



# Module Configuration – IL Job Aid

The *Module Configuration* screen allows managers to make unit assignment decisions as well as to select, at a per worker level, which items require supervisory approval.

## Admin Configuration

### Module Configuration

Approval Settings Supervisor Units 412 Youth Zone Units

**Approval Settings**

☐ Select workers who require Supervisor approval of Case Contacts

	User Role
<input type="checkbox"/> Watts, Lamont	YouthZone Coach
<input type="checkbox"/> Washington, Shante	Transition Planner Caseworker
<input type="checkbox"/> Wade, Michelle	YouthZone Coach
<input type="checkbox"/> Thompson, Amanda	Transition Planner Caseworker

☐ Select workers who require Supervisor approval of non-CYF Transition Plans

	User Role
<input type="checkbox"/> Watts, Lamont	
<input type="checkbox"/> Washington, Shante	
<input type="checkbox"/> Wade, Michelle	
<input type="checkbox"/> Thompson, Amanda	

Save

Approval Settings Supervisor Units 412 Youth Zone Units

**Supervisor Units**

Unit \*  
-Select- Show Unit

Educational Liasons

Add Educational Liason

Transition Planners

Approval Settings Supervisor Units 412 Youth Zone Units

**412 Youth Zone Units**

Unit \*  
Brecht, Alexander (Unit) Show Unit

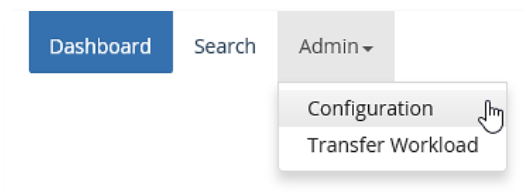
Coaches

Campbell, Willa	
Johnson, Shaune	
Pasley, Chelsie	

Add Coach

## Navigation

1. Using the static navigation tiles located at the top of every screen select **Admin > Configuration**



## Approval Settings

1. *Approval Settings*: Click on the *Approval Settings* tab.

### Module Configuration

Approval Settings   Supervisor Units   412 Youth Zone Units

▼ Approval Settings

**A**

☐ Select workers who require Supervisor approval of Case Contacts

	User Role
<input type="checkbox"/> Watts, Lamont	YouthZone Coach
<input type="checkbox"/> Washington, Shante	Transition Planner Caseworker
<input type="checkbox"/> Wade, Michelle	YouthZone Coach
<input type="checkbox"/> Thompson, Amanda	Transition Planner Caseworker

**B**

☐ Select workers who require Supervisor approval of non-CYF Transition Plans

	User Role
<input type="checkbox"/> Watts, Lamont	YouthZone Coach
<input type="checkbox"/> Washington, Shante	Transition Planner Caseworker
<input type="checkbox"/> Wade, Michelle	YouthZone Coach
<input type="checkbox"/> Thompson, Amanda	Transition Planner Caseworker

