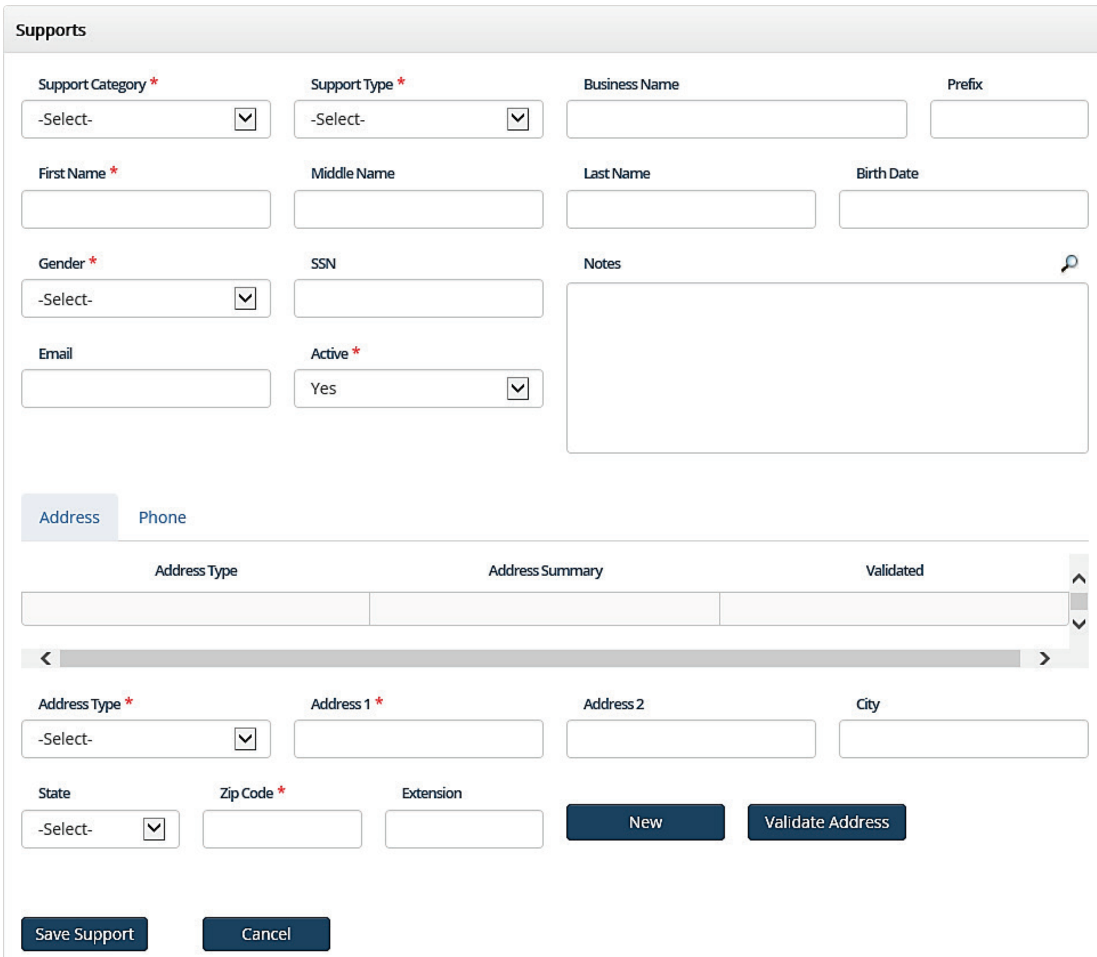
Supports – Dragonfly Job Aid

The *Supports* screen allows users to view, edit, or add Supports to the Referral. Supports are individuals who support the Client either in a professional or natural/community support capacity.

