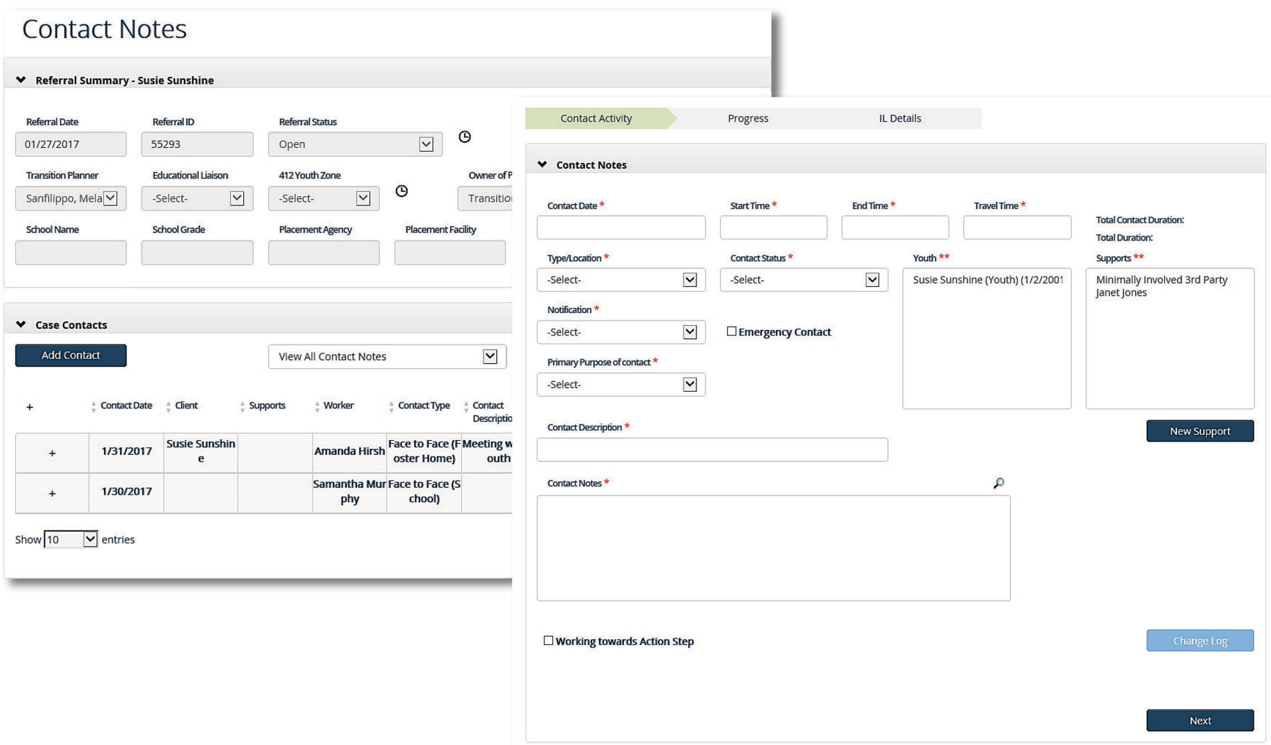
Contact Notes – IL Job Aid

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



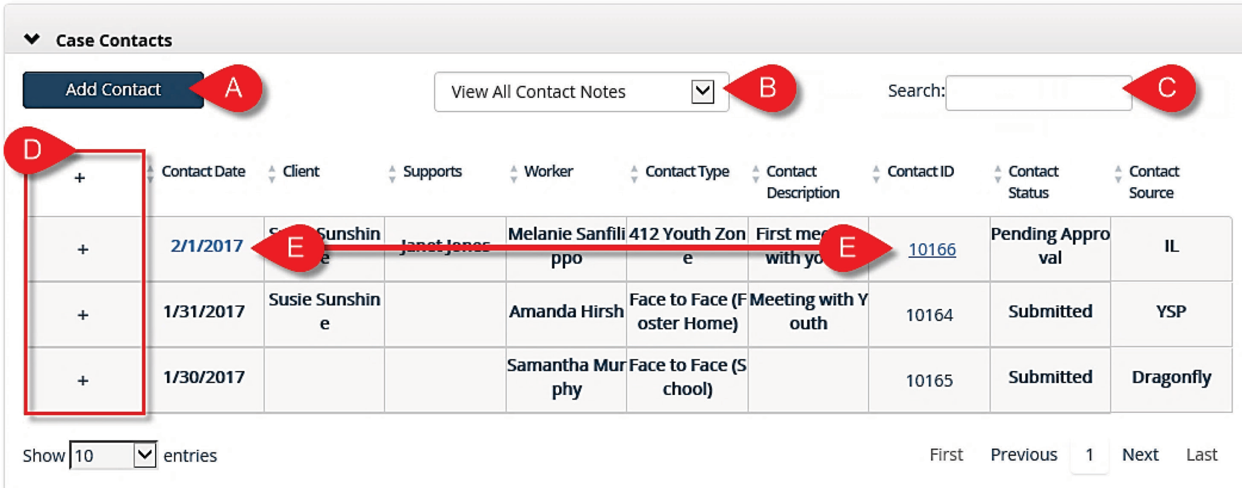
Navigation

1. From the Dashboard: Locate the desired Referral and click on the *Last Contact Date* to navigate directly to the *Contact Notes* screen.
   a. Or Click on the *Referral ID* to bring the Referral into focus
      i. Then click on the **Contact Notes** tile.

2. 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:

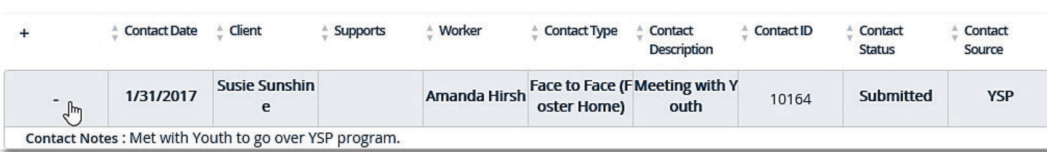


a. To start documenting a new Contact click **Add Contact**.

b. 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.

c. 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.

d. 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.

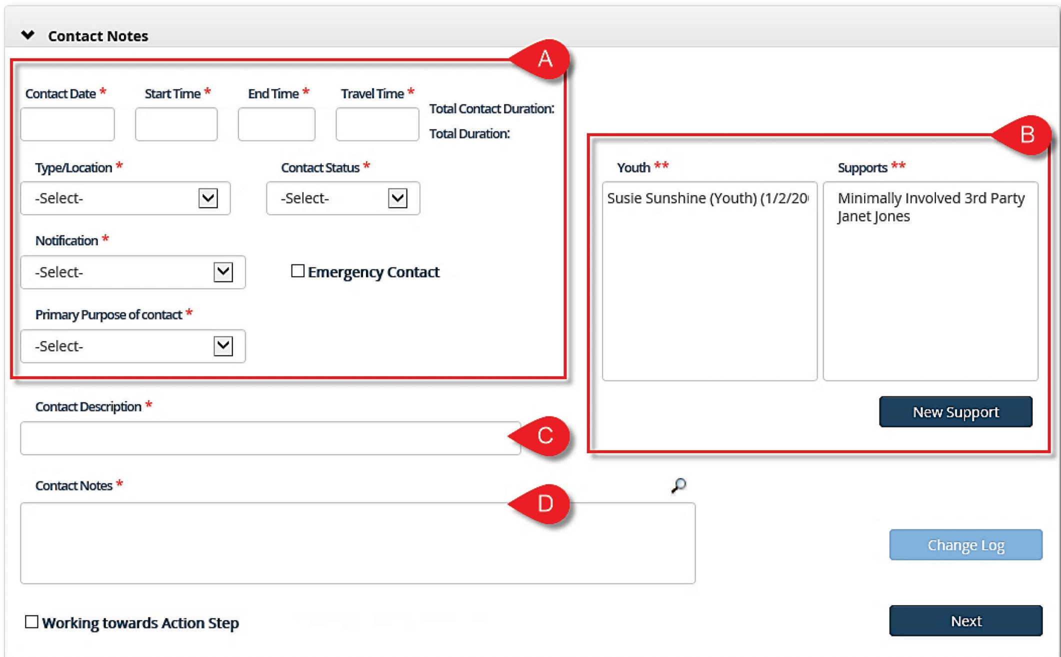


i. To view the *Contact Notes* for all of the Contacts in the current page of the grid click on the [**+**] above the grid. To collapse all of the *Contact Notes* click on the [**-**] that now appears above the grid.

e. 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

1. 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.



a. Contact Information:
   i. *Contact Date*: Enter the date that the Contact occurred. This cannot be future dated.

   ii. *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.

   iii. *Type/Location*: Select the method of Contact from this drop-down.

   iv. *Contact Status:* Select whether the Contact was attempted or completed.

   v. *Notification*: Select whether the Contact was announced or unannounced.

   vi. *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.

   i. To select more than one Support, hold down the **[Ctrl]** key while clicking on each of the Supports who were involved in the contact.

   ii. If an in individual is not listed in the *Supports* box they can be added by clicking **New Support**.

