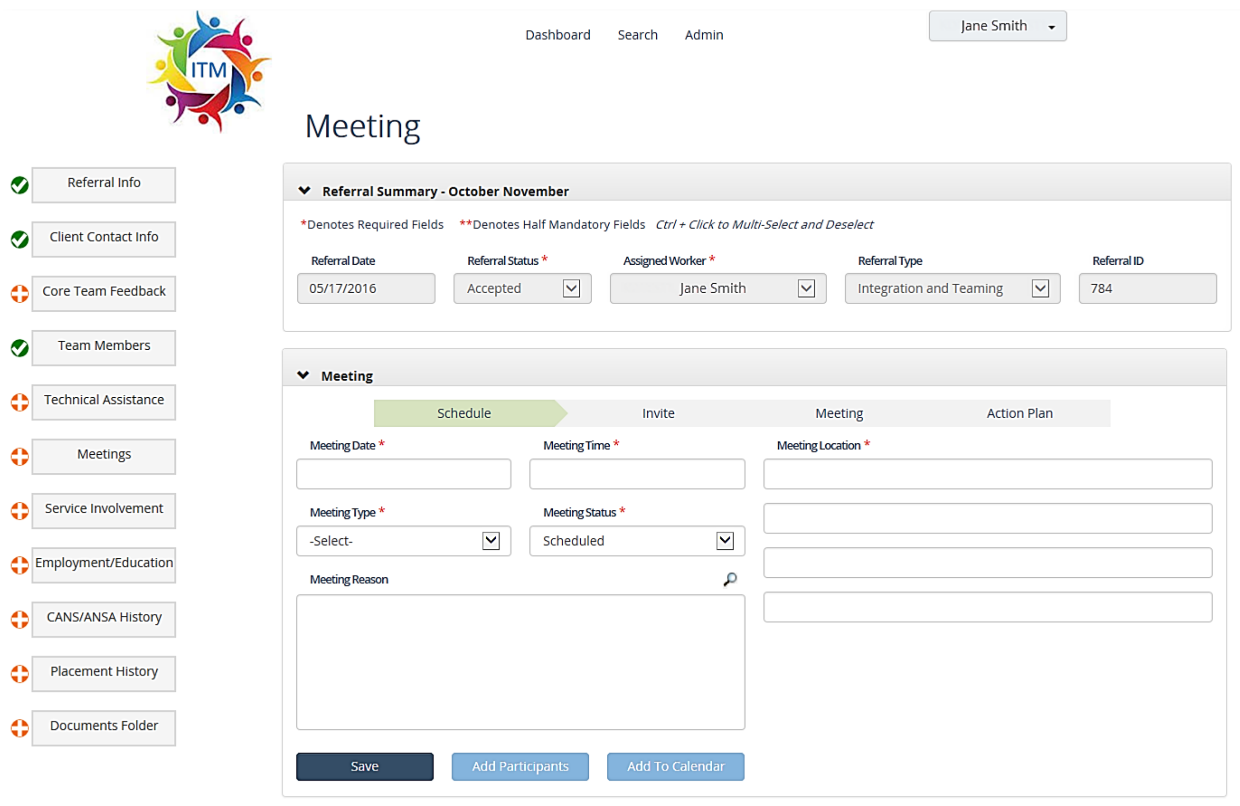
Meetings – ITM Job Aid

The *Meetings* screen is used to document the Integration and Teaming Meetings that are held to assist the client. Invitations, scheduling, record of attendance and documentation of the Action Plan all occur on this tile.

