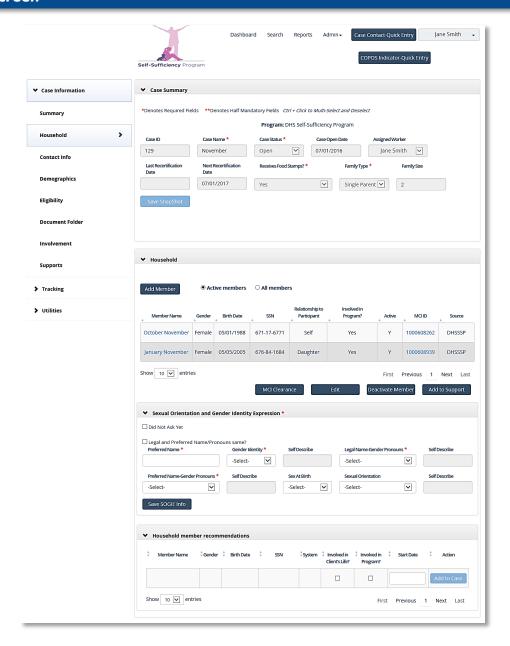# Case – Household – DHSSSP Job Aid

The *Household* screen contains all of the current, former, and potential Household Members for the case.

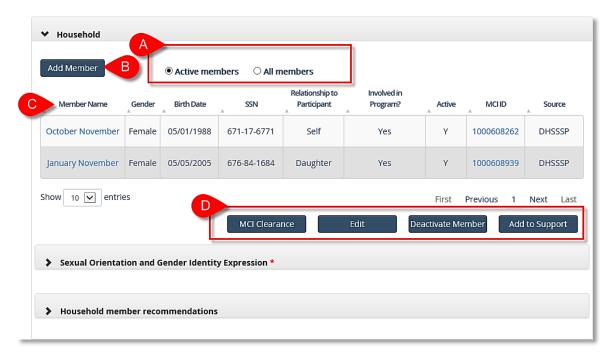## Household screen

Navigation

1. Bring the Case into focus and navigate to ❤ Case Information → Household ❯ .
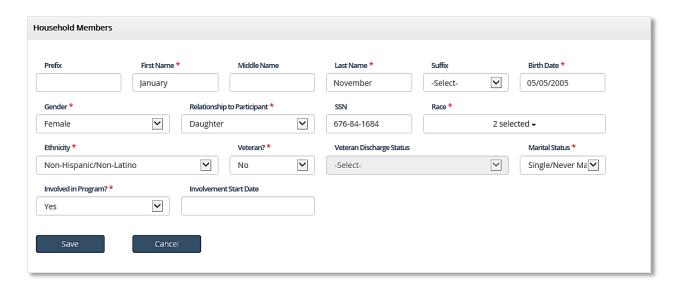
Household

1. The [∨ Household] pane allows users to review, edit, MCI clear, add, or deactivate/activate Household Members as well as change a Household Member to a Support.

a. The list will default to *Active Members*. To view both active and deactivated Household Members select the ⊙ *All Members* radio button.

b. To add a new Household Member click [Add Member].

c. The *Household* grid contains basic information about the Household Members including their *Name, Gender, Birthdate, SSN, Relationship to Participant, Involved in Program?, Active, MCI ID* (if the Household Member has been MCI Cleared), and system *Source*.

d. These buttons can be used to run an MCI Clearance on a Household Member, edit the Household Member's information, deactivate the Household Member, or move a Household Member to Supports.
    i. The only Household Member that cannot be deactivated or moved to Support is the Participant. The Participant's *Relationship to Participant* will always be "Self". Only one Household Member may have the relationship of "Self" at any given time.
    ii. To use the buttons in this section first select the desired Household Member from the grid by clicking on that line in the grid.

2. To view a Household Member's information, click on the Household Member's name in the grid.
    a. To close the *Household Members* pop-up click [Cancel].

