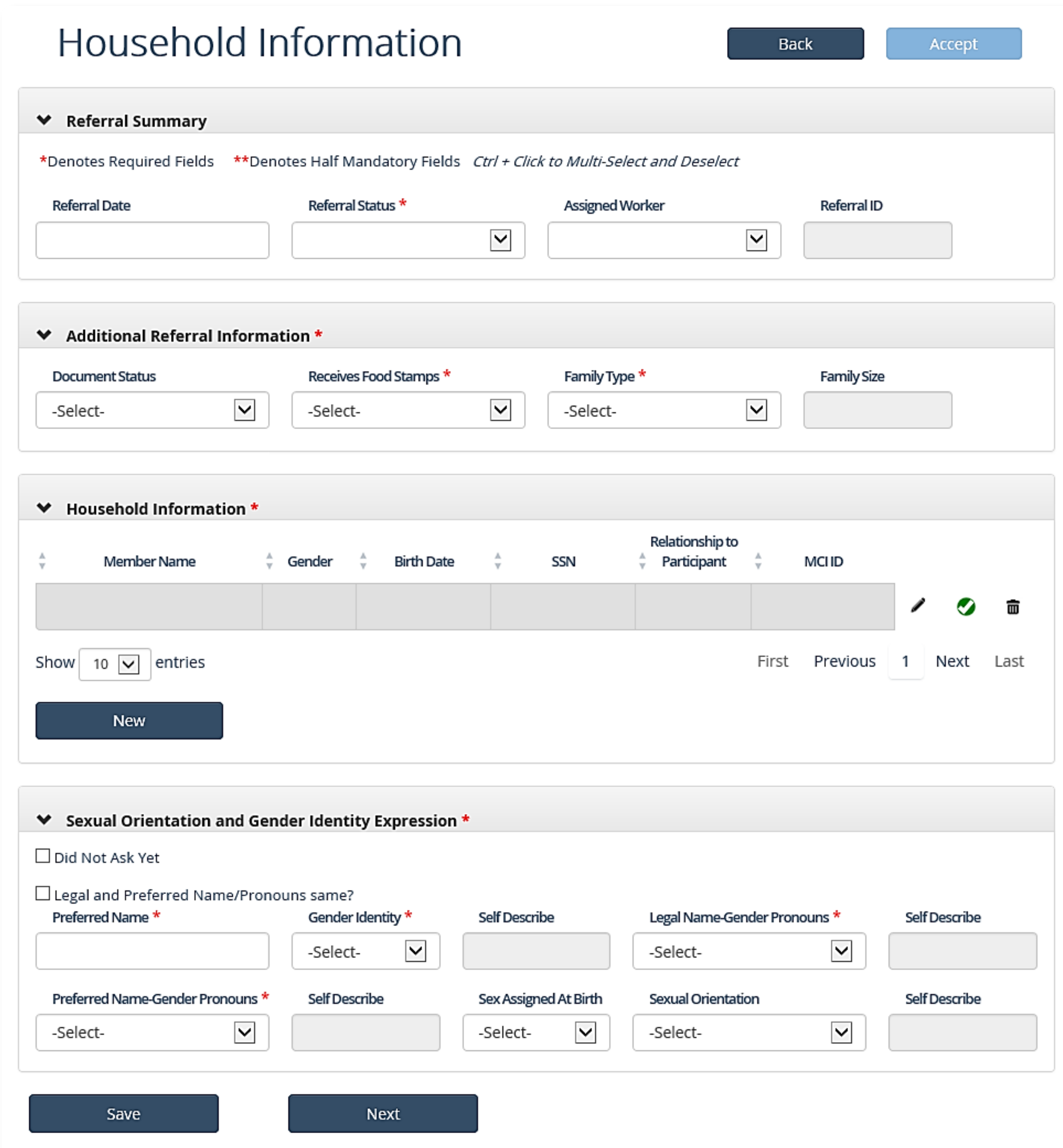
Referral – Household Information – DHSSSP Job Aid

Referrals can be received from other systems or created within the DHSSSP system. The *Household Information* screen is the first screen that must be completed on a new referral, regardless of origin.

