




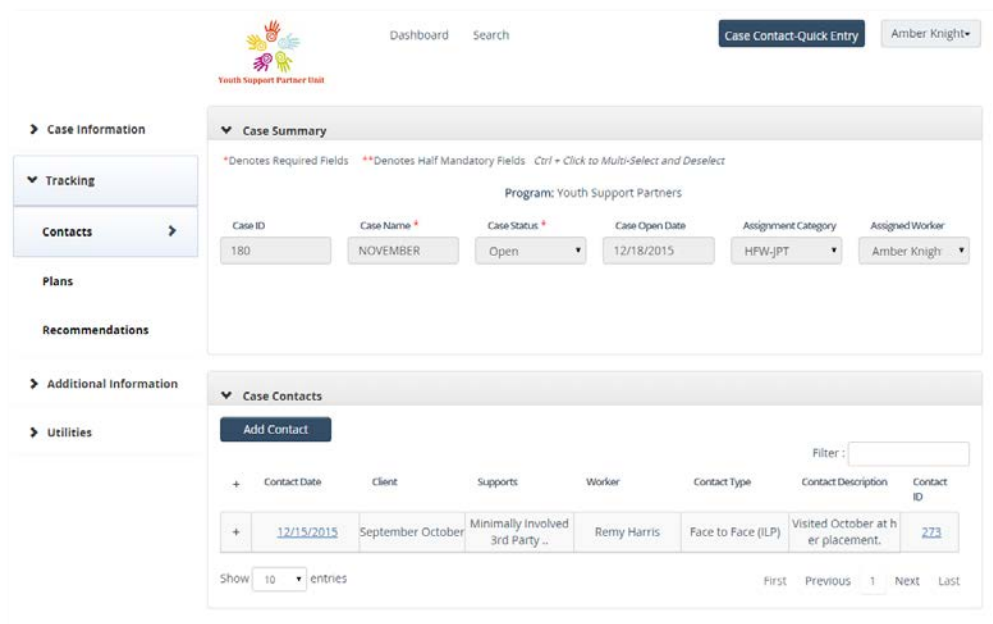


Tracking – Contacts – YSP Job Aid



The Contacts screen is used to document when there is any type of communication pertaining to a Case and its member. If the Youth is JPT (Joint Planning Team) active the JPT details screen will be available to complete in the Contact. If the Youth is IL (Independent Living) eligible, the IL details screen will be available in the Contact to allow YSP staff to document IL Service Logs for that Contact. Contacts entered via *Case Contact-Quick Entry* will also appear in the Contacts grid.

If there is an active YSP referral from the KIDS system information will be transmitted back into the KIDS system upon approval of the Contact. The  next to a field indicates that this field transmits back to KIDS. Every field in the *Contact Activity* pane transmits back into KIDS as a Contact Summary. Every field on the *IL Details* pane both transmits back into KIDS as an IL Service Log. Clicking on the  - Integrated with  link in the top-right of the pane will display a pop-up with details of the data connection.

Case Contacts Screen



Accessing the Contacts Screen

1. **Contacts** can be found under **Tracking** and can be accessed several ways:
 - a. From the **Dashboard**: Open the **Active Cases** pane and click on the  (Contacts icon) which appears to the right of each case in the grid.
 - b. Navigating from within the case:
 - i. **Tracking** → **Contacts**
 - ii. **Case Information** → **Summary** → **Next Steps** →  **Add Contact**



Case Contacts Pane

▼ Case Contacts

Add Contact

Filter :

+	Contact Date	Client	Supports	Worker	Contact Type	Contact Description	Contact ID
-	12/15/2015	October November		Amber Knight	Outgoing Phone	Completed a phone call	238
Contact Notes : Spoke with Ms. November about the housing options available to her. She provided me with more information about her needs.							
+	12/15/2015		Barbara Britt..	Marieke Johnson	Outgoing Email/Text	Email to Shelter Staff and Advocate	239

Show entries

First Previous Next Last

1. To start documenting a new Contact click

Add Contact

.
2. To view or update an existing Contact click on the *Contact Date* or *Contact ID* of the desired Contact in the

Case Contacts

 grid.
3. To view the *Contact Notes* from the grid without opening the Contact click on the [+] to the left of the Contact in the grid. To close the *Contact Notes* view click on the [-] that now appears to the left of that Contact in the grid.
4. To view the *Contact Notes* for all of the Contacts in the current page of the grid click on the [+] above the grid. To collapse all of the Contact Notes click on the [-] that now appears above the grid.

