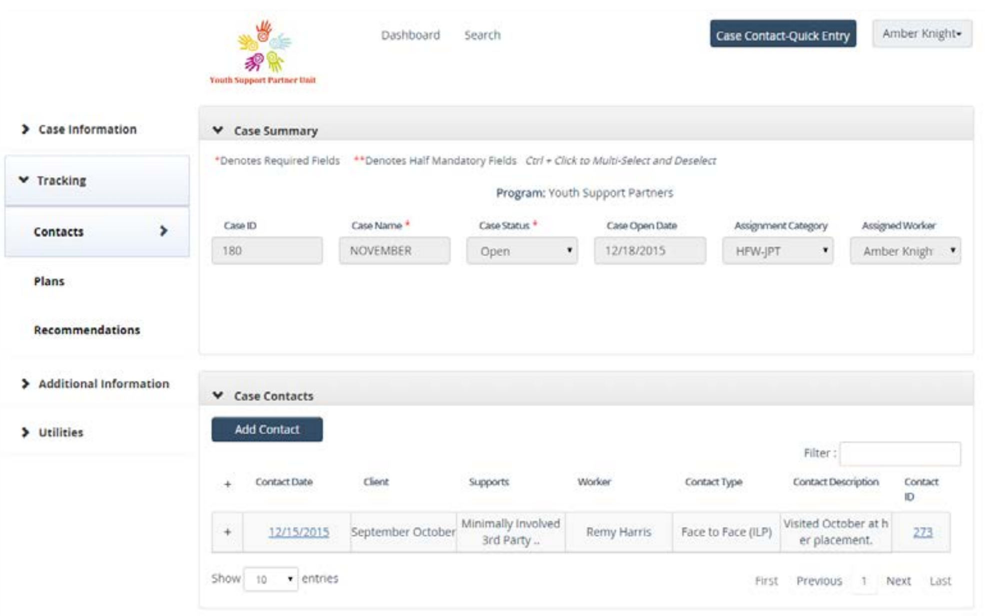
Tracking – Contacts – YSP Job Aid

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 kids link in the top-right of the pane will display a pop-up with details of the data connection.

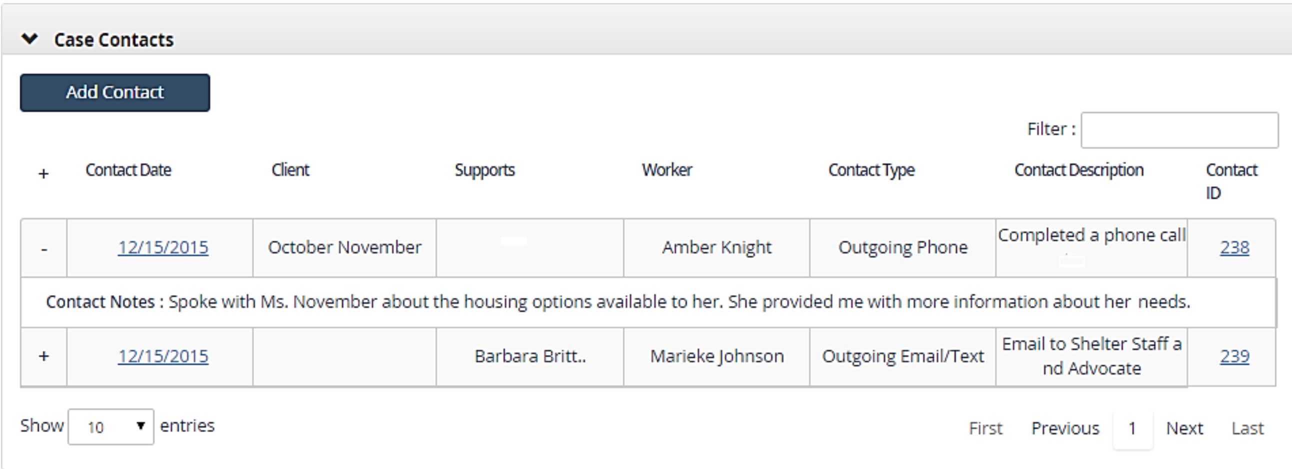
Case Contacts Screen



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

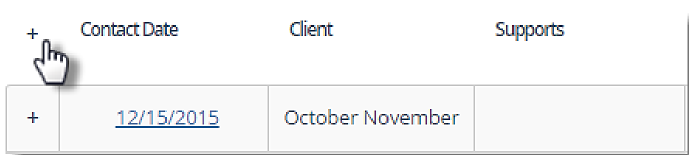


1. To start documenting a new Contact click Add Contact.

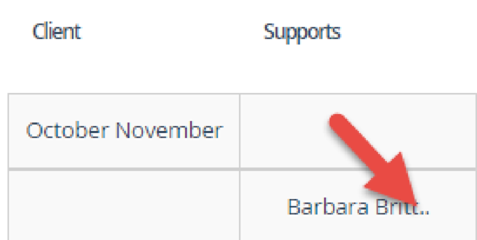
2. To view or update an existing Contact click on the *Contact Date* or *Contact ID* of the desired Contact in the Case Contacts grid.