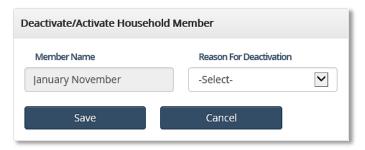## Editing, Deactivating/Activating, or Adding to Support

Household Members

Prefix	First Name *	Middle Name	Last Name *	Suffix	Birth Date *
	January		November	-Select-	05/05/2005

Gender *	Relationship to Participant *	SSN	Race *
Female	Daughter	676-84-1684	2 selected

Ethnicity *	Veteran? *	Veteran Discharge Status	Marital Status *
Non-Hispanic/Non-Latino	No	-Select-	Single/Never Ma

Involved in Program? *	Involvement Start Date
Yes	

Save   Cancel

1. Editing a Household Member:
   a. Select the desired Household Member from the grid and click **Edit**. The *Household Members* pop-up will open.

   b. Update the person's information in the *Household Members* pop-up and click **Save**.

   c. To close the *Household Members* pop-up without saving changes click **Cancel**.

2. Deactivating a Household Member:
   a. Select the Household Member to deactivate and click **Deactivate Member**. Note that the Participant cannot be deactivated.

   b. In the pop-up select the *Reason for Deactivation* and click **Save**.

   c. To close the pop-up without saving changes click **Cancel**.

Deactivate/Activate Household Member

Member Name	Reason For Deactivation
January November	-Select-

Save   Cancel

   d. The message "Household Member deactivated successfully" will appear above the grid.

3. Activating a Household Member:
    a. Select the *All Members* radio button above the grid.

    b. Select the deactivated Household Member to Activate.

    c. In the *Involved in Program?* drop-down select "yes" and click [Save]. This Household Member will now appear in the *Active Members* filtered grid.

4. Adding a Household Member to *Supports*: Use this option if a Household Member is no longer part of the household but is now a Support.
    a. Select the Household Member from the grid and click [Add to Support].

    b. A confirmation pop-up will appear:

Confirm

Do you want to add member as support ?
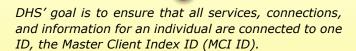
[Yes]   [No]

Click [Yes] to add the Household Member to Supports.
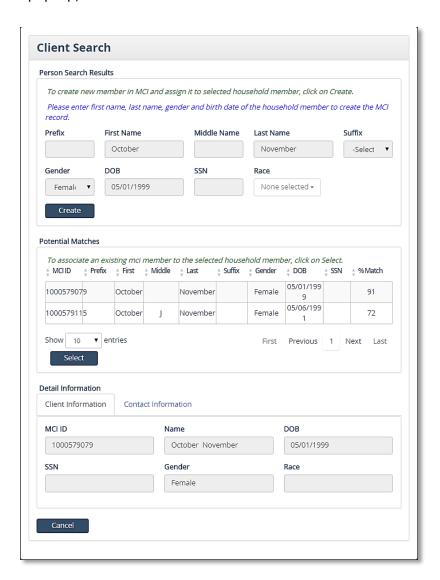The message "Household Member deactivated successfully" will appear above the grid.

Clicking [No] will close the confirmation pop-up without adding the Household Member to Support.

MCI (Master Client Index) Clearing Household Members

> DHS' goal is to ensure that all services, connections, and information for an individual are connected to one ID, the Master Client Index ID (MCI ID).
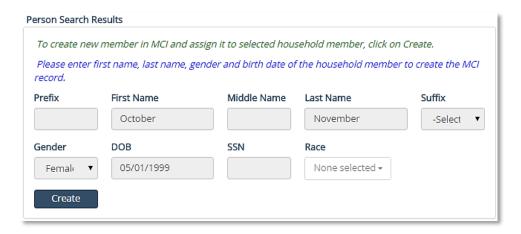>
> The MCI Clearance process assists in this by helping to minimize the possibility of duplicate MCI IDs within DHS applications.

1. Household Members who have an MCI (Master Client Index) ID in the grid have already been cleared. These Household Members can be re-cleared if necessary. To open the MCI Clearance *Client Search* pop-up, select the desired household member and click [MCI Clearance].

Client Search

Person Search Results

To create new member in MCI and assign it to selected household member, click on Create.

Please enter first name, last name, gender and birth date of the household member to create the MCI record.

Prefix	First Name	Middle Name	Last Name	Suffix
	October		November	-Select ▼

Gender	DOB	SSN	Race
Female ▼	05/01/1999		None selected ▾

[Create]

Potential Matches

To associate an existing mci member to the selected household member, click on Select.

