



Case – Demographics – DHSSSP Job Aid

The Participant and Household Members' demographic information, including income, insurance, disability, education, working status, housing, and other characteristics are all documented on this screen. Income documented on this screen will factor into Eligibility calculations.

Demographics screen

The screenshot shows a web interface for the 'Demographics' section. At the top, there is a header 'Demographics' with a dropdown arrow. Below it is a table with four columns: 'Member Name', 'Gender', 'Birth Date', and 'Relationship to Participant'. The table contains two rows of data. Below the table, there is a 'Show' dropdown set to '10' and 'entries', followed by navigation links: 'First', 'Previous', '1', 'Next', and 'Last'. At the bottom, there is a row of tabs: 'Income', 'Insurance', 'Disability', 'Education', 'Working Status', 'Housing', and 'Other Characteristics'. The 'Income' tab is currently selected.

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

Show 10 entries First Previous 1 Next Last

Income Insurance Disability Education Working Status Housing Other Characteristics

Navigation

1. From the **Dashboard**: Locate the desired Case and click on the *Case ID* to bring the Case into focus.
 - a. Click on the **Case Information** tile. Then click on the **Demographics** tile.



Demographics – Income tab

Demographics

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

Show 10 entries First Previous 1 Next Last

Income Insurance Disability Education Working Status Housing Other Characteristics

Add Income

Income Source	Income Amount <i>Over a 30-day period</i>	Location	Start Date	End Date
Child support	300.00		7/1/2016	

Show 10 entries First Previous 1 Next Last

Total Monthly Income \$ 300.00

Delete

1. Select an individual from the *Household 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 **Income** tab below the *Household Info* grid, update or document the individual's income information:
 - a. View/Edit: To view or edit existing income information click on the *Income Source* of the desired entry in the grid.
 - b. New: Click **Add Income** to add a new source of income.
 - c. Delete: Click on the line in the grid of the item and then click **Delete**.
A confirmation pop-up will appear: Clicking **Yes** will delete the item.
Clicking **No** will cancel the action and the item will not be deleted.

Confirm Delete

Clicking Yes will delete this record.
Are you sure you want to proceed?

Yes **No**



3. Completing the *Demographics – Income* pop-up:

- a. *Location*: If applicable, enter the location from which the income is received.
- b. *Start Date and End Date*: If known, enter the Start Date for this income source.
If applicable, enter the End Date for this income source.
- c. *Income Source*: Select the type of income being documented from the drop-down.
If the type selected is "Non-Cash Benefit" then select the type from the *Non-Cash Benefit Type* drop-down.
If the type selected is "Other source" then enter the type of income in the *Other Income Source* field.
- d. *Income Amount*: Enter the Income amount for this income source within the latest 30 day period.
- e. Click **Save** to add the entry to the grid and close the pop-up.
Clicking **Cancel** will close the pop-up without saving any information that was entered or updated.

4. The *Total Monthly Income \$* will be calculated based the total income received within the latest 30-day period. Synergy calculates this based on the start and end dates of all of the income documented and the amount(s) entered.



Demographics – Insurance tab

1. Click on the **Insurance** tab to update or document the selected individual's insurance information:

- a. View/Edit: To view or edit existing insurance information click on the *Insurance Type* of the desired entry in the grid.
- b. New: Click **Add Insurance** to add a new insurance type.
- c. Delete: Click on the line in the grid of the item and then click **Delete**.
A confirmation pop-up will appear: Clicking **Yes** will delete the item.
Clicking **No** will cancel the action and the item will not be deleted.

2. Completing the *Demographics – Insurance* pop-up:

- a. *Insurance Type*: Select the type of insurance the individual has.
- b. *Notes*: If applicable, enter notes about the individual's insurance. The *Notes* narrative will become mandatory if the Insurance Type selected is "Other".
- c. Click **Save** to add the entry to the grid and close the pop-up.
Clicking **Cancel** will close the pop-up without saving any information that was entered or updated.



