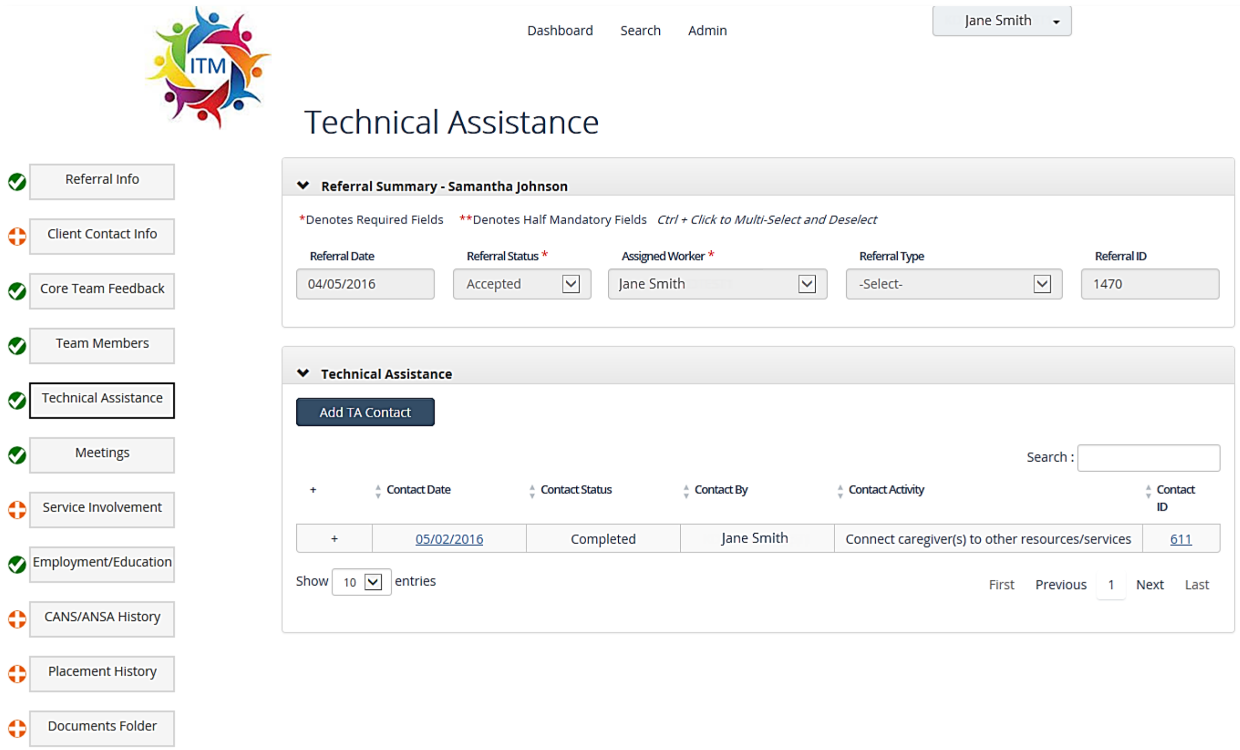
Technical Assistance – ITM Job Aid

The *Technical Assistance* screen is used to view and document the *Technical Assistance Contacts* entered for the specific Referral that is in focus.

