



# Consumer Information – Dragonfly Job Aid

The *Consumer Information* screen is the first screen that appears when navigating to a specific Referral. This screen contains basic demographic information on the Consumer.

## Consumer Information

**Referral Summary**

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

Referral Date	Referral ID	Assigned Worker	Referral Status
09/01/2017	56495	Samantha Murphy	Open

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**Consumer Information \***

Member Name	Gender	Birth Date	SSN	MCI ID	
Susie Sunshine	Female	01/02/2001		1000863123	

New

Save      Next      Copy & Send Referral

## Navigation

- To access an existing Referral (Pending or Active): On the **Dashboard**, locate the desired Pending or Active Referral in **Pending Referrals** or **Active Referrals** panes and click on the *Referral ID*. This will open the **Consumer Information** screen.
- To create a new Referral: On the **Dashboard**, click **Create New Referral** located within the **Actions** pane. This will open a blank **Consumer Information** screen.
- The **Previous** and **Next** buttons can be used to navigate up or down one screen within the Left Navigation tiles.
- Mandatory screens will have an next to the Left Navigation tile for that screen. Once a screen has been completed this icon will change to a which indicates that the screen is either complete or has information entered.

## Referral Summary

1. ▼ Referral Summary pane: 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 <span style="color: red; font-weight: bold; font-size: 2em;">A</span> <input type="text" value="07/01/2016"/>	Referral Status * <span style="color: red; font-weight: bold; font-size: 2em;">B</span> <input type="text" value="Pending"/>	Assigned Worker <span style="color: red; font-weight: bold; font-size: 2em;">C</span> <input type="text" value="-Select-"/>	Referral ID <span style="color: red; font-weight: bold; font-size: 2em;">D</span> <input type="text" value="0"/>
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- a. *Referral Date*: Enter the date the Referral started.
- b. *Referral Status*: The statuses are: "Pending", "Open", or "Closed". The *Referral Status* defaults to "Pending" on all new referrals. Once the **Consumer Information** screen has been saved the status will change automatically to "Open".
  - i. To close a Referral, select "Closed" from the *Referral Status* drop-down and click Save at the bottom of the screen. The *Confirm Close* pop-up will open.

**Confirm Close**

Are you sure you want to close this Referral? A new Referral will have to be created if additional contacts are required.

Closed Date \*

Yes
No

Enter the *Closed Date* and click Yes to close the Referral. Clicking No will close the pop-up without 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 this can be updated.
  - i. Click the History Icon [ ] next to the *Assigned Worker* drop-down to open a pop-up containing the history of all assignments to the Referral including the *Start Date* and *End Date* of each assignment episode and the *Role* of the worker.

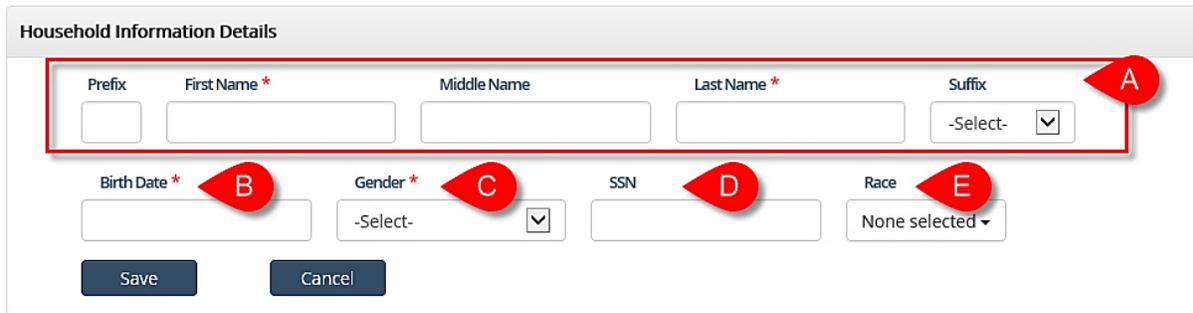
Role	Worker Name	Start Date	End Date
Admin	Samantha Murphy	03/14/2017	

Close

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

## Consumer Information

### 1. Completing the *Household Information Details* pop-up:



- Prefix, First Name, Middle Name, Last Name* and *Suffix*: Enter the Consumer's *First Name* and *Last Name*. If applicable also enter the Consumer's *Prefix, Middle Name, and Suffix*.
- Birth Date*: Enter the Consumer's date of birth.
- Gender*: Select the Consumer's gender from the drop-down.
- SSN*: Enter the Consumer's Social Security Number (SSN).
- Race*: This is a multi-select drop-down, select all that apply.
- Click **Save** to save the information that was entered and close the pop-up. Clicking **Cancel** will close the pop-up without saving any of the information entered.

