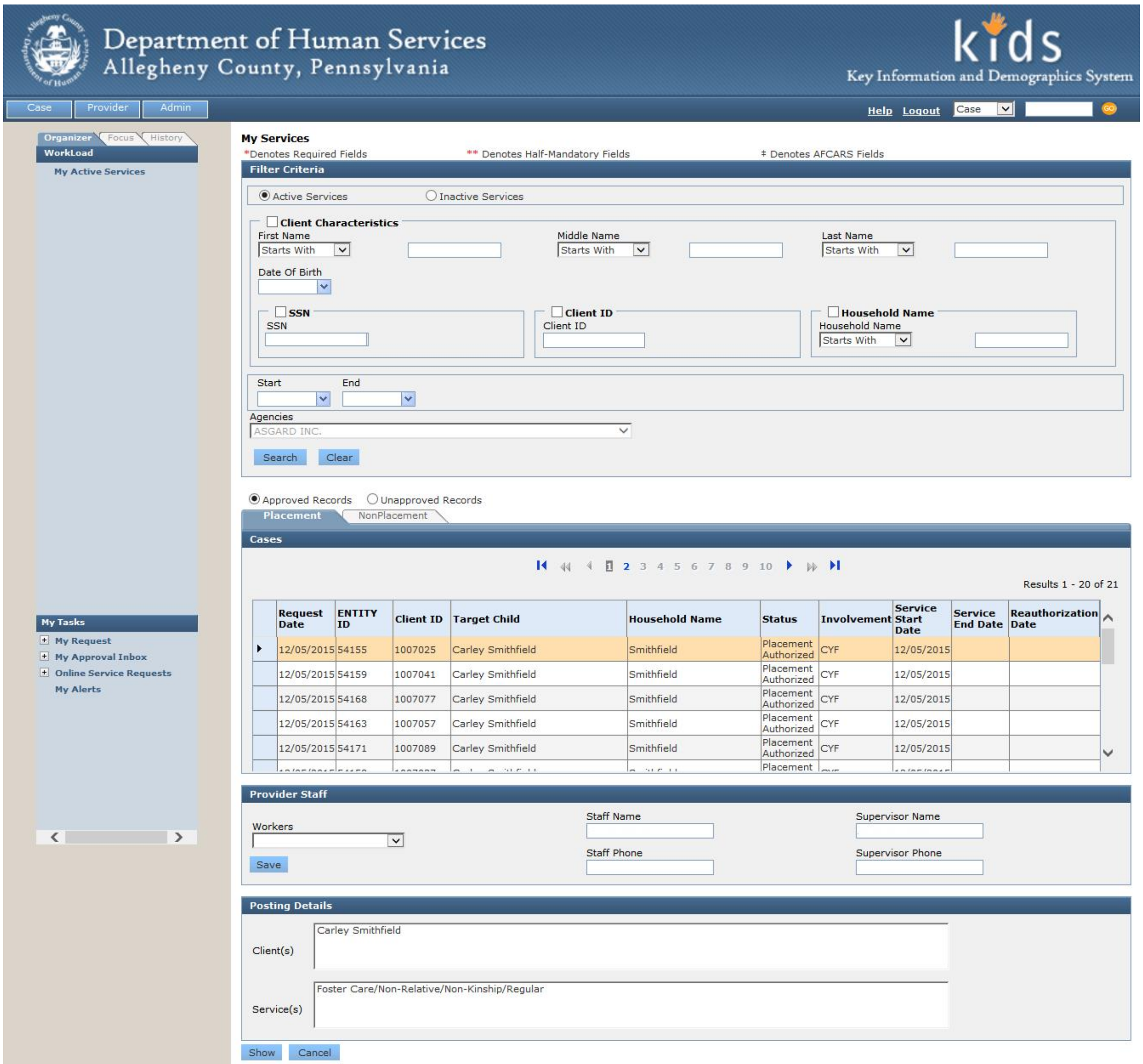
My Active Services – Placement Provider Job Aid

