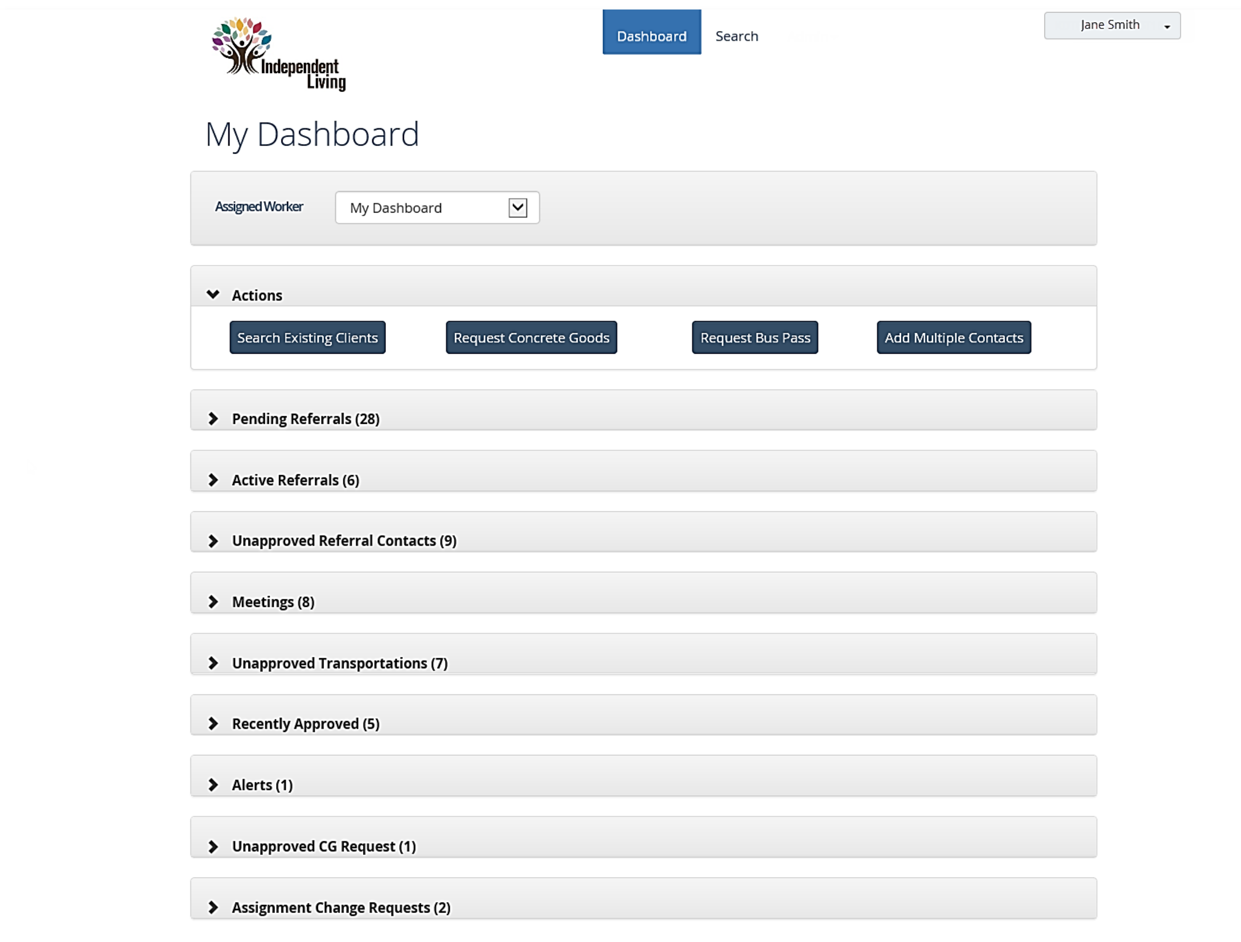
My Dashboard– Independent Living Job Aid

The *My Dashboard* screen is the first screen that appears after logging onto the Independent Living application. This screen allows workers to access their Referrals, view alerts, as well as recently approved or rejected requests for approval. Depending on their role, users can also search for existing clients, submit transportation or concrete goods requests, and add multiple contacts.

