



My Active Services – Non Placement Provider Job Aid

The *My Services* (**My Active Services**) screen is used by Non Placement providers to view and bring into focus the clients and Service Episodes that are assigned to their agency. A provider caseworker will see the clients/Service Episodes assigned to them. Provider Supervisors and above will see all clients/Service Episodes assigned to their agency.

My Active Services – Non Placement Screen

Department of Human Services
Allegheny County, Pennsylvania

Key Information and Demographics System

ReferralCaseProviderAdminHelpLogoutCase

OrganizerFocusHistoryWorkLoadMy Active Services

My TasksMy RequestMy Approval InboxOnline Service RequestsMy Alerts

My Services

*Denotes Required Fields** Denotes Half-Mandatory Fields† Denotes AFCARS Fields

Filter Criteria

☒ Active Services☐ Inactive Services

☐ Client Characteristics

First NameStarts With

Middle NameStarts With

Last NameStarts With

Date Of Birth

☐ SSN

☐ Client ID

☐ Household Name

Start

End

Agencies

SearchClear

☒ Approved Records☐ Unapproved Records

PlacementNonPlacement

Cases

Results 1 - 20 of 194

Request Date	ENTITY ID	Client ID	Target Child	Household Name	Status	Involvement	Service Start Date	Service End Date	Reauthorization Date
03/11/2015	53730	1004448	Aiden Miller	Davis	Service Authorized	CYF	01/05/2015		02/04/2015
03/17/2014	52784	997947	Ariel Simmons	Simmons		CYF	02/17/2014		03/19/2014
03/17/2014	53086	1001038	Ariel Simmons	Stauffer	Service Authorized	CYF	02/17/2014		03/19/2014

Provider Staff

Workers

Staff Name

Supervisor Name

Staff Phone

Supervisor Phone

Save

Posting Details

Client(s)

Service(s)

ShowCancel



Navigation and Filters

1. Navigate to the *My Services* Screen
 - a. Under the **Organizer** tab in the Left Navigation Pane under Workload click on **My Active Services**
 - b. Click on the **NonPlacement** tab. (NOTE: This screen defaults to the Placement tab)
2. Filtering the list of Cases.

The screenshot shows the 'My Services' filter criteria form. At the top, there are three legends: '* Denotes Required Fields', '** Denotes Half-Mandatory Fields', and '† Denotes AFCARS Fields'. The form has two radio buttons: 'Active Services' (selected) and 'Inactive Services' (callout 'a'). Below this is a section titled 'Client Characteristics' with a checkbox. Inside this section, there are three columns of fields: 'First Name' (Starts With dropdown and text box), 'Middle Name' (Starts With dropdown and text box), 'Last Name' (Starts With dropdown and text box), 'Date Of Birth' (dropdown), 'SSN' (checkbox and text box), 'Client ID' (checkbox and text box), and 'Household Name' (checkbox, Household Name text box, and Starts With dropdown). The entire 'Client Characteristics' section is highlighted with a red box (callout 'b'). Below this is a 'Start' and 'End' date selection area (callout 'c'). At the bottom is an 'Agencies' dropdown menu (callout 'd') and 'Search' and 'Clear' buttons.

- a. The list defaults to *Active Services*. To view *Inactive Services* select the **Inactive Services** radio button. Inactive Services are viewable up to 10 days after the service end date.
- b. To filter based on client/case characteristics check the box next to the desired filter criteria and complete the yellow fields that are enabled. The list may only be filtered by one criteria at a time.
- c. To filter based on the start date of the Service Episode select a *Start* and *End* date.
- d. The Agencies field defaults to the agency of the logged in user.

Once the Filter Criteria has been selected and entered click the **Search** button to filter.

To return to the full list click the **Clear** button.



Using the Non Placement – Cases tab

1. Cases – NonPlacement Tab:

☒ Approved Records ☐ Unapproved Records

Placement NonPlacement

Cases

Results 1 - 20 of 194

Request Date	ENTITY ID	Client ID	Target Child	Household Name	Status	Involvement	Service Start Date	Service End Date	Reauthorization Date
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Provider Staff

Workers Save

Staff Name Supervisor Name

Staff Phone Supervisor Phone

Posting Details

Client(s)

Service(s)

Show Cancel

- The Cases grid defaults to *Approved Records*. To view *Unapproved Records* select the ☐ **Unapproved Records** radio button. Unapproved Records are Service Episodes that have not been fully approved. These Service Episodes can be viewed but not edited.
- The Cases grid contains cases assigned to the agency. Provider workers can view cases assigned to them via the Provider Staff section. Provider Supervisors and above can view all of the cases assigned to the agency. The Cases grid will display 20 results at a time. To navigate to more results use the blue page numbers and arrows above the grid.



The grid can be sorted by the grid headings. Click on the name of the column in the blue Header to sort on that column. A triangle (sort indicator) will appear in that column to show the direction that the grid has been sorted. Example: **Target Child ▲**

- Provider Staff section:
 - Provider Supervisors can assign Cases/Service Episodes to specific provider staff by selecting the name of the provider staff person in the Workers drop down menu and clicking **Save** at the bottom of the screen.
- The *Staff Name*, *Staff Phone*, *Supervisor Name*, and *Supervisor Phone* fields will display the names and phone numbers of the CYF Caseworker and Supervisor who are assigned to the case.
- The *Posting Details* section displays the *Client(s)* included in the Case and the MPER *Service(s)* attached to the Service Episode.



2. To bring a Case/Service Episode into focus. Select the Case/Service Episode from the Cases grid and click the **Show** button at the bottom of the screen. The Non Placement Services Referral screen will then be displayed and the case will be in focus. (For more information on the Non Placement Services Referral Screen can be found in the **Non Placement Services Referral and Packet Details Provider Job Aid**.)

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.htm>