



Allegheny County  
Department of  
Human Services



# Family Center Synergy Guide



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# SYNERGY EXPECTATIONS



# Synergy Expectations

## Data Entry Expectations

- All data for the month must be complete by the 5<sup>th</sup> of the following month.
- **Public group events for the coming month should also be entered by the 5<sup>th</sup> of the month. *THIS IS A CHANGE IN EXPECTATIONS.*** This will allow for advertising on the website and for partners to promote events to interested clients.
- **Recommended best practice is for staff to enter contacts at least weekly.** This also assists in continuity of care across providers who may be viewing contact notes in Synergy.
- **All active cases, including drop-ins, should be MCI-cleared as much as possible.** This assists in coordination of care across providers and reduces duplicate cases. MCI-cleared requirements are:
  - Name
  - Legal sex
  - Birthdate
  - Social Security Number can be used in place of other identifiers

## Client View

- Client View can be used when seeking more information on a family for better service coordination.
- All Site Directors and lead staff (as appropriate) can access Client View. If you need access, please contact your Synergy Specialist or use the link below to the ISAR form.
- Other DHS providers have access to Client View and can see a client's service involvement in a family center or home visiting program, and vice versa.
- No data entry is required for Client View. Data is automatically populated via Synergy.

## Activating and Closing Accounts

- Please use the following Information System Access Request Form (ISAR) to request access or remove access:  
<https://forms.office.com/Pages/ResponsePage.aspx?id=Ej0n4MvksU6fclu6FvuWjdkd9ENJ45IPjwZKc8OF6b5UODBSV043RloyMIUxRktOVE9PRIk2VIBXTC4u>
- Synergy AND Client View can both be requested or removed using this form.
- Please ensure that a supervisor is completing the form for any departing staff member that needs their accounts removed. Please include both Synergy AND Client View on the form as needed. **Please do not select "Disable Account" for any reason.**



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# CASE STATUSES



## Case Statuses

### Pending Cases

- New referrals or cases are listed in Pending status. Cases that are reopened are also listed as pending upon reopening.
- Any case new to your center should be contacted within two business days.
- **Pending is a SHORT-TERM status. Cases should be moved from pending by 30 days.**

## Home Visiting Programs

### Enrolled Cases

- All families should be enrolled or on the waitlist for Home Visiting. Avoid drop-in status for all Home Visiting Program families.
- Enrolled families should receive contact at least once per month.
  - If a family is not responsive after 90 days, consider moving the family to the waitlist.
  - If a family is not responsive for a year, consider closing out the case and transferring the family to a drop-in (family) center.

## Family Center Programs

### Active Cases

- Families are considered “active” if they’re involved in the center at least once per year.
- “Active” families can be either drop-in or enrolled.

#### Case Management or “enrolled” families

- These are families that are “enrolled” in a deeper level of program support (i.e. formal or informal home visits, fatherhood program, Kindergarten Readiness, etc.).
- Staff will likely have a limited number of **enrolled** families assigned to them. Evidence-based home visiting caseloads should be limited to 20-25.
- Programs that are not providing evidence-based home visiting **may have more than 25 enrolled families per caseload**, as these programs are not tied to home visiting fidelity requirements.
- Families receiving case management (aka “enrolled”) are in contact with the center at least once per month.
  - If a family is not responsive after 90 days, the family should be moved off of “case management” services (moved from enrolled to drop-in).

## Family Center Programs (continued)

### Other or “drop-in” families

- Drop-in families should receive an attempted contact once per quarter.
- Families can stay in this category indefinitely, as long as they remain responsive and “engaged” with the center.
- Families in this category should be eligible for the same services as case management families (i.e. van transportation, distribution items while supplies last).
- Any family receiving a one-time service (formula or diaper bank, First Year Cheer pickup, etc.) can be listed as a drop-in. Outreach should continue to this family at least on a quarterly basis.
- Since drop-in families require much less individualized support, there does not need to be a limit on the number of drop-in families on a caseload.

### Inactive Cases

- Families are considered “inactive” if they have not been in contact in one calendar year.
- If the family is likely to return, their case can remain open, but may not be assigned to a worker.
- If the family is unlikely to return, or has not been engaged in several years, the case should be closed.

## Hybrid (Family Center + Home Visiting)

- Follow the above guidance as it pertains to Home Visiting and non-Home Visiting families.



