



Case Information – Summary – YSP Job Aid

The Case 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 where a supervisor or manager can: close a case, change an assignment category, or change the assigned worker.

Case Summary Screen

The screenshot shows the 'Case Summary' screen. At the top, there's a header with the 'Youth Support Partner Unit' logo, 'Dashboard' and 'Search' links, and buttons for 'Case Contact-Quick Entry' and 'Amber Knight'. A left sidebar contains a menu with 'Case Information' (expanded), 'Summary' (selected), 'Household', 'Additional Info', 'Involvement', 'Supports', 'Tracking', 'Additional Information', and 'Utilities'. The main content area has a 'Case Summary' section with a 'Program: Youth Support Partners' label. Below this is a form with fields for 'Case ID' (84), 'Case Name' (November), 'Case Status' (Open), 'Case Open Date' (11/23/2015), 'Assignment Category' (General), and 'Assigned Worker' (Amber Knight). A 'Save' button is below the Case ID field. Below the 'Case Summary' section is a 'Next Steps' section with five buttons: 'Review Household', 'Review Involvement', 'Add Contact', 'View Case Plan', and 'Exit Case'.

Accessing the Summary Screen

1. **Summary** can be found under **Case Information** and can be accessed several ways:
 - a. From the *Dashboard*: Locate the desired case and click on the *Case ID*. The **Summary** pane opens automatically.
 - i. Clicking on the the *Case ID* in any grid will navigate the user to the **Summary** screen.
 - b. Navigating from within the case:
 - i. **Case Information** → **Summary**



Case Summary pane


▼ Case Summary

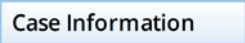
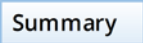

*Denotes Required Fields **Denotes Half Mandatory Fields Ctrl + Click to Multi-Select and Deselect

Program: Youth Support Partners

Case ID	Case Name *	Case Status *	Case Open Date	Assignment Category	Assigned Worker
84	November	Open ▼	11/23/2015	General ▼	Amber Knigl ▼

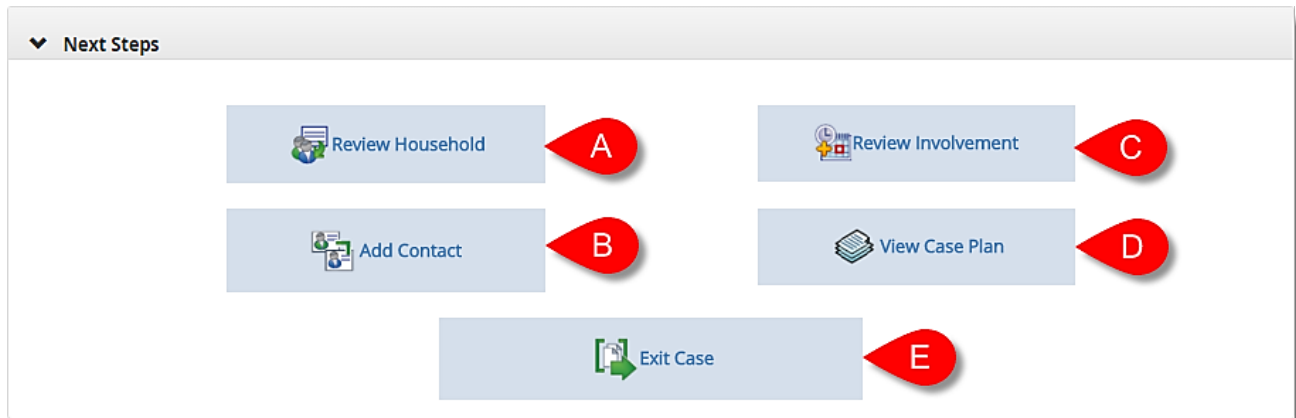
Save

1. The Program displays the name of the program that this *Case ID* is assigned to.
2. The Case Summary Pane contains the following fields:
 - a. *Case ID* – This is the YSP case number for this case and is not editable.
 - b. *Case Name* – This is the YSP case name for this case and can be edited by the assigned worker, supervisor, or manager.
 - c. *Case Status* – This drop-down displays the status of Open or Closed. A Supervisor or Manager can update this status to close the case.
 - d. *Case Open Date* – This displays the most recent date that the case was opened with YSP and is not editable.
 - e. *Assignment Category* – This displays the type of YSP case and can be updated by a Supervisor or Manager. The Assignment Category options are: *General*, *HFW-CYF*, *HFW-JPT*, *INDLV*, *ISP/PRT/Special*, *Kinship*, *Other*, and *TLFR*.
 - f. *Assigned Worker* – This displays the name of the worker assigned to the case and can be changed by a Supervisor or Manager.
3. After making any changes to the *Case Summary* pane the user must click the  button inside the *Case Summary* pane in order to preserve the updated information.






The  →  →  pane is the **ONLY** place where the *Case Status* can be changed to **CLOSED**.



Next Steps pane



1. The Next Steps pane contains quick link buttons to the most commonly used case screens.

- a.  Review Household opens the *Case Information* → *Household* screen.
- b.  Add Contact opens the *Tracking* → *Contacts* screen.
- c.  Review Involvement opens the *Case Information* → *Involvement* screen.
- d.  View Case Plan opens the *Tracking* → *Plans* screen.
- e.  Exit Case takes the user back to the *Dashboard*.

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>