Supports

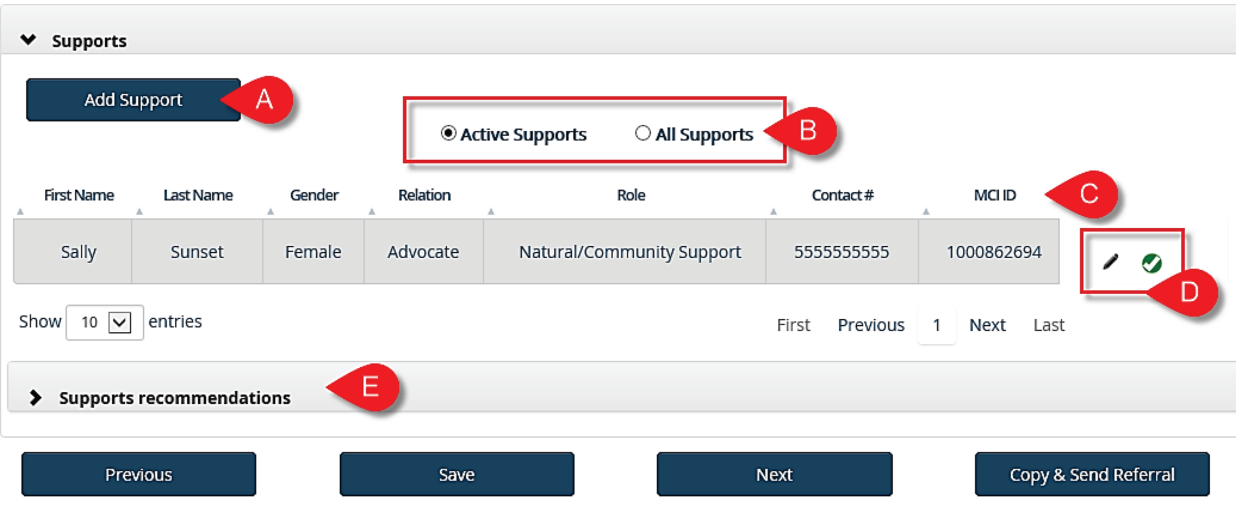


Navigation

1. From the **Dashboard**: Locate the desired Referral and click on the *Referral ID* to bring the Referral into focus.
   a. Click on the **Supports** tile.
2. The **Previous** and **Next** buttons can be used to navigate up or down one screen within the Left Navigation tiles.

Supports

1. The **Supports** pane allows users to review, edit, MCI clear, add, or deactivate/activate Supports.



   a. The list will default to *Active Supports*. To view both active and deactivated Supports select the *All Supports* radio button.

   b. To add a new Support, click **Add Support**.

   c. The *Supports* grid contains basic information about the Supports including their *Name, Gender, Relation* (to the Client) *Role, Contact #,* and *MCI ID* (if the Support has been MCI Cleared).

   d. These buttons can be used to run an MCI Clearance on a Support or edit the Support's information, or move a Support to the Household.

      i. To view or edit the information entered for a Support click on the Edit Icon [ ] to the right of the individual's line in the grid. That individual's *Supports* pop-up will appear.

         1. To close the *Supports* pop-up without making any changes click **Cancel**.

ii. To the right of the Edit Icon is the MCI Icon. This indicates whether or not the individual's MCI clearance has been performed.

1. indicates that an MCI clearance has not been performed.
2. indicates that an MCI clearance has been performed.
3. To clear or re-clear an MCI click on the or for the desired individual.

*See **Page 8** of this Job Aid for instructions on how to MCI Clear a Support.*

e. **Supports Recommendations** sub-pane: These recommendations come from the KIDS System when a Referral originates in KIDS.

Supports recommendations

First Name	Last Name	Gender	Contact #	System	MCI ID	Action
Janet	Jones	Female	555-555-5555	KIDS	123456789	Add to Referral

i. Click the **Add to Referral** button to the right of the desired individual's line in the grid to add this person as a Support.

ii. The *Supports* pop-up will appear. Enter all of the relevant information for the Support and click **Save Support**.