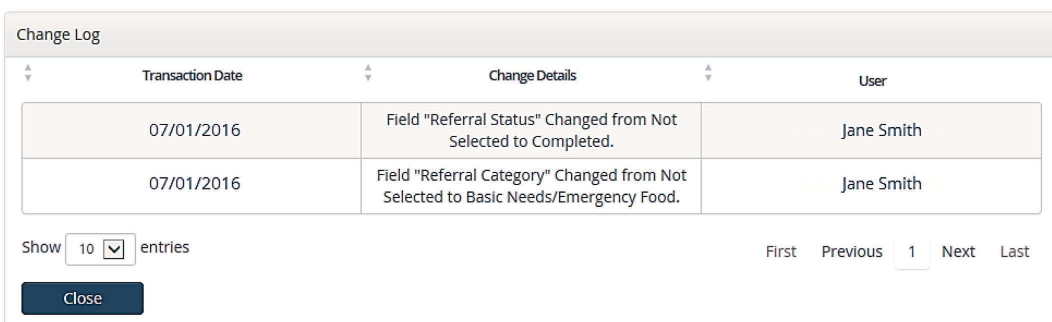
> *See **Page 10** of this Job Aid for instructions on how to add a new Support.*

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 **Change Log** 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 **Change Log** 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 10 entries   First Previous 1 Next Last