Household Information



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

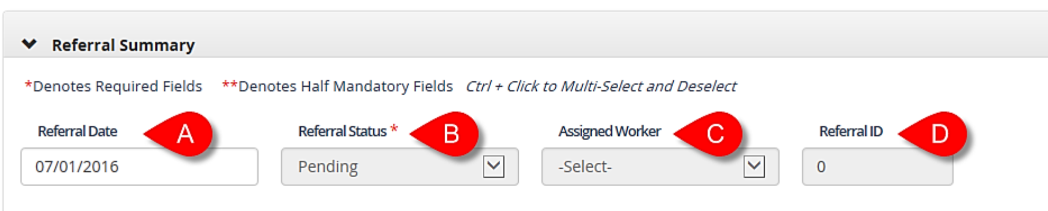
Link to Referral Screen View

Show 10 entries   First Previous 1 Next Last

2. To create a new Referral: On the Dashboard, click New Referral located within Pending Referrals. This will open a blank *Household Information* screen.

Referral Summary and Additional Referral Information

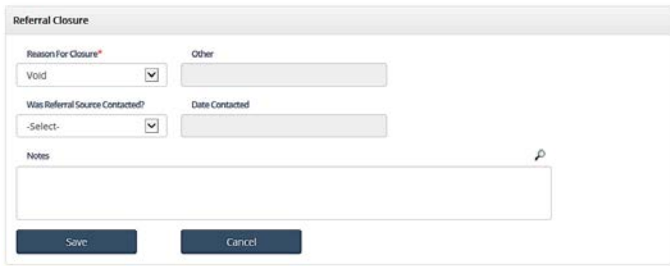
1. Referral Summary: This pane will be displayed at the top of every Referral screen and contains the following information:



   a. *Referral Date*: Enter the date the Referral started.

   b. *Referral Status*: The statuses are: Pending, Assigned, In Progress or Void. The *Referral Status* defaults to "Pending" on all new referrals. Once the *Household Information* screen has been saved this will change automatically to "Assigned". The user can change the status to "In Progress" or Void".

i. If “Void” is selected, the *Referral Closure* pop-up will appear and must be completed and saved in order to completely Void and close out the referral.



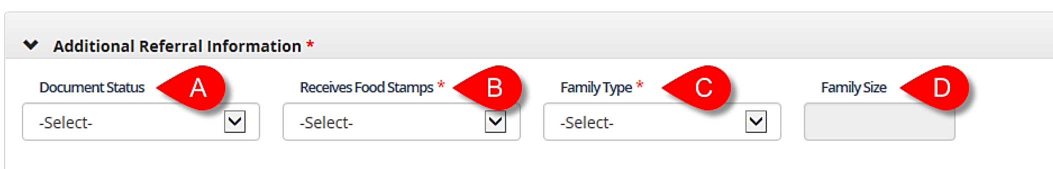
Select “Void” in the *Reason for Closure* drop-down. Answer the *Was Referral Source Contacted?* Drop-down. If the answer is “Yes” enter the *Date Contacted*. Enter the reason for voiding the Referral in the *Notes* section and click **Save** to close the *Referral Closure* pop-up and the referral.

Clicking **Cancel** will close the *Referral Closure* pop-up without saving any information or closing the Referral.

c. *Assigned Worker*: When creating a new Referral the *Assigned Worker* will default to the user who created the new Referral but can be changed by a Supervisor or Administrator.

d. *Referral ID*: Once the Referral Information screen has been saved for the first time a *Referral ID* will be generated. The *Referral ID* cannot be changed.

2. **Additional Referral Information**:



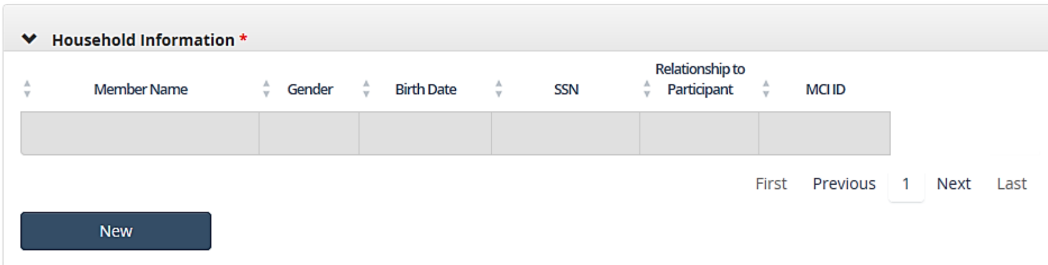
a. *Document Status*: If all required documents have been received, select “Complete” from the drop-down. Otherwise select “In Progress”.