MCI ID	Prefix	First	Middle	Last	Suffix	Gender	DOB	SSN	% Match
1000579079		October		November		Female	05/01/1999		91
1000579115		October	J	November		Female	05/06/1991		72

Show [10 ▼] entries   First   Previous   1   Next   Last

[Select]

Detail Information

Client Information | Contact Information

MCI ID	Name	DOB
1000579079	October November	05/01/1999

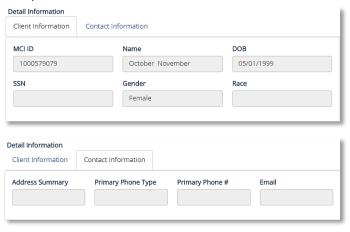| SSN	Gender	Race
	Female	

[Cancel]

2. The *Person Search Results* section contains the information that has been entered in this Case (or received from the Referral) for the Household Member. Compare this information to the information of the individuals in the *Potential Matches* section.

a. The *Potential Matches* section contains a grid of all possible matches. Note the *% Match* column. This percentage refers to how likely it is that your Household Member is this person based on the demographic data entered.

   i. To view more information on the Potential Match, click on the person's name in the grid. The *Detail Information* tabs will update to include that person's information.
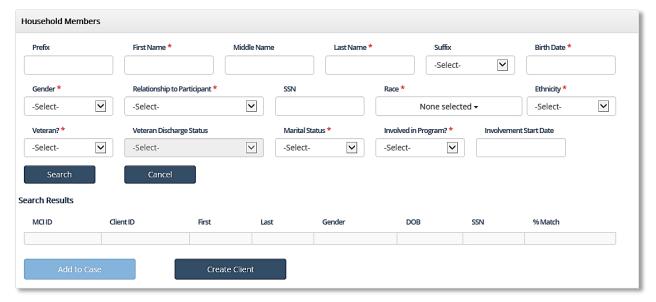
3. After reviewing the *Person Search Results*, determine whether the Household Member is one of the potential matches.
   a. If the Household Member is one of the potential matches select that Potential Match in the grid and click [Select] .

   > **Note:** *If there is an individual with a % Match of 95% or higher in the Person Search Results that individual must be selected in order to MCI Clear the Household Member. Synergy will not allow a new MCI ID to be created.*

   b. If the Household Member is NOT one of the potential matches click [Create] to create a new MCI ID for this Household Member.

   c. To close the MCI *Client Search* pop-up without creating or selecting an MCI ID click [Cancel] .

Adding a new Household Member

1. Click [Add Member] to bring up the *Household Members* pop-up.

Household Members

Prefix	First Name *	Middle Name	Last Name *	Suffix	Birth Date *
				-Select-	

Gender *	Relationship to Participant *	SSN	Race *	Ethnicity *
-Select-	-Select-		None selected ▾	-Select-

Veteran? *	Veteran Discharge Status	Marital Status *	Involved in Program? *	Involvement Start Date
-Select-	-Select-	-Select-	-Select-	

[Search]   [Cancel]

Search Results

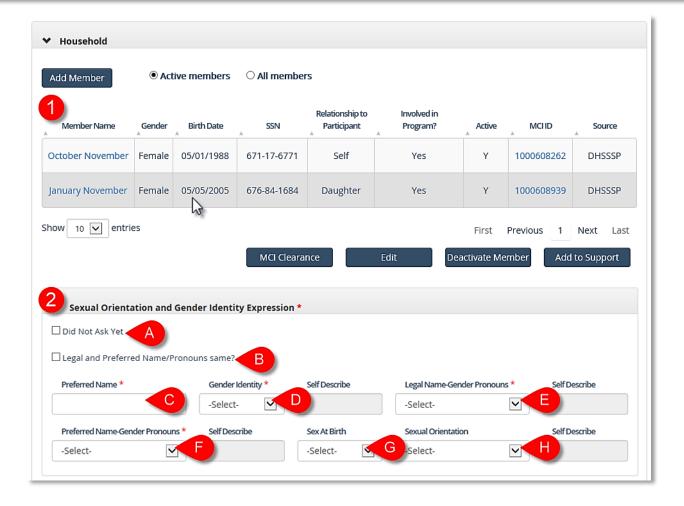| MCI ID	Client ID	First	Last	Gender	DOB	SSN	% Match

[Add to Case]   [Create Client]

2. Enter all known information for the client.
   a. Remember that only one Household Member may have the relationship of "Self(Participant)" at any given time.

   b. *Race* is a multi-select drop-down menu. Select all applicable races using the check boxes within the drop-down.

3. Once all of the fields have been filled out click **Search** to review possible MCI ID matches for the Household Member.