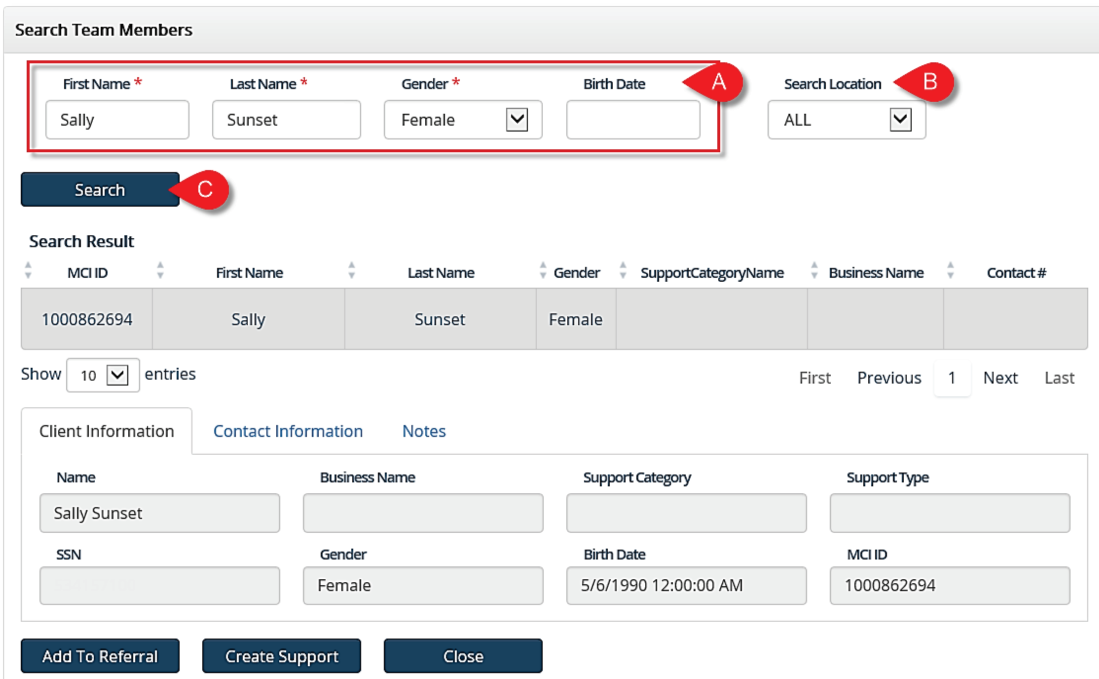
iii. To close the Supports pop-up without adding the individual, click **Cancel** within the Supports pop-up.

2. Always click **Save** at the bottom of the screen before navigating away from the **Supports** screen.

Creating a New Support

1. To create a new Support, click the **Add Support** button.

2. The *Search Team Members* pop-up will appear:



a. Enter the *First Name, Last Name, Gender,* and *Birth Date* (if known).

> ***Note:*** *Do not enter birth dates for Professional Supports.*

b. *Search Location*: This drop-down defaults to "ALL" which searches through all of Synergy. Supports can be searched for in "ALL" of Synergy or only in a specific program such as YSP, HCM, or ITM.

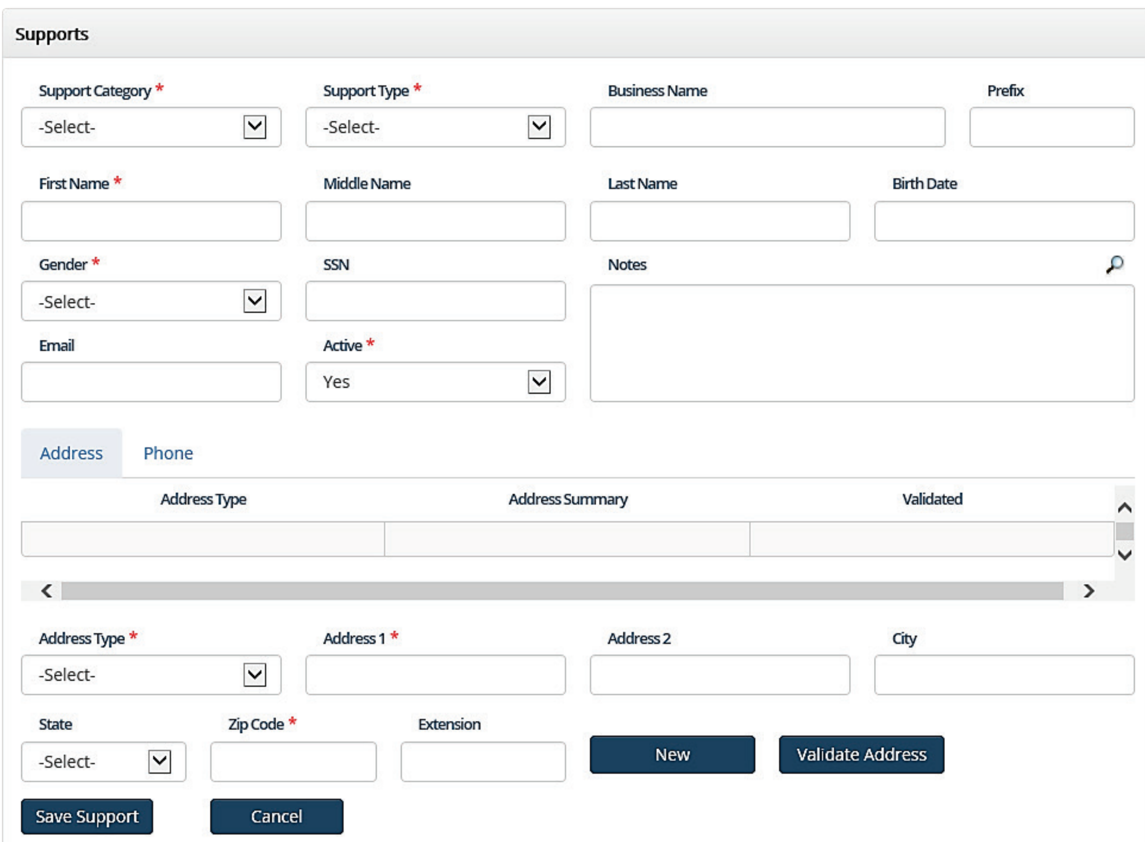
c. Click the **Search** button to locate possible matches in the system. A list of possible matches will display in the *Search Result* grid. Click on a line in the grid to view that individual's information.