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# REQUIRED INFO





## Required Info

### Home Visiting Programs

#### Required Case Info

- All active cases must be MCI-cleared and enrolled in Home Visiting or on Waitlist.
- Required information for enrolled families:
  - Name
  - Legal Sex
  - Birthdate
  - Phone Number and address for Head of Household (HOH)
  - Emergency Contact phone number (at least one recorded if same for all children)
  - Household Members, including Race/Ethnicity, Pregnancy, and Primary Language
  - Income Source and Frequency for HOH
  - Insurance Type for children
  - Housing Status, Housing Type, and Moved in Last Year for HOH
  - All required Health fields, including Pregnancy tab and Child/Youth Info tab
  - Family Interests (on Summary page, updated yearly)
  - Service Involvement (use the first date of completed evidence-based home visit)
  - Contacts, Group Event attendance, and Referrals recorded completely and consistently
  - ASQ and FAST completion as required by HVP
  - Goal Plan

### Family Center Programs

#### Required Case Info (Drop-in and Enrolled)

- All active cases must be MCI-cleared
- No families should be enrolled in Home Visiting (except for hybrid programs)
- Required information:
  - Name
  - Legal Sex
  - Birthdate
  - Phone Number
  - Contacts, Group Event attendance, and Referrals recorded completely and consistently

#### Highly Encouraged Case Info

The following info is required for families receiving case management services but is highly encouraged for all families. During monitoring, it should be evident that staff attempt to gather much of this information from most families and that the information is updated at least yearly.

- Family Interests (on Summary page, updated yearly)

## Family Center Programs (continued)

### Highly Encouraged case info (continued)

- Household members, including Race/Ethnicity and Pregnancy
- ASQ, FAST, or goal plan completed for families receiving case management
- Service Involvement
- In Health, Pregnancy tab completed

## Hybrid (Family Center + Home Visiting)

### Required Case Info

- Families receiving evidence-based home visiting should be enrolled in Home Visiting and have all Required Home Visiting fields completed.
- Families not receiving evidence-based services should not be enrolled in Home Visiting.
- Families receiving home visiting services from a nurse on staff can be enrolled in Home Visiting.
- Refer to Required and Highly Encouraged Case Info for Family Center programs for all other families.



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# CONTACT NOTES



# Contact Notes

## Contact Note Expectations

- A contact is an **interaction** between a staff and client(s). When an interaction occurs or is attempted, this should be documented in Synergy as a contact note.
- All contacts for the month must be documented by the 5<sup>th</sup> of the following month.
- Recommended best practice is for staff to enter contacts at least weekly. This also assists in continuity of care across providers who may be viewing contact notes in Synergy.

## Contact Statuses

- All contacts must be designated with either an “Attempted” or “Completed” contact status.

### Attempted Status

- A contact should be marked as “Attempted” if:
  - It DOES require a response but the client you are attempting to contact never responds or does not respond before you document the contact in Synergy
    - Ex: You call the family at 1 PM and leave a voicemail. The family never returns your call.
    - Ex: You call the family at 1 PM and leave a voicemail. As of 3 PM, you have not received a response. At 3 PM, you document the contact in Synergy with an “attempted” status.
- Other Examples of an “Attempted” Contact:
  - Home visit or child engagement activity was cancelled, re-scheduled, or did not occur as planned, meaning you and the family did not meet and complete an approved home visiting model/activity.
  - Unsuccessful phone conversation with a family, meaning the family did not answer your call so no interaction occurred (i.e. staff left a voicemail).
  - No interaction occurred when dropping off materials at the family’s home.
  - You sent a text or social media message about a program and did not receive a response, or response was minimal (i.e. the family responded “Thanks!”).

### Completed Status

- A contact should be marked “Completed” if:
  - You are successful in contacting the client immediately
    - Ex: You call the family at 1 PM and the family answers your call. After speaking with the family, you document the contact in Synergy with a “completed” status.
  - The client responds before you document the contact in Synergy
    - Ex: You call the family at 1 PM and leave a voicemail. The family returns your call at 3 PM. After speaking with the family, you document the contact in Synergy with a “completed” status.
- Other Examples of an “Completed” Contact:

- Completed home visit or child engagement activity, meaning you met with the family either in-person or virtually and delivered an approved home visiting model/activity.
- Back-and-forth interaction with a family via text, messenger, email, etc.
- In-person interaction with the family during a center visit, drop off of materials, etc.

