

Case - Contact Info - DHSSSP Job Aid

The Participant and Household Members' contact information, including address, phone number and email can be documented and viewed on the *Contact Info* screen.

Contact Info screen Jane Smith Dashboard Search Reports COPOS Indicator-Quick Entry Self-Sufficiency Program Case Information Case Summary *Denotes Required Fields **Denotes Half Mandatory Fields Ctrl + Click to Multi-Select and Deselect Summary Program: DHS Self-Sufficiency Program Household Case ID Case Name * Case Open Date Assigned Worker 129 November 07/01/2016 KDTEST18, Ni✓ Contact Info > Last Recertification Receives Food Stamps? Family Type Family Size Demographics 07/01/2017 Single Parent Eligibility **Document Folder** Involvement ✓ Contact Info Supports Relationship to Birth Date Participant > Tracking 05/01/1988 October November Female Self Utilities January November Female 05/05/2005 Daughter First Previous 1 Next Last Address Phone Other Add Address 123 N Main St Sharpsburg Borough Pittsburgh, PA, 15215-Home Yes Show 10 🗸 entries Next Last

Navigation

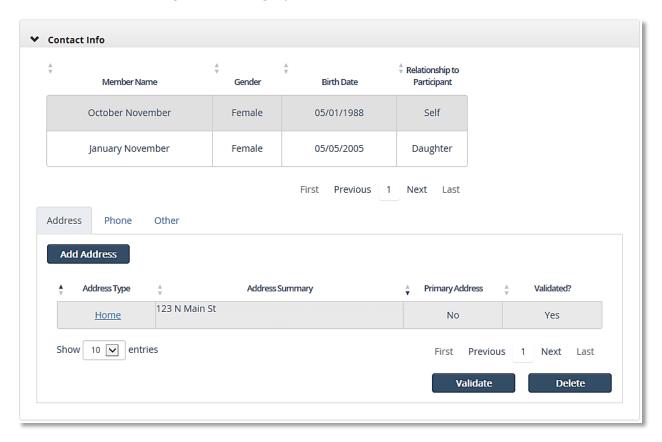
1. Bring the Case into focus and navigate to

Contact Info

Contact Info

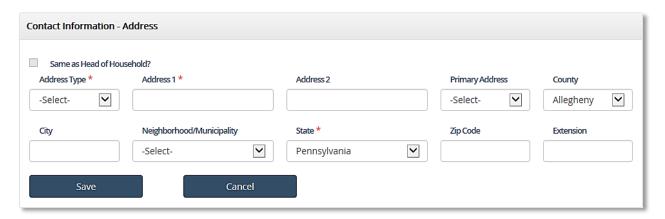
Contact Info – Address tab

1. Select an individual from the *Contact Info* grid by clicking on that individual's name. That individual's line in the grid will turn grey to show that it has been selected.



- 2. In the Address tab below the Contact Info grid, update or document the individual's address information:
 - a. To view or edit an existing address click on the Address Type of the desired address.
 - b. Click Add Address to add a new address.
 - c. Click Validate to validate the selected address.
 - d. Click Delete to delete the selected address.

3. Completing the *Contact Information – Address* pop-up:



- a. Using the Same as Head of Household? checkbox: Once the address of the Participant (the individual with a Relationship to Participant that is listed as "Self") has been saved and validated this checkbox can be used on other Household Member's Address tabs to copy over the Participant's address. The Validate button will still need to be used in order to save the information to the Address tab.
- b. Select the *Address Type* whether or not the address is the individual's *Primary Address*. Enter all of the known address information.

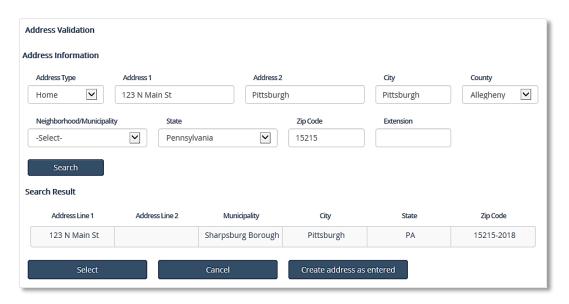
Note: when the address is validated the Neighborhood/Municipality will be identified in the *Address Validation Search Result* list.

- i. Click Save to save the information entered and close the pop-up.
- ii. Clicking will close the pop-up without saving any information that was entered or edited.

Important Note: Any household address with a Neighborhood/Municipality that is within the Pittsburgh City limits (Pittsburgh Ward #, etc.) will cause the Participant to be marked as ineligible on the Eligibility screen.

