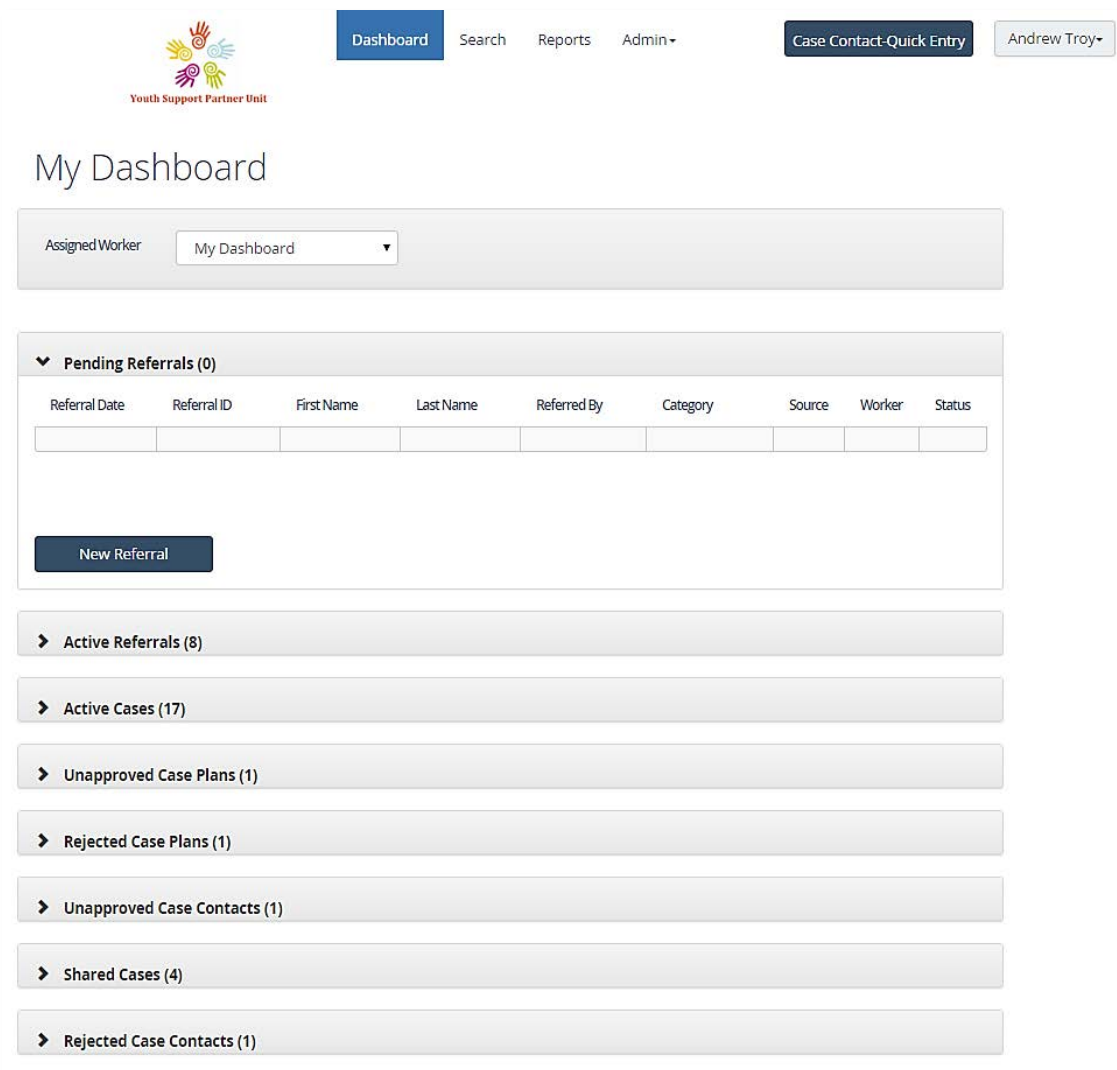




## My Dashboard – YSP Job Aid

The Dashboard is the first screen that appears after logging into the YSP application. This screen allows workers to access their Cases and Referrals as well as any Contacts or Plans that have been rejected by a Supervisor or Manager. Supervisors and Managers can also access Contacts and Plans that have been sent to them for approval.

