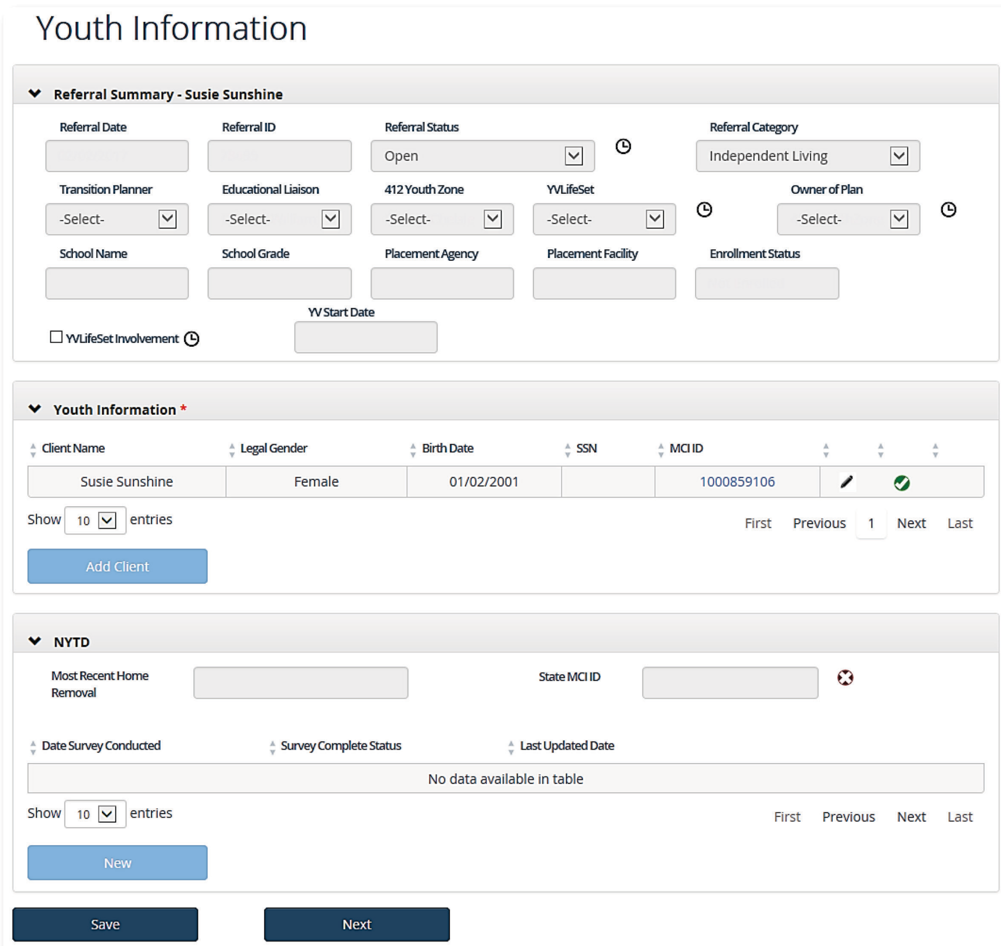
Youth Info – IL Job Aid

Referrals can be received from the KIDS System or created within the Independent Living Synergy system. The *Youth Information* screen is the first screen that must be completed on a new Referral and contains basic demographic information on the Youth as well as the NYTD Survey documentation pane. NYTD instructions can be found on the **NYTD – IL Job Aid**.