Meetings

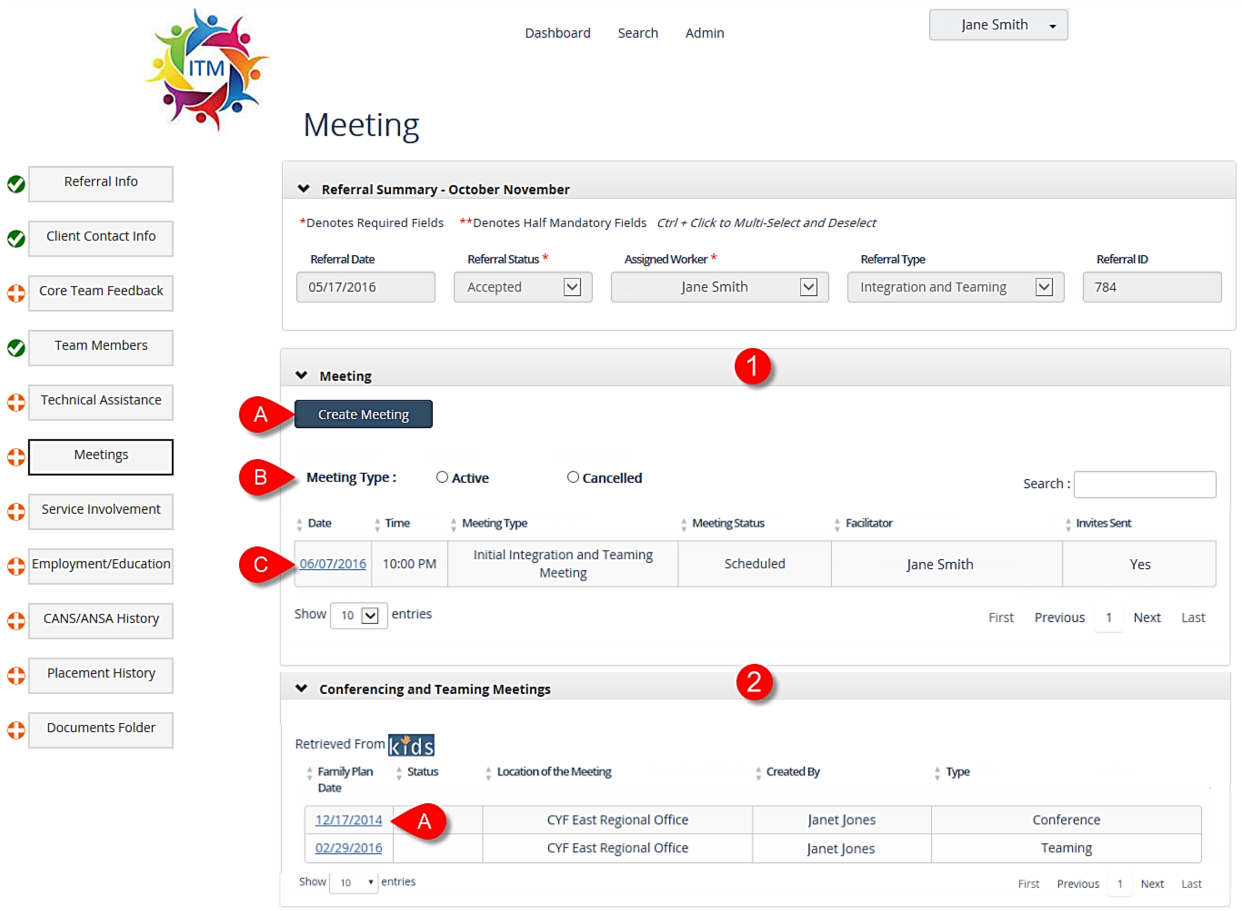


Navigation

1. From the **Dashboard**: Locate the desired Referral and click on the *Referral ID* to bring the Referral into focus.
    a. Click on the **Meetings** tile.
2. Core Team Members:
    a. Use the *Search* screen to locate the desired Referral. Click on the *Referral ID* in the *Search Results* to bring the Referral into focus.
    b. Click on the **Meetings** tile.

Meetings – List screen

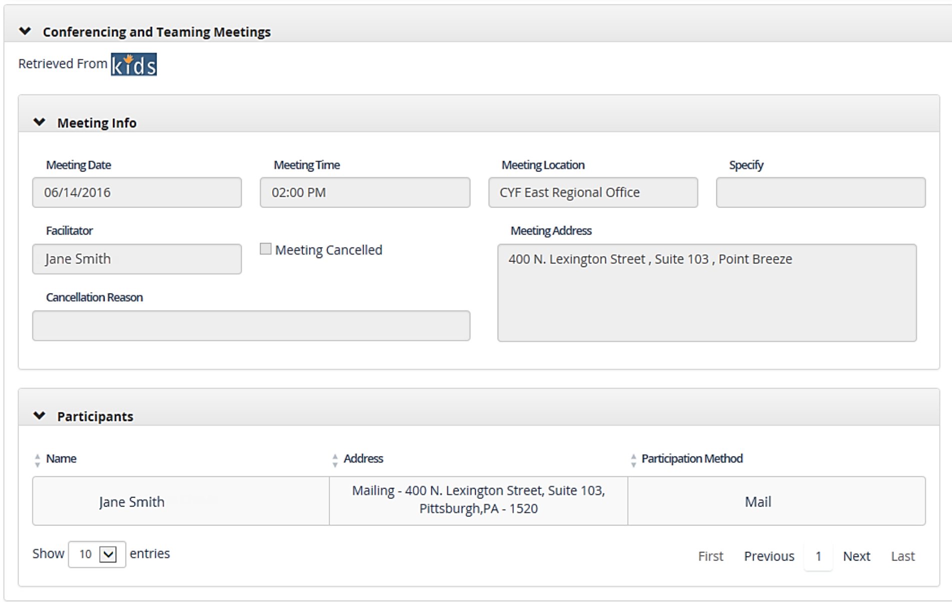
The Meetings list screen is the first screen to appear when the user navigates to the *Meetings* screen.



