





INTRODUCTION:



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Introduction:

What are the Allegheny County DHS Portal and MH Residential applications?

The ACDHS Portal allows users to explore the housing options that Consumers may be eligible to apply for as well as resources that may be of assistance. Depending on a user's role in the system, the user can navigate on from the Portal into the MH Residential application. The MH Residential application is part of the Synergy suite of DHS Applications and provides a referral and case management platform for MH Residential providers and DHS staff.

How will I use the ACDHS Portal and MH Residential applications?

There are multiple internal DHS program offices and DHS provider agencies using Synergy based applications. Application usage can run the gamut from simply viewing and responding to online postings to documenting case notes, recording client data, storing case documents, completing assessments and plans, and managing entire caseloads. Each application is unique in its specific functions. This guide will walk through elements that are common to the ACDHS Portal and the MH Residential application.





ACDHS Portal

Logging In

Sign in with your Allegheny County ID
User Id
Password
Sign In Continue as Guest Password Self-Service
Disclaimer : You are about to enter the private network of Allegheny County. All information on this site is confidential. Access is limited to persons with user identification assigned by Allegheny County. Unauthorized access to this system or unauthorized use of the information contained therein is a violation of County, State and Federal Laws, and will be punished to the full extent of the law.

Navigate to the Allegheny County DHS Portal using Microsoft Internet Explorer e or Google Chrome . (The Portal is <u>NOT</u> compatible with Microsoft's Edge browser.)

https://acdhsportal.alleghenycounty.us

- Log in using your Login ID and Password. Your user credentials are assigned by the Department of Human Services Service Desk and will start with a T, K, or X.
 - Password Self-Service can be used to reset your password if it has expired or if you have forgotten it.
- > Click Sign In
 - You will then be taken to the ACDHS Portal home page.
 - If you have multiple roles in the system you will see a list of your roles before the home page appears. To select a specific role, click ^{Go} to the right of that role to continue.



ACDHS Portal Home Page

ACDHS Portal DEPARTMENT OF HUMAN SERVICES ALLEGHENY COUNTY, PA		
View Dashboard View your Dashboard to see your referrals. View Dashboard	Housing Eligibility Determine what housing programs an individual may be eligible for. Check Eligibility <u>Continue with LTSR Referral</u>	Jane Smith •
Search Search all referrals and cases. Search		

- > The **ACDHS Portal Home Page** contains a variety of navigation options including:
 - Housing Eligibility: This allows users to enter information about an individual to determine their eligibility across a variety of housing programs.

Click Check Eligibility to start.

- See the <u>Housing Eligibility & Referrals ACDHS Portal Job Aid</u> for an in-depth look at the *Housing Eligibility* screens.
- View Dashboard: This link will take you to your dashboard within the MH Residential application. The Dashboard will allow you to review your assignments, referrals and alerts.

Click View Dashboard to start.

- See the <u>My Dashboard MH Residential Job Aid</u> for an in-depth look at the Dashboard screen.
- Search: This link will take you to the primary search screen within the MH Residential application.

Click Search to start.

- See the <u>Search MH Residential Job Aid</u> for an in-depth look at the Search screen.
- Other Navigation Tiles: Depending on what your role is, you may also see additional Navigation Tiles such as View Waitlist, Manage Housing Inventory and Manage Meetings. These will navigate you to those specific pages within the MH Residential Application.





MH Residential: Navigation & Elements

		Vavigation Buttons	Dashboard Search	Jane Smith 🗸	Session Time out in 29:31
Navigation Tiles	RESIDENTIAL		User Menu ⁴	Session Time	e Out Counter
← Case Information	♥ Case Summary				
Summary >	*Denotes Required Fields ** Den	otes Half Mandatory Fields C	trl + Click to Multi-Select and Deselect		
Individual Info	Placement Date	Case Status *	Provider Agency	Assigned Worker *	
Referral Info	Case ID	Priority Category *	Estimated Discha	rge Date	
Daily Living	Bed Information	Individuals living in t	18 cont		
Treatment History	COMMUNITY HUMAN SERVICES	CORPORATION - CHS - 372 L	WIN STREET - DOM CARE-372 Lown	#10	
Risk Factors	Save Tran	Isfer			
Legal History	♥ Next Steps				
Document Folder		Review Individual	Star Ba	eferrals	Pana
Case Notes					Pane
> Utilities			Exit Case		
Chevrons					J

Static Navigation Buttons

- These Navigation Buttons will always be at the top of the screen and can be accessed from any screen in MH Residential. Depending on your level of access you may see more or less options here.
- > These buttons will turn blue to indicate what screen you are on:



Session Time Out Counter

This counter indicates how much time is left before the application automatically logs you out. This timer will reset when you navigate between pages or save items.

