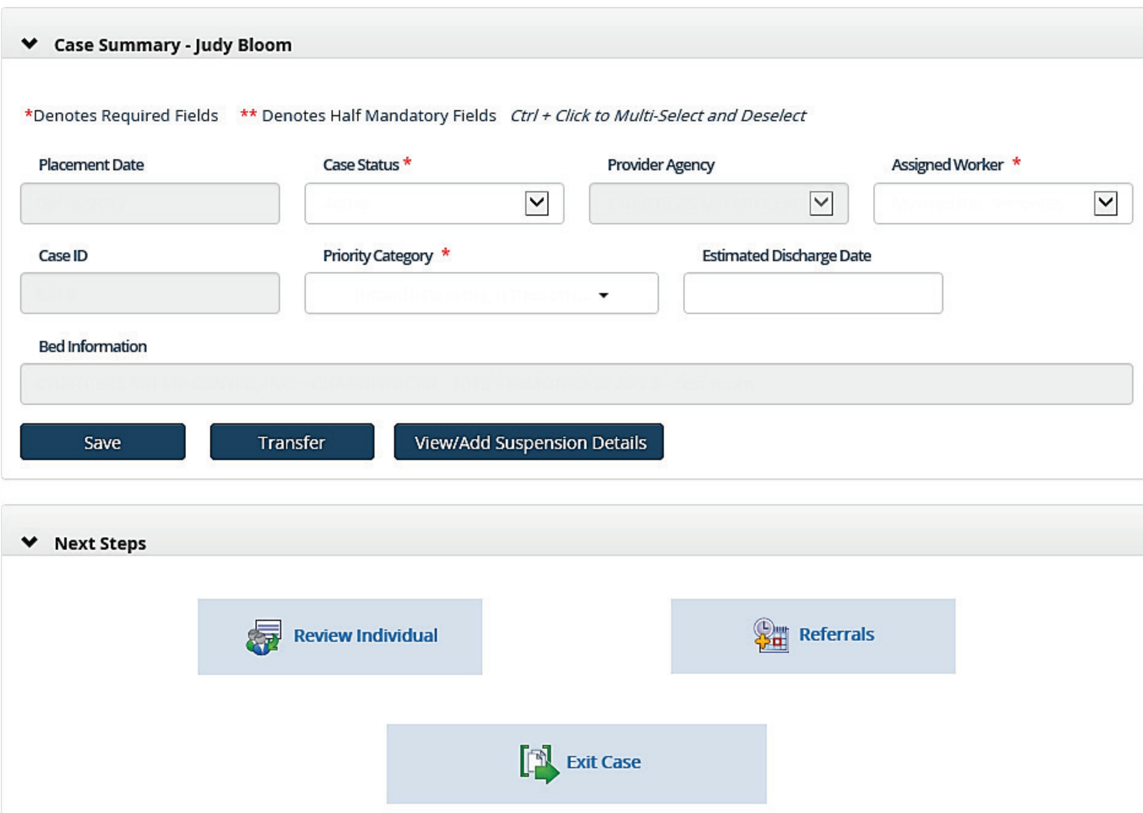
Case – Summary
MH Residential Job Aid

The *Summary* Screen displays basic assignment and case status information which can be updated by Supervisors and Managers. This screen also contains links to other sections of the Case. This is the screen is the only screen within a Case where a user can edit information in the *Summary* pane. Home Visiting Referrals can be viewed from this screen and the Home Visiting status can also be updated from this screen.

Summary

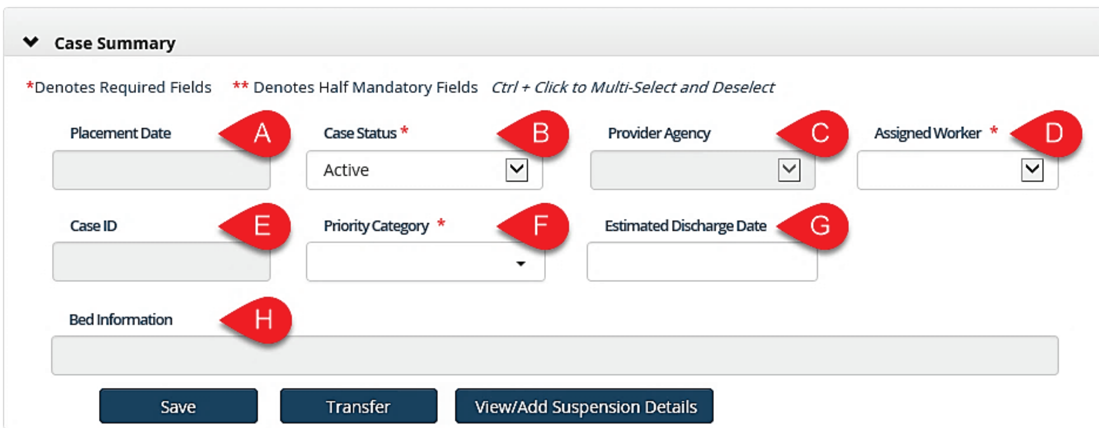


Navigation

1. From the Dashboard: Locate the desired Case and click on the *Case ID* to bring the Case into focus; the Summary › tile will open automatically.
2. From within the Case: Click on the ⌄ Case Information tile. Then click on the Summary › tile.

