



## Supervisor Quick Reference Guide

To search for a person

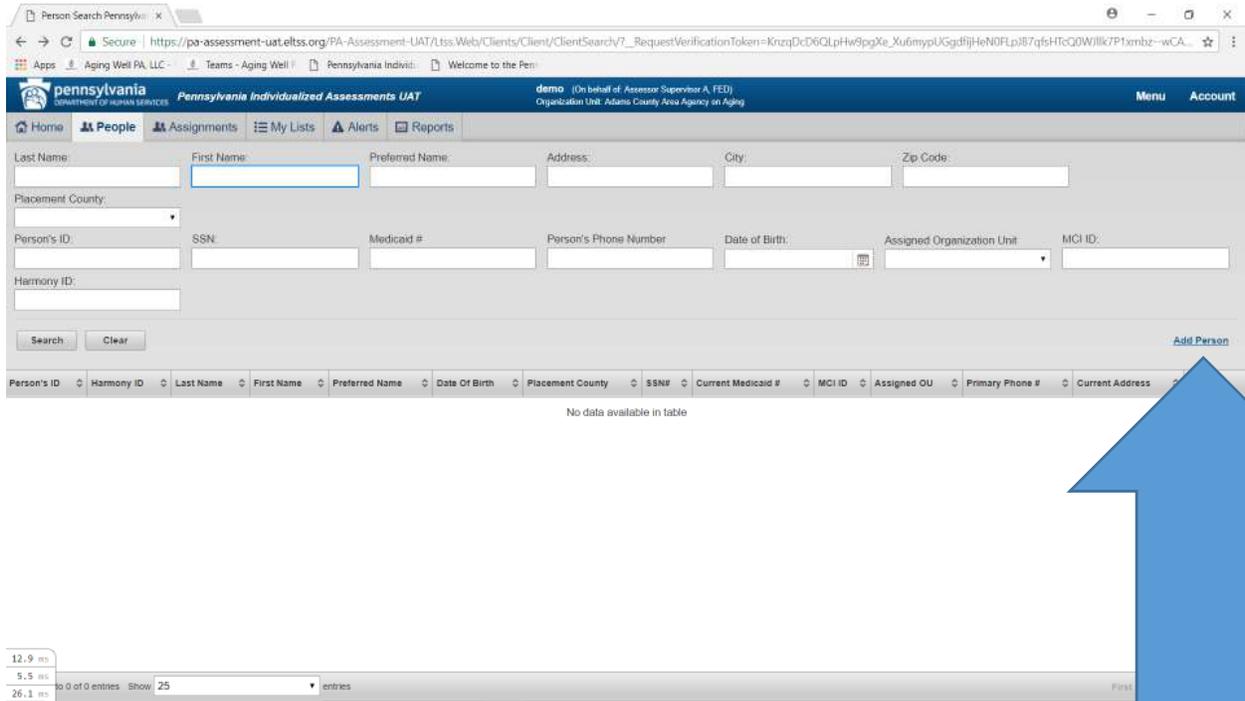
Person's ID	Harmony ID	Last Name	First Name	Preferred Name	Date Of Birth	Placement County	SSN#	Current Medicaid #	MCI ID	Assigned OU	Primary Phone #	Current Address	Actions
25882T00JIV3110		Pepsi	John		05/18/1932	Adams	***-**-0000			Adams County Area Agency on Aging	7777777777	125 Chambersburg road, layetteville 17222	<a href="#">View</a>

### Action Steps

1. Click on the People tab to open the search screen
2. Enter at least one criteria and click on the Search button
3. Search results will show in the section below or a pop-up display indicating a profile does not exist
4. Click on the View link to access the Person's Information

*Tips: Search results include all people with the same name or a similar name. The View link is only available if a person is assigned to the searcher's organization unit (OU). Persons assigned to different OUs will not have the View link.*