> ***Note:*** *In order to Accept a Referral the Document Status must be “Complete”. Documents should be scanned and uploaded to the* ***Referral – Document Folder*** *screen.*

b. *Receives Food Stamps*: To answer, select Yes or No from the drop-down.
c. *Family Type*: Select the Family Type from the drop-down.
d. *Family Size*: The size of the family is automatically calculated based on the number of individuals documented in the **Household Information** pane. This field cannot be edited.

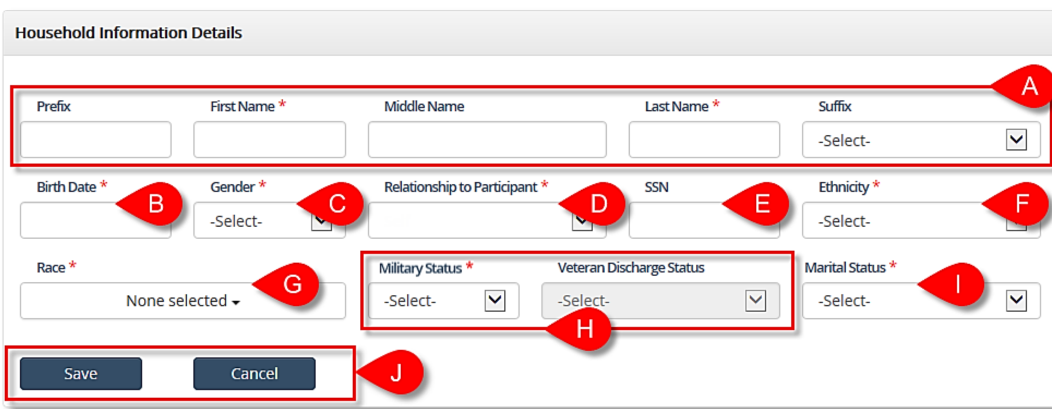
Household Information

1. Household Information: If the Referral was created in another system there may already be household members entered in this pane.



   a. Click New to enter a new household member. This will open the Household Information Details pop-up.

2. *Household Information Details* pop-up: Complete all of the known information for the individual in the *Household Information Details* pop-up.

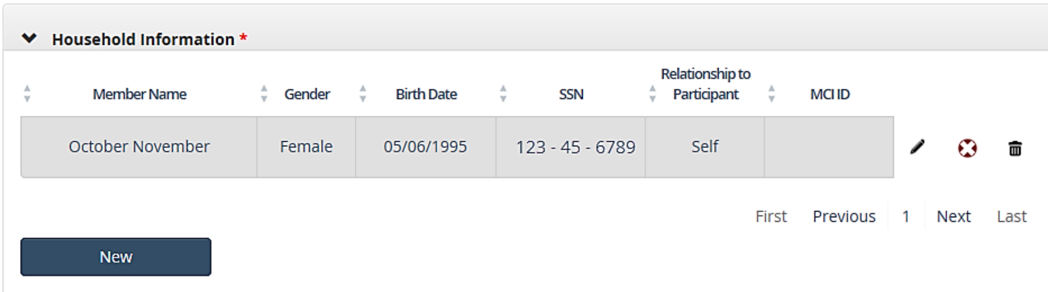


The following information can be documented in the *Household Information Details* pop-up:

a. Name: *Prefix, First Name, Middle Name, Last Name,* and *Suffix*.
b. *Birth Date*: Enter the Participant's date of birth.
c. *Gender*: Select the Participant's gender from the drop-down.
d. *Relationship*: Select the Relationship to the primary Participant. If the individual is the primary Participant select "Self"
e. *SSN*: Enter the Participant's Social Security Number, if known.
f. *Race*: This drop-down is a multi-select drop-down. Choose all that apply.
g. *Ethnicity*: Select the Participant's ethnicity from the drop-down.
h. *Military Status*: Select the Participant's status from the drop-down. If "Veteran" is selected then the *Veteran Discharge Status* must also be selected.
i. *Marital Status*: Select the individual's marital status from the drop down

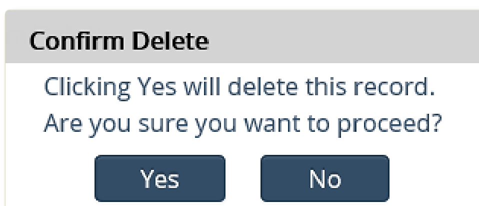
j. Click Save to preserve the information entered. Clicking Cancel will close the *Household Information Details* pop-up without saving any information entered.