Youth Info screen



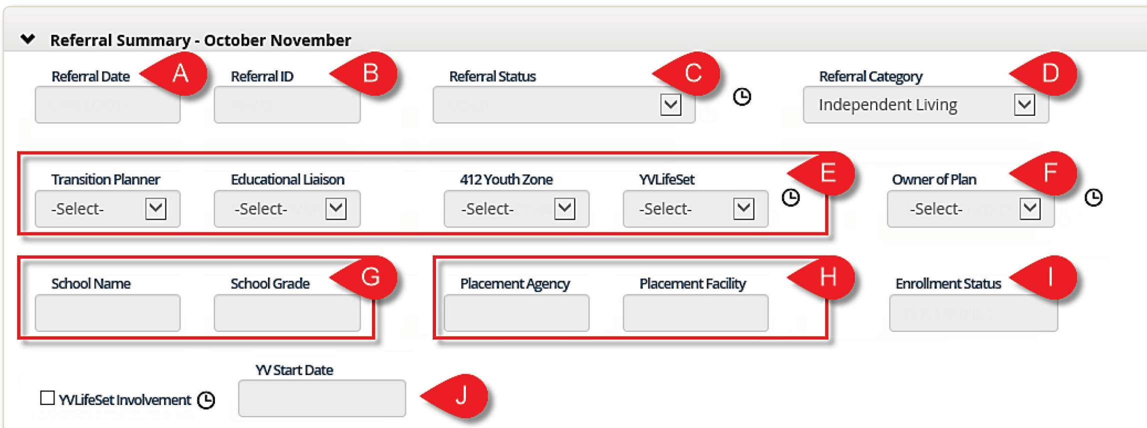
Navigation

1. From the **Dashboard**: Locate the desired Referral and click on the *Referral ID* to bring the Referral into focus. The user will automatically be navigated to the **Youth Info** tile.

2. The **Previous** and **Next** buttons at the bottom of the screen can be used to navigate up or down one screen within the Left Navigation tiles.

Referral Summary

1. **Referral Summary** : This pane will be displayed at the top of every Referral screen and will include the Youth's name in the header. This pane contains the following information:

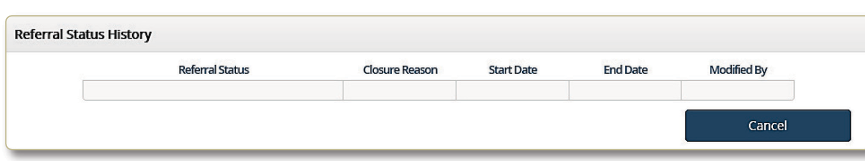


a. *Referral Date*: This date defaults to the date that the Referral was entered in Synergy but can be changed.

b. *Referral ID*: Once the *Youth Information* screen has been saved for the first time a Referral ID will be generated by Synergy and cannot be changed.

c. *Referral Status*: The statuses are: Pending, Open, or Closed.
The *Referral Status* defaults to "Pending" on all new Referrals. Once at least one worker has been assigned the status will change automatically to "Open".
Referrals can be closed from the **Referral Assignment** screen.

   i. The History Icon **[ ]** next to the *Referral Status* drop-down, when clicked, will open the *Referral Status History* pop-up. This pop-up contains the history of the Referral including all prior Pending, Open, or Closed statuses for the Referral including the date and time of each status change.

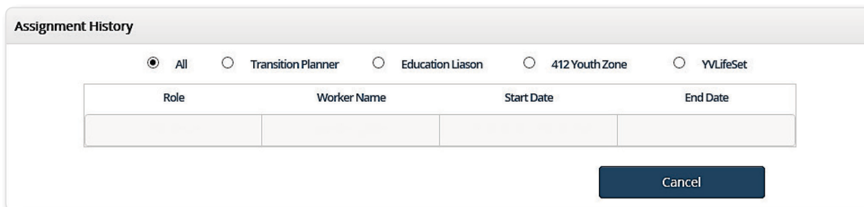


To close the *Referral Status History* pop-up, click **Cancel**.

d. *Referral Category*: The type of referral, Independent Living or Homeless, will be indicated in this drop-down.

e. *Transition Planner, Educational Liaison, 412 Youth Zone, and YVLifeSet*: These drop-downs indicate the names of the current Transition Planner, Educational Liaison, 412 Youth Zone Coach, and YVLifeSet Specialist assigned to the Referral. Only one worker of each type can be assigned at any given time. Assignments can only be made or changed from the **Referral Assignment** screen.

   i. The History Icon [ ] next to the assignment drop-downs, when clicked, will open the *Assignment History* pop-up. This pop-up contains the history of all prior assignments to the Referral including the *Start Date* and *End Date* of each assignment episode.