The Neighborhood/Municipality MUST be entered to calculate eligibility.

- 4. Validating the address: When an address is validated, Synergy compares the entered information to the postal code address list and generates a list of possible addresses formatted properly. The Validation process will also automatically include the *Municipality* in the *Search Result* grid.
 - a. Click on the desired addresses' line in the *Address Information* grid and click to open the *Address Validation* pop-up. The *Search Result* grid will already be populated with the possible search results.



- i. If the Search Result list includes the desired address, click on the correct address in the grid. The Address Validation pop-up will close and the selected address will appear in the Address grid with a "Yes" in the Validated? column to indicate that the Address has been validated.
- ii. If the correct address is not in the Search Result list, the Address Information can be updated and searched again. To do so, edit the Address Information and click

 Search
- iii. If, after searching again, the address cannot be located in the Search Result list the address can still be saved without validation. To do so, click

 Create address as entered

 The Address Validation pop-up will close and the selected address will appear in the Address grid with a "No" in the Validated? column to indicate that the Address has not been validated.
- iv. Clicking will close the *Validate Address* pop-up without validating or changing any information.

5. To delete an address, click on the desired addresses' line in the *Address Information* grid and click

Delete Confirmation pop-up will appear:

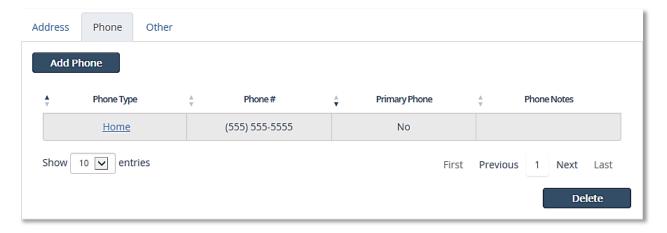


Clicking Yes will delete the address.

Clicking will cancel the action and the address will not be deleted.

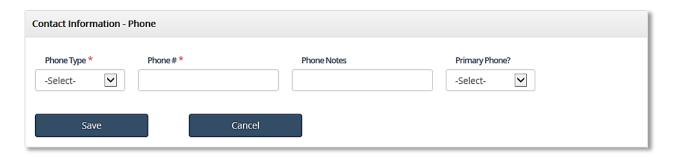
Contact Info – Phone tab

- 1. Select an individual from the *Contact Info* grid by clicking on that individual's name. That individual's line in the grid will turn grey to show that it has been selected.
- 2. Click on the Phone tab below the *Contact Info* grid to update or document the individual's phone number information:



- a. To view or edit an existing phone number click on the *Phone Type* of the desired number.
- b. Click Add Phone to add a new phone number.
- c. Click Delete to delete the selected phone number.

3. When entering or updating a new phone number: enter or update the following information in the *Contact Information – Phone* pop-up:



- a. Phone Type: Select the type of phone from the drop-down.
- b. Phone #: Enter the 10-digit phone number.
- c. *Phone Notes*: Enter notes about the phone number (if needed) such as: "Only use this phone number after 7PM."
- d. Primary Phone?: Select "Yes" or "No" from the drop-down.
- e. Click Save to save the information entered and close the pop-up.
- f. Clicking will close the pop-up without saving any information that was entered or edited.
- 4. To delete a phone number, click on the desired phone number's line in the *Phone* grid and click Delete Confirmation pop-up will appear:

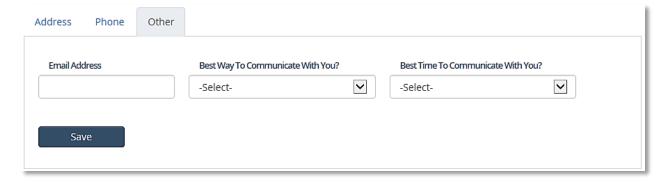


Clicking Yes will delete the address.

Clicking will cancel the action and the phone number will not be deleted.

Contact Info - Other tab

- 1. Select an individual from the *Contact Info* grid by clicking on that individual's name. That individual's line in the grid will turn grey to show that it has been selected.
- 2. Click on the other tab below the *Contact Info* grid to update or document the individual's email address and communication preferences:



- a. Email Address: Enter an Email Address for the individual (if known).
- b. *Best Way To Communicate With You?*: Select the best way to communicate with the individual from the drop-down.
- c. Best Time To Communicate with You?: Select the best time to reach the individual from the drop-down.
- d. Click Save to save the entered or edited information.

For more information...

For assistance, please contact the Allegheny County Service Desk at <u>ServiceDesk@AlleghenyCounty.US</u> 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