

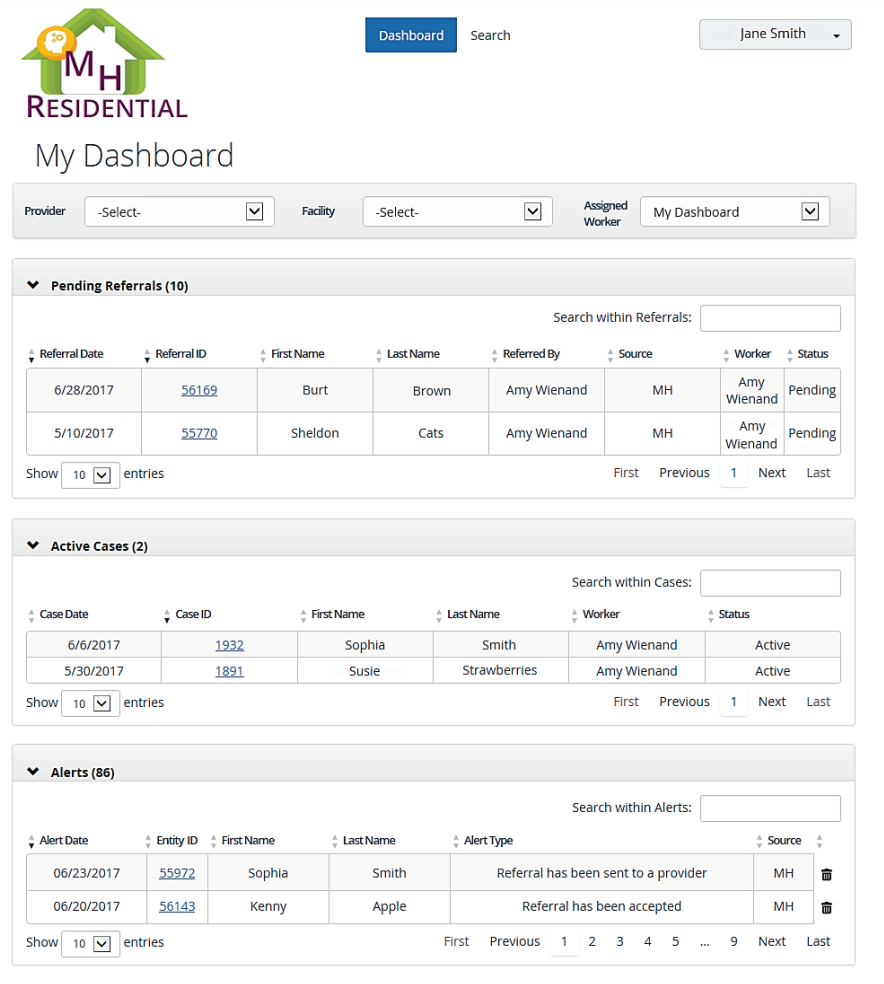


My Dashboard – Providers

MH Residential Job Aid

The *My Dashboard* screen allows workers to access their Referrals and Cases as well as alerts.

My Dashboard



The screenshot shows the 'My Dashboard' interface for a provider. At the top, there is a header with the MH Residential logo, a 'Dashboard' button, a search bar, and a user dropdown menu showing 'Jane Smith'. Below the header, there are three main sections: 'Pending Referrals (10)', 'Active Cases (2)', and 'Alerts (86)'. Each section has a search bar and a table of data. The 'Pending Referrals' table has columns for Referral Date, Referral ID, First Name, Last Name, Referred By, Source, Worker, and Status. The 'Active Cases' table has columns for Case Date, Case ID, First Name, Last Name, Worker, and Status. The 'Alerts' table has columns for Alert Date, Entity ID, First Name, Last Name, Alert Type, and Source. Each table has a 'Show' button with a dropdown menu and pagination controls.