3. Once the *Household Information* pop-up has been completed the individual will appear in the *Household Information* grid.



To edit the individual, click the Edit Icon [ ] to the right of the individual in the *Household Information* grid. This will open the *Household Information Details* pop-up for editing.

To delete the individual, click the Delete Icon [ ] to the right of the individual in the *Household Information* grid. A *Delete Confirmation* pop-up will appear: Clicking Yes will delete the individual. Clicking No will cancel the action and the individual will not be deleted.

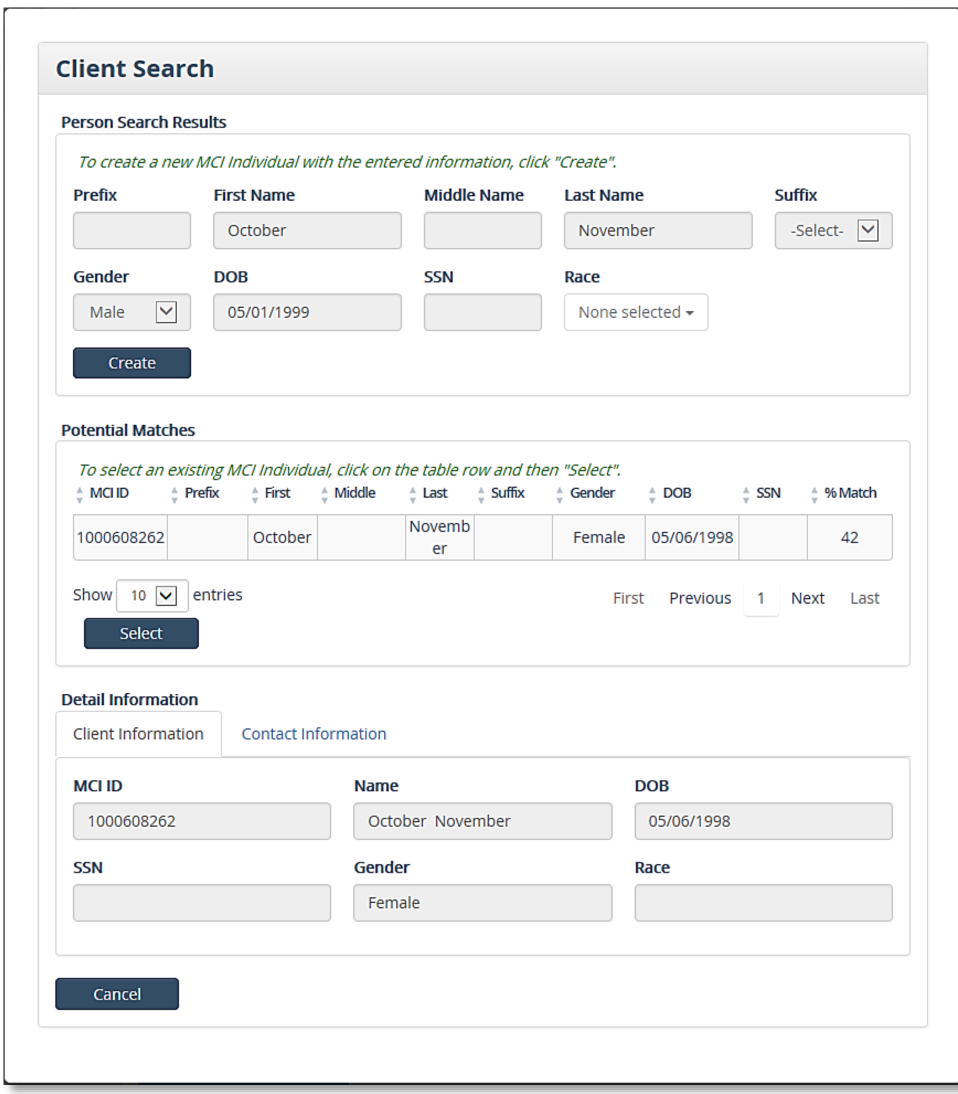


Household Members must be MCI Cleared. If an individual has already been MCI Cleared there will be a to the right of the individual in the *Household Information* grid. If the individual has not been MCI Cleared there will be an .

