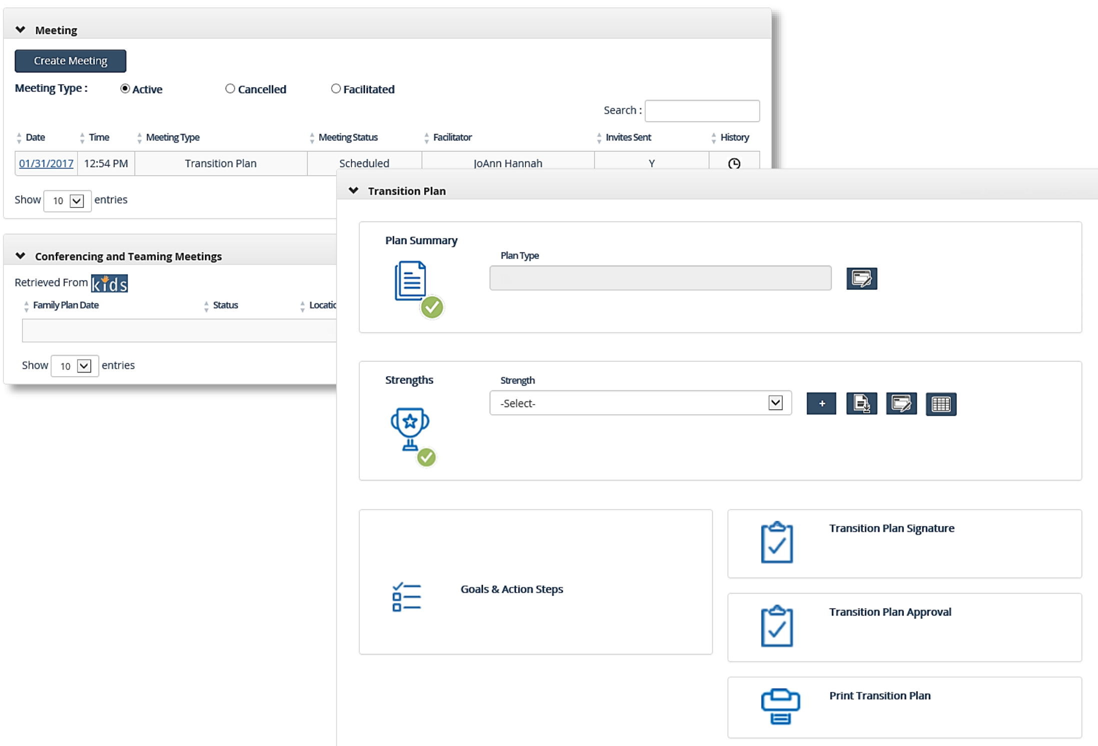
Meetings & Transition Plan – IL Job Aid

The *Meetings* screen allows the user to document the invitations, attendance and Thank You letters for meetings including Transition Plans. The Meeting must be scheduled and documented on the *Meetings* screen before a Transition Plan can be created. After a Transition Plan has been created it can be accessed through the *Transition Plan* screen.

Meetings & the Transition Plan

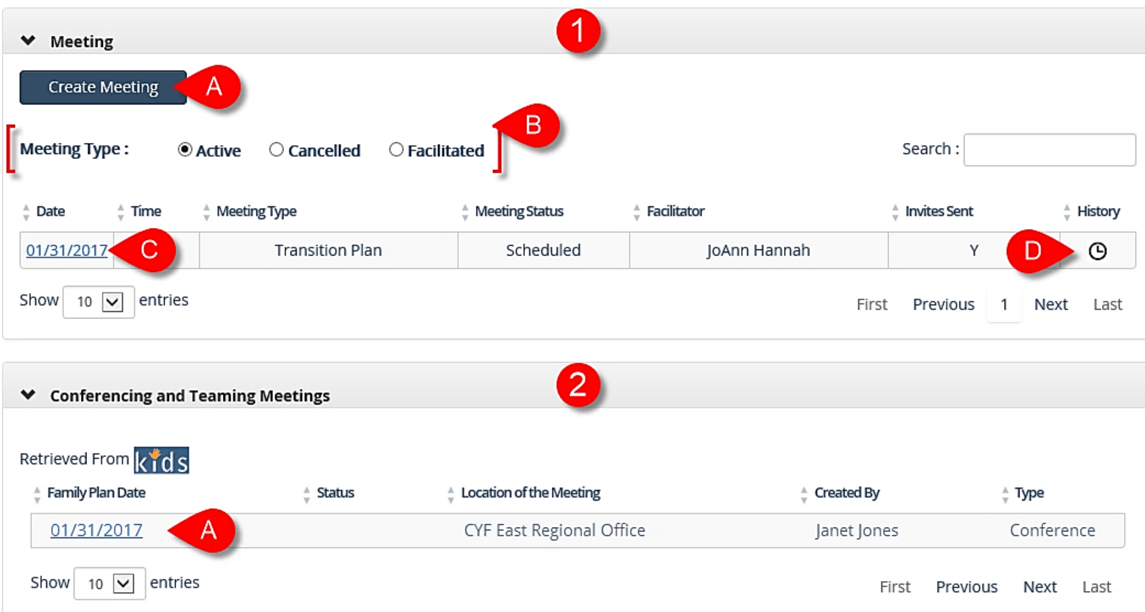


In this Job Aid:

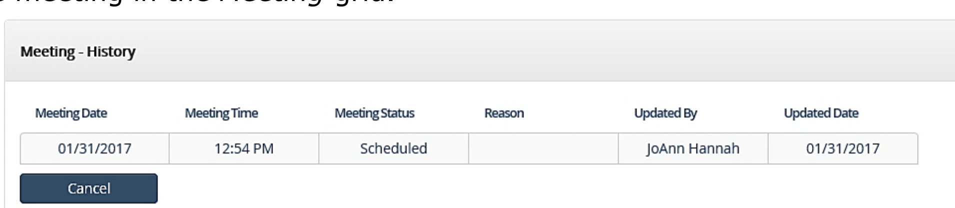
Meetings – Navigation

1. From the **Dashboard**: Locate the desired Referral and click on the *Referral ID* to bring the Referral into focus.
   a. Click on the **Meetings** tile.

Meetings – list screen

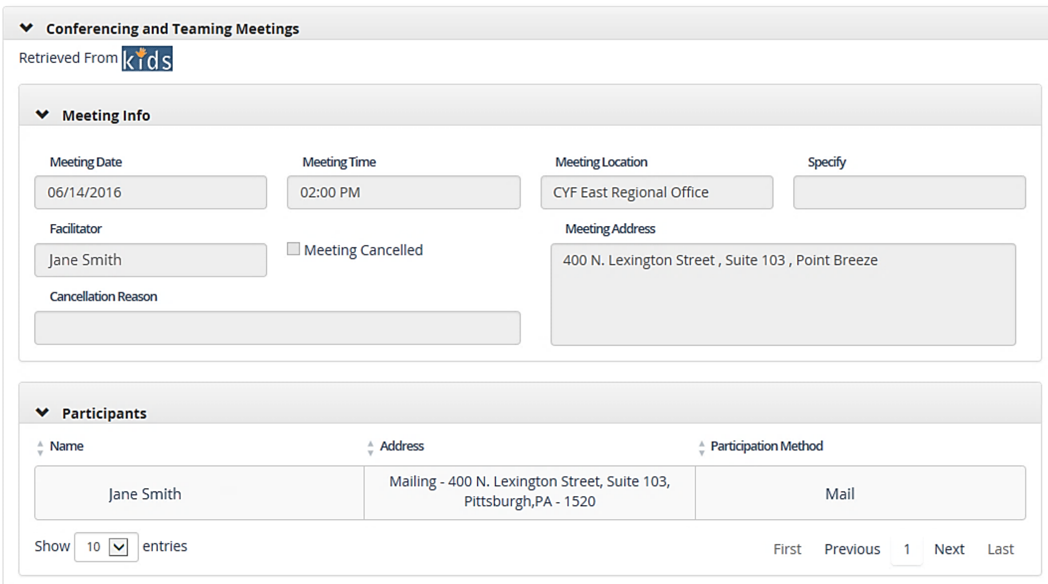


1. **Meeting**: This pane contains a list of the meetings created in this Referral.
   a. Click **Create Meeting** to create a new meeting.
   b. The *Meeting* grid can be filtered to *Active*, *Cancelled* or *Facilitated* meetings only using the *Meeting Type* Radio buttons.
   c. To view a meeting that has already been created, click on the *Date* of the desired meeting in the grid.
   d. To view the scheduling History of a meeting, click on the History Icon [ ] to the right of the meeting in the *Meeting* grid.



Click **Cancel** to close the *Meeting – History* pop-up.

2. **Conferencing and Teaming Meetings**: If the Client is CYF active this pane will display a list of the Conferences and Teamings that have occurred or are scheduled to occur.
   a. To view *Meeting Info* and a list of *Participants* click the *Date* of the desired meeting in the grid.
   b. Two new sub-panes will appear inside the **Conferencing and Teaming Meetings** pane:
   Meeting Info will display the meeting date, time, location and facilitator for the CYF Conferencing and Teaming Meeting.
   Participants will display all the individuals who were invited to the CYF Conferencing and Teaming Meeting as well as their address and method of participation.



   c. To refresh the *Meetings* screen, click on the **Meetings** tile.

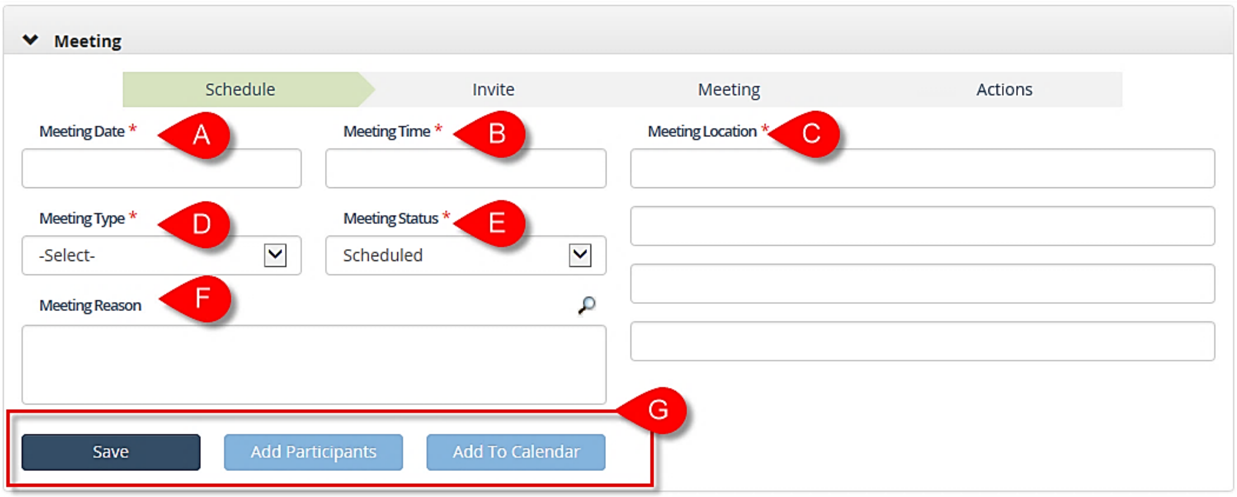
> ***NOTE:*** *Only one Transition Plan can be active at a time; the last Transition Plan must be approved or saved as final before the next Transition Plan can be documented.*

Meetings – Navigation Bar

The Meetings Navigation Bar will show the user which sections have been completed for the meeting. The Navigation Bar can be used to navigate between sections.

