



Contact Notes – IL Job Aid

The *Contact Notes* screen is used to document any type of communication pertaining to the Youth and the applicable Independent Living Domains and Services. Progress on Transition Plan Action Steps can also be documented from this screen.

Youth who are active in Synergy in YSP (Youth Support Partners) and/or Dragonfly may also have contacts from these systems listed in the *Contact Notes* grid. IL Contact Notes will also appear in YSP and Dragonfly if the Youth is active in either system.

If the Youth is active with CYF the Contact Notes will be transmitted into the KIDS system and will appear on the **Contacts** page in the KIDS system.

Case Notes screen

The screenshot displays the 'Contact Notes' interface. The top section, 'Referral Summary - Susie Sunshine', includes fields for Referral Date (01/27/2017), Referral ID (55293), Referral Status (Open), Transition Planner (Sanfilippo, Mela), Educational Liaison (-Select-), 412 Youth Zone (-Select-), and Owner of P (Transition). Below this is the 'Case Contacts' section, which features a table of contacts. The table has columns for Contact Date, Client, Supports, Worker, Contact Type, and Contact Description. Two contacts are listed: one from 1/31/2017 with Susie Sunshine as the client and Amanda Hirsh as the worker, and another from 1/30/2017 with Susie Sunshine as the client and Samantha Murphy as the worker. The bottom of the screen shows a 'Show 10 entries' dropdown and a 'Next' button.

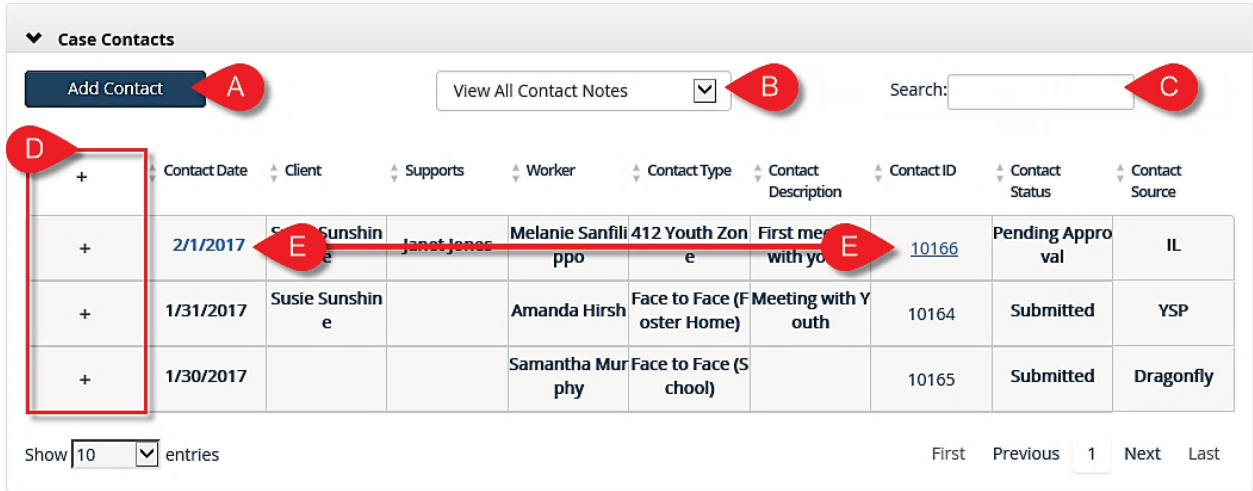
	Contact Date	Client	Supports	Worker	Contact Type	Contact Description
+	1/31/2017	Susie Sunshine		Amanda Hirsh	Face to Face (F Meeting w oster Home)	Youth
+	1/30/2017			Samantha Murphy	Face to Face (S chool)	

Navigation

- From the **Dashboard**: Locate the desired Referral and click on the *Last Contact Date* to navigate directly to the *Contact Notes* screen.
 - Or Click on the *Referral ID* to bring the Referral into focus
 - Then click on the **Contact Notes** tile.
- The **Previous** and **Next** buttons can be used to navigate up or down one screen within the Left Navigation tiles.

