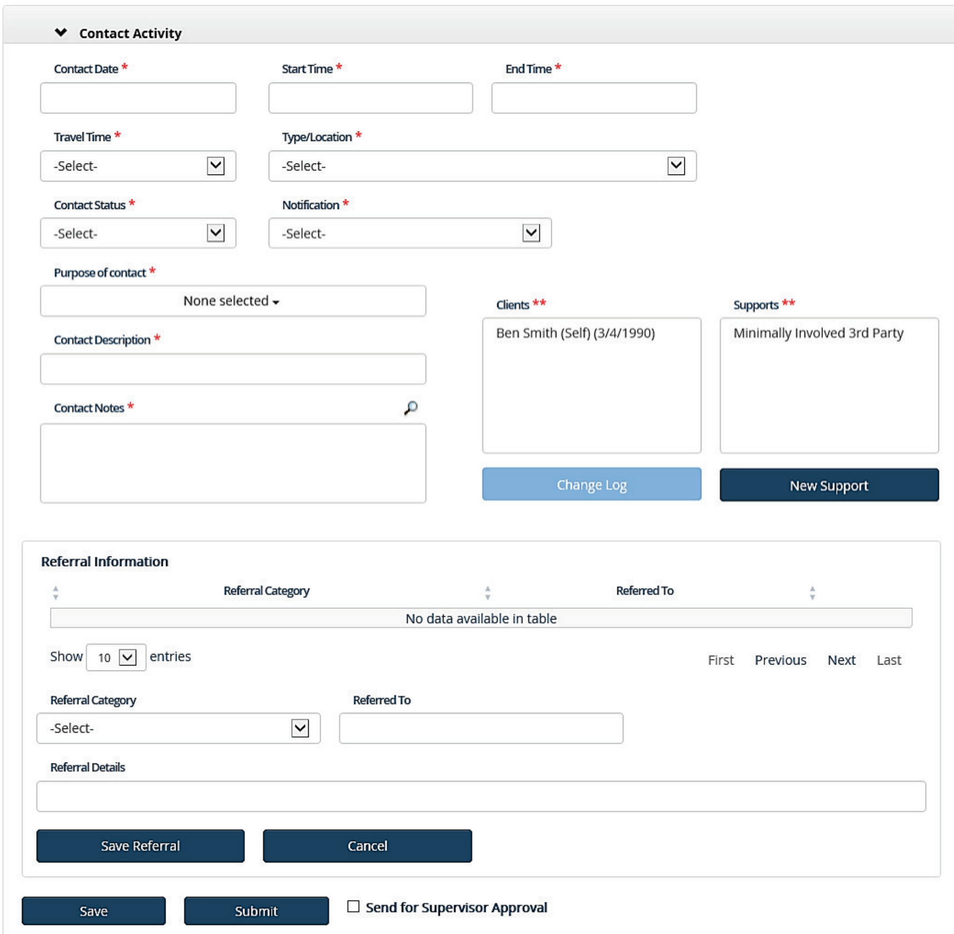
Contacts – FSC Job Aid

The *Case Contacts* screen is used to document when there is any type of communication related to the Case as well as referrals to assistance or services.