Case Summary Pane

1. Case Summary pane: This pane will be displayed at the top of every Case screen and will include the Consumer's name in the header. This pane contains the following information:



   a. *Placement Date*: Displays the date that the Consumer was placed in this bed.

   b. *Case Status*: The Case Status defaults to "Active" on all new Cases. The status can be changed to "Discharged" if the Consumer has been discharged.

   c. *Provider Agency*: This drop-down defaults to the placement agency's name.

   d. *Assigned Worker*: The worker assigned to the Referral is listed here and can be changed by selecting another worker from the drop-down.

   e. *Case ID*: The Case ID will be generated by Synergy and cannot be changed.

   f. *Priority Category*: Select all of the categories that apply to the Referral using the multi-select drop-down. Selections made in Referral will carry over to Case.

   g. *Estimated Discharge Date*: If known, enter the estimated discharge date.

   h. *Bed Information*: This displays the name of the bed which typically includes the agency name and location as well as a specific bed designation.

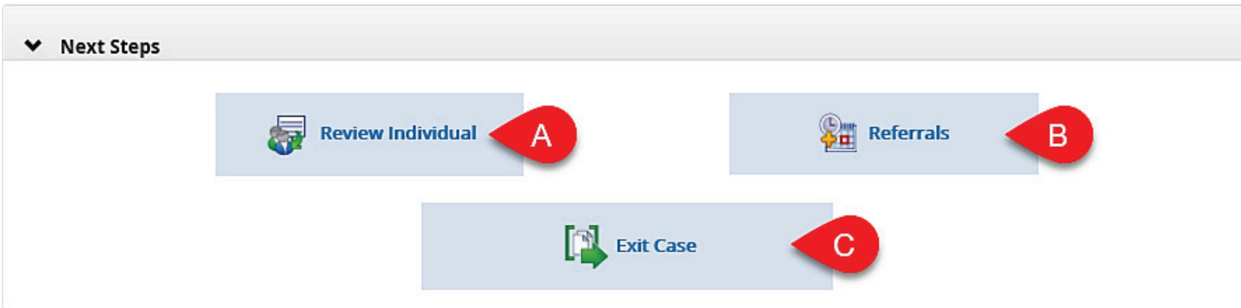
2. Click **Save** to save any information that has been changed or updated.

3. Clicking **Transfer** will initiate the transfer process. Use this when transferring to a higher or lower level of care. Transfers of the same level of care can be within the same site, between sites, or to a different provider all together.

4. Click **View/Add Suspension Details** to view or add new bed Suspension dates/details.

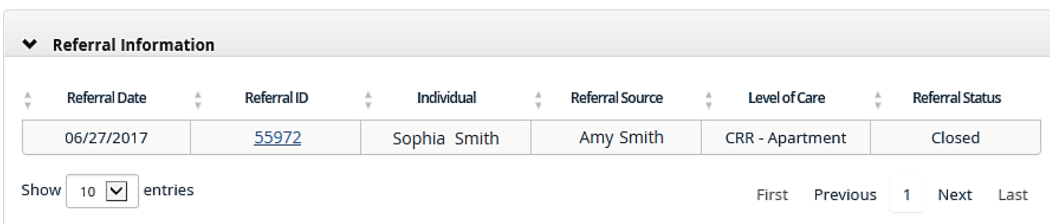
Next Steps

1. Next Steps pane: This pane contains some helpful navigation links.



   a. Review Individual: Clicking this button navigates the user to the ***Case – Individual Info*** screen.

   b. Referrals: Clicking on this button displays all of the referrals linked to this Case.