Case Contacts pane

1. Case Contacts pane:



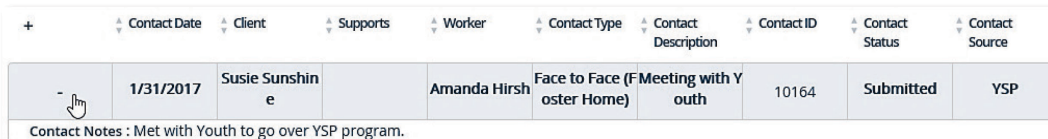
Case Contacts

Add Contact **A** **View All Contact Notes** **B** Search: **C**

	Contact Date	Client	Supports	Worker	Contact Type	Contact Description	Contact ID	Contact Status	Contact Source
D +	2/1/2017	Susie Sunshine	Janet Jones	Melanie Sanfilippo	412 Youth Zone	First meeting with youth	10166	Pending Approval	IL
+	1/31/2017	Susie Sunshine		Amanda Hirsh	Face to Face (Foster Home)	Meeting with Youth	10164	Submitted	YSP
+	1/30/2017			Samantha Murphy	Face to Face (School)		10165	Submitted	Dragonfly

Show 10 entries First Previous 1 Next Last

- To start documenting a new Contact click **Add Contact**.
- The *Contacts* grid contains Contacts for the Youth from Dragonfly, IL, and/or YSP (If the Youth is active in IL and/or YSP). To view only IL Contacts select "View My Contact Notes" from the drop-down. To view all Contacts, select "View All Contacts" from the drop-down.
- Users can search for a specific Contact or set of Contacts by using the *Search* field. Note: The search will only bring up information in the grid columns. The *Contact Notes* within the Contacts cannot be searched from this field.
- 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.

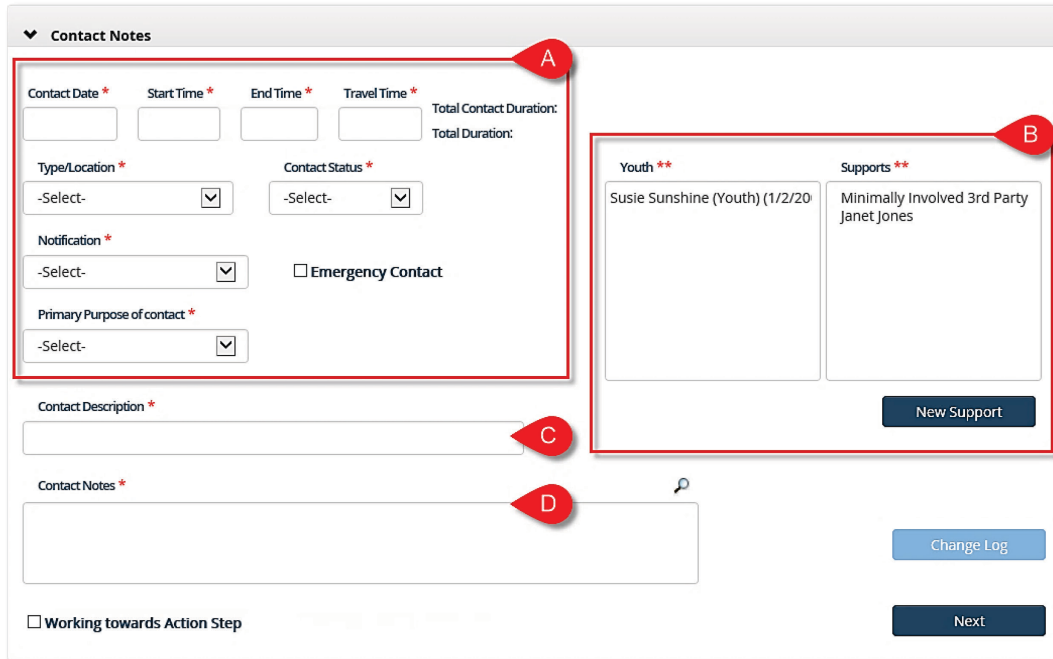


Contact Notes : Met with Youth to go over YSP program.

- 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.
- To view or update an existing Contact click on the *Contact Date* or *Contact ID* of the desired Contact in the *Case Contacts* grid.