Meetings – Schedule section

1. Click **Create Meeting** to create a new meeting and complete the *Schedule* section.



   a. *Meeting Date*: Enter the date of the meeting (Past dates cannot be entered).

   b. *Meeting Time*: Enter the time of the meeting (Past times cannot be entered).

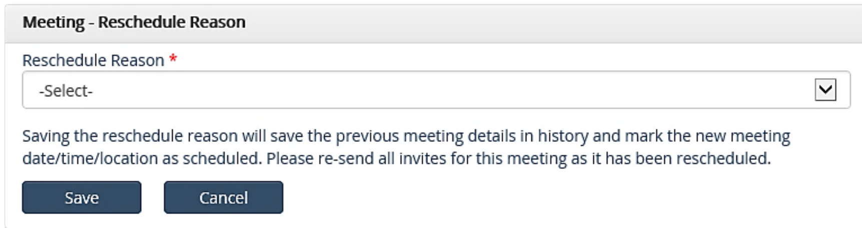
   c. *Meeting Location*: Enter the name and address of the meeting location in the 4 address lines.

   d. *Meeting Type*: Select the type of meeting from the drop-down.

IMPORTANT NOTE: *If the Meeting Type of "Transition Plan" is not selected the user will* ***NOT*** *be able to create a new Transition Plan.*

e. *Meeting Status*: Select the status of the meeting from the drop-down.

  i. If a meeting is rescheduled the Meeting – *Reschedule Reason* pop-up will open when the meeting is saved.



  Select the reason for rescheduling from the *Reschedule Reason* drop-down and click **Save**.

  To close the pop-up without saving the selection, click **Cancel**.

  ii. If a meeting is cancelled the *Meeting – Cancel Reason* pop-up will open when the meeting is saved.

  Select the reason for cancellation from the *Cancel Reason* drop-down and click **Save**.

  To close the pop-up without saving the selection, click **Cancel**.

f. *Meeting Reason*: Enter the reason why the meeting is being held.

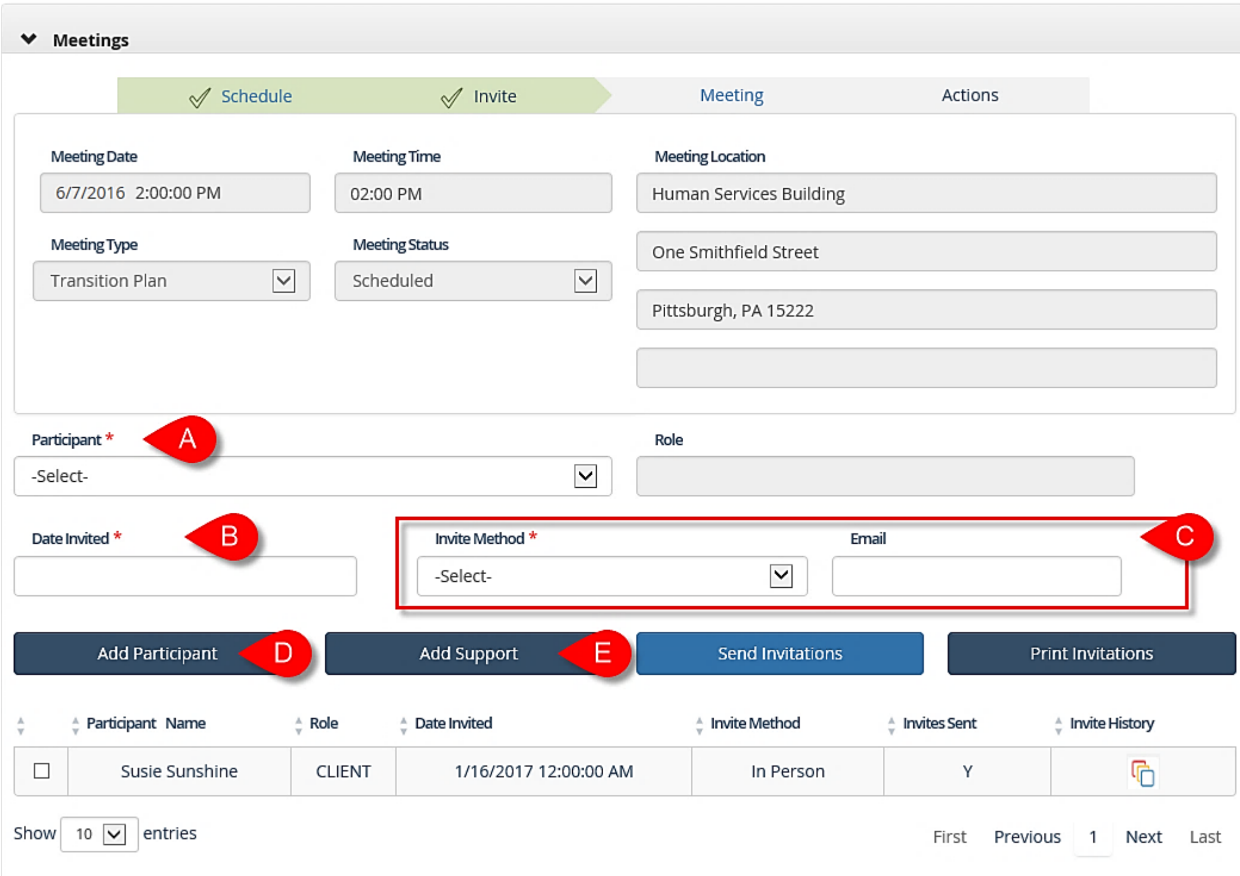
g. Click **Save** to save the entered information and enable the other buttons.

  To generate an Outlook Calendar appointment for the meeting click **Add to Calendar**.

  To move on to the *Invite* section click **Add Participants**.

Meetings – Invite section

1. Adding Participants:



a. *Participant*: Select the person to be invited from the *Participant* drop-down. The Youth and their Supports will be at the top of the list. All Transition Planners, Educational Liaisons, and 412 Youth Zone staff will also automatically be listed in the drop-down so that the Plan Owner can invite the other IL staff assigned to the Youth.
The *Role* will automatically populate based on the information entered for that individual in the Referral.

> ***TIP:*** *When inviting participants, the user should also invite themselves, otherwise the upcoming meeting will not be displayed on the user's Dashboard*

b. *Date Invited*: Enter the date the participant was invited to the Meeting.

c. *Invite Method*: Select how the participant was invited. If "EMAIL" is chosen, the individual's email must be entered. If "MAIL" is chosen, the individual's address can be selected from the *Address* drop-down.

d. Click **Add Participant** to include the participant in the grid.

e. If an individual is not listed in the drop-down, click **Add Support** to add a new Support.

*See **Page 27** of this Job Aid for instructions on how to add a new Support.*

2. Once all the participants have been added, select all of the participants who are to receive an invite by checking the checkbox next to the name of each of the desired participants in the grid.

Add Participant | Add Support | Send Invitations | Print Invitations

	Participant Name	Role	Date Invited	Invite Method	Invites Sent	Invite History
☑	Susie Sunshine	CLIENT	1/16/2017 12:00:00 AM	In Person	Y	

a. Click **Send Invitations**. All Invitees with an *Invite Method* of EMAIL will receive an email invite.

b. Click **Print Invitations** To print the invitation letters. A printable PDF of the invites will be generated. Note: The PDF will contain all of the letters and will open in a separate window or browser tab.

c. Participants can be sent invites multiple times. If a participant has been invited more than once the *Invite History* can be viewed by clicking on the Additional Details Icon [ ] to view the *Invitation History* pop-up.

Invitation History for Susie Sunshine

Participant Name	Role	Date Invited	Invite Method	Invites Sent
Susie Sunshine	CLIENT	1/16/2017 12:00:00 AM	In Person	Y
Susie Sunshine	CLIENT	1/16/2017 12:00:00 AM	In Person	Y

Show 10 entries First Previous 1 Next Last

Close

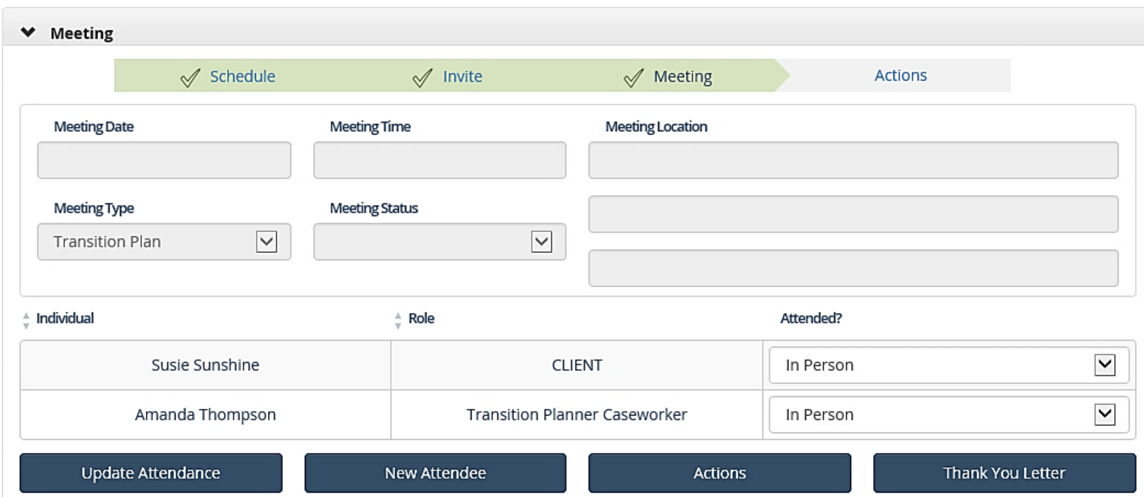
Click **Close** to close the *Invitation History* pop-up.

