



## Referral – 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

**Demographics**

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

Show  entries

First Previous **1** Next Last

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

Previous Next

### Navigation

1. To access an existing Referral (Pending or Active): On the **Dashboard**, locate the desired Pending or Active Referral in **Pending Referrals** or **Active Referrals** and click on the *Referral ID*. This will open the *Household Information* screen.

Referral Date	Referral ID	First Name	Last Name	Referred By	Category	Source	Worker	Status
7/1/2016	2478	Jack	Jameson	Jane Smith		DHSSSP	Jane Smith	Pending

Show  entries

First Previous **1** Next Last

Link to Referral Screen View

2. To navigate to the Referral *Demographics* screen:
  - a. Click on the **Demographics** tile.



## Demographics – Income tab

**Demographics**

**Household Info**

Member Name	Gender	Birth Date	SSN	Relationship to Participant	MCI ID
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

**Income Information**

Income Source	Income Amount Over a 30 day period	Location	Start Date	End Date
Earned Income(i.e. employment income)	300.00		1/1/2018	

Show 10 entries First Previous 1 Next Last

**Total Household Income \$** 300.00 **Monthly**

**Income Source \*** -Select- **Non-Cash Benefit Type** -Select- **Other Income Source**

**Location**

**Start Date** **End Date**

**New** **Save**

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, document the individual's income information:
  - a. *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.
  - b. *Income Amount*: Enter the Income amount for this income source within the latest 30 day period.
  - c. *Location*: If applicable, enter the location from which the income is received.
  - d. *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.



- Click **Save** to add the Income Source to the *Income Information* grid.
- Click **New** to add additional Income Sources to the *Income Information* grid.
- To delete the entry, click the Delete Icon [ ] to the right of the entry in the grid. A *Confirm Delete* pop-up will appear:

**Confirm Delete**

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

**Yes** **No**

Clicking **Yes** will delete the entry.

Clicking **No** will cancel the action and the entry will not be deleted.

- The *Total Household Income (Monthly)* 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

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

The screenshot shows the 'Insurance' tab selected. The 'Insurance Information' section contains a table with two columns: 'Insurance Type' and 'Notes'. The first row shows 'CHIP' in the 'Insurance Type' column. Below the table, there are two input fields: 'Insurance Type\*' (marked with a red arrow A) and 'Notes' (marked with a red arrow B). There are also buttons for 'New' and 'Save'.

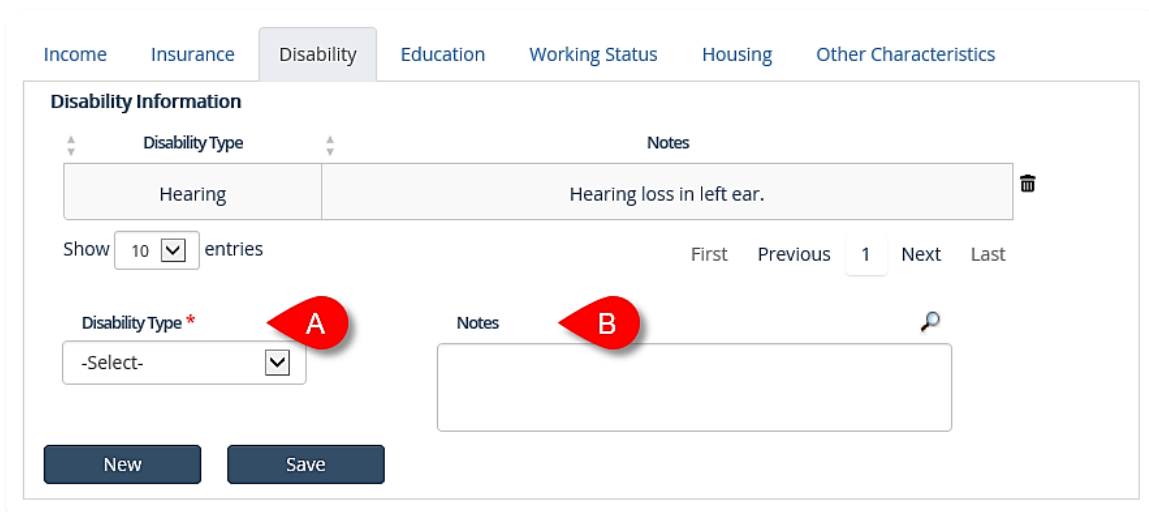
- Insurance Type*: Select the type of insurance the individual has.
- Notes*: If applicable, enter notes about the individual's insurance. The *Notes* narrative will become mandatory if the *Insurance Type* selected is "Other".








- c. Click  to add the Insurance Information to the *Insurance Information* grid.
- d. Click  to add additional Insurance Information to the *Insurance Information* grid.
- e. To delete an entry, click the Delete Icon [  ] to the right of the entry in the grid. A *Confirm Delete* pop-up will appear:  
Clicking  will delete the entry.  
Clicking  will cancel the action and the entry will not be deleted.