#### Contacts that DO NOT require a response

- Contacts that DO NOT require a response (i.e., those with a Type/Location of “Email, letter, fax, or social media post” and/or Purpose of Contact of “Announcement/Notification/Newsletter”) DO NOT need to be entered into Synergy as it is an expectation that this outreach is regularly occurring.
- Some programs may document these contacts for supervision and/or record-keeping purposes. While it is okay to document these contacts, they will not be captured in the monthly report as they are not a measure of engagement.
- Examples of contacts that do not require a response and/or documentation:
  - Dropping off a newsletter at the family’s home
  - Sending a text or leaving a voicemail about an upcoming event
  - A social media post advertising an upcoming event or program at the center
  - Electronic distribution of a newsletter

## Indirect Contacts

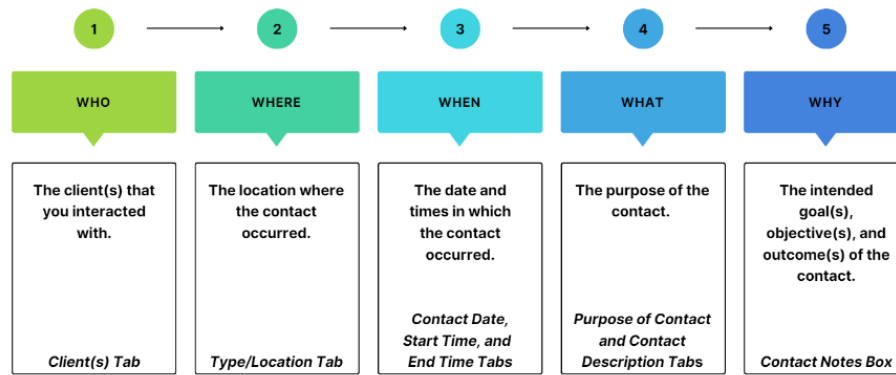
- Staff can document conversations with other providers about a client if desired. Examples could include:
  - A referral or warm handoff to a partner agency
  - Staff call to check in on the status of an application for the family
  - Staff have a conversation with a referring partner to gather more information on a family (and the family has consented to information sharing).
- This information can be documented for record-keeping purposes but is not required.

# Contact Notes Documentation

## Documentation Expectations

- Specific information should be included in contact notes to ensure that best practices are being followed, cases can be transferred to other workers or centers without questions or concerns, etc.
- While various documentation formats exist, following the 5 W's is an easy way to ensure adequate information is provided.
  - The 5 W's are Who, What, Where, When, Why
    - Please note: Some information is already captured in the drop-downs and does not need to be noted in the narrative section in Synergy.
  - The chart below outlines what information is needed and what tabs in Synergy correspond with each "W". Follow the chart and contact note example below when documenting case notes in Synergy.

## The 5 W's of Contact Notes



**WHEN**

**WHERE**

**WHO**

**WHAT**

**WHY**

**Contact Activity**

Contact Date \* 02/06/2023 Start Time \* 12:00 pm End Time \* 01:00 pm

Travel Time \* 15 minutes Type/Location \* Face to Face Home of Origin - Child Present Please specify

Contact Status \* Completed Notification \* Announced

Purpose of contact \* Approved Home Visiting Model

Clients \*\* Synergy\_Test (Self) (2/6/2000) Supports \*\* Minimally Involved 3rd Party

Change Log New Support

Contact Description \* Home Visit

Contact Notes \* I met with Sarah, James, and Mary in their home. We started the visit by reading the book "Clifford the Big Red Dog". After reading the book, we completed the PAT handout/activity "Helping Your Child Learn to Cut". I showed Mary how to roll play-doh and Sarah helped her move her hands to roll it into "snakes". After rolling out the play-doh, I showed Mary how to cut the doh with the scissors. Sarah and James sat behind Mary and showed her how to hold, open, and close the scissors. We also counted the number of cuts she made in the doh- Mary is able to count to 11. We



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# PURPOSE OF CONTACT



## Purpose of Contact Value Examples

When documenting contacts in Synergy, staff should select the “purpose of contact” value that most closely aligns with the type of information, service, and/or support that was provided to the client(s). The following examples portray common interactions that staff have with families and the corresponding value in which the interaction should be documented as.