Meetings – Meeting section

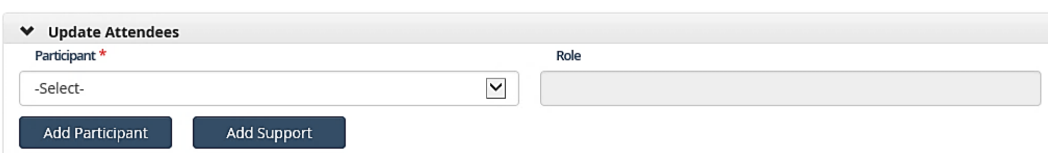
1. To navigate to the Meeting section, click on *Meeting* in the Navigation Bar:

2. If this meeting is a Transition Plan, click **Actions** to start the Transition Plan.

3. After the meeting or Transition Plan has occurred, the user must return to the **Meetings** screen to document attendance and print out Thank You letters.



a. Select the method of attendance for each Individual from the *Attended?* drop-downs and click **Update Attendance**. If additional individuals attended, click **New Attendee**.



i. Select the individual from the *Participant* drop-down and click **Add Participant**.

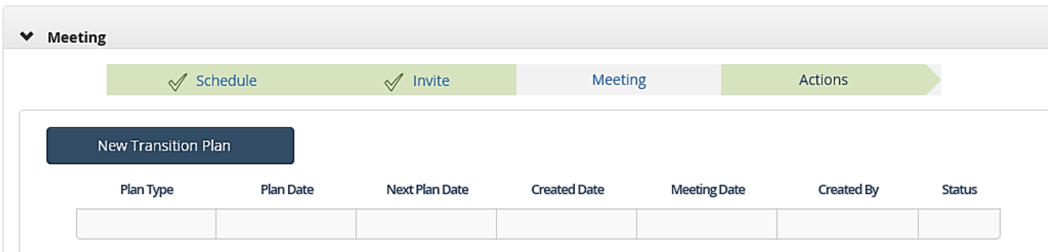
ii. If the individual is not in the drop-down, click **Add Support** to create a new Support. That individual will then appear in the drop-down for selection. **See page 27 for instructions on adding a new Support.**

iii. After the individual has been added, select the method of attendance from the *Attended?* drop-down and click **Update Attendance**.

b. Click **Thank You Letter**, a printable PDF of the Thank You letters will be generated. Note: The PDF will contain all of the letters and will open in a separate window or browser tab.

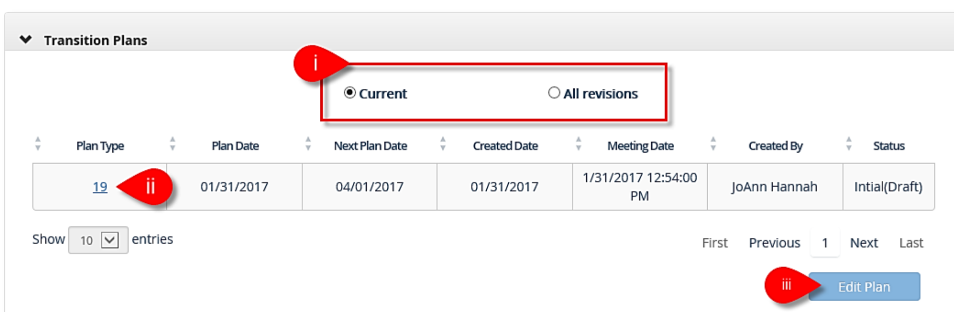
Transition Plan – Navigation

1. Creating a new Transition Plan:
    a. From the **Dashboard**: Locate the desired Referral and click on the *Referral ID* to bring the Referral into focus.
    b. Click on the **Meetings** tile.
    c. Document a new meeting: On the Meetings section of the Navigation Bar, click **Actions**
    d. From the *Actions* section click **New Transition Plan** to start the Transition Plan.



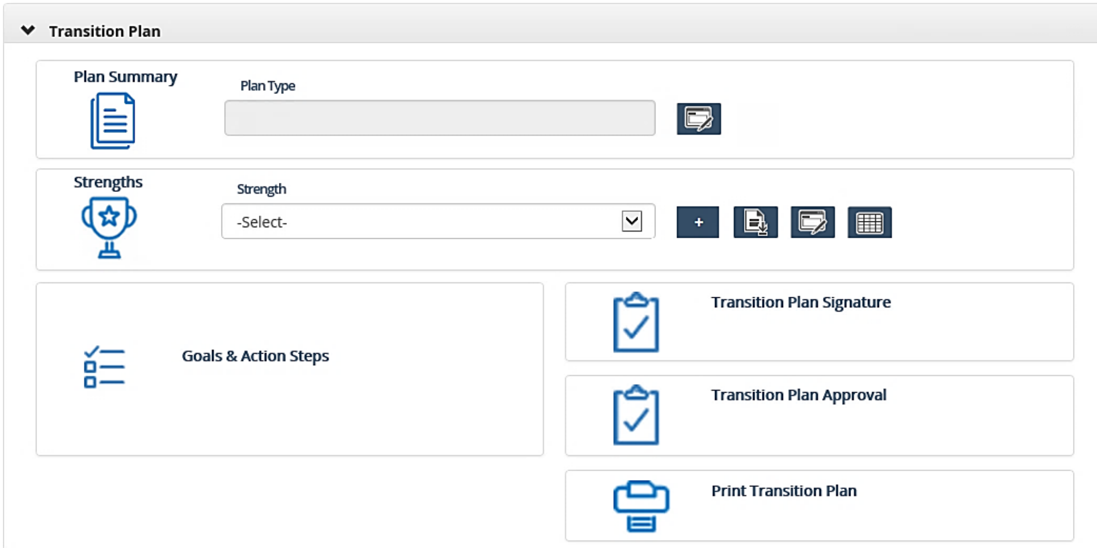
The **New Transition Plan** button may be light-blue and unavailable if the *Meeting Type* of "Transition Plan" was not selected and/or if the last Transition Plan was not Approved/Saved as Final.

2. Accessing a Transition Plan that has already been started or approved:
    a. From the **Dashboard**: Locate the desired Referral and click on the *Referral ID* to bring the Referral into focus.
    b. Click on the **Transition Plan** tile.
    c. **Transition Plans**:



        i. Use the ◯ *Current* and ◯ *All revisions* radio buttons to view the current Transition Plan or prior Plans.
        ii. To view a Plan, click on the *Plan Type* hyperlink in the desired Plan's line in the *Transition Plans* grid.
        iii. To edit a Plan, click **Edit Plan**.

Transition Plan – Overview



1. Buttons and drop-downs on the *Transition Plan* screen:
   a. *Edit* : Clicking on this button allows the user to edit information in that section.
   b. *Import* : Clicking on this button allows the user to import Strengths from recent CANS, FAST, or ANSA assessments for the Youth into the Plan.
   c. *Add* : Clicking on this button allows the user to add a manually Strength to the Plan.
   d. *View* : Clicking on this button allows the user to view a list of the Strengths that have already been added to the Plan.

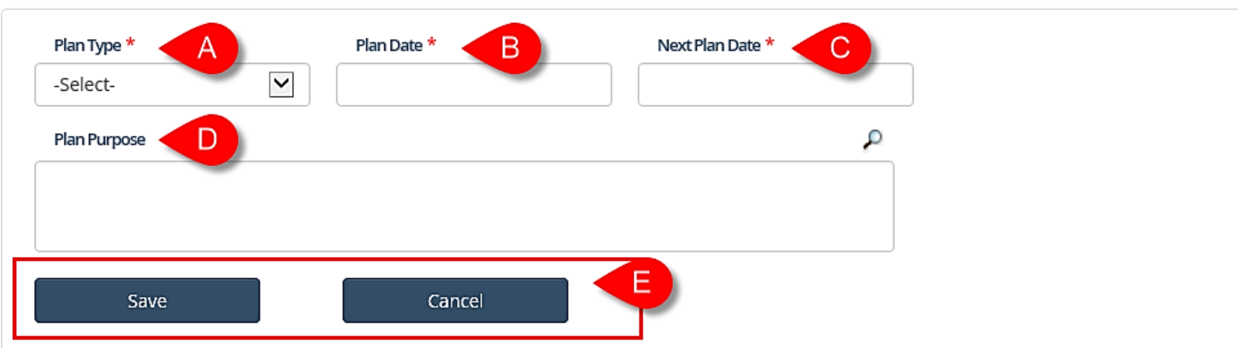
2. Requirements by section:
   a. *Plan Summary*: This section must be completed and saved before the user can move on to the next screen. A green checkmark will appear in this section when it is completed.
   b. *Strengths*: At least one Strength must be documented on the Plan. A green checkmark will appear in this section when at least one Strength has been documented.
   c. *Goals & Action Steps*: There must be at least one Outcome/Goal and one Action Step documented on the Plan. A green checkmark will appear in this section when at least one Outcome/Goal has been documented.
   d. *Signatures*: Signatures and/or attempts to obtain signatures must be documented for all attendees.
   e. *Plan Acceptance*: To Finalize a Plan the requirements for *Plan Summary, Strengths, Goals & Action Steps,* and *Signatures* must be met first. If any requirements have been missed that information will appear in red text when the user attempts to Finalize the Plan.

Transition Plan – Plan Summary

1. *Plan Summary*: This section must be completed and saved before the user can move on to the next section.

   a. Click the *Edit* button [ ] to open the *Plan Summary* pop-up.

2. *Plan Summary* pop-up:



   a. *Plan Type*: Select the type of Plan based on the age of the Youth from the drop-down.

   b. *Plan Date*: Enter the date of the Plan here.

   c. *Next Plan Date*: This field will automatically default to 2 months after the Plan Date but can be changed.