d. Review the results including the information on the *Client Information, Contact Information,* and *Notes* tabs.
   i. If there is a match in the *Search Result* grid, click the desired person's line in the *Search Result* grid and then click **Add to Referral**.
   ii. If none of the results match the person being added, click **Create Support** without selecting anyone from the *Search Results* grid.

e. To close the *Search Support* pop-up without adding a support click **Close**.

Completing the Supports pop-up

1. When **Create Support** or **Add to Referral** is clicked the *Supports* pop-up will appear.
2. Enter all of the relevant information for this Support in the *Supports* pop-up.

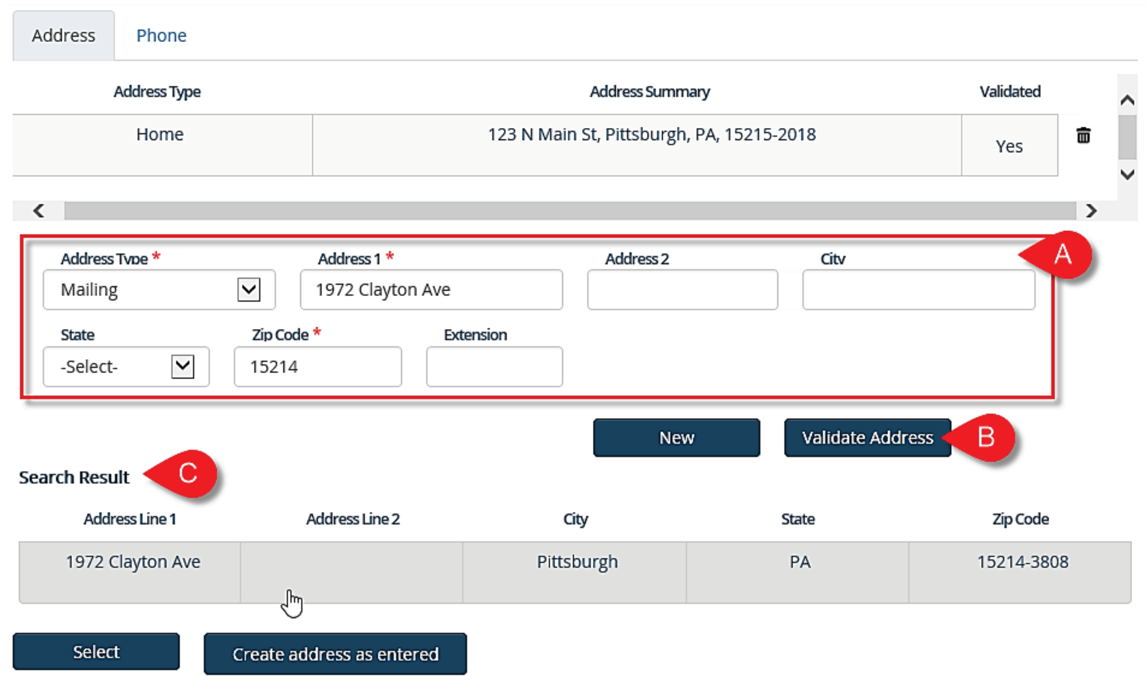


   a. The Support can be made Active or Inactive at any time by selecting "Yes" or "No" from the *Active* drop-down.
   b. *Support Category, Support Type, First Name, Gender* and *Active* are all required in order to save a Support entry.

3. When the entire *Supports* pop-up has completed click **Save Support** at the bottom of the pop-up to save the information entered or changed.

4. Clicking **Cancel** at the bottom of the pop-up will close the pop-up without saving any of the information that was entered or changed.

5. *Address* tab: Multiple addresses can be entered for the Support. The Support can also be saved without entering an address.



a. To enter a new address, select the *Address Type*, and enter all of the known address information.

b. Click **Validate Address**.

c. If the *Search Result* list includes the desired address, click on the correct address in the grid and Click **Select**.