Contacts

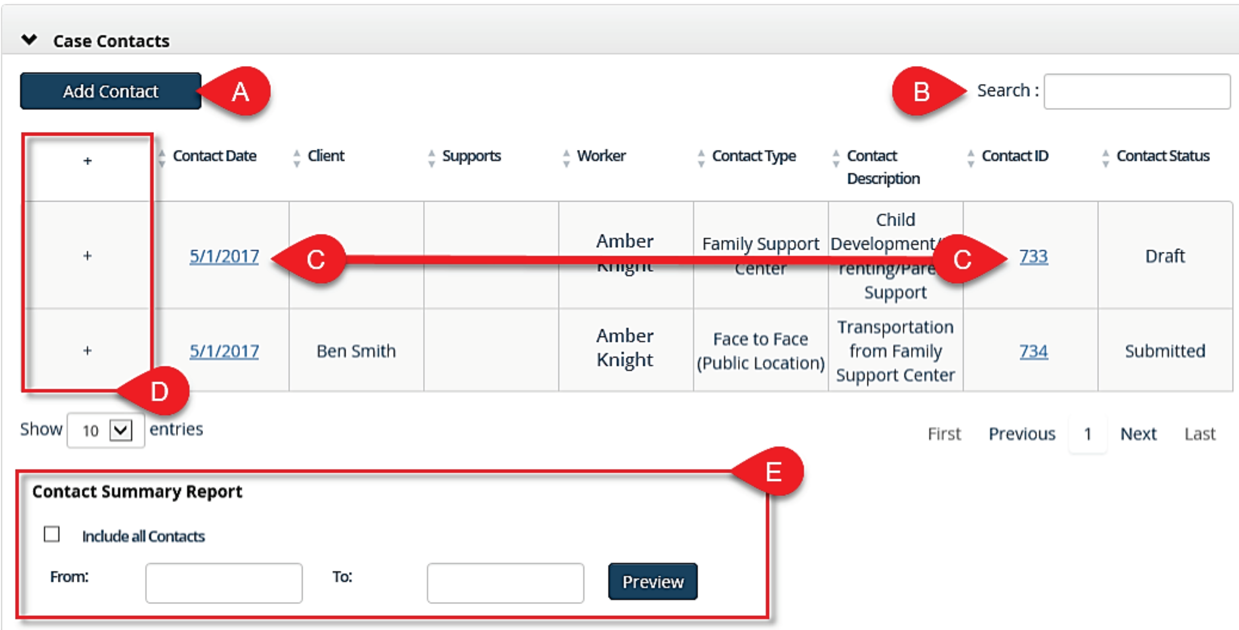


Navigation

1. From the Dashboard:
    a. Locate the desired Case and click on the Case ID to bring the Case into focus. The *Summary* screen will open.
    b. Click on the *Add Contact* Navigation Tile in the Next Steps pane.
2. From within the Case:
    a. Navigate to Tracking → Contacts

Case Contacts and Referral Information Summary

1. Case Contacts :

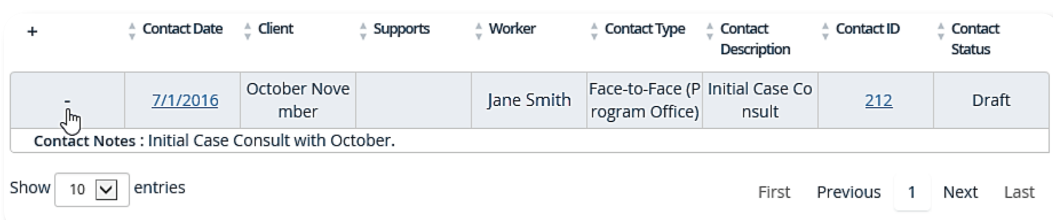


a. To start documenting a new Contact, click **Add Contact** above the *Case Contacts* grid.

b. *Search* allows the user to search with the Case Contacts grid for specific information.

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

d. 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.



i. 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.

e. *Contact Summary Report*: Users can create a printable PDF of the Contact Notes view using this section.

i. To view a specific date range of Contacts:
   1. *From*: Enter a start date for the range.
   2. *To*: Enter an end date for the range.
   3. Click **Preview**.

ii. To view all Contacts:
   1. Check the ☑ *Include all Contacts* checkbox
   2. Click **Preview**.

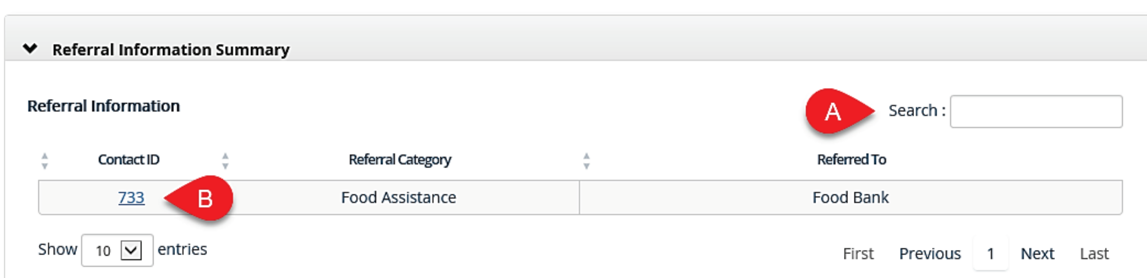
Important Reminder when previewing and printing:

Previews will open in a new window or tab. This window or tab may open in the background and may not be immediately visible. Close all other previews first.

Synergy is **NOT** compatible with Microsoft's Edge browser.

Use either Internet Explorer or Chrome.

2. **Referral Information Summary**: This pane contains a list of all of the referrals documented in all of the Case Contacts.

