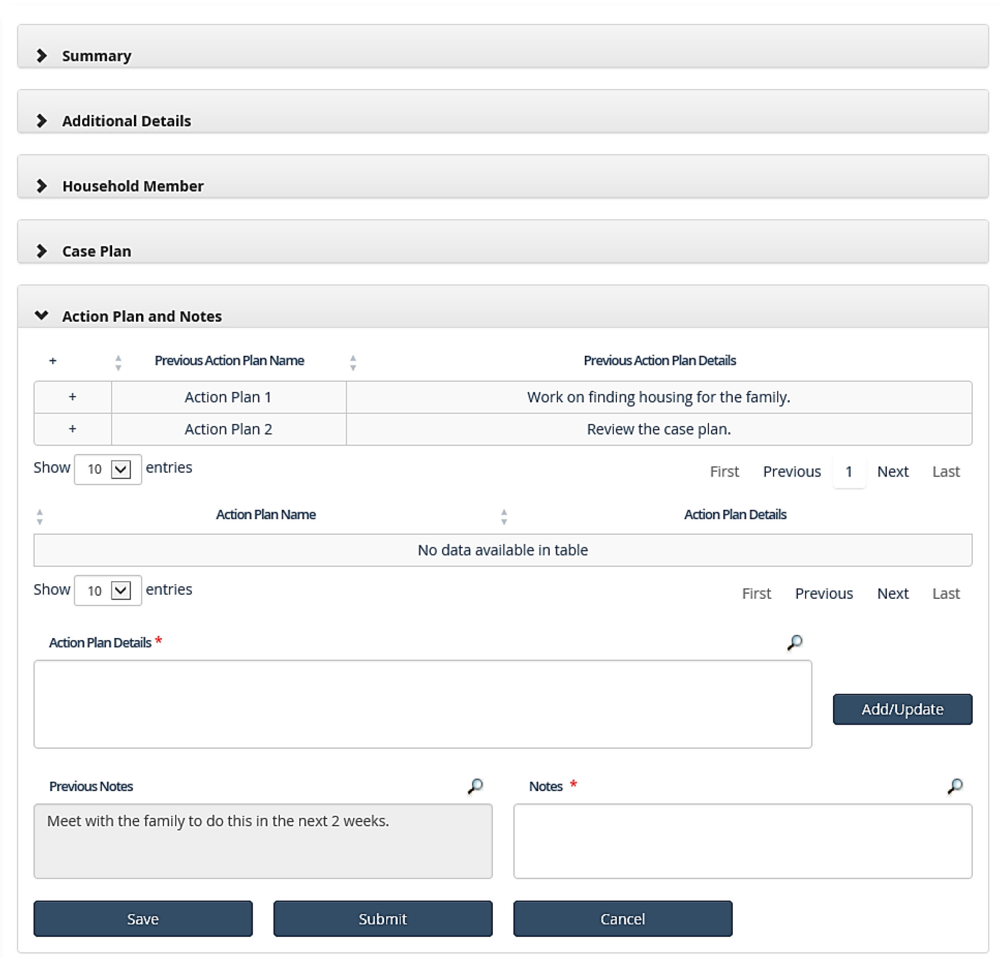
Supervisor Log – YSP Job Aid

The *Supervisor Log* screen is intended to help supervisors and staff serve clients more effectively and maintain compliance through regular Supervision reviews of important Case information and the creation of worker Action Plans. Workers can view but cannot edit this screen.

Supervisor Log

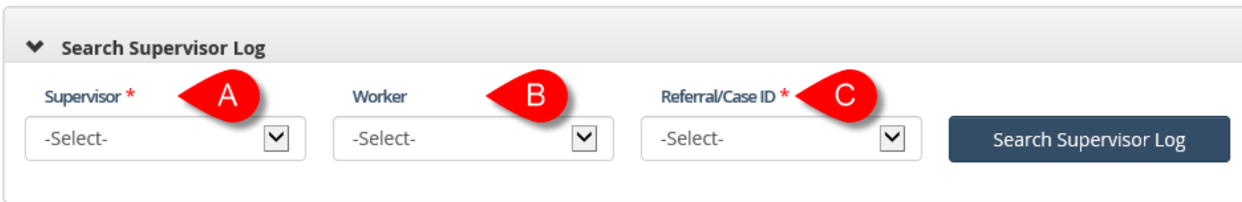


Navigation

1. From the Dashboard (Supervisors and Management only):
    a. Click on the Supervisor Log button above the Dashboard panes.
2. Locate the desired Case and click on the *Case ID* to bring the Case into focus.
    a. Click on the Supervisor Log tile. Then click on the Supervisor Log tile.

