Jail Collaborative
ALLEGHENY COUNTY

JAIL COLLABORATIVE PROVIDER USER GUIDE

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Introduction

What is Jail Collaborative?

Jail Collaborative is the repository of record for complete, real-time service information for all Jail Collaborative Clients. It is used to capture information for services rendered, goals and their outcomes for these Jail Clients.

How will I use the Application? - Overview

There are 2 groups using the Jail Collaborative Application: Internal users (Jail, Re-entry, Probation, Courts) and Providers. Internal Users are responsible for Jail Clients in the Jail Collaborative application and request the services to be provided for the Jail Collaborative Clients. As a provider, you receive these **requests to provide services** to Jail Collaborative Clients and you choose whether or not to provide these services. If you choose to provide services to these Jail Clients, you gain access to the Jail Client in the Jail Collaborative application.

Once a Jail Client is receiving services from your organization, you are expected to **complete Supplemental Intake Forms** to document additional information about this Jail Client. In addition, you are able to **update other Jail Client specific information**, such as employment and contact information.

The primary role of the provider is to **document outcomes** in the *Goals and Outcomes* screens for the services you are providing to Jail Clients. You can continue to update screens at any time while you are providing services to a Jail Client.

While working with a Jail Client, you may feel the individual would benefit from another service. You are able to **refer Jail Clients for additional services.** This request is sent to the Internal user responsible for the Jail Client, and who ultimately decides whether or not to accept the request and select the provider.

Once you have completed providing services for a Jail Client, you are expected to **end the service** in the application. At this point, you lose access to this Jail Client in the application.

