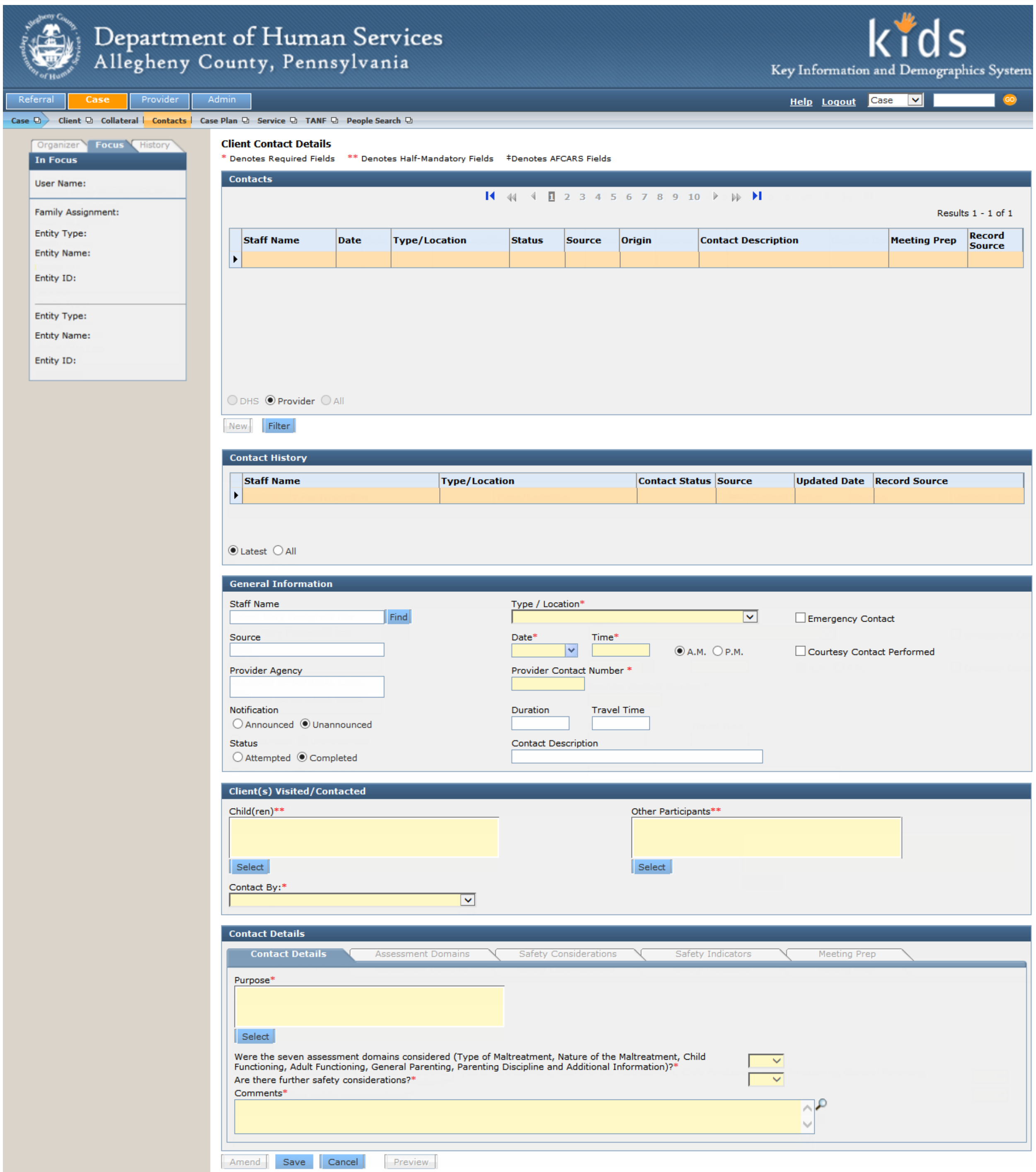
Contact Summary – Provider Job Aid

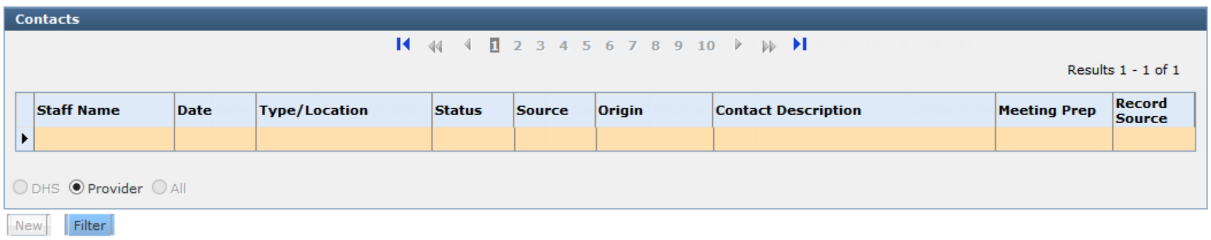
A Contact Summary is documented when there is any type of communication pertaining to a Family and its members. These records are captured on the *Client Contacts Details* screen by all users of the KIDS Application. Contacts can be documented at any phase of a Family's involvement with any program area.

