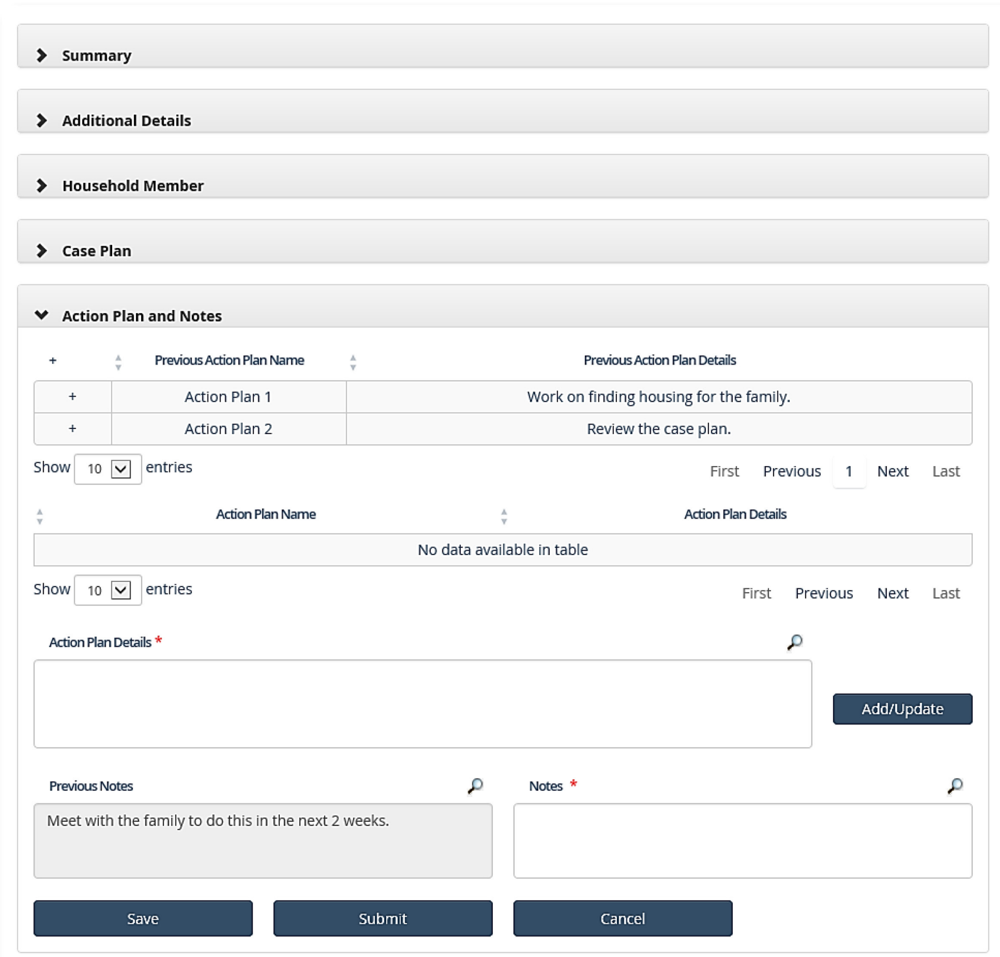
Supervisor Log – Independent Living Job Aid

The *Supervisor Log* screen is intended to help supervisors and staff serve clients more effectively and maintain compliance through regular Supervision reviews of important Referral information and the creation of worker Action Plans. Workers can view but cannot edit this screen.