## To Add a New person



1. Complete a Search to ensure a profile does not exist
2. Click on the Add Person link or OK in the Create Person Notice pop-up
3. After clicking the Add Person link, the upper left of the screen indicates a New Person is being created. Name, ID, and DOB will be populated after completing the Person's Demographic Information
3. Complete required fields (highlighted in yellow with a red asterisk by the field name) in the Person's Demographic Information

*Tips: After Creating a New Person they will appear under the Alerts Tab*



## Alert Tab

The screenshot displays the Alerts tab in the Pennsylvania Individualized Assessments UAT system. The interface includes a search filter for Start Date (03/21/2018) and End Date (03/21/2018). A table lists one alert for John Pepsi, assigned to AAA OU on 03/21/2018. The alert is bolded, indicating it is new. The table columns are Person, Person's ID, Alert Description, Category, Date, From, and Accepted By.

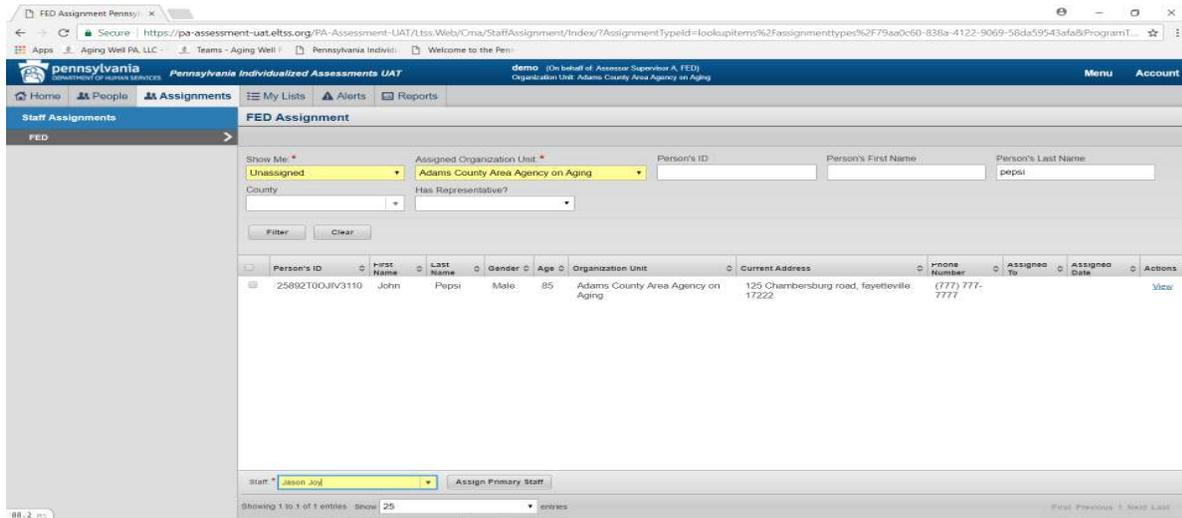
Person	Person's ID	Alert Description	Category	Date	From	Accepted By
<b>John Pepsi</b>	25892700JIV3110	Person is assigned to AAA OU <a href="#">Go</a>	Organization Unit Assignment	03/21/2018	FED Assessor Supervisor A	

## Action Steps

1. Click on the Alerts tab a. If given a choice, click on the Assessment type  
b. Alerts in bold font are new  
c. The most recent alerts are at the top of the screen
2. Click on the Go link at the end of the alert.

*Tips: All FEDs that are assigned to OU will be found in this tab*

## To Assign a FED to an Assessor



The screenshot shows the 'FED Assignment' page in the Pennsylvania Individualized Assessments UAT. The left sidebar has 'Assignments' selected, and 'FED' is highlighted under 'Staff Assignments'. The main content area has a search form with the following fields:

- Show Me: Unassigned
- Assigned Organization Unit: Adams County Area Agency on Aging
- Person's ID: [empty]
- Person's First Name: [empty]
- Person's Last Name: pepsi
- County: [empty]
- Has Representative?: [empty]

Below the search form is a table with the following data:

Person's ID	First Name	Last Name	Gender	Age	Organization Unit	Current Address	Phone Number	Assigned To	Assigned Date	Actions
25892T00JRV3110	John	Pepsi	Male	85	Adams County Area Agency on Aging	125 Chambersburg road, fayetteville 17222	(777) 777-7777			View

At the bottom of the page, there is a 'Start' dropdown menu with 'Jason Joy' selected and an 'Assign Primary Staff' button. The page also shows 'Showing 1 to 1 of 1 entries' and 'Show 25' entries.