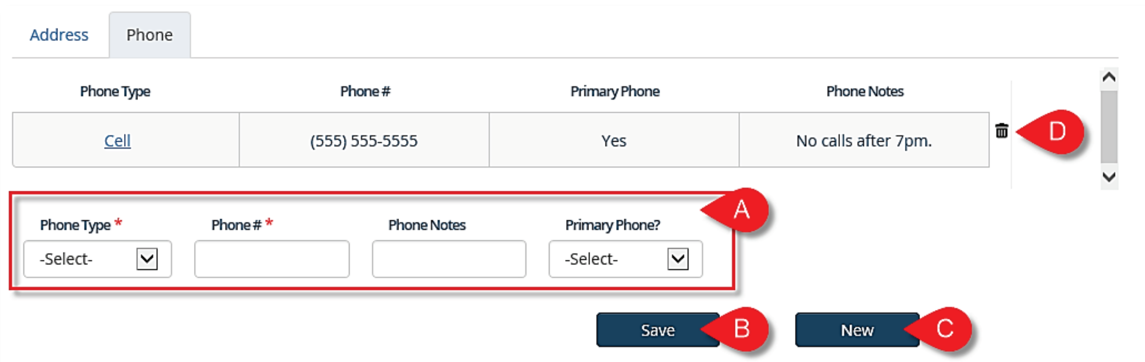
   i. If the Correct address is not in the Search Result list, the *Address Information* can be updated and searched for again. To do so, edit the *Address Information* and click **Validate Address**.

   ii. If, after searching again, the address cannot be located in the *Search Result* list, the address can still be saved without validation by clicking **Create address as entered**. The address will appear in the *Address* grid with a "No" in the *Validated?* column to indicate that the Address has not been validated.

d. If an address has been added in error, click the delete icon [🗑] to the right of the address in the *Address* grid to delete.

e. To add a new address, click **New**

6. *Phone* tab: Multiple phone numbers can be entered for the Support. The Support can also be saved without entering a phone number.



a. To add a new phone number, click on the *Phone* tab:
   i. *Phone Type*: Select the type of phone number being entered.
   ii. *Phone Number*: Enter the 10 digit phone number.
   iii. *Phone Notes*: If applicable, enter notes about the phone number.
   iv. *Primary Phone?:* Use the drop-down to indicate whether or not this phone number is the primary phone number for this Support. Note that only one phone number can be marked as primary at any given time.

b. Click **Save** to add this phone number to the *Phone* grid.
   i. To edit an existing phone number, click on the desired number in the grid.

c. To enter additional phone numbers, click **New**.

d. If a phone number has been added in error, click the delete icon [🗑] to the right of the phone number in the *Phone* grid to delete it.