Supervisor Log

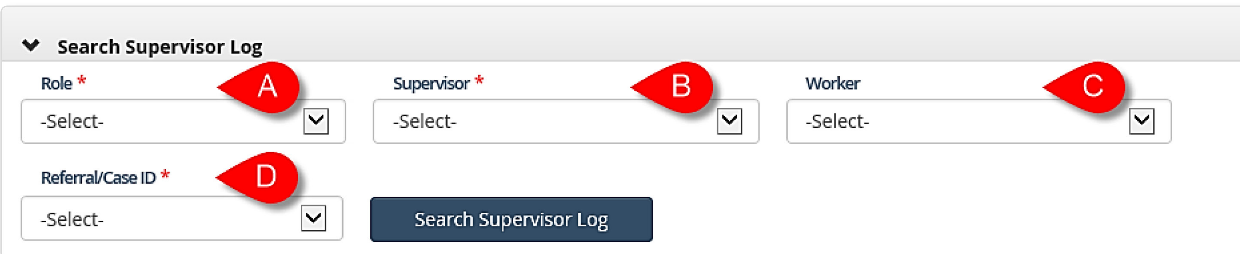


Navigation

1. From the Dashboard (Supervisors and Management only):
    a. Click on the Supervisor Log button above the Dashboard panes.
2. Locate the desired Referral and click on the *Referral ID* to bring the Referral into focus.
    a. Click on the Supervisor Log tile.

Search Supervisor Log

1. Supervisors and Management can search through and access Supervisor Logs for any worker by clicking on the **Supervisor Log** button above the Dashboard.
   This opens the **Search Supervisor Log** pane:



   a. *Role*: Admins can select one of the worker roles associated with their program from the drop-down. If there is only one worker role for the Admin's program, that role will automatically be selected.

   b. *Supervisor*: Managers can select a specific supervisor from the drop-down. Supervisors will see their own name selected automatically.

   c. *Worker*: Select a specific worker from the drop-down.

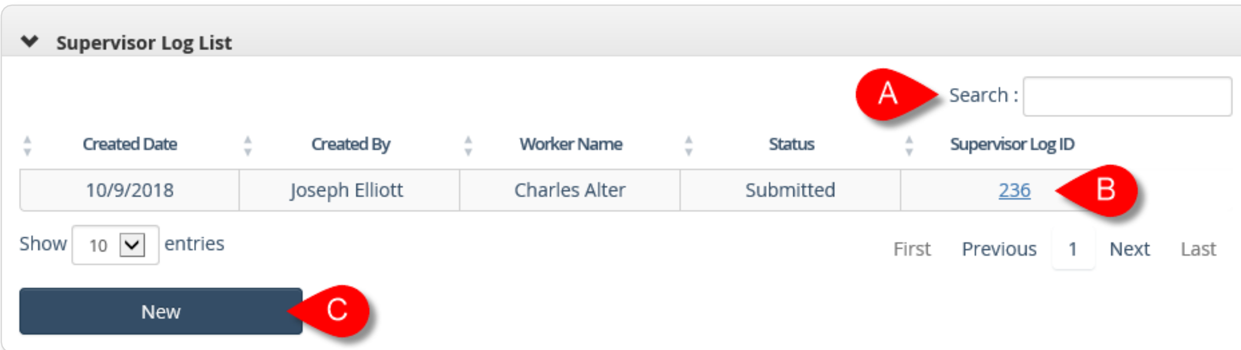
   d. *Referral/Case ID*: Once a specific worker is selected, that worker's Referrals will be displayed in the *Referral/Case ID* drop-down. Select a specific Referral and click **Search Supervisor Log**.

2. Once the **Search Supervisor Log** button is clicked all Supervisor Logs for the selected Referral will be displayed in the **Supervisor Log List** pane.

3. The **Supervisor Log List** pane can be accessed via the **Supervisor Log** Dashboard button or from within the Referral itself by clicking on the **Supervisor Log** tile.

Supervisor Log List

1. **Supervisor Log List** pane:



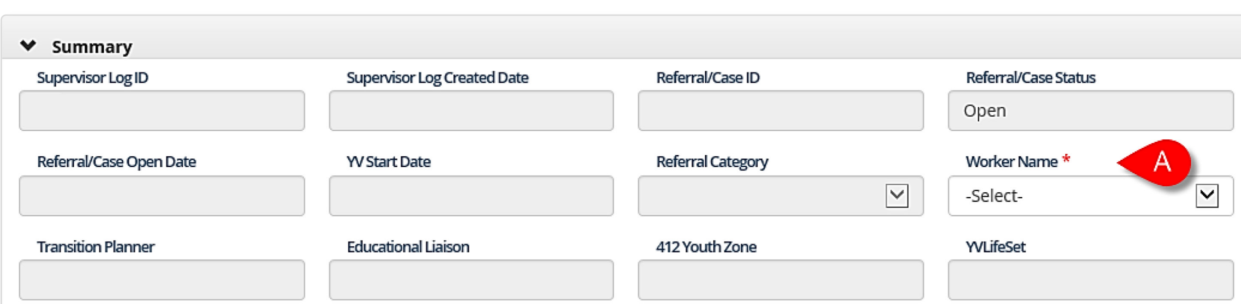
a. *Search*: This field allows the user to filter the grid down to specific log(s).
b. *Supervisor Log ID*: Click on the ID to navigate directly to that specific Supervisor Log.
c. *New*: Click the **New** button to start a new Log.