Contact Activity


- The *Contact Activity* section is where the primary details of the Contact are documented. The *Contact Date*, *Youth*, *Supports*, *Worker* (user entering the Contact), *Contact Type*, *Contact Description* will all pull in to the Case Contacts grid. If the Youth is CYF active the *Contact Activity* section will push to the KIDS System's **Contacts** screen upon *Contact Note* submission.





The screenshot shows the 'Contact Notes' form. Callout A points to the top section containing input fields for 'Contact Date', 'Start Time', 'End Time', 'Travel Time', and calculated 'Total Contact Duration' and 'Total Duration'. Callout B points to the 'Youth' and 'Supports' sections, which are currently populated with 'Susie Sunshine (Youth) (1/2/20)' and 'Minimally Involved 3rd Party Janet Jones' respectively, and a 'New Support' button. Callout C points to the 'Contact Description' text area. Callout D points to the 'Contact Notes' text area. Other visible elements include dropdown menus for 'Type/Location', 'Contact Status', 'Notification', and 'Primary Purpose of contact', an 'Emergency Contact' checkbox, a 'Change Log' button, a 'Next' button, and a 'Working towards Action Step' checkbox.

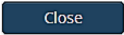
- Contact Information:
 - Contact Date*: Enter the date that the Contact occurred. This cannot be future dated.
 - Start Time*, *End Time*, and *Travel Time*: Enter the time of day that the Contact started and ended as well as the amount of travel time. If there was no travel time enter all zeros. The *Total Contact Duration* and *Total Duration* will calculate based on the *Start Time*, *End Time*, and *Travel Time* entered.
 - Type/Location*: Select the method of Contact from this drop-down.
 - Contact Status*: Select whether the Contact was attempted or completed.
 - Notification*: Select whether the Contact was announced or unannounced.
 - Primary Purpose of Contact*: Select the Contact purpose from this drop-down. If "Critical Incident" is selected the ☒ *Emergency Contact* checkbox will automatically be checked. This will flag the Contact as an Emergency Contact when it is transmitted back into KIDS. This does not replace the need to notify the CYF caseworker directly regarding any safety concerns.




- b. *Youth and Supports*: Click to select the Youth and/or Supports who participated in the Contact from these half mandatory multi-select boxes.
- To select more than one Support, hold down the **[Ctrl]** key while clicking on each of the Supports who were involved in the contact.
 - If an individual is not listed in the *Supports* box they can be added by clicking .

See **Page 10** of this Job Aid for instructions on how to add a new Support.

- c. *Contact Description*: Enter a brief description of the Contact.
- d. *Contact Notes*: Enter the narrative of the Contact here.
2. *Working towards Action Step*: This checkbox is no longer used and remains for historical purposes. Previously if any Action Steps from the Youth's Transition Plan were addressed during this Contact the ☒ *Working towards Action Step* checkbox would be checked and the Progress section of the Contact would be documented.
3. The  button will become dark blue (active) when any changes have been made to the contact after the contact has been saved for the first time. Clicking on the  button will open the *Change Log* pop-up. In this pop-up the date of each change (*Transaction Date*), *Change Details*, and *User* who made the change will be listed.

Change Log		
Transaction Date	Change Details	User
07/01/2016	Field "Referral Status" Changed from Not Selected to Completed.	Jane Smith
07/01/2016	Field "Referral Category" Changed from Not Selected to Basic Needs/Emergency Food.	Jane Smith
Show <input type="text" value="10"/> entries		
First Previous <input type="text" value="1"/> Next Last		
		

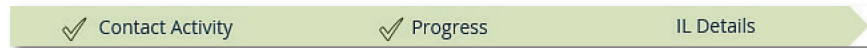
Click  to close the *Change Log* pop-up.

4. Click  to continue to the next section of the Contact. If the ☒ *Working towards Action Step* checkbox has been checked the *Progress* section will be displayed (for historical contacts only) If it is not checked, the *Progress* section will be skipped and the *IL Details* section will be displayed.



Navigation Bar

The *Contact Notes* Navigation Bar will show the user which sections have been completed.



Progress

1. **Contact Progress**: This section of the contact is read-only and is only viewable on historical contacts where the ☒ *Working towards Action Step* checkbox has been checked.