   The *Assignment History* grid defaults to *All* but can be filtered to a specific Role using the Role radio buttons.

   To close the *Assignment History* pop-up, click **Cancel**.

f. *Owner of Plan*: This drop-down is used to select which Assignment Role is currently responsible for completing the Transition Plan.

   i. The History Icon [ ] next to the *Owner of Plan* drop-down, when clicked, will open the *Owner of the Plan History* pop-up. This pop-up contains the history of Plan ownership including the date and time of each change as well as the staff person who entered the Plan Ownership update.

   To close the *Owner of the Plan History* pop-up, click **Cancel**.

g. *School Name* and *School Grade*: These fields display the Youth's school and current grade based on the information entered on the **Education Info** screen.

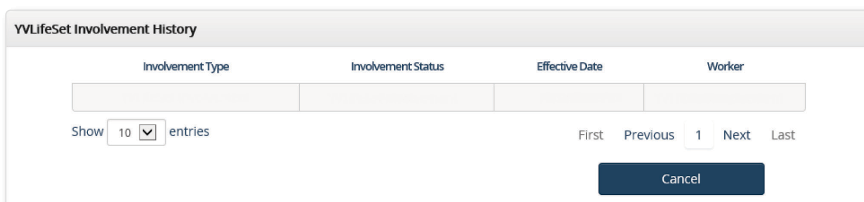
h. *Placement Agency* and *Placement Facility*: If the Youth has an open Case in the KIDS System and is in placement, the *Placement Agency* and *Placement Facility* information will be displayed here based on the information entered in the KIDS system. Note: The placement information will only be displayed if the placement has been completely documented in the KIDS System. If CYF and/or the placement provider have not completed the placement entry documentation the placement information will not be displayed in Synergy.

i. *Enrollment Status*: This indicates the school enrollment status of the Youth based on the information entered on the **Education Info** screen.

j. *YVLifeSet Involvement* and *YV Start Date*:
   i. YVLifeSet Managers can flag a Referral for YVLifeSet Involvement by checking the ☑ *YVLifeSet Involvement* checkbox.

   ii. Once the ☑ *YVLifeSet Involvement* box is checked the *YV Start Date* can be entered.

   iii. The History Icon **[ ]** next to *YVLifeSet Involvement*, when clicked, will open the *YVLifeSet Involvement History* pop-up. This pop-up contains the history of YVLifeSet involvement including the date and time of each change as well as the staff person who made the change.



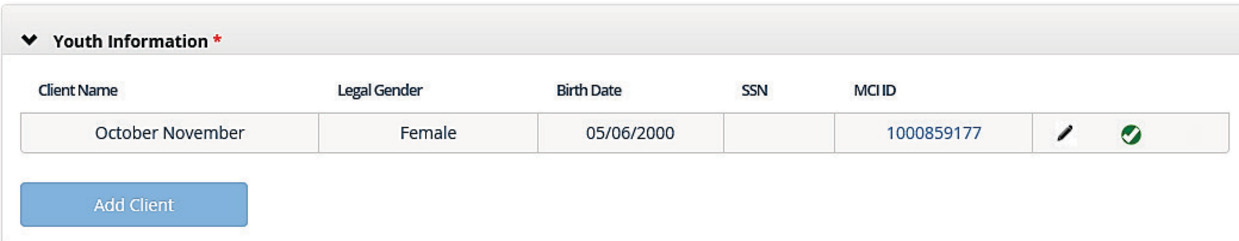
To close the *YVLifeSet Involvement History* pop-up, click **Cancel**.

TIP: *The Referral Date, Referral Category and Owner of Plan can only be updated on the Youth Information screen by the applicable Supervisory staff.*

Only the YVLifeSet Manager can update the YVLifeSet Involvement.

Youth Information

1. Youth Information: This pane contains basic demographic information for the Youth. If the Youth has already been entered, clicking on the Youth's first name will open the *Youth Information - Details* pop-up.