If there is a Supervisor Log that is still in draft status the **New** button will be inactive. The last Supervisor Log must be Submitted before a new one can be created.

NOTE: *All Supervisor Logs must be submitted before a Referral can be closed. A Supervisor Log with a status of "Draft" will prevent Referral closure.*

Supervisor Log – Summary Pane

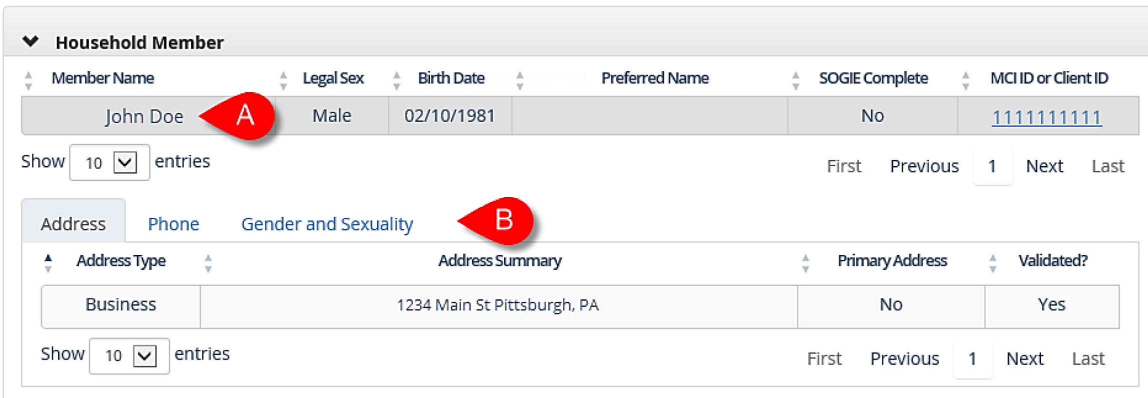
1. **Summary** pane: This pane displays basic information about the Referral.



a. *Worker Name*: From the drop-down, select the assigned worker who will be completing the Action Plan that is detailed in this Supervisor Log.

Supervisor Log – Informational Panes

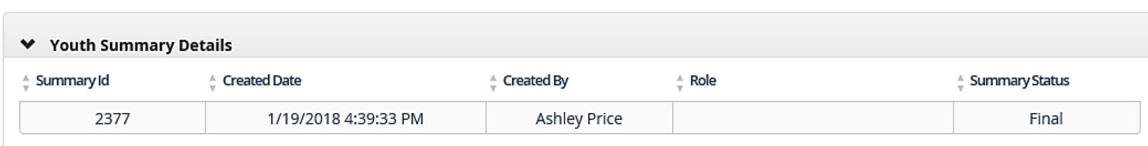
1. **Household Member** pane: This pane displays all the active Household Members on this Referral and includes the Household Member's *Address*, *Phone*, and *Gender and Sexuality* information.



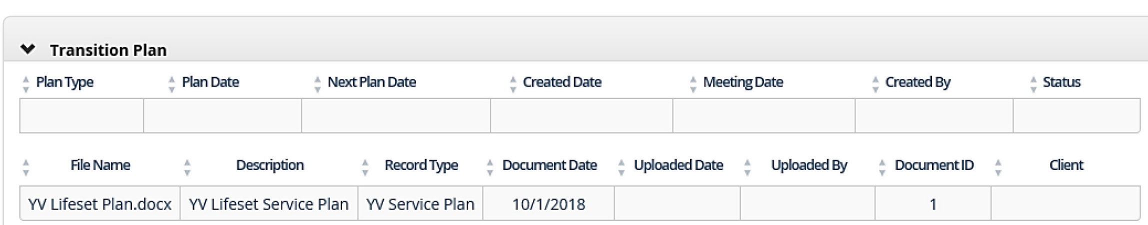
   a. To view a specific Youth's information, click on that individual in the *Household Member* grid.

   b. The **Address** tab is displayed first by default. To view the *Phone* or *Gender and Sexuality* information for the selected individual, click on the **Phone** or **Gender & Sexuality** tabs.