Search Supervisor Log

1. Supervisors and Management can search through and access Supervisor Logs for any worker by clicking on the **Supervisor Log** button above the Dashboard.
   This opens the **Search Supervisor Log** pane:



   a. *Supervisor*: Managers can select a specific supervisor from the drop-down. Supervisors will see their own name selected automatically.

   b. *Worker*: Select a specific worker from the drop-down.

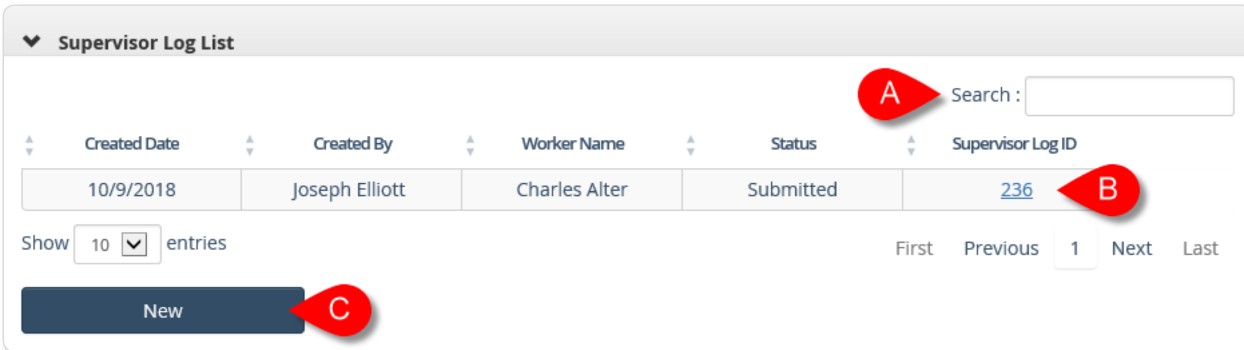
   c. *Referral/Case ID*: Once a specific worker is selected, that worker's Cases will be displayed in the Referral/Case ID drop-down. Select a specific case and click **Search Supervisor Log**.

2. Once the **Search Supervisor Log** button is clicked all of the Supervisor Logs for the selected Case will be displayed in the **Supervisor Log List** pane.

3. The **Supervisor Log List** pane can be accessed via the **Supervisor Log** Dashboard button or from within the Case itself by clicking on the **Supervisor Log** tile and then clicking on the **Supervisor Log** tile.

Supervisor Log List

1. Supervisor Log List pane:



   a. *Search*: This field allows the user to filter the grid down to specific log(s).

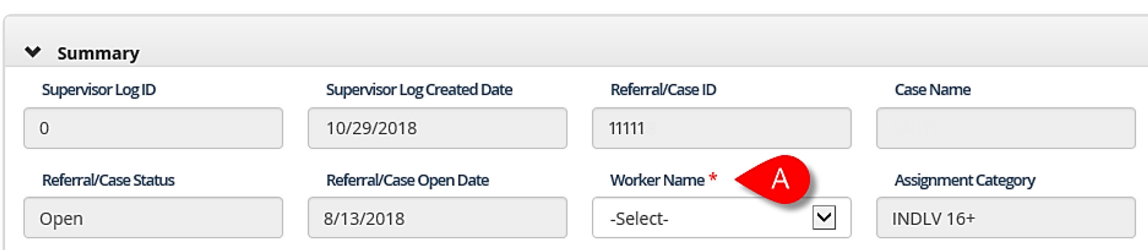
   b. *Supervisor Log ID*: Click on the ID to navigate directly to that specific Supervisor Log.

   c. *New*: Click the New button to start a new Log.
   If there is a Supervisor Log that is still in draft status the New button will be inactive. The last Supervisor Log must be Submitted before a new one can be created.

> **NOTE:** *All Supervisor Logs must be submitted before a case can be closed. A Supervisor Log with a status of "Draft" will prevent case closure.*

Supervisor Log – Summary Pane

1. Summary pane: This pane displays basic information about the Case.



   a. *Worker Name*: From the drop-down, select the assigned worker who will be completing the Action Plan that is detailed in this Supervisor Log.

Supervisor Log – Informational Panes

1. **Additional Details** pane: This pane displays all the Referrals connected to this Case.