Outcome Title	Action Step	Domain	Status	Target Date	Completion Date
Plan A	October will apply to Action Housing.	Housing	In Progress	3/15/2017 12:00:00 AM	

New

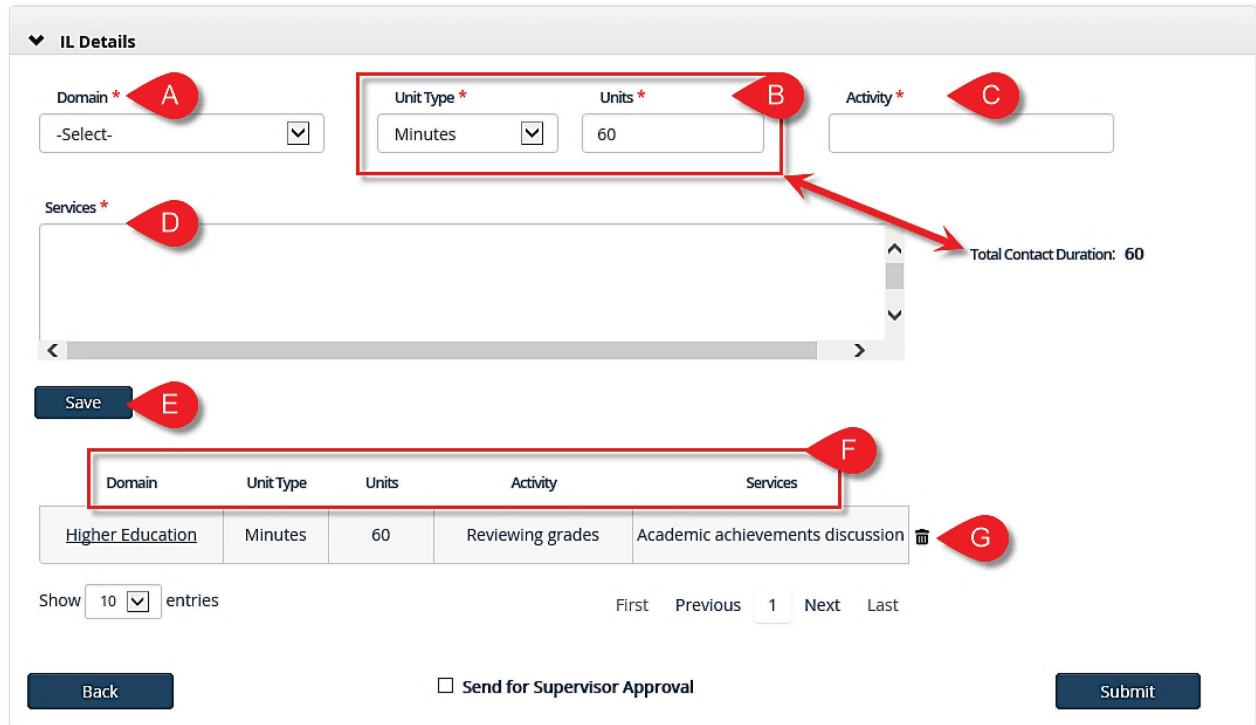
Back

Next

2. Click **Next** to navigate forward to the *IL Details* section.

IL Details

1. **IL Details**: The *IL Details* section captures all of the IL Service Logs (Domains and Services) associated with this Contact.



The screenshot shows the 'IL Details' form. Callout A points to the 'Domain' dropdown menu. Callout B points to the 'Unit Type' and 'Units' fields, which are highlighted with a red box. Callout C points to the 'Activity' text input field. Callout D points to the 'Services' MultiSelect box. Callout E points to the 'Save' button. Callout F points to the table header row. Callout G points to the table row for 'Higher Education'.

Form Fields:

- Domain * (A): -Select- (dropdown)
- Unit Type * (B): Minutes (dropdown)
- Units * (B): 60 (text input)
- Activity * (C): (text input)
- Services * (D): (MultiSelect box)
- Save (E): (button)
- Total Contact Duration: 60


Domain	Unit Type	Units	Activity	Services
Higher Education	Minutes	60	Reviewing grades	Academic achievements discussion

Show 10 entries First Previous 1 Next Last

Back ☐ Send for Supervisor Approval Submit

- Domain:** Select a Domain from the drop-down. The list of possible Services associated with the selected Domain will be displayed in the *Services* MultiSelect box (d).
- Unit Type and Units:** The Unit Type and Units will automatically default to the Total Contact Duration calculated in the *Contact Activity* section. The *Total Contact Duration* (in minutes) is also displayed on this screen.
 - Example: A class is 60 minutes long. Parenting strategies are discussed for 20 minutes. College applications are discussed for 40 minutes. The user would document 2 Domains: 20 minutes of Parenting and 40 Minutes of Higher Education.
 - The Domain times added together should not exceed the Total Contact Duration. For example: A 1 hour Contact should not have 2 hours of Domains/Services documented.
- Activity:** Enter a short description of the part of the contact that applied to this specific Domain.