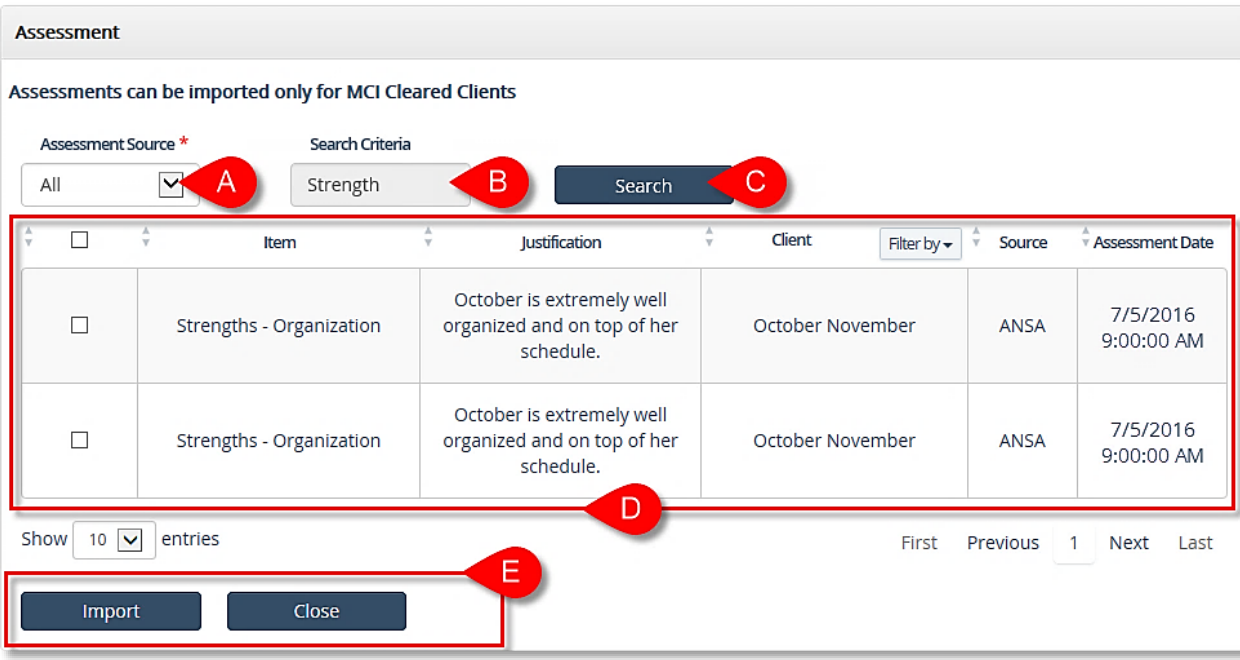
   d. *Plan Purpose*: If applicable, enter a short description of the Plan's purpose. Note that the *Plan Purpose* will print on the front page of the Plan.

   e. Click **Save** to save the information entered or edited and close the pop-up. Clicking **Cancel** will close the pop-up without saving any of the information that was entered or edited.

Transition Plan – Strengths

1. *Strengths*: At least one Strength must be documented on the Plan.

2. Importing Strengths: Click the *Import* button [ ] to open the *Assessment* pop-up:



a. *Assessment Source*: This drop-down defaults to "All" but a specific Assessment type can be selected from the drop-down instead.

b. *Search Criteria*: This field defaults to "Strength" and is not editable.

c. Click **Search** to search for documented Strengths using the criteria selected.

d. The *Search Results* grid will include Strengths from Assessments that have been completed within the last 8 months.

   i. To select a Strength for import, check the checkbox to the left of the desired Strength in the *Search Results* grid. To select all the Strengths for import, check the checkbox above the first column in the *Search Results* grid.

e. Click **Import** to import the selected Strength(s). Clicking **Close** will close the *Assessment* pop-up without importing any of the Strengths.

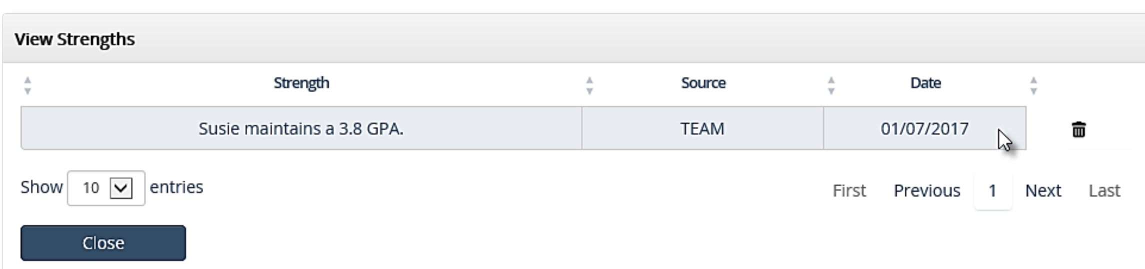
3. Adding a new Strength: Click the Add button [ ] to open a new *Strength* pop-up:

   a. *Strength*: Document the Strength in this textbox.
   b. Click [Save Strength] to save the Strength and close the pop-up.
   c. Clicking [Close] will close the pop-up without saving the information entered or edited.

4. Editing a Strength:

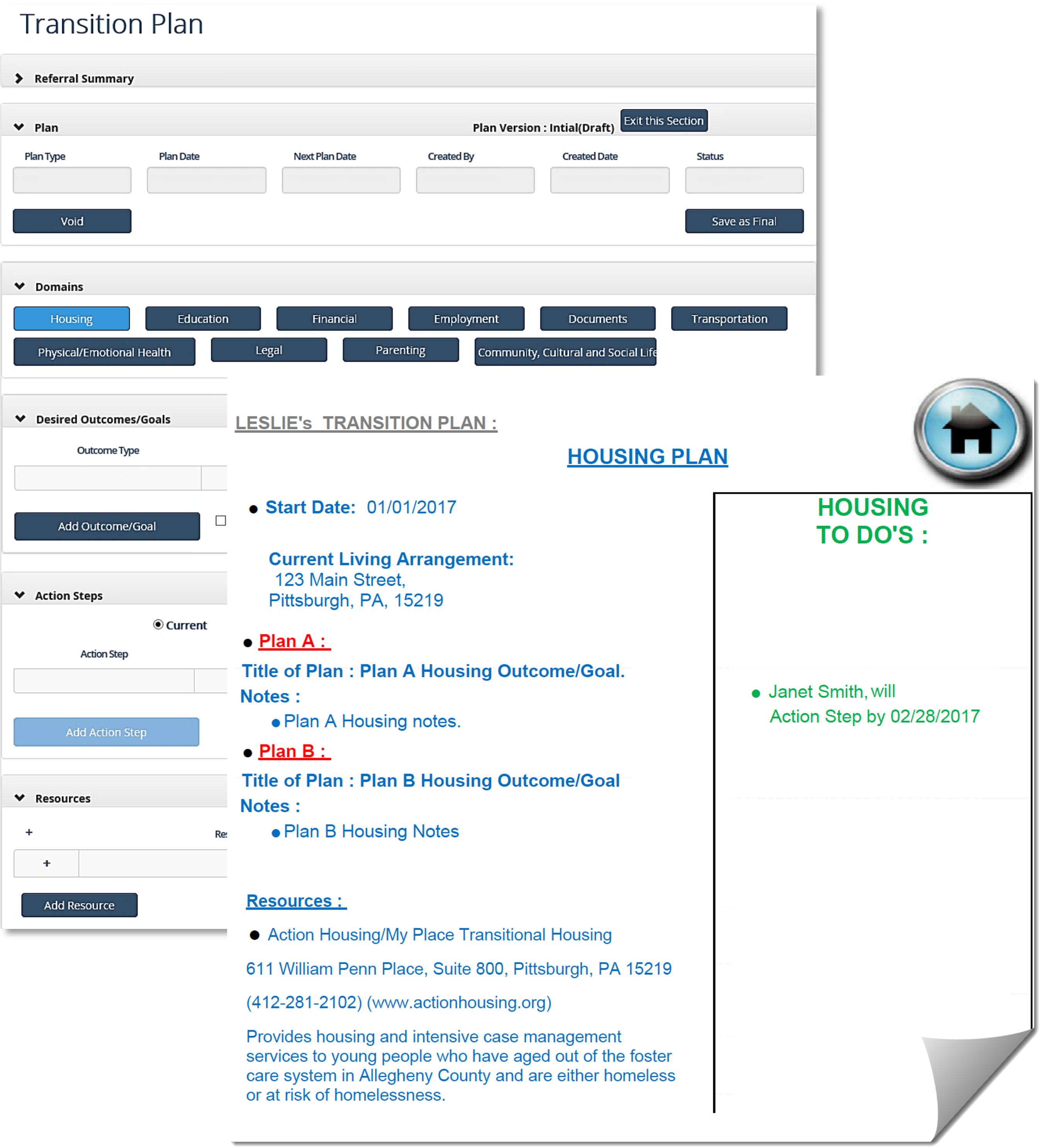
   a. *Strength*: Select the Strength to edit from this drop down.
   b. Click the *Edit* button [ ] to open the *Strength* pop-up for editing.
      i. Click [Save Strength] to save the Strength and close the pop-up.
      ii. Clicking [Close] will close the pop-up without saving the information entered or edited.

5. Viewing the Strengths list: Click the *View* button [ ] to open the *View Strengths* pop-up.



   a. To delete a Strength, move the mouse over that Strength's line in the grid. Click on the Delete Icon [ ] that appears to the right of the grid.
      i. A *Delete Confirmation* pop-up will appear: Clicking [Yes] will delete the *Strength*. Clicking [No] will cancel the action and the *Strength* will not be deleted.

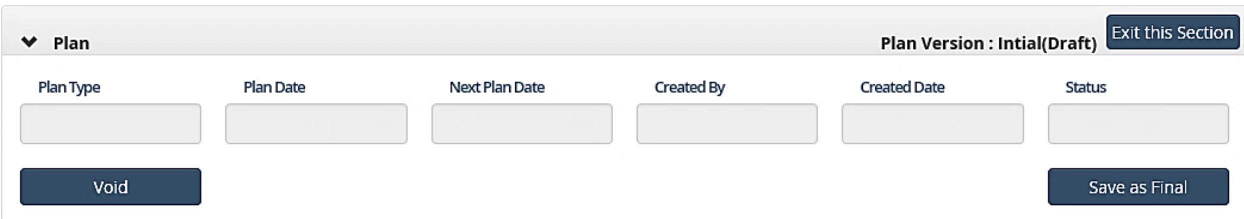
Transition Plan



Transition Plan – Goals & Action Steps

1. Click **Goals & Action Steps** to continue on to add Goals and Action Steps to the Plan.

2. **Plan**: This pane contains basic information on the Plan including the *Plan Type, Plan Date, Next Plan Date*, what user the Plan was *Created By*, *Created Date*, and the approval *Status* of the Plan.



a. Clicking **Exit this Section** will return the user to the main *Transition Plan* navigation screen.