Additional Details

Referral Date	Referral ID	Referred By	Assigned Worker
05/10/2018	111111	Miranda Miller	Miranda Miller
05/10/2018	111112	Miranda Miller	Miranda Miller

Show 10 entries   First Previous 1 Next Last

2. **Household Member** pane: This pane displays all the active Household Members on this Case and includes the Household Member's *Address*, *Phone*, and *Gender and Sexuality* information.

Household Member

Member Name	Legal Sex	Birth Date	Preferred Name	SOGIE Complete	MCI ID or Client ID
John Doe (A)	Male	02/10/1981		No	1111111111

Show 10 entries   First Previous 1 Next Last

Address | Phone | Gender and Sexuality (B)

Address Type	Address Summary	Primary Address	Validated?
Business	1234 Main St Pittsburgh, PA	No	Yes

Show 10 entries   First Previous 1 Next Last

   a. To view a specific Household Member's information, click on that individual in the *Household Member* grid.

   b. The **Address** tab is displayed first by default. To view the *Phone* or *Gender and Sexuality* information for the selected individual, click on the **Phone** or **Gender & Sexuality** tabs.

3. **Case Plan** pane: This pane displays a list of the Case Plans and/or STAN Plans.
NOTE: Only the latest uploaded STAN Plan will appear. In order to be displayed here STAN Plans must be uploaded in the **Document Folder** screen and must have a D*ocument Date* entered as well as a *Record Type* of "YSP STAN Plan"

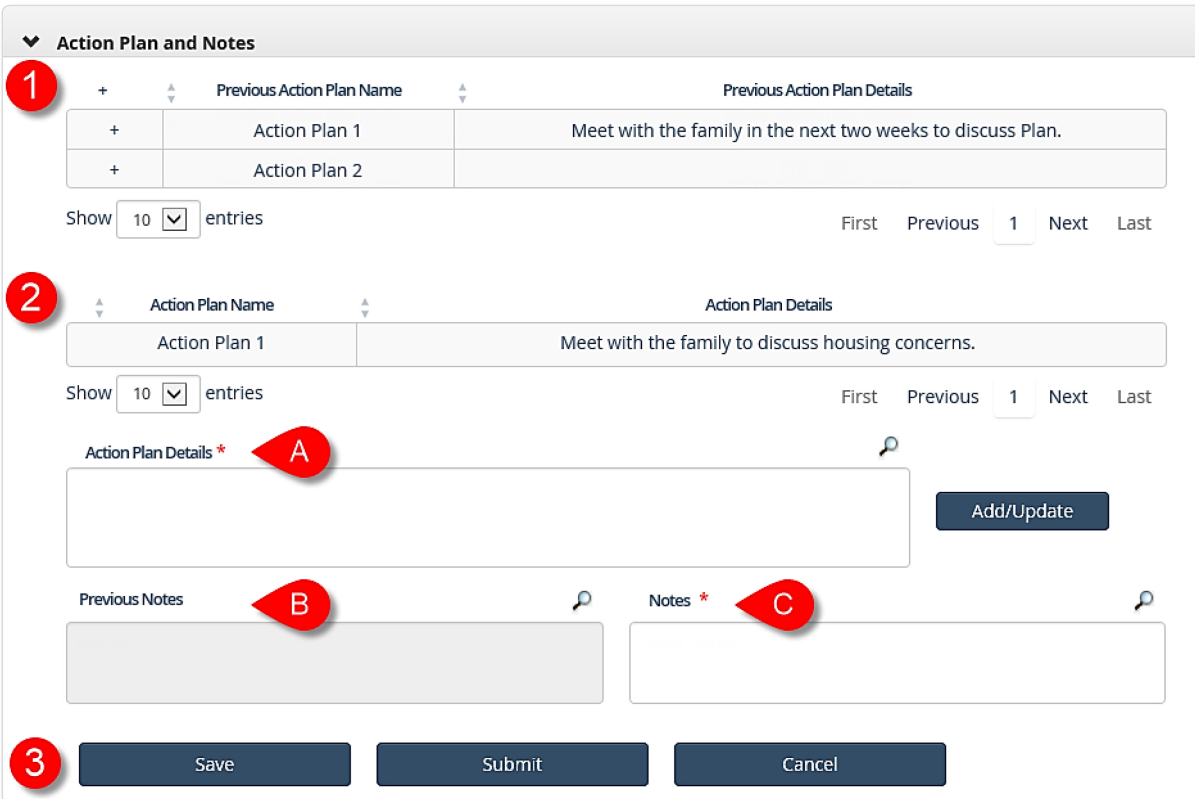
Case Plan

Plan Name	Plan Start Date	Next Plan Date	Plan Entered Date	Plan Entered By	Status
A	07/03/2018	07/03/2019	07/17/2018	X000000	Final