- d. **Services:** Select all of the Services that apply to this Domain from the MultiSelect box. To select more than one Service, hold down the **[Ctrl]** key while clicking on each of the applicable Services.
- e. Click **Save** to add the Domain/Services to the grid.
- f. All of the saved IL Service Logs for this Contact will display in the grid at the bottom of the page. To view the details of a specific log, click on the name of the Domain in the grid.
- g. To delete an entry, click the Delete Icon [] to the right of the entry in the grid. A *Confirm Delete* pop-up will appear:

Confirm Delete

Clicking Yes will delete this record.
Are you sure you want to proceed?

Yes **No**

Clicking **Yes** will delete the entry.

Clicking **No** will cancel the action and the entry will not be deleted.

2. Once all of the Contact sections are complete the Contact can then be submitted.

- a. Clicking **Back** will navigate to the previous section of the Contact.
- b. Click **Submit** to save the Contact.
 - i. If the Contact requires approval, the ☒ *Send for Supervisor Approval* checkbox must be checked before **Submit** can be clicked.
 - ii. If no approval is required, the Contact will automatically push into the KIDS System for CYF active Youth. The Contact will also appear in YSP and/or Dragonfly if the Youth is active with either program.
 1. If approval is required, the Contact will not push into any other systems or programs until it has been approved. The Contact status (draft, approved, rejected) is displayed in the *Case Contacts* grid.



- iii. Upon clicking **Submit** one of the following informational pop-ups may appear:
1. "You have not documented the entire contact. Do you wish to Submit?"

A screenshot of a web-based pop-up dialog box titled "Confirm IL Log". The dialog has a light gray header bar with the title. Below the header, the text reads: "You have not documented the entire contact. Do you wish to Submit?". At the bottom of the dialog, there are two dark blue buttons with white text: "Yes" on the left and "No" on the right.

This pop-up is letting the user know that the documented IL Service Logs do not cover the entire length of the Contact based on the amount of time calculated in the *Total Contact Duration*.

2. "You have documented more time than the length of your contact. Do you wish to Submit?"

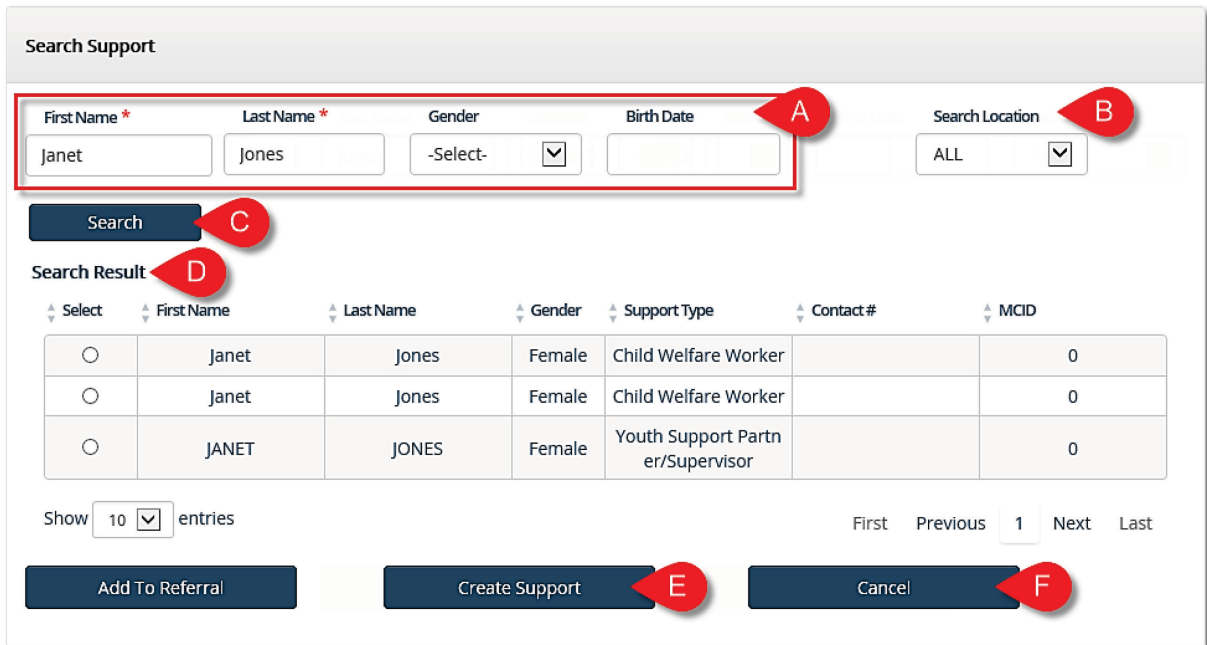
A screenshot of a web-based pop-up dialog box titled "Confirm IL Log". The dialog has a light gray header bar with the title. Below the header, the text reads: "You have documented more time than the length of your contact. Do you wish to Submit?". At the bottom of the dialog, there are two dark blue buttons with white text: "Yes" on the left and "No" on the right.