2. **Youth Summary Details** pane: This pane displays a list of Youth Summaries for this Referral.

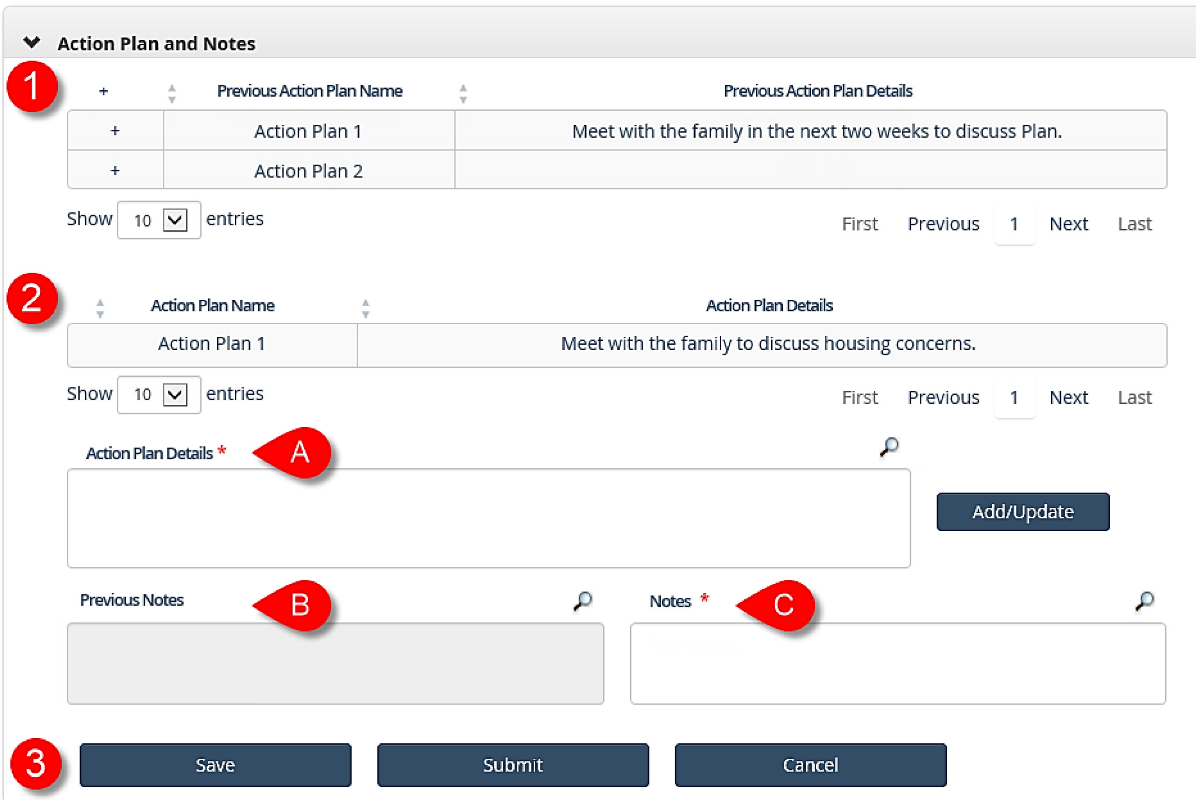


3. **Transition Plan** pane: This pane displays a list of the Transition Plans and/or YV Lifeset Plans. **NOTE:** Only the latest uploaded STAN Plan will appear. In order to be displayed here YV Lifeset Plans must be uploaded in the **Document Folder** screen and must have a *Document Date* entered as well as a *Record Type* of "YV Service Plan"