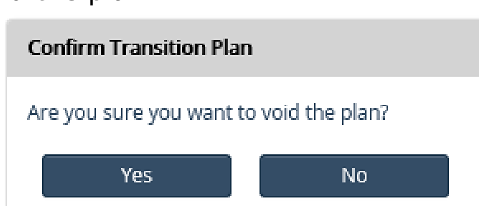
b. Clicking **Save as Final** - this Plan will be locked down against editing.

   i. CYF active Youth: The Plan will be sent for approval to the OCYF Supervisor of the Youth's CYF case.

   ii. Non CYF active Youth: The Plan will be finalized unless the user's Manager is requiring that user's Plans to be sent for approval. In that instance, the Plan will be sent to the user's Supervisor for approval.

> ***NOTE:** If an approval is required, the Transition Plan is not completely finalized until that approval has been completed.*

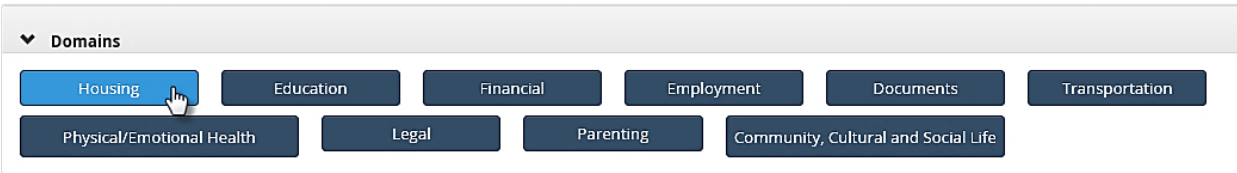
c. Void: A user can void a Plan before it has been saved as final. Information from voided Plans will not carry over to the next Plan. Clicking **Void** will open a confirmation pop-up: "Are you sure you want to void the plan?"



Clicking **Yes** will void the Plan. Clicking **No** will cancel the action and the Plan will not be voided.

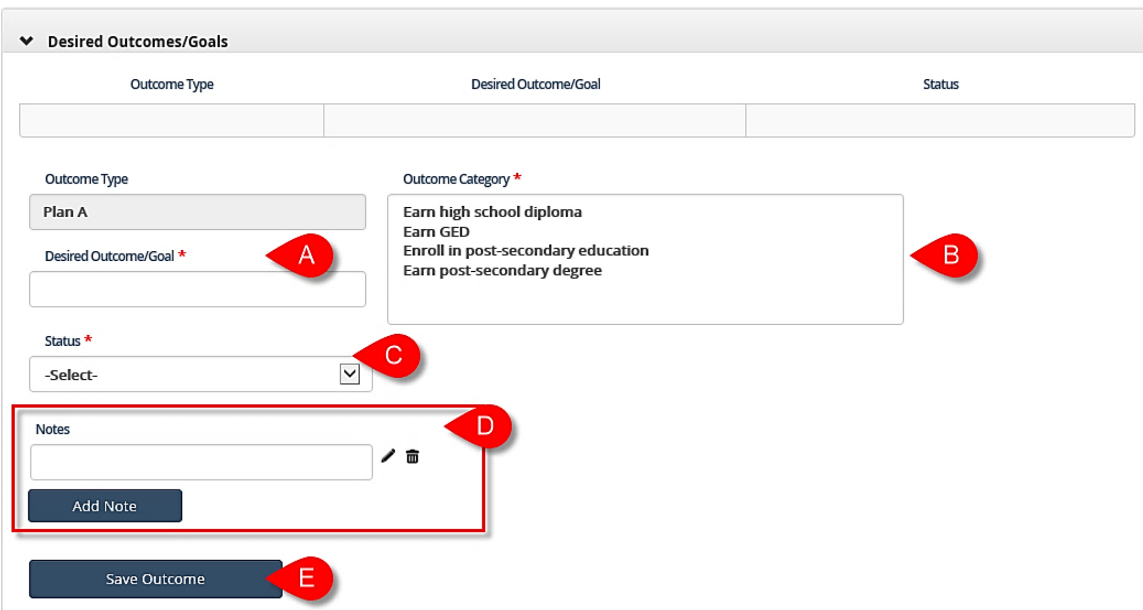
Transition Plan – Desired Outcomes/Goals

1. Select a Domain from the **Domains** pane.



2. Click **Add Outcome/Goal** to document an Outcome/Goal.
   a. If any of the Domains do not apply to this specific Transition Plan, check the ☑ *Youth Elected Not to Discuss…* checkbox within the Domain(s) that do not apply.

3. Documenting the **Desired Outcomes/Goals** pane:



   a. *Desired Outcome/Goal*: Enter the *Outcome/Goal* here.

   b. *Outcome Category*: Select all the Categories that apply to this specific Outcome/Goal. These Outcome Categories will not be visible on the printed version of the Plan. To select more than one Category, hold down the **[Ctrl]** key while clicking on each of the applicable Categories.

   c. *Status*: Select the Status of the Outcome/Goal. "In Progress" and "On Hold" Outcomes/Goals will be visible on the printed version of the Plan.

d. *Notes*: Use the notes section to add information to the Outcome/Goal.

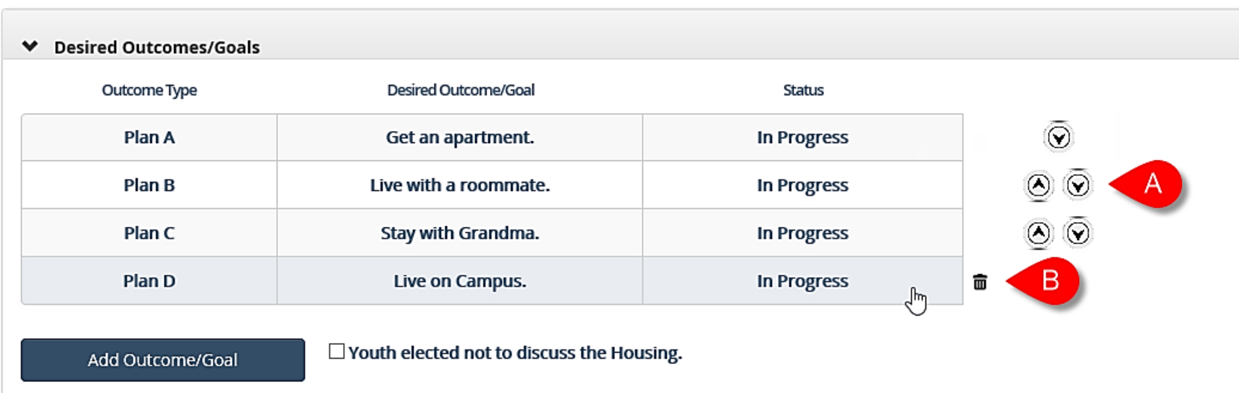
   i. To add additional Notes fields, click Add Note.

   ii. To delete a *Note*, click the Delete Icon [ ] to the right of the specific Note. A Confirm Delete pop-up will appear: Clicking Yes will delete the *Note*. Clicking No will cancel the action and the *Note* will not be deleted.

e. Click Save Outcome to add the Outcome to the *Desired Outcomes/Goals* grid.

> ***Tip:** To edit a Note after the Outcome has been saved, click the Edit Icon [ ] to the right of the desired Note.*

4. *Outcomes/Goals* grid: Changing the Outcome order and deleting Outcomes.



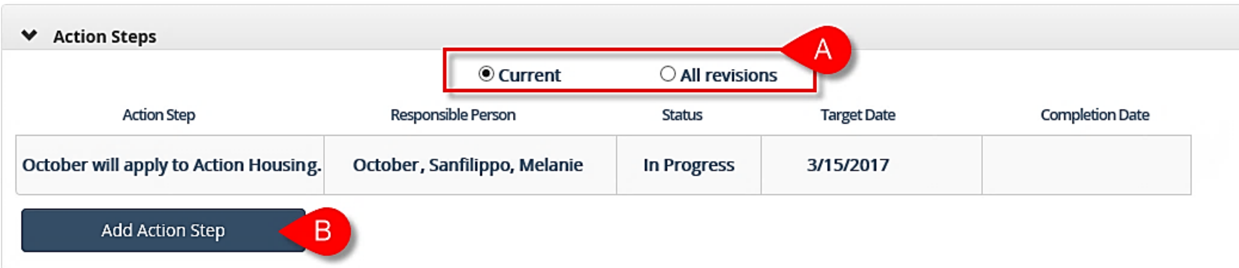
a. When there are multiple Outcomes/Goals, the Plan order can be re-arranged using the up/down arrows [ ] to the right of the grid.

b. To delete an Outcome, move the mouse over that Outcome's line in the grid. A Delete Icon [ ] will appear, click the Delete Icon [ ] to the right of the Outcome in the *Outcomes/Goals* grid.

   i. A *Delete Confirmation* pop-up will appear: Clicking Yes will delete the *Outcome*. Clicking No will cancel the action and the *Outcome* will not be deleted.

Transition Plan – Action Steps

1. *Action Steps* grid: Click on an Outcome/Goal in the *Desired Outcomes/Goals* grid to document Action Step(s) for that Outcome/Goal. This grid lists all the Action Steps connected to the selected Outcome/Goal.

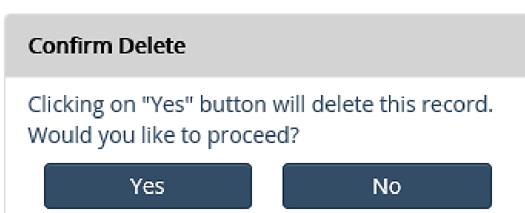


   a. Only Action steps with a *Status* of "In Progress" will be visible when the ◉ *Current* radio button is selected. To view all Action Steps regardless of the *Status*, select the ◉ *All revisions* radio button.

   b. Click on an Outcome/Goal in the *Desired Outcome/Goal* grid to document Action Step(s) for that Outcome/Goal. Once the Outcome/Goal is selected, click **Add Action Step** in the **Action Steps** sub-pane.

2. To delete an Action Step, move the mouse over that Action Step's line in the grid. A Delete Icon [🗑] will appear, click the Delete Icon [🗑] to the right of the Action Step in the grid.