This pop-up is letting the user know that the documented IL Service Logs do cover more time than the entire length of the Contact based on the amount of time calculated in the *Total Contact Duration*.

3. Clicking **Yes** on the pop-up will submit the Contact.
Clicking **No** will cancel the action and the Contact will not be submitted.

Creating a New Support

- To create a new Support, click the **Add Support** button. The *Search Support* pop-up will appear:



Search Support

First Name * Last Name * Gender Birth Date Search Location

Janet Jones -Select- ALL

Search

Search Result

Select	First Name	Last Name	Gender	Support Type	Contact #	MCID
<input type="radio"/>	Janet	Jones	Female	Child Welfare Worker		0
<input type="radio"/>	Janet	Jones	Female	Child Welfare Worker		0
<input type="radio"/>	JANET	JONES	Female	Youth Support Partner/Supervisor		0

Show 10 entries First Previous 1 Next Last

Add To Referral **Create Support** **Cancel**

- Enter the *First Name* and *Last Name*. For Natural Supports enter (if known) *Gender* and *Birth Date*.
- Select the *Search Location*. Supports can be searched for in all of Synergy (Enterprise) or only in a specific program such as DHSSSP, YSP or HCM. The location defaults to "ALL".
- Click the **Search** button to locate possible matches in the system. A list of possible matches will display in the *Search Result* grid.
- Review the results to determine whether the Support is one of the individuals in the *Search Result* grid.

Search Result

Select	First Name	Last Name	Gender	Support Type	Contact #	MCID
<input checked="" type="radio"/>	Janet	Jones	Female	Child Welfare Worker		0
<input type="radio"/>	Janet	Jones	Female	Child Welfare Worker		0

- If there is a match in the *Search Results* grid click the radio button next to the desired person's name in the *Search Results* grid and then click **Add to Referral**.
- If none of the results match the person being added, click **Create Support** without selecting anyone from the *Search Results* grid.
- To close the *Search Supports* pop-up without adding a support click **Cancel**.



Completing the Support pop-up

1. When **Create Support** or **Add to Referral** is clicked the *Supports* pop-up will appear.

The screenshot shows a 'Supports' pop-up form. It contains several sections: 'Support Category' and 'Support Type' dropdowns; 'Business Name' and 'Prefix' text boxes; 'First Name', 'Middle Name', 'Last Name', and 'Birth Date' text boxes; 'Gender' dropdown; 'Email' text box; 'SSN' text box; 'Active' dropdown (Yes/No); and three radio button questions about youth involvement. Below these is an 'Address Details' section with a table showing 'No data available in table'. At the bottom are 'Save' and 'Cancel' buttons. A 'Validate Address' button is also present next to the address fields.