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

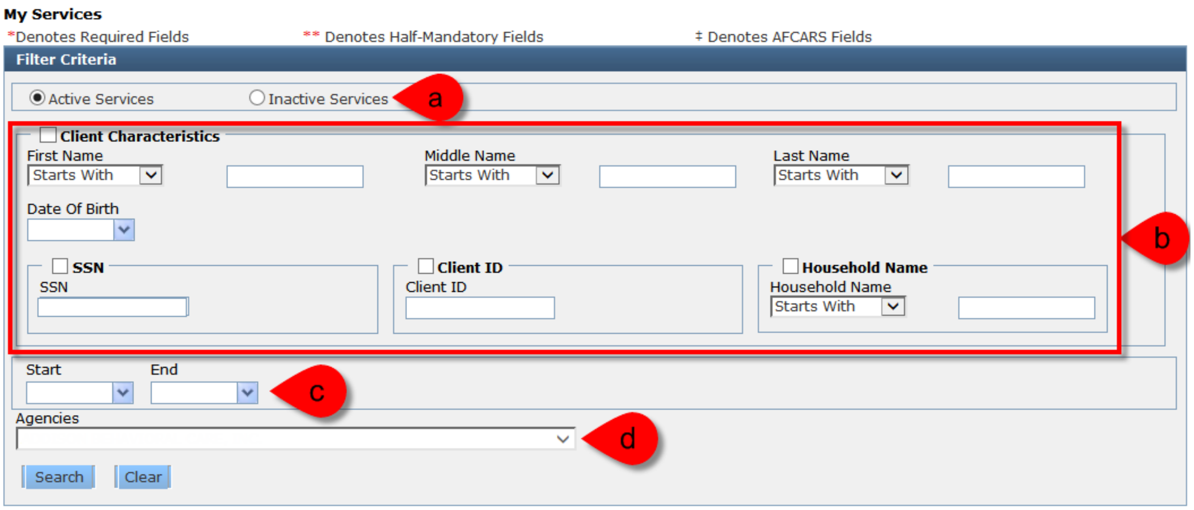
My Active Services – Placement Screen



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**

2. Filtering the list of Cases.



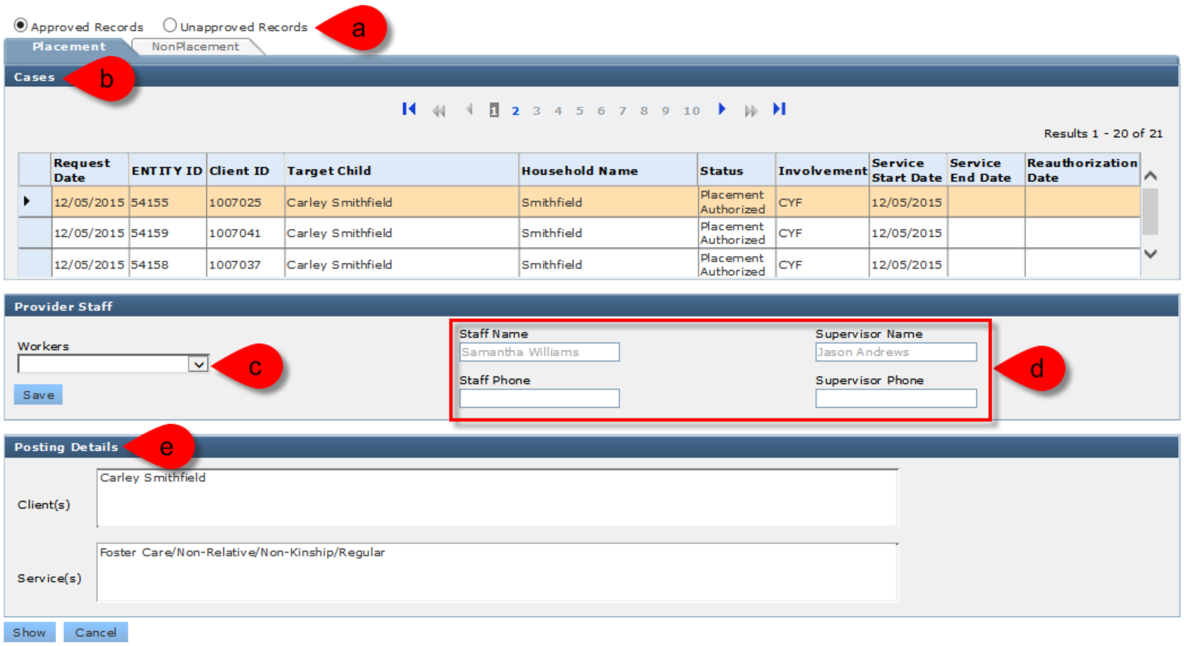
   a. The list defaults to *Active Services*. To view *Inactive Services* select the Inactive Services radio button. *Inactive Services* are viewable up to 10 days after the placement end date.
   b. To filter based on client/case characteristics check the box next to the desired filter criteria and complete 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 Placement – Cases tab

1. Cases – Placement Tab:



a. The *Cases* grid defaults to *Approved Records*. To view *Unapproved Records* select the ◯ Unapproved Records radio button. Unapproved Records are Placements that have not been fully approved. These Placements can be viewed but not edited.

b. 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.

1 2 3 4 5 6 7 8 9 10

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 ▲

c. Provider Staff section:
    i. 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.

d. 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.

e. 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 into focus:
   a. Select the Case/Target Child from the *Cases* grid and click the Show button at the bottom of the screen. The *Placement Entry* screen will then be displayed and the case and target child will be in focus.

For more information…

For assistance, please contact the Allegheny County Service Desk at ServiceDesk@AlleghenyCounty.US or call 412-350-HELP (4357). Select Option 2 for the DHS Service Desk.
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