Referral Information

Referral Date	Referral ID	Individual	Referral Source	Level of Care	Referral Status
06/27/2017	55972	Sophia Smith	Amy Smith	CRR - Apartment	Closed

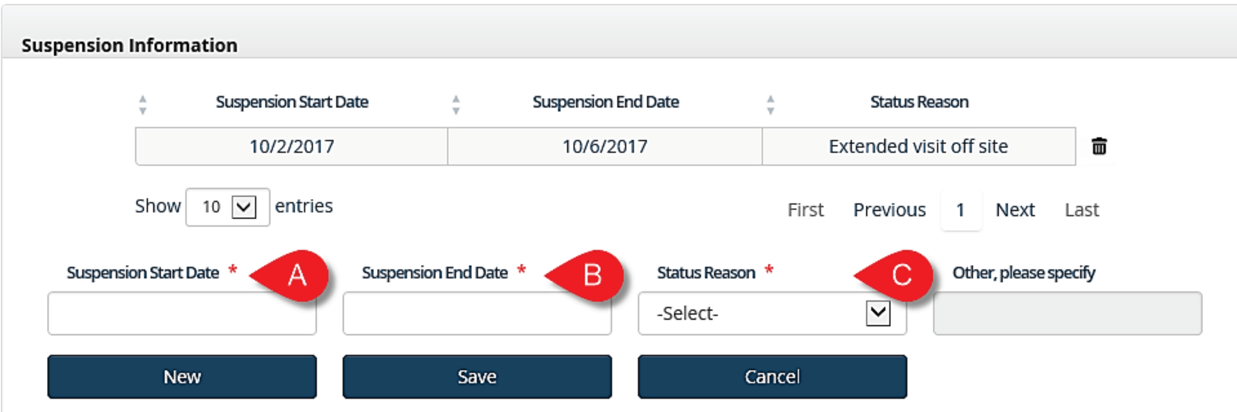
Show 10 entries First Previous 1 Next Last

   To return to the main **Summary** screen, click on the Case Information tile. Then click on the Summary tile.

   c. Exit Case: Clicking this button navigates the user to the Dashboard.

Entering Suspension Details

1. Entering Suspension Details: Click **View/Add Suspension Details** in the **Case Summary** pane to open the *Suspension Information* pop-up:

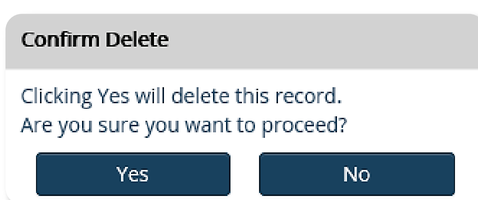


   a. *Suspension Start Date*: If the room has been suspended, enter the Suspension start date.

   b. *Suspension End Date*: When the room Suspension has ended, enter the Suspension end date.

   c. *Suspension Reason*: Select the reason for Suspension from the drop-down. If the specific reason is not listed in the drop-down, select "Other-please specify" from the drop-down and enter the specific reason in the *Other, please specify* field.
   Click **Save** to save the details to the grid.
   Click **New** to add another Suspension to the grid.
   Clicking **Cancel** will close the *Suspension Information* pop-up. Any unsaved information will be lost.

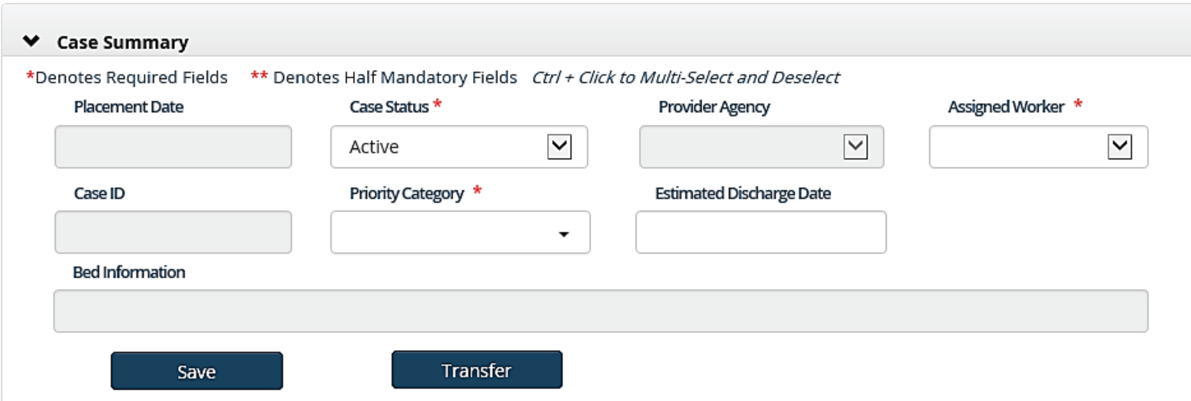
2. To delete a Suspension that was entered in error, click the Delete Icon [🗑] to the right of the Suspension in the grid. A *Confirm Delete* pop-up will appear:



Clicking **Yes** will delete the Suspension.
Clicking **No** will cancel the action and the Suspension will not be deleted.