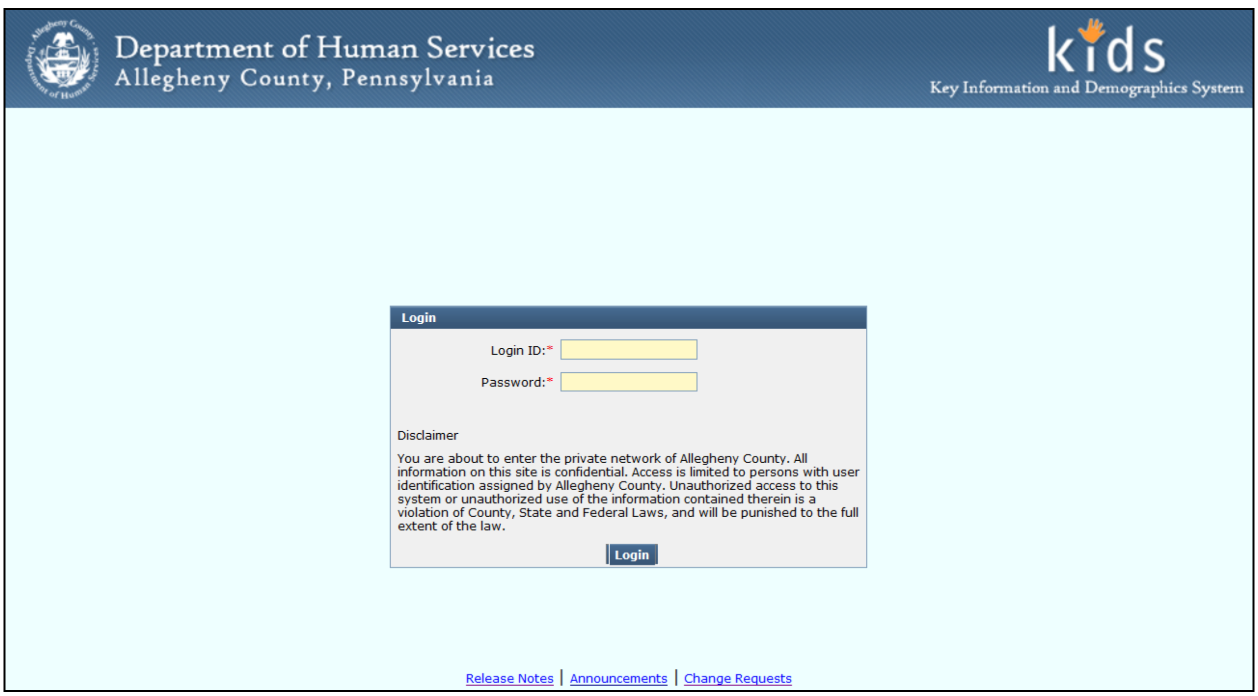
Navigating & Common Screen Elements

Logging into the Application

- Click the KIDS icon on your desktop 

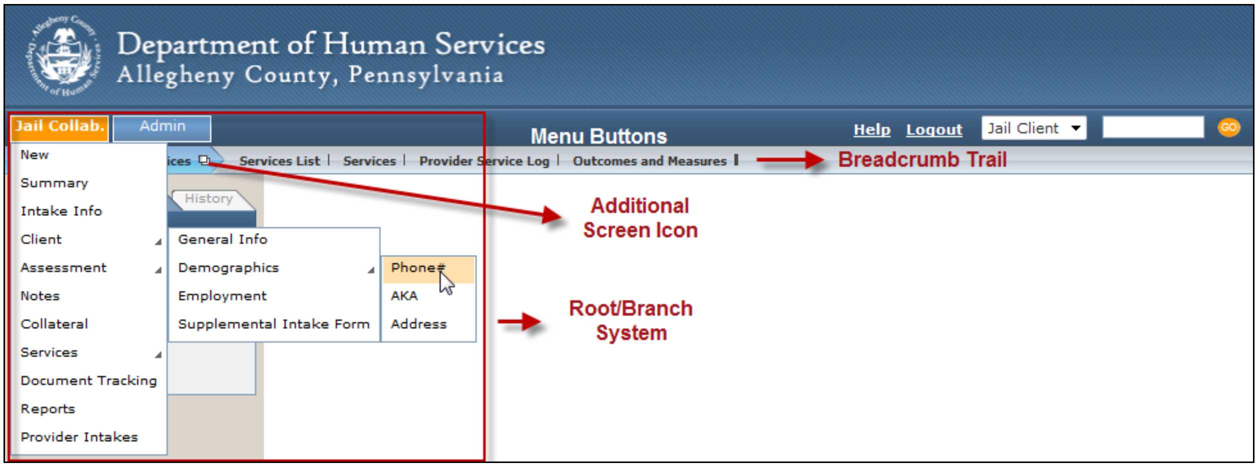
- *OR* navigate to the URL: https://kids.county.allegheny.pa.us/kids.
- To access the application, log in using your Login ID and Password.
    - The Release Notes link displays the Release Notes for the latest maintenance build that was implemented.
    - The Announcements link will display a schedule of any maintenance windows planned for the application.
    - The Change Request link displays a listing of Change Requests and their prioritization.
- Then click the **[Login]** button.

    TIP: Pop-up blocker must be turned off for the application to open.



Key Elements of the Application

Menu Buttons and Root/Branch System



- The Root/Branch system goes out to the leaf level.
- Names in screens in bold text can be navigated to.
  - Screen names in light text cannot be viewed. An action must happen before this screen can be viewed.
  - Hover on menu buttons to expand menus. Be sure to navigate straight down and straight across.
- Click when the desired screen is highlighted in the expanded menu.
- Black corner triangle [◢] indicates there are additional screens in the menu.
  - If the menu item does not have the icon, then there is only one screen.

Breadcrumb Trail

- Another way to navigate in the application.
- Displayed when one of the menu buttons is selected.
- Displayed once an entity is in focus. This displays one level of the menu.
- This toolbar changes depending on where you are in the application.
  - **Blue** shows the root pages.
  - **Orange** shows current location in the application.
  - **Gray** shows additional screens.

- The Additional Screen icon is a small square icon found on certain breadcrumb toolbar buttons.

- If a toolbar button does not have an icon, it means that there is only one screen associated with that button and there are no additional screens at a lower level. The screen clicked will display.

Left Navigation Bar

- The left *Navigation Bar* is used to assist with your day to day activities in the application.
- This feature is always displayed.
- There are 3 tabs that function like folders.
  - **Organizer** tab
  - **Focus** tab
  - **History** tab
- Click on the [+] sign to expand and [-] to collapse lists.

Organizer Tab

The **Organizer tab** is a tool used to display responsibilities for the active user.

- **Workload:**
  - My Active Services
    - Displays active clients for Jail Collaborative (and any placement and non-placement services).
- **My Calendar:**
  - Used to show when tasks are due.
  - Alerts can be auto generated or entered manually.
- **My Tasks:**
  - My Request
    - Awaiting Action – items submitted for Supervisor approval.
    - Denied – items for which approval has been denied.
    - Recently Approved – items which received supervisor approval in the last 30 days.
    - Returned – items the Supervisor sent back for editing.
  - My Approval Inbox
    - Awaiting Action
  - My Alerts
  - Waitlist:
    - Displays Jail Clients awaiting approval of services.

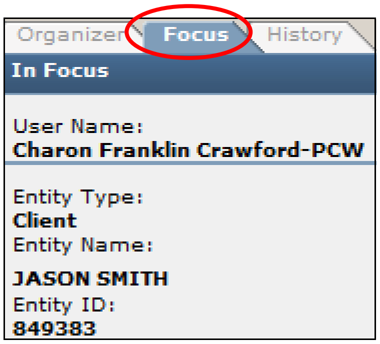
My Active Services

- On the **Organizer** tab in the **Workload** section, click on *My Active Services*.
- Once the **My Services** screen appears, click on the *Jail Services* tab.

- Review the grid and highlight the Jail Client and service episode of interest, click **[Show]**. This will bring that Jail Client and service episode into focus.

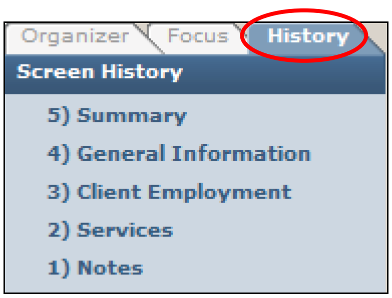
TIP: If more than one service episode exists for a Jail Client, review the information in the Posting Detail section to ensure you are selecting the right service episode.