### My Dashboard



The screenshot shows the 'My Dashboard' interface. At the top, there is a navigation bar with buttons for 'Dashboard', 'Search', 'Reports', and 'Admin'. On the right, there is a 'Case Contact-Quick Entry' button and a user profile for 'Andrew Troy'. Below the navigation bar, the 'Youth Support Partner Unit' logo is displayed. The main heading is 'My Dashboard'. Below this, there is a section for 'Assigned Worker' with a dropdown menu currently set to 'My Dashboard'. The main content area is divided into several sections. The first section is 'Pending Referrals (0)', which contains a table with columns: Referral Date, Referral ID, First Name, Last Name, Referred By, Category, Source, Worker, and Status. Below the table is a 'New Referral' button. The second section is 'Active Referrals (8)', followed by 'Active Cases (17)', 'Unapproved Case Plans (1)', 'Rejected Case Plans (1)', 'Unapproved Case Contacts (1)', 'Shared Cases (4)', and 'Rejected Case Contacts (1)'. Each of these sections has a right-pointing arrow icon.

### Accessing My Dashboard

1. The **Dashboard** is one of the Static Navigation Buttons that can be found at the top of every YSP screen.



## Navigating through My Dashboard

### My Dashboard

Assigned Worker My Dashboard **A**

**B** **▼ Pending Referrals (0)**

Referral Date	Referral ID	First Name	Last Name	Referred By	Category	Source	Worker	Status

**New Referral**

**C** **➤ Active Referrals (8)**

**D** **➤ Active Cases (17)**



**E** **➤ Unapproved Case Plans (1)**

**F** **➤ Rejected Case Plans (1)**

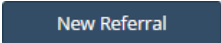

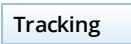
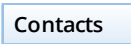

**G** **➤ Unapproved Case Contacts (1)**

**H** **➤ Shared Cases (4)**

**I** **➤ Rejected Case Contacts (1)**

1. After selecting Youth Support Partners on the Synergy Splash screen the user will be taken directly to the **Dashboard**. All of the panes on this screen default to being closed. Use the Chevrons [   ] to open and close the panes. The title of each pane contains the number of items listed in the pane in parentheses.
  - a. *Assigned Worker*: For workers this drop-down will be locked to “My Dashboard” and will only show information about Referrals and Cases assigned to that worker.
    - i. Supervisors and Managers can select another worker from this drop-down to view that worker’s **Dashboard**.



- b. *Pending Referrals* is where all of the YSP referrals that have not yet been processed reside. Only YSP Managers will be able to view Pending Referrals and use the  button.
  - c. *Active Referrals* displays all the user's referrals with a status of "Assigned" or "In Progress".
  - d. *Active Cases* displays all of the user's currently active cases. The user can navigate to a Case by clicking on the *Case ID* in the grid. Clicking on the Contacts Icon [  ] will navigate the user directly to  → .
  - e. *Unapproved Case Plans* contains Case Plans sent to the Supervisor for approval. This pane is only viewable by YSP Supervisors and Managers. The YSP Supervisor/Manager will open this pane to review and approve or reject the Case Plans sent to them by the YSP workers.
  - f. *Rejected Case Plans* contains Case Plans that have been rejected by the YSP Supervisor or Manager and sent back to the worker to correct and re-submit for approval.
  - g. *Unapproved Case Contacts* contains Case Contacts sent to the Supervisor for approval. This pane is only viewable by YSP Supervisors and Managers. The YSP Supervisor/Manager will open this pane to review and approve or reject the Case Contacts sent to them by the YSP workers.
  - h. *Shared Cases* contains Cases that have been partially or fully shared with the user.
  - i. *Rejected Case Contacts* contains Case Contacts that have been rejected by the YSP Supervisor or Manager and sent back to the worker to correct and re-submit for approval.
2. Every  pane contains a **Search within...** field from which the fields can filter the grid down to any grid item containing all or part of a word, date, or number.

### For more information...

For assistance, please contact the Allegheny County Service Desk at [ServiceDesk@AlleghenyCounty.US](mailto: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>