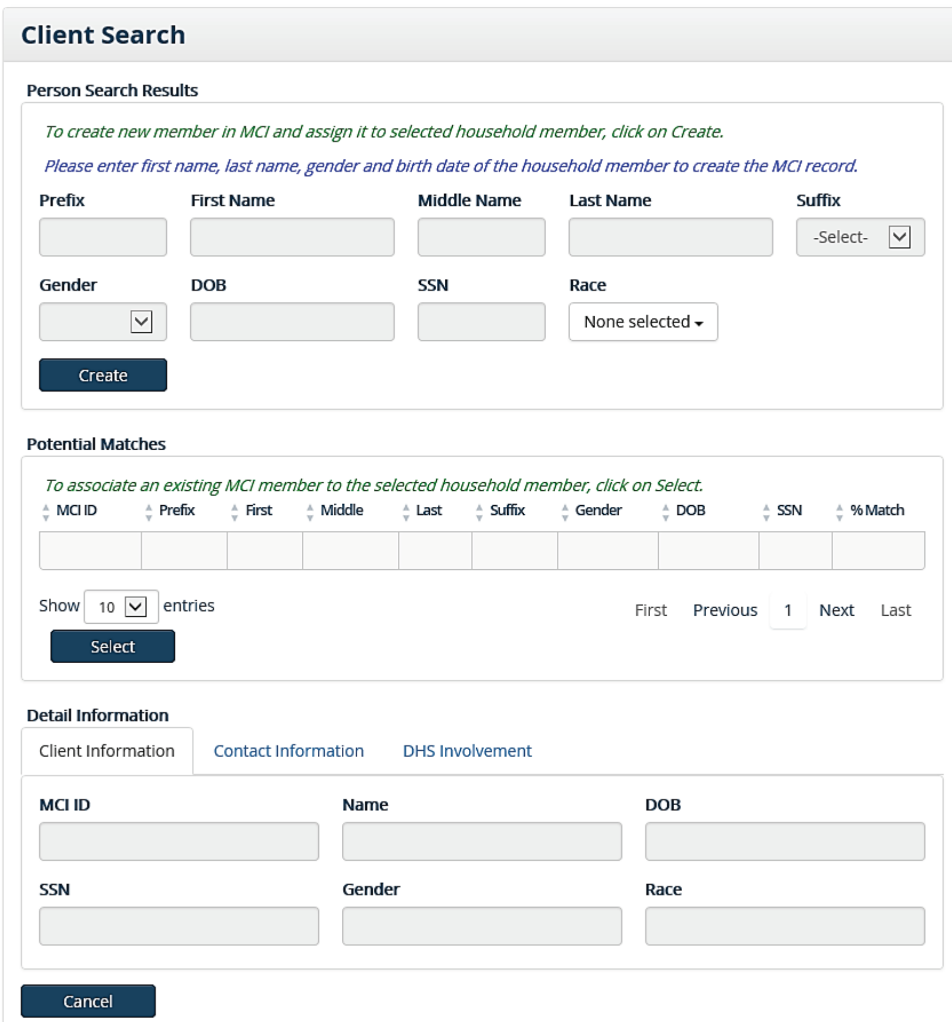
7. Click **Save Support** at the bottom of the pop-up in order to save the information entered. Clicking **Cancel** will close the pop-up without saving any of the information entered or edited.

MCI (Master Client Index) Clearing

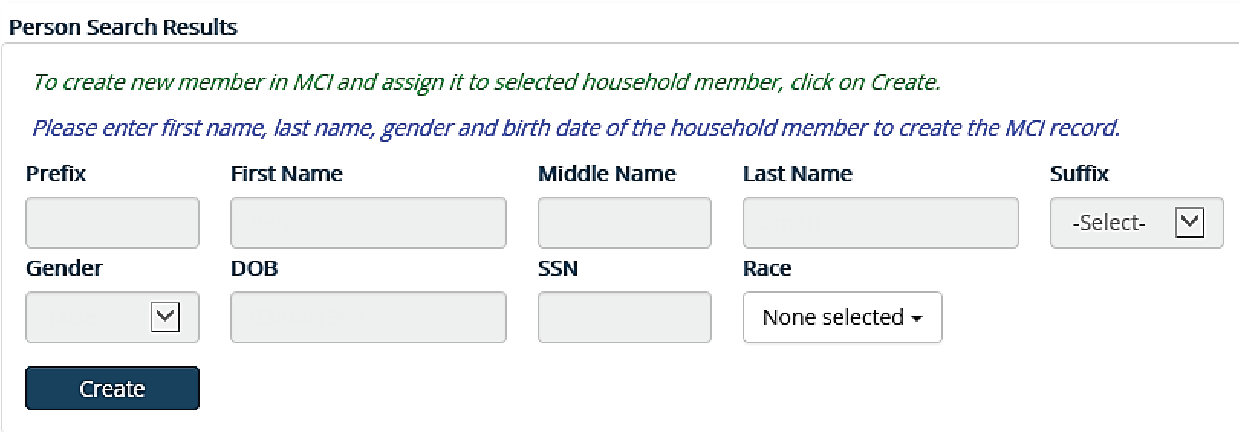
DHS' goal is to ensure that all services, connections, and information for an individual are connected to one ID, the Master Client Index ID (MCI ID).