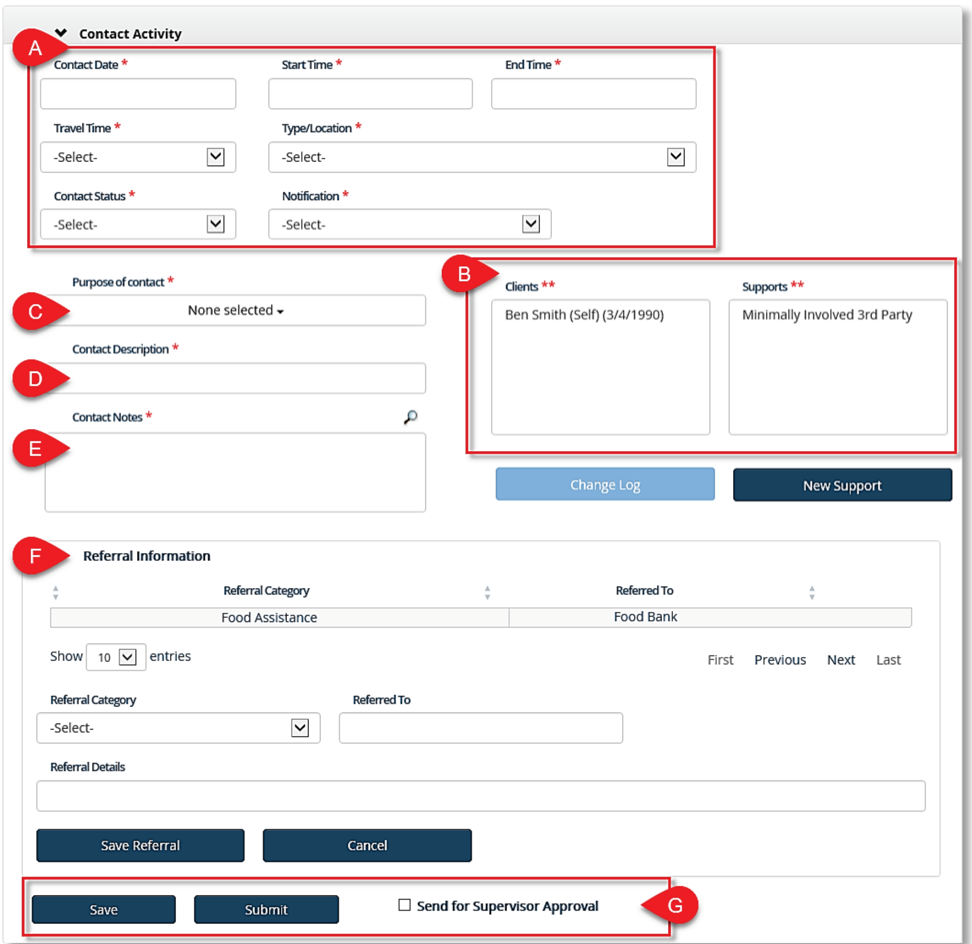


a. *Search* allows the user to search within the *Referral Information Summary* grid for specific referrals.

b. To view the Contact where a specific referral was documented, click on the *Contact ID* of the referral.

Documenting a Contact

1. Contact Activity: Click **Add Contact** to open this pane. This is where the primary details of the Contact are documented. The *Contact Date, Client (Head of Household/Household Members), Supports, Worker,* and *Contact Description* will all pull into the *Case Contacts* grid once the Contact is saved.



a. Contact Information:

i. *Contact Date*: Enter the date that the Contact occurred. This cannot be future dated.

ii. *Start Time*, *End Time*, and *Travel Time*: Enter the time of day that the Contact started and ended. Select the amount of time spent traveling from the *Travel Time* drop-down. If there was no travel, select “Not Applicable”.

iii. *Type/Location*: Select the method of Contact and Location from this drop-down.

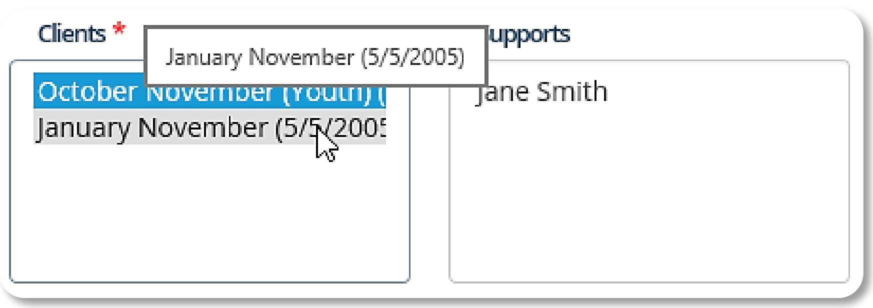
iv. *Contact Status:* Select whether the Contact was attempted or completed.

v. *Notification*: Select whether the Contact was announced or unannounced.

b. *Clients* and *Supports*: Click to select the Clients and/or Supports who participated in the Contact from these half mandatory multi-select boxes.

   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 no longer be highlighted.

   ii. Clients will display with their name and date of birth. To view the full name and date of birth, move the cursor over the client's name.



   iii. If a participating Client/Household Member is not listed in the *Clients* box they can be added or reactivated by going to Case Information → Household. Only add a new Client if the person has not previously been documented as a Client on this Case.

   iv. If a participating Support 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.

Activating or adding a Client/Household Member? Go to:
Household Info – FSC Job Aid

Making a Support active again? Go to:
Supports - FSC Job Aid

Adding a Support from the Contacts screen?
Go to page 10 of this Job Aid.

Remember SAVE before navigating to another screen.