+	Contact Date	Client	Supports
+	12/15/2015	October November	

5. If a Contact includes multiple Clients or Supports that column in the grid will have an ellipsis [...] after the first Client or Support name listed:

Client	Supports
October November	
	Barbara Britt..



Completing the Contact

Dashboard Search Case Contact-Quick Entry Amber Knight

Case Information Tracking Contacts Plans Recommendations Additional Information Utilities

Contact Activity Additional Details JPT Details IL Details

Case Summary

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

Case ID: 84 Name: November Status: Open Open Date: 11/23/2015 Assignment Category: HFW-JPT

Staff Name: Amber Knight Role: Caseworker Phone#: Contact Created Date:

Contact Activity

Integrated with kids

Contact Date * 12/18/2015 Contact Status * -Select- Clients ** September October (2/3/19) OCTOBER NOVEMBER (Yout) Supports ** Minimally Involved 3rd Part

Type/Location * -Select-

Primary Purpose of contact * -Select- Emergency Contact

Notification * -Select- Contact By Youth Support Partners

Contact Description *

Contact Notes *

New Support Change Log Next

Use the **Back** and **Next** buttons to navigate between the Contact screens.

Contact Progress Bar

Contact Activity

Additional Details

JPT Details

IL Details

The Contact Progress Bar will show the worker which sections have been completed in the Contact. The Contact sections will change based on JPT involvement and IL eligibility. The *JPT Details* section will only appear if the Youth is involved with JPT (The *Case Assignment Category* must have "HFW-JPT" selected). The *IL Details* section will only appear if the Youth is IL eligible.



Contacts Case Summary Pane

Case Summary

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

Case ID: 84	Name: November	Status: Open	Open Date: 11/23/2015	Assignment Category: HFW-JPT
Staff Name: Amber Knight	Role: Caseworker	Phone#:	Contact Created Date:	

The **Case Summary** pane is non-editable and displays information about the Case and the Contact being viewed/edited. This information includes the *Case ID*, *Case Name*, *Case Status*, *Case Open Date*, *Assignment Category*, the *Staff Name*, *Role*, *Phone#*, and the *Contact Created Date*.

Contact Activity Pane

Contact Activity

Contact Date * **A**

Type/Location * **C**

Primary Purpose of contact * **D**

Notification * **F**

Contact Description * **G**

Contact Notes * **H**

Contact Status * **B**

☐ Emergency Contact **E**

Contact By
Youth Support Partners

Clients ** **I**

Supports **

New Support

October November (Youth) (5)

Minimally Involved 3rd Party

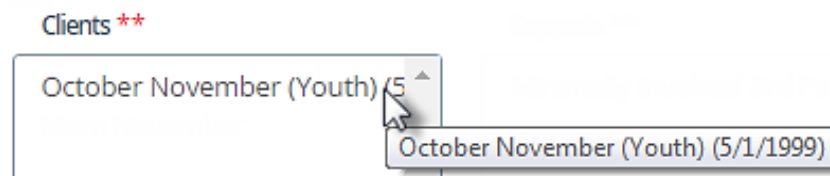
Change Log

Next



1. The **Contact Activity** pane is where the primary details of the Contact are documented. The *Date*, *Worker*, *Contact Type*, and *Contact Description* will pull into the **Case Contacts** pane's list of Contacts along with the *Clients* and *Supports* who participated in the Contact.
 - a. *Contact Date*: Enter the date that the Contact occurred.
 - b. *Contact Status*: Select the status of the Contact.
 - c. *Contact Type/Location*: Select the method of Contact from this drop-down.
 - d. *Primary Purpose of Contact*: Select the Contact purpose from this drop-down.
 - e. *Emergency Contact*: Check this box if this should be flagged as an Emergency Contact when the Contact is transmitted back into KIDS. Checking this checkbox does not replace the need to Contact the OCYF caseworker directly regarding safety concerns.
 - f. *Notification*: Select whether or not the Contact was announced or unannounced
 - Contact By*: This is a non-editable field and will always display "Youth Support Partners".
 - g. *Contact Description*: Enter a brief description of the Contact.
 - h. *Contact Notes*: Enter the narrative of the Contact here.
 - i. *Clients and Supports*: Click to select the Clients and Supports who participated in the Contact from these two multi-select boxes. Only active Clients and Supports will be available as options.

