



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

Summary

Additional Details

Household Member

Case Plan

Action Plan and Notes

+

Previous Action Plan Name

Previous Action Plan Details

+	Action Plan 1	Work on finding housing for the family.
+	Action Plan 2	Review the case plan.

Show 10 entries

FirstPrevious1NextLast

+

Action Plan Name

Action Plan Details

No data available in table

Show 10 entries

FirstPreviousNextLast

Action Plan Details *

Add/Update

Previous Notes

Meet with the family to do this in the next 2 weeks.

Notes *

Save

Submit

Cancel

Navigation

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



Search Supervisor Log

- 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:

▼ Search Supervisor Log

Supervisor * **A** Worker **B** Referral/Case ID * **C**

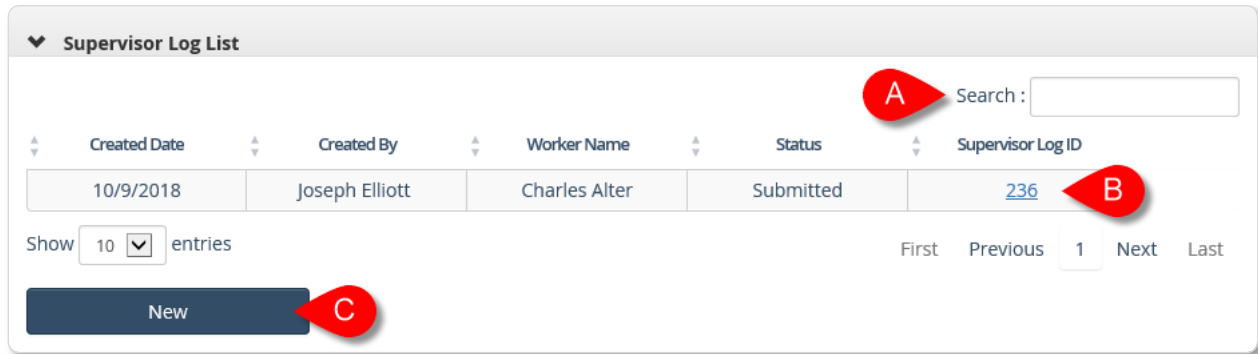
-Select- ▼ -Select- ▼ -Select- ▼

Search Supervisor Log

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



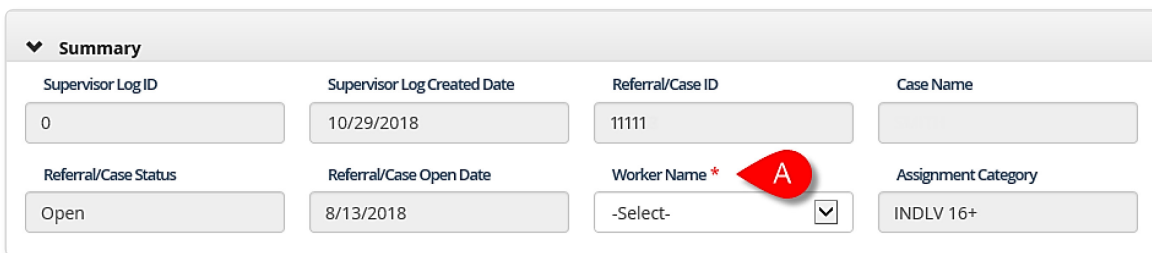
The screenshot shows the 'Supervisor Log List' pane. It features a search bar at the top right (callout A). Below it is a table with columns: Created Date, Created By, Worker Name, Status, and Supervisor Log ID. The first row shows '10/9/2018', 'Joseph Elliott', 'Charles Alter', 'Submitted', and '236' (callout B). Below the table is a 'Show 10 entries' dropdown and pagination links: 'First', 'Previous', '1', 'Next', 'Last'. At the bottom left is a 'New' button (callout C).

- Search:** This field allows the user to filter the grid down to specific log(s).
- Supervisor Log ID:** Click on the ID to navigate directly to that specific Supervisor Log.
- 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.



The screenshot shows the 'Summary' pane with the following fields:

Supervisor Log ID 0	Supervisor Log Created Date 10/29/2018	Referral/Case ID 11111	Case Name
Referral/Case Status Open	Referral/Case Open Date 8/13/2018	Worker Name * -Select- (callout A)	Assignment Category INDLV 16+

- 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	Male	02/10/1981		No	1111111111	
Show 10 entries		First	Previous	1	Next	Last
Address Phone Gender and Sexuality						
Address Type	Address Summary			Primary Address	Validated?	
Business	1234 Main St Pittsburgh, PA			No	Yes	
Show 10 entries		First	Previous	1	Next	Last

