



Referral Assignment – IL Job Aid

The *Referral Assignment* screen allows Admin/Supervisors to make assignments for their staff. The Referral can also be closed from this screen. The Referral cannot be closed if there is more than one worker still assigned to the Referral or if there are unapproved items on the Referral or if there are open IL Stipends. Workers can also use this screen to request Assignment closure.

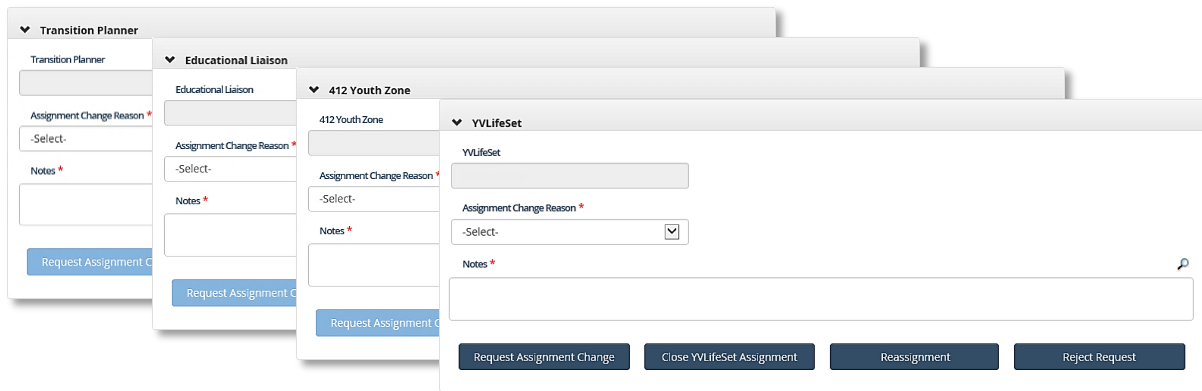
Referral Assignment

The screenshot shows the 'Assignment' screen for a referral. At the top, there's a 'Referral Summary - October November' section with fields for Referral Date, Referral ID, Referral Status (dropdown), Referral Category (dropdown), Transition Planner (dropdown), Educational Liaison (dropdown), 412 Youth Zone (dropdown), YVLifeSet (dropdown), Owner of Plan (dropdown), School Name, School Grade, Placement Agency, Placement Facility, Enrollment Status, and YV Start Date. There's also a checkbox for 'YVLifeSet Involvement'. Below this is a tabbed interface with tabs for 'Transition Planner', 'Educational Liaison', '412 Youth Zone', 'YVLifeSet', and 'Referral Closure'. The 'Transition Planner' tab is active, showing a 'Transition Planner' field, an 'Assignment' button, an 'Assignment Change Reason' dropdown, and a 'Notes' text area. At the bottom of the tab are four buttons: 'Request Assignment Change', 'Close Transition Planner Assignment', 'Reassignment', and 'Reject Request'. At the very bottom of the screen are 'Previous' and 'Next' navigation buttons.

Navigation

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

Assignments



1. Assignment and Closure functions the same for each worker role (Transition Planner, Educational Liaison, 412 Youth Zone, or YVLifeSet).
2. Creating assignments in Synergy:
 - a. KIDS Automated Referrals: When an Automated Referral is received from the KIDS System the Transition Planner and Educational Liaison are automatically assigned to the Referral based on what CYF Unit the Youth's CYF Case is assigned to. Synergy Specialists can update which Transition Planners and Educational Liaisons are assigned to specific CYF Units in the **Admin – Module Configuration** screen in Synergy.
 - i. 412 Youth Zone Assignment: These automated Referrals will appear on the 412 Youth Zone Admins' Dashboards as Pending. The 412 Youth Zone Admin must then assign the Referral to a specific 412 Youth Zone worker.
 - ii. YVLifeSet Assignment: Once the YVLifeSet Manager has flagged a Referral for YVLifeSet it will appear on the YVLifeSet Supervisors' Dashboards as Pending. The YVLifeSet Supervisor must then assign the Referral to a specific YVLifeSet Specialist (worker).
 - b. Referrals created within IL Synergy: When an Admin creates a new Referral the Referral's assignments will not be automatically assigned. The Admin must go to the **Referral Assignment** screen and assign the Referral. The Referral Status will remain as "Pending" until at least one worker has been assigned.
3. Changing or closing assignments in Synergy: All open items listed in the Current Notifications pop-up must be addressed before closure.