1. **Meeting**: This pane contains a list of the Meetings created in this Referral.
   a. Click **Create Meeting** to create a new Meeting.
   b. The *Meeting* grid can be filtered to either *Active* or *Cancelled* meetings only using the *Meeting Type* Radio buttons.
   c. To navigate to a Meeting that has already been created click on the *Date* of the desired meeting in the grid.

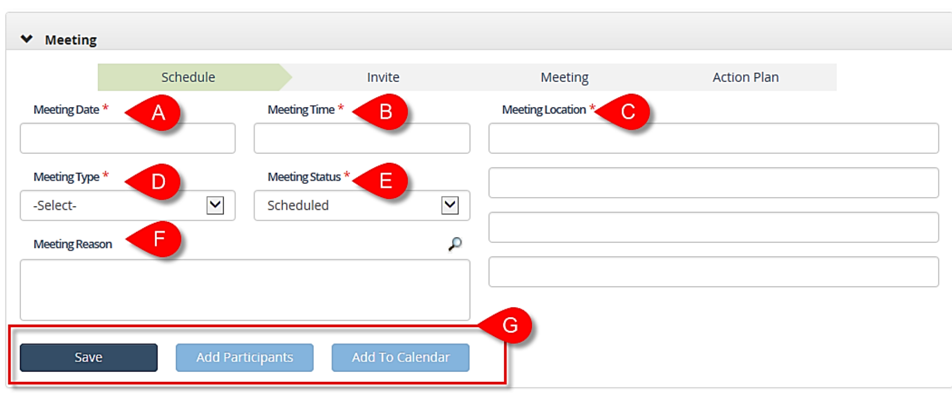
2. **Conferencing and Teaming Meetings**: If the Client is CYF active this pane will display a list of the Conferences and Teamings that have occurred or are scheduled to occur.
   a. To view Meeting Information and a list of participants click the *Date* of the desired meeting in the grid.

b. Two new sub-panes will appear inside the **Conferencing and Teaming Meetings** pane:



c. To refresh the Meetings screen click on the **Meetings** tile.

Meetings – Schedule

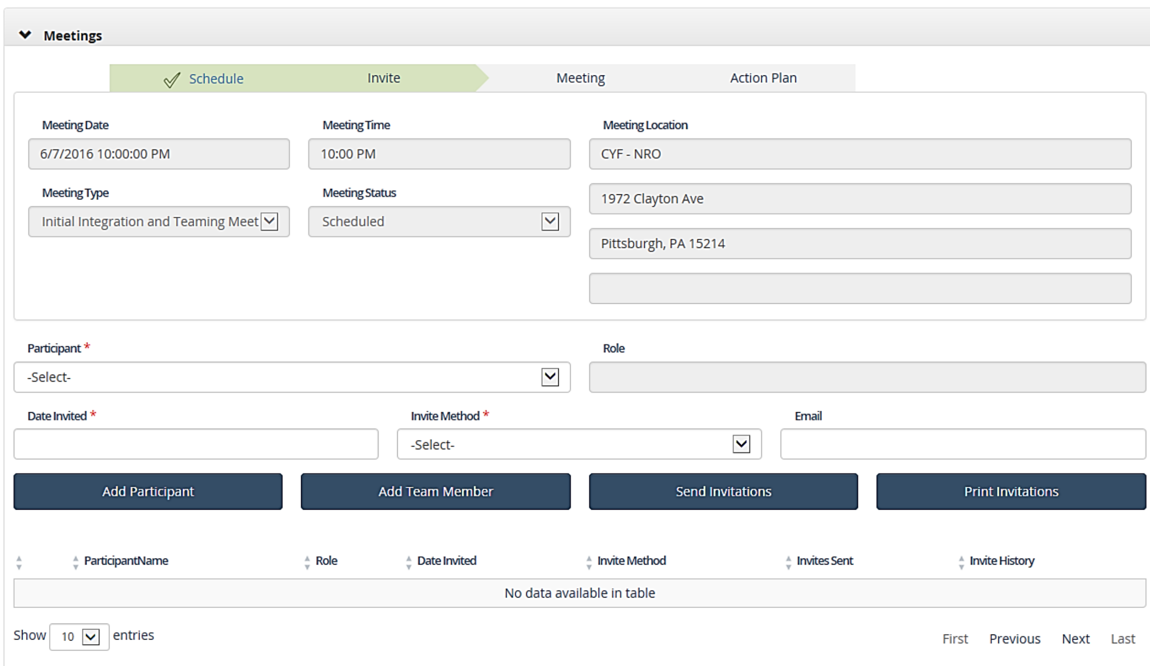


1. Click **Create Meeting** to create a new Meeting and complete the *Schedule* section.
   a. *Meeting Date*: Enter the date of the Meeting, cannot be a past date.
   b. *Meeting Time*: Enter the time of the Meeting.
   c. *Meeting Location*: Enter the name and address of the Meeting Location in the 4 address lines.
   d. *Meeting Type*: Select the type of Meeting from the drop-down.
   e. *Meeting Status*: Select the status of the Meeting from the drop-down.
   f. *Meeting Reason*: Enter the reason why the Meeting is being held.

g. Click **Save** to save the entered information and enable the other buttons. To generate an Outlook Calendar appointment for the meeting click **Add to Calendar**. To move on to the Invite section click **Add Participants**.