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.

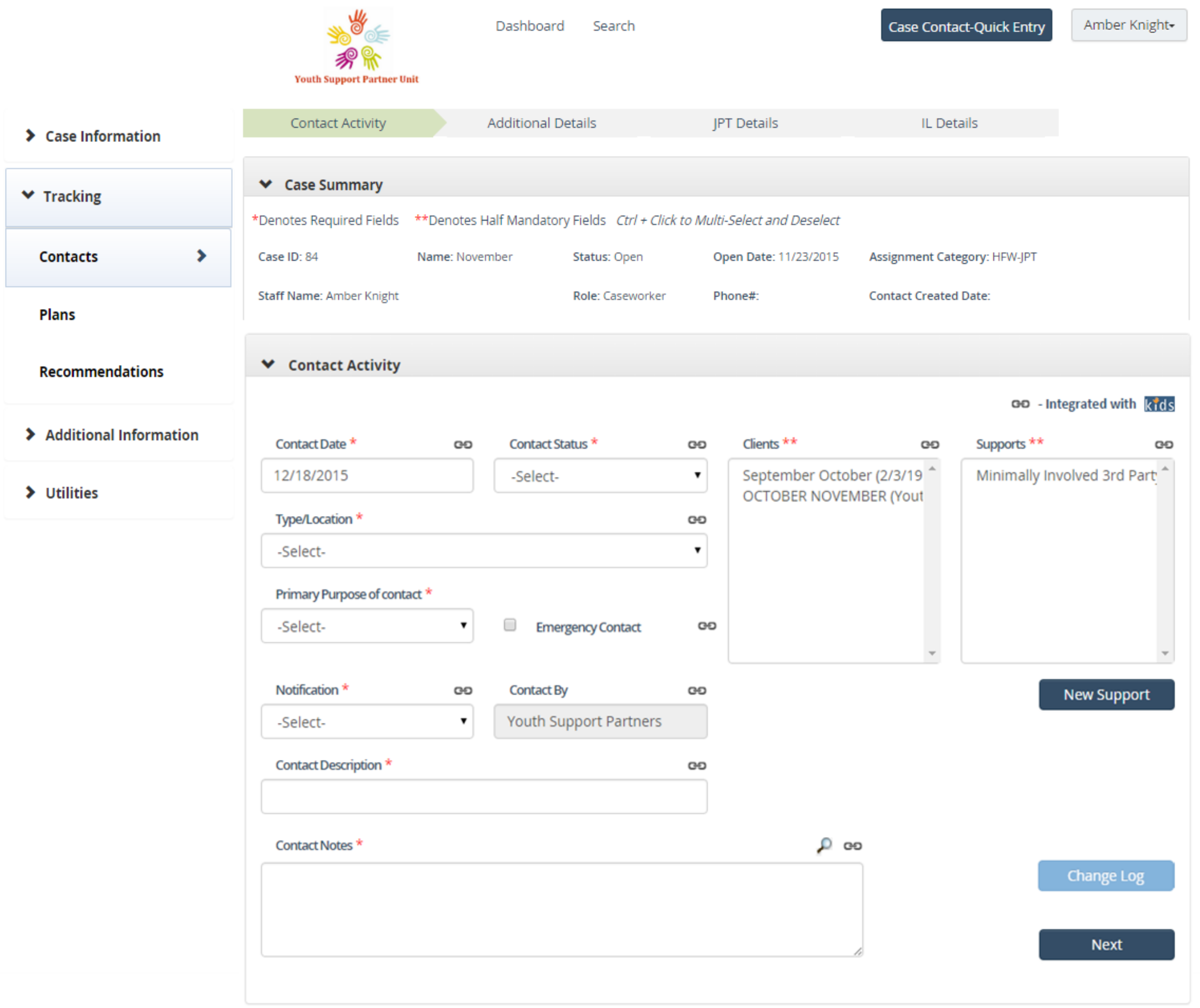
4. To view the *Contact Notes* for all of the Contacts in the current page of the grid click on the [**+**] above the grid. To collapse all of the Contact Notes click on the [**-**] that now appears above the grid.