To access this list, click on the Closure Validation Folder Icon [] above the

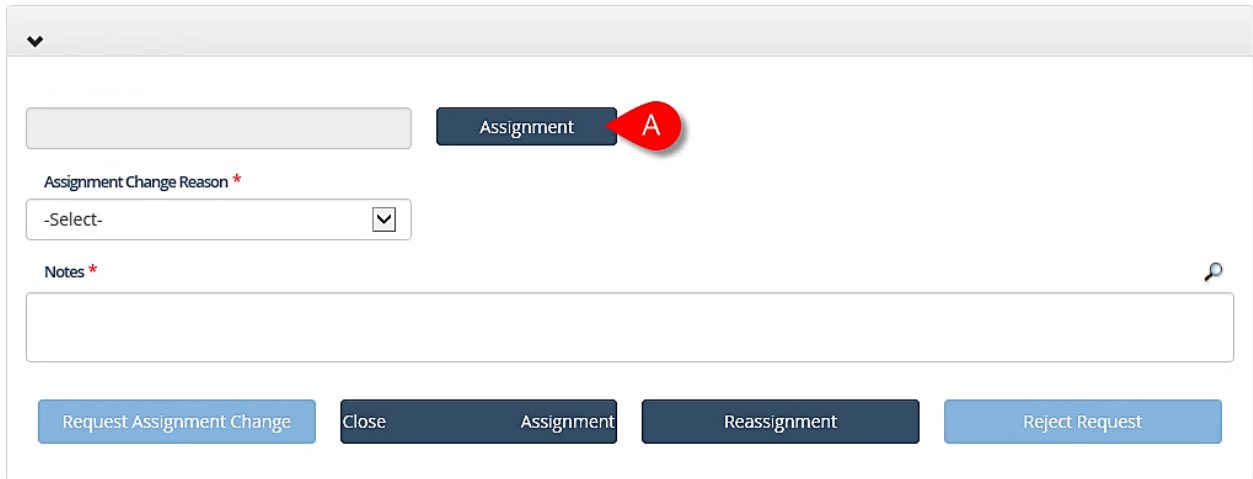
▼ Referral Summary

pane.

- a. Worker Request: Workers can request that their assignment be closed. This request will appear on the Admin/Supervisor's Dashboard. The Admin/Supervisor can:
 - i. Approve the assignment closure.
 - ii. Reassign the Referral to another worker with the same Role.
 - iii. Reject the request for reassignment.
- b. Closure: When the last assigned worker on the Referral is ready to close, that worker should request Referral Closure. If that worker's Assignment is closed this will also function as a Referral Closure.

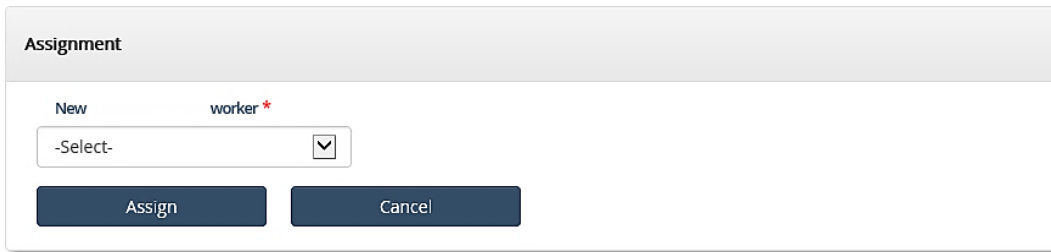
Admin/Supervisors: Assigning a Worker

1. If a worker has not yet been assigned to the Referral for a specific role the worker's Admin/Supervisor can click on the tab for the role that needs to be assigned.



The screenshot shows a web form titled "Assignment Change Reason". It features a dropdown menu for "Assignment Change Reason" with a red "A" icon next to it. Below this is a "Notes" field with a magnifying glass icon. At the bottom, there are five buttons: "Request Assignment Change", "Close", "Assignment", "Reassignment", and "Reject Request".

- a. Clicking the **Assignment** button will open the *Assignment* pop-up:



The screenshot shows a pop-up window titled "Assignment". It contains a dropdown menu for "New worker" with a red asterisk. Below the dropdown are two buttons: "Assign" and "Cancel".