Focus Tab



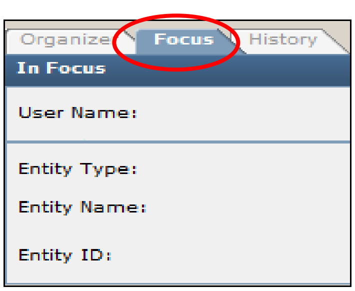
- The **Focus** tab displays the active Jail Collaborative Client.
  - Only one Jail Client can be in focus at a time.

History Tab



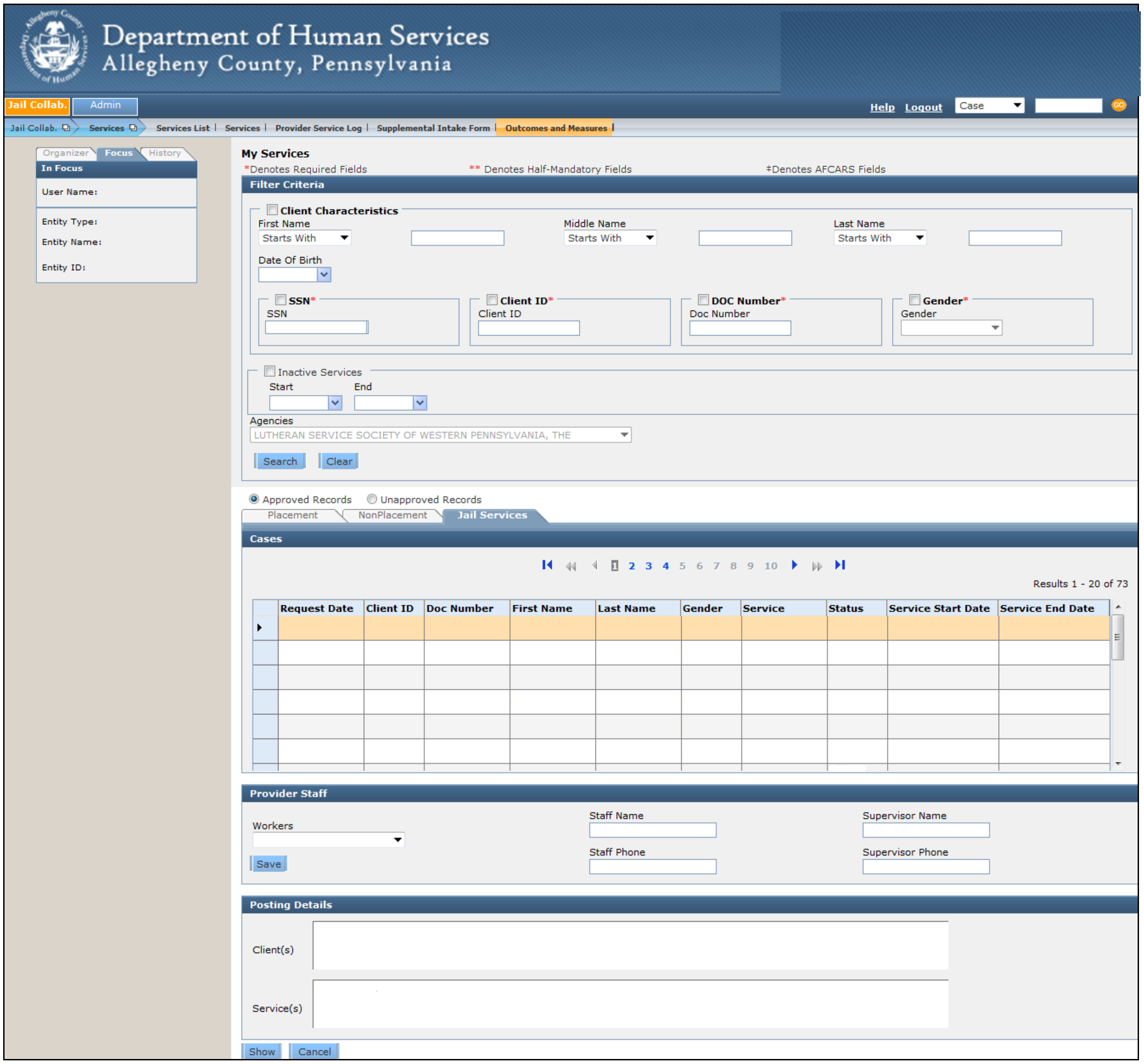
- **The History** tab lists the last 5 screens viewed during your current session.

Bringing an Entity into Focus



- Provides the means to update or view Jail Client information.
- Any screen viewed is for the Jail Client in focus.
- Always make sure the desired Jail Client is in focus.