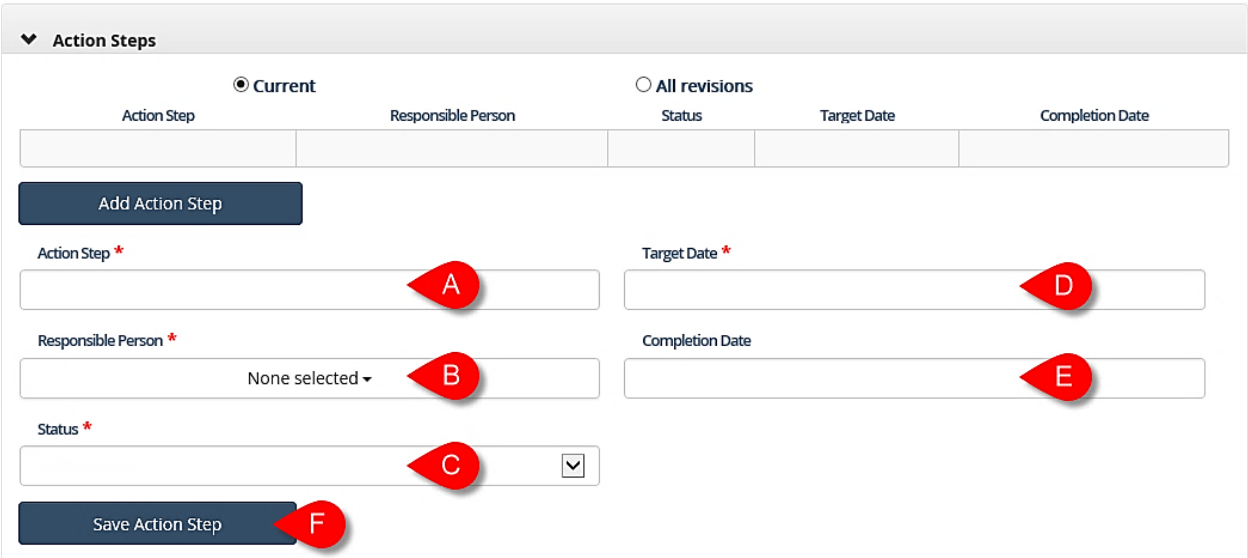
      i. A *Delete Confirmation* pop-up will appear:



      Clicking **Yes** will delete the *Action Step*.

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

3. Documenting an Action Step:



a. *Action Step*: Document the Action to be taken in this text box.

b. *Responsible Person*: Select the individual(s) responsible for completing this Action Step in the MultiSelect drop-down.

c. *Status*: Select the Status of this Action Step from the drop-down.

d. *Target Date*: Enter a Target Date for completion of this Action Step.

e. *Completion Date*: If this Action Step has been completed, enter the date of completion.

f. Click **Save Action Step** to save the information entered.

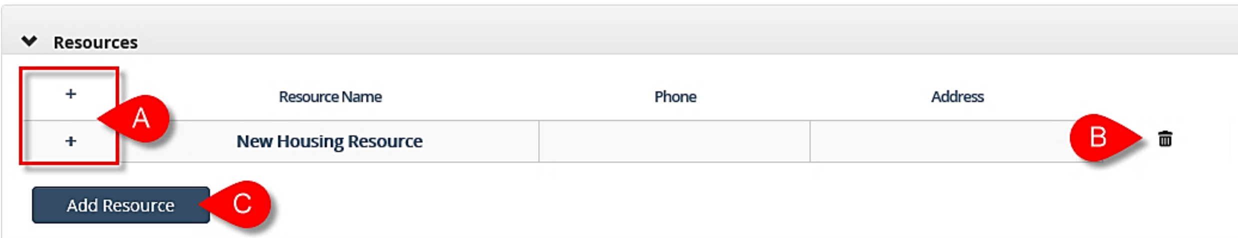
g. Click **Add Action Step** to document additional Action Steps for the selected Outcome/Goal.

TIP: *After the Transition Plan is completed, users can document progress on the Plan's Action Steps using the Progress section in* ***Contact Notes****.*

Transition Plan – Resources

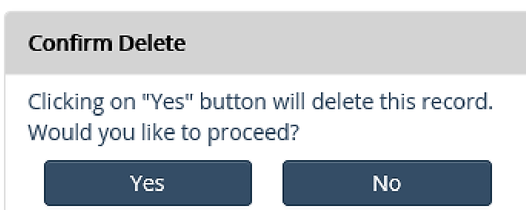
1. Resources: Resources can be added to each domain to provide information that will assist the Youth and others in achieving that domain's Outcomes/Goals. Resources can either be selected from the Resources list or, if the desired resource is not listed, the user can add in a new resource.

2. *Resources* grid: All the added resources can be viewed in the *Resources* grid.



   a. To view additional information on a specific resource click the [**+**] to the left of the resource in the grid. To view additional information for all of the listed resources at once, click the [**+**] above the grid.

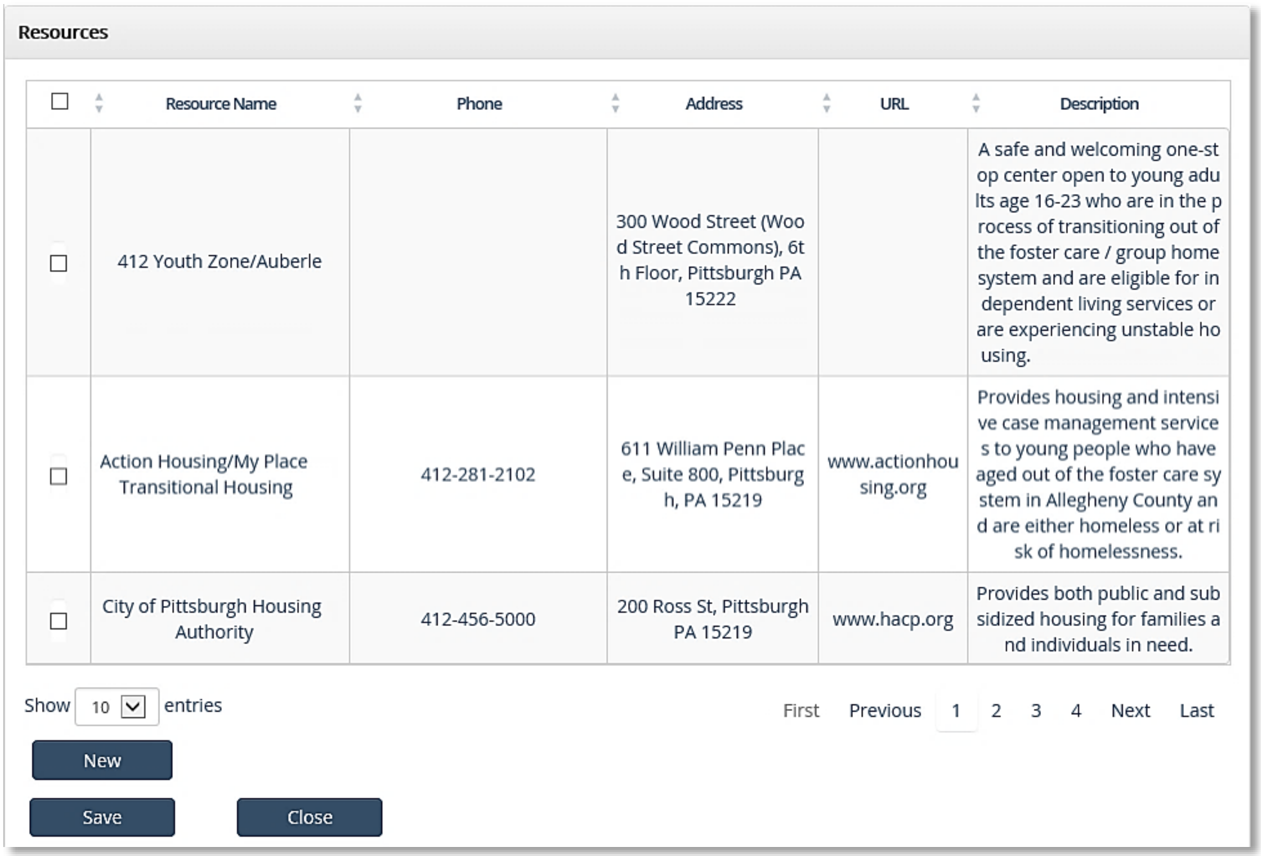
   b. To delete a Resource from the grid, click the Delete Icon [ ] to the right of the Resource in the *Resources* grid.
      i. A *Delete Confirmation* pop-up will appear:



Clicking **Yes** will delete the Resource.
Clicking **No** will cancel the action and the Resource will not be deleted.

   c. To add a Resource to the grid, click **Add Resource**.

3. Selecting Resources: Click **Add Resource** to open the *Resources* pop-up.



Resources

☐	Resource Name	Phone	Address	URL	Description
☐	412 Youth Zone/Auberle		300 Wood Street (Wood Street Commons), 6th Floor, Pittsburgh PA 15222		A safe and welcoming one-stop center open to young adults age 16-23 who are in the process of transitioning out of the foster care / group home system and are eligible for independent living services or are experiencing unstable housing.
☐	Action Housing/My Place Transitional Housing	412-281-2102	611 William Penn Place, Suite 800, Pittsburgh, PA 15219	www.actionhousing.org	Provides housing and intensive case management services to young people who have aged out of the foster care system in Allegheny County and are either homeless or at risk of homelessness.
☐	City of Pittsburgh Housing Authority	412-456-5000	200 Ross St, Pittsburgh PA 15219	www.hacp.org	Provides both public and subsidized housing for families and individuals in need.

Show 10 entries

First Previous 1 2 3 4 Next Last

New

Save Close

a. Using the checkboxes to the left side of the list select each desired resource.

b. To select all the resources, use the checkbox above the list.

c. Click **Save** to add the selected resources to the *Resources* grid.

Clicking **Close** will close the *Resources* pop-up without saving any of the selections.

4. Creating a new Resource that is not already listed: Click **Add Resource** to open the *Resources* pop-up.

   a. Click **New** to create a new Resource.

   b. *Resource Name*: Enter the name of the Resource.

   c. *Phone*: If known, enter the phone number of the Resource.

   d. *Address*: If known, enter the address of the Resource.

   e. *URL*: If known, enter the website of the Resource.

> ***NOTE:*** *Phone, Address, and URL are a set of half-mandatory fields. This means that to save the Resource, at least one of these 3 fields must be completed.*

   f. *Description*: If applicable, enter a short description of what the Resource offers.

