



Contact Summary – Provider Job Aid

A Contact Summary is documented when there is any type of communication pertaining to a Family and its members. These records are captured on the *Client Contacts Details* screen by all users of the KIDS Application. Contacts can be documented at any phase of a Family's involvement with any program area.

Allegheny	County, Pennsylvania				K	y Information a	and Demograp) phics Sy
Referral Case Provider	Admin					Help Logout	ase 🔽	
se D Client D Collateral Contacts	Case Plan Q Service Q TANF Q People Search Q							
In Focus	* Denotes Required Fields ** Denotes Half-Mano	atory Fields [‡] Denotes	AFCARS Fields					
User Name:	Contacts	I∢ 44 ∢	2345	67891	o è ∌è èi	5 200 P 355 PI		
Family Assignment: Entity Type:							Resu	Its 1 - 1 o
Entity Name:	Staff Name Date Type/Loc	stion Status	Source	Origin	Contact Descript	on	Meeting Prep	Source
Entity ID:								
Entity Type:								
Entity Name:								
Entity ID:								
	ODHS OProvider OAII							
	New Filter							
	Contact History							
	Staff Name	Type/Location		Contact Sta	tus Source	Updated Date	Record Source	
	Staff Name Find	Type / Lo	ocation*		~	Emergency Cor	ntact	
	Source	Date*	Time*		м. Ор.м.	Courtesy Conta	ict Performed	
	Provider Agency	Provider	Contact Numbe	er *				
		Duration	Trave	l Time				
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	Notification O Announced O Unannounced Status	Contact I	Description					
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	Notification Announced Unannounced Status Attempted Completed Client(s) Visited/Contacted	Contact I	Description			_		
	Notification Announced © Unannounced Status Attempted © Completed Client(s) Visited/Contacted Child(ren)**	Contact	Description	Other Participa	nts**			_
	Notification Announced Ounannounced Status Attempted Ocompleted Client(s) Visited/Contacted Child(ren)**	Contact	Description	Other Participa	nts**			
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	Notification Announced Unannounced Status Attempted Completed Client(s) Visited/Contacted Child(ren)** Select Contact By:*	Contact	Description	Other Participa	nts**			
	Notification Announced © Unannounced Status Attempted © Completed Client(s) Visited/Contacted Child(ren)** Select Contact By:*	Contact	Description	Other Participe	nts**			
	Notification Amounced Ounannounced Status Attempted Ocompleted Client(s) Visited/Contacted Child(ren)** Select Contact By:* Contact Details Contact Details Assessment Do	Contacti Contact	Considerations	Other Participa Select	nts**	Meeting Prep		
	Notification Announced O Unannounced Status Attempted O Completed Chient(s) Visited/Contacted Child(ren)** Select Contact Details Contact Details Assessment Do Purpose*	Contact	Description	Other Participa Select	nts**	Meeting Prep		
	Notification Announced Unannounced Status Attempted Completed Child(ren)** Select Contact Details Contact Details Purpose*	Contact	Considerations	Other Participa Select	nts**	Meeting Prep		
	Notification Announced © Unannounced Status Attempted © Completed Chient(s) Visited/Contacted Child(ren)** Select Contact Details Purpose* Select Were the seven assessment domains consider	Contact	Considerations	Other Particips Select	nts**	(Meeting Prep		





Navigation and Filtering

- 1. Navigate to the *My Services* Screen and bring the Referral/Service Episode into focus.
- Navigate to the *Client Contact Details* screen.
 a. Case > Contacts
- 3. When creating the first Contact on a Service Episode the New button below the *Contacts* grid will be greyed out (New). After the first Contact has been saved the user will click the New button below the *Contacts* to document subsequent Contacts.
- 4. The *Contacts* grid contains a list of all of the documented contacts for the Case.

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				Result	s 1 - 1 of 1
					Record
Staff Name Date Type/Location	Status	Source Origin	Contact Description	Meeting Prep	Source
•					
DHS • Provider O All					

The *Contacts* grid will only display contacts entered by the provider. If the Contact was documented directly in KIDS The *Record Source* will be "KIDS". If the Contact was documented via the Provider Data Exchange the *Record Source* will be "DXP" or "SFTP".

5. The *Contacts* grid can be filtered by clicking the ^{Filter} button below the grid. The *Filter Criteria* control will open up. The contacts can be filtered by Date(s) or by Type/Location. Select the radio button next to the desired filter criteria, complete the filter information and click ^{Ok}. To remove the filter click ^{Cancel}.