Technical Assistance

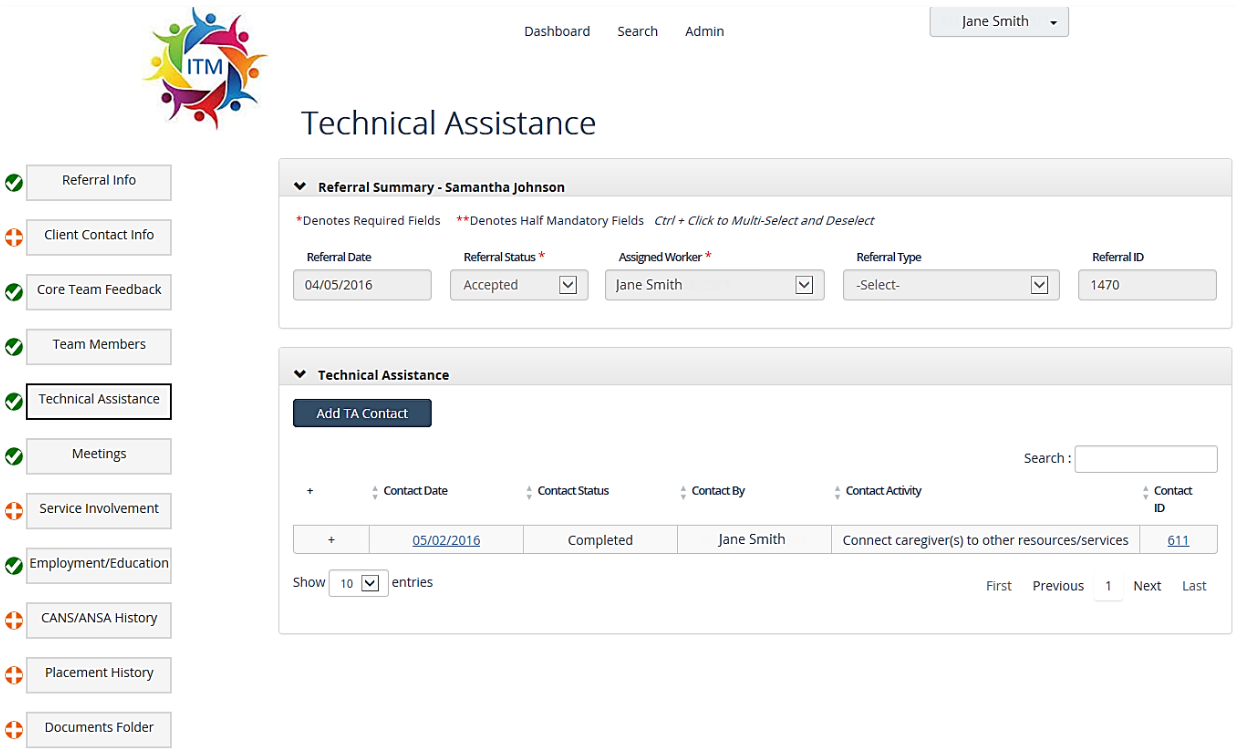


Navigation

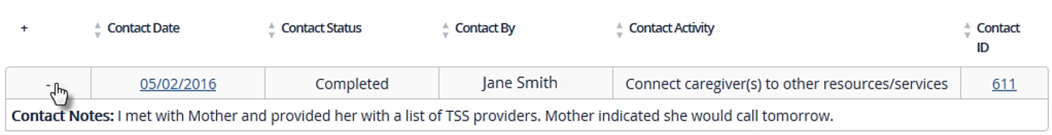
1. From the **Dashboard**: Locate the desired Referral and click on the *Referral ID* to bring the Referral into focus.
   a. Click on the **Technical Assistance** tile.

> ***Tip:*** *Technical Assistance Requested (yes/no?) can be documented for each Core Team Member by the Admins in the Core Team pane on the Referral Info screen. Core Team Members will receive an email notification of the Technical Assistance Request.*

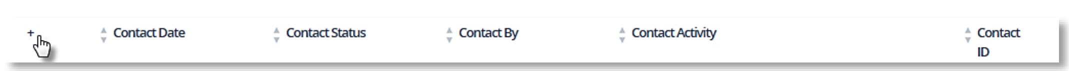
Technical Assistance screen



1. Using the *Technical Assistance* screen:
   a. To create a new *Technical Assistance Contact* click **Add TA Contact**.
   b. To View or update an existing Contact click on the *Contact Date* or *Contact ID* of the desired Contact in the **Technical Assistance** pane.
   c. To View the *Contact Notes* without opening the Contact click on the [**+**] to the left of the Contact in the grid. To close the *Contact Notes* view click on the [**-**] that now appears to the left of that Contact in the grid.

