

# **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.

ITM		Dashboard	Search Admin		Jane Smith 👻	
	Technical	Assistance				
Referral Info	◆ Referral Summary -	Samantha Johnson				
Client Contact Info	*Denotes Required Fields	**Denotes Half Mandato	ry Fields Ctrl + Click to Multi-Se	elect and Deselect		
	Referral Date	Referral Status *	Assigned Worker *	Referral Type	Ref	erral ID
Core Team Feedback	04/05/2016	Accepted 🗸	Jane Smith	-Select-	▶ 147	70
Team Members	<b>** *</b> - <b>b : :</b> - <b>1 *</b> - <b>: : *</b> - <b>:</b>	_				
Technical Assistance	Add TA Contact	-				
Meetings					Search :	
Service Involvement	+ 🖕 Contact Date	e 🙏 Contact Stat	us 🙏 Contact By	$\frac{A}{\psi}$ Contact Activity		÷ Contact
Employment/Education	+ 05/02	<u>//2016</u> Com	pleted Jane Smit	h Connect careg	iver(s) to other resources/servi	ces <u>611</u>
	Show 10 🔽 entries				First Previous 1	Next Last
Employment/Education						
CANS/ANSA History						

## 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.





#### Technical Assistance screen

ITM		Dashboard Search	Admin	Jane Smi	ith -
•	Technical Assi	stance			
Referral Info	♥ Referral Summary - Samanth	ia Johnson			
Client Contact Info	*Denotes Required Fields **Deno	tes Half Mandatory Fields Ct	trl + Click to Multi-Select and	Deselect	
	Referral Date Referra	I Status * Assigned	Worker *	Referral Type	Referral ID
Core Team Feedback	04/05/2016 Accep	ted 🔽 Jane Sm	ith 🔽	-Select-	1470
Team Members Technical Assistance	✓ Technical Assistance Add TA Contact				
Meetings					Search :
Service Involvement	+ Å Contact Date	$\frac{A}{V}$ Contact Status	A Contact By	Contact Activity	↓ Contact ID
Employment/Education	+ 05/02/2016	Completed	Jane Smith	Connect caregiver(s) to other	resources/services <u>611</u>
CANS/ANSA History	Show 10 💌 entries			First	Previous 1 Next Last
Placement History					
Documents Folder					

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.

+	$\frac{\lambda}{\gamma}$ Contact Date	Contact Status	$\frac{A}{V}$ Contact By	A v Contact Activity	Contact ID
-նող	05/02/2016	Completed	Jane Smith	Connect caregiver(s) to other resources/services	<u>611</u>
Contact No	tes: I met with Mother and	l provided her with a list o	f TSS providers. Mother inc	dicated she would call tomorrow.	

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.

t,	🖕 Contact Date	$\frac{\mathbb{A}}{\mathbb{V}}$ Contact Status	🖕 Contact By	$_{_{\nabla}}^{_{\mathbb{A}}}$ Contact Activity	∛ Contact ID

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



#### Documenting a Technical Assistance Contact

	Tachnical	Accistance					
	Technical	ASSISTATICE					
Referral Info	◆ Referral Summary -	Samantha Johnson					
Client Contact Info	*Denotes Required Fields	**Denotes Half Mandato	ory Fields Ctrl + Click to Multi	-Select and De	eselect		
	Referral Date	Referral Status *	Assigned Worker *		Referral Type		Referral ID
Core Team Feedback	04/05/2016	Accepted 🔽	Jane Smith	$\checkmark$	-Select-	$\checkmark$	1470
Team Members							
	♥ Technical Assistance						
Technical Assistance	Contact Date *	Contact Status *					
Meetings	05/17/2016 A	-Select-	B				Change Lo
V Meetings	Contact Activity *	r	If Other, please describe				
Service Involvement	-Select-		C				
	Contact Notes *	)			٩		
Employment/Education							
CANS/ANSA History							
•							
Placement History							

Add TA Contact the Technical Assistance 1. After clicking 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.
- Save e. Click to save the information entered.
- Change Log will open the *Change Log* pop-up. If changes were made to f. Clicking the the Contact after the contact was initially saved those changes will be documented here. Cancel Click

to close the Change Log pop-up.

Transaction Date	🖕 Change Details	🖞 Jane Smith
05/17/2016	Field "Contact Notes" Changed from 1 met with Mother and provided her with a list of TSS providers. to 1 met with Mother and provided her with a list of TSS providers. Mother indicated she would call tomorrow.	Jane Smith
how 10 🖌 entries		First Previous 1 Next La





### 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 the Self Service Tool go to <a href="http://servicedesk.alleghenycounty.us">http://servicedesk.alleghenycounty.us</a>