### Announcement/Notification/Newsletter

- Monthly newsletter
- Mass communication/messaging surrounding center programming/events
- Any type of contact that would fall under the Type/Location of “Email, letter, fax, or social media post”

### Assessment/Screening

- ASQ
- ASQ-SE
- FAST

### Benefits Enrollment

- Assistance with enrolling in:
  - SNAP
  - WIC
  - Healthcare (CHIP, Medicare, Medicaid)
  - Other public benefits

### Concrete goods

- Food pantry
- Footbridge
- Car seats/cribnettes
- RHRT
- Diapers
- Formula
- Event and/or programming materials

### Evidence-based home visit

- Home visit using PAT
- Nurturing Parenting
- FACT

### Initial outreach

- Outreach to Synergy referral/pending cases
- First touchpoint with new client/family
- Enrollment information gathering

### Parenting/child development support

- Parenting education/parenting classes



## Reengagement

Reengagement constitutes an interaction in which staff have not had ongoing contact with a family (i.e. outreach or “check-ins”). A reengagement contact may be equivalent to a staff person checking in with the family, asking if they are in need of any resources, and/or providing them with information on a group event. It does NOT include any service coordination.

Reengagement also may include staff outreach to a client who has been unresponsive and staff are trying to schedule a visit or reengage the family.

- Outreach to drop-in clients (once per quarter)
- Outreach to enrolled clients (once per month)
- Reconnecting with home visiting families who have lost contact

## Service Coordination/Resource and Referral

- Connecting families with outside supports/services such as:
  - Basic needs
  - Child care
  - Community supports
  - Early intervention
  - Education/training
  - Employment
  - Financial assistance
  - Food assistance
  - Mental health treatment
  - Transportation
  - Utilities
  - Etc.- other related supports/services

## Transportation

Any instance where a family is transported by the van, including:

- Providing transportation to/from programming
- Transportation to appointments for enrolled families

Transportation does NOT include drop-offs of materials or concrete goods. Drop-offs of materials should be documented as “concrete goods”.



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# GROUP EVENTS



# Group Events

## Group Event Entry Expectations

- Group events should be listed **PRIOR** to the event occurring, ESPECIALLY for events that are open to the public. **THIS IS A NEW EXPECTATION.**
- Events should be advertised to the public as much as possible. **THIS IS A NEW EXPECTATION.** Please select “Open to the Public” in Synergy for the following to be publicized on the website:
  - Distribution events (diapers, food)
  - Social activities such as Family Fun Nights
  - Events not requiring registration
- It is highly encouraged that all known attendees are added as participants. This will ensure a contact note is recorded for each attendee. **THIS IS A CHANGE IN EXPECTATIONS.**
- Do not enter an individual contact note for participation in a group event since a contact note will automatically generate for all participants.
  - *If staff have an interaction with the family during the event that requires documentation, staff should edit the automatically generated contact note instead of creating a new note.*

The following are considered group events:

- Any event that the center assisted in planning and facilitating, even in collaboration with other agencies.
  - Ex) Beverly’s Birthdays parties
  - Ex) The center coordinates a Back-to-School event and helps facilitate activities in collaboration with other community partners, even if the event occurs at another community location.
- Any distribution event, whether the distribution occurred on site or by delivery. For example:
  - Diapers delivered by van or given out at the center
  - 412 Food Rescue distributed by van or at the center
  - First Year Cheer pickup and delivery
- Parent Cafés, PAT Parenting groups, and Nurturing Parenting groups
- Parent-child interaction groups, Kindergarten Readiness programs
- Any event that is widely offered but only has one family in attendance
- An event that occurs at the center that staff are present for and assist with, even if enrolled families do not attend. In this instance, add the Facilitator as a Non-Worker.
  - Ex) Kids’ Club and Moms’ Empowerment

**\*\*HELLO BABY BAG DELIVERIES SHOULD ALWAYS BE RECORDED AS A GROUP EVENT. PLEASE RECORD ALL NAMES OF THE DELIVERIES, NOT JUST THE NUMBER OF NON-FSC ATTENDEES.\*\***

The following is NOT considered a group event:

- Events that are planned and operated by a separate program (not within the family center) and families were simply recruited for the event. Contact notes may be recorded for individual families who attend.
  - Ex) The local library hosts a story time. The family center advertises the story time in their newsletter, but has no role in planning or facilitating. Some family center families attend, but on their own and with no coordination from the family center.
  - Ex) Another agency in the building hosts a resource fair. The family center attends and distributes resources, but does not host the event.
- An activity that only one family is invited to, even if multiple family members attend.
  - Ex) A supervised visit or home visit occurring at the center
- Any support offered or provided to only one family.