Pending Referrals (10)

Referral Date	Referral ID	First Name	Last Name	Referred By	Source	Worker	Status
6/28/2017	56169	Burt	Brown	Amy Wienand	MH	Amy Wienand	Pending
5/10/2017	55770	Sheldon	Cats	Amy Wienand	MH	Amy Wienand	Pending

Active Cases (2)

Case Date	Case ID	First Name	Last Name	Worker	Status
6/6/2017	1932	Sophia	Smith	Amy Wienand	Active
5/30/2017	1891	Susie	Strawberries	Amy Wienand	Active

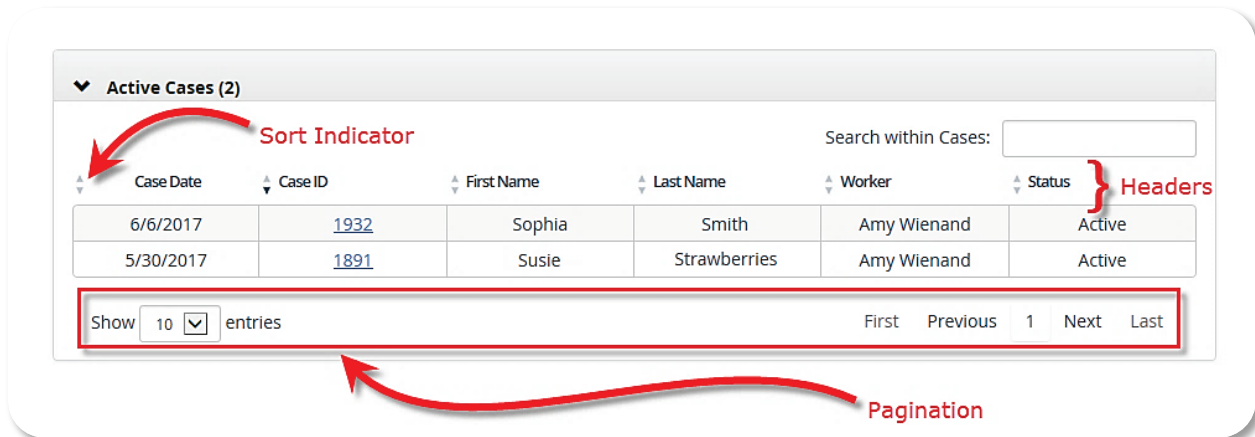
Alerts (86)

Alert Date	Entity ID	First Name	Last Name	Alert Type	Source
06/23/2017	55972	Sophia	Smith	Referral has been sent to a provider	MH
06/20/2017	56143	Kenny	Apple	Referral has been accepted	MH

Navigation

1. From the ACDHS Portal home screen: Click on .
2. From within MH Residential: The  button can be found at the top of every MH Residential screen.
3. Clicking on the MH Residential logo [] will navigate the user back to the ACDHS Portal home screen.

Basic List Elements



▼ Active Cases (2)

Search within Cases:

Case Date	Case ID	First Name	Last Name	Worker	Status
6/6/2017	1932	Sophia	Smith	Amy Wienand	Active
5/30/2017	1891	Susie	Strawberries	Amy Wienand	Active

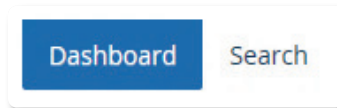
Show entries

First Previous 1 Next Last

- **Headers:** Identify what type of information can be found in the grid columns.
- **Sort Indicator:** [▲] This indicates what direction the Header in the grid is sorted in to. To sort the list on a specific Header, click on the desired *Header*. The sort indicator will point upward [▲] for ascending order or downward [▼] for descending order.
- **Hyperlinks:** Hyperlinks within the grid will open the item in the grid. Clicking on [1891](#) will open that Case.
- **Pagination:** Longer lists will be separated into pages. These pages can be navigated by using the **First Previous 1234 Next Last** links to the bottom-right of the grid. To the bottom-left of the grid is a drop-down option, **Show entries**, that allows users to change the number of grid entries displayed per page.
- **Search:** These search fields can filter the grid down to any grid item containing all or part of a word, date, or number.
 - ❖ The filter will only apply to text and numbers that are contained within the grid itself. For example: Typing "Sophia" will filter the list to all Cases with a client named Sophia.
 - ❖ This search also accepts partial entries. For example, typing "2017" will filter this list to include any Cases in 2017. Typing "Stra" will bring up all Cases with a client whose name begins with Stra such as *Susie Strawberries*.
 - ❖ To clear the search results, click the **X** that appears to the right inside the search field or delete the search terms.