- i. To select more than one person in the Client or Support boxes hold down the **Ctrl** key on the keyboard while clicking on each Client or Support who participated in the Contact. Selected individuals be highlighted in blue or grey after their names have been clicked. To de-select a Client or Support hold down the **Ctrl** key and click on the individual again. The de-selected individual will then no longer be highlighted.
 - ii. Clients will display with their name and date of birth. The Youth will have "(Youth)" next to their name. To view the full name and date of birth hover the cursor over the client's name.



- iii. The option of "Minimally Involved 3rd party" will always be available in the *Supports* box. This option can be selected when the person participating in the Contact does not meet the criteria to be included in the list of Supports on the case.
 - iv. If a participating Support person is not listed in the Supports box they can be added using the **New Support** button. Remember that this list only includes active Supports. Only add a new Support if the person has not previously been documented as a Support on this case. An end-dated Support can be made active again in **Case Information** → **Supports**.



- v. If a participating Client is not listed in the *Clients* box they can be added in Case Information → Household. Only add a new Client if the person has not previously been documented as a Client on this case.

1. An end-dated Client can be made active again under

Case Information → Involvement.

Don't forget to click Save in the Contact Activity pane before navigating to another screen or the information entered will be lost!

Making a Support active again? Go to:
Case – Supports – YSP Job Aid

Adding a Client? Go to:
Case – Household – YSP Job Aid

Making a Client active again? Go to:
Case – Involvements – YSP Job Aid

2. Adding a new Support from within the Contact Activity pane:

- a. Click the New Support button.
b. The *Search Supports* pop-up will appear:

Search Supports

First Name * Last Name * Gender * Birth Date Search Location

Barbara Brit Female -Select-

Search

Search Result

Select	MCIID	Collateral Id	First Name	Last Name	Gender	Support Type	Contact #
<input type="radio"/>		66	Barbara	Britt	Female	Advocate	
<input type="radio"/>		27	Barbara	Britt	Female		

Show 10 entries First Previous 1 Next Last

Create Support Close

- i. Enter the *First Name*, *Last Name*, *Gender*, and *Birth Date* (if known).
ii. Select the *Search Location*. Supports can be searched for in all of Synergy (Enterprise) or only in a specific program such as YSP or HCM.




- iii. Click the **Search** button to locate possible matches in the system. A list of possible matches will display in the *Search Result* grid.
- iv. Review the results. If none of the results match the person being added, click **Create Support** without selecting anyone from the *Search Result* grid.
- v. If there is a match in the *Search Result* grid click the *Select* radio button next to the desired person and then click **Create Support**.
- vi. To close the *Search Support* pop-up without adding a support click **Close**.

c. When **Create Support** is clicked the *Supports* pop-up will appear.

The screenshot shows a 'Supports' pop-up form. It has a header 'Supports' and a light gray background. The form is divided into several sections. The top section contains 'Support Category' (dropdown), 'Support Type *' (dropdown), 'Business Name' (text), and 'Prefix' (text). Below this is a row with 'First Name *' (text), 'Middle Name' (text), 'Last Name' (text), and 'Birth Date' (text). The next row has 'Gender *' (dropdown), 'SSN' (text), and 'Notes' (text area). Below that are 'Primary Phone#' (text) and 'Secondary Phone#' (text). The next row has 'Email' (text) and 'Active *' (dropdown). Below this is an 'Address Details' section with a table. The table has columns 'Address Type', 'Address 1', 'Address 2', and 'City'. Below the table are 'State' (dropdown), 'Zip Code *' (text), and 'Extension' (text). At the bottom are buttons: 'Save Support', 'Cancel', 'New', and 'Save Address'.

