 01/05/2016 | 502 | Early Head Start (AIU) | (412) 722-4188 | Pending |
| 01/05/2016 | 503 | Early Head Start (University of Pittsburgh Office of Child Development Family Foundations) | (412) 383-3367 | Pending |
| 01/05/2016 | 504 | Duquesne Family Center | (412) 466-5300 | Pending |
| 01/05/2016 | 517 | Special Supplemental Nutrition Program for Women, Infants and Children | (412) 350-3824 | Pending |

- a. This pane contains a list of Referrals made on behalf of this consumer to Home Visiting providers and the *Client Status* of these Referrals.

This information can be used to help programs coordinate efforts if a client decides to enroll in two programs. Alternatively it can help a program prioritize referrals.



Documenting a Referral's Status

The *Referral Status* can be updated from the *Referral Summary* pane which is the first pane viewable on all of the Referral screens.

▼ Referral Summary

| | | | |
|---------------|-------------|--------------------|------|
| Referral Date | Referral ID | Referral Status * | Save |
| 01/05/2016 | 501 | <i>i</i> Pending ▼ | |

*Note: The Home Visiting Portal does not have an automatic save function. To save any changes you must click the **Save** button.*

Basic definitions of the statuses can be viewed by clicking on the *i* next to the Referral Status drop-down.

Referral Status Description

Pending - Default status when a new referral is sent to your program

In Progress - Program representative reaches out to the client and/or begins working on the referral

Waitlist - Client is conditionally accepted to the program but there is a waitlist for the program

Enrolled - Referral is accepted and client is enrolled in the program

Not Enrolled - Client is not interested or otherwise not enrolled in the program

Close Case - Client leaves and/or completes the program



Close

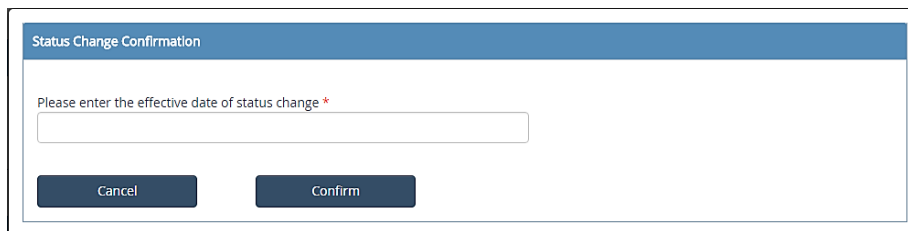


Important notes regarding Referral Statuses and Updates:

- Providers are asked to actively manage the status of their referrals as this information will be used for quality assurance monitoring and can potentially impact other system users (in those instances when a family has been referred to multiple programs).
- It is not necessary to have completed a home visit in order to indicate that a consumer has enrolled.
- If the referral includes information about the referring entity (who is not the consumer) home visitors are asked to follow up with this individual in order to "close the referral loop" and provide the opportunity for coordinated case management.
- Providers can opt in via the **Program Profiles** screen to receive the following email notifications:
 - a. An alert when your program has had one or more referrals in Pending status for 3 or more days.
 - b. A quarterly report listing clients listed as "Active" for greater than 6 months.
- Both emails are meant to help remind providers to actively manage the status of Referrals.

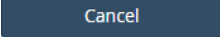
Before Enrollment

1. A Referral begins with a "Pending" Status. A Pending Referral can be updated to the following statuses:
 - a. *In Progress* - Default status when a new referral is sent to your program.
 - i. Click  to complete the *Referral Status* update.
 - b. *Enrolled* - Referral is accepted and client is enrolled in the program.
 - i. Click  to complete the *Referral Status* update.
 - ii. A *Status Change Confirmation* pop-up will appear.



The image shows a "Status Change Confirmation" pop-up window. It has a blue header bar with the title "Status Change Confirmation". Below the header, there is a text prompt: "Please enter the effective date of status change *". Underneath the prompt is a white text input field. At the bottom of the pop-up, there are two buttons: "Cancel" on the left and "Confirm" on the right.

Enter the *Enrollment Date* and click .

If the *Referral Status* was selected in error click  to close the pop-up without confirming or saving the status. A different *Referral Status* can then be selected and saved.



