



Case: Recommendations – YSP Job Aid

The *Recommendations* screen displays possible connections between the Youth on the Case and other DHS system/program involvements. If appropriate, these Cases can be associated within Synergy. KIDS associations are automatically made when the Youth's MCI ID is the same in KIDS and YSP – Synergy.

Recommendations

System Recommendations

Listed below are other program/system involvements of the household member associated to this case.
It is recommended that the case details are reviewed and associated for other DHS staff to be aware and better serve the client.

HH Member	Relation	Case Name	Case ID	Case Date	System	View Details	Action
October November	Self (Youth)	Smith	111111	5/13/2013	KIDS		<button>Associated</button>
		Smith	241	7/28/2017	HCM		<button>Disassociate</button>

Add Case

Case ID *

System *

-Select-

Associate

Navigation

- From the **Dashboard**: Locate the desired Case and click on the *Case ID* to bring the Case into focus.
 - Click on the **Tracking** tile. Then click on the **Recommendations** tile.

System Recommendations

1. **System Recommendations**: This pane lists other program/system involvements of the Household Members associated to this Case. It is recommended that the Case Details are reviewed and associated for other DHS staff to be aware and better serve the individual.

System Recommendations

Listed below are other program/system involvements of the household member associated to this case. It is recommended that the case details are reviewed and associated for other DHS staff to be aware and better serve the client.

A

HH Member

Relation

October November

Self (Youth)

B

Case Name	Case ID	Case Date	System	View Details	Action
Smith	11111	5/13/2013	KIDS		Associated
Smith	241	7/28/2017	HCM		Disassociate

Add Case

Case ID *

System *

-Select-

Associate

C

D

- a. The Household Member (*HH Member*) with other DHS System/Program involvements will be displayed here.
- b. The list of other Cases where the identified household member is involved will be listed here. This connection is based on MCI ID.
 - i. This grid will list the *Case Name*, *Case ID*, *Case (open) Date*, and *System*.
 - ii. The Connected Symbol [] in the *System* column indicates that this Case is connected and information is being shared. Information on this Case can be viewed by clicking the View Details Icon [] which will open a *Case Summary* pop-up for review.
- c. After reviewing the Case Summary details the user can choose to associate the Cases by clicking the **Associate** button in the *Action* column of the grid.
 - i. If a Case has already been associated the **Associated** button will be displayed in the *Action* column for workers.



- ii. Supervisors and Managers will have the **Disassociate** button instead which allows the Supervisor/Manager to disconnect the Case.

A confirmation pop-up will appear when **Disassociate** is clicked:

A confirmation pop-up titled "Disassociate Case?" with two buttons: "Yes" and "No".

Clicking **Yes** will disconnect the Cases.

Clicking **No** will close the pop-up without disconnecting the Cases.

- d. **▼ Add Case**: This pane allows users to manually associate a Case from another application within Synergy.

The "Add Case" pane contains a "Case ID *" text input field, a "System *" dropdown menu with "-Select-" selected, and an "Associate" button.

- i. *Case ID*: Enter the Case ID for the Case that will be associated.

- ii. *System*: Select from the drop-down the Synergy application where the Case that will be associated resides.

- iii. Click **Associate** to connect the Cases.

A confirmation pop-up will appear when **Associate** is clicked:

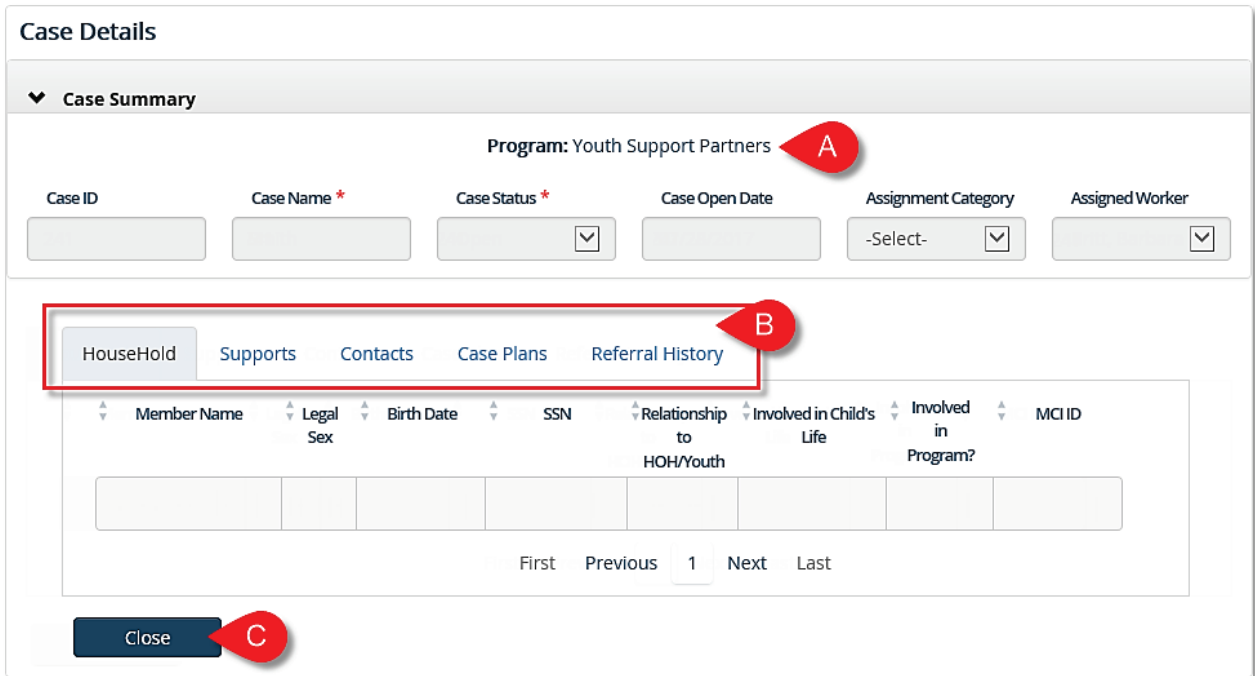
A confirmation pop-up titled "Associate Case?" with two buttons: "Yes" and "No".

Clicking **Yes** will connect the Cases.

Clicking **No** will close the pop-up without connecting the Cases.



2. The *Case Summary* pop-up displays some limited information on the Case. To open, click the View Details Icon [] :



- a. The *Program* will be listed at the top of the pop-up. Depending on the program different information may be captured in the top section of the *Case Summary* pop-up.
- b. Click on each tab to view information on the Case.
- i. *Household*: contains a list of the individuals in the Case's Household.
 - ii. *Supports*: Contains a list of the active Supports on the Case.
 - iii. *Contacts*: Displays a list of contacts but does not allow the contacts to be opened and viewed.
 - iv. *Case Plans*: Contains a list of the Case Plans.
 - v. *Referral History*: Contains a list of prior Referrals for this Case.
- c. Click  to close the pop-up.

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.