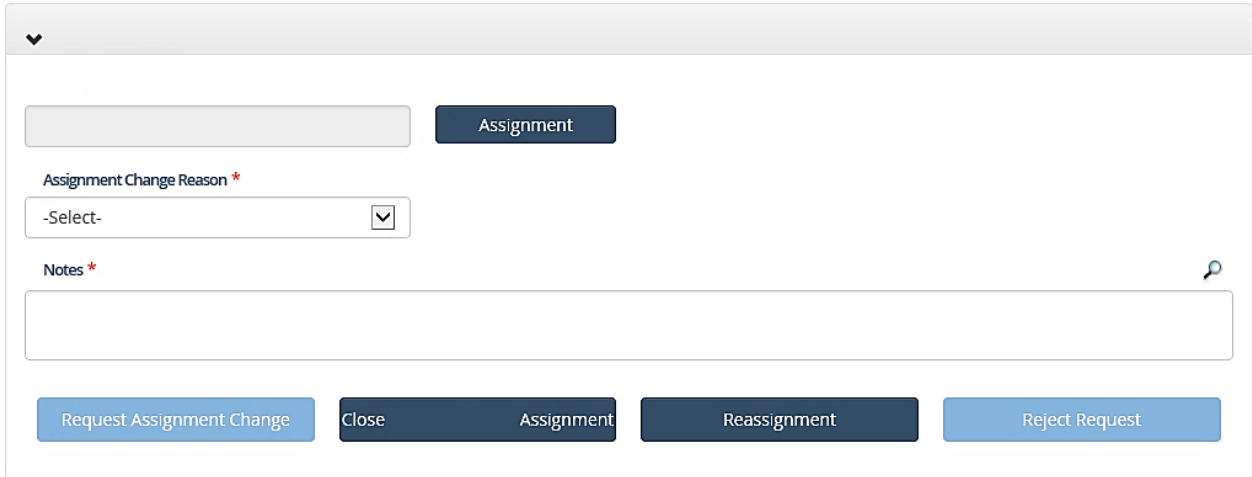
- i. *New ... worker*: Select the new worker from the drop-down menu and click **Assign**.

Clicking **Cancel** will close the *Assignment* pop-up without saving the assignment selection.

Reminder: The Transition Plan Owner can only be updated from the Referral Summary pane on the **Youth Info** screen.

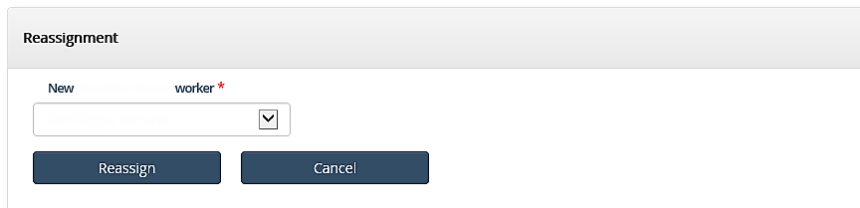
Admin/Supervisors: Reassigning a Referral to another Worker

1. Changing a Referral's assignment from one worker to another within a specific role: The worker's Admin/Supervisor will click on the tab of the role that needs to be reassigned.



A screenshot of a web form titled "Assignment Change Reason". It features a search bar at the top, a dropdown menu for "Assignment Change Reason" with a red asterisk, and a text area for "Notes" with a red asterisk and a magnifying glass icon. At the bottom, there are five buttons: "Request Assignment Change", "Close", "Assignment", "Reassignment", and "Reject Request".

- a. Admin/Supervisor:
 - i. Select the *Assignment Change Reason* from the drop-down and enter the details of why the assignment is being changed in the *Notes* text field.
 - ii. Click **Reassignment** to open the *Reassignment* pop-up:



A screenshot of a "Reassignment" pop-up form. It has a title bar "Reassignment" and a label "New worker" with a red asterisk. Below the label is a dropdown menu. At the bottom, there are two buttons: "Reassign" and "Cancel".

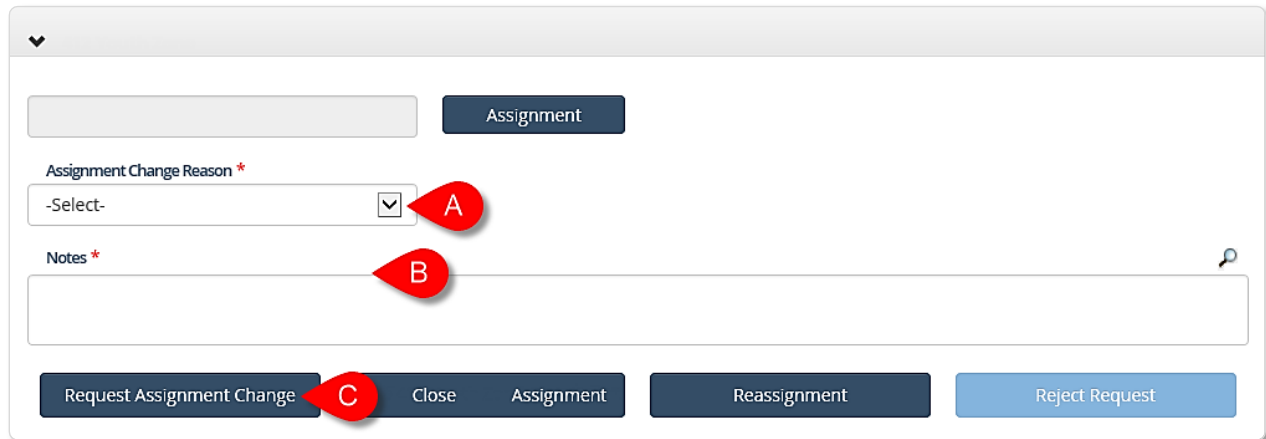
1. *New ... worker*: Select the new worker from the drop-down menu and click **Reassign**.

