



Jail Collaborative–External- Summary / Closing an Intake

Once an Intake and Service record is created for a Jail Client, summary information can be viewed on the *Summary* screen. The Jail Collaborative Provider must close the Intake when the client is no longer receiving services. This Job Aid outlines the steps to review the *Summary* screen and *Close an Intake* for a Jail Collaborative Client.

Reviewing the Summary screen

The screenshot shows the 'Summary' screen of the Jail Collaborative system. The header includes the Allegheny County Department of Human Services logo and name. The navigation bar has tabs for 'Jail Collab.', 'Admin', 'Help', 'Logout', and a 'Case' dropdown. The left sidebar contains an 'Organizer' with 'In Focus', 'Focus', and 'History' tabs, and a 'User Name' field. The main content area is titled 'Summary' and includes a legend: '* Denotes Required Fields ** Denotes Half-Mandatory Fields'. The 'Assignment' section features a table with columns: Unit, Assigned Staff, Type, Start Date, and End Date. The 'Program Status' section has a table with columns: Program Status, Start Date, and End Date, and buttons for 'New', 'Save', and 'Delete'. Below this is a form with 'Program Status*', 'Start Date*', and 'End Date' fields. The 'Intake History' section has a table with columns: Date of Intake, Sentenced, Intake Source, Provider Name, Close Date, and Submitted. Below this is a form with 'Out-of-County Detainer*', 'Risk Level*', 'Assessment Date', 'Assessment Score', 'DOC#*', and 'Booking ID' fields. The 'Jail Client' section has a 'Sentenced' checkbox and a table with columns: Minimum Date, Maximum Date, Offender Tracking No., Release Date, and Description. At the bottom, there is a 'Recommend Closure' section with 'Reason' and 'Date' fields, a 'Closure Summary' text area, and buttons for 'New Intake', 'Save', 'Show', 'Close Intake', and 'Cancel'.

1. Bring the Jail Client into focus.
 - a. **Jail Collab. > Summary**
2. The *Assignment* grid shows a history of assignments.

3. The *Program Status* grid displays the status of the client.
 - a. Click the **[New]** button on the right of the grid to create a new *Program Status*.
 - i. *TIP: There can be more than one active Program Status at any given time.*
 - b. Select the *Program Status*.
 - c. Enter the *Start Date*.
 - d. If applicable, enter the *End Date*.
 - e. Click the **[Save]** button on the right of the grid to save the entry.
 - f. To delete an entry, select the row and click the **[Delete]** button to the right of the grid.
4. The *Intake History* grid lists of all the Intake records that have been opened for this Jail Client. Select the Provider created Intake record.
5. Click **[Save]** to save changes made to the *Summary* screen.
6. Click **[Show]** to view the *Provider Intake Info* screen.
7. The **[New Intake]** button is disabled for Jail Collaborative Providers until the current intake is closed.

Closing an Intake

NOTE: Before closing an Intake, all Services must be ended

- i. *TIP: A Jail Collaborative Provider can close only Intake records created by their agency.*

1. Bring the Jail Client into focus.
2. Navigate to the *Summary* screen.
 - a. Jail Collab. > Summary
3. Scroll down to the last section on the screen and click the *Recommend Closure* box.
4. Select the *Reason for closure*.
5. Enter the *Date* to indicate the date of closing.
6. Enter narrative comments in the *Closure Summary* box.
7. Click **[Save]**.
8. Click **[Close Intake]**.
 - i. *TIP: If there are any open services for this Jail Client, a reminder to close the services is displayed. The services must be ended prior to closing an intake.*
9. A closure confirmation message is displayed. Click **[Yes]** to complete the Intake Closure and remove the pop-up.
 - i. *TIP: The **[New Intake]** button is enabled after the current Provider Intake has been closed.*

For more information...

For assistance, please contact the Allegheny County Service Desk at servicedesk@alleghenycounty.us or 412-350-4357 (Option 2 for DHS). To access the Self Service Tool go to <http://servicedesk.alleghenycounty.us>.

This Job Aid and additional user materials are located on the DHS Amazon site at <http://dhswebt.s3.amazonaws.com/KIDSJobAids/index.html>.