



Contact Information – Dragonfly Job Aid

The *Contact Information* screen is used to document the Client's contact information including address, phone number, and email.

Contact Information

MemberName	Gender	Birth Date	SSN	MCIID	
Susie Sunshine	Female	07/08/2001		1000863123	
Address Phone	Other				
Address Type	Address S	ummary	🗍 Primary Addre	ess? 🛓 Validate	d?
Home	123 N Main St, Pittsb	urgh, PA, 15215-2018		Yes	🥑 亩
Show 10 entrie	S	Address 2		First Previous	1 Next Last
-Select-				-Select-	-Select-
Belete				Sciett	
City	Neighborhood/Municipality	State *		Zip Code	Extension
	-Select-	-Select-			

Navigation

- 1. From the **Dashboard** : Locate the desired Referral and click on the *Referral ID* to bring the Referral into focus.
 - a. Click on the **Contact Information** tile.
- 2. The **Previous** and **Next** buttons can be used to navigate up or down one screen within the Left Navigation tiles.
- 3. Click Save at the bottom of the screen before navigating away from the Contact Information 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.





Contact Info Address Tab

Å	Member Name	🛔 Gender 🖕	Birth Date 🛔 S	SSN 👙 MCLID	
1	October Novembe	er Female 0	5/06/1995		
lress Phone	e Other			inst Prestous	
Address	Туре	Address Summary	Primary Address	Validated?	
Address Type * -Select-	Address 1 *	Addre	iss 2	Primary Address	County Allegheny
City	Neighborhood/M -Select-	Iunicipality F State	* Isylvania	Zip Code	Extension
				1	Import Info

- 1. The Client's name and basic information will appear at the top of the Contact Information pane.
- Address tab: Document the Client's address information:
 a. Address Type: Select the type of address being documented from the drop-down.
 - b. Address 1 and Address 2: Enter the Address line 1 and Address Line 2 (if applicable).
 - c. *Primary Address*: Select Yes or No from the drop-down. Only one address can be the Primary Address at a time.
 - d. *County*: Select the County from the drop-down.
 - e. *City*: Enter the City
 - f. Neighborhood/Municipality: If known, select the Neighborhood/Municipality from the dropdown.
 Note: When the address is validated the Neighborhood/Municipality will be identified in the Address Validation Search Result list.
 - g. *State*: Select the State from the drop-down.
 - h. *Zip Code* and *Extension*: Enter the Zip Code and Extension (if known).





3. Saving and Validating the address: When an address is validated, Synergy compares the entered information to the postal code address list and generates a list of possible addresses formatted properly. The Validation process will also automatically include the *Municipality* in the *Search Result* grid.

Address Validation						
Address Information						
Address Type	Address 1		Address 2		City	County
Home 🔽	Home 🔽 123 N Main St		Pittsburgh	ttsburgh Pittsburgh		Allegheny 🔽
Neighborhood/Municipality	/ Sta	ate		Zip Code	Extension	
-Select-	-Select- 🗹 Pennsylvania		\checkmark	15215		
Search						
Search Result						
Address Line 1	Address Line	2 Munic	ipality	City	State	Zip Code
123 N Main St	Aain St Sharpsburg		g Borough	Pittsburgh	PA	15215-2018
Select		Cancel		Create address as	entered	

- a. Click Save & Validate to open the *Address Validation* pop-up. The *Search Result* grid will already be populated with the possible search results.
 - i. If the Search Result list includes the desired address, click on the correct address
 - in the grid and click $\stackrel{\text{Select}}{}$. The *Address Validation* pop-up will close and the selected address will appear in the *Address* grid with a $\stackrel{\checkmark}{}$ to indicate that the Address has been validated.
 - ii. If the correct address is not in the Search Result list, the Address Information can be updated and searched again. To do so, edit the Address Information and click
 Search
 - iii. If, after searching again, the address cannot be located in the *Search Result* list the address can still be saved without validation. To do so, click

Create address as entered . The Address Validation pop-up will close and the selected address will appear in the Address grid with an \bigotimes to indicate that the Address has not been validated.

iv. Clicking **Cancel** will close the *Validate Address* pop-up without validating or changing any information.