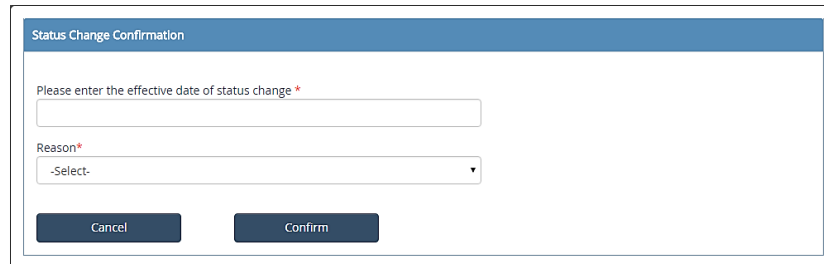
c. *Waitlist* - Client is conditionally accepted to the program but there is a waitlist for the program.

i. Click  to complete the *Referral Status* update.

d. *Not Enrolled* - Client is not interested or otherwise not enrolled in the program.

i. Click  to complete the *Referral Status* update.

ii. A *Status Change Confirmation* pop-up will appear.

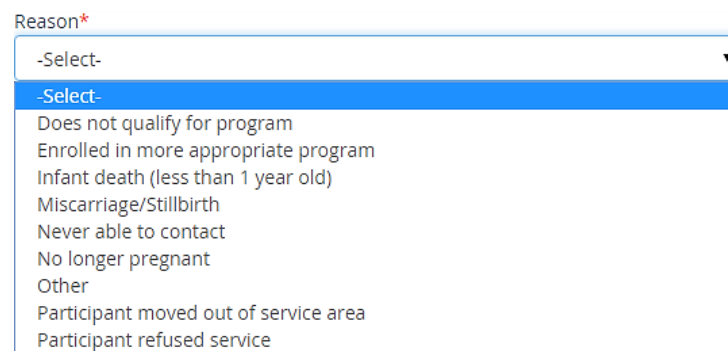


The form is titled "Status Change Confirmation". It contains a text input field for "Please enter the effective date of status change *", a dropdown menu for "Reason*" with "-Select-" as the current selection, and two buttons at the bottom: "Cancel" and "Confirm".

Enter the *effective date of status change*

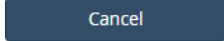
Select one of the following Reasons (listed alphabetically):

Does not qualify for program, Enrolled in more appropriate program, Infant death (less than 1 year old), Miscarriage/Stillbirth, Never able to contact, No longer pregnant, Other, Participant moved out of service area, or Participant refused service.



The dropdown menu is titled "Reason*" and shows a list of reasons: "-Select-", "-Select-", "Does not qualify for program", "Enrolled in more appropriate program", "Infant death (less than 1 year old)", "Miscarriage/Stillbirth", "Never able to contact", "No longer pregnant", "Other", "Participant moved out of service area", and "Participant refused service".

Click .

If the *Referral Status* was selected in error click  to close the pop-up without confirming or saving the status. A different *Referral Status* can then be selected and saved.

2. Referrals with a status of *Pending*, *In Progress* or *Waitlist* can be accessed via the ***Pending Referrals*** list screen.
3. Referrals with a status of Enrolled can be accessed via the ***Active Referrals*** list screen.
4. Referrals of any status can be accessed via the ***Search*** screen.



Accepted Referrals List Screen

The **Accepted Referrals** screen contains all of the Referrals for the user's Provider agencies with a *Referral Status* of Enrolled.

Accepted Referrals

Allegheny County Home Visiting Portal Amber Knight

My Program Dashboard Pending Referrals **Accepted Referrals** Search Program Profiles

Accepted Referrals

Search within Referrals:

| Enrollment Date | Referral ID | Client First Name | Client Last Name | Referred By | Program Name | Status | Close Case |
|-----------------|----------------------|-------------------|------------------|----------------|--------------|----------|------------|
| 12/31/2015 | 1129 | Robert | Robinson | Bob Thompson | First Steps | Enrolled | |
| 1/4/2016 | 1215 | Kim | Scenario | Kim Scenario | First Steps | Enrolled | |
| 1/4/2016 | 1241 | Jennifer | Smith | Jennifer Smith | First Steps | Enrolled | |

Show entries First Previous **1** Next Last

Accessing the Accepted Referrals list

1. From **My Program Dashboard** the **Accepted Referrals** list screen can be accessed using the Navigation tiles at the top of the screen.
2. To return to the **Accepted Referrals** list screen when viewing a Referral the user must first navigate back to **My Program Dashboard** by clicking the **Return to Dashboard** navigation tile or the **Allegheny County Home Visiting Portal** header at the top of the screen.