## Demographics – Disability tab

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



- a. *Disability Type*: If applicable, select the type of disability the individual has.
- b. *Notes*: If applicable, enter notes about the individual's disability. The *Notes* narrative will become mandatory if the *Disability Type* selected is "Other".
- c. Click  to add the Disability Type to the *Disability Information* grid.
- d. Click  to add additional Disability Types to the *Disability Information* grid.
- e. To delete an entry, click the Delete Icon [  ] to the right of the entry in the grid. A *Confirm Delete* pop-up will appear:  
Clicking  will delete the entry.  
Clicking  will cancel the action and the entry will not be deleted.



## Demographics – Education tab

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

The screenshot shows the 'Education' tab selected. The 'Education Information' section contains a table with the following data:

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

Below the table, there are three dropdown menus with red callout letters:

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

At the bottom of the form are two buttons: **New** and **Save**.

- Highest Education Level Achieved*: Select the highest level of education the individual has completed.
- Student?*: Answer whether or not the individual is a student using the drop-down.
- Do you have a delinquent education loan(s)?*: Answer whether or not the individual has any delinquent education loans using the drop-down.
- Click **Save** to add the Education Information to the *Education Information* grid.
- Click **New** to add additional Education Information to the *Education Information* grid.
- To delete an entry, click the Delete Icon [ ] to the right of the entry in the grid. A *Confirm Delete* pop-up will appear:  
Clicking **Yes** will delete the entry.  
Clicking **No** will cancel the action and the entry will not be deleted.



## Referral: Demographics – Working Status tab

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

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

**Working Status Information**

Working Status	Notes
Employed Full-Time	

Show 10 entries First Previous 1 Next Last

Working Status \* **A** Notes **B**

-Select- [v]

New Save

- a. *Working Status*: Select the status from the drop-down.
- b. *Notes*: If applicable, enter notes about the status.
- c. Click **Save** to save the status to the grid.
- d. Click **New** to add an additional status to the grid.
- e. To delete an entry, click the Delete Icon [ ] to the right of the entry in the grid.  
A *Confirm Delete* pop-up will appear:

**Confirm Delete**

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

Yes No

Clicking **Yes** will entry the status.

Clicking **No** will cancel the action and the entry will not be deleted.



## Demographics – Housing tab

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

The screenshot shows the 'Housing' tab selected in a navigation bar. Below the navigation bar is the 'Housing Information' section. It contains three columns: 'Housing Status', 'Housing Type', and 'Living with Friend/Family less than 90 days'. The first column has a text input field with the value 'Staying or living in a family member's room, apartment or house'. The second column has a text input field with the value 'Apartment'. The third column has a text input field with the value 'Yes'. Below these fields are three dropdown menus: 'Housing Status \*', 'Housing Type \*', and 'Living with Friend/Family less than 90 days'. Each dropdown menu has a red callout bubble labeled A, B, and C respectively. Below the dropdown menus is a 'Notes' field with a red callout bubble labeled D. At the bottom of the form are two buttons: 'New' and 'Save'. To the right of the 'Living with Friend/Family less than 90 days' field is a trash icon.

- Housing Status*: Select the housing status of the individual. 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.
- Housing Type*: Select the type of housing for the individual.
- Notes*: If applicable, enter notes regarding the Housing Information.
- Click **Save** to add the Housing Information to the *Housing Information* grid.
- Click **New** to add additional Housing Information to the *Housing Information* grid.
- To delete an entry, click the Delete Icon [ ] to the right of the entry in the grid. A *Confirm Delete* pop-up will appear:  
Clicking **Yes** will delete the entry.  
Clicking **No** will cancel the action and the entry will not be deleted.

**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's 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.



## Navigation and Status

### 1. Navigation Buttons:

- Use the  button at the bottom of the screen to move on to the **Eligibility** screen. The  tile can also be clicked to navigate to the **Eligibility** screen.
- Clicking  will navigate the user back to the **Contact Info** screen.
- The  button will remain light blue and inactive until all of the required information has been completed in the Referral and the Participant has been found to be Eligible.
- CAUTION:** The  button at the top of the screen will navigate the user back to the Dashboard and any unsaved information will be lost. If this button is clicked before a new Referral has been saved for the first time, the user will have to start over again on that Referral.

- Once information has been entered and saved the ; which indicates that the screen is Mandatory but has not been completed, to the left of the  tile will change to a ; which indicates that the screen is either Complete or has information entered.

### 3. The **Eligibility** screen will not become active until the following items are completed:

- The *Household Information* screen must be completed and all Household Members must be MCI cleared.
- The *Referral Status* on the *Household Information* screen must be "In Progress".
- The *Document Status* on the *Household Information* screen must be "Complete".  
Note that Eligibility verification documents are to be uploaded to the *Document Folder* screen.
- The *Referral Information* screen must be completed.
- At least one *Case Contact* must be documented.
- Contact Information* for the Participant including address and phone number must be documented.
- Demographics* for the Participant including income must be documented.

## 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 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>