Session Time out in 29:31





User Menu

- > This will display the name of the user who is logged in.
- > Click on the down arrow [▼] to the right of your name to open the User Menu:



- Select "Back to Portal" to return to the ACDHS Portal Home Screen.
- If, as part of other job duties, you have been given access to other applications select "Back to Synergy" to go to the Synergy Splash screen and navigate to other Synergy applications.

Chevrons

Chevrons can be used to open and close Navigation Tiles and Panes.

⋗

- Closed Chevron:
- Open Chevron:

Navigation Tiles

- > Click on a Navigation Tile to open that menu and access the screens within it.
- If the closed chevron [) is to the left of a tile, this indicates that clicking on this tile will reveal more sub-tiles below it.

>	Case Information	

➢ If the closed chevron [▶] is to the right of the tile, this indicates that there are no more tiles to access using this menu.

Summary	>

Navigation tiles show the navigation path to the current screen. For example, the tiles here indicate that you have accessed the Summary screen within Case Information:

 Case Information 	n
Summary	>





Panes

- > Panes are smaller windows within the screen being viewed.
- > Panes can be opened or closed using chevrons.

 Pending Refe 	errals (2)						
				Search	vithin Referrals:		
Referral Date	🖕 Referral ID	🖕 First Name	🖕 Last Name	🛓 Referred By	🛓 Source	🖞 Worker	🙏 Status
6/28/2017	<u>56169</u>	Burt	Brown	Amy Wienand	MH	Amy Wienand	Pending
5/10/2017	<u>55770</u>	Sheldon	Cats	Amy Wienand	МН	Amy Wienand	Pending

Shortcuts and Links

Throughout the applications there will be shortcuts and links that will allow you to navigate through the system. Your cursor will turn into a hand [^b] when hovering over a link or shortcut.

Referral/Case Summary Pane

- > The top Pane in each screen will be a Summary Pane
- > This Pane contains basic information about the Referral or Case currently being viewed/worked in.

Denotes Required Fields **Denotes				
Referral Date *	Referral Status *	Referral ID	Priority Cate	gory *
	-Select-	105540	N	one selected 🗸
Provider	Facility/Unit	Assigned Worker	Readiness	evel*
-Select-	-Select-	-Select-	-Select-	~
Readiness Date	Readiness Level 2 Reason	Other, please specify		
	-Select-			
				Print Referral Summan
Case Summary Denotes Required Fields ** De	notes Half Mandatory Fields Ctrl + Ct	lick to Multi-Select and Deselect		Print Referral Summar
Case Summary Denotes Required Fields ** De Placement Date	notes Half Mandatory Fields <i>Ctrl + Ct</i>	lick to Multi-Select and Deselect	Assigned	Print Referral Summary
Case Summary Denotes Required Fields ** De Placement Date	notes Half Mandatory Fields Ctrl + C Case Status * -Select-	lick to Multi-Select and Deselect Provider Agency	Assigned Select-	Print Referral Summary Norker *
Case Summary Denotes Required Fields ** De Placement Date CaseID	notes Half Mandatory Fields Ctrl + Ct Case Status * -Select- Priority Category	lick to Multi-Select and Deselect Provider Agency Estimated Disch	Assigned -Select- arge Date	Print Referral Summar Norker *
Case Summary Denotes Required Fields ** De Placement Date CaseID	notes Half Mandatory Fields Ctrl + Ct Case Status * -Select- Priority Category -Select-	ick to Multi-Select and Deselect Provider Agency Estimated Disch	Assigned Select- arge Date	Print Referral Summary Norker *
Case Summary Denotes Required Fields ** De Placement Date Case ID Bed Information	notes Half Mandatory Fields Ctrl + Ct Case Status * -Select- Priority Category -Select-	ick to Multi-Select and Deselect Provider Agency Estimated Disch	Assigned Select- arge Date	Print Referral Summary Worker *





Grids & Lists

4	Sort Indicator			Search within Cases.	
Case Date	Case ID	🖕 First Name	🖕 Last Name	🖕 Worker	🗧 Status 👌 Heade
6/6/2017	<u>1932</u>	Sophia	Smith	Amy Wienand	Active
5/30/2017	<u>1891</u>	Susie	Strawberries	Amy Wienand	Active
Show 10 🔽 e	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 that Header's text. 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 <u>1891</u> 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 10 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.





Common Screen Elements

Fields & Drop-downs

Case Summary *Denotes Required Fields ** D	Denotes Half Mandatory Fields G	trl + Click to Multi-Select and Dese	elect Drop-Downs
Placement Date	Case Status *	Provider Agency	Assigned Wolker *
Case ID	Priority Category *	Estimated	Discharge Date
Bed Information	CES 201000000 CUST CIMUED SI	Recursion Record 2	Fields
Save Transfe	View/Add Suspension De	etails	

Fields

- > A field is an area where data has been or can be entered.
- White fields can be edited. (Example: Estimated Discharge Date)
- Greyed out fields cannot be edited. (Example: Bed Information)
 - If you move your mouse over a greyed-out field the read-only symbol [\bigcirc] will appear.