Meetings – Invite

1. Adding Participants:



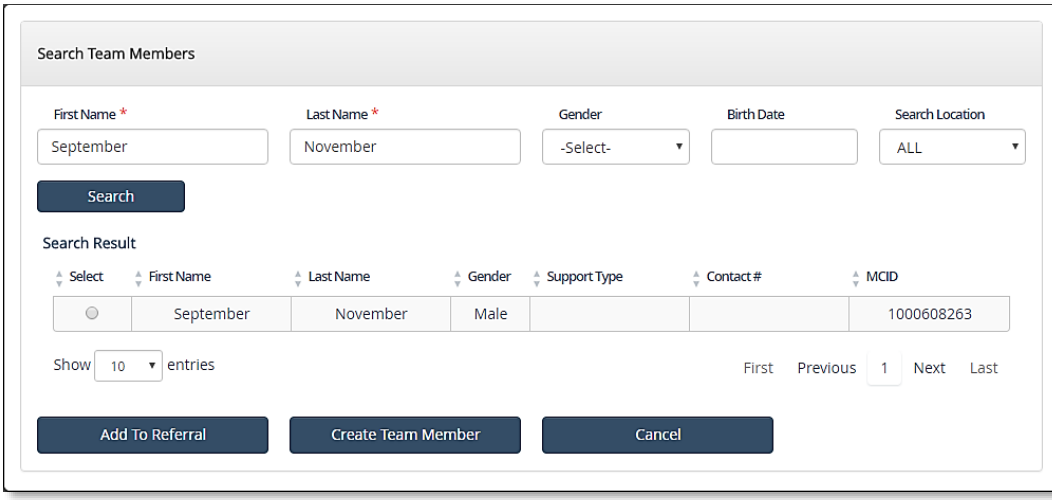
a. *Participant*: Select the Person to be invited from the *Participant* drop-down. The *Role* will automatically populate based on the information entered for that individual in the Referral.

b. *Date Invited*: Enter the date the participant was invited to the Meeting.

c. *Invite Method*: Select how the participant was invited. If "EMAIL" or "BOTH" is chosen the individual's email must be entered.

d. Click **Add Participant** to include the Participant in the grid.

2. If an individual is not listed in the *Participant* drop-down click **Add Team Member**.



a. The *Search Team Members* pop-up will appear. Enter all information known about the individual and click **Search**.

b. The *Search Location* defaults to "ALL" to search all of DHS.

c. Click **Search**.

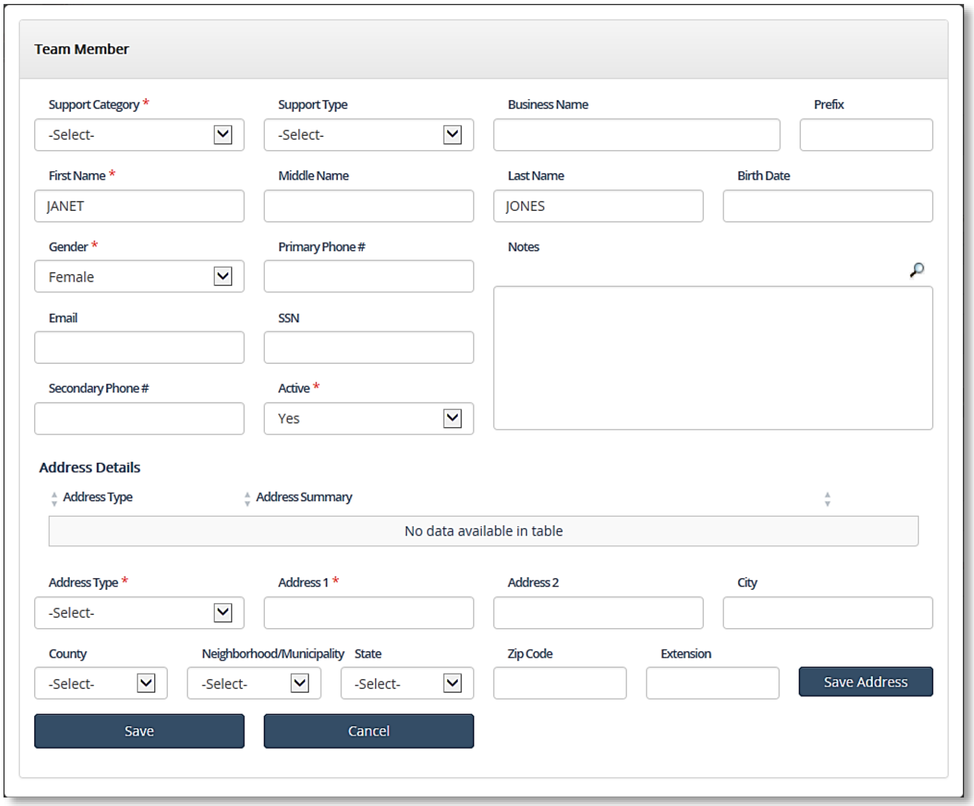
d. Review the *Search Results*. If the individual appears in the *Search Results* click the *Select* radio button to the right of the desired individual and click **Add To Referral**.