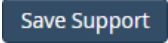
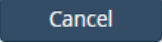
- i. Enter all of the relevant information for this Support in the *Supports* pop-up.
- ii. Multiple addresses can be entered for the Support. The Support can also be saved without entering an address.
 1. To add a new address click **New**.
 2. When the address is completed click **Save Address** to add this address to the *Address Details* grid.



3. If an address has been added in error click the delete icon [] to the right of the address in the *Address Details* grid to delete it.


Address Details	
Address Type	Address Summary
Business	123 Main St Pittsburgh, PA, 15215







- iii. To save the Support click .
- iv. To close the pop-up without saving the Support click .


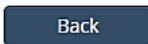
3. To move on to  click .


Additional Details

 **Additional Details**

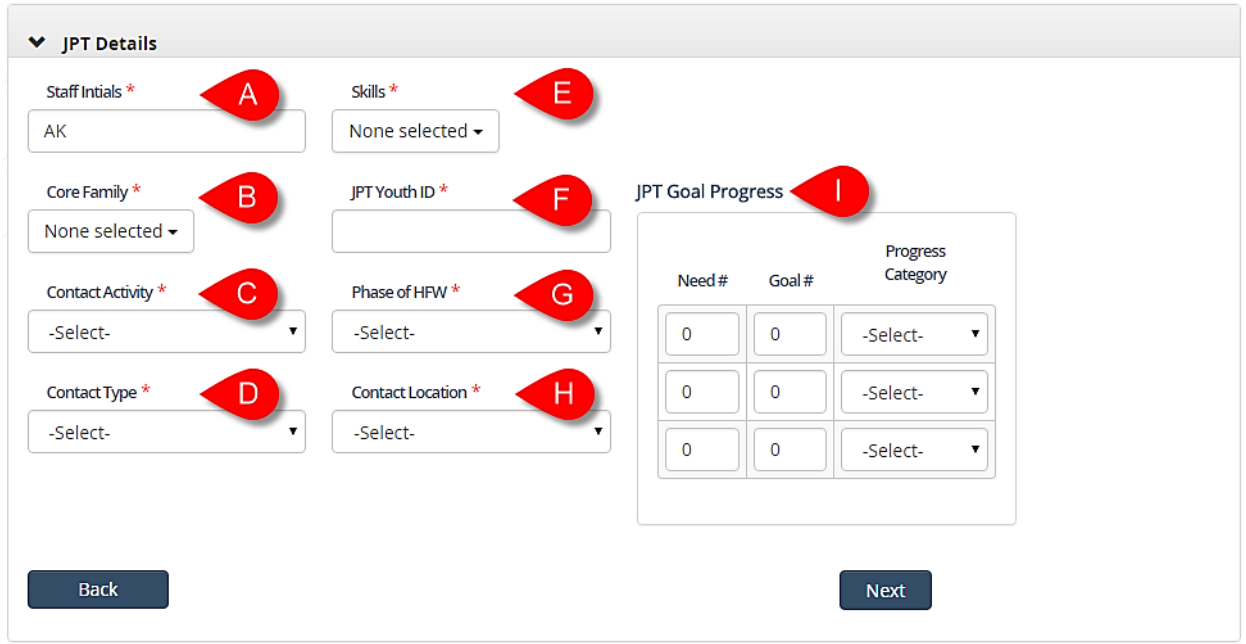
 - Integrated with

YSP Phase	YSP has primarily been	YSP Unit Status	
<div>-Select-</div>	<div>-Select-</div>	<div>-Select-</div>	
Start Time *	End Time *	Travel Time *	
<div></div>	<div></div>	<div></div>	
Total Contact Duration	Total Duration		
Is this child removed from the home?	Date of last home removal	Contact Details	
<div>No</div>	<div></div>	<div>Provider casework</div>	
Provider Agency :			
Address :			



1. The  pane contains YSP specific questions, time and travel information, and placement information (from the KIDS System).
- Complete the YSP drop-downs that are relevant to this Contact.
 - Enter the *Start Time*, *End Time*, and *Travel Time* (if there is no travel involved enter "00:00"). The *Total Contact Duration* will automatically be calculated based on the Start and End Times entered. *Total Duration* will automatically add together the *Total Contact Duration* and *Travel Time*.
 - Is this child removed from the home?*, *Date of last home removal* (if the Youth is currently removed from their home), *Contact Details*, and *Provider Agency / Address* (if the Youth is in placement) will pull in from the KIDS system. These are non-editable fields.