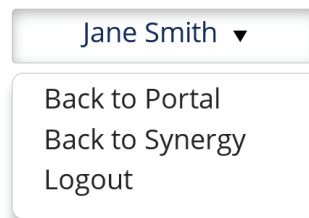


1. After clicking  on the ACDHS Portal home page, the user will be navigated directly to the MH Residential .
 - a. All of the panes on this screen will be closed by default. Use the chevrons [ ] to open and close the panes. The title of each pane also indicates the number of items contained in that pane in parenthesis, for example:  **Active Cases (5)**.
2. *Static Navigation Buttons:*



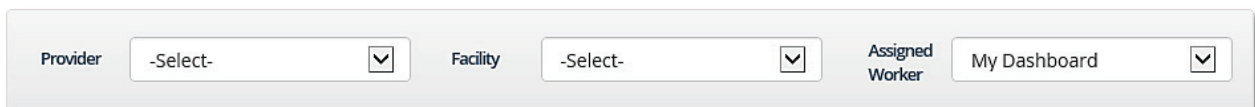
These navigation buttons will always be at the top of the screen and can be accessed from any screen in Synergy. Depending on the User's level of access there may be more or less options available.

3. *User Menu:* The name of the logged in user will be displayed here.



Clicking on the drop-down will give the user the options to go *Back to Portal*, *Back to Synergy*, or *Logout*. Note: Back to Synergy is for those users who also work in other Synergy applications.

4. *Provider, Facility, and Assigned Worker:*



- a. *Provider:* This drop-down will display the Provider affiliation of the logged in user.
- b. *Facility:* This drop-down will display the Facility where logged in user is assigned. If the user is assigned to more than one facility the user can select a specific facility from the drop-down.
- c. *Assigned Worker:* For all users except Managers and Supervisors, this drop-down will be locked to "My Dashboard" and will only show items assigned to the logged in user.
 - i. Managers, Supervisors, and internal DHS staff can select other users from the *Assigned Worker* drop-down to view those user's Dashboards. Selecting "All" from the drop-down will display information from all users' dashboards.



5. There may be several panes visible on the Dashboard, depending on the user's workload. If a particular pane does not have any entries for that user, that pane will not be visible on the dashboard. For example, if there are no alerts for the user the *Alerts* pane will not be visible. Possible panes include:
- Pending Referrals*: This pane contains new Referrals that have not yet been submitted.
 - Submitted Referrals*: This pane contains Referrals that have been submitted to DHS.
 - Active Referrals*: This pane contains Referrals that have been accepted for MH housing consideration (added to the Waitlist).
 - Accepted Pending Referrals*: This pane contains Referrals that have been matched with a specific MH Residential bed but the admission and move in process has not yet been complete.
 - Active Cases*: This pane contains Cases of clients who are currently in an MH Residential bed.
 - Shared Referrals* and *Shared Cases*: These panes contain Referrals or Cases that have been shared, in whole or in part, with the logged in user.
 - Alerts*: This pane contains notifications and reminders about Referrals and Cases.
 - Alerts can appear when:
 - A Referral has been accepted.
 - A Referral has been sent to a provider.
 - An accepted pending Referral is 3 or more days old and has had no scheduled interview documented.
 - An accepted pending Referral is 7 or more days old and has no anticipated move in date documented.
 - An anticipated move in date has expired.
 - A discharge date has been entered on a Case.
 - A Referral's quarterly/annual review is due.
 - Alerts will disappear once the reason for the alert has been remedied. For example, once a scheduled interview is documented the alert for a missing scheduled interview will disappear.



- iii. *Discharge Date Entered* alerts can be deleted by clicking the Delete Icon [] to the right of the alert in the *Alerts* grid.

Alert Date	Entity ID	First Name	Last Name	Alert Type	Source	
06/14/2017	56065	Brandon	Rabbit	Discharge date has been entered for a case	MH	

A *Confirm Delete* pop-up will appear:

Confirm Delete

Clicking on "Yes" button will delete this record.
Would you like to proceed?

Clicking will delete the alert.

Clicking will cancel the action and the alert will not be deleted.

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 iService, 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.