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:

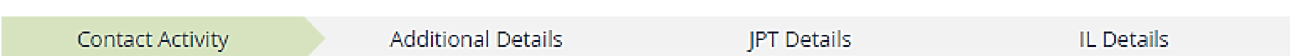


Completing the Contact



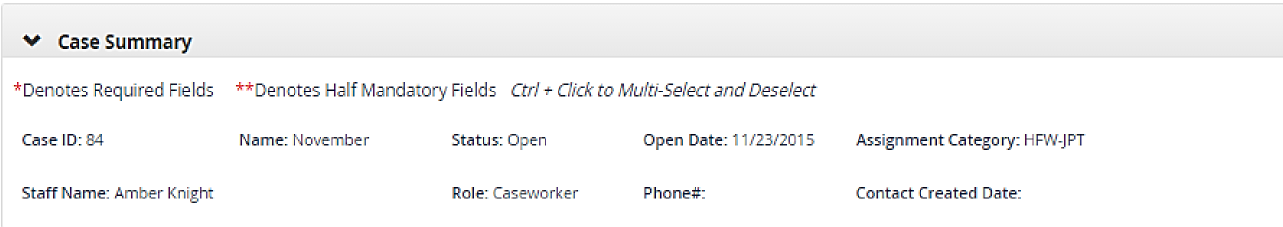
Use the **Back** and **Next** buttons to navigate between the Contact screens.

Contact Progress Bar



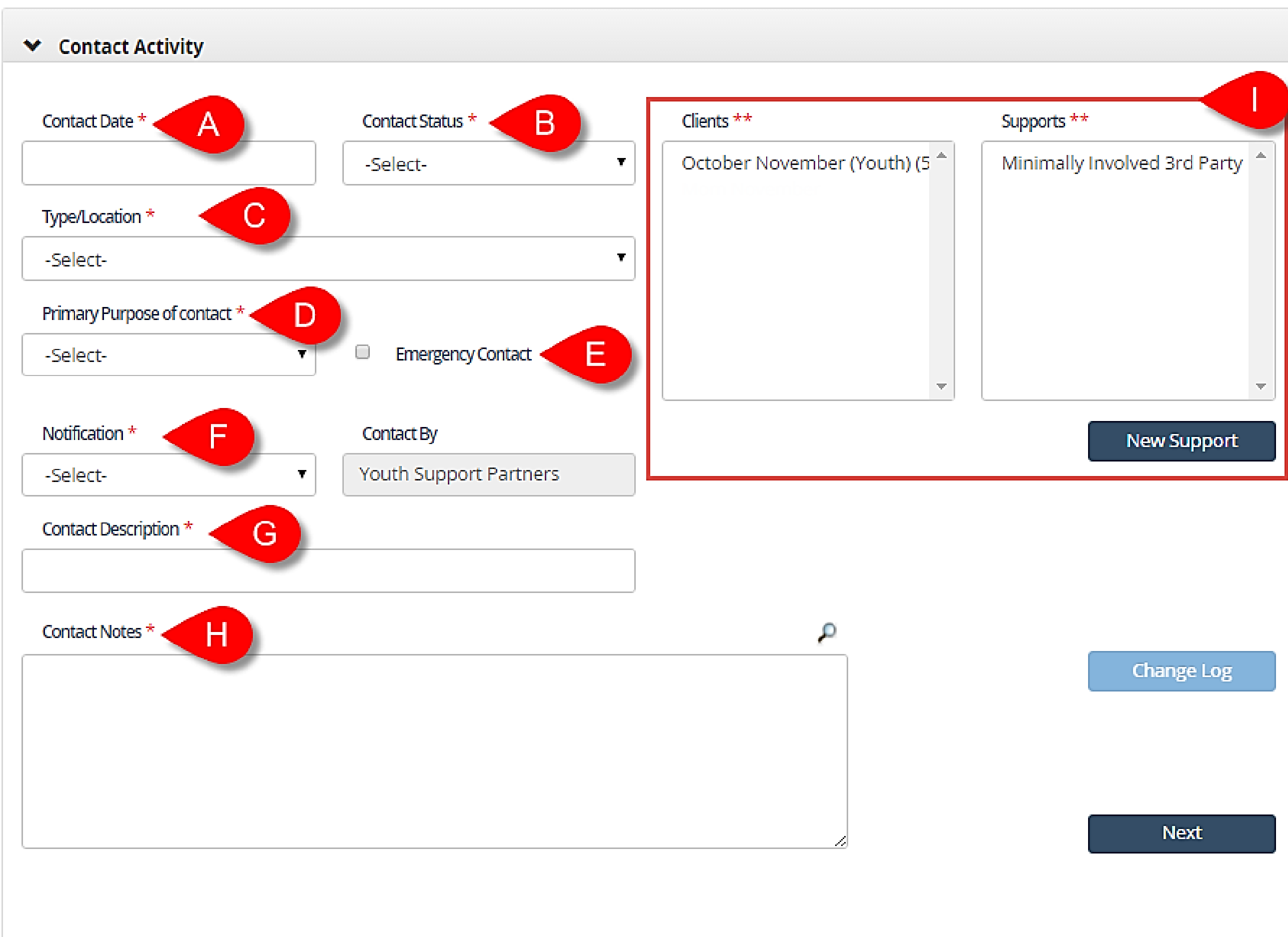
The Contact Progress Bar will show the worker which sections have been completed in the Contact. The Contact sections will change based on JPT involvement and IL eligibility. The *JPT Details* section will only appear if the Youth is involved with JPT (The *Case Assignment Category* must have "HFW-JPT"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