Demographics – Disability tab

1. Click on the **Disability** tab to update or document the selected individual's Disability information:

- a. View/Edit: To view or edit existing disability information click on the *Disability Type* of the desired entry in the grid.
- b. New: Click **Add Disability** to add a new disability type.
- d. Delete: Click on the line in the grid of the item and then click **Delete**.
A confirmation pop-up will appear: Clicking **Yes** will delete the item.
Clicking **No** will cancel the action and the item will not be deleted.

2. Completing the *Demographics – Disability* pop-up:

- a. *Disability Type*: Select the type of disability to document.
- b. *Notes*: If applicable, enter notes about the Disability. The *Notes* narrative will become mandatory if the *Disability Type* selected is "Other".
- c. Click **Save** to add the Disability Information to the *Disability Information* grid.
Click **Cancel** to close the pop-up without saving any information or changes.



Demographics – Education tab

1. Click on the **Education** tab to update or document the selected individual's Education Information:

Income Insurance Disability **Education** Working Status Housing Other Characteristics

Add Education

Highest Education Level Achieved	Student?	Do you have a delinquent education loan(s)?
HS Grad/GED	No	No

Show 10 entries First Previous 1 Next Last **Delete**

- a. View/Edit: To view or edit existing Education information click on the *Highest Education Level Achieved* of the desired education line in the grid.
- b. New: Click **Add Education** to add a new education entry.
- e. Delete: Click on the line in the grid of the item and then click **Delete**.
A confirmation pop-up will appear: Clicking **Yes** will delete the item.
Clicking **No** will cancel the action and the item will not be deleted.

2. Completing the *Demographics – Education* pop-up:

Demographics - Education

Highest Education Level Achieved * **A** Do you have a delinquent education loan(s)? * **B** Student? * **C**

-Select- -Select- -Select-

Save **Cancel**

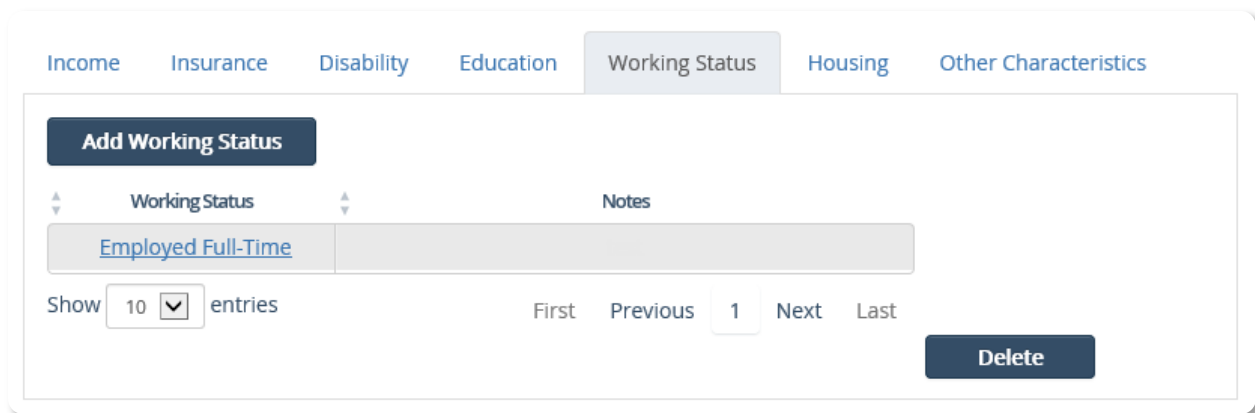
- a. *Highest Education Level Achieved*: Select the highest level of education the individual has completed.
- b. *Do you have a delinquent education loan(s)?*: Answer whether or not the individual has any delinquent education loans using the drop-down.



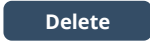
- c. *Student?*: Indicate whether or not the individual is a student by selecting “Yes” or “No” from the drop-down.
- d. Click  to add the entry to the grid and close the pop-up.
Clicking  will close the pop-up without saving any information that was entered or updated.