JPT Details



JPT Details

Staff Initials * **A**
AK

Skills * **E**
None selected

Core Family * **B**
None selected

JPT Youth ID * **F**

Contact Activity * **C**
-Select-

Phase of HFW * **G**
-Select-

Contact Type * **D**
-Select-

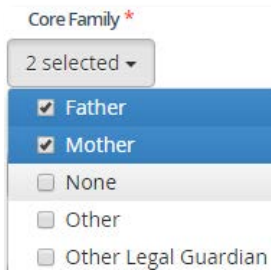
Contact Location * **H**
-Select-

JPT Goal Progress **I**

Need #	Goal #	Progress Category
0	0	-Select-
0	0	-Select-
0	0	-Select-

Back Next

1. **JPT Details** captures the questions and information needed for Joint Planning Team cases. This screen will only be available in the Contact if the case assignment is "HFW-JPT".
 - a. *Staff Initials* automatically populates with the initials of the user who is logged in and completing the Contact.
 - b. *Core Family* is a multi-select drop down menu. Choose the applicable core family members. The selected core family members can be viewed by hovering over the drop-down.



Core Family *

2 selected

- ☒ Father
- ☒ Mother
- ☐ None
- ☐ Other
- ☐ Other Legal Guardian



Core Family *

2 selected

Father, Mother

- c. Select the *Contact Activity*.
- d. Select the *Contact Type*.
- e. *Skills* is a multi-select drop down menu. Choose the Skills that were addressed in this Contact.
- f. Enter the *JPT Youth ID*.
- g. Select the applicable *Phase of HFW*.
- h. Select the *Contact Location*.
- i. Enter the applicable *Need* and *Goal* numbers and their *Progress Categories*.



IL Details

IL Details

Domain *

Unit Type *

Units *

Activity *

Client *

Services *

Comments

Save

Domain	Client	Unit Type	Units	Activity	Services
Case Planning	OCTOBER NOVEMBER	Minutes	30	Visited Youth at placement	Transition/IL plan meeting/ include attendees and ...
Employment	OCTOBER NOVEMBER	Minutes	30	Practiced interviewing	Job preparedness and job etiquette discussion, Pra...

Show 10 entries

First Previous 1 Next Last

Back

☐ Send for Supervisor Approval

Submit

- IL Details** captures all of the IL Service Logs associated with this Contact. This screen will only be available in the Contact if the Youth is IL eligible. Multiple IL Service Logs can be documented for one Contact as long as the combined total time of the IL Service Logs does not go over the *Total Contact Duration*.

In the above example the YSP worker visited the Youth in placement and spent 30 minutes of the visit in an IL Plan meeting and 30 minutes doing a Practice Job Interview with the Youth. The whole Contact lasted 60 minutes. The YSP worker documented 2 IL Service Logs on the **IL Details** pane as part of their overall Contact documentation.

1/5/2016

TRACKING — CONTACTS — YSP JOB AID

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At the end of this section is a labelled diagram of where fields A through F will feed into KIDS.

- Select an IL *Domain*. The list of possible services associated with the selected Domain will display in the *Services* multi-select box (D).
- Choose the *Unit Type* and enter the number of minutes/hours for the IL Service Log in the *Units*. Every IL Service Log entered for this Contact will start out defaulted to a *Unit Type* of "Minutes" and will automatically enter the *Total Contact Duration* from the **Additional Details** pane. For example, an hour long Contact will have the *Unit Type* and *Units* default to "Minutes" and "60" as a way to remind the user of the *Total Contact Duration* without having to leave this page.

Don't forget to change the Units for each IL Service Log to the actual amount of time spent on that specific Service Log.