e. Clicking **Cancel** will close the *Search Team Members* pop-up without saving a selection.

f. If the individual is not in the *Search Results* click **Create Team Member**.

Important Note: *Creating a New Team Member will also create a new MCI ID for this individual. Please search carefully to ensure that duplicates are not created.*

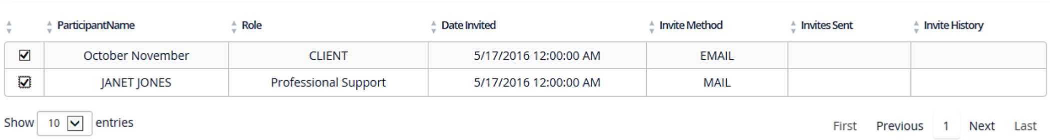
3. Once **Create Team Member** is clicked the *Team Member* pop-up will appear.



a. Enter all of the applicable information for this Team Member (Support) in the *Team Member* pop-up.
   i. The *Support Category* will display in the Participants grid under *Role*.
   ii. The Support can be made Active or Inactive at any time by selecting "Yes" or "No" from the *Active* drop-down. To include this individual in the Meeting, select "Yes".
b. Multiple addresses can be entered for the Team Member under Address Details. A Team Member must have an address to be invited by Mail or Both (Mail and Email).
   i. To include an address, enter the address and select the *Address Type*.
   ii. click **Save Address** to add this address to the *Address Details* grid.
   iii. If an address has been added in error click the delete icon [🗑] to the right of the address in the *Address Details* grid to delete it.

c. To save the Team Member click **Save** .
d. To close the *Team Member* pop-up without saving or making changes to the Team Member click **Cancel**.
e. The new Team Member can now be selected from the *Participants* drop-down and will also appear on the *Team Member* screen.

4. Once all of the Participants have been added select the participants who are to receive an invite by checking the checkbox next to the Participants' names in the grid.



	ParticipantName	Role	Date Invited	Invite Method	Invites Sent	Invite History
☑	October November	CLIENT	5/17/2016 12:00:00 AM	EMAIL		
☑	JANET JONES	Professional Support	5/17/2016 12:00:00 AM	MAIL		

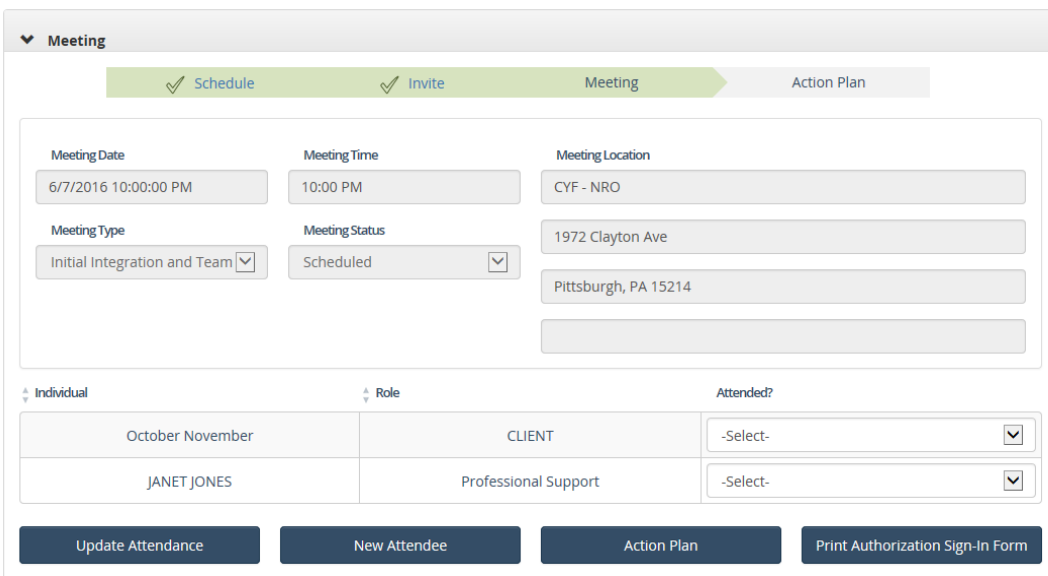
Show 10 entries First Previous 1 Next Last

   a. Click **Send Invitations**. All Invitees with an *Invite Method* of EMAIL or BOTH will receive an email invite. The mail invitations will be sent to Clerical as a PDF attachment via email. Clerical will then mail out the invites.
   b. To print the invitations directly from the *Meetings – Invites* screen click **Print Invitations**. A printable PDF of the invites will be generated.