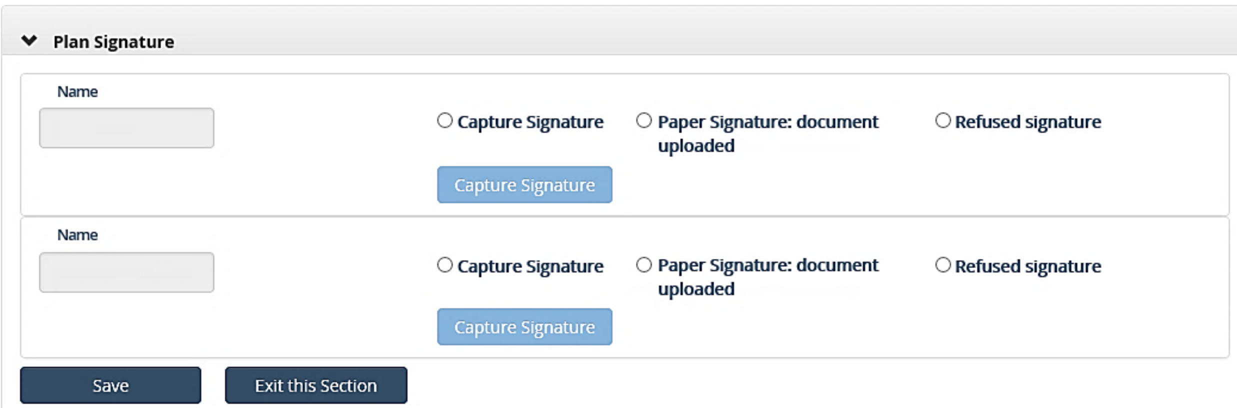
   g. Click **Save Resource** to add the new Resource to the *Resources* pop-up. When the Resource is added it will also automatically be checked for selection.

      i. Click **Save** to add the new selected Resource to the *Resources* grid.

Transition Plan – Signatures & Printing the Plan

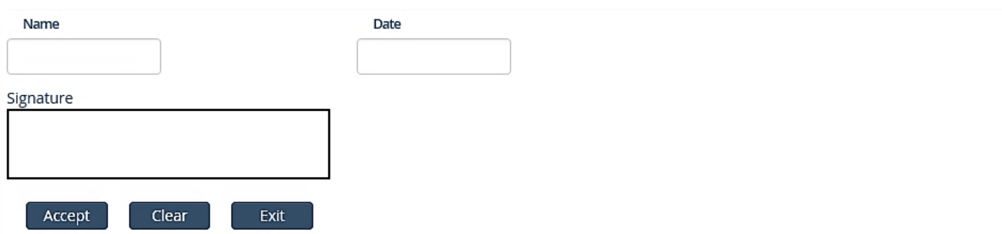
1. Once all the Domains have been addressed, either by adding outcomes or by checking the ☑ *Youth Elected Not to Discuss…* checkbox, click **Exit this Section** to return to the main Transition Plan page.

2. Click **Transition Plan Signature** to navigate to the *Plan Signature* page.



   a. For each individual, indicate how the signature was captured.

   b. To capture a digital signature, select the ◉ *Capture Signature* radio button and click **Capture Signature** to open the *Signature* pop-up.



      i. The individual can then sign within the *Signature* box. Note that a computer or tablet with a touch screen is required to capture a signature.

      ii. Click **Accept** to capture the signature.

      iii. If the individual would like to re-do their signature, click **Clear** to reset the *Signature* box for another signature attempt.

      iv. To close the *Signature* pop-up without saving the signature, click **Exit**.

c. If the individual refused to sign, select the ◉ *Refused Signature* radio button.

d. If the digital signature could not be captured and the individual signed the paper form:
   i. Select the ◉ *Paper Signature: document uploaded* radio button.

   ii. After completing the *Signature* section navigate to the **Document Folder** screen and upload the paper signatures to Synergy.

IMPORTANT NOTE: *Workers should **ALWAYS** attempt to gather signatures digitally first. The paper signatures sheet should only be used if a digital signature cannot be gathered due to technical (IT) reasons.*

e. Once all Signatures have been documented, click Save.

f. Click Exit this Section to return to the main Transition Plan page.

3. To print the Transition Plan, click Print Transition Plan. A printable PDF preview of the Transition Plan will open.

Important Reminder when previewing and printing:

Previews will open in a new window or tab. This window or tab may open in the background and may not be immediately visible. Close all other previews first.

Synergy is **NOT** compatible with Microsoft's Edge browser.

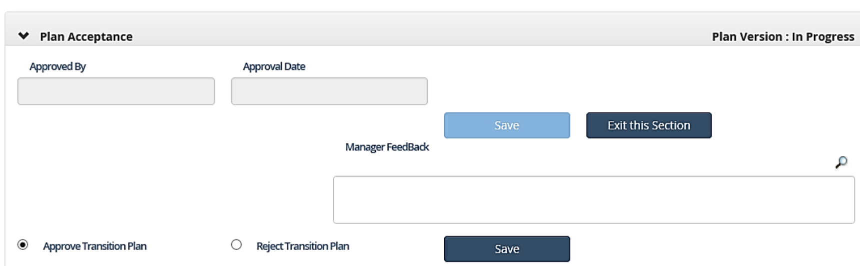
Use either Internet Explorer or Chrome browsers.

Transition Plan – Finalizing and Approving

1. Once the Transition Plan has been completed, signatures have been gathered, and all attendees have been documented, the Transition Plan must be finalized and (if applicable) approved.

2. From the main Transition Plan screen click **Goals & Action Steps** and then click **Save as Final** to lock the Transition Plan against further editing. If the Transition Plan does not require approval, this will be the last step in finalizing the Transition Plan.

3. If the Transition Plan requires approval from either CYF or IL Supervisors, clicking **Save as Final** will send the Transition Plan for approval.
    a. IL Supervisors will be taken to the main Transition Plan screen when clicking on Unapproved Transition Plans on the Dashboard.
        i. After reviewing the Transition Plan, the IL Supervisor will then click **Transition Plan Approval** to navigate to **Plan Acceptance**.



1. Supervisors will then select either the *Approve Transition Plan* or *Reject Transition Plan* radio buttons and click **Save**. If the Plan is rejected, the *Manager Feedback* narrative field must be completed before the **Save** button can be clicked.

2. Clicking **Exit this Section** will navigate back to the main Transition Plan screen.

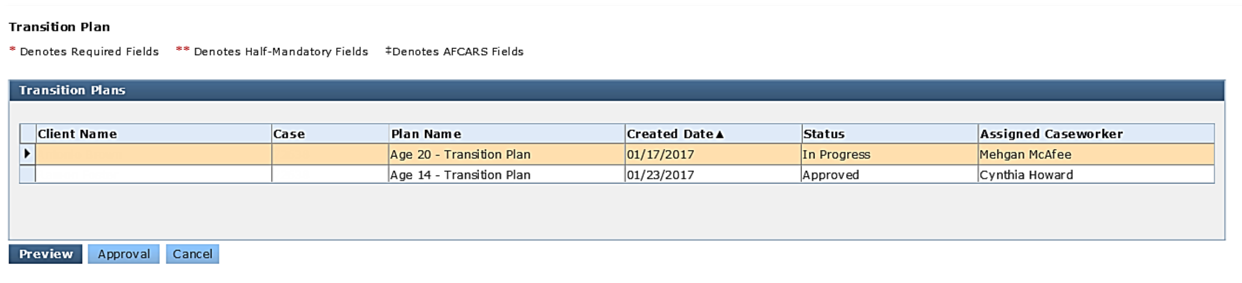
4. If a Transition Plan has been rejected, it will appear in the worker's **Rejected Transition Plans** pane on the Dashboard. The user can then make corrections to the Transition Plan and re-submit the Plan for approval by clicking **Save as Final** under **Goals & Action Steps**.

    Manager Feedback detailing the reasons for rejection can be viewed on the **Transition Plan Signature** screen.

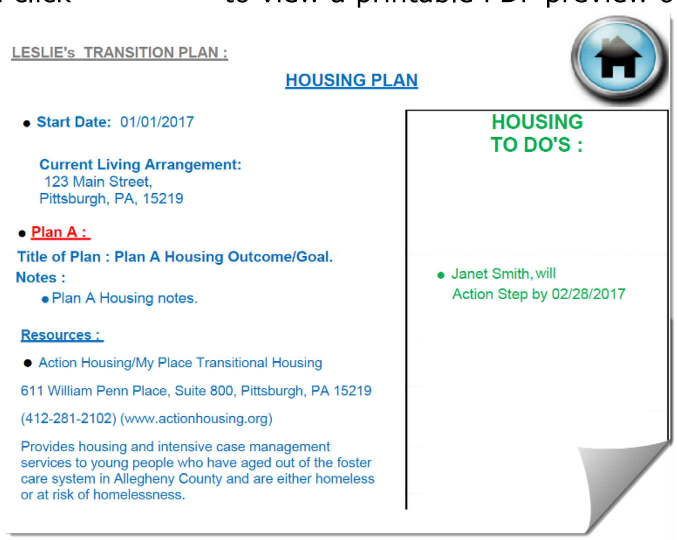
Transition Plan – CYF Active – CYF Supervisor Approvals

1. When a Transition Plan is completed for a CYF active Youth and Saved as Final, that Plan will be sent to the CYF Supervisor of the Youth's CYF case in KIDS.

2. The CYF Supervisor will find the request for approval listed in the Supervisor's *My Approval Inbox*. Clicking on this approval request will navigate the Supervisor to the **Case > Transition Plans** screen.



   a. To view a specific Transition Plan, select the desired Transition Plan from the *Transition Plans* grid and click **Preview** to view a printable PDF preview of the Transition Plan.