The MCI Clearance process assists in this by helping to minimize the possibility of duplicate MCI IDs within DHS applications.

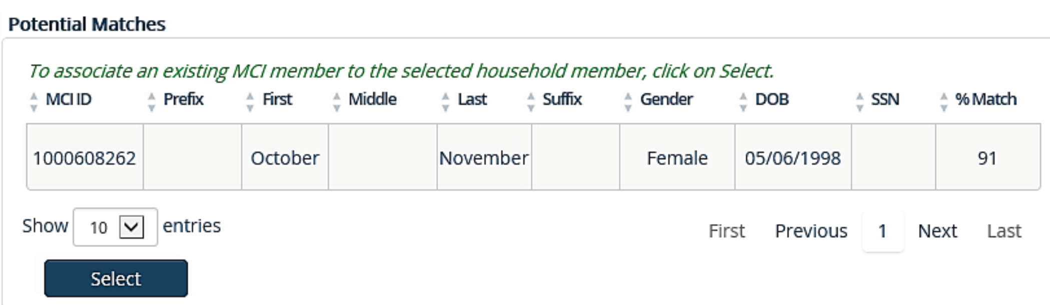
1. Individuals who have an MCI (Master Client Index) ID in the grid have already been cleared. Individuals can be re-cleared if new information is entered. To open the MCI Clearance pop-up (*Client Search*), select the desired individual and click on the MCI Clearance Icon **[** ❌ or ✅ **]**.



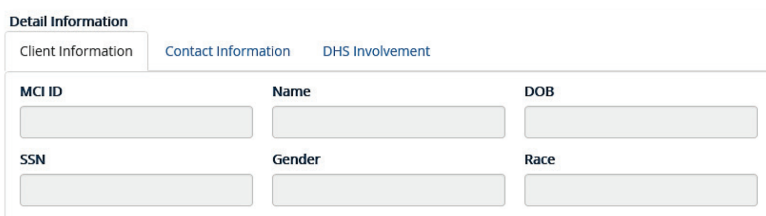
2. The *Person Search Results* section contains the information that has been entered in this Case for this individual. Compare this information to the *Potential Matches* section.

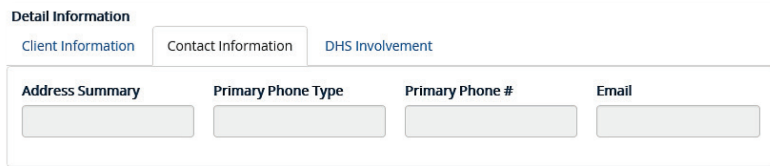


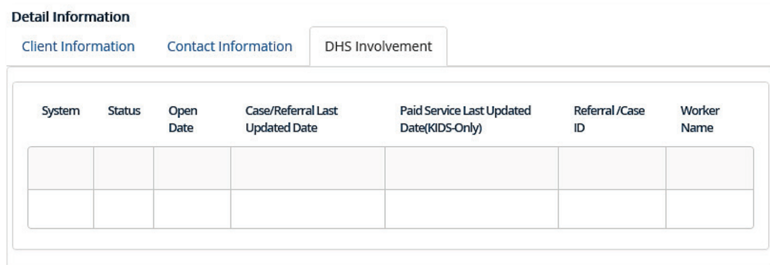
a. The *Potential Matches* section contains a grid of all possible matches. Note the *% Match* column. This percentage refers to how likely it is that the desired individual is this person based on the demographic data entered.



i. 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.







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 **Select**.

> ***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 **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**.

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