



# 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

### Household Information

BackAccept

▼ Referral Summary

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

Referral Date

Referral Status \*

Assigned Worker

Referral ID

▼ Additional Referral Information \*

Document Status

Receives Food Stamps \*

Family Type \*

Family Size

▼ Household Information \*

Member Name	Gender	Birth Date	SSN	Relationship to Participant	MCI ID

Show 10 entries First Previous 1 Next Last

New

▼ Sexual Orientation and Gender Identity Expression \*

☐ Did Not Ask Yet

☐ Legal and Preferred Name/Pronouns same?

Preferred Name \*

Gender Identity \*

Self Describe

Legal Name-Gender Pronouns \*

Self Describe

Preferred Name-Gender Pronouns \*

Self Describe

Sex Assigned At Birth

Sexual Orientation

Self Describe

Save

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 10 entries First Previous 1 Next Last

Link to Referral Screen View

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:

**▼ Referral Summary**

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

Referral Date <b>A</b>	Referral Status * <b>B</b>	Assigned Worker <b>C</b>	Referral ID <b>D</b>
07/01/2016	Pending	-Select-	0

- 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.

The 'Referral Closure' pop-up form contains the following fields: 'Reason For Closure\*' with a dropdown menu showing 'Void' selected; 'Other' with a text input field; 'Was Referral Source Contacted?' with a dropdown menu showing '-Select-' selected; 'Date Contacted' with a date input field; and 'Notes' with a large text area. At the bottom are 'Save' and 'Cancel' buttons.

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** :

The 'Additional Referral Information' form section includes four fields: 'Document Status' (dropdown with '-Select-' selected, marked with a red circle A), 'Receives Food Stamps\*' (dropdown with '-Select-' selected, marked with a red circle B), 'Family Type\*' (dropdown with '-Select-' selected, marked with a red circle C), and 'Family Size' (text input field, marked with a red circle D).

- 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.

▼ Household Information \*

Member Name	Gender	Birth Date	SSN	Relationship to Participant	MCID

First Previous 1 Next Last

New

- 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.

Household Information Details

Prefix First Name \* Middle Name Last Name \* Suffix -Select- ▼

Birth Date \* Gender \* Relationship to Participant \* SSN Ethnicity \* -Select- ▼

Race \* None selected Military Status \* Veteran Discharge Status -Select- ▼ Marital Status \* -Select- ▼

Save Cancel

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.

Member Name	Gender	Birth Date	SSN	Relationship to Participant	MCIID
October November	Female	05/06/1995	123 - 45 - 6789	Self	

First Previous 1 Next Last

New

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.

**Confirm Delete**

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

Yes No

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:

### Client Search

**Person Search Results**

To create a new MCI Individual with the entered information, click "Create".

Prefix	First Name	Middle Name	Last Name	Suffix
<input type="text"/>	<input type="text" value="October"/>	<input type="text"/>	<input type="text" value="November"/>	<input type="text" value="-Select-"/>
Gender	DOB	SSN	Race	
<input type="text" value="Male"/>	<input type="text" value="05/01/1999"/>	<input type="text"/>	<input type="text" value="None selected"/>	

**Potential Matches**

To select an existing MCI Individual, click on the table row and then "Select".

MCI ID	Prefix	First	Middle	Last	Suffix	Gender	DOB	SSN	% Match
1000608262		October		Novemb er		Female	05/06/1998		42

Show  entries

First Previous  Next Last

**Detail Information**

Client Information [Contact Information](#)

MCI ID	Name	DOB
<input type="text" value="1000608262"/>	<input type="text" value="October November"/>	<input type="text" value="05/06/1998"/>
SSN	Gender	Race
<input type="text"/>	<input type="text" value="Female"/>	<input type="text"/>



- 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.

**Person Search Results**

*To create a new MCI Individual with the entered information, click "Create".*

Prefix	First Name	Middle Name	Last Name	Suffix
<input type="text"/>	<input type="text" value="October"/>	<input type="text"/>	<input type="text" value="November"/>	<input type="text" value="-Select-"/>
Gender	DOB	SSN	Race	
<input type="text" value="Male"/>	<input type="text" value="05/01/1999"/>	<input type="text"/>	<input type="text" value="None selected"/>	

- 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.

**Potential Matches**

*To select an existing MCI Individual, click on the table row and then "Select".*

MCI ID	Prefix	First	Middle	Last	Suffix	Gender	DOB	SSN	% Match
1000608262		October		Novemb er		Female	05/06/1998		42

Show  entries

First Previous  Next Last

- 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.

**Detail Information**

Client Information **Contact Information**

MCI ID	Name	DOB
<input type="text" value="1000579079"/>	<input type="text" value="October November"/>	<input type="text" value="05/01/1999"/>
SSN	Gender	Race
<input type="text"/>	<input type="text" value="Female"/>	<input type="text"/>

**Detail Information**

Client Information **Contact Information**

Address Summary	Primary Phone Type	Primary Phone #	Email
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>



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.

Client Name	Gender	Birth Date	SSN	Role	Pregnant	Vet	MCI ID
October November	Female	05/01/1999		Self (Youth)	No	No	1000608262

Link to ClientView

Add Client

**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)

**Household Information \***

Member Name	Gender	Birth Date	SSN	Relationship to Participant	MCID
October November	Female	05/06/1995	146-81-4684	Self	1000581017
June November	Female	02/03/2012	351-46-4168	Daughter	

First Previous 1 Next Last

New

**2 Sexual Orientation and Gender Identity Expression \***

☐ Did Not Ask Yet **A**


☐ Legal and Preferred Name/Pronouns same? **B**

Preferred Name \* **C** Gender Identity \* **D** Self Describe Legal Name-Gender Pronouns \* **E** Self Describe

Preferred Name-Gender Pronouns \* **F** Sex At Birth **G** Sexual Orientation **H** Self Describe


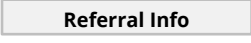
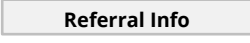


1. Select an individual from the *Household Information* grid by clicking on that individual's name. That individual's line in the grid will turn grey to show that it has been selected.
2. In the **Sexual Orientation and Gender Identity Expression** pane below complete the Sexual Orientation and Gender 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  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  button at the bottom of the screen to move on to the  screen. The  tile can also be clicked to navigate to the *Referral Information* screen.
- b. 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.
- c. **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.

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  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](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>