Searching a Client



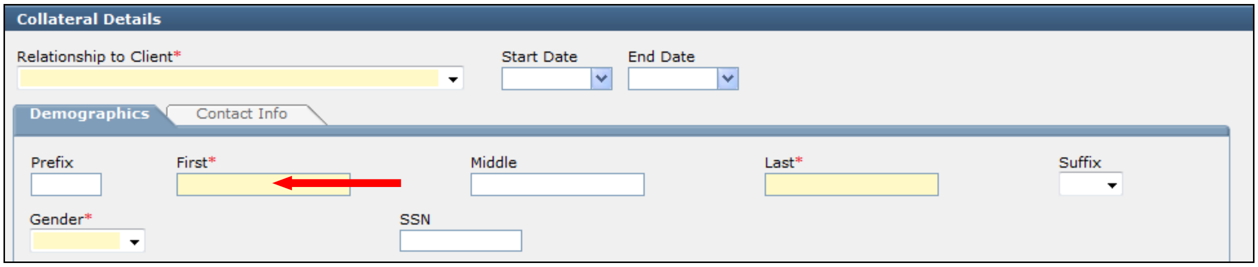
- From the Organizer tab, click **My Active Services** to navigate to the *My Services* screen.
- Enter the Jail Client information and click **[Search]**.
  - Completing fewer filter fields yields broader search results.
- Review the results and highlight the Jail Client of interest from the grid, click **[Show]**.
  - Only Jail Clients are returned in the search.

Quick Search

- Select *Jail Client* from the dropdown.
- Enter the Jail Collaborative Client ID Number and click .
- Your Entity will be in focus.
- Only numerical characters can be used.

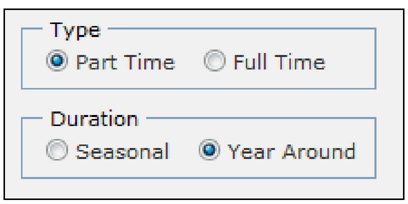
Common Screen Elements

Field



- A field is an area where data can be entered.
- Limited in size.
- Mandatory fields are yellow and marked with a red asterisk.

Radio Button

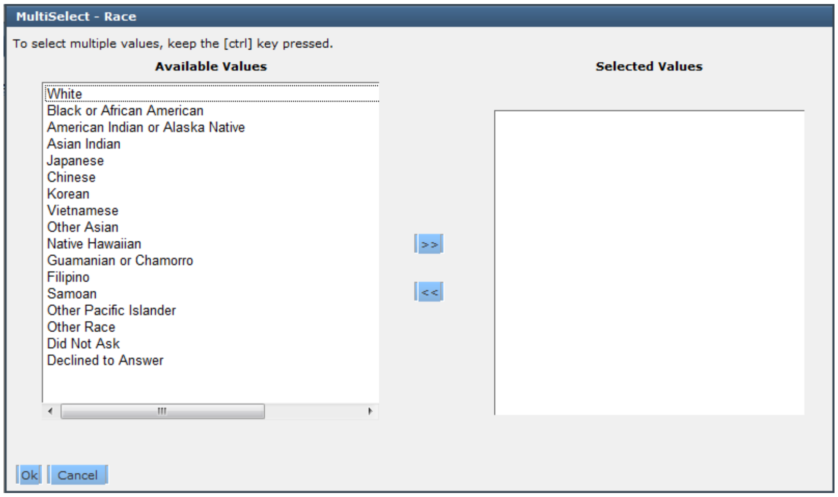


- Radio buttons are found next to certain fields in the application.
- Once selected the radio button turns blue.
- Only one radio button can be selected within a group.

Check Box

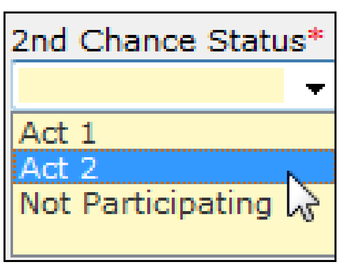
- Select and deselect by clicking inside the box.
- Multiple boxes can be selected at the same time.

Multi Select Box



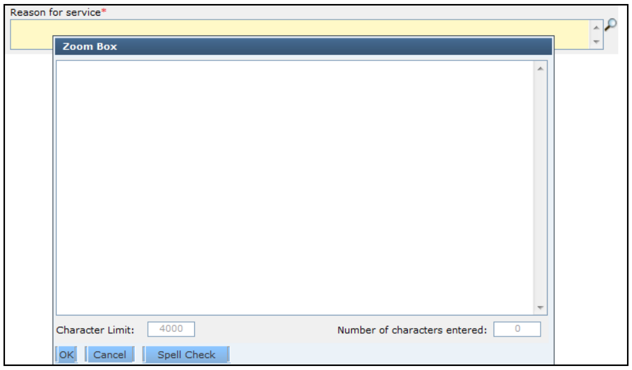
- Click the **[Select]** button located beneath the field to open the corresponding **Multi-Select** pop-up.
- The pop-up contains a list of predefined selections.
  - Highlight selection(s) and use middle buttons **[>>]** to move values from *Available Values* to *Selected Values*.
  - To add more than one value at a time, hold the **[CTRL]** button on your keyboard while selecting all applicable values.
  - Use the **[<<]** button to return *Selected Values* to *Available Values*.
- Click the **[OK]** button to close the pop-up and the *Selected Values* display in the corresponding field.