Clicking **Cancel** will close the *Reassignment* pop-up without saving the selection.

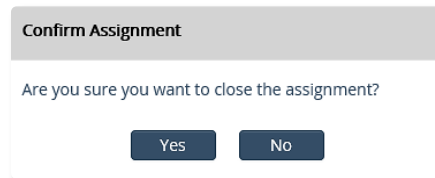
Tip: The assignment history can be viewed in the Referral Summary pane by clicking on the History Icon [🕒] to the right of Assigned Workers drop-downs.

Workers: Requesting Assignment Change

1. Requesting an assignment change: Click on the tab that matches the worker's role:

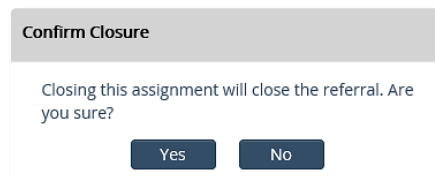


- a. *Assignment Change Reason*: Select the reason that the assignment is being changed from the drop-down.
- b. *Notes*: Enter details of the reason for changing the assignment.
- c. Click **Request Assignment Change**. Note: Assignment changes cannot be requested if the worker has any unapproved items on the Referral.
 - i. The worker will receive the confirmation pop-up "Are you sure you want to close the assignment?"



OR

If the worker is the last worker assigned to the Referral, the worker will receive the confirmation pop-up: "Closing this assignment will close the referral. Are you sure?"



- ii. Clicking **Yes** will send the request for assignment change to the worker's Admin or Supervisor for approval. Clicking **No** will cancel the request.



Admin/Supervisors: Approving or Rejecting a Reassignment Request

1. Reassignment Requests will appear on the Admin/Supervisor's Dashboard: Clicking on the *Role of the Worker* will navigate directly to the Assignment Change Request for that Referral.

The screenshot shows a table titled "Assignment Change Requests (1)". It has columns for Request Date, Referral ID, First Name, Last Name, Role of Worker, and Worker Name. The data row shows a request from 01/13/2017 for Referral ID 55116, assigned to Susie Sunshine, with the role of Education Liaison for worker Meghan McAfee. A search bar is at the top right, and pagination controls are at the bottom.

Request Date	Referral ID	First Name	Last Name	Role of Worker	Worker Name
01/13/2017	55116	Susie	Sunshine	Education Liaison	Mehgan McAfee

2. Assignment Change Request:

The screenshot shows the "Assignment Change Request" form. It includes a header with the request date and worker name, a dropdown for the reason, a text area for notes, and a text area for comments. At the bottom are buttons for "Request Assignment Change", "Close Assignment", "Reassignment", and "Reject Request".

Assignment Change Requested on 01/13/2017 by
Mehgan McAfee

Assignment Change Reason *

Achieved goals and has positive, perman ☒

Notes *

The Youth has turned 24 and achieved their IL goals.

Comments *

- a. To close the assignment without reassigning to a new worker, click .
 - i. The confirmation pop-up "Are you sure you want to close the assignment?" will appear.
- OR
- If the worker is the last worker assigned to the Referral, the confirmation pop-up: "Closing this assignment will close the referral. Are you sure?" will appear.
 1. Clicking will close the assignment. Clicking will close the pop-up without closing the assignment.
- b. To open the *Reassignment* pop-up and reassign the role to another worker, click and complete the *Reassignment* pop-up.
- c. To reject the request for assignment change or assignment closure, complete the *Comments* field and click .



Admin/Supervisors: Closing the Referral

1. The Referral can be closed by the Admin/Supervisor when the last assigned worker is finished working with the Youth.
 - a. Click on the *Referral Closure* tab on the **Referral Assignment** screen.
2. Completing the *Referral Closure* tab:

- a. *Closure Date*: The Closure Date will default to today's date.
- b. *Reason for Closure*: Select the Reason for Closure from the drop-down.
- c. *Notes*: Detail why the Referral is being closed in this field.
- d. Click **Close Referral**. The confirmation pop-up: "Are you sure you want to close the referral?" will appear:

Clicking **Yes** will close the Referral. Clicking **No** will close the pop-up and the Referral will remain open.

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>