Contacts Case Summary Pane



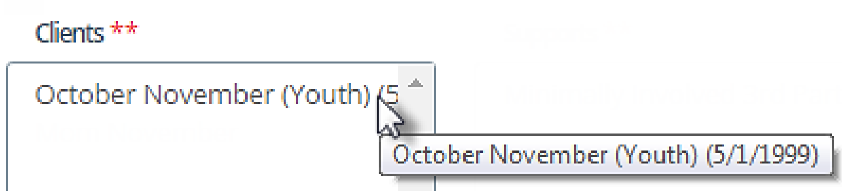
The Case Summary pane is non-editable and displays information about the Case and the Contact being viewed/edited. This information includes the *Case ID*, Case *Name*, Case *Status*, Case *Open Date*, *Assignment Category* the *Staff Name*, *Role*, *Phone#*, and the *Contact Created Date*.

Contact Activity Pane



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

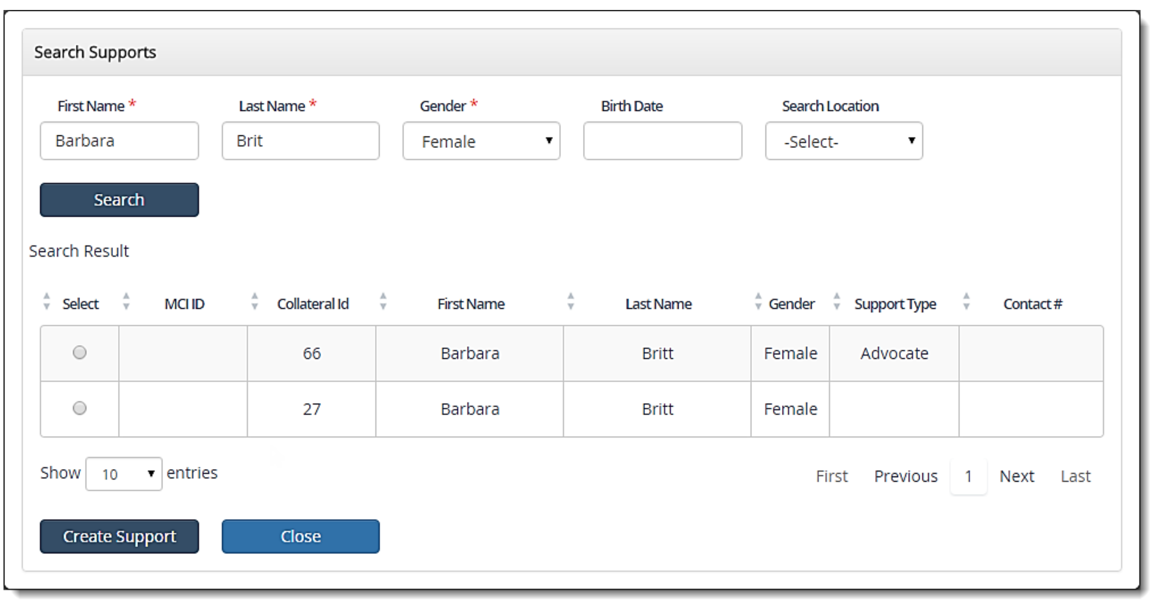
Adding a Client? Go to:
Case – Household – YSP Job Aid

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:



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.