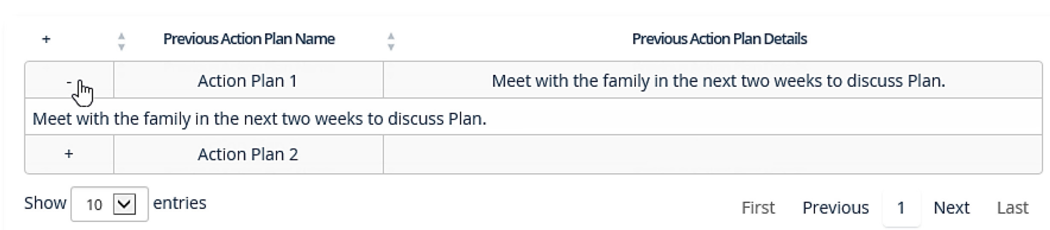


Completing the Action Plan and Notes Pane

Action Plan and Notes pane: Supervisors can use this pane to document the next actions for the Worker to take as well as any relevant notes. ***Reminder:*** A Worker must be selected from the *Worker Name* drop-down in the Summary pane before an Action Plan can be saved.

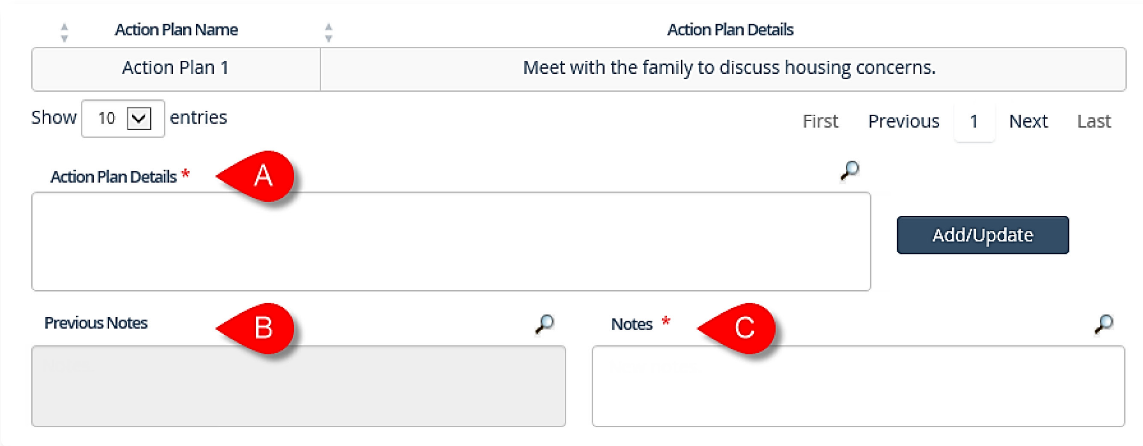


1. Previous Action Plans: If previous Action Plans have been submitted, the prior plans will be visible in the Previous Action Plan grid. To view the details of a specific Action Plan, click on the [**+**] to the left of the Action Plan in the grid. To close the expanded view, click on the [**-**] that now appears to the left of that Action Plan in the grid.



To view the *Action Plan Details* for all of the Action Plans in the current page of the grid, click on the [**+**] above the grid. To collapse all of the *Action Plan Details*, click on the [**-**] that now appears above the grid.

2. Documenting an Action Plan:



   a. *Action Plan Details*: Enter the details of the Action Plan in the narrative text box. Click **Add/Update** to add the entry to the *Action Plan* grid.
      i. To edit an existing entry, click on the desired entry in the *Action Plan* grid, update the *Action Plan Details* and click **Add/Update**.

   b. *Previous Notes*: The notes from the last submitted Action Plan will appear here and will be read-only.

   c. *Notes*: Enter any relevant notes here. These notes apply to the group of current action plans as a whole and are not specific to a single Action Plan entry.

3. **Save**, **Submit**, and **Cancel**:
   a. To save the current entries in Draft form, click **Save**. Action Plans in Draft status can be edited.
   b. To finalize the Action Plan, click **Submit**. Action Plans are not editable after they have been submitted.
   c. Clicking **Cancel** will navigate back to the *Action Plan List*, any unsaved information will be lost.

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