Drop-Down List



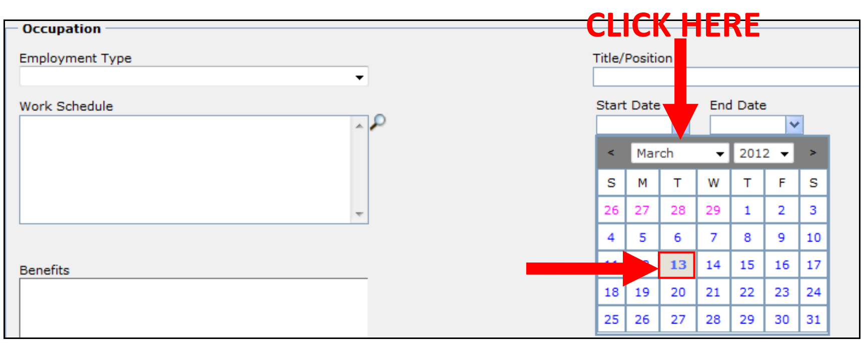
- A drop-down list is a field with predefined selections.
  - Only one selection can be made from the list.
- To display the list, click on the arrow on the right of the field.
  - Click on the desired selection; that selection displays in the field.

Narrative Text Field / Zoom Box



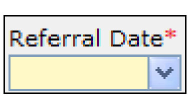
- Click in the field and type narrative text.
- Click on the Magnifying Glass icon to the right of the field to open the Zoom Box.
- Use the Spell Check feature in the Zoom Box by clicking on the **[Spell Check]** button.
- Character Limit is displayed along with the number of characters used.

Date Field



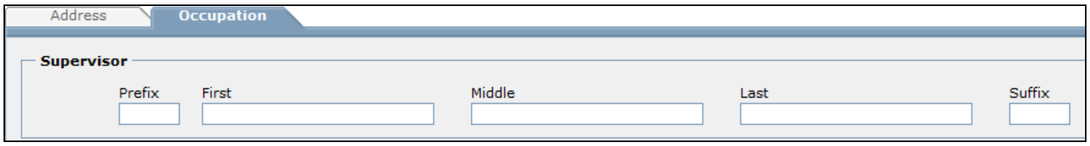
- Click on the drop arrow to open the calendar window.
- Select the month, year and then day.
- The selected date populates into the field.
- The date can be typed in the field in MM/DD/YYYY format.

Required Fields

	• Some fields must be completed before the screen can be saved. These fields are indicated with yellow shading and * (red asterisk). • All fields are expected to be completed if the information is known

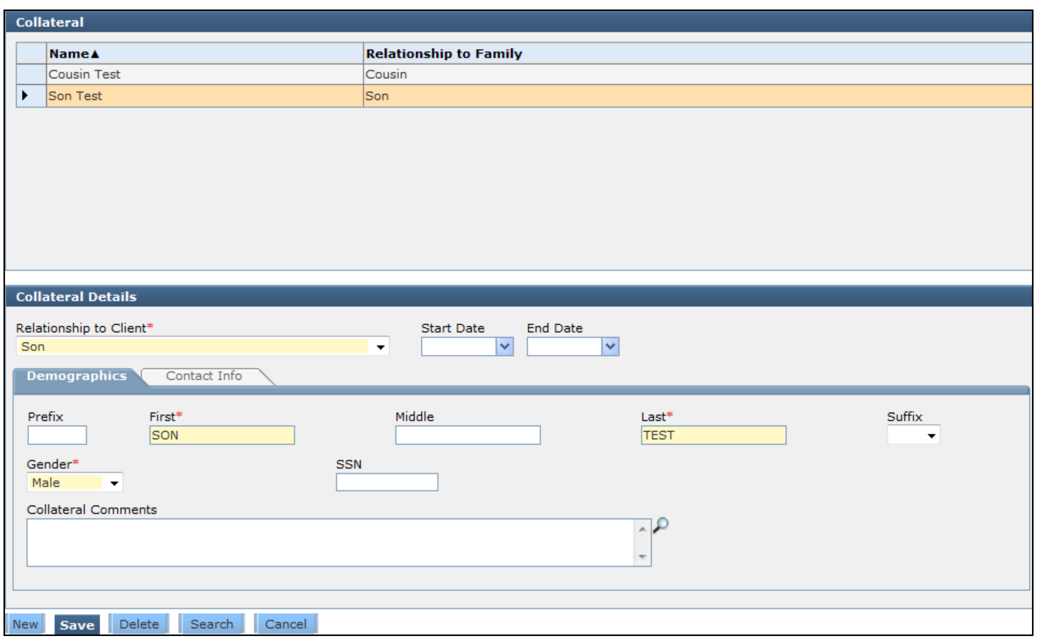
Tabs

- Tabs show there are multiple screen layers on top of each other.
  - These are accessed by clicking on the desired tab to bring information to the top of the stack.
- The tab selected and currently displayed is highlighted in blue.