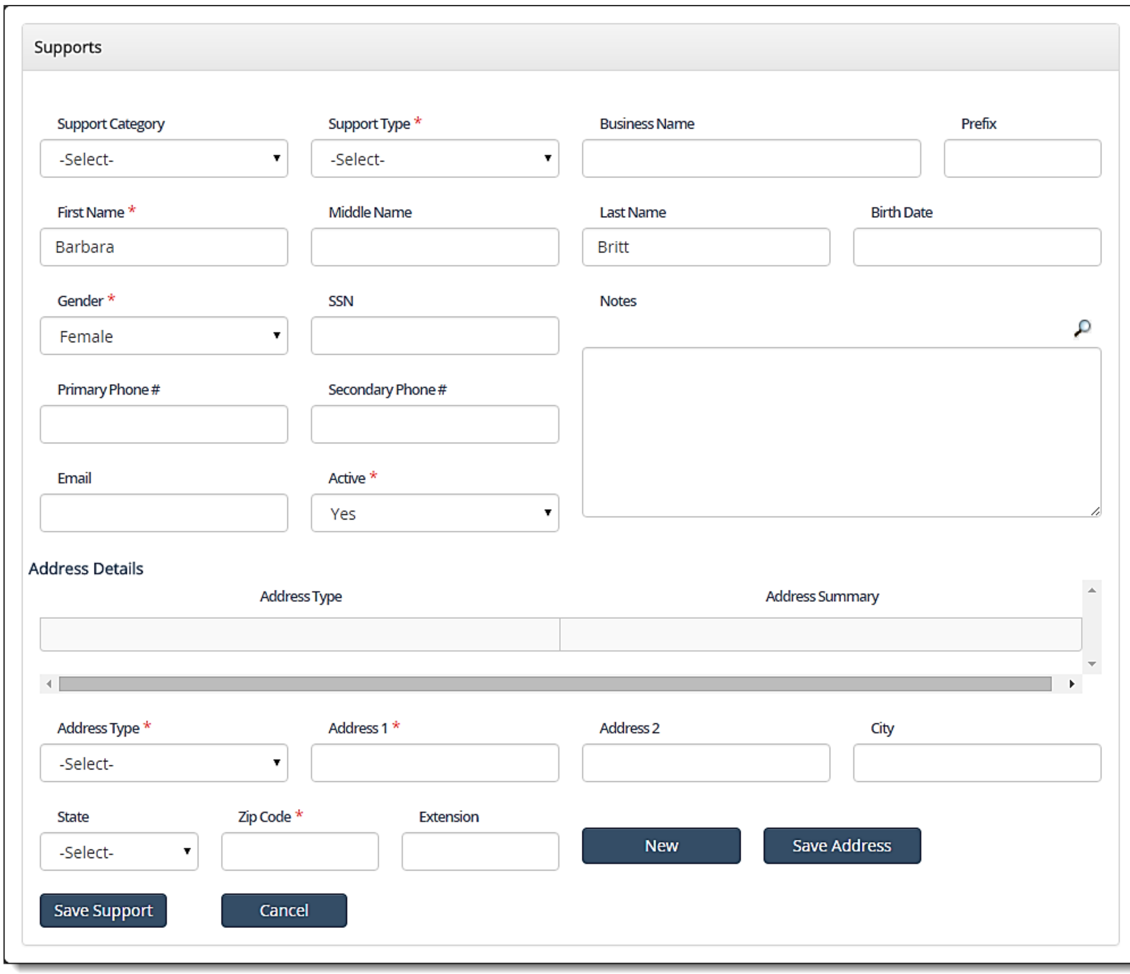
iii. Click the Search button to locate possible matches in the system. A list of possible matches will display in the *Search Result* grid.

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.

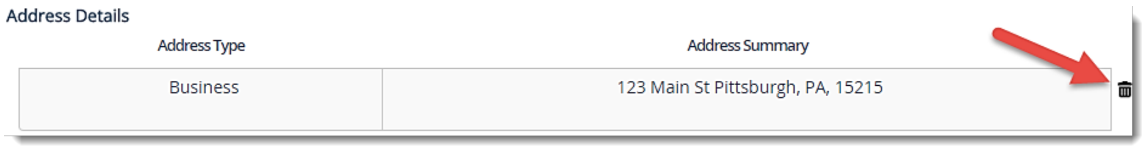


i. Enter all of the relevant information for this Support in the *Supports* pop-up.

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.