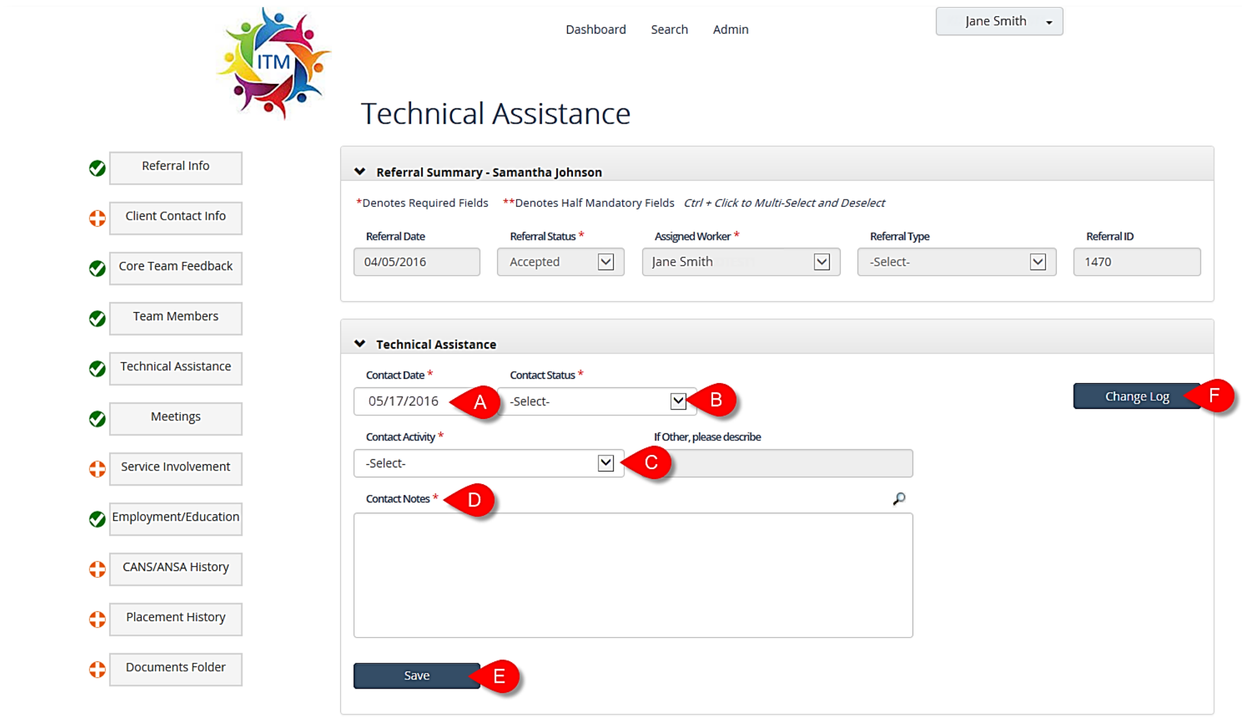


   d. To view the *Contact Notes* for all of the Contacts in the current page of the grid click on the [**+**] above the grid. To collapse all of the Contact Notes click on the [**-**] that now appears above the grid.

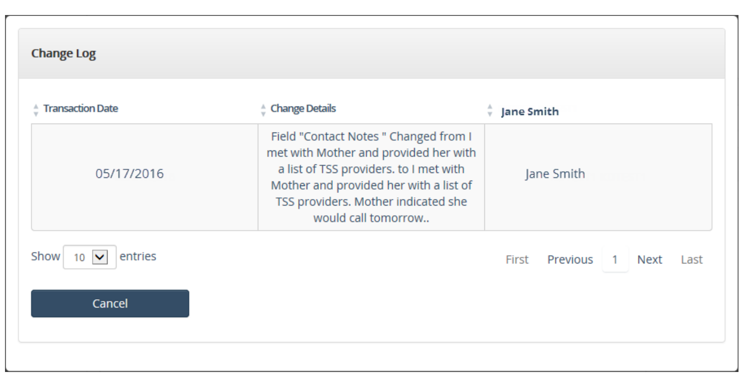


2. The **Technical Assistance** tile status indicator will display as ✚ until the first *Technical Assistance Contact* has been entered. Then the status indicator will change to ✔.

Documenting a Technical Assistance Contact



1. After clicking **Add TA Contact** the **Technical Assistance** pane will display a blank *Technical Assistance Contact*.
   a. Enter the *Contact Date*. Note that the date will default to today's date.
   b. Select the *Contact Status*.
   c. Select the *Contact Activity*. When "Other" is selected the *If Other, Please Describe* field becomes mandatory. Type the Contact Activity in this field.
   d. Enter the *Contact Notes*.
   e. Click **Save** to save the information entered.
   f. Clicking the **Change Log** will open the *Change Log* pop-up. If changes were made to the Contact after the contact was initially saved those changes will be documented here. Click **Cancel** to close the *Change Log* pop-up.



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