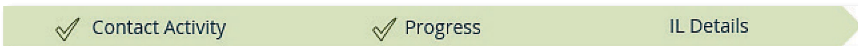
Close

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

4. Click **Next** 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.

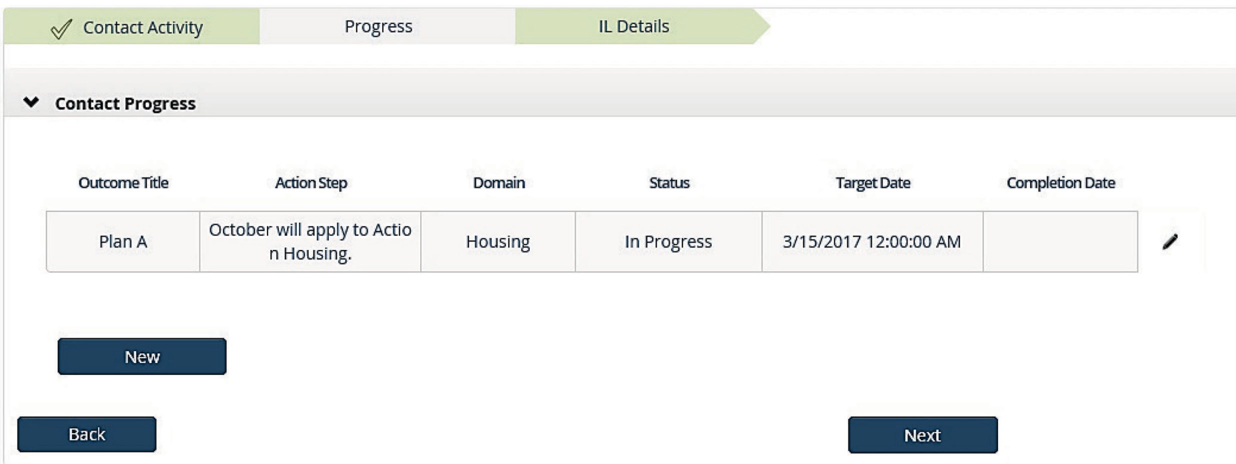
Navigation Bar

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



Progress

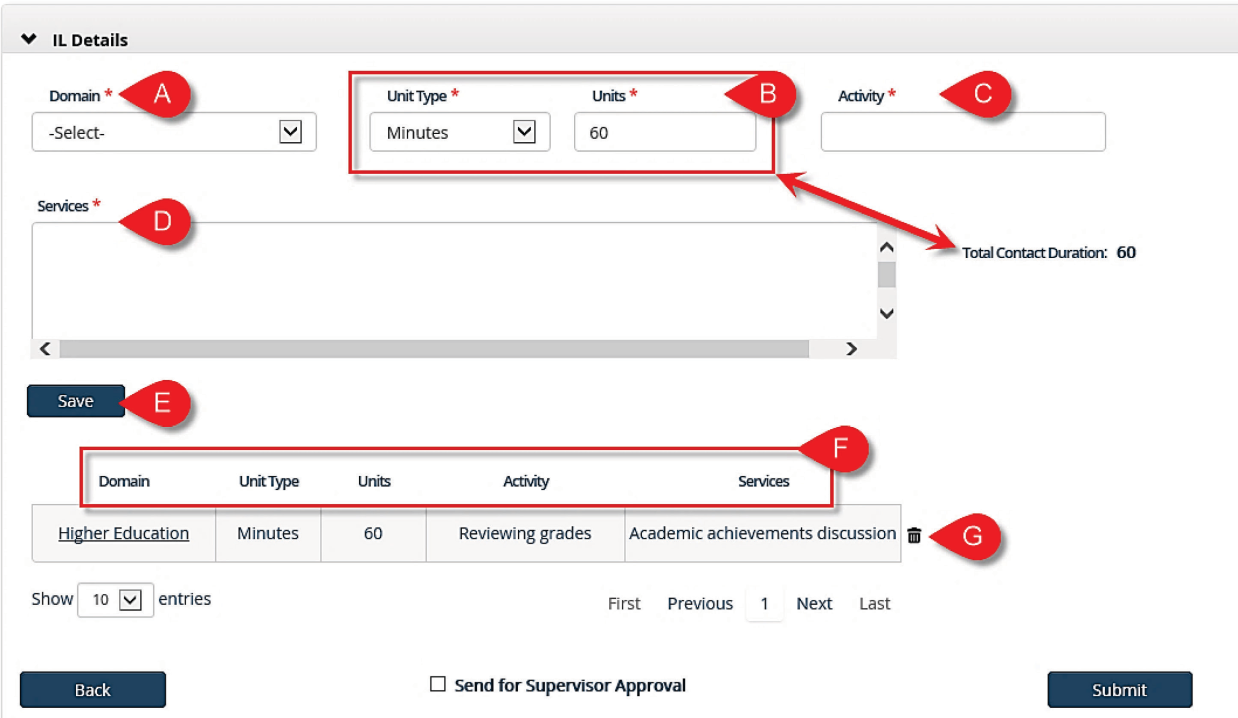
1. Contact Progress: This section of the contact is read-only and is only viewable on historical contacts where the ☑ *Working towards Action Step* checkbox has been checked.



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.



a. *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).

b. *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.

   i. 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.

   ii. 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.

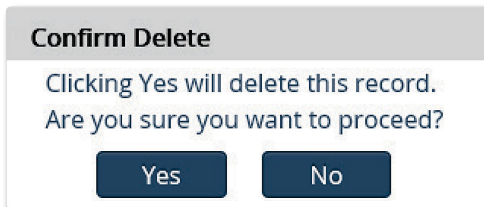
c. *Activity*: Enter a short description of the part of the contact that applied to this specific Domain.

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:



Clicking Yes will delete the entry.

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

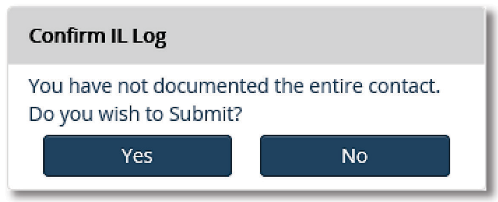
2. Once all of the Contact sections are complete the Contact can then be submitted.
   a. Clicking Back will navigate to the previous section of the Contact.

   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.

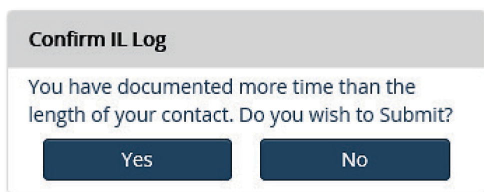
iii. Upon clicking **Submit** one of the following informational pop-ups may appear:

1. "You have not documented the entire contact. Do you wish to Submit?"



   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?"



