



# 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

**My Services**  
\*Denotes Required Fields    \*\* Denotes Half-Mandatory Fields    † Denotes AFCARS Fields

**Filter Criteria**

Active Services     Inactive Services

**Client Characteristics**

First Name: Starts With [v] [ ] Middle Name: Starts With [v] [ ] Last Name: Starts With [v] [ ]

Date Of Birth: [v]

SSN: [ ]     Client ID: [ ]     Household Name: Starts With [v] [ ]

Start: [v] End: [v]

Agencies: [ASGARD INC. v]

[Search] [Clear]

Approved Records     Unapproved Records

Placement     NonPlacement

**Cases**

Results 1 - 20 of 21

Request Date	ENTITY ID	Client ID	Target Child	Household Name	Status	Involvement	Service Start Date	Service End Date	Reauthorization Date
12/05/2015	S4155	1007025	Carley Smithfield	Smithfield	Placement Authorized	CYF	12/05/2015		
12/05/2015	S4159	1007041	Carley Smithfield	Smithfield	Placement Authorized	CYF	12/05/2015		
12/05/2015	S4168	1007077	Carley Smithfield	Smithfield	Placement Authorized	CYF	12/05/2015		
12/05/2015	S4163	1007057	Carley Smithfield	Smithfield	Placement Authorized	CYF	12/05/2015		
12/05/2015	S4171	1007089	Carley Smithfield	Smithfield	Placement Authorized	CYF	12/05/2015		

**Provider Staff**

Workers: [v]    Staff Name: [ ]    Supervisor Name: [ ]

[Save]    Staff Phone: [ ]    Supervisor Phone: [ ]

**Posting Details**

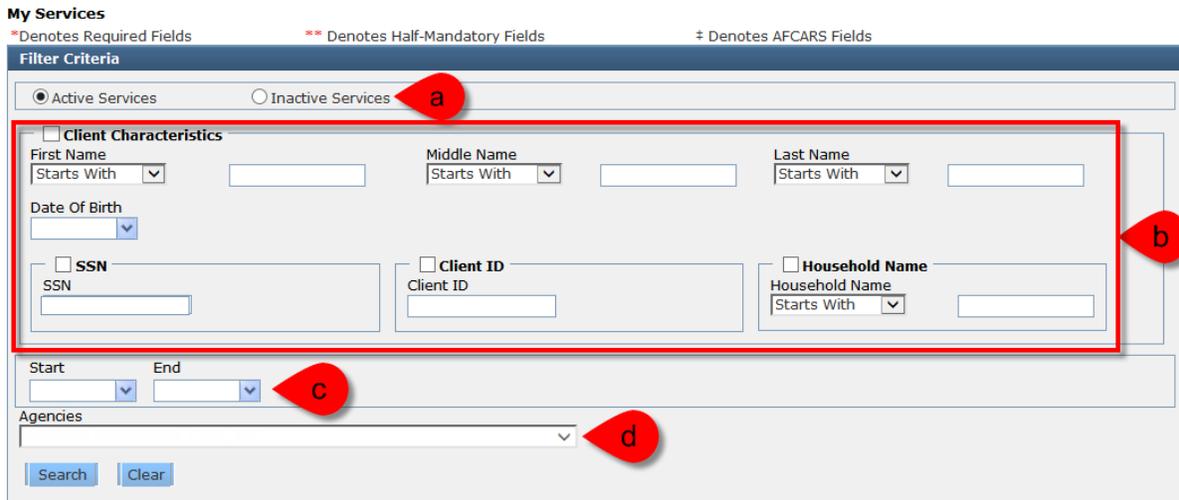
Client(s): [Carley Smithfield]

Service(s): [Foster Care/Non-Relative/Non-Kinship/Regular]

[Show] [Cancel]

**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.



The screenshot shows the 'My Services' filter criteria interface. At the top, there are radio buttons for 'Active Services' (selected) and 'Inactive Services'. Below this is a section for 'Client Characteristics' with a checkbox and several input fields: 'First Name' (with a 'Starts With' dropdown), 'Middle Name' (with a 'Starts With' dropdown), 'Last Name' (with a 'Starts With' dropdown), 'Date Of Birth' (with a dropdown), 'SSN', 'Client ID', and 'Household Name' (with a 'Starts With' dropdown). Below the client characteristics is a 'Start' and 'End' date selection area, and an 'Agencies' dropdown menu. At the bottom are 'Search' and 'Clear' buttons. Red callouts 'a', 'b', 'c', and 'd' point to the 'Inactive Services' radio button, the 'Client Characteristics' section, the 'Start' and 'End' date fields, and the 'Agencies' dropdown menu, respectively.

- 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:

The screenshot shows the 'Placement' tab interface. At the top, there are radio buttons for 'Approved Records' (selected) and 'Unapproved Records'. Below this is a 'Cases' grid with columns: Request Date, ENTITY ID, Client ID, Target Child, Household Name, Status, Involvement, Service Start Date, Service End Date, and Reauthorization Date. The grid shows three rows of data for Carley Smithfield. Below the grid is the 'Provider Staff' section with a 'Workers' dropdown menu and a 'Save' button. To the right are input fields for 'Staff Name', 'Supervisor Name', 'Staff Phone', and 'Supervisor Phone'. Below that is the 'Posting Details' section with input fields for 'Client(s)' and 'Service(s)'. Red callouts 'a' through 'e' point to specific UI elements: 'a' points to the radio buttons, 'b' to the 'Cases' tab header, 'c' to the 'Workers' dropdown, 'd' to the 'Supervisor Name' field, and 'e' to the 'Posting Details' section header.

- 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.



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](mailto: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://dhswebt.s3.amazonaws.com/KIDSJobAids/index.htm>