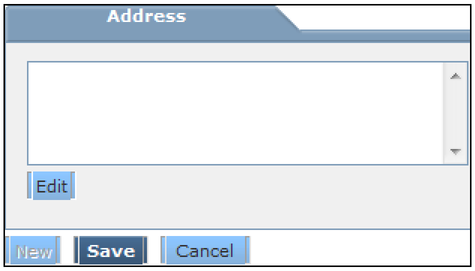


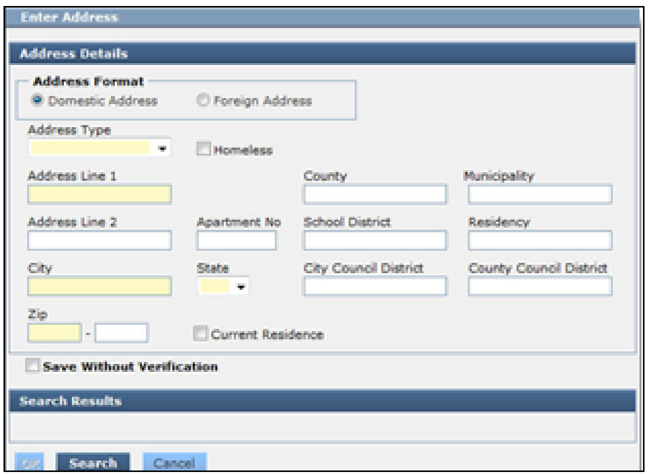
Grid

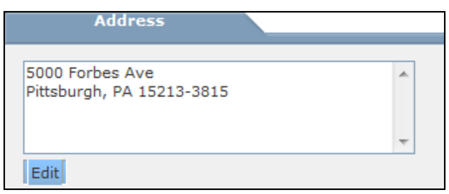
- Grids are built based on the fields completed on the screen.
- If no information is currently in the grid, the fields below will be empty. The grid populates upon saving the applicable fields.
- If there is information already in the grid, the fields below populate with the information from the entry highlighted. To add a new entry, click the **[New]** button. Complete the applicable fields and click the **[Save]** button**.**



Address *Box*







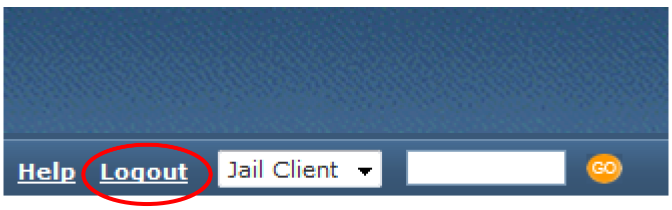
- Click the **[Edit]** button to enter the address.
- The *Enter Address* pop-up displays.
- Select the *Address* type and complete the applicable fields.
  - There can only be one address for each *Address* type.
- Click **[Search]** to validate the address. The application validates the address against Postal records.
  - If the address is validated, a message indicating same is displayed. Click the **[OK]** button to close the window.
  - If an alternate address is found, select the appropriate address in the *Search Results* grid. Click the **[OK]** button to close the window.
  - If the address is correct but does not validate, click the *Save Without Verification* check box. Click the **[OK]** button to close the window.
- Once an address is selected and you click **[OK]**, the address populates the field.

Timing Out

- After 80 minutes of inactivity in the application, the application will time out.
- If the session has timed out, any unsaved information will be lost.
- **Save frequently.**

Logging out of the Application

- To log out, click the Logout link in the upper-right corner of the screen.
- Make sure you have saved everything you are working on before clicking the Logout link.



Services Waitlist Screen

Screens and Navigation Path

Screen	Navigation Path
Left Navigation Bar	Organizer Tab > Waitlist

Highlights & Tips

General Information

- This screen displays Jail Clients referred to a Provider for services by a Jail user, scheduling of services, separations and approvals.
- The *Waitlist* screen consists of three tabs – *Waitlist, Response* and *Alternative Housing Pre-Screen*.
  - The *Waitlist* tab displays open referrals for services awaiting scheduling.
    - Select a service from the *Services* grid. The *Services* grid lists Provider's specific services.
      TIP: Providers are able to view only potential Jail Clients referred for their services.
      TIP: The Client listing is read only for Jail users.
    - Enter services time and date at bottom of the screen. Once saved, the Jail Client information moves to the *Response* tab.
  - The *Response* tab displays referrals pending separations and approvals, and those previously approved by the Jail user. This screen is read only to Providers.
    - Not all referrals required approval. Those services requiring approval include:
      - Domestic Abuse Counseling
      - Education
      - Employment and Training
      - Family Support
      - Pre-Natal
      - Drug and Alcohol
      - Cognitive Behavioral Treatment
    - If the Jail Client is not included due to separations, the referral goes back to Provider's Waitlist for further action.
  - The *Alternative Housing Pre-Screen* is exclusive to Providers offering Alternative Housing services.
    - This screen is read only and provides a link to the *Provider Recommendation* tab in the *Alternative Housing Services* screen.