Filter Criteria	
Date(s)	From To
O Type/Location	
OK Cancel	

6. The Contact History section displays all the versions of the Contact that is highlighted in the Contacts grid. Contacts can be amended; each version is preserved in the Contact History grid. This grid defaults to the latest version of the contact. To view all versions of the contact click the I radio button below the Contact History grid.

C	ontact History					
	Staff Name	Type/Location	Contact Status	Source	Updated Date	Record Source
Þ	Contract of the provident of the second					
۲	Latest O All					





Completing the Contact Summary

The Contact Summary is completed in a 'waterfall' order. This means that each field is dependent upon the field before it. Fields are to be completed in a top to bottom, left to right order. Once a field is completed the screen will refresh, activating the correct options for the following field.

1. General Information:

General Information	-
Staff Name	Type / Location*
Source	Date* Time* O A.M. O P.M. C Courtesy Contact Performed
Notification	
O Announced I Unannounced	

- a. The *Staff Name* displays the name of the logged in user. To document on behalf of another staff member click the **Find** button to display the *Find Staff* pop-up and search and select a different user. The *Source* and *Provider Agency* are automatically populated and read only fields.
- b. Select the *Type/Location* of the Contact from the drop down menu.
- c. Enter the *Date* and *Time* and select the AM or PM radio button. Note that a future date/time cannot be documented for a Contact.
- d. Check the *Emergency Contact* checkbox if it applies to this contact.
 - a. The *Courtesy Contact Performed* checkbox is for internal CYF staff only and should not be used by provider staff.
- e. Enter the Provider Contact Number.
- f. *Duration* and *Travel Time* can be entered but are not mandatory fields.
- g. Select whether or not the contact *Announced* or *Unannounced* by clicking on the correct radio button.
- h. Select whether or not the contact was *Attempted* or *Completed* by clicking on the correct radio button.
- i. A brief *Contact Description* can be entered but is not mandatory.
- 2. *Clients Visited/Contacted*:

Client(s) Visited/Contacted	
Child(ren)**	Other Participants**
Select	Select
Contact By:*	

- a. *Child(ren)* and *Other Participants* are half mandatory fields meaning that the user must enter selections in one or both of the fields.
 - a. Use the Select button choose the *Child(ren)* and/or *Other Participants* who were present or participated in the contact. Individuals listed in the Multi-Select pop up are active clients or collateral on the case.





3. Contact Details:

Contact Detail s						
Contact Details	Assessment Domains	Safety Considerati	ons	Safety Indicators	Meeting Prep	
Purpose* Select Were the seven assessment of Functioning, Adult Functioning Are there further safety consi Comments*	domains considered (Type , General Parenting, Parer derations?*	of Maltreatment, Nature of nting Discipline and Addition	the Maltreatmen al Information)?	it, Child		

- a. Use the Select button and choose from the Multi-Select pop up all of the items that describe the *Purpose* of the Contact.
- b. The *seven assessment domains* and *further safety considerations* drop downs are only completed by internal CYF staff and are read only for provider staff.
- c. In the *Comments* section enter a detailed description of the Contact.
- d. The Assessment Domains, Safety Considerations, Safety Indicators and Meeting Prep tabs are only completed by internal CYF staff and are not accessible to provider staff.
- 4. When the Contact is complete click the **Save** button at the bottom of the screen.
 - a. A pop up message will appear advising that "The initial version of this contact will become read-only once it is saved. Changes can be made, but will be recorded as amendments to the original contact record"
 - b. If no further changes are needed to the Contact click the Ok button to close the pop up. If further changes are needed click the Cancel button, make the necessary changes and click the Save button again.
- 5. To amend a contact select the Contact from the Contacts grid and click the Amend button at the bottom of the screen. This will unlock the Contact. Make any necessary changes and click the Save button again.
 - a. A pop up message will appear advising that "You are about to create an amended version of the contact record. Are you certain you want to proceed?"____
 - b. If no further changes are needed to the Contact click the Ok button to close the pop up. If further changes are needed click the Cancel button, make the necessary changes and click the Save button again.
- 6. To view a printable pdf version of the Contact click the **Preview** button at the bottom of the screen.

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://dhswbt.s3.amazonaws.com/KIDSJobAids/index.htm