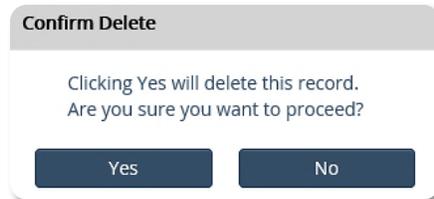
### 2. **Consumer Information**: This pane contains basic demographic information for the Consumer.



Member Name	Gender	Birth Date	SSN	MCIID
Susie Sunshine	Female	01/02/2001		1000863123

- Editing a Consumer's information: If the Consumer has already been entered, click the Edit Icon [  ] to the right of the Consumer in the *Consumer Information* grid. This will open the *Household Information Details* pop-up.
- The icon to the right of the MCI number in the *Consumer Information* grid indicates whether or an MCI clearance has been performed.
  -  indicates that an MCI clearance has not been performed.
  -  indicates that an MCI clearance has been performed.
  - To clear or re-clear an MCI click on  or  to the right of the grid.
  - Clicking on the MCI ID for an individual will open the **Client View** application and display the individual's information within **Client View**.

- c. If this is a new Referral and a Consumer has not yet been entered, click **New** to open the *Household Information Details* pop-up and enter the Consumer's information. There can only be one Consumer per Referral. After one Consumer is entered in the grid the **New** button will be disabled.
- d. Deleting a Consumer: A Consumer can be deleted from a Referral by clicking the trash icon [  ] to the right of the *Consumer Details* grid. A *Confirm Delete* pop-up will appear:



Clicking **Yes** will delete the Consumer.

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

3. Click **Save** at the bottom of the screen before navigating away from the **Consumer Info** screen otherwise any information that has been entered or updated will not be saved. The screen cannot be saved unless all of the mandatory [ \* ] information has been entered.
4. The **Next** button at the bottom of the screen can be used to navigate to the next screen within the Left Navigation tiles.

**NOTE:** *If the Client has not been MCI Cleared the user will not be able to access any screens beyond the Referral Information screen or use the Copy & Send Referral function.*



## MCI (Master Client Index) Clearing

*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.*

- Individuals who have an MCI (Master Client Index) ID in the grid have already been cleared. Individuals can be re-cleared if new information is entered. To open the MCI Clearance pop-up (*Client Search*), select the desired individual and click on the MCI Clearance Icon [  or  ].

### 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
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	-Select- <input type="button" value="v"/>
Gender	DOB	SSN	Race	
<input type="button" value="v"/>	<input type="text"/>	<input type="text"/>	None selected <input type="button" value="v"/>	

**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
<input type="text"/>									

Show  entries First Previous  Next Last

**Detail Information**

Client Information    Contact Information    DHS Involvement

MCI ID	Name	DOB
<input type="text"/>	<input type="text"/>	<input type="text"/>
SSN	Gender	Race
<input type="text"/>	<input type="text"/>	<input type="text"/>



- The *Person Search Results* section contains the information that has been entered in this Case for this individual. Compare this information to the *Potential Matches* section.

**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.*

<b>Prefix</b>	<b>First Name</b>	<b>Middle Name</b>	<b>Last Name</b>	<b>Suffix</b>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	-Select- <input type="button" value="v"/>
<b>Gender</b>	<b>DOB</b>	<b>SSN</b>	<b>Race</b>	
<input type="button" value="v"/>	<input type="text"/>	<input type="text"/>	None selected <input type="button" value="v"/>	

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

**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
1000608262		October		November		Female	05/06/1998		91

Show  entries First Previous  Next Last

- To view more information on the Potential Match, click on the person's name in the grid. The *Detail Information* tabs (*Client Information*, *Contact Information* and *DHS Involvement*) will update to include that person's information.

**Detail Information**

<b>MCI ID</b>	<b>Name</b>	<b>DOB</b>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>SSN</b>	<b>Gender</b>	<b>Race</b>
<input type="text"/>	<input type="text"/>	<input type="text"/>

Detail Information

Client Information   Contact Information   DHS Involvement

Address Summary   Primary Phone Type   Primary Phone #   Email

Detail Information

Client Information   Contact Information   DHS Involvement

System	Status	Open Date	Case/Referral Last Updated Date	Paid Service Last Updated Date(KIDS-Only)	Referral/Case ID	Worker Name
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

3. After reviewing the *Person Search Results*, determine whether the individual is one of the potential matches.
  - a. If the desired individual is one of the potential matches, select that Potential Match in the grid and click  .

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

- b. If the desired individual is NOT one of the potential matches, click  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  .

### 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>