Drop-downs

- > A drop down is a list of options that items can be selected from.
- White drop-downs can be edited. (Example: Provider Agency)
- Greyed out drop-downs cannot be edited. (Example: Assigned Worker)
 - ✤ If you move your mouse over a greyed out drop-down the read-only symbol [○] will appear.

Radio Buttons & Checkboxes

- Radio buttons and checkboxes can be selected by clicking in the circle or box.
 - Radio Buttons are round and signal that only one item can be selected.



Checkboxes are square and can signal that multiple items may be selected.







Narrative Text Fields & Zoom-Boxes

> Narrative text fields allow a larger amount of data to be entered.

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- > To open the zoom-box click on the Magnifying Glass Icon [\checkmark] above the top-right corner of the Narrative field.
 - The narrative field's text can be edited within the field itself or from within the zoom-box.
 - The zoom-box contains a spell check function as well.
 - Some zoom-boxes will also contain a counter with the number of characters left for the narrative text field.

Enter Text	×
Spell Text	
Characters Left 2000	
OK Cancel Spell Check	

Tabs

- > Tabs indicate that there are multiple screen layers on top of each other.
 - These are accessed by clicking on the desired tab to bring information to the top of the stack.
- > The tab selected and currently displayed will have grey text and an outline.

Does	s the applicant currently have	e a criminal jus	stice oversight? *				Yes		~
Å V	Type of Oversight	Å V	Worker's Name	Å V	Worker's Phone#	÷	Source		
								1	
Show	10 🗸 entries					First	Previous 1	Next	Last





Buttons

- Buttons can indicate actions that can be taken, for example:
- Buttons can open pop-up windows, for example:
- Dark blue buttons are active and clickable. Light blue buttons are inactive and cannot be clicked, for example:

Save Print Referral Summary New

Mandatory Fields

- Mandatory fields are marked with a red asterisk *.
- > Mandatory fields must be filled out in order to save a screen or move on to the next screen.

case status	
Active	\checkmark

Half-Mandatory Fields

- > Half-Mandatory fields are marked with double red asterisks ****** and are always two or more fields.
- You will not be able to save the screen and move on to the next screen without at least one of the fields being completed.

MultiSelect Drop-Downs

- Multiple items can be selected from both MultiSelect boxes and MultiSelect drop downs.
- MultiSelect drop-downs have check boxes next to each item in the drop down. Select the desired items by clicking on the check boxes to the left of the item.
- If more than one item is selected, the selected items can be read without opening the drop-down by hovering your mouse over the drop down.







 \mathbf{X}

Status Indicators

- > The indicators next to fields and Referral Navigation Tiles indicate:
 - The field/screen is Mandatory but has not been completed:
 - The field/screen is Optional but has not been completed/edited:
 - The field/screen has been completed/edited:

Date & Time Fields

You can enter a date by typing the date into the field using the *mm/dd/yyyy* format or by clicking on the date field and clicking the date from the calendar that opens.

mm/dd/yyyy ×					<	
« Su	S Mo	epte Tu	mber We	2017 Th	7 Fr	» Sa
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
1	2	3	4	5	6	7

- Use the <<>> arrows to either side of the month change the month in the calendar.
- Enter a time by clicking in the field and typing using the *hh:mm* format. At the end of the time field you will see *xm*. Type "a" or "p" to change this to am or pm.

h:mm xm

Historical Information

Some fields may have the History Icon [Θ] to display the history of changes to a specific field. Clicking on this icon will open a *History* pop-up with this information in a grid.





Timing Out

- > After 60 minutes of inactivity in the application, the screen will time out.
- > If the session has timed out, any unsaved information will be lost.
- Any action that causes the screen to refresh (such as saving or navigating to a different screen or tab) will reset the Session Time Out Counter.

Session Time out in 29:31

If you are close to timing out of the application, you will receive a pop-up message warning you that your session is about to expire.

1	Your session is	about to expire!
	You will be logged seconds.	l out in 31
	Do you want to st	ay signed in?
Yes, K	eep me signed in	No, Sign me out

While the applications have a time out length of 60 minutes, Internet Explorer and Chrome may close your session sooner depending on what version of the browser you are using.

Logging out

> To log out, click the User Menu in the upper-right corner of the screen and select "Logout".

Jane Smith 🔻
Back to Portal
Back to Synergy
Logout





ACDHS Portal & MH Residential Assistance

- Contacting the Allegheny County Service Desk:
 - By email: <u>ServiceDesk@AlleghenyCounty.US</u>
 - ✤ By phone: 412-350-HELP (4 3 5 7), select option 2 for DHS.
- > To access iService go to: <u>https://ServiceDesk.AlleghenyCounty.US</u>
- External Users can find this and other Job Aids at: <u>http://s3.amazonaws.com/dhs-application-support/index.htm</u>
- Internal DHS Users can find this and other Job Aids at: <u>http://dhsassist.dhs.allegheny.local</u>