Navigating the Accepted Referrals list

Allegheny County Home Visiting Portal Amber Knight

My Program Dashboard Pending Referrals **Accepted Referrals** Search Program Profiles

Accepted Referrals

A Search within Referrals:

| B Enrollment Date | Referral ID | Client First Name | Client Last Name | Referred By | Program Name | Status | D Close Case |
|--------------------------|-------------------------------|-------------------|------------------|----------------|--------------|----------|---------------------|
| 12/31/2015 | C 1129 | Robert | Robinson | Bob Thompson | First Steps | Enrolled | |
| 1/4/2016 | 1215 | Kim | Scenario | Kim Scenario | First Steps | Enrolled | |
| 1/4/2016 | 1241 | Jennifer | Smith | Jennifer Smith | First Steps | Enrolled | |

Show entries **E** First Previous 1 Next Last

1. Navigating the *Accepted Referrals* list:

- Use the *Search within Referrals* to search for a specific Referral or to filter the *Accepted Referrals* list.
- The *Accepted Referrals* grid can be sorted by any column header.
 - The list is pre-sorted by *Enrollment Date* (oldest to newest).
- To select a specific Referral click on the desired Referral's *Referral ID* in the *Accepted Referrals* grid. The Referral screens will then be displayed:

Referral Summary


Referral Date: Referral ID: Referral Status:

- From within the *Referral Summary* pane select *Close Case* in the *Referral Status* drop-down.
 - Click to complete the *Referral Status* update.
 - The *Case Closure Confirmation* pop-up will then appear.
- A Referral (Case) can also be closed directly from the *Accepted Referrals* list screen by clicking on the Close Case icon [].
 - The *Case Closure Confirmation* pop-up will then appear.
 - Pagination allows the user to navigate through multiple pages of referrals (depending on the length of the *Accepted Referrals* list).



Completing the Case Closure Confirmation pop-up

The form is titled "Case Closure Confirmation". It contains two input fields: a text box for "Please confirm client's date of departure from your program*" and a dropdown menu for "Reason for Departure*". Below these fields are two buttons: "Cancel" and "Confirm".

1. Enter the client's date of departure from your program. This field will default to today's date if the Close Case icon [] is clicked however the date can be edited if the client exited the program earlier than today's date.

2. Select the *Reason for Departure*:

Child aged out of program/Goals obtained, Child aged out of program/Transferred to program for older children, Infant death (less than 1 year old), Miscarriage/Stillbirth, Moved to more appropriate program, No contact with participant for extended period, No longer interested in services, No longer pregnant, Other, or Participant moved out of service area.

The dropdown menu is titled "Reason for Departure*". It shows a list of options: "-Select-", "-Select-", "Child aged out of program/Goals obtained", "Child aged out of program/Transferred to program for older children", "Infant death (less than 1 year old)", "Miscarriage/Stillbirth", "Moved to more appropriate program", "No contact with participant for extended period", "No longer interested in services", "No longer pregnant", "Other", and "Participant moved out of service area".

3. Click .
4. If *Case Closure* was selected in error click  to close the pop-up without closing the Referral (case).



Using the Search screen

The Search screen allows providers to generate Microsoft Excel reports and search for referrals of all statuses. Providers can enter all of the desired search criteria in the *Referral Search* fields and click the **Search** button to generate the search results and report.