Meetings – Meeting section

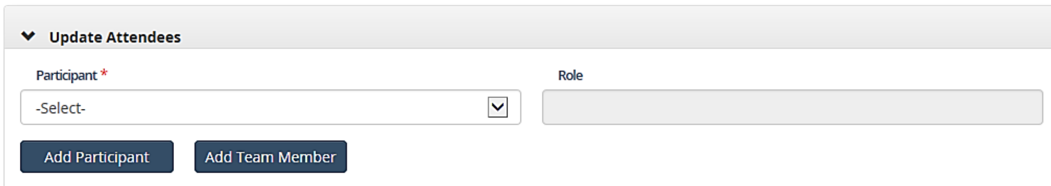
1. To navigate to the Meeting section click on Meeting in the progress ribbon:

2. The Meeting – Meeting section:



   a. Before the meeting generate the Sign-In Form by clicking **Print Authorization Sign-In Form**.
   b. After the meeting document the Attendance by selecting the method of attendance for each individual from the *Attended?* drop-down. Once all Attendance is documented click **Update Attendance**.

c. If an individual who was not originally invited attended click **New Attendee** to include that individual. An **Update Attendees** sub-pane will appear. Select the Participant from the from the *Participant* drop-down. The *Role* will automatically populate based on the information entered for that individual in the Referral.



d. If the individual is not in the *Participant* drop-down click **Add Team Member** to add that individual to the *Participant* drop-down.

> ***Tip:*** *To review how to Add a Team Member see page 5 of this Job Aid.*

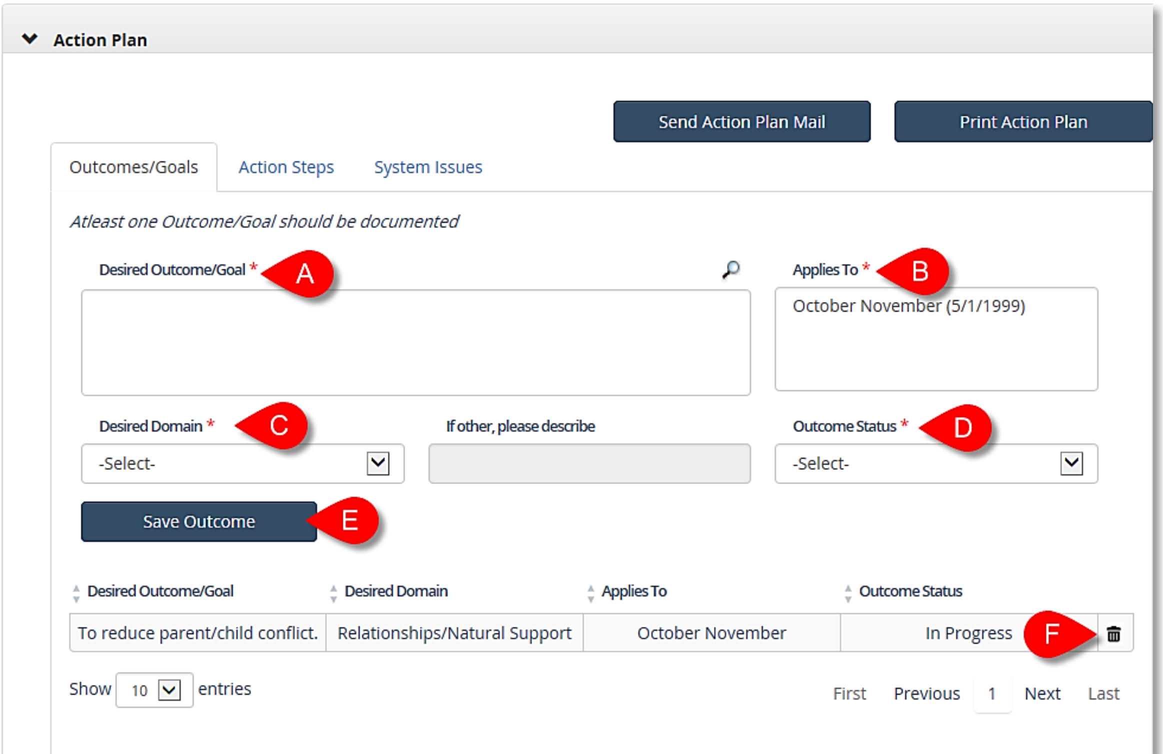
e. After the Participant has been selected from the *Participant* drop-down click **Add Team Member** to include the individual in the grid above.

f. Select the method of attendance for each added individual from the *Attended?* drop-down. Once all Attendance is documented click **Update Attendance**.