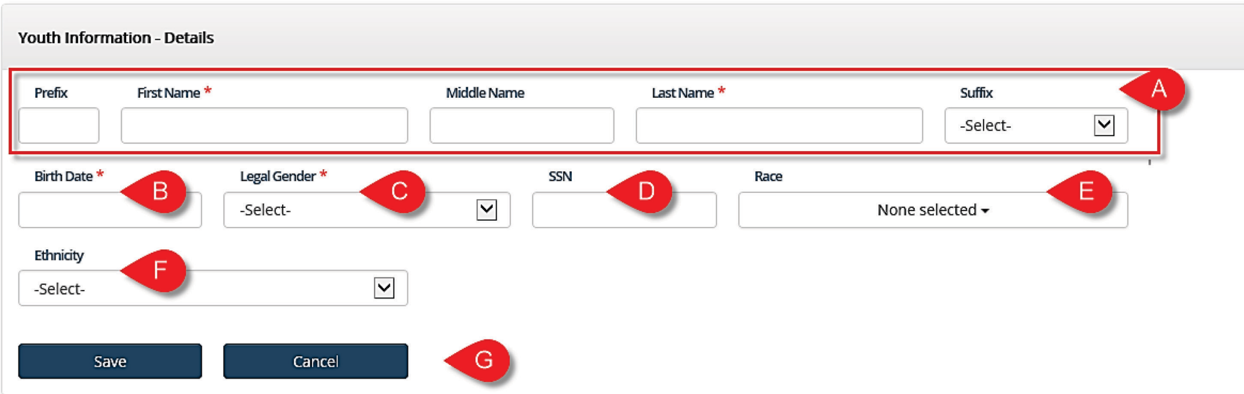
   a. Editing Youth Information: If the Youth has already been entered, click the Edit Icon [ ] to the right of the Youth in the *Youth Information* grid. This will open the *Youth Information – Details* pop-up.
   b. The icon to the right of the MCI number in the *Youth Information* grid indicates whether or an MCI clearance has been performed.
      i. A indicates that an MCI clearance has not been performed.
      ii. A indicates that an MCI clearance has been performed.
      iii. To clear or re-clear an MCI click on the or the .
      iv. Clicking on the MCI ID for an individual will open Client View and display the individual's information in Client View.

*See **Page 7** of this Job Aid for instructions on how to MCI Clear a Youth.*

   c. If this is a new Referral and the Youth has not been entered, click Add Client to open the *Youth Information – Details* pop-up and enter the Youth's information.

***TIP:** SOGIE information – such as Preferred Name, Gender, and Pronouns – can be documented on the Contact Info screen.*

2. Completing the *Youth Information – Details* pop-up:



   a. *Prefix, First Name, Middle Name, Last Name* and *Suffix*: Enter the Youth's *First Name* and *Last Name*. If applicable also enter the Youth's *Prefix, Middle Name,* and *Suffix*.

   b. *Birth Date*: Enter the Youth's date of birth.

   c. *Legal Gender*: Select the Youth's Legal Gender from the drop-down.

   d. *SSN*: If known, enter the Youth's Social Security Number (SSN).

   e. *Race*: This drop-down is a MultiSelect drop-down. Select all that apply.

   f. *Ethnicity*: Select the Youth's Ethnicity from the drop-down.

   g. Click **Save** to save any changes made to the *Youth Information – Details* pop-up. Clicking **Cancel** will close the *Youth Information – Details* pop-up without saving the information that was entered or updated.

3. Click **Save** at the bottom of the screen to preserve any changes made to the **Referral Summary**, **Youth Information**, and **NYTD** panes.