### Action Steps

1. Click on the Assignments tab
2. Click on Staff Assignments in the left side menu
3. Click on FED
4. Complete the required fields using the drop-downs:
  - a. Show Me – click on Unassigned
  - b. Organization Unit – click on the applicable OU
5. Input optional information to narrow search results
6. Click on the Filter button
7. Click on the checkbox to the left of the person's information
8. Click on the Staff drop down and click on the staff member's name
9. Click on the Assign Primary Staff button
  - a. This triggers an alert to the staff member conveying the assignment
10. Receive a message the staff member has been successfully assigned to a person

*Tip / Best Practice: View assignments by a staff member prior to assigning staff. This will ensure assignments are distributed as they should, rather than to select staff members.*



- *Show Me: Assigned*
- *Assigned Organization Unit: applicable OU*
- *Staff: use the drop down to identify the staff member*
- *Click on the Filter button*

## To Un-Assign

The screenshot shows the 'FED Assignment' page in the PA- Assessment- UAT system. The search filters are set to 'Assigned' for 'Show Me', 'Adams County Area Agency on Aging' for 'Assigned Organization Unit', and 'pepsi' for 'Person's Last Name'. The table below shows one entry for John Pepsi, assigned to Jason Joy on 3/21/2018. At the bottom, there is a button labeled 'Un-assign all assigned staff'.

Person's ID	First Name	Last Name	Gender	Age	Organization Unit	Current Address	Phone Number	Assigned To	Assigned Date	Actions
25892700JIV3110	John	Pepsi	Male	85	Adams County Area Agency on Aging	125 Chambersburg road, fayetteville 17222	(777) 777-7777	Jason Joy	3/21/2018	<a href="#">View</a>

## Action Steps

1. Click on the Assignments tab
2. Click on Staff Assignments in the left side menu
3. Click on FED
  - a. Available option is based on role
4. Complete the required fields using the drop-downs:
  - a. Show Me – click on Assigned
  - b. Organization Unit – click on the applicable OU
5. Input optional information to narrow search results
6. Click on the Filter button
7. Click on the checkbox to the left of the person's information
8. Click on the Un-assign all assigned staff button
9. Click on the Continue button in the pop-up asking if the staff member is to be un-assigned
10. Receive a message the person has been successfully un-assigned from the staff



## Withdraw a FED

The screenshot shows the 'FED Assessments — Overview' page for John Pepsi. The 'Assessment Request' section is expanded, showing details for a request made by 'FED Assessor Supervisor A' on 03/21/2018, with a due date of 04/04/2018 and a status of 'Pending'. The 'Assessment' section below it shows a 'Current Assessment' that is 'Not Started'. A blue arrow points to the 'Withdraw' button located in the top right corner of the assessment details panel.

### Action Steps

1. Access the Person's Information, Overview screen
2. Click on Assessment in the left menu
3. Click on the Assessment type in the submenu
4. Click on the Summary link to the right of the assessment, located in the Assessment section of the screen
5. Click the Withdraw button

### Withdraw a FED from the IEB

There is currently no mechanism built into PIA to make this notification. When a FED has been withdrawn and the referral came from the IEB, the following email address must be used to notify the IEB of the withdrawal: [IEB-PAEncryptionbox@maximus.com](mailto:IEB-PAEncryptionbox@maximus.com) The title line of the message should be: [county(ies) AAA FED Withdraw Request].