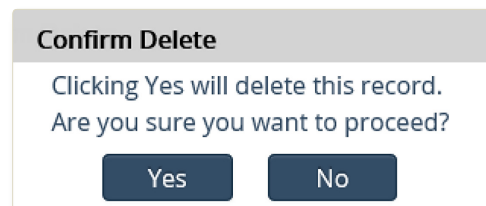
Demographics – Working Status tab

1. Click on the  tab to update or document the selected individual’s working status information:



The screenshot shows the 'Working Status' tab selected. At the top, there are tabs for Income, Insurance, Disability, Education, Working Status, Housing, and Other Characteristics. Below the tabs is a section titled 'Add Working Status'. Under this, there is a table with two columns: 'Working Status' and 'Notes'. The 'Working Status' column contains one entry, 'Employed Full-Time'. Below the table, there is a 'Show 10 entries' dropdown, pagination links (First, Previous, 1, Next, Last), and a 'Delete' button.

- a. View/Edit: To view or edit existing working status information click on the *Working Status* of the desired work status line in the grid.
- b. New: Click  to add a new work status.
- c. Delete: Click on the line in the grid of the item and then click .
A confirmation pop-up will appear: Clicking  will delete the item.
Clicking  will cancel the action and the item will not be deleted.



Confirm Delete

Clicking Yes will delete this record.
Are you sure you want to proceed?



2. Completing the *Demographics – Working Status* pop-up:

The form is titled "Demographics - Working Status". It contains a "Working Status *" dropdown menu with a "-Select-" option, a "Notes" text area, and a magnifying glass icon. Below the form are "Save" and "Cancel" buttons. Red callout bubbles labeled "A" and "B" point to the dropdown menu and the notes area, respectively.

- Working Status*: Select the status from the drop-down.
- Notes*: If applicable, enter notes about the status.
- Click **Save** to add the entry to the grid and close the pop-up.
Clicking **Cancel** will close the pop-up without saving any information that was entered or updated.

Demographics – Housing tab

1. Click on the **Housing** tab to update or document the selected individual's Housing Information:

The interface shows the "Housing" tab selected among others like "Income", "Insurance", "Disability", "Education", "Working Status", and "Other Characteristics". There is an "Add Housing" button. Below it is a table with columns: "Housing Status", "Housing Type", and "Living with Friend/Family less than 90 days". The first row shows "Emergency shelter" and "House". At the bottom, there is a "Show 10 entries" dropdown, pagination buttons ("First", "Previous", "1", "Next", "Last"), and a "Delete" button.

- View/Edit*: To view or edit existing housing information click on the *Housing Status* of the desired housing status line in the grid.
- New*: Click **Add Housing** to add a new housing status.



- c. Delete: Click on the line in the grid of the item and then click **Delete**.
A confirmation pop-up will appear: Clicking **Yes** will delete the item.
Clicking **No** will cancel the action and the item will not be deleted.

2. Completing the *Additional Information – Housing* pop-up:

- a. *Housing Status*: Select the housing status of the individual.
- b. *Housing Type*: Select the type of housing for the individual.
- c. If the individual is staying or living in the residence of a family member or friend the *Living with Friend/Family Less than 90 days* drop-down will become active and mandatory.
- d. *Notes*: If applicable, enter notes regarding the Housing Information.
- e. Click **Save** to add the entry to the grid and close the pop-up.
Clicking **Cancel** will close the pop-up without saving any information that was entered or updated.

TIP: If the Participant has been living with Friend/Family more than 90 days you may want to consider adding the Friend/Family to the Household.



Demographics – Other Characteristics tab

1. Click on the **Other Characteristics** tab to update or document Other Characteristics for the selected individual:

Income Insurance Disability Education Working Status Housing **Other Characteristics**

Other Characteristics

Head Start Parent? * **A** Displaced Homemaker? * **B** Driver License? * **C**

-Select- -Select- -Select-

Save

- a. *Head Start Parent?*: Indicate whether or not the Individual is a Head Start parent by selecting "Yes" or "No" from the drop-down.
- b. *Displaced Homemaker?*: Indicate whether or not the Individual is a displaced homemaker by selecting "Yes" or "No" from the drop-down.
- c. *Driver License?*: Indicate whether or not the Individual has a driver's license by selecting "Yes" or "No" from the drop-down.
- d. Click **Save** to save the information entered.

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 iService, go to: <https://servicedesk.alleghenycounty.us>

This and other Job Aids can be found at: <http://s3.amazonaws.com/dhs-application-support/index.htm>