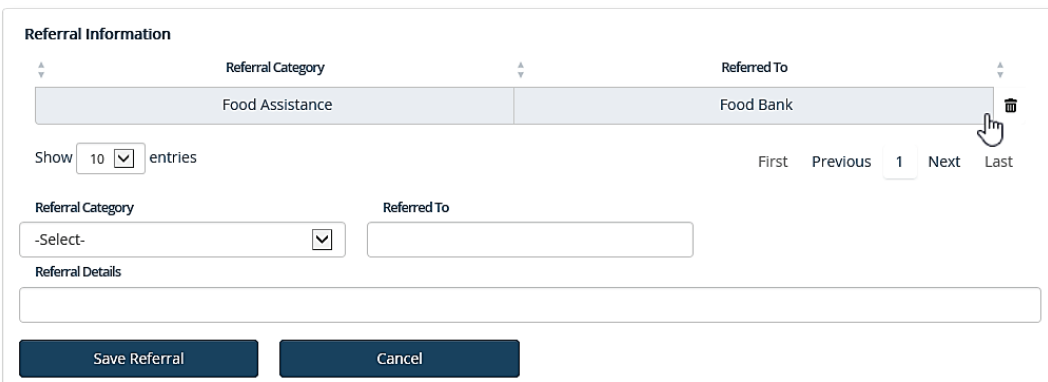
c. *Purpose of Contact*: Select all of the purposes that apply to this contact.

> ***Important Note:*** *Selecting "Approved Home Visiting Model" will allow this contact to be tracked properly for **Home Visiting** reporting purposes.*

d. *Contact Description*: Enter a brief description of the Contact.

e. *Contact Notes*: Enter the narrative of the Contact here.

f. *Referral Information*: If a referral was made as part of this Contact document that information here.



i. *Referral Category*: Select the applicable category from the drop-down.

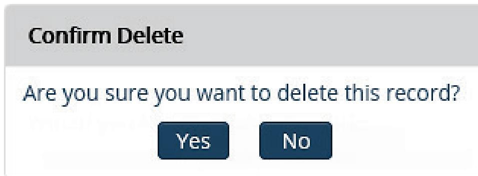
ii. *Referred To*: Enter where the referral was made to.

iii. *Referral Details*: Enter a brief description of the referral that was made.

iv. Click **Save Referral** to add the referral to the *Referral Information* grid. Clicking **Cancel** will clear out the referral information fields without saving the entry.

v. To delete a referral, move the mouse over that referral's line in the grid. Click the Delete Icon [🗑] that appears to the right of the referral in the grid.

1. A *Delete Confirmation* pop-up will appear:



Clicking **Yes** will delete the referral.

Clicking **No** will cancel the action and the referral will not be deleted.

g. Click **Submit** to save the Contact.

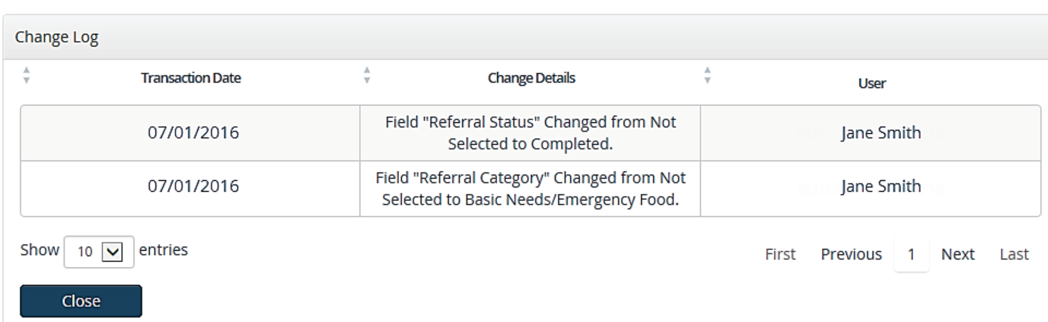
i. If the Contact requires approval, the ☑ *Send for Supervisor Approval* checkbox must be checked before **Submit** can be clicked.

ii. Clicking **Save** will save the information entered in the Contact will navigate back to the *Case Contacts* grid automatically.

iii. Clicking **Cancel** will navigate back to the *Case Contacts* grid. Any unsaved information will be lost.

Change Log (Audit Trail)

1. The **Change Log** button will become dark blue (active) when any changes have been made to the contact after the contact has been saved for the first time. Clicking on the **Change Log** button will open the *Change Log* pop-up. In this pop-up the date of each change (*Transaction Date*), *Change Details*, and *User* who made the change will be listed.