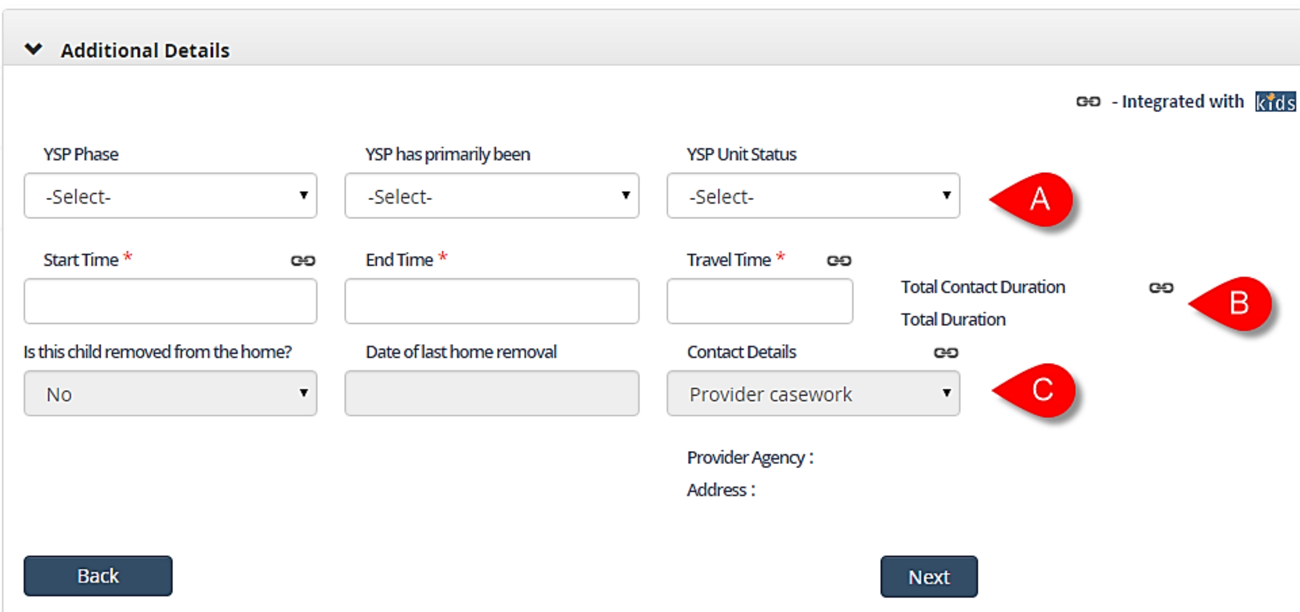


iii. To save the Support click **Save Support**.

iv. To close the pop-up without saving the Support click **Cancel**.

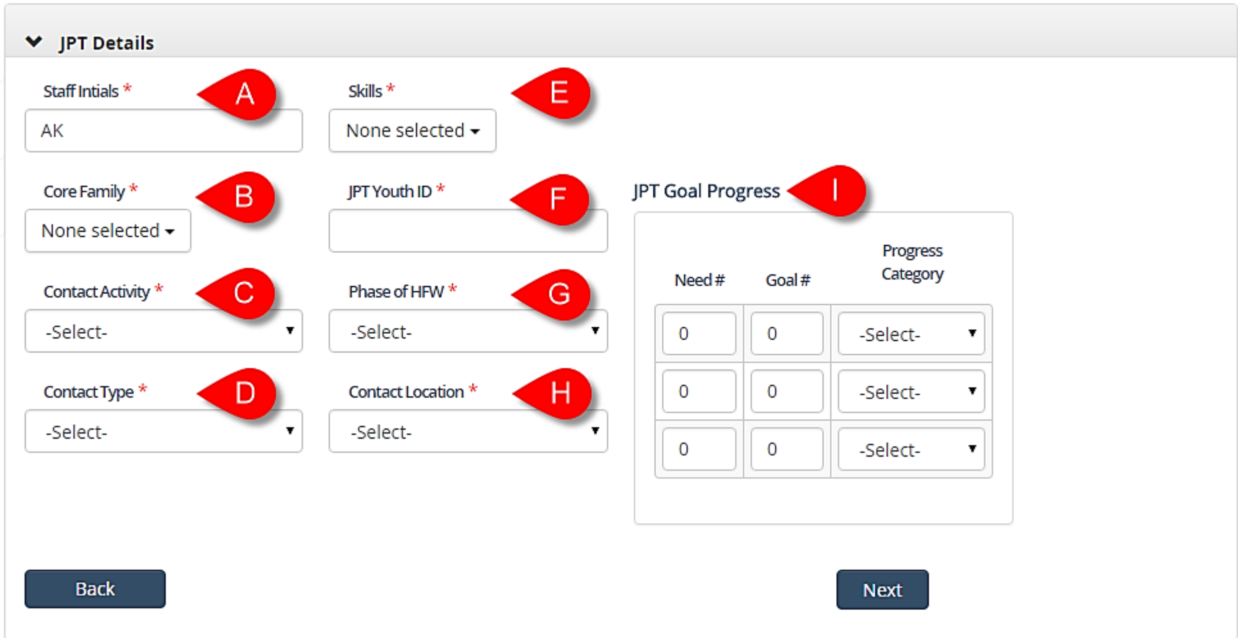
3. To move on to **Additional Details** click **Next**.

Additional Details

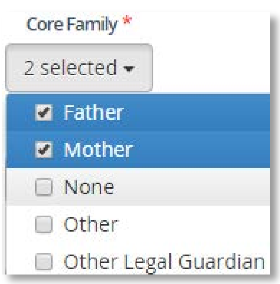


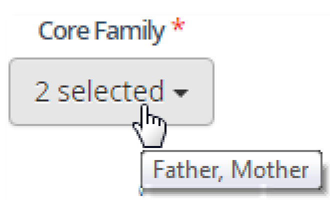
1. The **Additional Details** pane contains YSP specific questions, time and travel information, and placement information (from the KIDS System).
   a. Complete the YSP drop-downs that are relevant to this Contact.
   b. Enter the *Start Time*, *End Time*, and *Travel Time* (if there is no travel involved 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*.
   c. *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