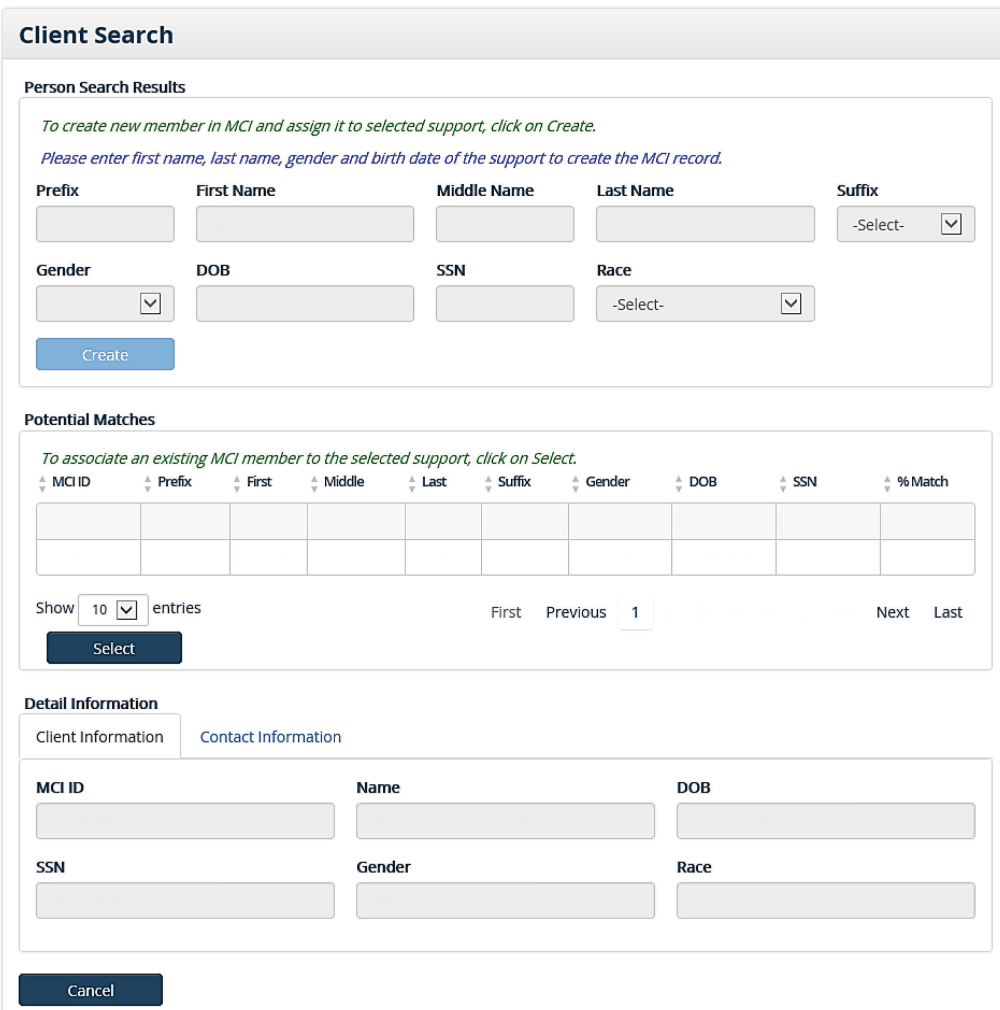
Instructions on registering a youth for the NYTD Survey and documenting the Survey can be found on the ***NYTD – IL Job Aid***.

MCI (Master Client Index) Clearing

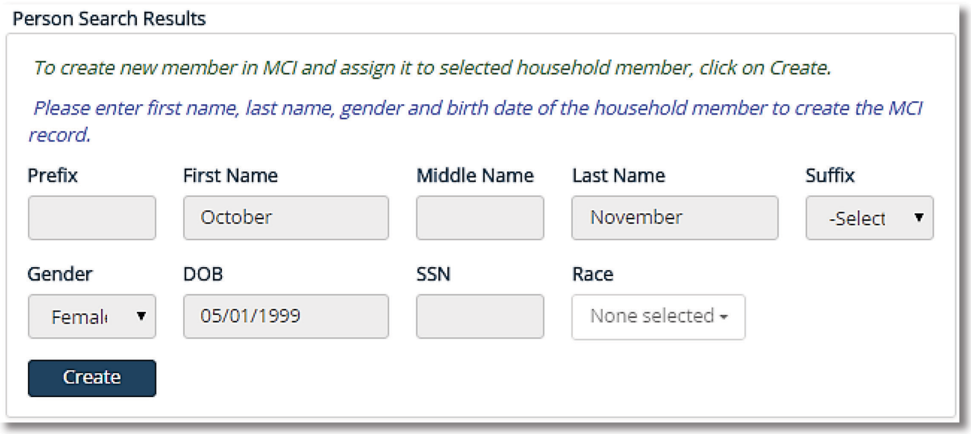
DHS' goal is to ensure that all services, connections, and information for an individual are connected to one ID, the Master Client Index ID (MCI ID).