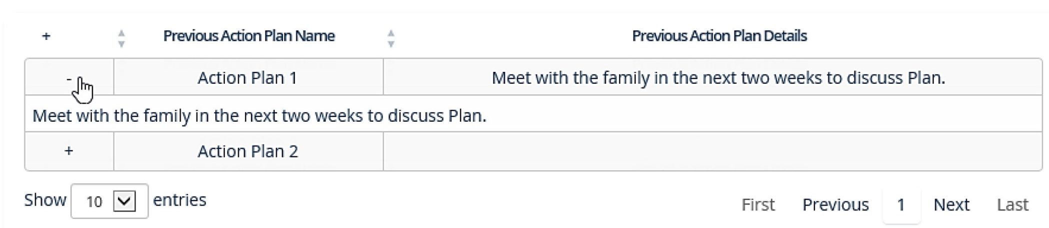
File Name	Description	Record Type	Document Date	Uploaded Date	Uploaded By	Document ID	Client
YSP STAN Plan.docx	Stan Plan	YSP STAN Plan	10/1/2018	10/29/2018	Caldwell , James	1	

Completing the Action Plan and Notes Pane

Action Plan and Notes pane: Supervisors can use this pane to document the next actions for the Worker to take as well as any relevant notes. ***Reminder:*** A Worker must be selected from the *Worker Name* drop-down in the Summary pane before an Action Plan can be saved.

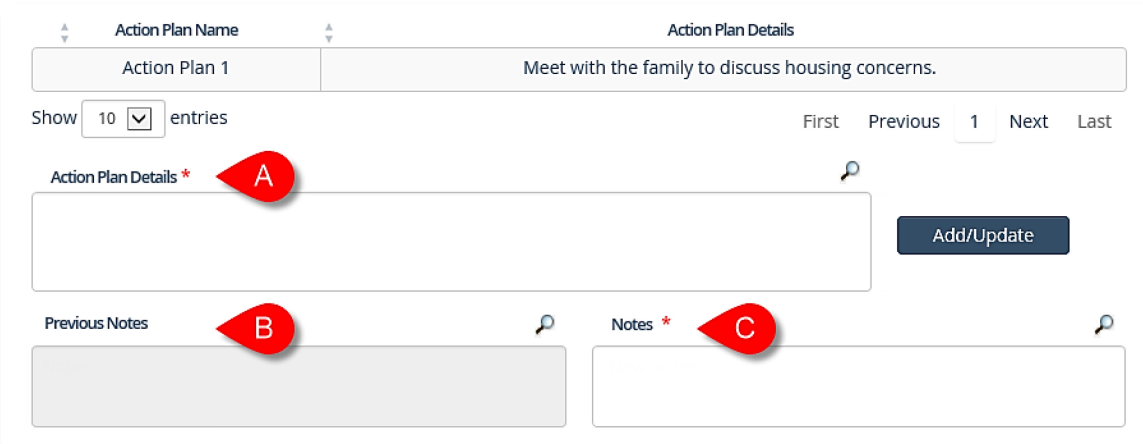


1. Previous Action Plans: If previous Action Plans have been submitted, the prior plans will be visible in the Previous Action Plan grid. To view the details of a specific Action Plan, click on the [**+**] to the left of the Action Plan in the grid. To close the expanded view, click on the [**-**] that now appears to the left of that Action Plan in the grid.



To view the *Action Plan Details* for all of the Action Plans in the current page of the grid, click on the [**+**] above the grid. To collapse all of the *Action Plan Details*, click on the [**-**] that now appears above the grid.

2. Documenting an Action Plan:



   a. *Action Plan Details*: Enter the details of the Action Plan in the narrative text box. Click Add/Update to add the entry to the *Action Plan* grid.
      i. To edit an existing entry, click on the desired entry in the *Action Plan* grid, update the *Action Plan Details* and click Add/Update.

   b. *Previous Notes*: The notes from the last submitted Action Plan will appear here and will be read-only.

   c. *Notes*: Enter any relevant notes here. These notes apply to the group of current action plans as a whole and are not specific to a single Action Plan entry.

3. Save, Submit, and Cancel:
   a. To save the current entries in Draft form, click Save. Action Plans in Draft status can be edited.
   b. To finalize the Action Plan, click Submit. Action Plans are not editable after they have been submitted.
   c. Clicking Cancel will navigate back to the *Action Plan List*, any unsaved information will be lost.

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