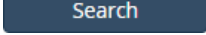
Using the Search Filters

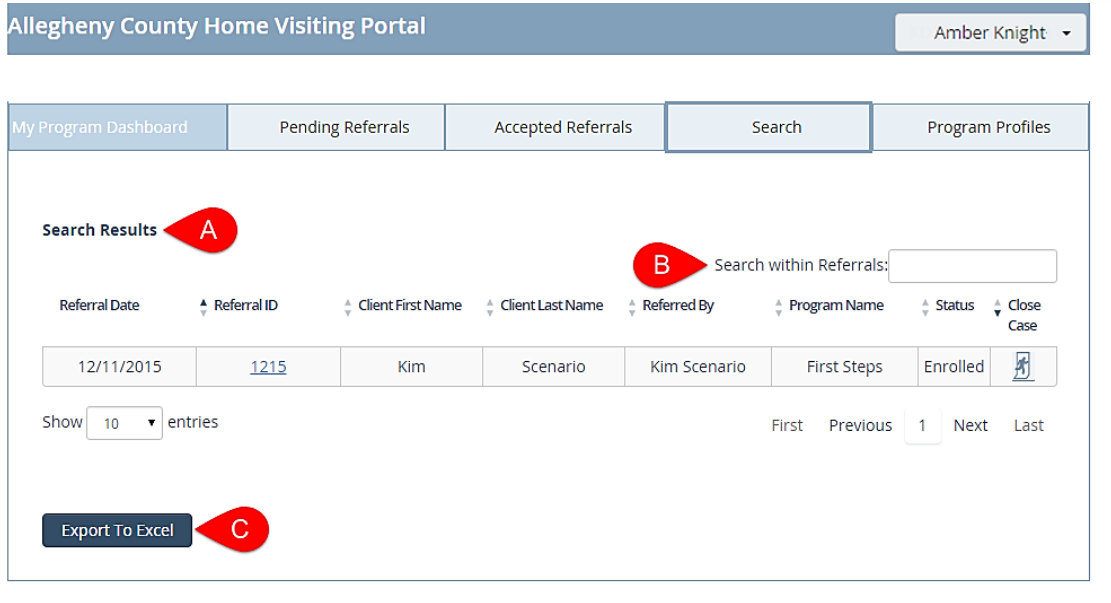
The screenshot shows the 'Allegheny County Home Visiting Portal' interface. At the top right, the user 'Amber Knight' is logged in. Below this is a navigation bar with tabs: 'My Program Dashboard', 'Pending Referrals', 'Accepted Referrals', 'Search' (which is highlighted), and 'Program Profiles'. The main content area is titled 'Referral Search'. It contains several input fields and dropdown menus, each with a red callout number: 1 points to the 'Referral ID' text box; 2 points to the 'Program Name' dropdown menu (currently showing '-Select-'); 3 points to the 'Client First Name' text box; 4 points to the 'Client Last Name' text box; 5 points to the 'Client Address (Street Name/City/ZIP)' text box; 6 points to the 'Client Phone' text box; 7 points to the 'Referral Date Sent From' text box; 8 points to the 'Referral Date Sent To' text box. Below these are two more dropdown menus: 'Status' (currently showing 'All') and 'Reason for closure' (currently showing 'All'). A 'Search' button is located at the bottom right of the form area.


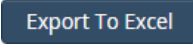
1. *Referral ID* – if the ID is known it can be entered here.
2. *Program Name* – this drop-down contains all of the Programs that the logged-in provider manages.
3. *Client First Name* and *Client Last Name* – Partial names can be entered here and the search will return all names containing the partial name entered.
4. *Client Address* – A partial or complete address can be entered here but at least 3 characters must be entered in order to search on the partial address.
5. *Client Phone* – Partial or complete phone numbers can be entered here.
6. *Referral Date Sent From* and *Referral Date Sent To* – these can be used individually or together and will return all Referrals sent by the Allegheny LINK within the date range entered.
7. *Status* – A specific *Referral Status* can be selected from this drop-down to search by. The status of "All" will return a list with any *Referral Status*.
8. *Reason for closure* – This drop-down can only be used if "Close Case" is selected in the *Status* drop-down.



Generating Reports and Reviewing the Search Results

1. Once the desired Search criteria have been entered click  to generate the Search results:



- a. The *Search Results* list can be navigated in the same way as the *Pending Referrals* list and the *Accepted referrals* list. This includes sorting the referrals, accessing a specific referral directly by clicking on the *Referral ID*, and even closing a Referral (case) that is currently enrolled by clicking on the Close Case icon [].
- b. The list can be filtered even further by using the *Search within Referrals* box.
- c. To generate an excel spreadsheet with all of the Search Results click . A Microsoft Excel spreadsheet will be downloaded containing all of the Search Results in this format:

| Referral Search Results | | | | | | |
|-------------------------|-------------|-------------------|------------------|--------------|--------------|----------|
| Referral Date | Referral ID | Client First Name | Client Last Name | Referred By | Program Name | Status |
| 12/11/2015 | 1215 | Kim | Scenario | Kim Scenario | First Steps | Enrolled |
| | | | | | | |
| | | | | | | |

Reminder: All of the information in this Report is considered confidential and should be treated with the same confidentiality as access to the Home Visiting Portal itself.

2. To Start a new Search or clear the information entered in the search filters click the **Search** navigation pane.