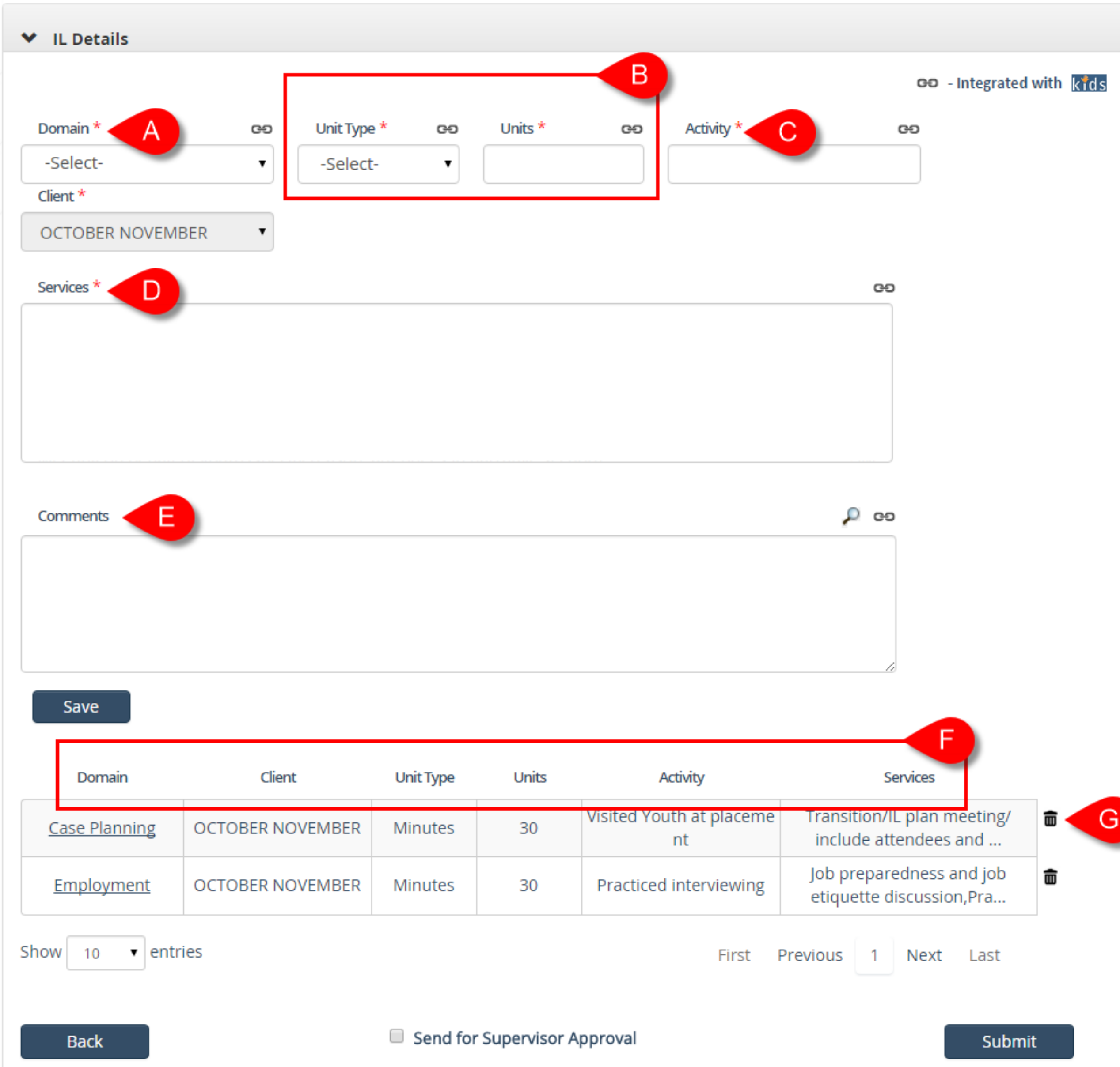
1. JPT Details captures the questions and information needed for Joint Planning Team cases. This screen will only be available in the Contact if the case assignment is "HFW-JPT".
   a. *Staff Initials* automatically populates with the initials of the user who is logged in and completing the Contact.
   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.





   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



1. 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.

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

a. Select an IL *Domain*. The list of possible services associated with the selected Domain will display in the *Services* multi-select box (D).

b. 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.*

c. Type in the *Activity* title for this IL Service Log.