****See Job Aid "Services Waitlist Screen" for detailed instructions on how to complete this screen.***

****See Job Aid "Alternative Housing Services Screen" for detailed instructions on how to complete the Provider Recommendation screen.***

Receiving Service Requests

Screens and Navigation Path

Screen	Navigation Path
Left Navigation Bar	Organizer Tab > My Active Services

Highlights & Tips

General Information

- Once a service is approved by a Jail user, the Provider can view the status of the service by Navigating to the **My Active Services** option on the left navigation bar. Click on **My Active Services** to open the *My Services* screen. The screen defaults to the *Jail Services* tab.
- Select the Jail Client and service episode to review *Posting Details*. Locate desired Jail Client and click **[Show]**.
    - The *Services* screen displays with details of the service request and brings the Jail Client into focus.
        - If you agree to provide services, no action needs to be taken to approve the service.
        - If you choose not to provide the service, check the *Unable to provide services* box. This ends the request and removes the client from the **My Active Services** list.

End a Service Episode

Screens and Navigation Path

Screen	Navigation Path
Service List	Jail Collab. > Services > Service List
Service	Jail Collab. > Services > Service

Highlights & Tips

- The *Service List* screen displays a history of the services the Jail Client has been referred to.
    - Highlight the Service Episode to end and click **[Show].**
    - Complete the screen by entering the closing information.
        - Once saved, the Service Episode ends and access to this Client is not available.

****See Job Aid "End a Service Episode" for detailed instructions on how to complete this screen.***

Updating Client Information

Screens and Navigation Path

Screen	Navigation Path
General Info	Jail Collab. > Client > General Info
Phone Number	Jail Collab.> Client > Demographics > Phone #
AKA	Jail Collab.> Client > Demographics > AKA
Address	Jail Collab.> Client > Demographics > Address
Employment	Jail Collab.> Client > Employment

Highlights & Tips

General Information

- Fields on this screen populate with the information provided during Intake.

TIP: This screen is not editable. The remaining Client Information screens can be updated by Providers.

Phone Number

- Enter all phone numbers known for the Jail Client. If the Jail Client is best reached at a certain number, include that information in the *Description* field. Click **[Save]**.

AKA

- If the Jail Client is known by any other names, include this information in the *AKA* screen. Click **[Save]**.
- Only one of each of type of alias can be entered.

Address

- Click **[New]** to add a new address.
  - If the correct address does not come up in the search results, check the box next to **Save Without Verification** and press **[OK].**

TIP: Refer to Address section of User Guide for information on adding addresses.

Employment

- The *Client Employment* grid shows a history of the Jail Client's employment information. To add a new employment record, click **[New].** Enter all known information and click **[Save].**

****See Job Aid "Adding Employment Information" for detailed instructions on how to complete this screen.***

Adding Collateral

Screens and Navigation Path

Screen	Navigation Path
Collateral/Significant Other Information	Jail Collab. > Collateral

Highlights & Tips

- Collaterals can be entered and updated by both Providers and Jail users.
- A collateral with a valid email address included will be able to receive Notes.
    - To send a note to a collateral they must have a valid email address and be active.

****See Job Aid "Adding Collateral" for detailed instructions on how to complete this screen.***

Adding Notes

Screens and Navigation Path

Screen	Navigation Path
Notes	Jail Collab. > Notes

Highlights & Tips

- All existing notes display in the *Notes History* grid at the top of the screen.
    - Active Collateral/Participants with valid email addresses included can be sent an email copy of the note. This is documented in the N*otification Sent* portion of the *Note History* grid.
    - Only *included* Collateral active on the day the note is created and have a valid email address can be sent a note. The collateral is considered active if no *End Date* has been entered for that collateral.
- Once a note is saved, it cannot be updated.
    - To view a previously written note, highlight the note of interest. The *General Information* and *Notification Participants* fields populate with information from that note.

****See Job Aid "Adding Notes" for detailed instructions on how to complete this screen.***

Supplemental Intake Form

Screens and Navigation Path

Screen	Navigation Path
Supplemental Intake Form	Jail Collab. > Services > Supplemental Intake Form

Highlights & Tips

- Internal users complete Jail Client information screens. As a Provider with close access to the Jail Client, there is additional information you may obtain. Such information is documented on the *Supplemental Intake Form*.
- You can view *Supplemental Intake Forms* completed by other providers for this Jail Client.
- To view these, navigate to **Jail Collab. > Services List**. Select any of the services the Jail Client is receiving or has received and click **[Show]**. The *Services* screen displays details of that service episode.
    - These forms are read-only access.

****See Job Aid "Completing the Supplemental Intake Form" for detailed instructions on how to complete this screen.***

Documenting Outcomes and Measures

Screens and Navigation Path

Screen	Navigation Path
Outcomes and Measures	Jail Collab. > Services > Outcomes and Measures

Highlights & Tips

- You are expected to complete the *Outcomes and Measures* screen for your Jail Clients once you start providing services to a Jail Collaborative Client.
- You only have access to complete the *Outcomes and Measures* screens related to the services you are providing. For example, if you are providing Employment and Training services, you can only complete the *Employment and Training Outcomes and Measure* screen.
    - The information on *Outcomes and Measures* screen varies depending of the type of service provided.
    - If you provide more than one type of service for a Jail Client, highlight the service you are completing the outcomes and measures for on the *Service(s)* grid, and proceed with completing the form.
    - Complete fields relative at the time of completion. Information can be updated as needed.