Change Log

Transaction Date	Change Details	User
07/01/2016	Field "Referral Status" Changed from Not Selected to Completed.	Jane Smith
07/01/2016	Field "Referral Category" Changed from Not Selected to Basic Needs/Emergency Food.	Jane Smith

Show 10 entries   First Previous 1 Next Last

Close

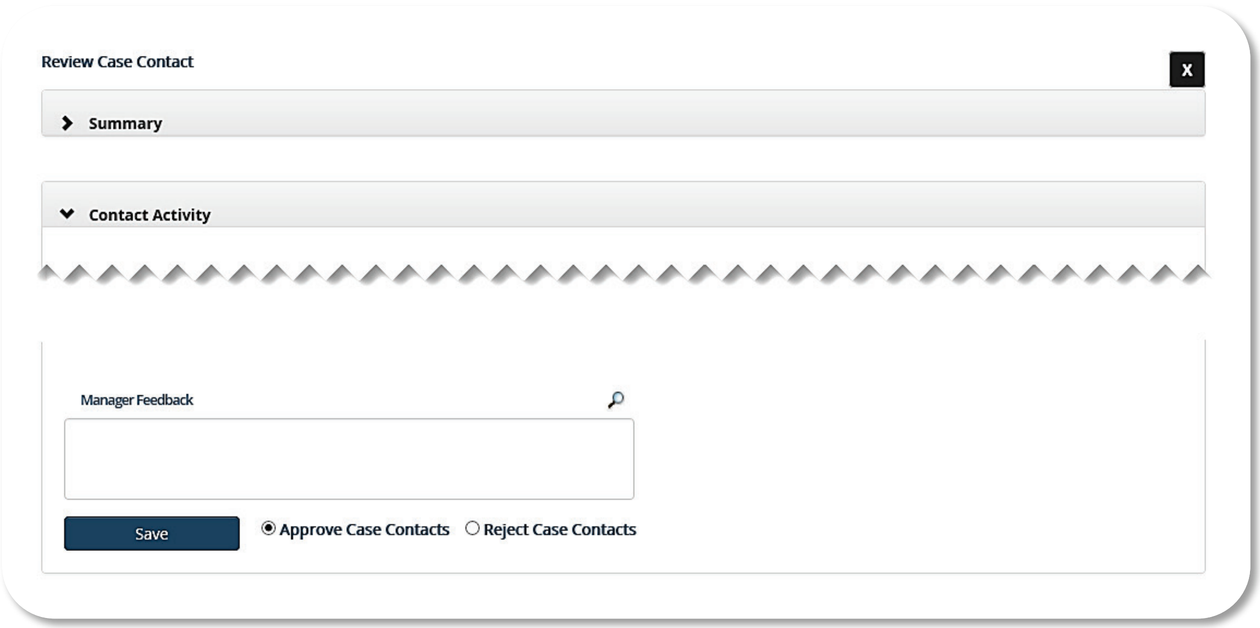
Click **Close** to close the *Change Log* pop-up.

Approvals

1. Requesting Approval: If an approval is required for the user's Case Contacts, the ☐ *Send for Supervisor Approval* checkbox will appear next to the **Submit** button.
    a. Check the ☑ *Send for Supervisor Approval* checkbox and click **Submit** to send the Contact for approval.

    b. The Contact's *Status* in the *Case Contacts* grid will change from "Draft" to "Pending Approval"

2. Approving or Rejecting the Contact: The Contact will appear on the Supervisor or Manager's Dashboard in the **Unapproved Case Contacts** pane. From there the Supervisor/Manager can either approve or reject the Contact by clicking on the *Contact ID*.



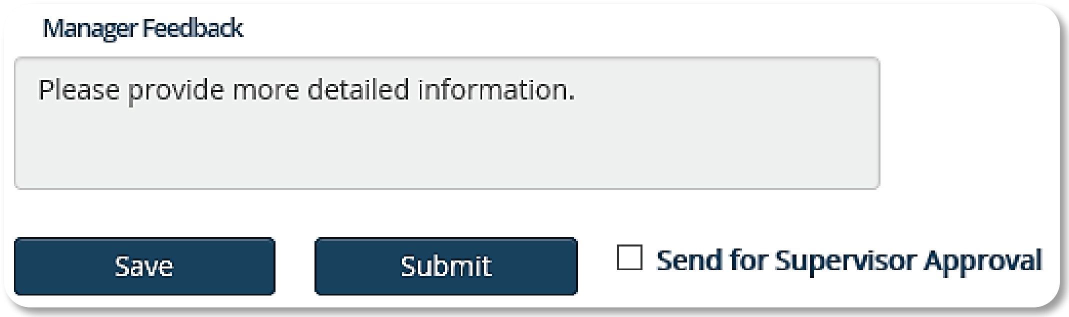
i. The *Review Case Contact* pop-up will open to display all of the Contact details.

ii. Selecting ◉ *Approve Case Contacts* and clicking **Save** will approve the Contact.

iii. Selecting ◉ *Reject Case Contacts*, entering *Manager Feedback* and clicking **Save** will send the Contact back to the submitting staff person.

iv. Clicking the **X** in the top right corner of the pop-up will close the pop-up without saving anything; the Contact will then remain in the **Unapproved Case Contacts** pane until it has been approved or rejected.