4. Review the *Search Results* to determine whether the Household Member is one of the individuals in the *Search Results* grid.

Search Results

MCI ID	Client ID	First	Last	Gender	DOB	SSN	% Match
1000578721	19881	ADAM	KENNEDY	Male	01/01/1999		91

Show 10 ▼ entries   First   Previous   1   Next   Last

   a. If the person is one of the individuals in the *Search Results*, select that individual by clicking their line in the grid and clicking **Add to Case** .

   b. If the person is NOT one of the individuals in the *Search Results* click **Create Client** .

   c. Note that if no date is entered, the *Involvement Start Date* will default to the date the Household Member was entered on Case in the system.

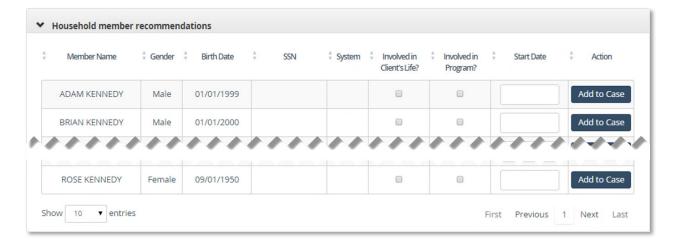## Sexual Orientation and Gender Identity Expression (SOGIE)

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

2. In the [⌄ Sexual Orientation and Gender Identity Expression] pane below complete the Sexual Orientation and Gender Identity Expression (SOGIE) information for the selected individual.

    a. If you have not yet asked about the individual's SOGIE information, check the ☑ *Did Not Ask Yet* box. Doing so will cause the rest of the SOGIE fields to become read only. When you are ready to document this information you can uncheck the ☐ *Did Not Ask Yet* checkbox and all of the SOGIE fields will be enabled again.

    b. If the individual has indicated that their preferred first name and Pronouns are the same as their Legal Name and Pronouns check the ☑ *Legal and Preferred Name/Pronouns same?* Checkbox. Checking this box will update the *Preferred Name* field with the individual's first name as it appears in the *Household Information* grid.

    c. *Preferred Name*: Enter the individual's preferred name here.

d. *Gender Identity*: Select the Gender Identity that the individual identifies as from the drop-down. If their Gender Identity is not one of the options listed, select "Self Describe". This will cause the *Self Describe* field to the right to open; enter the individual's Gender Identity here.

e. *Legal Name-Gender Pronouns*: Select the individual's Legal Gender Pronouns from the drop-down. If their Legal Gender Pronouns are not one of the options listed, select "Self Describe". This will cause the *Self Describe* field to the right to open; enter the individual's Legal Gender Pronouns here.

f. *Preferred Name-Gender Pronouns*: Select the individual's Preferred Gender Pronouns from the drop-down. If their Preferred Gender Pronouns are not one of the options listed, select "Self Describe". This will cause the *Self Describe* field to the right to open; enter the individual's Preferred Gender Pronouns here.

g. *Sex At Birth*: Select the individual's sex at birth from the drop-down.

h. *Sexual Orientation*: Select the individual's Sexual Orientation Sexual Orientation from the drop-down. If their Sexual Orientation is not one of the options listed, select "Self Describe". This will cause the *Self Describe* field to the right to open; enter the individual's Sexual Orientation here.

3. Click [Save] at the bottom of the screen. Repeat steps 1 through 3 for each individual listed in the *Household* grid.

Household Member Recommendations

1. *Household Member Recommendations* are transmitted to DHSSSP when a referral is made in another connected DHS system. These recommendations include individuals who are related in some way to the Participant on the Case.

	Member Name	Gender	Birth Date	SSN	System	Involved in Client's Life?	Involved in Program?	Start Date	Action
	ADAM KENNEDY	Male	01/01/1999			☐	☐		Add to Case
	BRIAN KENNEDY	Male	01/01/2000			☐	☐		Add to Case
	ROSE KENNEDY	Female	09/01/1950			☐	☐		Add to Case

Show 10 ▼ entries
First Previous 1 Next Last

   a. To add a Household Member from the *Household Member Recommendations* list, indicate whether the person is involved in the Client's (Participant's) life and/or involved in the DHSSSP program by checking the relevant boxes in that individual's line in the grid.

   b. Enter the *Start Date* for the Household Member.

   c. Click **Add to Case** to move this recommended Household Member to the *Household* grid.

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