My Dashboard

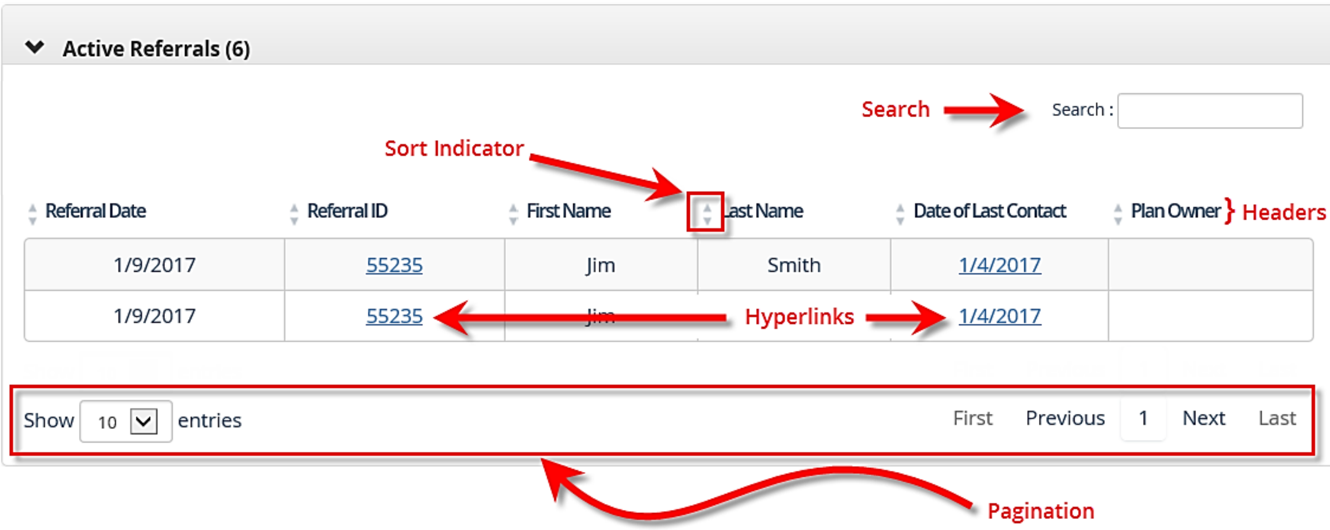


Accessing My Dashboard

1. The Dashboard button can be found at the top of every Independent Living screen.

   Clicking on the Dashboard button or the Independent Living logo [ ] at the top of any screen will also navigate the user to the Dashboard.

Basic Dashboard Elements



- **Headers:** Identify what type of information can be found in the grid columns.