3. Rejected Contacts will appear on the Dashboard of the worker who submitted the Contact under **Rejected Case Contacts**. Clicking on the *Contact ID* will navigate directly to the Contact where the *Manager Feedback* will be displayed at the bottom of the screen.



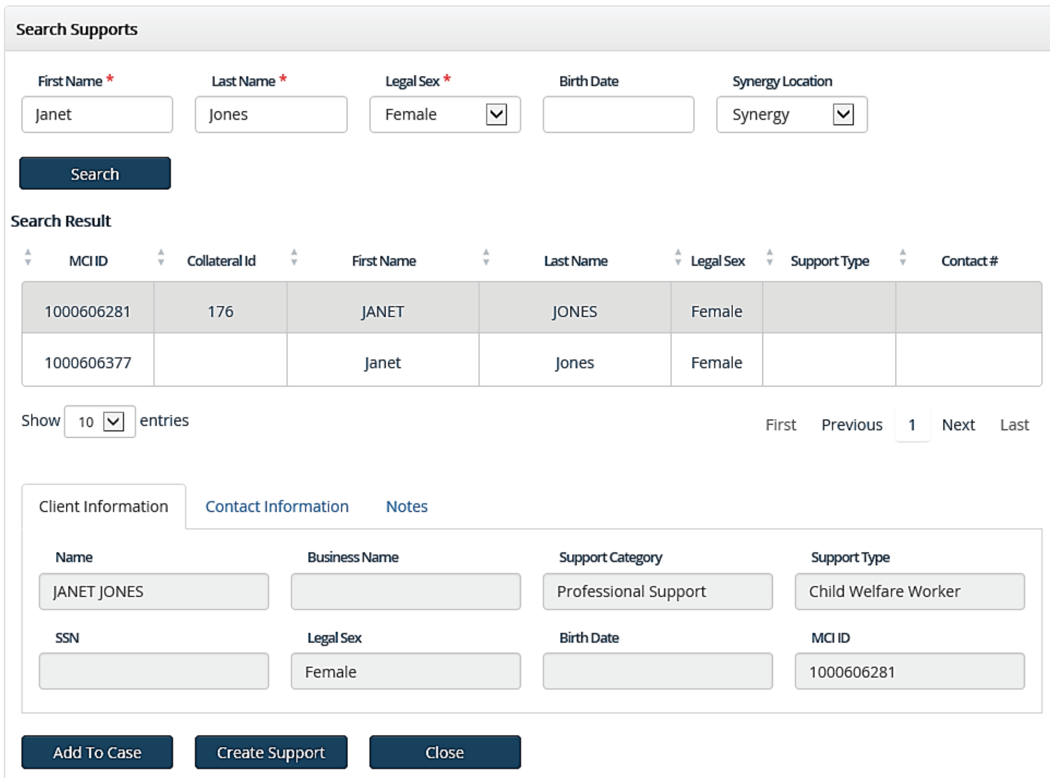
The worker can then update the Contact and resubmit the Contact for approval by checking the ☑ *Send for Supervisor Approval* checkbox and clicking **Submit**.

4. Approved Contacts will have a *Status* of "Submitted" in the *Case Contacts* list. Approved Contacts can be updated and resubmitted at which point their status will return to "Pending Approval" until they are approved again.

Creating a new Support from within the Case Contact

1. Adding a new Support from within the **Contact Activity** pane: Click the **New Support** button.

2. The *Search Supports* pop-up will appear:



a. Enter the *First Name, Last Name, Legal Gender,* and *Birth Date* (if known).

> ***Note:*** *Do not enter birth dates for Professional Supports.*

b. *Synergy Location*: This drop-down defaults to "Synergy". Supports can be searched for in all of Synergy or only in a specific program such as YSP, HCM, or ITM.

c. Click the **Search** button to locate possible matches in the system. A list of possible matches will display in the *Search Result* grid. Click on a line in the grid to view that individual's information.

d. Review the results including the information on the *Client Information, Contact Information,* and *Notes* tabs.