Closing the Case (Discharge)

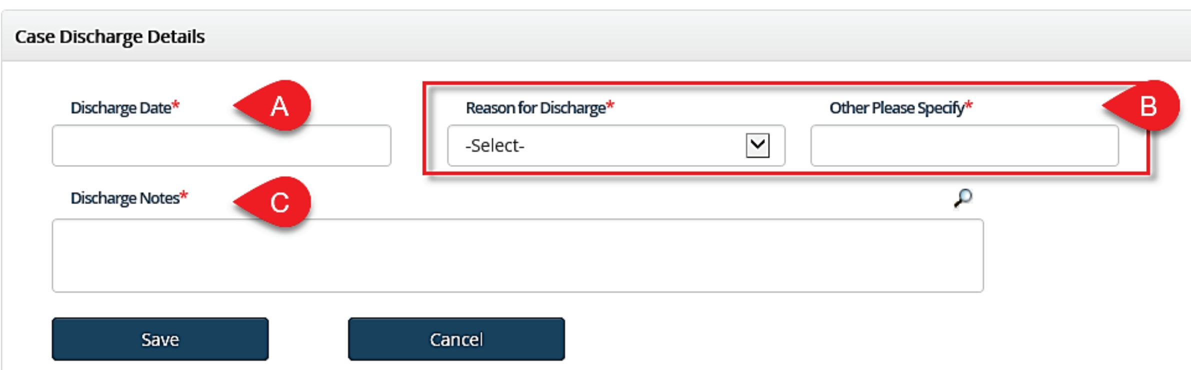
1. Case Summary pane:



   a. Once the approximate discharge date is known, enter that date in the *Estimated Discharge Date* field and click Save.

   b. When the Consumer has been discharged, select "Discharged" from the *Case Status* drop-down.

2. Complete the *Case Discharge Details* pop-up:



   a. *Discharge Date*: Enter the actual date of discharge.

   b. *Reason for Discharge* and *Other Please Specify*: Select the *Reason for Discharge* from the drop-down. If the discharge reason is not one of the drop-down options, select "Other-Please Specify" from the drop-down and enter the reason in the *Other Please Specify* field.

   c. *Discharge Notes*: Enter details about the discharge in the narrative box.

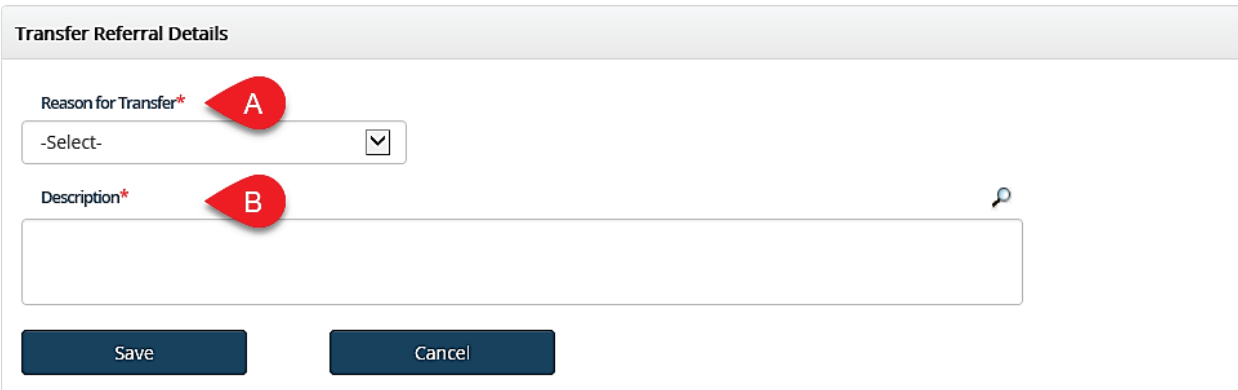
   d. Click Save to save the information entered and close the Case.

      Clicking Cancel will close the pop-up without saving the information entered and the Case will not be closed.

Transferring the Case

1. Case Summary pane: Click Transfer to transfer the Consumer to another bed.
   a. When the Consumer has been discharged, select "Discharged" from the *Case Status* drop-down.

2. Complete the *Transfer Referral Details* pop-up:



   a. *Reason for Transfer*: Select the reason for transfer from the drop-down.
   b. *Description*: Enter details about the transfer.
   c. Click Save to save the information entered and initiate a transfer.
      Clicking Cancel will close the pop-up without saving the information entered and the transfer will not be initiated.
3. One the Transfer Referral Details have been completed a new Referral for the Consumer will automatically be created.
4. This Referral will appear on the user's Dashboard under Pending Referrals. Information from the Case will carry over into the new Referral.

5. Complete and submit the new Referral to DHS.

6. Once the Consumer has been accepted into a new bed placement, the current Case can then be closed.

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 I-Service, go to: https://servicedesk.alleghenycounty.us

This and other Job Aids can be found at: http://s3.amazonaws.com/dhs-application-support/index.htm or http://dhsassist.dhs.allegheny.local for internal users.