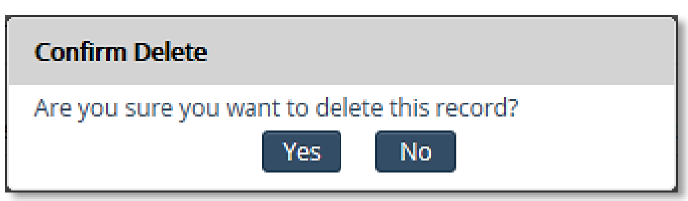
g. Click **Action Plan** to continue on to the *Meeting – Action Plan* section.

Meeting – Action Plan

1. *Outcomes/Goals* tab:

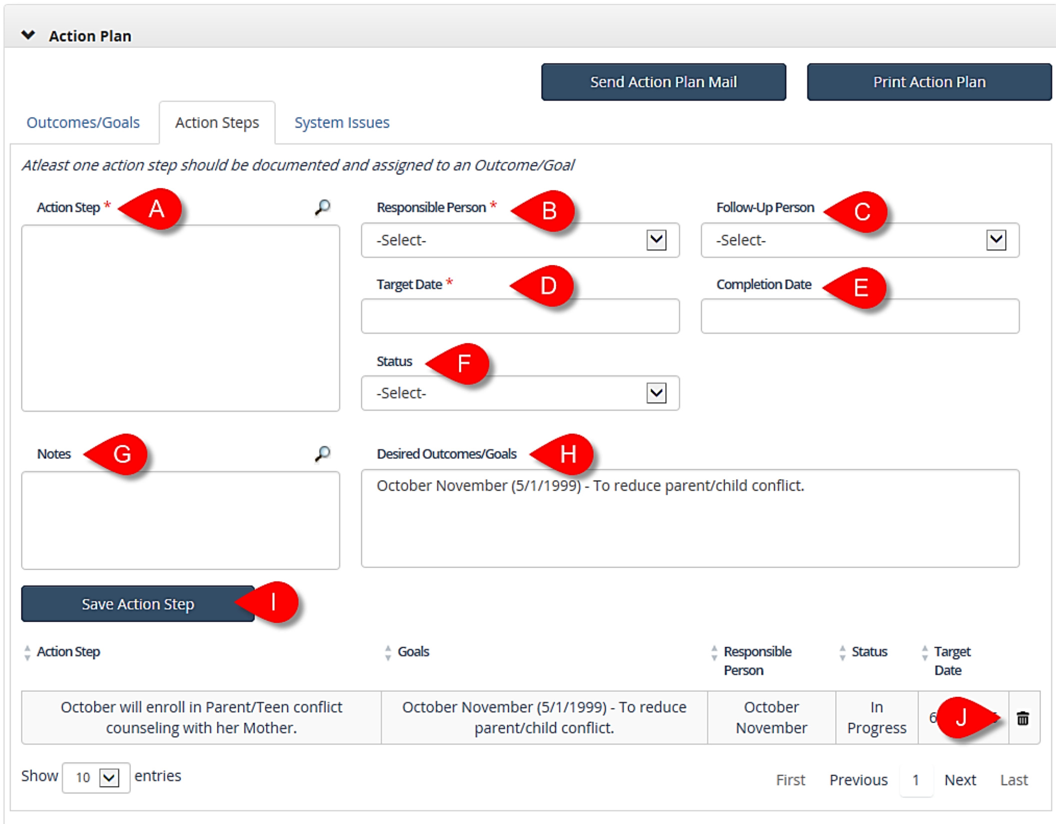


a. *Desired Outcome/Goal*: Enter the Outcome/Goal.
b. *Applies To*: Select the Individual or Individuals the Outcome/Goal applies to from the MultiSelect.
c. *Desired Domain*: Select the associated Domain from the *Desired Domain* drop-down. If "Other" is selected enter the *Domain in the If other, please describe* field.
d. *Outcome Status*: Select the status from the *Outcome Status* drop-down.
e. Click **Save Outcome** to add the Outcome to the grid below.
f. If an Outcome is entered in error it can be deleted by clicking on the delete icon [🗑] to the right of the Outcome in the grid.
   i. A *Delete Confirmation* pop-up will appear: Clicking **Yes** will delete the Outcome. Clicking **No** will cancel the action and the Outcome will not be deleted.