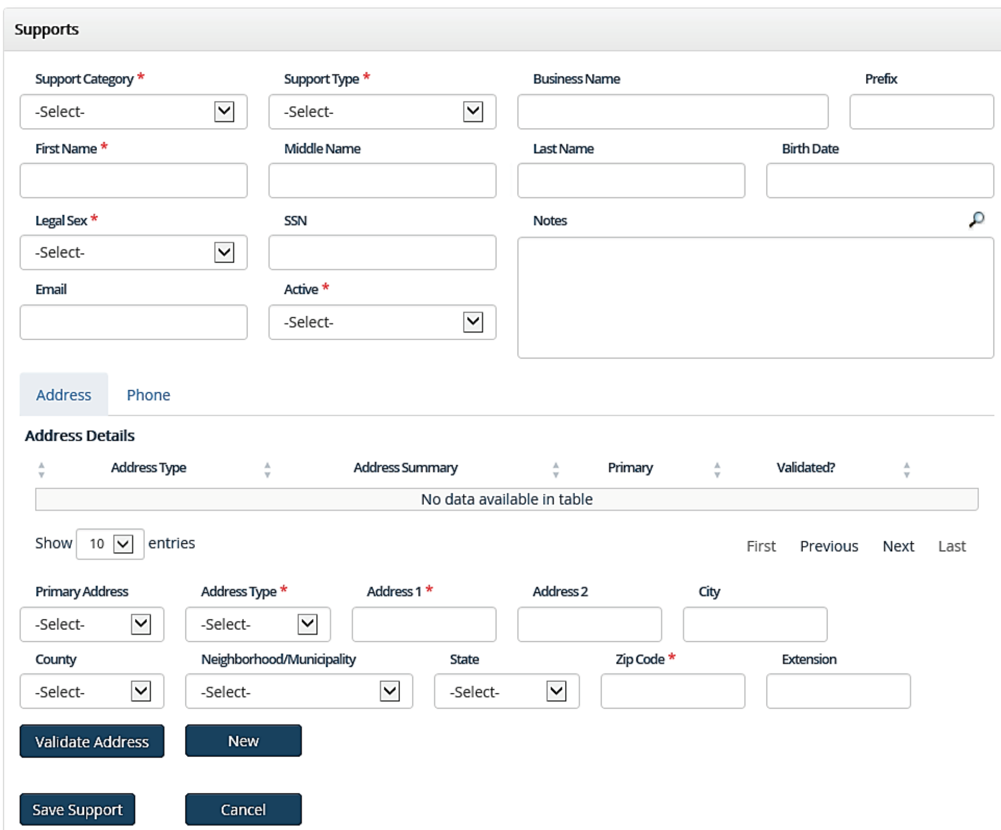
   i. If there is a match in the *Search Result* grid, click the desired person's line in the *Search Result* grid and then click **Add to Case**.

   ii. If none of the results match the person being added, click **Create Support** without selecting anyone from the *Search Results* grid.

e. To close the *Search Support* pop-up without adding a support click **Close**.

Completing the Supports pop-up

1. When **Create Support** or **Add to Case** is clicked the *Supports* pop-up will appear.

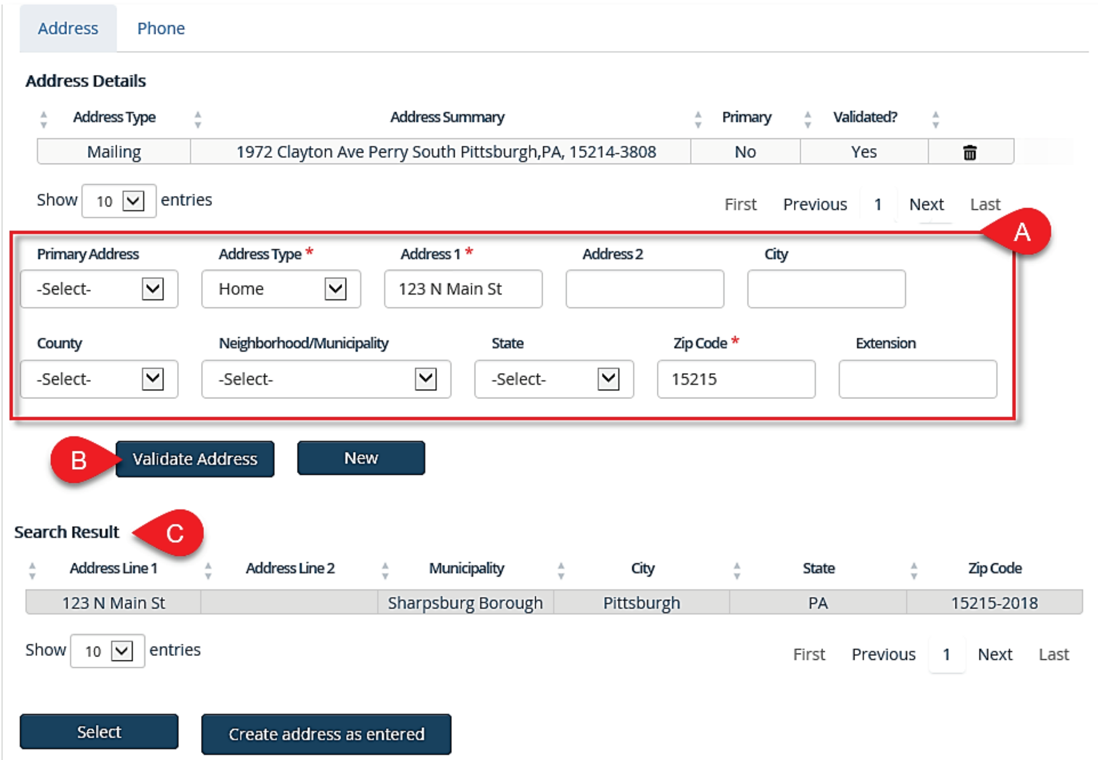


2. Enter all of the relevant information for this Support in the *Supports* pop-up.

   a. The Support can be made Active or Inactive at any time by selecting "Yes" or "No" from the *Active* drop-down.

   b. *Support Category, Support Type, First Name, Legal Sex* and *Active* are all required in order to save a Support entry.