## Events that are “Open to the Public”

- Any event that is open to the public will be advertised on the Family Center website Events calendar (<https://familycenters.alleghenycounty.us/events/>).
- Public events should be added to the Synergy calendar **PRIOR** to the event occurring, **by the 5<sup>th</sup> of the month**.
- Public events should be listed in Synergy in the same way they are advertised on your newsletter. Please use the following guidance:
  - *Event title* – the event title should be somewhat self-explanatory and give some indication of who the audience is for the event. Please refrain from acronyms or other jargon that the public may not be familiar with.
  - *Date and time*
  - *Event details* – Please include “Hosted by the XX Family Center” at the beginning of your public event details. Also include a detailed description of the event that clearly states:
    - **WHO** the event is for
    - **WHAT** the event will entail
    - **WHERE** the event will take place
    - **RSVP** information (if needed)
    - Example:

*Cuddle Time*

*May 3, 2023*

*11:00am-12:00pm*

*Hosted by the Hill District Family Center. Please join us at the center for “Cuddle Time”, a program for non-walking infants and their parent/caregiver. We will use the Nurturing Parenting curriculum and incorporate the Parents As Teachers curriculum. You can enjoy floor time activities, practice infant massage and learn about your baby’s development. You can also chat with other parents about the joys and challenges of taking care of an infant!*

*Please contact (staff person) at (email) if you'd like to attend!*

## Canceling and Finalizing events

- If the event is cancelled, finalize the event but do not enter any attendance. This keeps a record of the planned event.
- If the event is rescheduled, delete the original and create a new event.
- If no participants show up for an event, enter 0 attendees and finalize the event.

## Event Attendance

- If another provider holds the event at the center and no roster is available, record the attendance in "Number of Non-FSC Attendees".
- When adding attendee names, DO NOT include them in the count of "Number of Non-FSC Attendees". This will cause an incorrect attendance count.
- After entering attendance, be sure to save the event as Final.
- Once an event is finalized, the applications specialist is able to make changes if needed.



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# ACRONYM GLOSSARY



## Family Center Acronym Glossary

504	Section 504 plan for children with disabilities in schools
ACDHS	Allegheny County Dept of Human Services
ACHD	Allegheny County Health Dept
ACJ	Allegheny County Jail
AFIT	Alliance for Infants and Toddlers
AFN	Allegheny Family Network
AIU	Allegheny Intermediate Unit
ASQ	Ages and Stages Questionnaire
ASQ: SE	Ages and Stages Questionnaire: Social Emotional
BB	Beverly's Birthdays
CAO	County Assistance Office
CCIS	Child Care Information Services (subsidy)
CCW	Child Care Works (subsidy)
CDS	Child Development Specialist
CHP	Children's Hospital of Pittsburgh
CPS	Child Protective Services
CQI	Continuous Quality Improvement
CV	Community Voices
CYF	Children, Youth, & Families
D&A	Drugs & Alcohol
DOB	Date of Birth
DV	Domestic Violence
EI	Early Intervention
ELRC	Early Learning Resource Center
EHS	Early Head Start
ERAP	Emergency Rental Assistance Program
FAST	Family Advocacy and Support Tool
FACE	Macedonia FACE
FACT	Family and Community Teaming
FC/FSC	Family Center/Family Support Center
FCC	Family Care Connections
FCU	Family Check Up
FDS	Family Development Specialist
FOR	Focus on Renewal
HB	Hello Baby
HBSN	Hello Baby Support Network
HS	Head Start
HV	Home Visit

IEP	Individualized Education Plan
KR	Kindergarten Readiness
LIHEAP	Low Income Home Energy Assistance Program
MCH	Maternal Child Health
NLSA	Neighborhood Legal Services Association
NP	Nurturing Parenting
OUD	Opioid Use Disorder
PAC	Parent Advisory Council
PADHS	Pennsylvania Dept of Human Services
PAT	Parents as Teachers
PPS	Pittsburgh Public Schools
PRM	Predictive Risk Model (Hello Baby)
PEI	Preschool Early Intervention (Previously DART)
RN	Resource Navigator
RHRT	Real Help Real Time
SD	Site Director
SHIM	South Hills Interfaith Movement
SNAP	Supplemental Nutrition Assistance Program
SSDI	Social Security & Disability Insurance
SUD	Substance Use Disorder
TANF	Temporary Assistance for Needy Families
TFI	Touching Families Inc (FACT provider)
TT	Trying Together
ULPGH	Urban League Greater Pittsburgh
WIC	Women, Infants, and Children
WPADB	Western PA Diaper Bank
YOC	Year of Cheer