The MCI Clearance process assists in this by helping to minimize the possibility of duplicate MCI IDs within DHS applications.

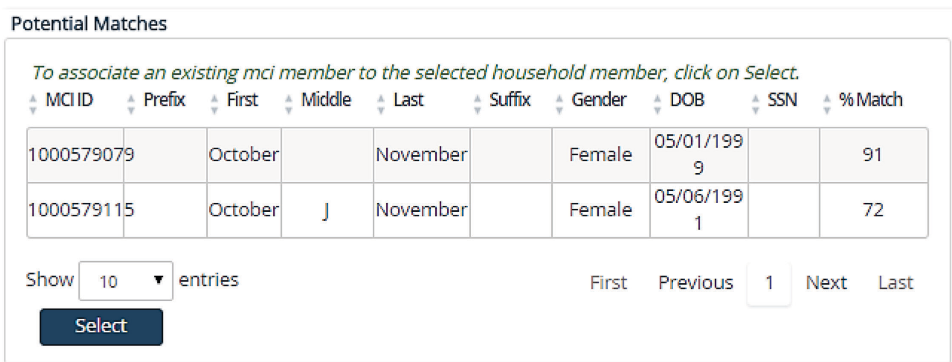
1. Individuals who have an MCI (Master Client Index) ID in the grid have already been cleared but they can be re-cleared if necessary. To open the MCI Clearance pop-up, select the desired individual and click on the MCI Clearance Icon [or].



2. The *Person Search Results* section contains the information that has been entered in this Referral for this individual. Compare this information to the *Potential Matches* section.



   a. The *Potential Matches* section contains a grid of all possible matches. Note the *% Match* column. This percentage refers to how likely it is that the desired individual is this person based on the demographic data entered.


Potential Matches

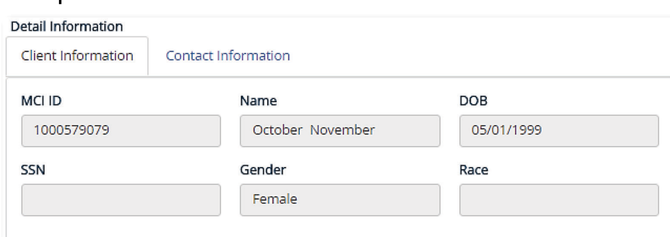
To associate an existing mci member to the selected household member, click on Select.

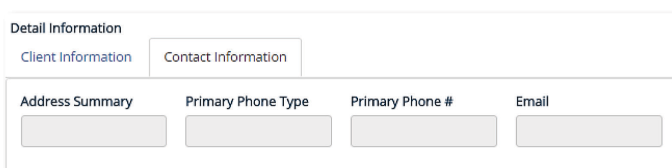
MCI ID	Prefix	First	Middle	Last	Suffix	Gender	DOB	SSN	% Match
1000579079		October		November		Female	05/01/1999		91
1000579115		October	J	November		Female	05/06/1991		72

Show 10 entries — First Previous 1 Next Last

Select

      i. To view more information on the Potential Match, click on the person's name in the grid. The *Detail Information* tabs will update to include that person's information.





3. After reviewing the *Person Search Results*, determine whether the individual is one of the potential matches.
   a. If the desired individual is one of the potential matches, select that Potential Match in the grid and click **Select**.

   Note: *If there is a Potential Match with a % Match of 95% or higher in the Person Search Results that Potential Match must be selected in order to MCI Clear the individual. Synergy will not allow a new MCI ID to be created.*

   b. If the desired individual is NOT one of the potential matches click **Create** to create a new MCI ID for this individual.

   c. To close the MCI *Client Search* pop-up without creating or selecting an MCI ID, click **Cancel**.

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