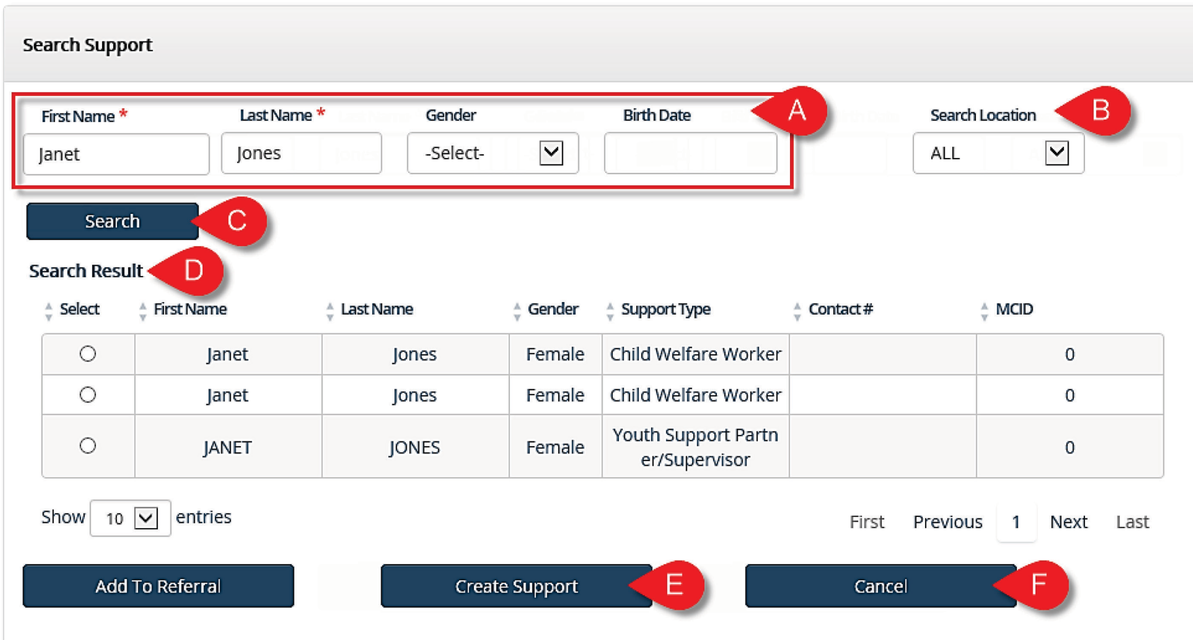
   This pop-up is letting the user know that the documented IL Service Logs do cover more time than the entire length of the Contact based on the amount of time calculated in the *Total Contact Duration*.

3. Clicking **Yes** on the pop-up will submit the Contact.

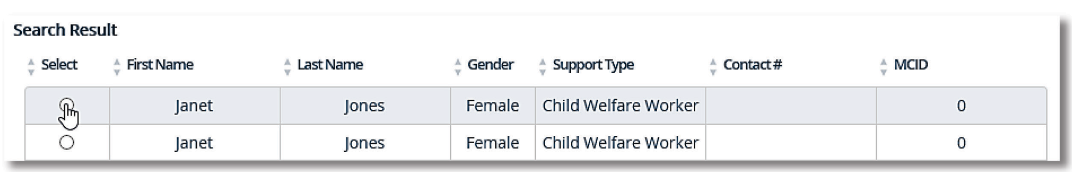
   Clicking **No** will cancel the action and the Contact will not be submitted.

Creating a New Support

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



a. Enter the *First Name* and *Last Name.* For Natural Supports enter (if known) *Gender* and *Birth Date*.
b. 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".
c. Click the **Search** button to locate possible matches in the system. A list of possible matches will display in the *Search Result* grid.
d. Review the results to determine whether the Support is one of the individuals in the *Search Result* grid.