Client Contact Details Screen



Navigation and Filtering

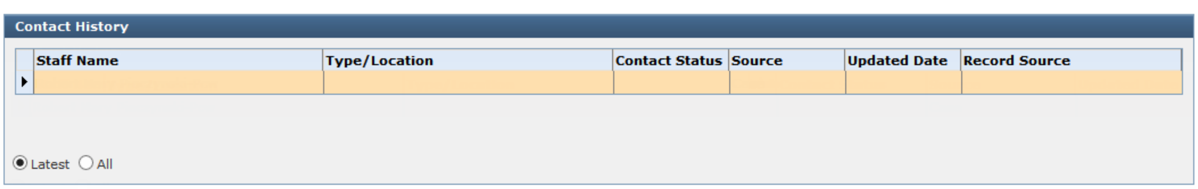
1. Navigate to the *My Services* Screen and bring the Referral/Service Episode into focus.
2. Navigate to the *Client Contact Details* screen.
   a. **Case > Contacts**
3. When creating the first Contact on a Service Episode the New button below the *Contacts* grid will be greyed out (New). After the 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.



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.

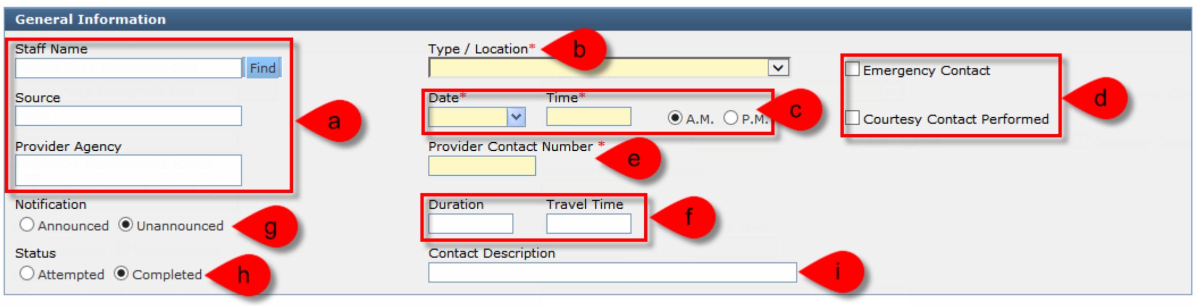
6. The *Contact History* section displays all the versions of the Contact that is highlighted in the Contacts grid. Contacts can be amended; each version is preserved in the *Contact History* grid. This grid defaults to the latest version of the contact. To view all versions of the contact click the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



Completing the Contact Summary

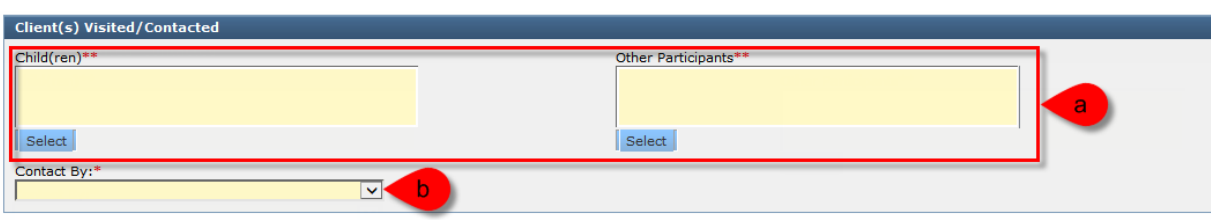
The Contact Summary is completed in a 'waterfall' order. This means that each field is dependent upon the field before it. Fields are to be completed in a top to bottom, left to right order. Once a field is completed the screen will refresh, activating the correct options for the following field.

1. *General Information*:



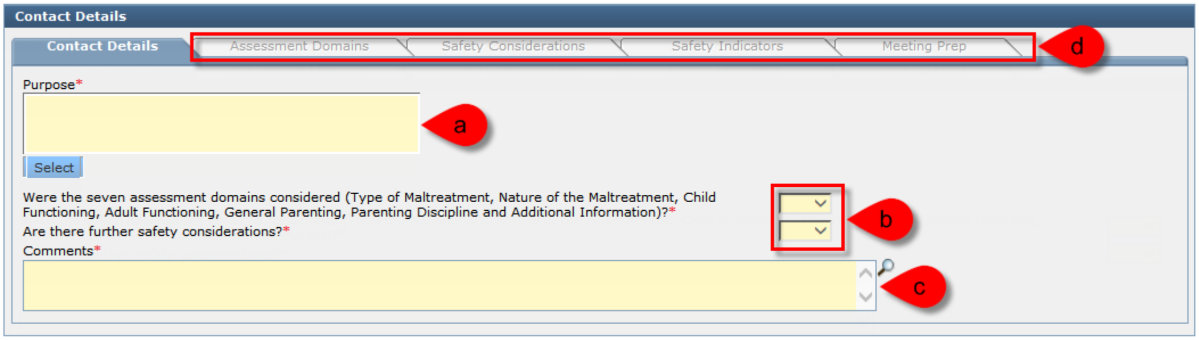
   a. The *Staff Name* displays the name of the logged in user. To document on behalf of another staff member click the Find button to display the *Find Staff* pop-up and search and select a different user. The *Source* and *Provider Agency* are automatically populated and read only fields.
   b. Select 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*:



   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*:



   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