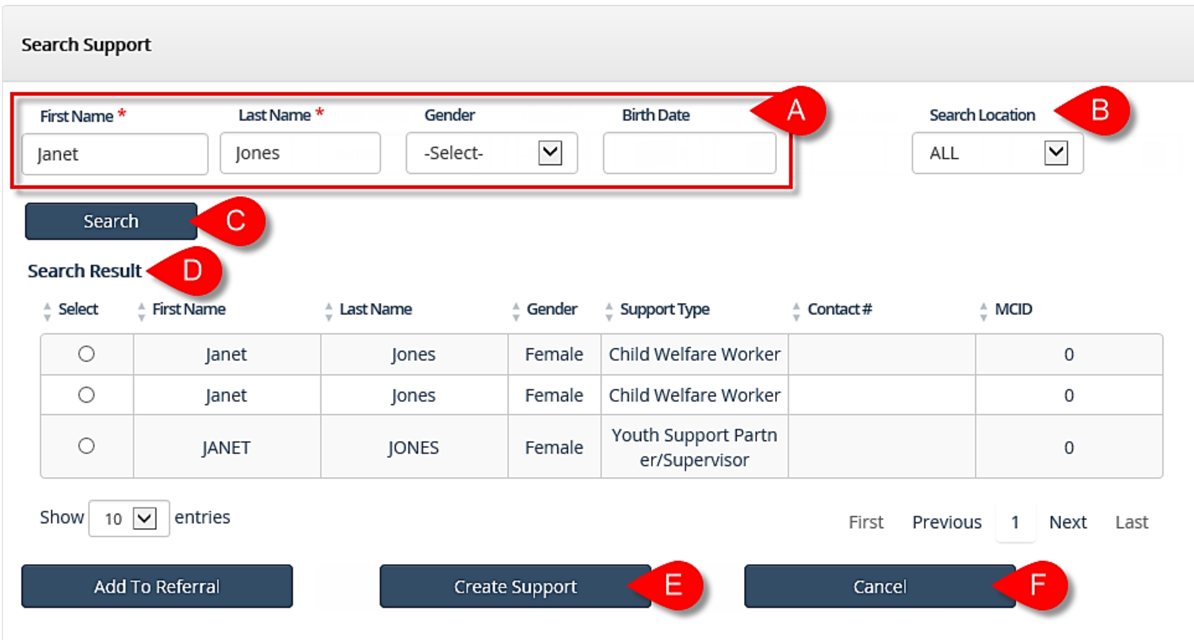
   b. To Approve or Reject a specific Transition Plan, select the desired Transition Plan from the *Transition Plans* grid and click **Approval**.

NOTE: *Transition Plans completed prior to February 2017 can be viewed in KIDS under:*

Case > Plans > Archived Plans > Archived Transition Plan > Archived Transition Plan List

Creating a New Support

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



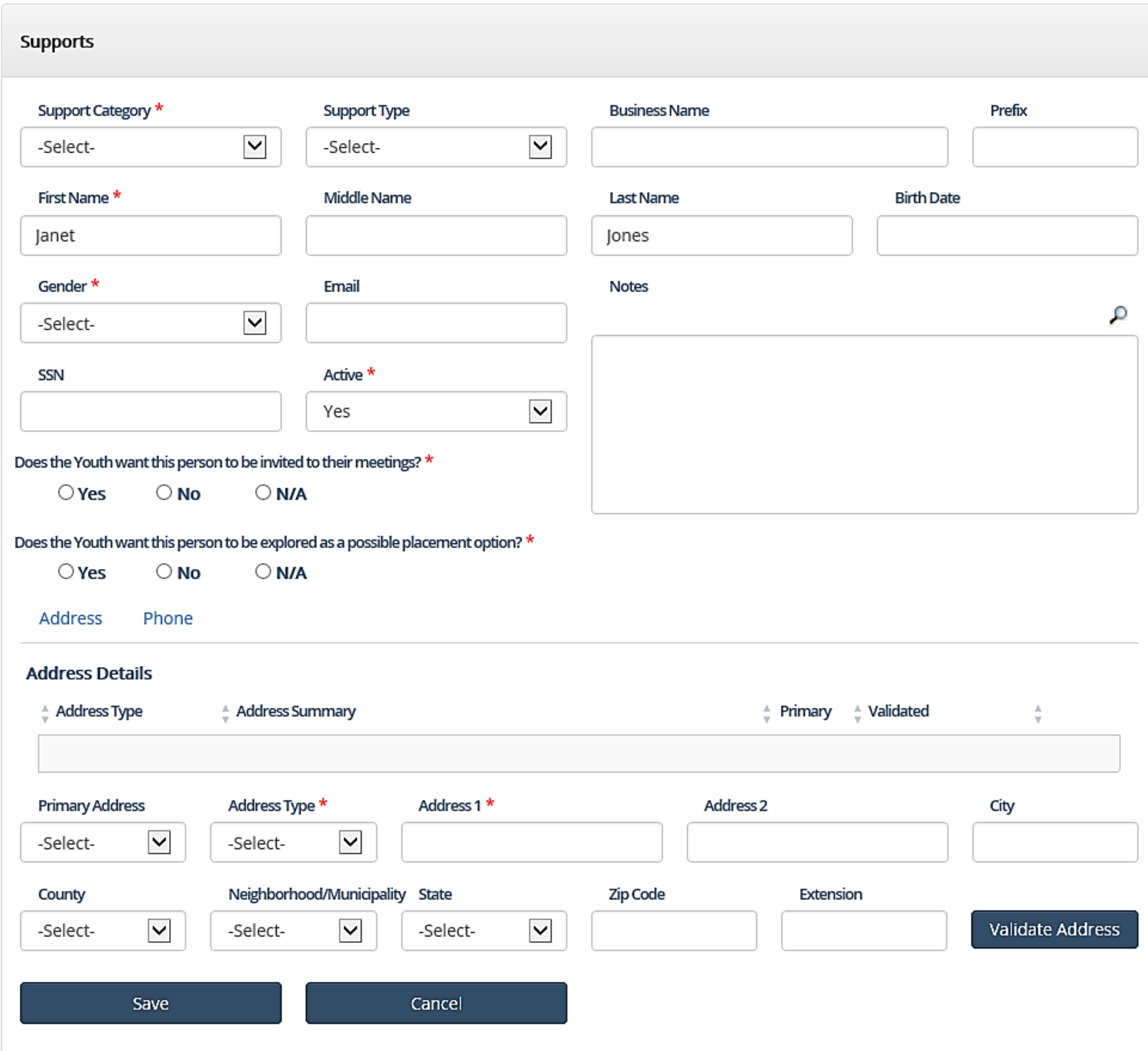
   a. Enter the *First Name* and *Last Name.* For Natural Supports enter (if known) *Gender* and *Birth Date*.
   b. Select the *Search Location*. Supports can be searched for in all of Synergy (Enterprise) or only in a specific program such as DHSSSP, YSP or HCM. The location defaults to "ALL".
   c. Click 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 Supports pop-up

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

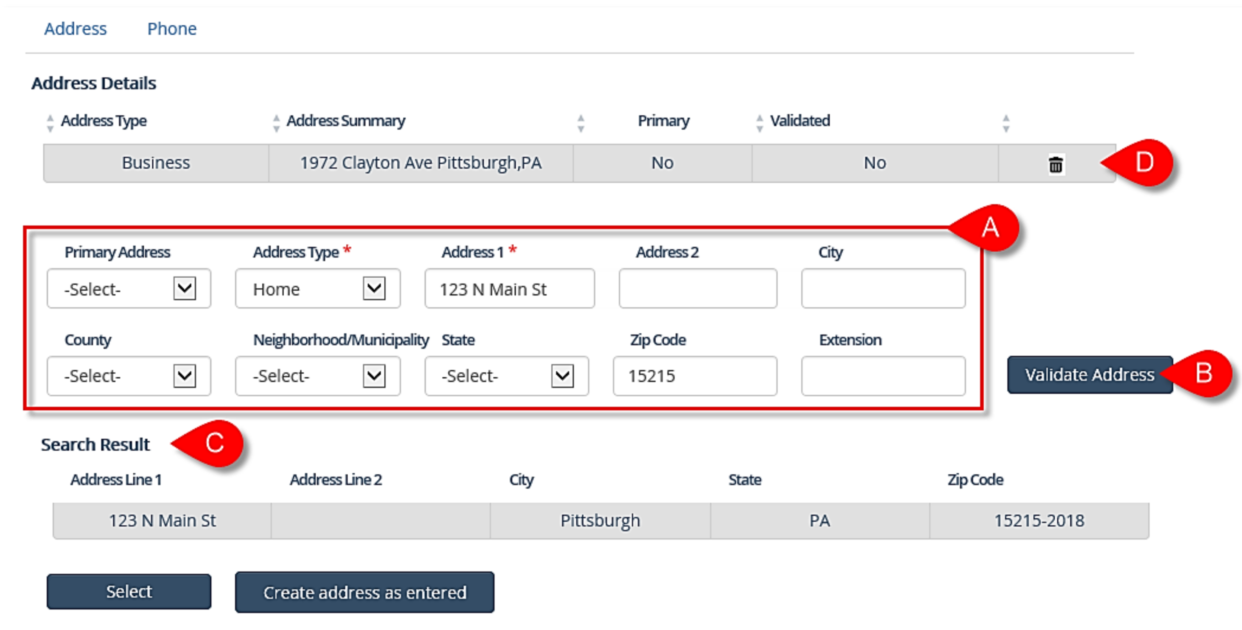


2. Enter all the relevant information for this Support in the *Supports* pop-up.
   a. The Support can be made Active or Inactive at any time by selecting "Yes" or "No" from the *Active* drop-down.

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.



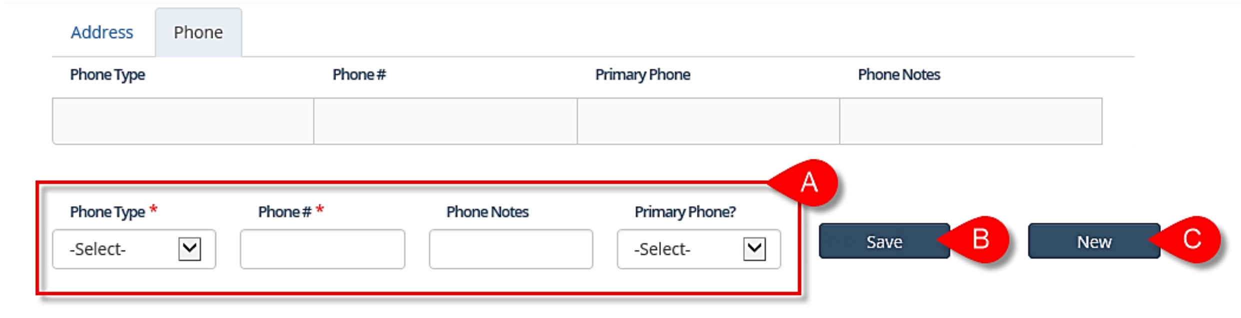
a. To enter a new address:
    i. Select whether or not the address is the individual's *Primary Address,* select the *Address Type*, and enter all of the known address information.

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 to delete.

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 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. If a phone number has been added in error, click the delete icon [🗑] to the right of the phone number in the *Phone* grid to delete it.
   d. To enter additional phone numbers, click **New**.

> ***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 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