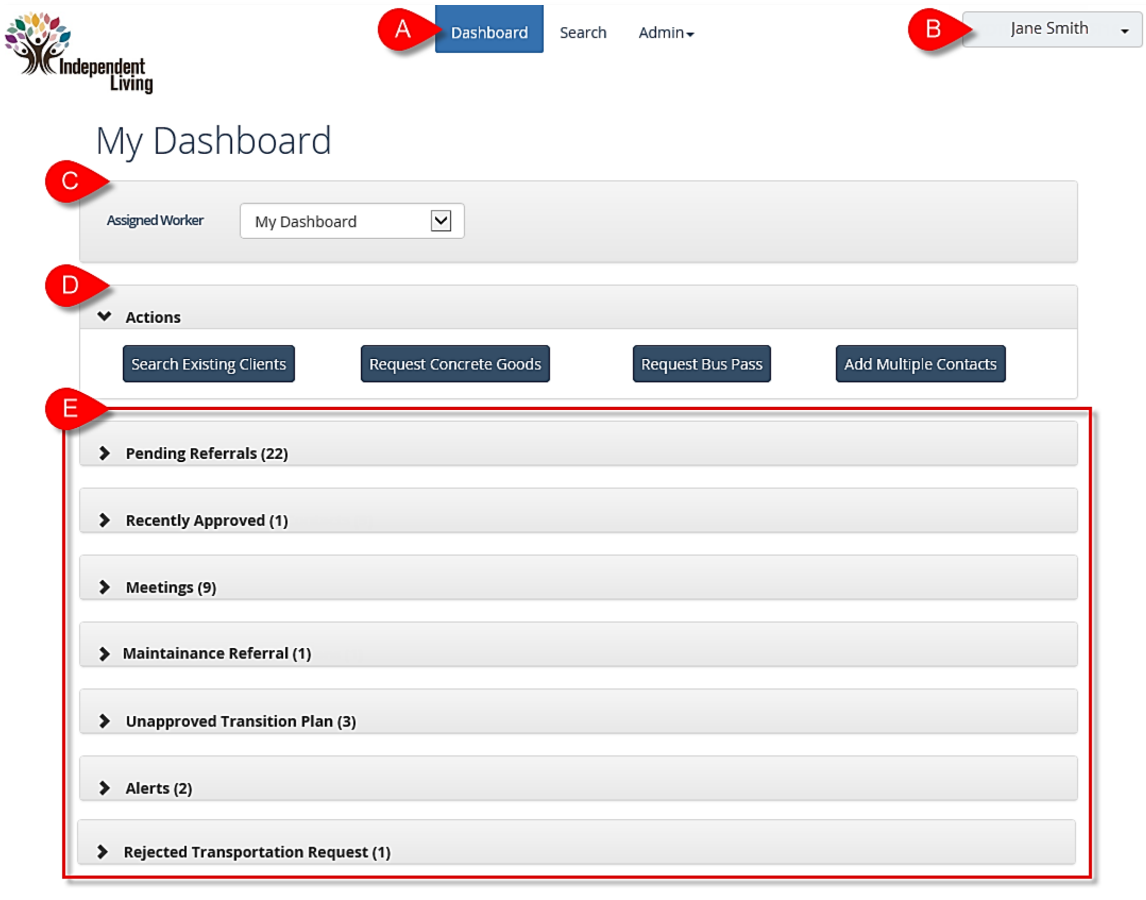
- **Sort Indicator:** [ ]This indicates what direction the Header in the grid is sorted in to. To sort the list on a specific Header, click on the desired *Header*. The sort indicator will point upward [ ] for ascending order or downward [ ] for descending order.

- **Hyperlinks:** Hyperlinks within the grid will open the item in the grid. Clicking on **55235** will open Referral# 55235. Clicking on **1/4/2017** will navigate to the 1/4/2017 Contact.

- **Pagination:** Longer lists will be separated into pages. These pages can be navigated by using the **First Previous 1234 Next Last** links to the bottom-right of the grid. To the bottom-left of the grid is a drop-down option, **Show 10 entries**, that allows users to change the number of grid entries displayed per page.

- **Search:** 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 "LINK" will filter the list to all Referrals with a source of *LINK*.
  - This search also accepts partial entries. For example, typing "10" will filter this list to include Referrals *1069*, *1029*, and *1025*. Typing "And" will bring up all Referrals assigned to *Andrew Troy* or Referred By *Andrew Troy*.
  - To clear the search results, click the **X** that appears to the right inside the search field or delete the search terms.

Basic Dashboard Elements

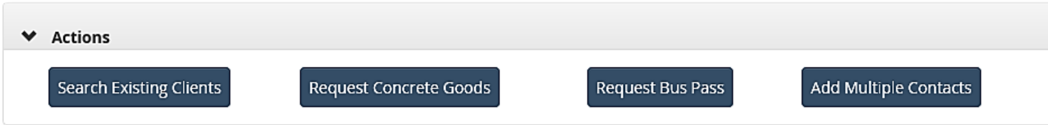


1. After selecting the Independent Living tile [ ] on the Synergy splash screen, the user will be taken directly to the Dashboard. All of the panes on this screen default to being closed. Use the chevrons [ ] to open and close the panes. The title of each pane also contains the number of items in that pane in parenthesis, for example: **Active Referrals (5)**.
   a. *Static Navigation Buttons*: These navigation buttons will always be at the top of the screen and can be accessed from any screen in Synergy. Depending on the User's level of access there may be more or less options available. All users will have *Dashboard* and *Search*.