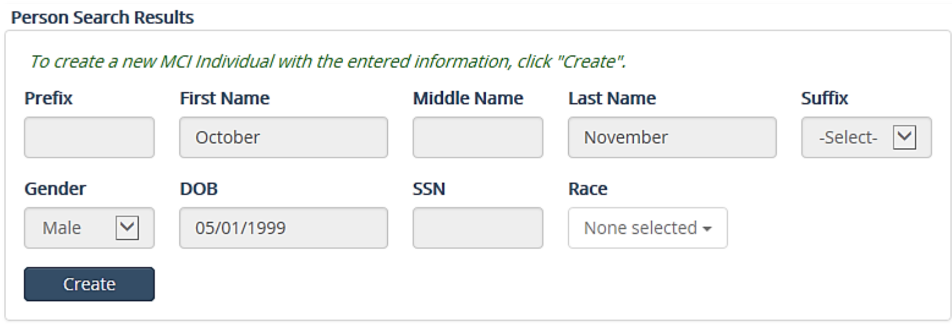
MCI (Master Client Index) Clearing the Participant or Household Member

DHS' goal is to ensure that all services, connections, and information for an individual is 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.

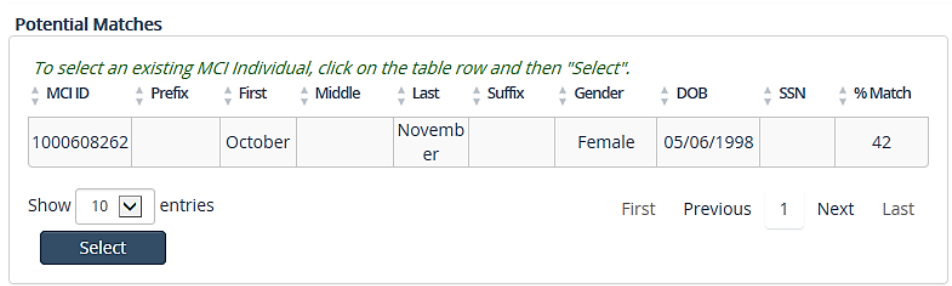
1. Clearing or Re-Clearing an MCI ID: Click the or (if re-clearing the individual) to the right of the individual in the *Household Information* grid. The *Client Search* pop-up will appear:



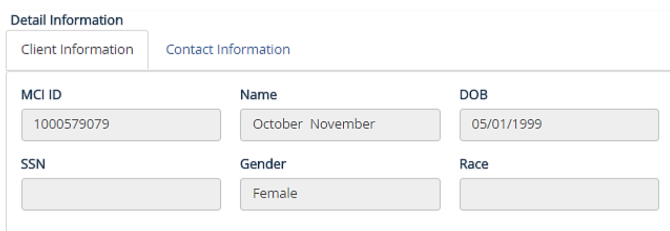
a. The *Person Search Results* section contains the information that has been entered in this Referral (or received from another system) for this individual. Compare this information to the information of the individuals in the *Potential Matches* section.

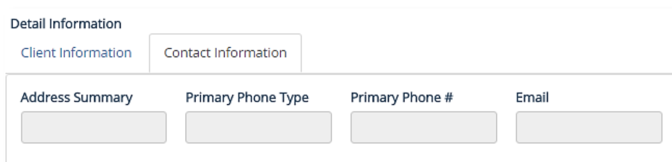


b. The *Potential Matches* section contains a grid of all possible matches. Note the *% Match* column. This percentage refers to how likely it is that your person is this person based on the demographic data entered.



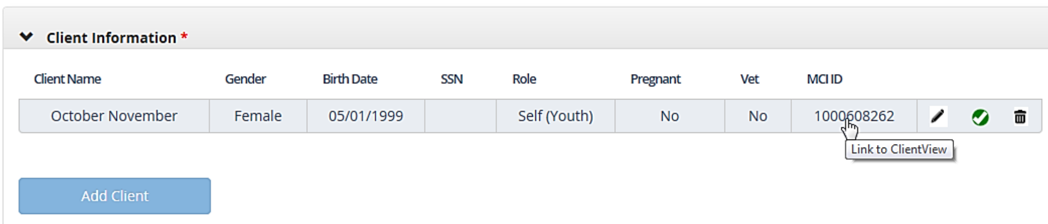
i. To view more information on the Potential Match, click on the person's name in the grid. The *Detail Information* tabs will update to include that person's information.