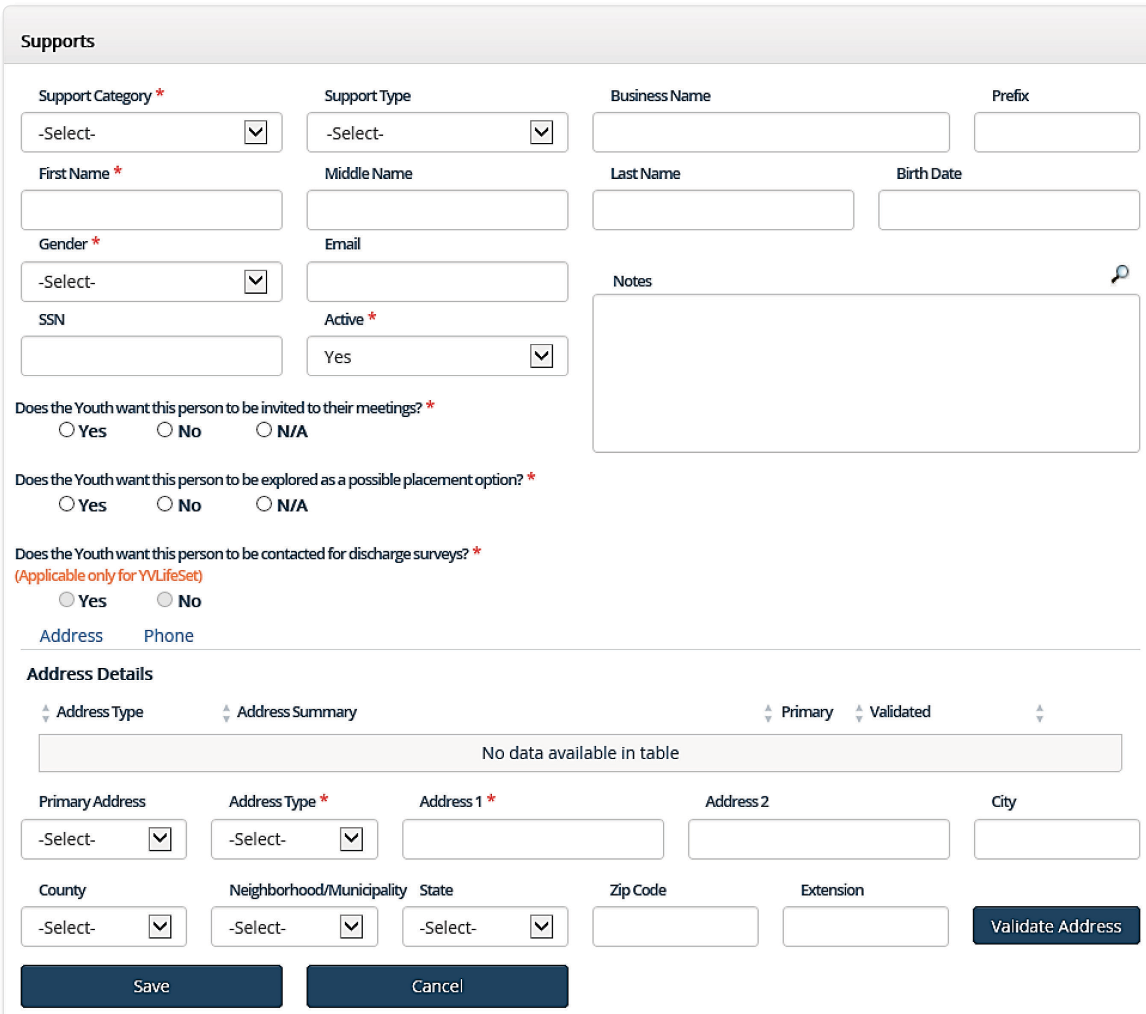


i. If there is a match in the *Search Results* grid click the radio button next to the desired person's name in the *Search Results* grid and then click **Add to Referral**.

e. If none of the results match the person being added, click **Create Support** without selecting anyone from the *Search Results* grid.
f. 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.