- Type in the *Activity* title for this IL Service Log.
- Select all of the *Services* that apply in the multi-select box

Remember to hold down the **Ctrl** key on the keyboard while clicking to select or de-select *Services*.

- Enter the *Comments* for the IL Service Log and click **Save** to add the IL Service Log to the grid.
- All of the Saved IL Service Logs for this Contact will display in the IL Service Log grid at the bottom of the pane.
- To delete an IL Service Log from the grid, click the delete icon [] to the right of the IL Service Log line in the grid.

The KIDS IL Service Log screen:

The screenshot shows the KIDS IL Service Log screen. It is divided into two main sections: 'Service Summary' and 'Service Detail'.

Service Summary: A table with columns: Date, Domain, Unit Type, Units, Last Updated By, and Last Updated Date. It contains two rows of data. A red box labeled 'F' highlights the 'Domain', 'Unit Type', and 'Units' columns.

Service Detail: A form with various input fields. Red labels A through F point to specific fields:

- A:** Points to the 'Domain' dropdown menu.
- B:** Points to the 'Unit Type' dropdown menu.
- C:** Points to the 'Units' text input field.
- D:** Points to the 'Service(s)' multi-select box.
- E:** Points to the 'Comments' text area.
- F:** Points to the 'Units' text input field in the 'Service Summary' table.



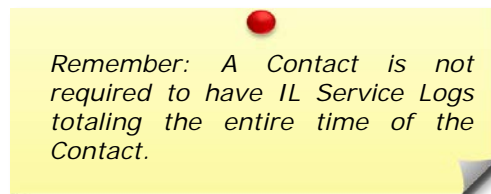
2. When **Save** is clicked the user may receive an informational pop-up.
- a. If all of the IL Service Logs entered do not add up to the *Total Contact Duration* this pop-up will appear:

Confirm IL Log

You have not documented the entire contact.
Do you wish to Submit?

Yes **No**

This pop-up is letting the user know that they have not documented IL Service Logs covering the entire length of the Contact based on the amount of time calculated in the *Total Contact Duration*.




- b. If the total units of all of the IL Service Logs entered go over the *Total Contact Duration* this pop-up will appear:

Confirm IL Log

You have documented more time than the length of your contact. Do you wish to Submit?

Yes **No**

This pop-up is letting the user know that they have documented IL Service Logs in excess of the entire length of the Contact based on the amount of time calculated in the *Total Contact Duration*.

- c. To save this IL Service Log to the grid click **Yes**. If **No** is clicked the IL Service Log will not be saved to the grid and the user will have to click the **Save** button again.
- d. To edit any of the IL Service Logs click on the desired IL Service Log in the grid and that IL Service Log's details will appear above the grid where they can be edited and saved again.
- e. Remember, to delete an IL Service Log from the grid, click the delete icon [] to the right of the IL Service Log line in the grid.



Approval and Submission to KIDS

1. When the Contact is completed the Contact Progress Bar will be completely green and have a check mark beside each page title.

✓ Contact Activity ✓ Additional Details ✓ JPT Details ✓ IL Details

- a. To send the Contact for approval check the *Send for Supervisor Approval* checkbox at the bottom of the last screen and click **Submit**.
- b. The Contact will be sent to the **Dashboard** of the worker's direct Supervisor.
- c. From their **Dashboard** the Supervisor can review the Contact under **Unapproved Case Contacts** and either approve or reject the Contact. If the Contact is approved it will be transmitted to the KIDS system (if applicable).
- d. If the Contact is rejected the Contact will be sent back to the worker's **Dashboard** under **Rejected Case Contacts**.
- e. The worker can click on the *Contact ID* in the **Rejected Case Contacts** grid to view the *Manager Feedback* for the Contact. This feedback is located at the bottom of the last screen of the Contact.

The screenshot shows a 'Manager Feedback' box with the text: 'The JPT Case number is incorrect. Please fix this and re-submit the Contact.' Below the feedback box is a checkbox labeled 'Send for Supervisor Approval' and a 'Submit' button.

- f. Once the necessary corrections have been made the worker can send the Contact for approval again.

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>