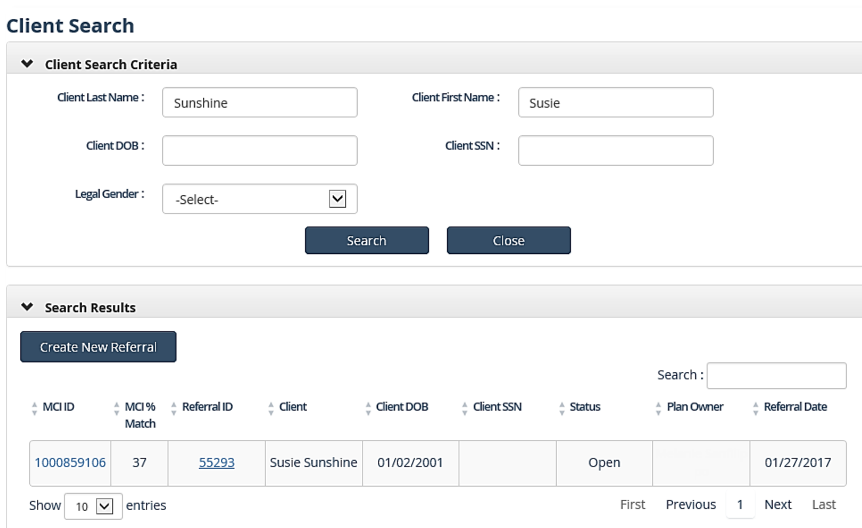
   b. *User Menu*: The name of the logged in user will be displayed. Clicking on the drop-down will give the user the options to log out or navigate back to the Synergy login splash screen.

   c. *Assigned Worker*: For all users, except Admin and Admin Support, this drop-down will be locked to "My Dashboard" and will only show items assigned to that user.
      i. Admin and Admin Support users can select other users from the *Assigned Worker* drop-down to view that user's Dashboard. Selecting "View All" from the drop-down will display information from all users' dashboards.

d. *Actions*: The *Actions* pane allows the user to: *Search Existing Clients*, *Request Concrete Goods, Request Bus Pass* (Transportation Assistance), or *Add Multiple Contacts*.



i. *Search Existing Clients*: This action is used to create a new Referral or re-open an existing Referral. The user must first search Synergy to see if the Youth has an existing Referral before a new Referral can be created.



1. Click **Search Existing Clients** to open the *Client Search* pop-up.

2. Enter all known information about the client in the *Client Search Criteria* and click **Search**.

3. Review the *Search Results* and determine if the Youth is one of the listed clients. Clicking on the *MCI ID* will open the individual's Client View information. Clicking on the *Referral ID* will navigate the user to that Referral.

4. If the Youth is not one of the listed options, the user can click **Create New Referral** to start a new Referral. Note: If one of the listed options has an *MCI % Match* of 95 or above, the user will not be able to create a new Referral and will need to connect to the existing Referral with the 95% match.

5. Closed Referrals can be re-opened by clicking on Reopen at the bottom of the Youth Info screen. The Referral will need to be re-assigned as well.

6. To close the *Client Search* pop-up without creating a new Referral, click Close.

ii. Request Concrete Goods and Request Bus Pass will also open the *Client Search* pop-up. From there the user can search for the Youth.

1. Request Concrete Goods – *Search Results*: Clicking on the *Referral ID* will navigate the user to that Referral's Concrete Goods screen.