See Job Aids for specific services for detailed instructions on how to complete the "Outcomes and Measures" screen.

Referring a Client for Additional Services

Screens and Navigation Path

Screen	Navigation Path
Service List	Jail Collab. > Services > Service List
Service	Jail Collab. > Services > Service

Highlights & Tips

- While providing services to a Jail Client, you may think it is necessary they receive additional services. As a provider, you can make a Service Request. Requests are sent to the Internal user responsible for the Jail Client, who ultimately makes the final decision whether or not the Jail Client receives the recommended service.
  - If the Internal user approves the request, they select the service provider. You cannot select the provider.
- Before creating a new request, review a Jail Client's service referral history in the *Service List* screen to ensure they are not already receiving those services.
  - To view all current services, select the radio button beneath the grid next to *View all Current Services Episodes.*
  - To view a complete history of all services (current and previous Intakes, if applicable), select the radio button beneath the grid next to *View All Service Episodes.*
- To refer the Jail Client for a new service, select **[New]** beneath the *Services List* grid and complete the screen.
- After saving the screen, it must be sent for approval. Click **[Approve]**. Check the *Request* box in the *Approval* pop up, and click **[OK]**.

See Job Aid "Referring a Client for Additional Services" for detailed instructions on how to complete this screen.

Admin

Activities

- Tracking Documents

Screens and Navigation Path

Screen	Navigation Path
Document Tracking	Jail Collab. > Document Tracking
File Cabinet	Admin > File Cabinet

Highlights & Tips

Document Tracking

TIP: Jail Client must be in focus to upload a document for that Jail Client.

- Navigate to the *Document Tracking* screen (**Jail Collab. > Document Tracking)**.
- The *Documents* grid will display a list of all the documents uploaded for that Jail Client.
- Add a new document:
  - Select the *Document Tracking* dropdown. Select either 'Assessment', 'Plan', or 'Other.'
    TIP: This selection determines which folder in the 'File Cabinet' this document is uploaded to.
  - Enter narrative comments about the document being uploaded in the *Description* field.
  - Click **[Save]**.
  - Click **Import.** A dialog box will open. Click **Browse** next to the *File Name* field and locate the file you wish to upload. Click on the file and then click **[OK]** (or double click on the file). The pathway to the file you selected will populate in the *File Name* field.
    - Enter narrative comments in the *Document description* field. Click **[OK].**
    - A pop-up will verify that your document was added to the file cabinet.

See Job Aid "Document Tracking and Importing" for detailed instructions on how to complete this screen.

Reports

Screens and Navigation Path

Screen	Navigation Path	Description
Reports	Jail Collab. > Reports	Client-specific reports
Reports	Admin > Reports	Provider-specific reports

Summary of Reports

Focus	Title	Parameters	Data Elements
Client Reports Jail Client reports are generated with regard to a single Jail Client. To generate a report for a specific Jail Client, pull that Jail Client into focus and navigate to the *Reports* screen **(Jail Collab. > Reports).** Highlight the report you would like to generate and click **Preview.**	Client Information Report	Client in focus	-Demographic Information -Sentenced Information -Employment History -Service Details
	Active Client Detail Report	Client in focus	-Demographic Information -Sentenced Information -Employment History -Service Details -Details of Outcomes and Measures for each service received by this Jail Client from your agency
Provider Reports Provider reports are generated with regard to a specific provider and a specified date range. To generate a report for a provider, navigate to the *Reports* screen **(Admin > Reports).** Highlight the report you would like to generate and click **Preview.** The 'Jail Reports' box will appear. Enter the date parameters for the report (Start Date and End Date). Click **[OK].**	Active Client Report by Provider	Start and End Date	Aggregate counts of Jail Clients receiving services during the selected date range for the provider(s) selected
	Aggregate Client Outcome Report by Provider	Start and End Date	Aggregate count of Outcomes and Measures for each service received by this Jail Client from your agency.
	Alternative Housing Clearance Progression Report	Start and End Date	Lists the aggregate statistics on the clearance and referral process for Alternative Housing.
	Exit Report by Client	Start and End Date	Aggregate counts of Jail Client that exited services during the selected date range
	Provider Service Statistical Report	Start and End Date	Aggregate counts of Jail Clients receiving services for the selected date range with detailed demographics breakdowns

Quick Tips

- If make a mistake on a screen, click **[Cancel]**. This will clear all the information you have entered and you can start from scratch.
- If you have logged in and there is an error, or the application does not open, check to make sure your browsers pop-up blocker is turned off.
- For assistance, please contact your Application Specialists at: ACJCSpecialists@AlleghenyCounty.US
- The Allegheny County Service Desk can be contacted at:

  ServiceDesk@AlleghenyCounty.US or 412-350-HELP (4357).

  Select Option 2 for the DHS Service Desk.
- To access iService, go to:

  https://servicedesk.alleghenycounty.us
- This and other Job Aids can be found at:

  http://s3.amazonaws.com/dhs-application-support/index.htm