Supports

Support Category *
-Select- ▼

Support Type
-Select- ▼

Business Name
Prefix

First Name *
Middle Name
Last Name
Birth Date

Gender *
-Select- ▼

Email

SSN

Active *
Yes ▼

Notes

Does the Youth want this person to be invited to their meetings? *
☐ Yes ☐ No ☐ N/A

Does the Youth want this person to be explored as a possible placement option? *
☐ Yes ☐ No ☐ N/A

Does the Youth want this person to be contacted for discharge surveys? *
(Applicable only for YVLifeSet)
☐ Yes ☐ No

Address Phone

Address Details

Address Type	Address Summary	Primary	Validated
No data available in table			

Primary Address Address Type * Address 1 * Address 2 City

-Select- ▼ -Select- ▼

County Neighborhood/Municipality State Zip Code Extension

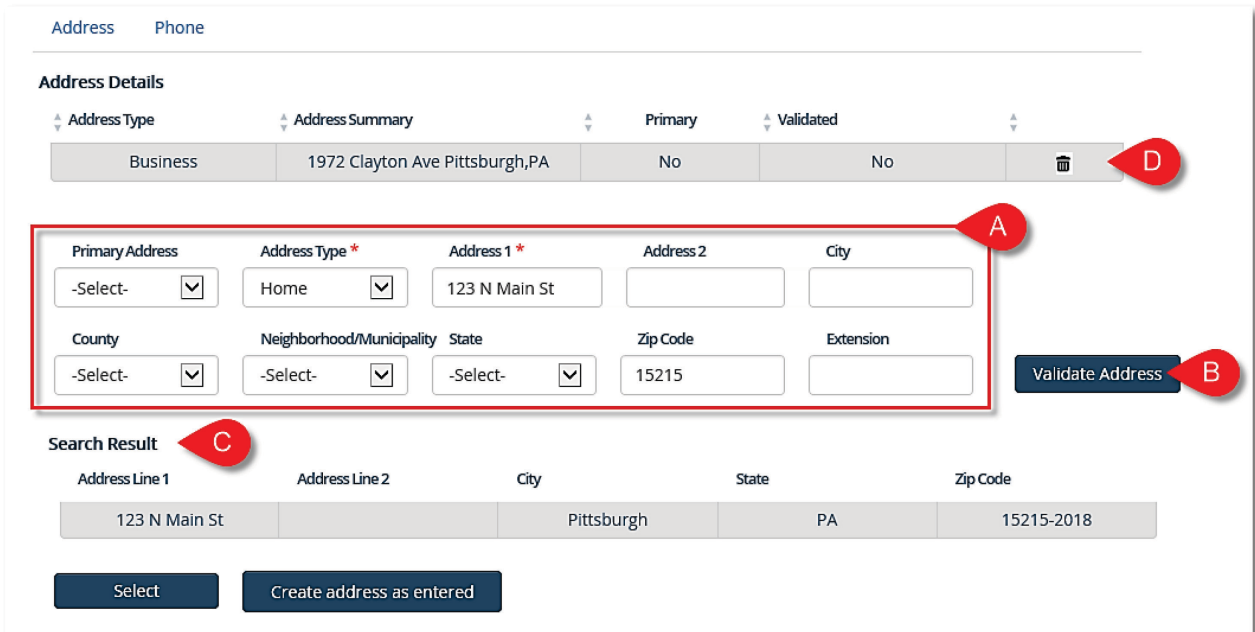
-Select- ▼ -Select- ▼ -Select- ▼

Validate Address


Save Cancel

2. Enter all of the relevant information for this Support in the *Supports* pop-up.
- The Support can be made Active or Inactive at any time by selecting "Yes" or "No" from the *Active* drop-down.
 - Does the Youth want this person to be contacted for discharge surveys?* is only mandatory when the user entering the Support is a YVLifeSet user.
3. When the entire *Supports* pop-up is completed click **Save** at the bottom of the pop-up to save the information entered or changed.
4. Clicking **Cancel** at the bottom of the pop-up will close the pop-up without saving any information entered or changed.

