



## 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

Dashboard Search Reports Case Contact-Quick Entry Jane Smith

COPOS Indicator-Quick Entry

**Case Information**

Summary

Household

**Contact Info**

Demographics

Eligibility

Document Folder

Involvement

Supports

Tracking

Utilities

**Case Summary**

\*Denotes Required Fields \*\*Denotes Half Mandatory Fields Ctrl + Click to Multi-Select and Deselect

Program: DHS Self-Sufficiency Program

Case ID Case Name \* Case Status \* Case Open Date Assigned Worker

129 November Open 07/01/2016 KDTEST18, N

Last Recertification Date Next Recertification Date Receives Food Stamps? \* Family Type \* Family Size

07/01/2017 Yes Single Parent 2

Save Snapshot

**Contact Info**

Member Name	Gender	Birth Date	Relationship to Participant
October November	Female	05/01/1988	Self
January November	Female	05/05/2005	Daughter

First Previous 1 Next Last

Address Phone Other

Add Address

Address Type	Address Summary	Primary Address	Validated?
Home	123 N Main St Sharpsburg Borough Pittsburgh, PA, 15215-2018	No	Yes

Show 10 entries First Previous 1 Next Last

Validate Delete

### 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.

▼ Contact Info

Member Name	Gender	Birth Date	Relationship to Participant
October November	Female	05/01/1988	Self
January November	Female	05/05/2005	Daughter

First Previous 1 Next Last

Address Phone Other

Add Address

Address Type	Address Summary	Primary Address	Validated?
<a href="#">Home</a>	123 N Main St	No	Yes

Show 10 entries First Previous 1 Next Last

Validate

Delete

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 **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: Home ☒ Address 1: 123 N Main St Address 2: Pittsburgh City: Pittsburgh County: Allegheny ☒  
Neighborhood/Municipality: -Select- ☐ State: Pennsylvania ☐ Zip Code: 15215 Extension:   
**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.



- 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

- 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.
- 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**

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

The form is titled "Contact Information - Phone". It contains four fields: "Phone Type \*" with a dropdown menu showing "-Select-"; "Phone # \*" with a text input field; "Phone Notes" with a text input field; and "Primary Phone?" with a dropdown menu showing "-Select-". At the bottom, there are two buttons: "Save" and "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  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 . A *Delete Confirmation* pop-up will appear:

The pop-up is titled "Delete selected phone information?". It contains two buttons: "Yes" and "No".

- Clicking  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:

The screenshot shows a web interface with three tabs: Address, Phone, and Other. The 'Other' tab is active. Below the tabs is a form with three fields: 'Email Address' (a text input), 'Best Way To Communicate With You?' (a dropdown menu showing '-Select-'), and 'Best Time To Communicate With You?' (a dropdown menu showing '-Select-'). A 'Save' button is located at the bottom left of the form.

- 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](mailto: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>