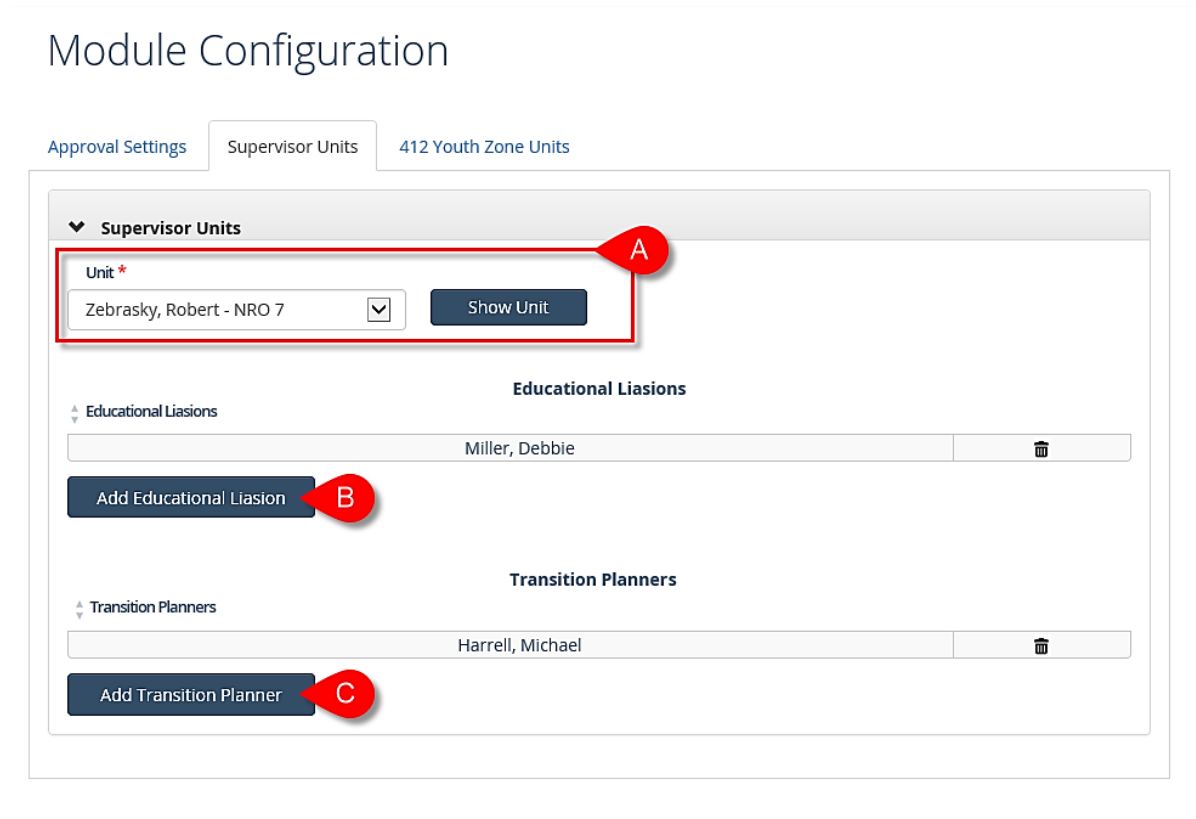
**C**

Save

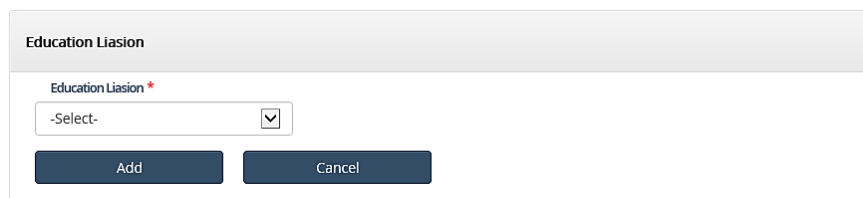
- Select workers who require Supervisor approval of Case Contacts*: To select specific workers, check the checkbox to the left of each worker who will be required to request approval on Contact Notes. To select all workers, check the checkbox above the first column above the grid.
- Select workers who require Supervisor approval of non-CYF Transition Plans*: To select specific workers, check the checkbox to the left of each worker who will be required to request approval on non-CYF Transition Plans. To select all workers, check the checkbox above the first column above the grid.
- Click **Save** to update the *Approval Settings*. These settings will be applied to the workers' accounts the next time the worker(s) log in to Synergy.

## Supervisor Units

1. **Supervisor Units:** Click on the *Supervisor Units* tab. This tab allows the IL Manager to assign Transition Planners and Educational Liaisons to specific CYF Units.

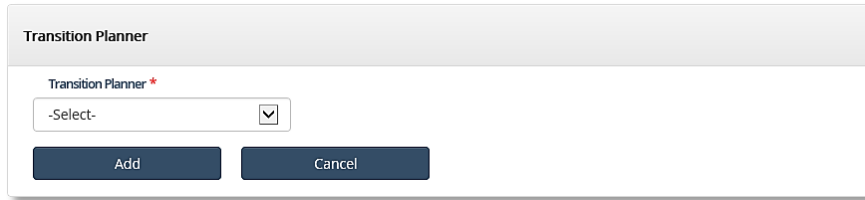


- a. **Unit:** Select a CYF Unit from the drop-down and click **Show Unit**. Any Educational Liaisons or Transition Planners who have already been assigned to this unit will be displayed in the *Educational Liaisons* and *Transition Planners* grids.
- b. **Add Educational Liaison:** Click **Add Educational Liaison** to add a new Educational Liaison to the selected unit.





