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

Navigation

1. Bring the Case into focus and navigate to **Case Information** → **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:

Contact Information - Address

☐ Same as Head of Household?

Address Type *	Address 1 *	Address 2	Primary Address	County
-Select-			-Select-	Allegheny

City	Neighborhood/Municipality	State *	Zip Code	Extension
	-Select-	Pennsylvania		

Save   Cancel

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 **Cancel** 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 **Validate** to open the *Address Validation* pop-up. The *Search Result* grid will already be populated with the possible search results.

Address Validation

Address Information

Address Type	Address 1	Address 2	City	County
Home ☑	123 N Main St	Pittsburgh	Pittsburgh	Allegheny ☑

Neighborhood/Municipality	State	Zip Code	Extension
-Select- ☑	Pennsylvania ☑	15215	

Search

Search Result

Address Line 1	Address Line 2	Municipality	City	State	Zip Code
123 N Main St		Sharpsburg Borough	Pittsburgh	PA	15215-2018

Select	Cancel	Create address as entered

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 **Cancel** 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]. A *Delete Confirmation* pop-up will appear:

   Delete selected address information?

   [Yes]   [No]

   Clicking [Yes] will delete the address.

   Clicking [No] 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:

   | Address | Phone | Other |

   [Add Phone]

Phone Type	Phone #	Primary Phone	Phone Notes
Home	(555) 555-5555	No	

   Show [10] entries   First   Previous   1   Next   Last

   [Delete]

   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:

Contact Information - Phone

Phone Type *	Phone # *	Phone Notes	Primary Phone?
-Select- ▾			-Select- ▾

Save   Cancel

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

Delete selected phone information?

Yes   No

Clicking **Yes** will delete the address.
Clicking **No** 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:

Address	Phone	Other

Email Address

Best Way To Communicate With You?
-Select-

Best Time To Communicate With You?
-Select-

[Save]

   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 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