d. Select all of the *Services* that apply in the multi-select box

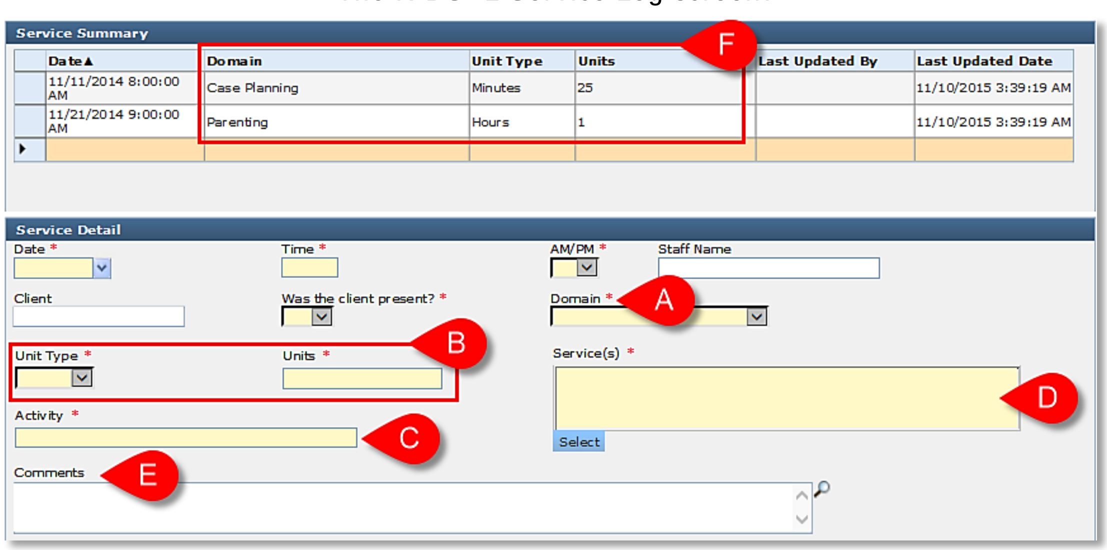
Remember to hold down the [Ctrl] key on the keyboard while clicking to select or de-select *Services*.

e. Enter the *Comments* for the IL Service Log and click [Save] to add the IL Service Log to the grid.

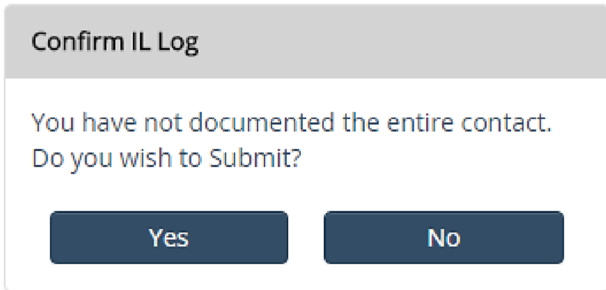
f. All of the Saved IL Service Logs for this Contact will display in the IL Service Log grid at the bottom of the pane.

g. 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:



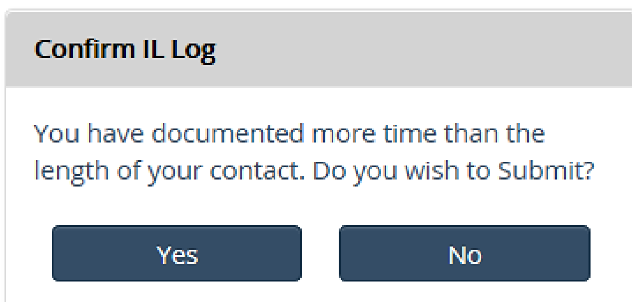
2. When Save is clicked the user may receive an informational pop-up.
   a. If all of the IL Service Logs entered do not add up to the *Total Contact Duration* this pop-up will appear:



   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*.

   > *Remember: A Contact is not required to have IL Service Logs totaling the entire time of the Contact.*

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



   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*.

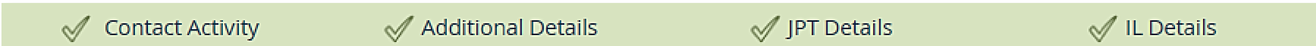
   c. To save this IL Service Log to the grid click Yes. If No is clicked the IL Service Log will not be saved to the grid and the user will have to click the Save button again.

   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.



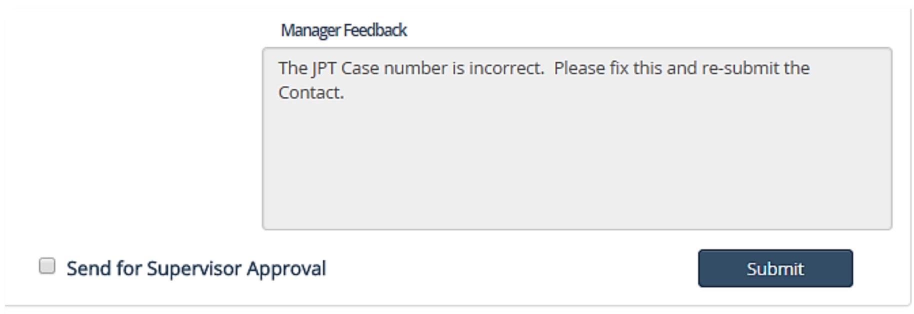
   a. To send the Contact for approval check the *Send for Supervisor Approval* checkbox at the bottom of the last screen and click Submit.

   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.



   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