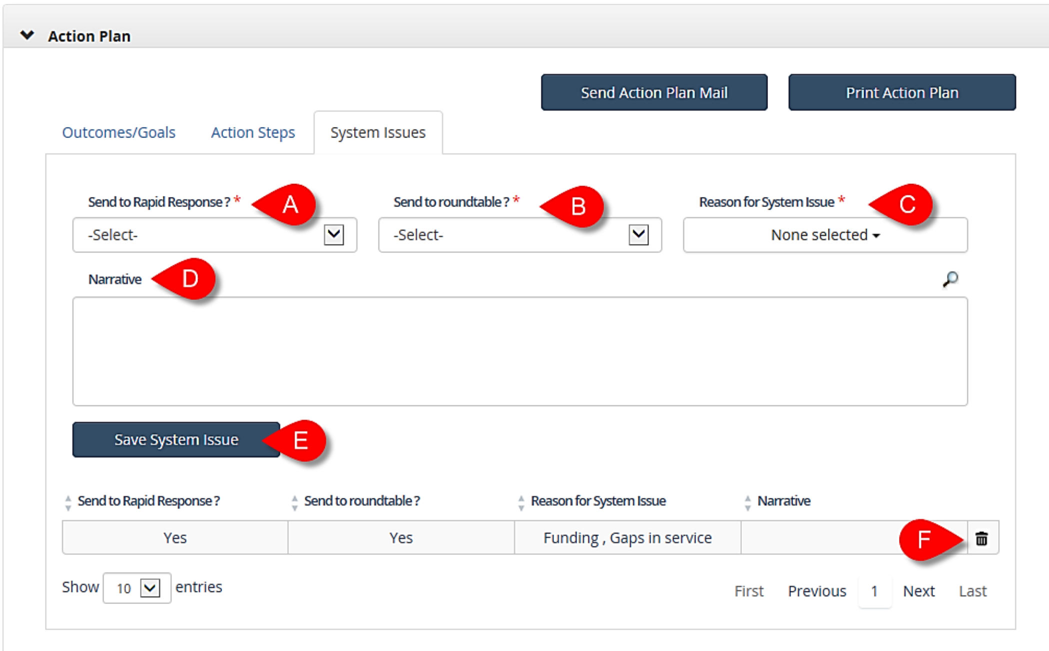
g. Click on the *Action Steps* tab to continue.

2. *Action Steps* tab:

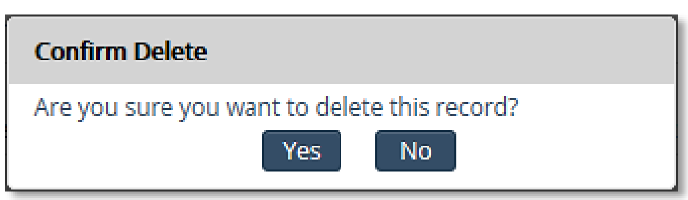


a. *Action Step*: Enter the specific Action Step in the narrative field.
b. *Responsible Person*: Select the person responsible for the Action Step from the drop-down.
c. *Follow-Up Person*: From the drop-down select the Core Team Member who will follow up on the Action Step. The Follow-Up Person will not appear on the printed Action Plan.
d. *Target Date*: Enter the anticipated date of completion.
e. *Completion Date*: Enter the actual completion date (if applicable).
f. *Status*: from the drop-down select the Status of the Action Step.
g. *Notes*: Enter any Notes Applicable to the Action Step. *Notes* will not appear on the printed Action Plan.
h. *Desired Outcomes/Goals*: From the MultiSelect choose all of the Desired Outcomes/Goals that the Action Step applies to.
i. Click **Save Action Step** to add the Action Step to the grid below.
j. If an Action Step is entered in error it can be deleted by clicking on the delete icon [ ] to the right of the Action Step in the grid. **IMPORTANT NOTE:** There is no Delete Confirmation pop-up when deleting an Action Step.
k. Click the *System Issues* tab to continue.

3. *System Issues* tab:



a. *Send to Rapid Response?:* Select Yes or No from the drop-down.
b. *Send to Roundtable?:* Select Yes or No from the drop-down.
c. *Reason for System Issue:* Select all Reasons that apply from the MultiSelect drop-down.
d. *Narrative:* If applicable, enter a Narrative.
e. Click **Save System Issue** to add the System Issue to the grid below.
f. If an System Issue is entered in error it can be deleted by clicking on the delete icon [ ] to the right of the System Issue in the grid.
   i. A *Delete Confirmation* pop-up will appear: Clicking **Yes** will delete the System Issue. Clicking **No** will cancel the action and the System Issue will not be deleted.



Printing and Mailing the Action Plan

1. Click **Send Action Plan**. All Invitees with an *Invite Method* of EMAIL or BOTH will receive an email with a PDF of the Action Plan attached. The Action Plans to be mailed will be sent to Clerical as a PDF attachment via email. Clerical will then mail out the Action Plans.

2. To print the Action Plans directly from the *Meetings – Action Plan* screen click **Print Action Plan**. A printable PDF of the Action Plan will be generated.

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 the Self Service Tool go to http://servicedesk.alleghenycounty.us