2. Request Bus Pass – *Search Results*: Clicking on the *Referral ID* will navigate the user to that Referral's Transportation screen.

iii. Add Multiple Contacts: This action button allows the user to document one contact for multiple youth. See the **Add Multiple Contacts – IL Job Aid** for details.

e. There may be several panes listed below the *Actions* pane, depending on the user's workload. If a particular pane does not have any entries for that user, that pane will not be visible on the dashboard. For example, if none of the user's Transportation Requests have been rejected, the *Rejected Transportation Request* pane will not be visible.

i. *Active Referrals*: Users who have Referrals assigned will have an *Active Referrals* pane listing all their active Youth.

ii. *Maintenance Referrals*: This pane contains a list of the user's assigned Youth who have not been contacted in 90+ days. When a new contact is entered on a Maintenance Referral that Referral will move up to the *Active Referrals* pane.

iii. *Meetings*: Users who have been invited to an upcoming meeting (Transition Plan or other) will have those upcoming meetings listed here. Note: Transition Plan Owners (Facilitators) must invite themselves in the Meetings screen in order to have the upcoming Transition Plan appear in their *Meetings* pane.

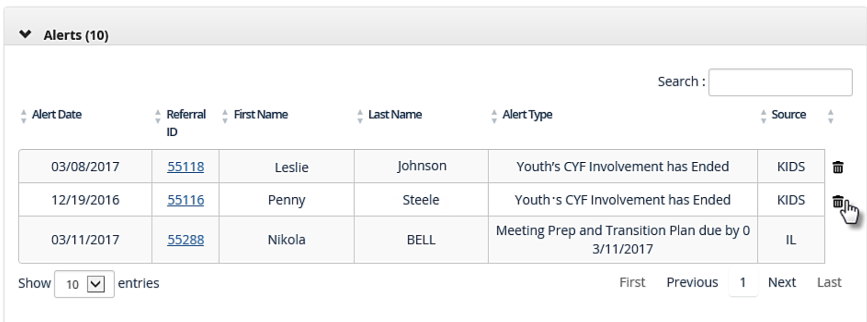
iv. *Rejected…* panes: If a supervisor has rejected a Transition Plan, Referral Contact, Concrete Goods (CG) Request, Transportation Request, or Assignment Change that rejected item will appear in a *Rejected* pane. Users can then click on the rejected item to review, edit, and resubmit for approval.

v. *Recently Approved*: Any recently approved Transition Plan completed by the user will appear in this pane.

vi. *Unapproved…* panes: Supervisors and Admins will have Unapproved panes for any Transition Plan, Referral Contact, Concrete Goods (CG) Request, Transportation Request, or Assignment Change that has been sent to them.

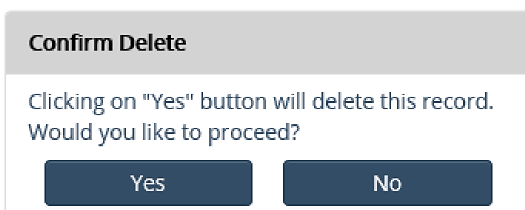
vii. *Pending Referrals* and *412 Youth Zone Pending Referrals*: Admins will have either Pending Referrals or 412 Youth Zone Pending Referrals panes if there are any pending Referrals for the Admin to review and assign.

viii. *Alerts*: This pane contains reminders about Transition Plans that are due as well as alerts when CYF opens or closes involvement with a Youth.



Alert Date	Referral ID	First Name	Last Name	Alert Type	Source
03/08/2017	55118	Leslie	Johnson	Youth's CYF Involvement has Ended	KIDS
12/19/2016	55116	Penny	Steele	Youth's CYF Involvement has Ended	KIDS
03/11/2017	55288	Nikola	BELL	Meeting Prep and Transition Plan due by 0 3/11/2017	IL

1. The user can delete the CYF involvement alerts by clicking the Delete Icon [ ] to the right of the Alert in the *Alerts* grid. A *Confirm Delete* pop-up will appear:



Clicking **Yes** will delete the Alert.

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

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 I-Service, go to: https://servicedesk.alleghenycounty.us

This and other Job Aids can be found at: http://s3.amazonaws.com/dhs-application-support/index.htm