2. Editing, Validating or Deleting an Address:

🖕 Address Type	Addre	ess Summary	Å.	Primary Address?	÷ V	alidated?		
Home	123 N Main St, Pit	tsburgh, PA, 15215-2018				Yes	Ø	Ē
Show 10 💌 entr	es			Fir	st Pre	evious 1	Next	Last

- a. To edit an address that has already been entered in the *Address* grid:
 - i. Click on the address in the *Address* grid, update the information below the *Address* grid and click Save & Validate.

OR

ii. click on the \checkmark / \bigotimes in the Address grid to the right of the address to be edited.

Both options will open the *Address Validation* pop-up where the user can either select from the list of *Search Result* list or Update address as entered.

b. To delete an address, click the Delete Icon [$\widehat{\mathbf{m}}$] to the right of the address in the grid. A *Confirm Delete* pop-up will appear:

	Confirm Delete
	Clicking on "Yes" button will delete this record. Would you like to proceed?
	Yes No
Clicking Yes wil	l delete the address.
Clicking No wil	I cancel the action and the address will not be delete

c. To add another address, click the **New** button at the bottom of the tab.





Contact Information – Phone tab

1. The *Phone* tab allows users to view, edit, or add phone numbers for the Clients. The *Phone* grid can be sorted on any of the header titles. The *Phone* grid lists whether or not a phone number is the individual's primary phone as well as any notes that have been entered about that phone number. Click on the *Phone* tab to view or update the individual's phone information.

Address	Phone Other				
Å V	Phone Type	Phone #	🛔 🛛 Primary Pho	one 🔺 Phone Notes	
A	Home	(555) 555-5555	Yes	Call after 7pm	n B
Show	10 💌 entries			First Previous	1 Next Last
Phone -Selec	Type * Pho t- 🔽	ne#*	Phone Notes	Primary Phone?	
	New	Save			Import Info

- a. To view or edit a phone number click on the desired phone number in the *Phone* grid. The information will appear below the grid.
- b. To delete a phone number, click the delete icon [I] to the right of the phone number in the *Phone* grid. A *Confirm Delete* pop-up will appear: Clicking Ves will delete the phone number. Clicking will cancel the action and the phone number will not be deleted.
- c. When entering or updating a new phone number: enter or update the following information:i. *Phone Type*: Select the type of phone from the drop-down.
 - ii. *Phone #*: Enter the 10-digit phone number.
 - iii. *Phone Notes*: Enter notes about the phone number (if needed) such as: "Call after 7pm".
 - iv. *Primary Phone?*: Indicate whether or not this is the Consumer's primary phone by selecting "Yes" or "No" from the drop-down.
- d. Click Save to add the entered information to the *Phone* tab.
- e. To add another phone number, click the **New** button at the bottom of the tab.





Contact Information – Other tab

4. The *Other* tab allows users to view, edit, or add an email address for an individual as well as note information on preferred communication methods and times.

Address Phone	Other				
Email Address	A	Best Way To Communicate With You? -Select-	B	Best Time To Communicate With You?	C
Save	D				Import Info

- a. *Email Address*: Enter an *Email Address* for the individual (if known).
- b. *Best Way To Communicate With You*?: Select the best way to communicate with the individual from the drop-down.
- c. *Best Time To Communicate with You*?: Select the best time to reach the individual from the drop-down.
- d. Click Save to save the entered or edited information.
- 5. Click Save at the bottom of the screen before navigating away from the Contact Information 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.
- 6. The Next button at the bottom of the screen can be used to navigate to the next screen within the Left Navigation tiles.





Import Info

1. At the bottom of each tab is an Import Info button. Synergy checks to see if this individual's contact information has been updated in another connected system. If the information has been

updated and is different from what has been entered on this screen the Import Info button will turn dark blue. As long as the information available to import remains different from what is entered in Dragonfly this button will remain dark blue.

Import Info								
Туре	Entered	Last Updated	Available	Last Updated	Include?			
Home Address	193 Street , Pittsburgh , PA 15222	01/06/2017	193 SOUTHERN AVE , PITTSBURGH , PA 15211	08/02/2016				
Save	Cancel							

- a. Clicking the Import Info button will open the Import Info pop-up where the updated address, phone or email information will be listed. To import the information in to this screen, select the desired address, phone number or email from the Import Info grid by checking the Include? checkbox.
- b. Click Save to import the information.
- c. Clicking **Cancel** will close the *Import Info* pop-up without importing any information.

For more information...

For assistance, please contact the Allegheny County Service Desk at <u>ServiceDesk@AlleghenyCounty.US</u> 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