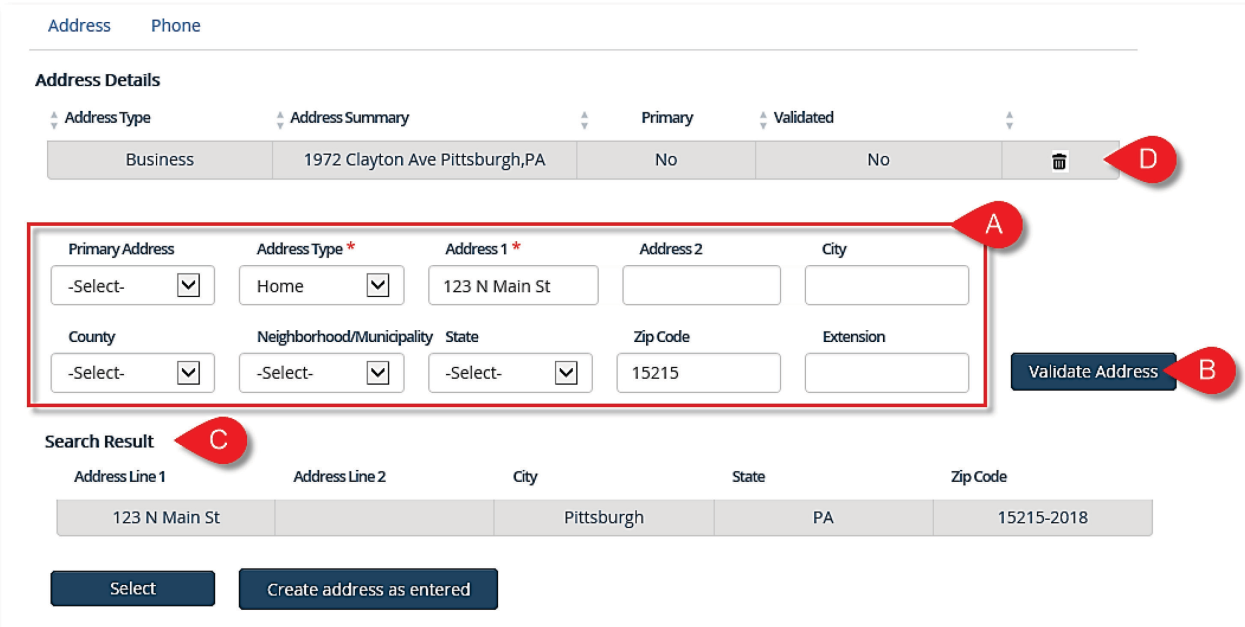


2. Enter all of the relevant information for this Support in the *Supports* pop-up.
   a. The Support can be made Active or Inactive at any time by selecting "Yes" or "No" from the *Active* drop-down.
   b. *Does the Youth want this person to be contacted for discharge surveys? is* only mandatory when 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.



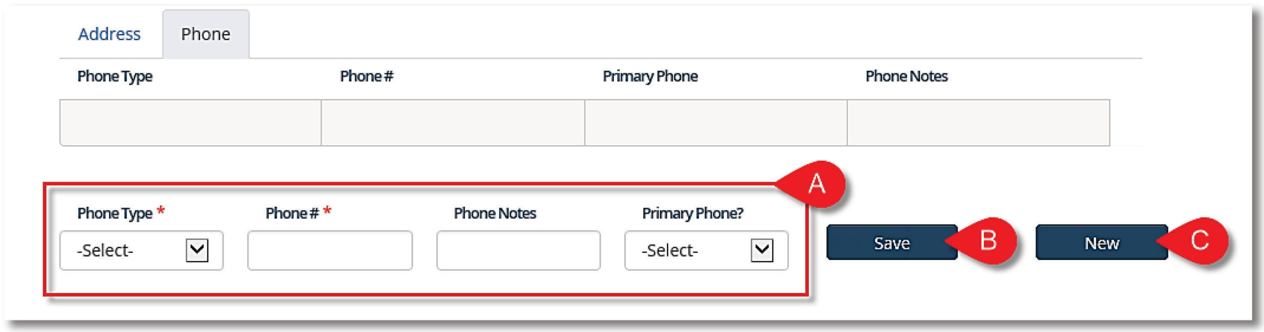
a. To enter a new address:
   i. Select whether or not the address is the individual's *Primary Address, s*elect the *Address Type*, and enter all of the known address information.

b. Click **Validate Address**.

c. If the *Search Result* list includes the desired address, click on the correct address in the grid and Click **Select**.
   i. 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**.
   ii. 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.

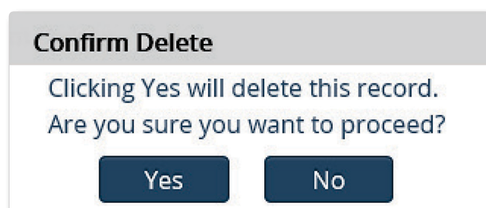
d. If an address has been added in error, click the Delete Icon **[🗑]** to the right of the address in the *Address* grid.
   i. A *Confirm Delete* pop-up will appear: Clicking **Yes** will delete the entry. Clicking **No** will cancel the action and the entry will not be deleted.

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



   a. 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.
   b. To edit an existing phone number, click on the *Phone Type* for the desired number in the grid.
   c. 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