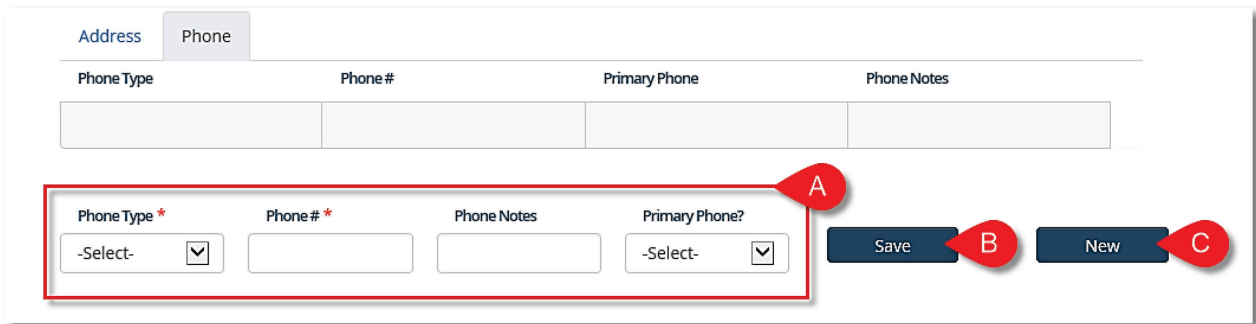
5. Multiple addresses can be entered for the Support. The Support can also be saved without entering an address.




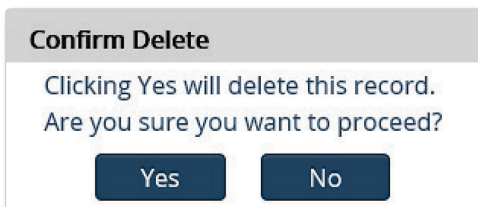
The screenshot shows the 'Address' tab of a web application. At the top, there are tabs for 'Address' and 'Phone'. Below is the 'Address Details' section, which contains a table with columns: Address Type, Address Summary, Primary, Validated, and an action icon. The first row shows 'Business' as the address type, '1972 Clayton Ave Pittsburgh, PA' as the summary, 'No' for both Primary and Validated, and a delete icon (callout D). Below this is a form for adding a new address (callout A). The form has two rows of fields. The first row includes 'Primary Address' (a dropdown), 'Address Type *' (a dropdown with 'Home' selected), 'Address 1 *' (text input with '123 N Main St'), 'Address 2' (text input), and 'City' (text input). The second row includes 'County' (a dropdown), 'Neighborhood/Municipality' (a dropdown), 'State' (a dropdown), 'Zip Code' (text input with '15215'), and 'Extension' (text input). To the right of the form is a 'Validate Address' button (callout B). Below the form is the 'Search Result' section (callout C), which contains a table with columns: Address Line 1, Address Line 2, City, State, and Zip Code. The first row shows '123 N Main St', an empty field, 'Pittsburgh', 'PA', and '15215-2018'. Below the table are two buttons: 'Select' and 'Create address as entered'. The 'Create address as entered' button is highlighted with a red box.

- To enter a new address:
 - Select whether or not the address is the individual's *Primary Address*, select the *Address Type*, and enter all of the known address information.
- Click **Validate Address**.
- If the *Search Result* list includes the desired address, click on the correct address in the grid and Click **Select**.
 - If the Correct address is not in the Search Result list, the *Address Information* can be updated and searched again. To do so, edit the *Address Information* and click **Validate Address**.
 - If, after searching again, the address cannot be located in the *Search Result* list, the address can still be saved without validation by clicking **Create address as entered**. The address will appear in the *Address* grid with a "No" in the *Validated?* column to indicate that the Address has not been validated.
- If an address has been added in error, click the Delete Icon [] to the right of the address in the *Address* grid.
 - A *Confirm Delete* pop-up will appear: Clicking **Yes** will delete the entry. Clicking **No** will cancel the action and the entry will not be deleted.

6. Multiple phone numbers can be entered for the Support as well. The Support can also be saved without entering a phone number.



- To add a new phone number, click on the *Phone* tab, enter all of the known phone information and click **Save** to add this phone number to the *Phone* grid.
 - To edit an existing phone number, click on the *Phone Type* for the desired number in the grid.
 - To enter additional phone numbers, click **New**.
7. If a phone number has been added in error, click the Delete Icon [] to the right of the phone number in the *Phone* grid. A *Confirm Delete* pop-up will appear:



Clicking **Yes** will delete the entry.

Clicking **No** will cancel the action and the entry will not be deleted.

Note: Only one Address and only one Phone number can be marked as Primary at a time.

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>