3. After reviewing the *Person Search Results*, determine whether the individual being cleared is one of the potential matches.
   a. If the individual is one of the potential matches, select that Potential Match in the grid and click **Select**.
   b. If the individual is NOT one of the potential matches click **Create** to create a new MCI ID for this individual.
   c. To close the MCI *Client Search* pop-up without creating or selecting an MCI ID click **Cancel**.

4. Accessing ClientView information connected to the MCI ID: Clicking on the *MCI ID* in the *Client Information* grid will open ClientView and display the individual's information in ClientView.



Tip: *Only users who already have access to the ClientView application will be able to view information within ClientView.*

5. Before the **Sexual Orientation and Gender Identity Expression** pane can be edited the *Household Information* screen must be saved first. Click **Save** at the bottom of the screen. Once **Save** has been clicked for the first time the **Sexual Orientation and Gender Identity Expression** pane will become editable. This must be completed for each individual in the household.

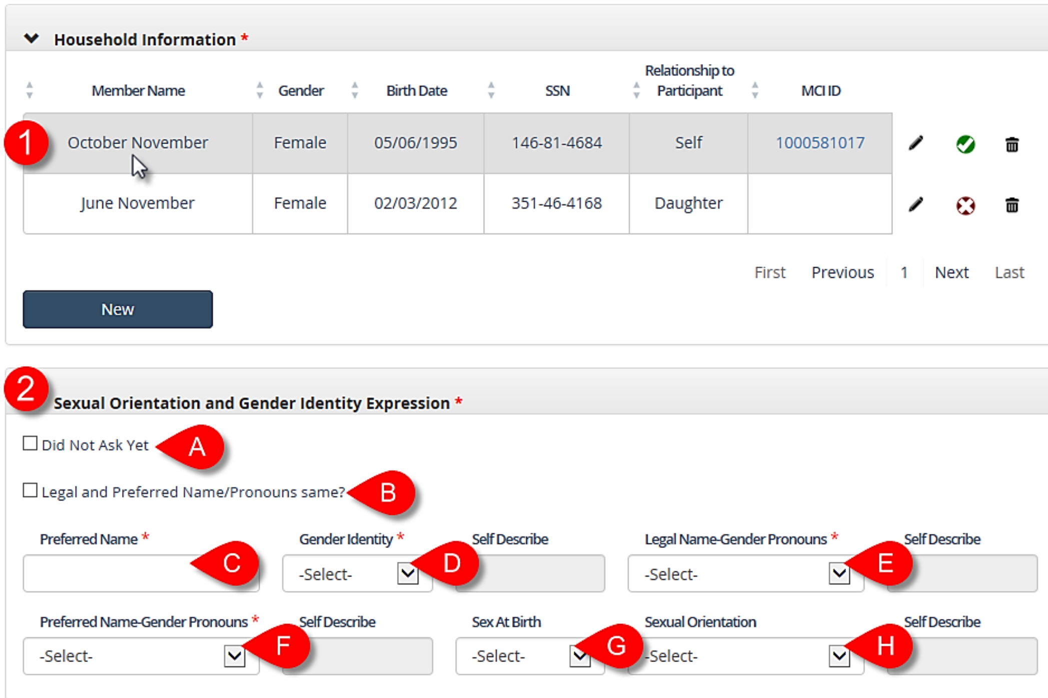
Note: *Once the Household Information screen has been saved for the first time the Referral Status and Assigned Worker information in the Referral Summary pane will be automatically updated.*

The Referral Status will change to "Assigned" and the Assigned Worker will default to the user who clicked the Save button.

The Referral Status must be updated to "In Progress" before a Referral can be accepted and turned into a Case.

The Assigned Worker can be updated by a Supervisor or Manager.

Sexual Orientation and Gender Identity Expression (SOGIE)



1. Select an individual from the *Household Information* 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 **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 Information* grid.

Navigation and Status

1. Navigation Buttons:

   a. Use the **Next** button at the bottom of the screen to move on to the **Referral Info** screen. The **Referral Info** tile can also be clicked to navigate to the *Referral Information* screen.

   b. The **Accept** 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.

   c. CAUTION: The **Back** 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.

2. Once the *Household Information* screen has been completed and saved the ; which indicates that the screen is Mandatory but has not been completed, to the left of the **Household Info** tile will change to a ; which indicates that the screen is either Complete or has 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