

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

 Referral Summary - Sus 	ie Sunshine					
Referral Date	Referral ID	Referral Status		Referral Category		_
62262.02677	20.48	Open	⊻ G	Independent Livi	ng 🔽]
Transition Planner	Educational Liaison	412 Youth Zone	YVLifeSet		ner of Plan	•
-Select-	-Select-	-Select-	-Select-	-Se	elect-	J
School Name	School Grade	Placement Agency	Placement Facility	Enrollment Status		
				Reference		
VLifeSet Involvement	YV Start Da	ate				
Vouth Informatica *						
Youth Information						
Client Name	🖕 Legal Gender	🛓 Birth Date	‡ SSN	1CI ID	Å Å	Å V
Susie Sunshine	Female	01/02/2001		1000859106		
Show 10 💌 entries				First Pre	vious 1 N	lext Last
Add Client						
	1					
V NYTD						
NYTD Most Recent Home			State MCUD] n	
✓ NYTD Most Recent Home Removal			State MCI ID		•	
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NYTD Most Recent Home Removal Date Survey Conducted Show 10 entries	÷ Survey Complet	e Status 🛟 L No data availab	State MCI ID .ast Updated Date le in table	First	Previous N	lext Last
	÷ Survey Complet	e Status 🔅 t No data availab	State MCI ID ast Updated Date le in table	First	Previous N	lext Last
NYTD Most Recent Home Removal Date Survey Conducted Show 10 New	÷ Survey Complet	e Status ‡ L No data availab	State MCI ID ast Updated Date le in table	First	Previous N	lext Last

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:

Referral Date A	October November Referral ID	Referral Status	C 9	Referral Category D Independent Living
Transition Planner -Select-	Educational Liaison	412 Youth Zone -Select-	WLifeSet -Select- ☑ ᠑	Owner of Plan F -Select- V
School Name	School Grade	Placement Agency	Placement Facility	Enrollment Status
□ YVLifeSet Involvement (W Start Date	•		

- 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.

Cancel

 ciosare recusori	Start Date	End Date	Modified By
			Cano

To close the Referral Status History pop-up, click

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 dropdowns 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 [^(C)] 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.

) All	0	Transition Planner	O Educ	ation Liason	412 Youth Zor	ne O	YVLifeSet
	Role		Worker	Name	Star	t Date	E	nd Date
1								

The Assignment History grid defaults to \odot 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.

Worker Name	Role	Modified Date	Modified By

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.

Involvement Type	Involvement Status	Effective Date	Worker
how 10 🖌 entries		First Previ	ous 1 Next Last
			Cancel

To close the YVLifeSet Involvement History pop-up, click





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.

Name	Legal Gender	Birth Date	SSN	MCHD	
October November	Female	05/06/2000		1000859177	1 0

- a. Editing Youth Information: If the Youth has already been entered, click the Edit Icon [I 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 \bigotimes indicates that an MCI clearance has not been performed.
 - ii. A \checkmark indicates that an MCI clearance has been performed.
 - iii. To clear or re-clear an MCI click on the \bigotimes or the \checkmark .
 - iv. Clicking on the MCI ID for an individual will open Client View and display the individual's information in Client View.



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.

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TIP: SOGIE information – such as Preferred Name, Gender,	
and Pronouns – can be documented on the Contact	
Info screen.	1



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

Youth Informa	ation - Details			
Prefix	First Name *	Middle Name	Last Name *	Suffix A -Select-
Birth Date *	Legal Gender *	SSN SSN	Race	None selected -
Ethnicity -Select-	F			
Sav	e Cancel	G		

- 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.

 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 [So or So].

lient Sea	arch								
erson Search	Results								
To create nel Please enter	w member in first name, la	MCI and as	sign it to select	ted suppo h date of th	rt, click on Ci ne support to	reate. o create the Me	Cl record.		
Prefix	Firs	t Name		Midd	le Name	Last Nan	ne	Suf	fix
						- jonus		-	Select-
Gender	DOI	В		SSN		Race			
						-Select	L-	\checkmark	
Create									
otential Matc	hes								
To associate	an existing M	ICI member	to the selected	<i>d support,</i>	click on Sele	ect.	A DOB	≜ SSN	≜ %Match
•	y · · · ·	v · · · · ·	y mane	Y LOUGE	y Danist	y Contra	y 202	y 2011	y ·····
Show 10 🔽	entries				First Pr	revious 1			Next Last
Selec	t								
etail Informa	tion								
Client Informa	ation Cor	ntact Inform	nation						
MCI ID			Name				DOB		
103051828				11. 11. 11. 11. 11. 11. 11. 11. 11. 11	0.25321		04/23/2003		
SSN			Gende	er			Race		



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.

Person Search Results									
<i>To create new member in MCI and assign it to selected household member, click on Create. Please enter first name, last name, gender and birth date of the household member to create the MCI record.</i>									
Prefix	First Name	Middle Name	Last Name	Suffix					
	October		November	-Select 🔻					
Gender	DOB	SSN	Race						
Female 🔻	05/01/1999		None selected 🗸						
Create									

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								
<i>To associate an exi.</i> † MCI ID	s <i>ting mci</i> † First	<i>member t</i> † Middle	o the select 🝦 Last	ed housel † Suffix	h <i>old memb</i> ÷ Gender	er, click on s † DOB	Select. † SSN	🖕 % Match
1000579079	October		November		Female	05/01/199 9		91
1000579115	October	J	November		Female	05/06/199 1		72
Show 10 T er	tries				First	Previous	1 N	lext Last

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.

Client Internation	Contact Information	
Clienciniormation	Contact miormation	
MCI ID	Name	DOB
1000579079	October Novem	1ber 05/01/1999
SSN	Gender	Race
	Female	
etail Information		
etail information		
Client Information	Contact Information	
Address Summary	Primary Phone Type	Primary Phone # Email
	, ,	,,



- 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 <u>ServiceDesk@AlleghenyCounty.US</u> or call 412-350-HELP (4357). Select Option 2 for the DHS Service Desk.

To access iService, go to: <u>https://servicedesk.alleghenycounty.us</u>

This and other Job Aids can be found at: http://s3.amazonaws.com/dhs-application-support/index.htm