3. *Address* tab: Multiple addresses can be entered for the Support. The Support can also be saved without entering an address.



a. To enter a new address:
   i. Select whether or not the address is the individual's *Primary Address, s*elect the *Address Type*, and enter all of the known address information.

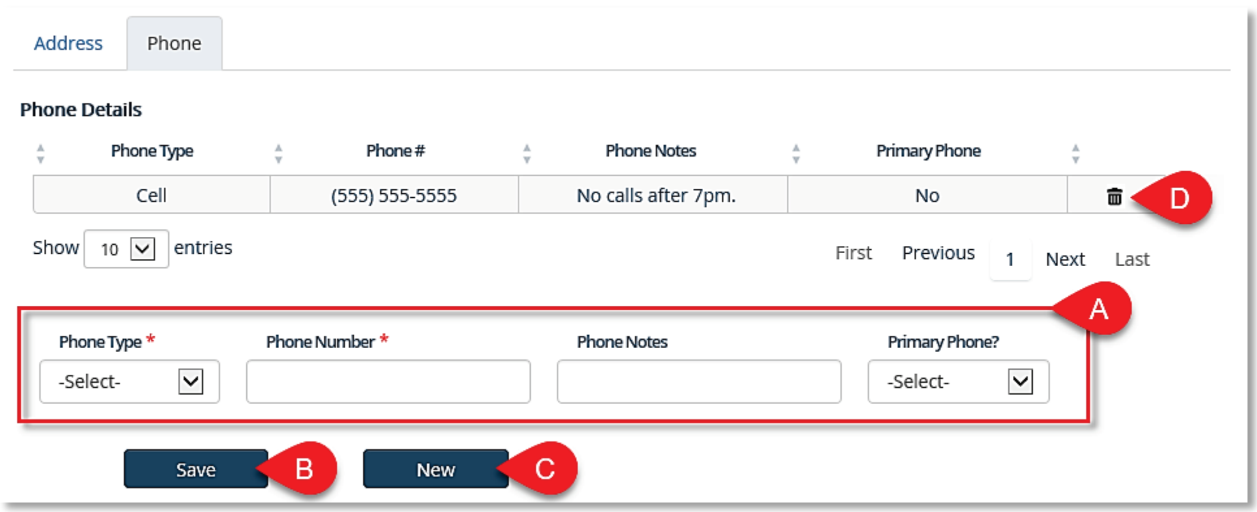
b. Click **Validate Address**.

c. If the *Search Result* list includes the desired address, click on the correct address in the grid and Click **Select**.
   i. If the Correct address is not in the Search Result list, the *Address Information* can be updated and searched for again. To do so, edit the *Address Information* and click **Validate Address**.
   ii. If, after searching again, the address cannot be located in the *Search Result* list, the address can still be saved without validation by clicking **Create address as entered**. The address will appear in the *Address* grid with a "No" in the *Validated?* column to indicate that the Address has not been validated.

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

e. To add a new address, click **New**

4. *Phone* tab: Multiple phone numbers can be entered for the Support. The Support can also be saved without entering a phone number.



a. To add a new phone number, click on the *Phone* tab:
   i. *Phone Type*: Select the type of phone number being entered.

   ii. *Phone Number*: Enter the 10 digit phone number.

   iii. *Phone Notes*: If applicable, enter notes about the phone number.

   iv. *Primary Phone?:* Use the drop-down to indicate whether or not this phone number is the primary phone number for this Support. Note that only one phone number can be marked as primary at any given time.

b. Click **Save** to add this phone number to the *Phone* grid.
   i. To edit an existing phone number, click on the desired number in the grid.

c. To enter additional phone numbers, click **New**.

d. If a phone number has been added in error, click the delete icon [🗑] to the right of the phone number in the *Phone* grid to delete it.

3. When the entire *Supports* pop-up has completed click **Save Support** at the bottom of the pop-up to save the information entered or changed.
   a. Clicking **Cancel** at the bottom of the pop-up will close the pop-up without saving any of the information that was entered or changed.

4. The new Support will now be available to select in the Supports multi-select box.

5. The Support will also automatically be added to the Supports screen.

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 I-Service, go to: https://servicedesk.alleghenycounty.us

This and other Job Aids can be found at: http://s3.amazonaws.com/dhs-application-support/index.htm