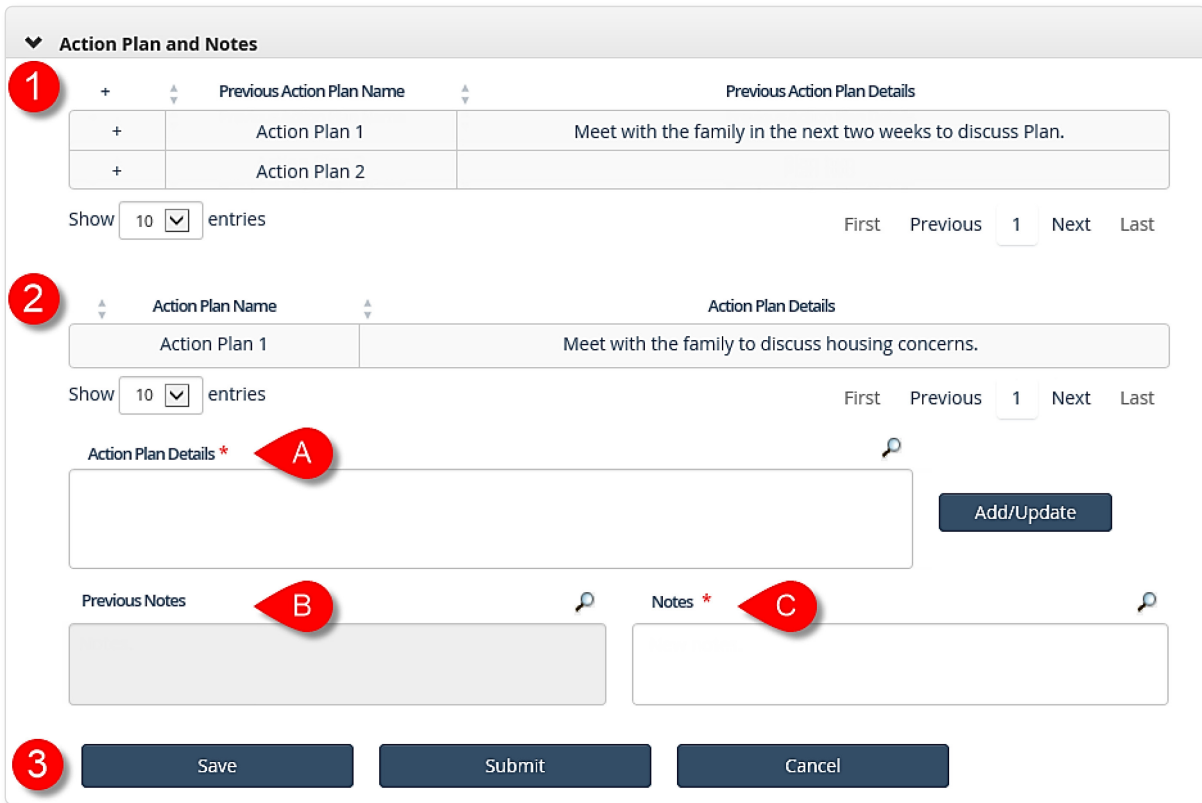
- a. To view a specific Household Member's information, click on that individual in the *Household Member* grid.
- b. The **Address** tab is displayed first by default. To view the *Phone* or *Gender and Sexuality* information for the selected individual, click on the **Phone** or **Gender & Sexuality** 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 *Document 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	

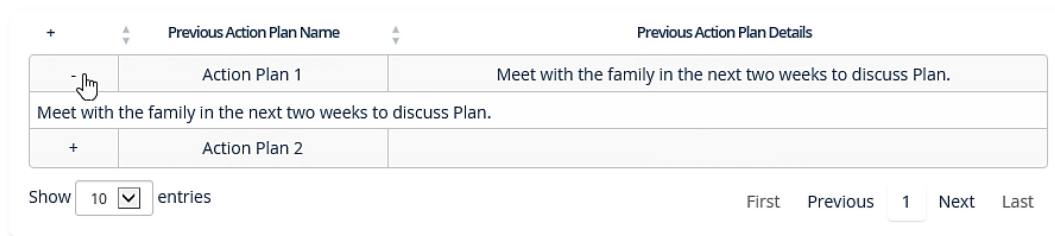
Completing the Action Plan and Notes Pane

▼ 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.



The screenshot shows the 'Action Plan and Notes' pane. It contains a table for 'Previous Action Plans' with columns for 'Previous Action Plan Name' and 'Previous Action Plan Details'. Below this is a section for 'Action Plan Details' with a text area and an 'Add/Update' button. At the bottom are sections for 'Previous Notes' and 'Notes', each with a text area. At the very bottom are 'Save', 'Submit', and 'Cancel' buttons. Red callouts are placed as follows: 1 points to the 'Previous Action Plans' table; 2 points to the 'Action Plan Details' section; 3 points to the 'Save', 'Submit', and 'Cancel' buttons. Lettered callouts are placed as follows: A points to the 'Action Plan Details' text area; B points to the 'Previous Notes' text area; C points to the 'Notes' text area.

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.



This close-up screenshot shows the 'Previous Action Plans' table. It has two columns: 'Previous Action Plan Name' and 'Previous Action Plan Details'. The first row shows 'Action Plan 1' with the detail 'Meet with the family in the next two weeks to discuss Plan.' A '+' icon is to the left of the first row, and a '-' icon is to the left of the second row. The second row shows 'Action Plan 2' with the detail 'Meet with the family in the next two weeks to discuss Plan.' Below the table is a 'Show' dropdown set to '10' and 'entries', and pagination links for 'First', 'Previous', '1', 'Next', and 'Last'.

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:

- 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.
 - To edit an existing entry, click on the desired entry in the *Action Plan* grid, update the *Action Plan Details* and click **Add/Update**.
- Previous Notes:** The notes from the last submitted Action Plan will appear here and will be read-only.
- 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.

- Save**, **Submit**, and **Cancel**:
 - To save the current entries in Draft form, click **Save**. Action Plans in Draft status can be edited.
 - To finalize the Action Plan, click **Submit**. Action Plans are not editable after they have been submitted.
 - 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>