Select the worker from the drop-down menu and click **Add**.  
Clicking **Cancel** will close the pop-up without saving the selection.


- c. *Add Transition Planner*: Click  to add a new Transition Planner to the selected unit.

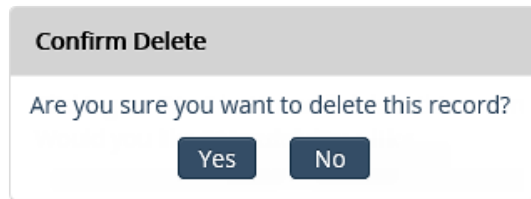


The form is titled "Transition Planner". It contains a label "Transition Planner" with a red asterisk. Below the label is a dropdown menu with the text "-Select-" and a checkmark icon. At the bottom of the form are two buttons: "Add" and "Cancel".


Select the worker from the drop-down menu and click .


Clicking  will close the pop-up without saving the selection.

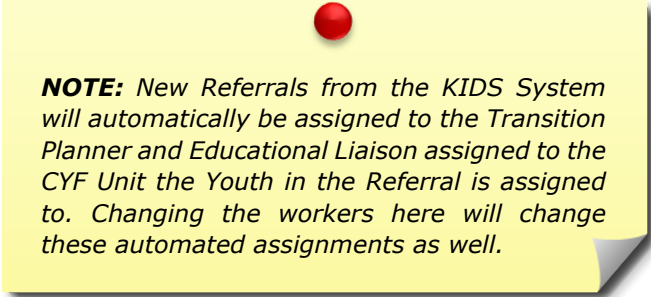
2. Removing an Educational Liaison or Transition Planner from the Unit: To remove a worker from the unit, click the Delete Icon [  ] to the right of the worker in the grid. A *Confirm Delete* pop-up will appear:



The form is titled "Confirm Delete". It contains the text "Are you sure you want to delete this record?". At the bottom of the form are two buttons: "Yes" and "No".

Clicking  will remove the worker from the unit.

Clicking  will cancel the action and the worker will not be removed.



**NOTE:** New Referrals from the KIDS System will automatically be assigned to the Transition Planner and Educational Liaison assigned to the CYF Unit the Youth in the Referral is assigned to. Changing the workers here will change these automated assignments as well.

## 412 Youth Zone Units

1. *412 Youth Zone Units*: Click on the *412 Youth Zone Units* tab. This tab allows the 412 Youth Zone Manager to assign Youth Coaches to specific 412 Youth Zone Units.

### Module Configuration

Approval Settings   Supervisor Units   **412 Youth Zone Units**

▼ 412 Youth Zone Units

Unit \*

Brecht, Alexander (Unit) ▼

Show Unit

▲ Coaches

Campbell, Willa	🗑️
Johnson, Shaune	🗑️
Pasley, Chelsie	🗑️

Add Coach

- Unit*: Select a 412 Youth Zone Unit from the drop-down and click **Show Unit**. Any Youth Zone Coaches who have already been assigned to this unit will be displayed in the grid.
- Add Coach*: Click **Add Coach** to add a new Youth Zone Coach to the selected Unit.

Coach


Coach \*

-Select- ▼

Add   Cancel

Select the worker from the drop-down menu and click **Add**.  
Clicking **Cancel** will close the pop-up without saving the selection.



2. Removing a Youth Zone Coach from the Unit: To remove a worker from the unit, click the Delete Icon [  ] to the right of the worker in the grid. A *Confirm Delete* pop-up will appear:

**Confirm Delete**  
Are you sure you want to delete this record?

Clicking  will remove the worker from the unit.

Clicking  will cancel the action and the worker will not be removed.

### For more information...

For assistance, please contact the Allegheny County Service Desk at [ServiceDesk@AlleghenyCounty.US](mailto: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>